KANTAR

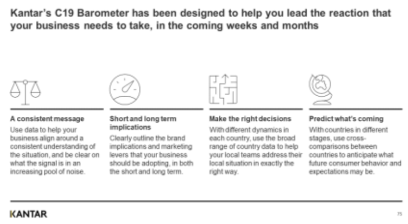
# COVID-19 Barometer

# The Netherlands

Wave 6

July 8, 2020

# How we have built your story


**Kantar's C19 Barometer has been designed to help you lead the reaction that your business needs to take, in the coming weeks and months**

**A consistent message**
Use data to help your business align around a consistent understanding of the situation, and be clear on what the signal is in an increasing pool of noise.

**Short and long term implications**
Clearly outline the brand implications and marketing levers that your business should be adopting, in both the short and long term.

**Make the right decisions**
With different dynamics in each country, use the broad range of country data to help your local teams address their local situation in exactly the right way.

**Predict what's coming**
With countries in different stages, use cross-comparisons between countries to anticipate what future consumer behavior and expectations may be.

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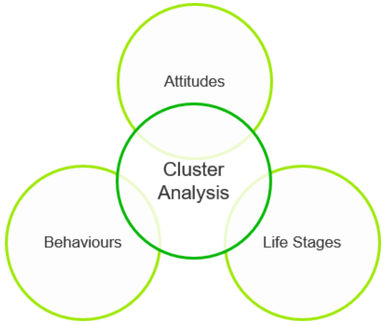



Kantar's own COVID-19 Barometer: looking at consumer's attitudes, behaviours and expectations.

Mapping the effects on brands and consumers by combining our own knowledge and expertise

Chatbot Neo

*See page 3*

A global segmentation based on 13 golden statements, leading to six segments

*See page 4*

# Neo, a chatbot designed by Kantar Netherlands, gained insights on behavioural changes during COVID-19 by having in-depth conversations with consumers via Facebook Messenger

We used *Chatbot Neo* in Facebook to gain additional insights on how the COVID-19 crisis influenced people's behavioural changes now there is a less stringent lockdown.

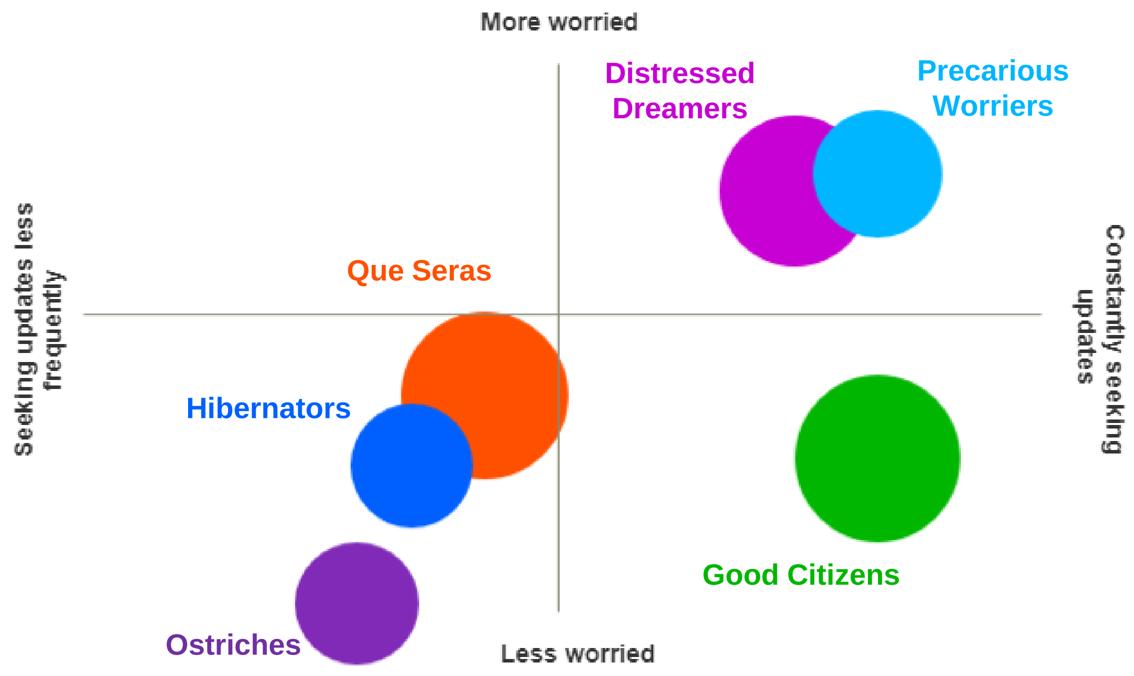
People were invited via a Facebook advertisement in the period of 20 to 23 June to talk about their behaviour. Those who participated were eligible to win a Bol.com voucher.

There were 302 participants of 18 years or older, of which 178 continued to the statements section. Demographics such as gender and age were also covered.

Participation followed via Facebook Messenger, where a real chat conversation was simulated. Spontaneous answers were given as they perceived a more anonymous feeling when chatting – thus sharing some deeper feelings and thoughts.

# Kantar global created a global segmentation to identify groups of similar behaviours and attitudes towards COVID-19

- Kantar has created a global segmentation. A segmentation divides a population into groups of like-minded individuals. Each segment has features which make it distinct and different from other segments. Factor analysis is used to identify groups of similar behaviours and attitudes towards COVID-19, which created the COVID-19 ‘’TRIBES’’. Thirteen golden questions have been identified by Kantar UK and used for the creation of the segments.
- Our six TRIBES differ on two key dimensions: 1) The degree of concern they feel and 2) Their drive to keep up with the latest COVID-19 news
- The globally created segments have also been used to look at differences in The Netherlands and we will look through the lens of the segments for two key topics: what are the implications for brands, and for advertising?



# MANAGEMENT SUMMARY

### How are we feeling?

The **overall concern** and experienced **impact** on day-to-day lives **continues to decrease** in the Netherlands. However, still 55% of the Dutch are concerned about the situation and 60% experience impact on their day-to-day lives.

The Dutch feel **more confident** about their financial future: those who have not been financially impacted by the coronavirus yet, increasingly do also not expect this for the future.

Almost half of the Dutch **work as normal**, of which 18% works normal but from home. Age group 18-34 is impacted most; they relatively often work on reduced hours/salary and have relatively often become unemployed.

### What are the implications for customer experience?

The increase in working from home and generally being more at home made people more dependent on **internet and telephone connections**. Good news: consumers generally review their experiences with telecom positively during the COVID-19 crisis.

The way we **shop** changed drastically because of the necessary COVID precautions. The result: **'funshopping' no longer exists**; for many shopping comes with unjoyful and uncomfortable feelings that take away the fun aspect. Negative shopping experiences contribute to postponing and visiting only for necessary products; online buying becomes more popular.

### What are the implications for brands and advertising?

The Dutch increasingly expect brands to take a more positive and active role. There is even increasingly **room for brands to be optimistic** and think in an unconventional way.

Do however mind the differences **for different segments;** while some indeed want brands to be optimistic, this is the last thing others now want from brands. Also note that consumers who want to be up to date about COVID-19 news are also more open to **brands advertising** about what they do in relation to the crisis.

### Returning to our pre-COVID lives

A quarter of the Dutch want to go back to their offices, restaurant/bar and the gym **as soon as government restrictions are lifted**. Those who want to wait longer, have either found better alternatives (working from home) or are scared of their safety.

We are much looking forward to travelling abroad, and 45% feel safe to do so within the next six months. Those who want to wait longer than 1 month, either feel unsafe, fear they cannot fully enjoy holidays due to remaining restrictions, or think it's irresponsible.

# RECOMMENDATIONS

## Consider age differences when looking at impact

Different age groups are impacted differently by the crisis. Age group **18-34 is impacted most** on a financial level; they relatively often work on reduced hours/salary and have relatively often become unemployed.

Gen Z (18-24) has a relatively large group of Que Seras (meaning they are relatively relaxed and think the rules are a bit excessive), **Millennials** have a relatively **large group of Ostriches**. The proportion of Good Citizens and Distressed Dreamers increases as age increases. While the fear of the older age groups is more around health, fear of the youngest age group is more around finance and future outlook.

## Bring the fun back in physical shopping

Consumers have experienced shopping in physical stores in the ''new normal'' for the first time and **do NOT like it**. The government regulations about keeping social distance and regular sanitizing will however most likely stay for some time. Companies that rely heavily on physical stores need to **find a way to bring the fun back in shopping** before also the late majority & laggards move to online (only). Adding additional service might be an option.

Realize that different segments have different needs in their customer journey. While for some it's most important to provide clear information to reduce and manage friction (Ostriches), **for others it's important to provide positive reassurance at key moments on the journey** (Distressed Dreamers)

## Understand your category and target group

Always play from a position of strength and be authentic in your communications – do however also realize that your target group may contain Ostriches, Precarious Worriers ánd Hibernators. Their different levels of concern and need for regular updates impact **what they're looking for in brands and advertising**. Stay close to yourself, but adjust your tone of voice to match varying needs.

Understand each segment's unique behavioural dynamics with your category and brand to (continue to) design effective strategies.

## Returning to our pre-COVID lives

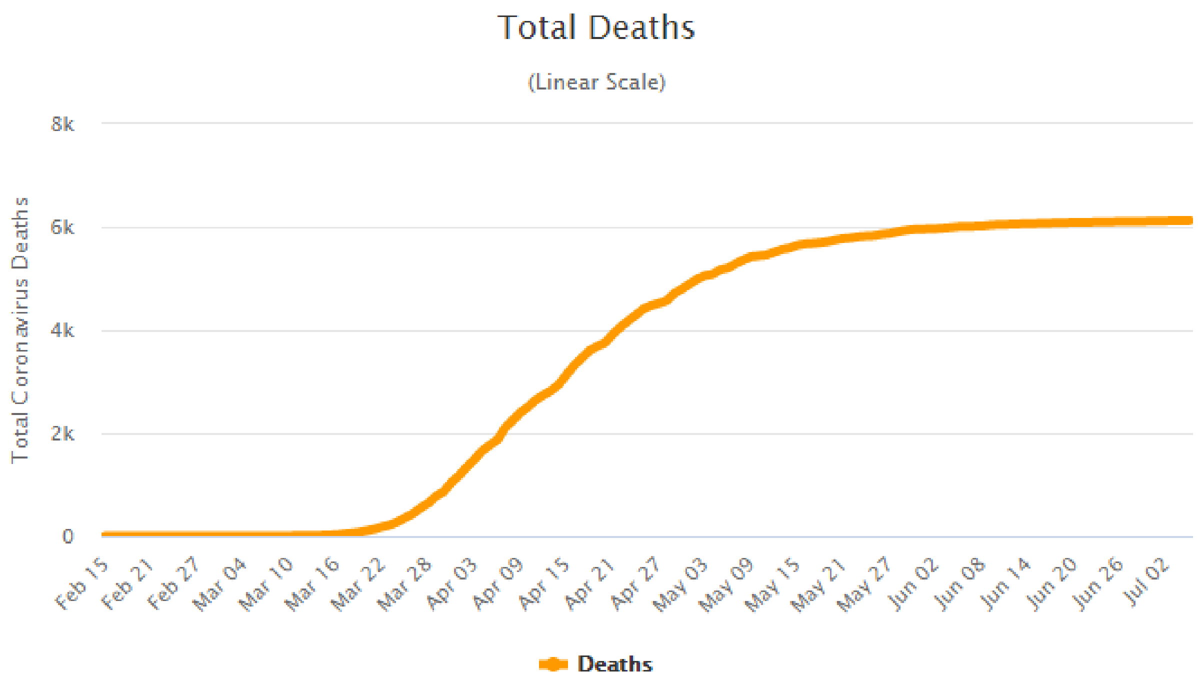
The **Dutch are slowly planning for the future**. Some things will go back to how they were pre-COVID, other things will likely never (fully) return to normal.

People who do not feel comfortable to go back to their offices, to restaurants, etc. are often scared of their personal health and safety **– a basic need.** Make sure people feel safe to use your product or service before you do anything else. Understand the fears and expectations most relevant in your category.

**Understand your employees'** needs with regards to working from home (when applicable) and understand how the tribes can help you with EX.

# COVID-19 timeline in the Netherlands; daily death numbers not increasing anymore, stepwise plan for getting to new normal activated by government. New lifting of restrictions planned for one week after wave 6 fieldwork

## Number of deaths per day

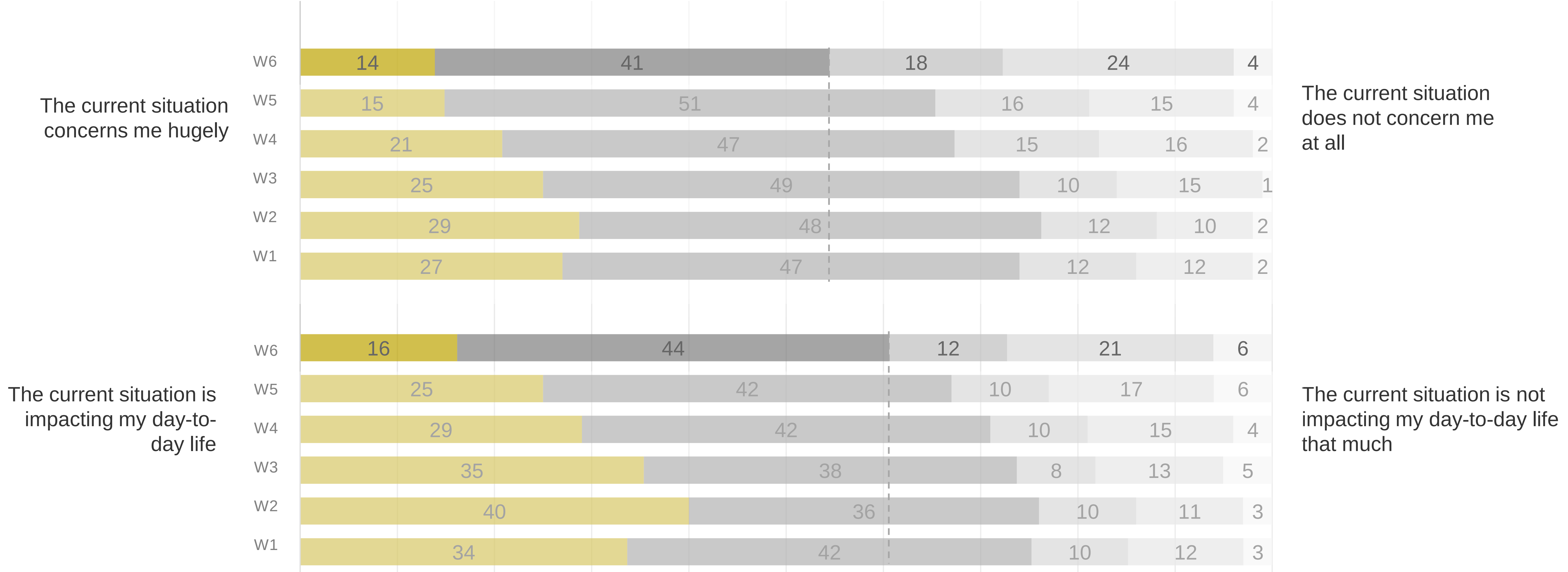



## Next steps lockdown Netherlands

# 1
# How are we feeling?

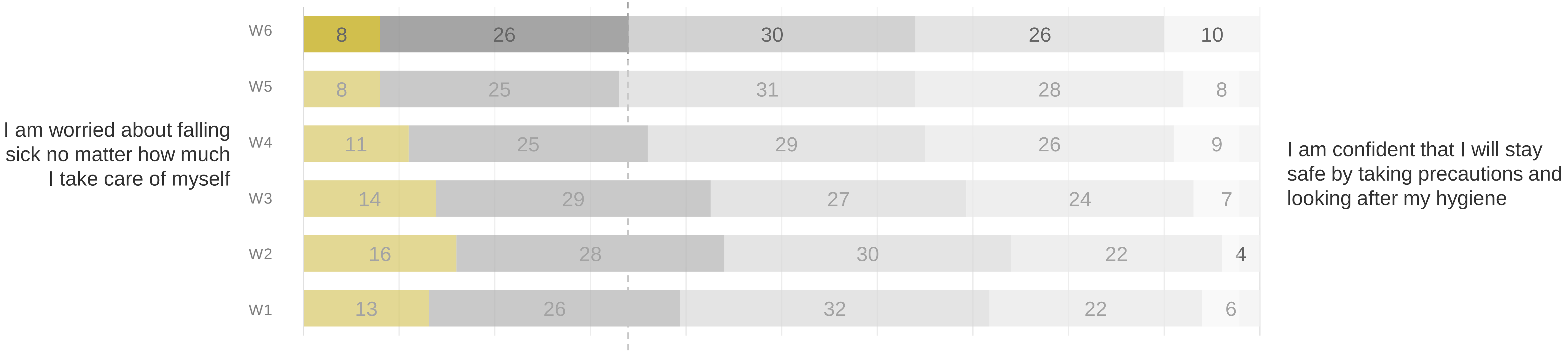
# 1.1
# Overall concern & impact on day-to-day lives

# The overall concern and experienced impact on day-to-day lives continues to decrease in the Netherlands. However, still 55% of the Dutch are concerned about the situation and 60% experience impact on their day-to-day lives



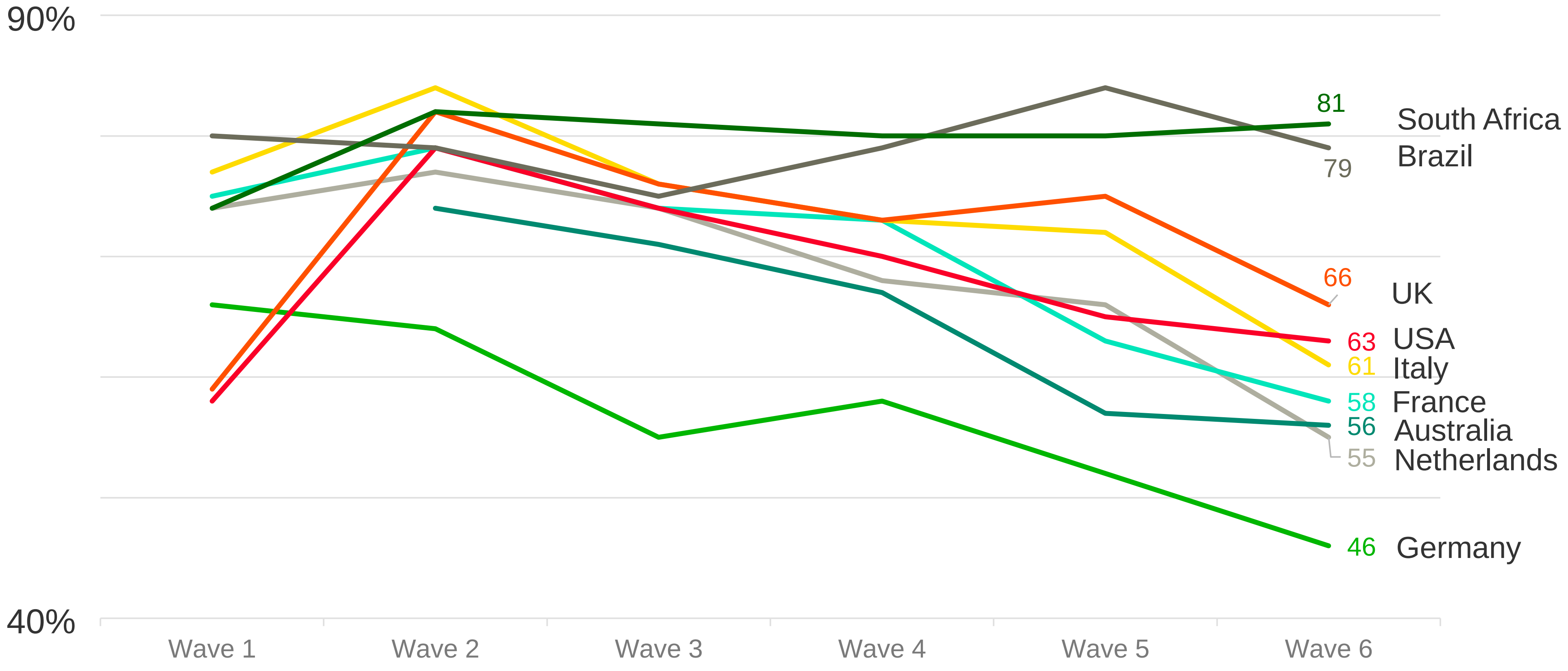

KANTAR BARO-METER NL COVID-19

# Worry about falling sick no matter how much people take care of themselves remains stable. One in three Dutch do not feel confident that they will stay safe by taking precautions and looking after their hygiene




KANTAR BARO-METER NL COVID-19

# Although concern about the situation declines over time in most markets, it remains high. In Germany, where consumers are worried least, this is still 46%. In all others markets > 55% remains concerned with the situation, and for Brazil and South Africa this is even 80%

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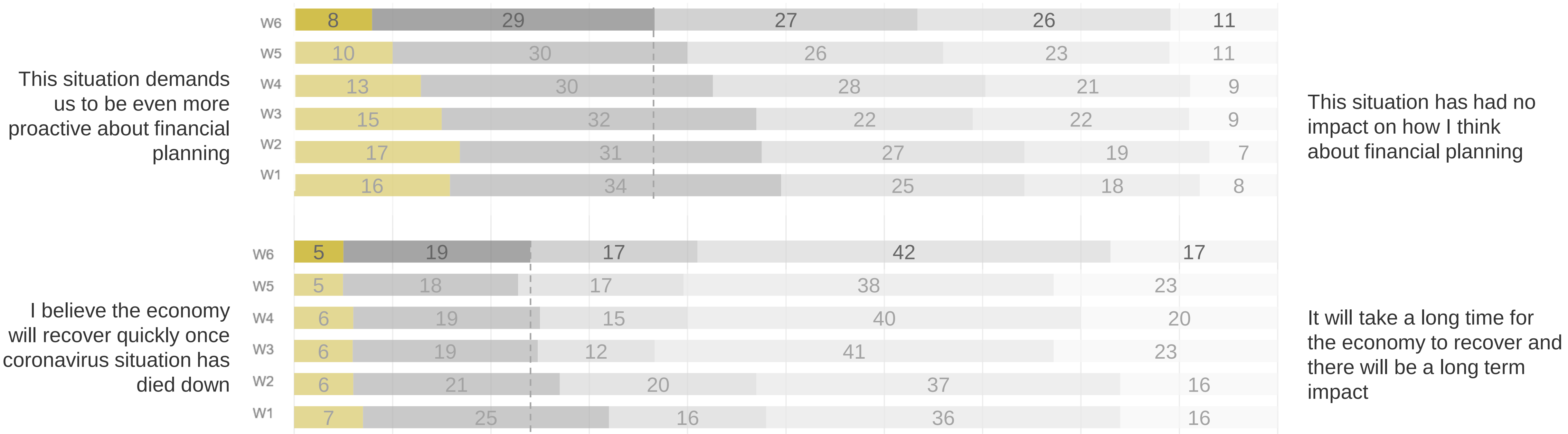
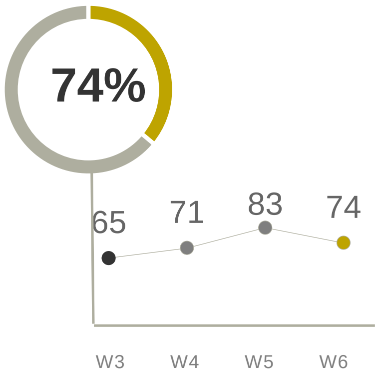
Q1: statement '' "The situation concerns me hugely''; top2 answer

# Although the number of Dutch that expect a long term impact of the corona virus on the economy remains stable (75%), the proportion that thinks that we need to be more proactive about financial planning in these uncertain economic times continues to decrease (37% now)

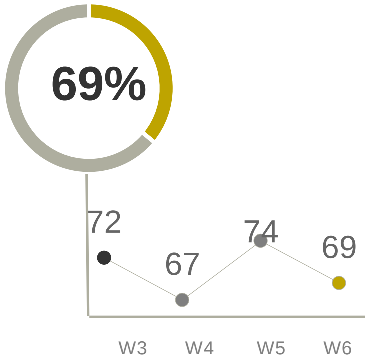


# Approval of government response to the pandemic is relatively high in Australia, the Netherlands, South Africa and Germany

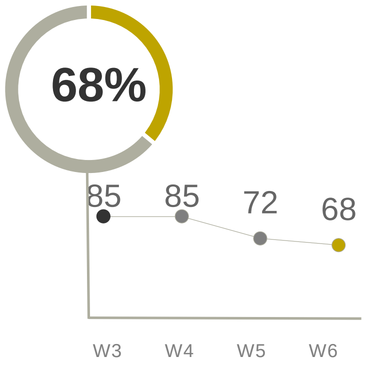
“How much do you approve of the way the government is responding to the coronavirus pandemic?”



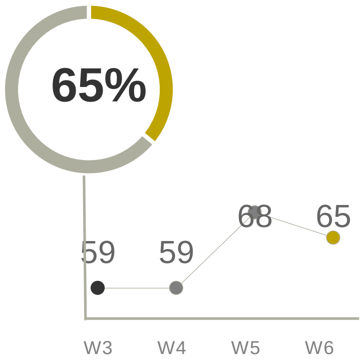

Australia




Netherlands




South-Africa

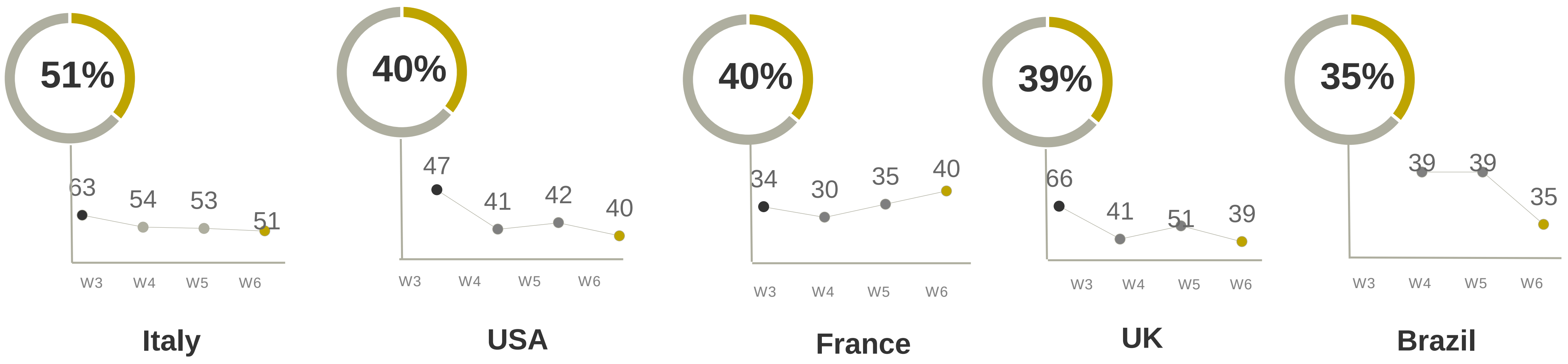



Germany

Shows Top2 data (strongly approve & somewhat approve)

# In Italy, the US, France, UK and Brazil the approval of government response is however a lot lower, also showing a low point for many markets

“How much do you approve of the way the government is responding to the coronavirus pandemic?”



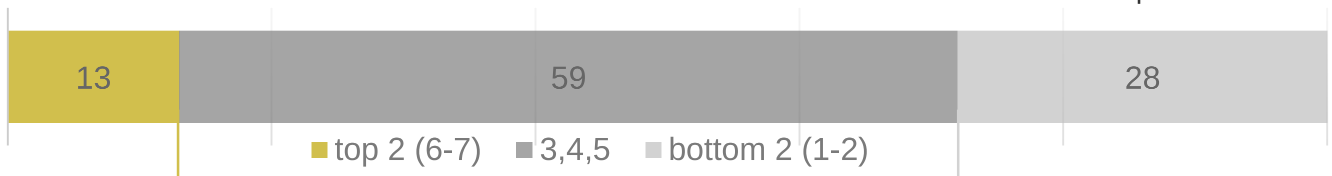

Shows Top2 data (strongly approve & somewhat approve)

# Following high government approval, roughly one in four Dutch get very angry when they see someone else not adhere to the latest government rules

***Differences on age***
Higher for 55+

When other people don't adhere to the latest government guidelines, I don't really mind

W6




I get very angry when I see someone else not adhering to the latest government guidelines

*"It's everyone's own responsibility and I also catch myself not sticking to it."*
***Female, 25-34, living alone***

*"Everyone is responsible for themselves, has a free will and self-determination."*
***Female, 45-54, couple with children***

*"The guidelines are nonsense and do not contribute to health. Now COVID-19 is almost extinct, so the measures have become superfluous."*
***Female, 18-24, living with parents***

*"If everyone sticks to it, the virus will disappear and we can return to the real normal sooner."*
***Female, 18-24, couple***

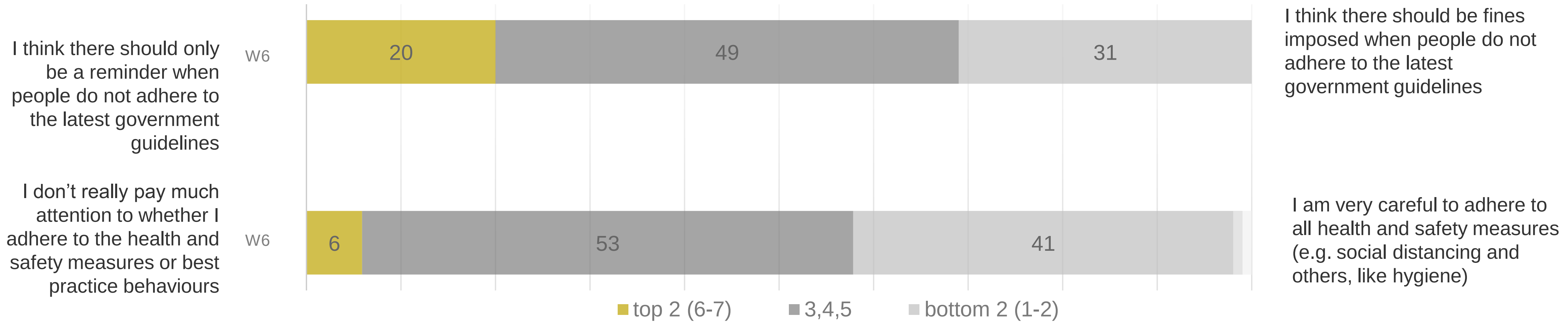
*"Then in my view you are selfish. Because you don't care about someone else's life. If you, as a risk person, cannot go to the store, or do it as carefully as possible, and someone else decides to ignore it, you can get sick. Well then you only think about yourself!"*
***Female, 25-34, living with parents***

*"I am very afraid of an even stricter lockdown as a result of the second wave. And by not adhering to the regulations this increases the chance of that second wave."*
***Female, 35-44, living alone***

# And almost one in three thinks there should be fines imposed when people don’t adhere to the rules

***Differences on age***
Higher among 18-34 yo (38%)

***Differences on age***
Higher for 55+ (36%)




***Differences on age***
Higher for 55+ (53%)
Lower among 18-34 yo (27%)

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# Although the current situation impacts the mental health of a relatively small proportion of the Dutch, this is more the case for people between 35-54 yo and for women

***Differences on age & gender***
Higher for 35-54 and women


*"A very positive one, I am MUCH happier now that I can be at home a lot and have less pressure and obligations."*
***Female, 18-24, living alone***

*"I still enjoy every day, without stress. Certain things you cannot influence, you just have to accept."*
***Male, 25-34, couple***

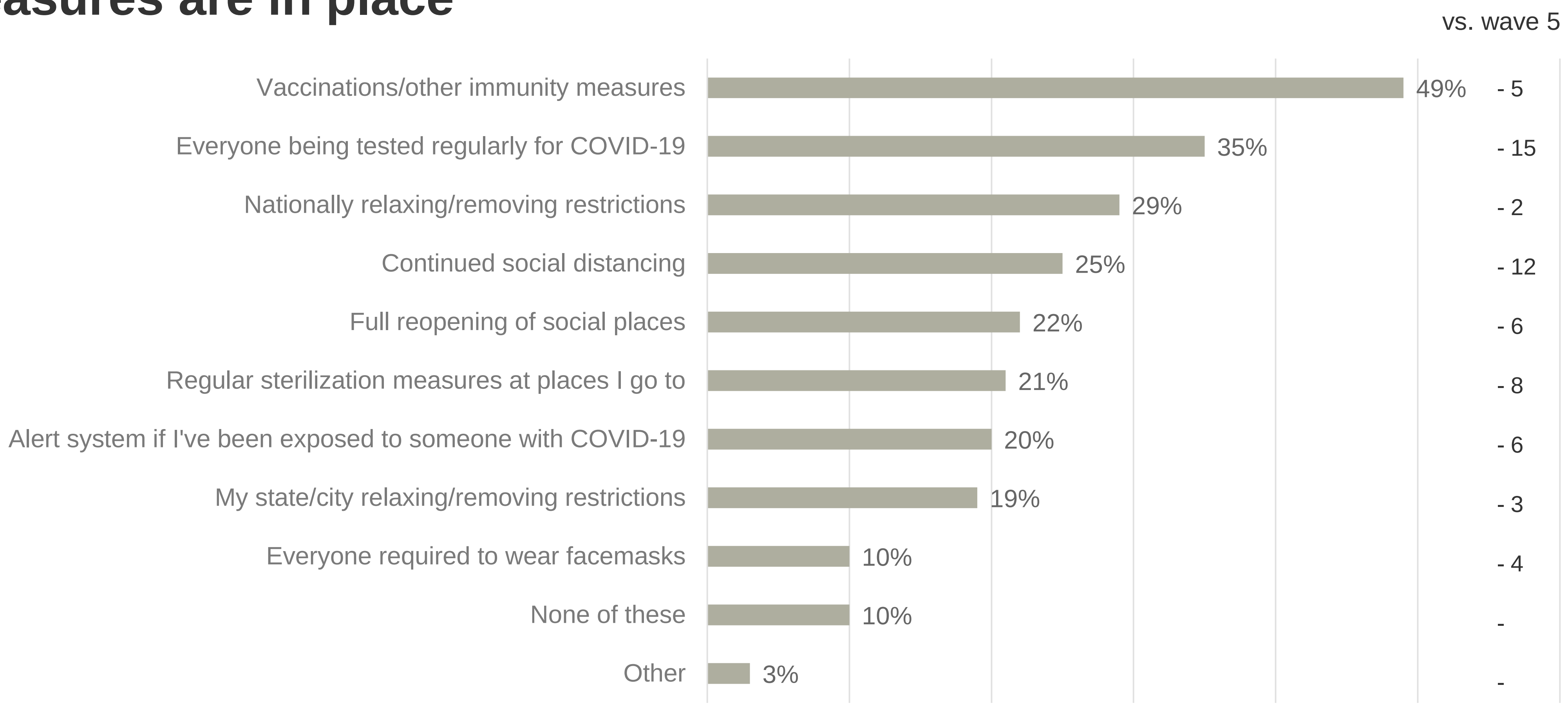
*"Maybe even better for my mental health now than the hectic and madness periods before. I have more time at home and more time for myself is better."*
***Male, 35-44, couple***

*"I have started to feel a lot more depressed, more anxious and cry a lot faster."*
***Female, 18-24, living with parents***

*"I am fighting to not become depressed, this situation asks a lot of my ability to accept."*
***Male, 45-55, living alone***

*"I am languishing. I live for the summer season in which I travel, dance, meet new people and gain new experiences. That's where I get my energy from. That makes me incredibly happy. Now everything is so gray."*
***Female, 25-34, couple***

# As the government continues to relax the restrictions, the Dutch are less focused on safety measures. However, still almost half indicates they will feel safe to (fully) return to normal daily life if vaccinations or other immunity measures are in place

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Q54: Which of the following would need to happen for you to feel safe to return to normal daily life?

# Across markets, most put their trust in vaccinations. Compared to a month ago, regular sterilization at places people go to is increasingly seen as a good measure to increase a sense of safety to return to normal daily

| | NETHERLANDS | UK | USA | ITALY | GERMANY | FRANCE | CHINA |
|---|---|---|---|---|---|---|---|
| 1 | Vaccinations | Vaccinations | Vaccinations | Vaccinations | Vaccinations | Continued social distancing | Everyone required to wear facemasks |
| 2 | Regular testing | Regular testing | Continued social distancing | Everyone required to wear facemasks | Regular sterilization at places I go to | Everyone required to wear facemasks | Continued social distancing |
| 3 | National restrictions lifted | Regular sterilization at places I go to | Regular sterilization at places I go to | Continued social distancing | Regular testing | Vaccinations | Vaccinations |

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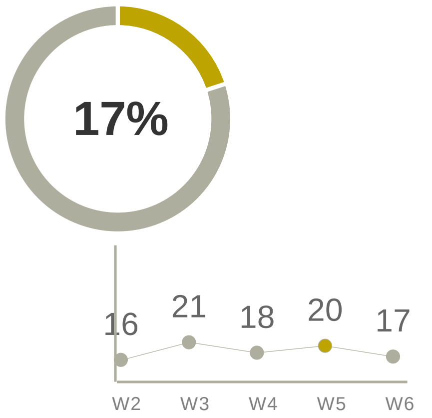
COVID-19

Q54: Which of the following would need to happen for you to feel safe to return to normal daily life?
Top 3 answers per market

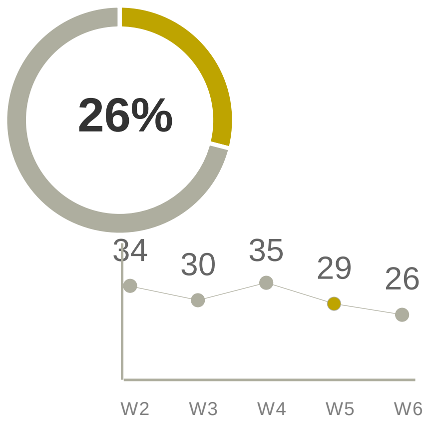
# 1.2
# Impact on income & employment

# The Dutch feel more confident about their financial future: those who have not been financially impacted by the coronavirus yet, increasingly do also not expect this for the future. Roughly one in four Dutch however remain insecure about future impact of the corona crisis on their household income

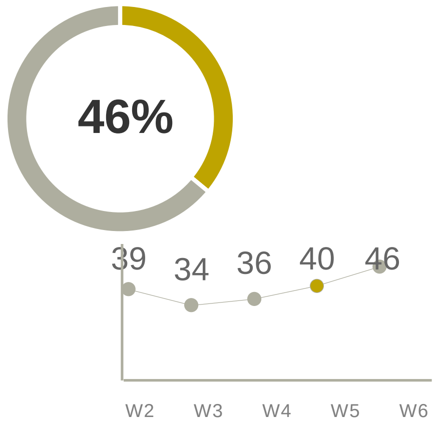
Financial impact of COVID-19




*COVID-19 **has already** impacted my household income*




*COVID-19 has **not yet** impacted my household income **but I expect it to in the future***



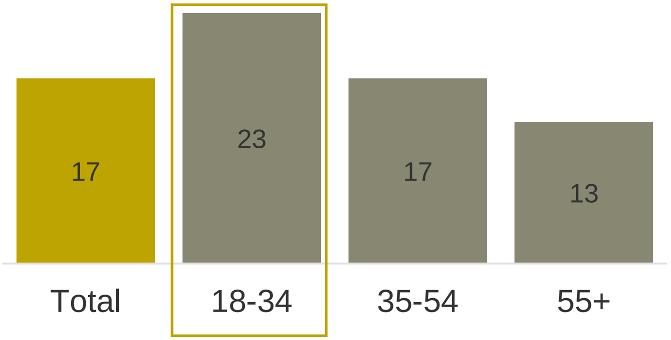

*COVID-19 **will have no impact** on my household income*



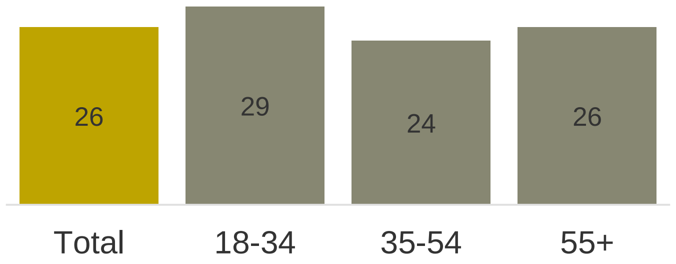
Q: has COVID-19 impacted your household income? Multiple choice question

# The financial impact of the corona crisis is highest for the youngest age group. Almost a quarter of them indicate that COVID-19 has already impacted their household income, compared to 13% for the oldest age group. Additionally, about one in three 18-34 yo expect their income to be impacted in the future

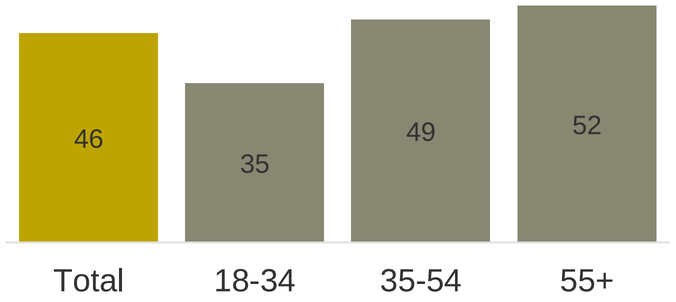
*COVID-19* ***has already*** *impacted my household income*




*COVID-19 has* ***not yet*** *impacted my household income* ***but I expect it to in the future***




*COVID-19* ***will have no impact*** *on my household income*

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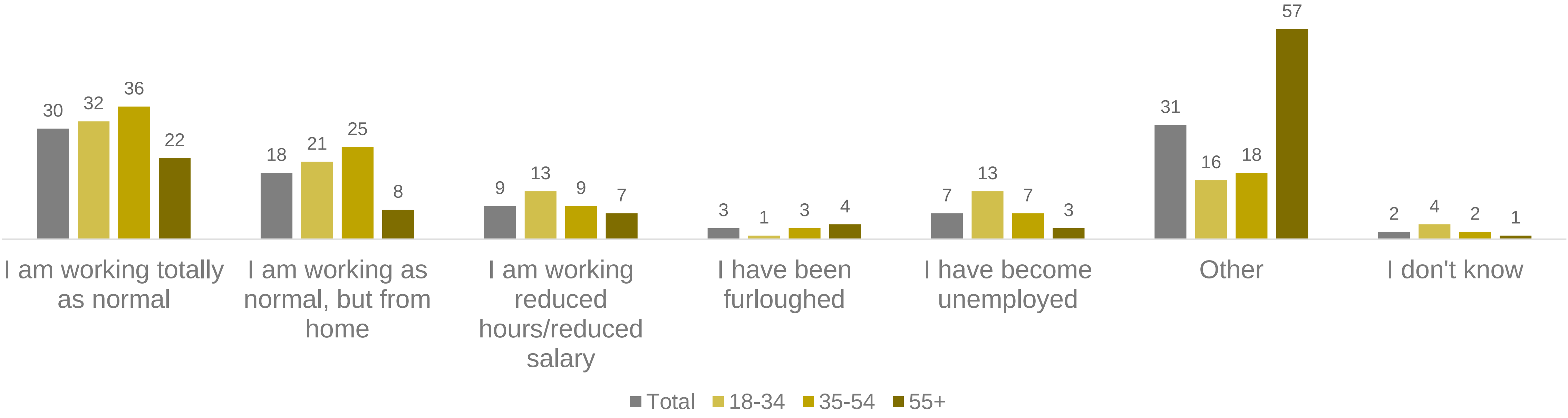
Q: has COVID-19 impacted your household income? Multiple choice question

# 30% of the Dutch work totally as normal and 18% works normal but from home. Age group 35-54 works most like they did before, and also work most from home. Age group 18-34 is most impacted; they relatively often work on reduced hours/salary and have relatively often become unemployed

How has the Coronavirus epidemic impacted your employment?

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Q60: How has the Coronavirus epidemic impacted your employment?

# Stage of life, age and employment have a strong influence on how worried people are about their future. Younger generations generally feel high uncertainty vs. older generations have certainty

*“The chance of getting a job is smaller. Cutbacks are at every company. I myself have trouble finding work at the moment.”*
***Male, 18-24, living with parents***

*“My generation is facing enormous problems. The environmental crisis, fewer jobs available as a result of corona, the financing of the consequences of corona, student debts, the student debts that will eventually lock the housing market. Tough times are coming and my generation has to solve all those problems. I see my generation as a neglected child.”*
***Female, 18-24, living alone***

*“I have a temporary contract. And I feel uncertain, because it may be that I lost my job at the end of the year.”*
***Male, 25-34, couple***

*“Vulnerable people like me are deteriorating rapidly due to loneliness and fear.”* ***Female, 55+ living alone***

*“I have not finished studying so I still have enough time for self-development. I would like to work as teacher and so I don’t think that’s a sector suffering a lot from the crisis.”*
***Female, 18-24, living alone***

*“I want to become a nurse and healthcare always needs personnel.“*
***Female, 18-24, living with parents***

*“I have a permanent job, a house and enough money. Moreover, me and my family are healthy.”*
***Male, 35-44, couple with children***

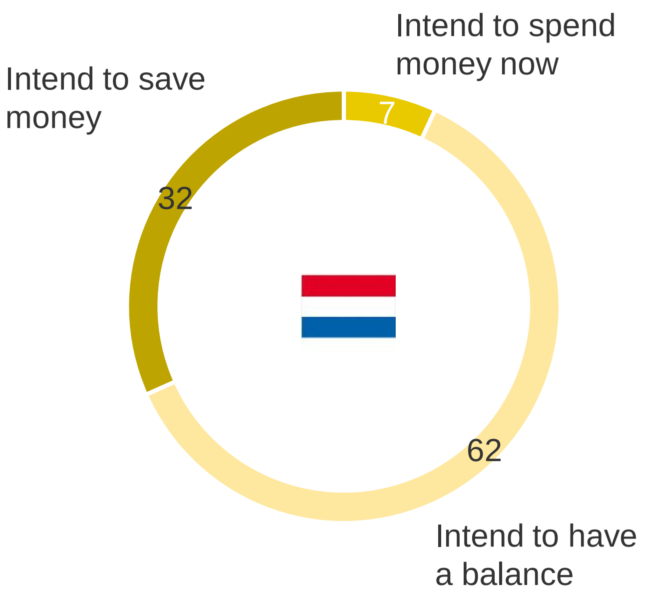
*“I don't worry about that. For everything there’s a solution, when you really want and keep pushing.“*
***Female, 35-44, couple with children***

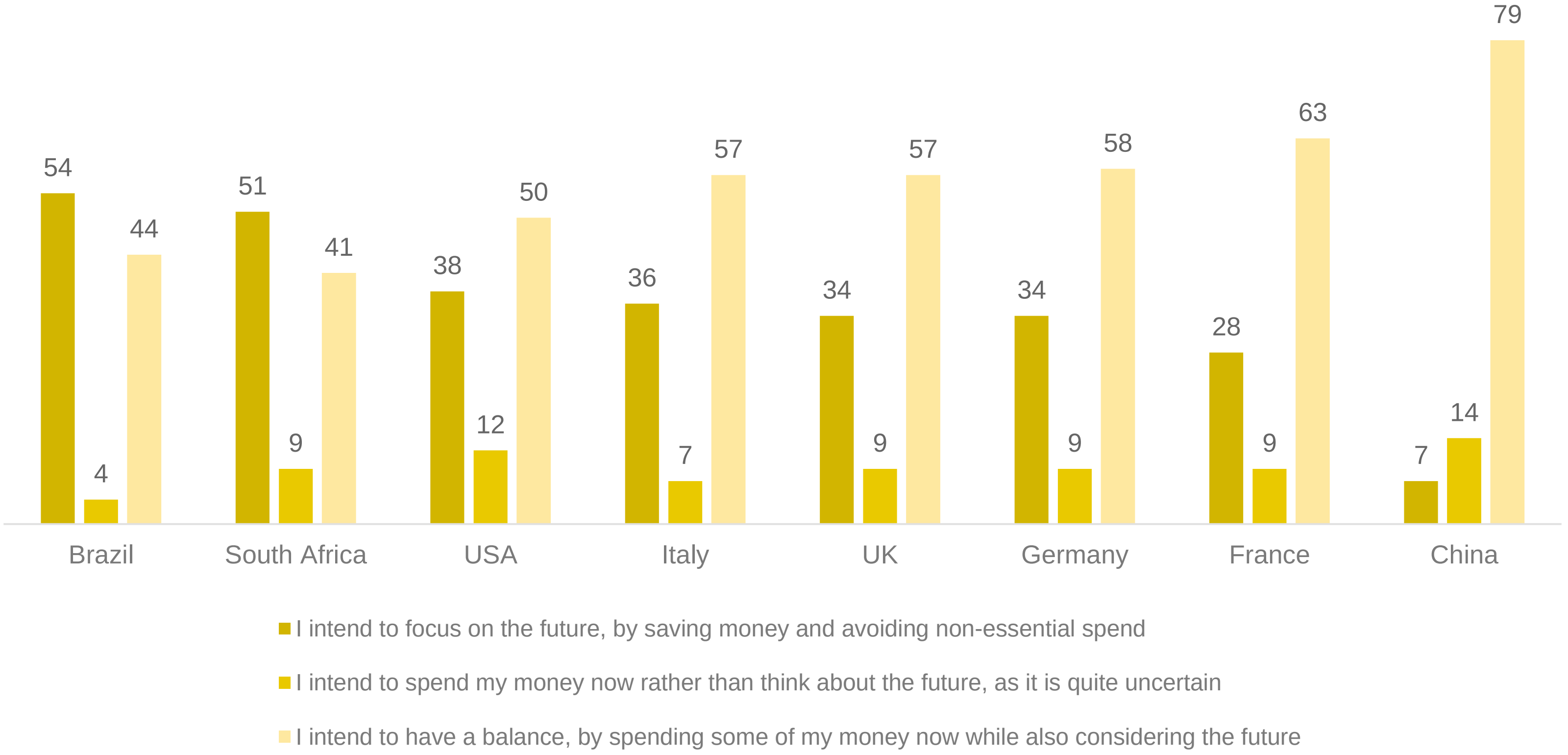
# Impact on (un)employment is highest in South Africa and lowest in China. Despite a relatively high unemployment due to corona in Brazil, also a strikingly high proportion of people work as normal or as normal but from home


KANTAR BARO-METER NL COVID-19

Q60: How has the Coronavirus epidemic impacted your employment?

# Markets hit hardest by the crisis in terms of (loss of) household income and jobs focus most on the future by saving money and avoiding non-essential spend

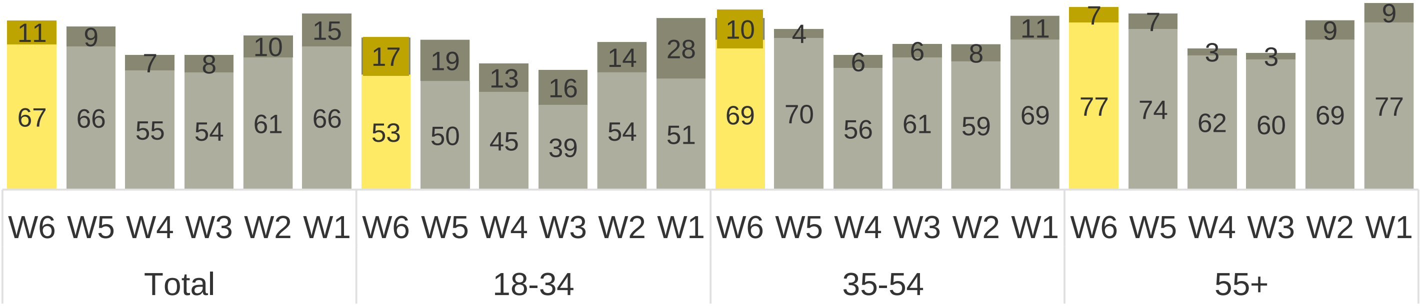


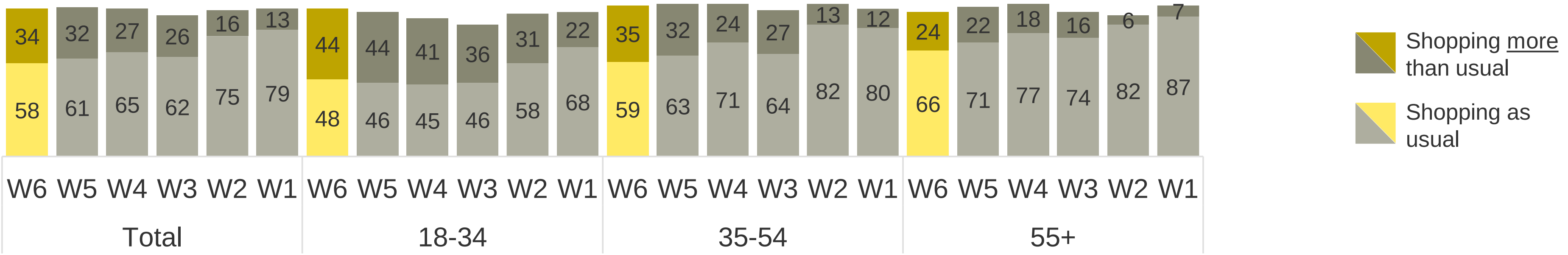
# 2
# Shopping Behaviours

# More than one in three Dutch continues to shop more at online e-commerce websites than usual. This is even 44% for the group 18-34 yo. The group 35-54 yo seems to feel more comfortable going back to physical outlets

## Shopping at physical outlets




## Shopping at online e-commerce websites

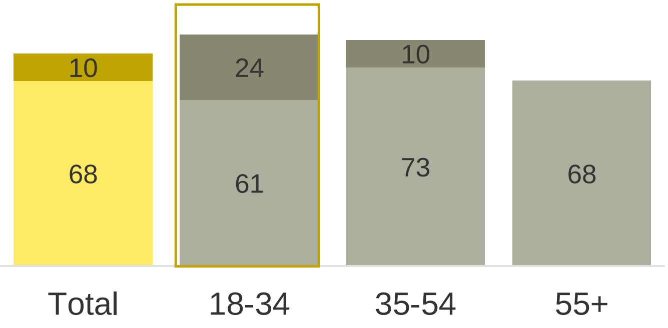




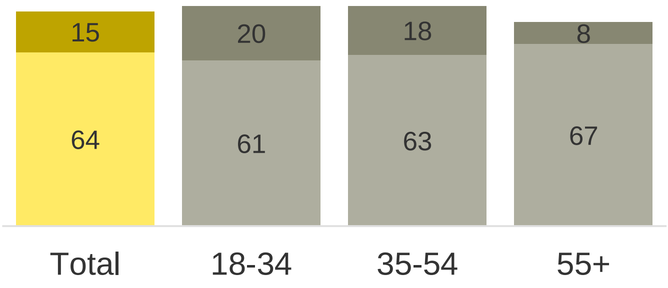

Q4: Overall, how has the coronavirus situation impacted your shopping across channels, in comparison to last month? Physical vs Online outlets; increase vs stayed the same

# The current situation has positively impacted shopping at all below channels, but the overall positive impact is highest for meal delivery and take-away. There is a clear age difference, with almost no increase for age group 55+

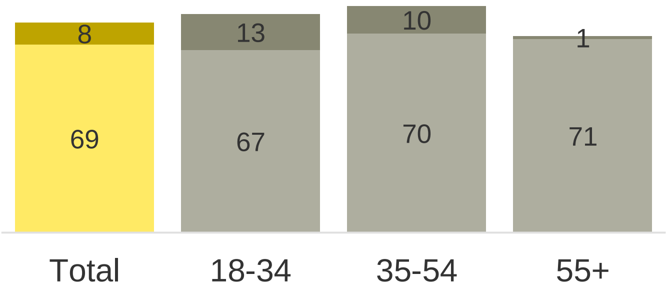
Shopping with direct delivery at home after ordering by phone



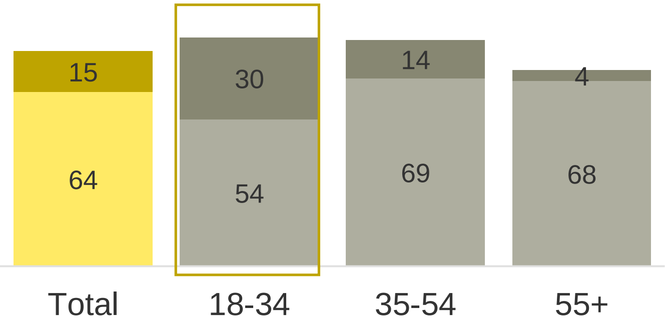

Ordering meal take-away directly from restaurant



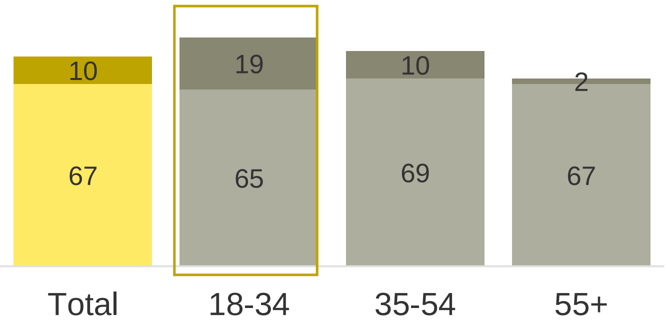

Curb-side pick-up / click-and-collect from non-food stores




Ordering meal delivery via app




Curb-side pick-up / click-and-collect from supermarkets



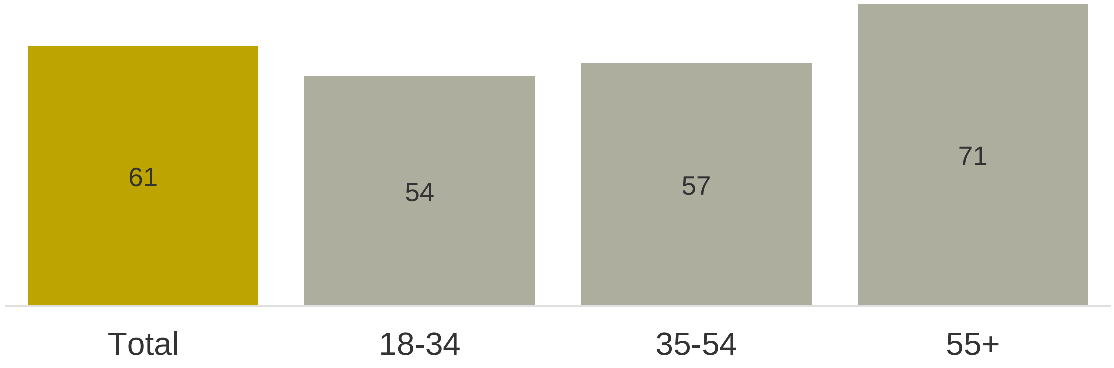

Shopping more than usual

Shopping as usual

Q4: Overall, how has the coronavirus situation impacted your shopping across channels, in comparison to last month?

# A majority of the Dutch find that, with the COVID-19 situation, shopping at local stores is important for the community. This sentiment is highest in the older age group (55+)

Shopping at local stores is important for the community





*Advertisements from Social Deal in NL to support local stores*



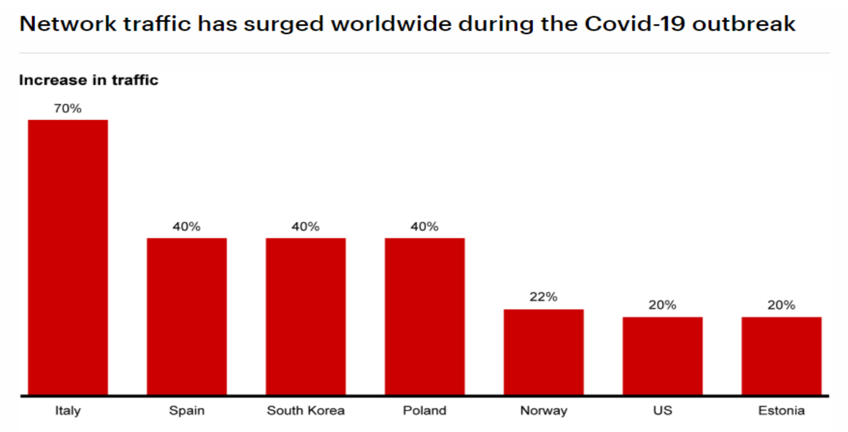
Q45_07: with the COVID-19 situation, shopping at local stores is important for the community. Top2 answers ((completely) agree)

# 3
# Impact of COVID19 on Customer Experience in telecom and shopping

# The increased importance of telecom providers, provides new opportunities

## Telecom

The increase in working from home and generally being more at home made people more dependent on internet and telephone connections.




Source: Bain & Company

*And now the question is: How do customers experience the service from their Telecom provider during the past months?*

## Customer experience in the 1,5 meter society

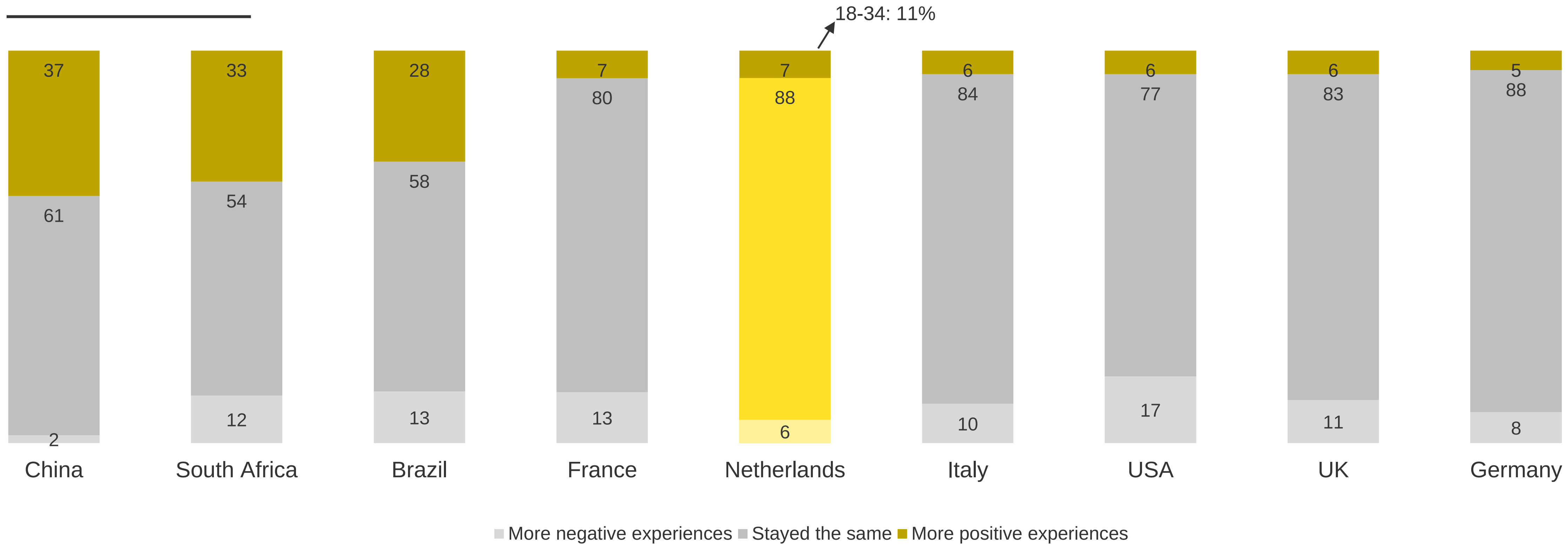
Going alone, washing your hands, using walking routes, waiting outside, minding distance, afraid to touch products; COVID changed the way we shop in physical stores drastically. It is however likely those restrictions will stay for a while.

*How do consumers experience this new way of shopping and what can we learn?*

# The importance of telecom services have increased, but perception of experience varies widely across countries

Even though NL customers indicate experiences stayed the same during the crisis, we often saw NPS scores* rise.

“Thinking about your main Telecom provider, how have your experiences as a customer changed during the crisis?”

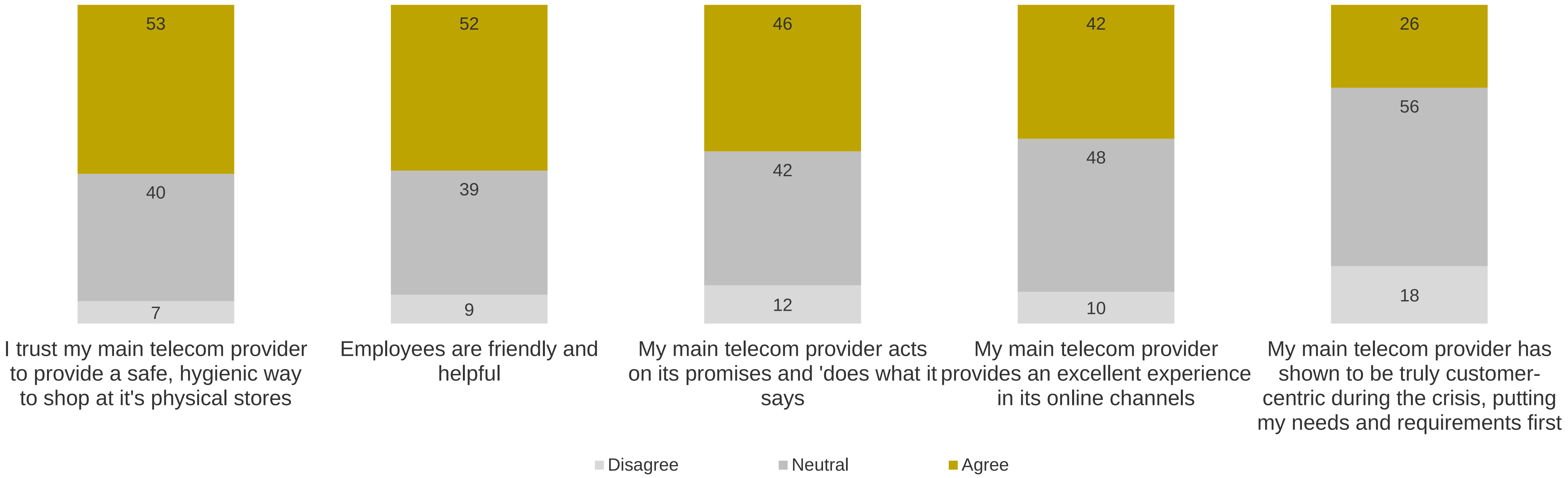





Q47: Again, thinking about your telecom provider, how have your experiences as a customer changed during the crisis? * Source: separate research, not the barometer

# Customers value the service of telecom providers during the Covid-19 crisis, but this does not mean that telecom providers are perceived as truly customer centric now

This is a long-term opportunity for the telecom industry: show your added value to customers and make them feel you put their needs first




Q55: Thinking about your main telecom provider, do you agree or disagree with the following statements?

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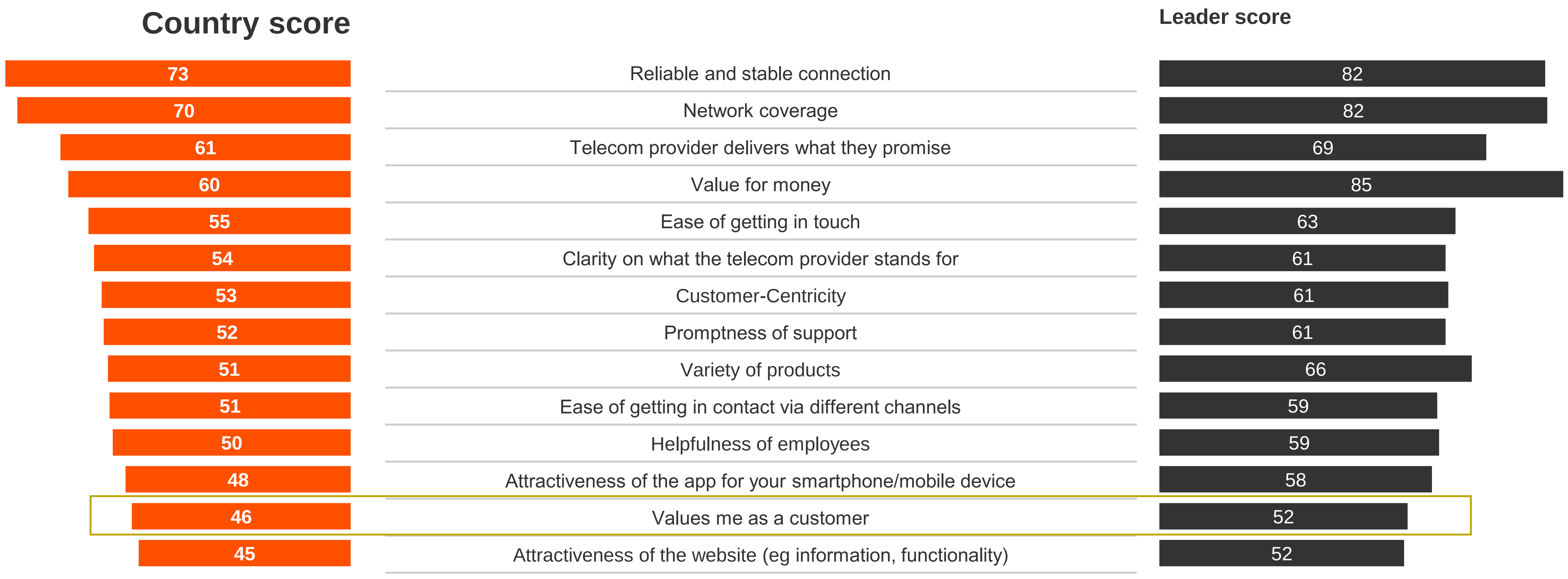
# Dutch Telecom providers have the basics of their products and services right, but customers do not feel very valued

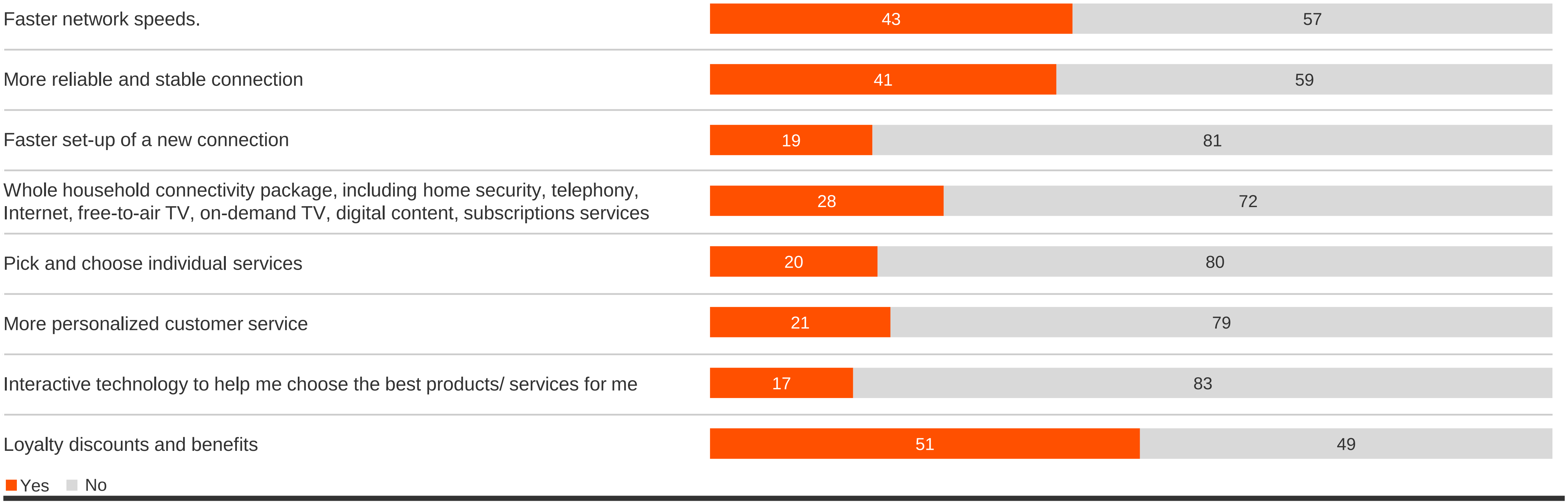
This is the perfect time to show your customers not only the excellent basics, but also the added value: telecom is more important than ever and NPS and satisfaction scores show positive trends. Also note the large gap for ‘’value for money’’.




CX+ 2020, Netherlands
Please select which network service provider you feel deliver an excellent performance on the following aspects. (percentage of mentions)

# Customers expect the basics to be right (network speed, reliable connection), but you can make a real difference by focussing on aspects less mentioned like more personalized service and (loyalty) offers

Understand the needs and requirements of your customers and put these in first place with a more personalised approach (Brand specific recommendations available in Kantar's CX+ reports)

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CX+ 2020, Global
What would make your network service provider more engaging or desirable? Please select all that apply (percentage of mentions)

Customer experience in the 1,5 meter society

# Due to corona regulations, ‘Fun shopping’ no longer exists. Shopping comes with unjoyful and uncomfortable feelings that take away the fun aspect

‘Funshopping’ was more than an experience of carefree buying and trying-on clothes--above all, it was a social activity.

Altough people initially were excited to go shopping again, but mostly experience negative aspects during the shopping moment itself:

- Feeling agitated that others do not keep their distance.
- Queuing before entering the store lowers the aspect of fun and contributes to an uncomfortable feeling.
- More stressful and unjoyful moments in store by obeying the walking routes and having to be constantly of keeping distance.

*“Uncomfortable, sometimes it is very busy and I don't want to be there. A lot of people just push through and ignore the 1.5 m rule ”*
***Female, 18-24, living with parents***

*“It feels sometimes strange because you have to queue outside. That takes away the fun aspect off it”*
***Female, 35-44, couple***

*“It’s frustrating. You have to wait before entering and when you are instore it often happens that people run around like a headless chicken. They do not care for distance and I am forced to slalom”*
***Female, 25-34, single parent***

*“It isn’t nice. You are required to do things that are not normal. The feeling of a nice getaway is gone. ”*
***Male, 18-24, living with parents***

# Negative shopping experiences contribute to postponing and visiting stores only for necessary products; online buying becomes more popular

*Based on these negative experiences, what is their next intended behaviour?*

- People go home and come back when streets and shops are less crowded.
- Only buying products that are really necessary.
- Postponing their ‘fun shopping’ and trying again when the lockdown is more flexible, or over.
- Going home and buy online, especially within the age cohort of **18-34**.

Based on these findings - and the outlook that the lockdown is continuing - people expect to buy more online as ever before. They think ‘fun shopping’ can be replaced by buying online and complemented by other activities that bring fun.

Online vendors offer quick delivery, combined with a flexible low-effort return policy and the absence of delivery and return costs.

*"Last weekend it was so packed that I actually quit and went home early."*
***Female, 35-44,  living alone***

*“When I see that it is busy, I will come back later”*
***Male, 55+, couple***

*“Now I have experienced I will focus on buying products I need and stop strolling around. In better times I will do stroll again.”*
***Female, 45-55, couple with children***

*“It is too busy, so I don't go anymore and almost everything can be bought online.”*
***Female, 25-34, couple***

*“It’s more complicated, so I only go for the things I need and cannot order online."*
***Female, 18-24, living alone***

# 4
# What are the implications for brands and advertising?

Kantar created a segmentation to identify groups of similar behaviours and attitudes towards COVID-19.

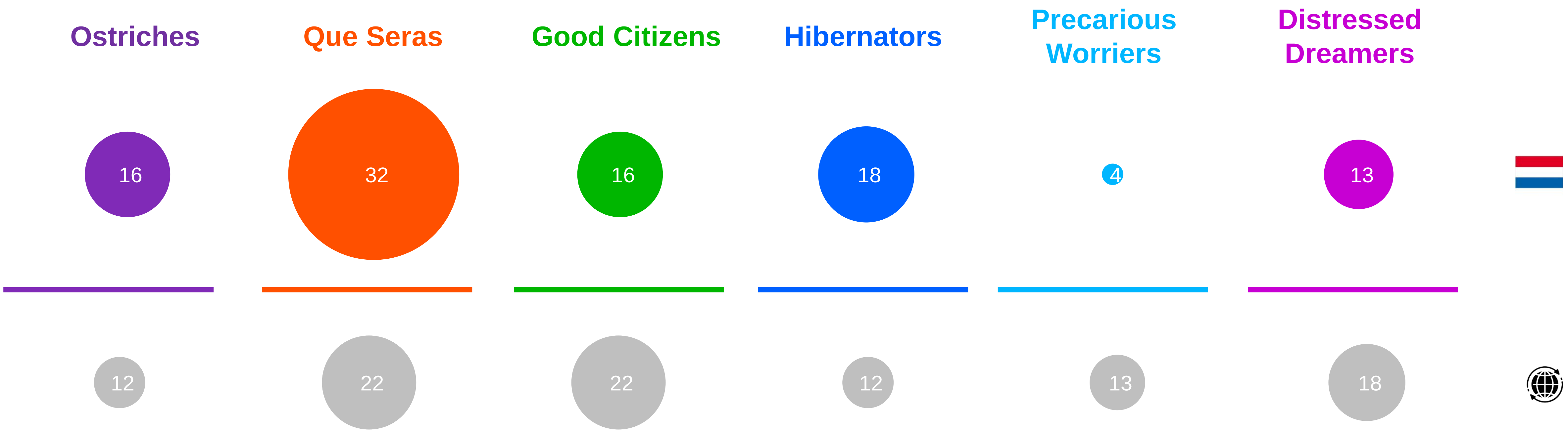
These behaviours and attitudes influence what consumers need from brands and advertising

# Meet our six global TRIBES.

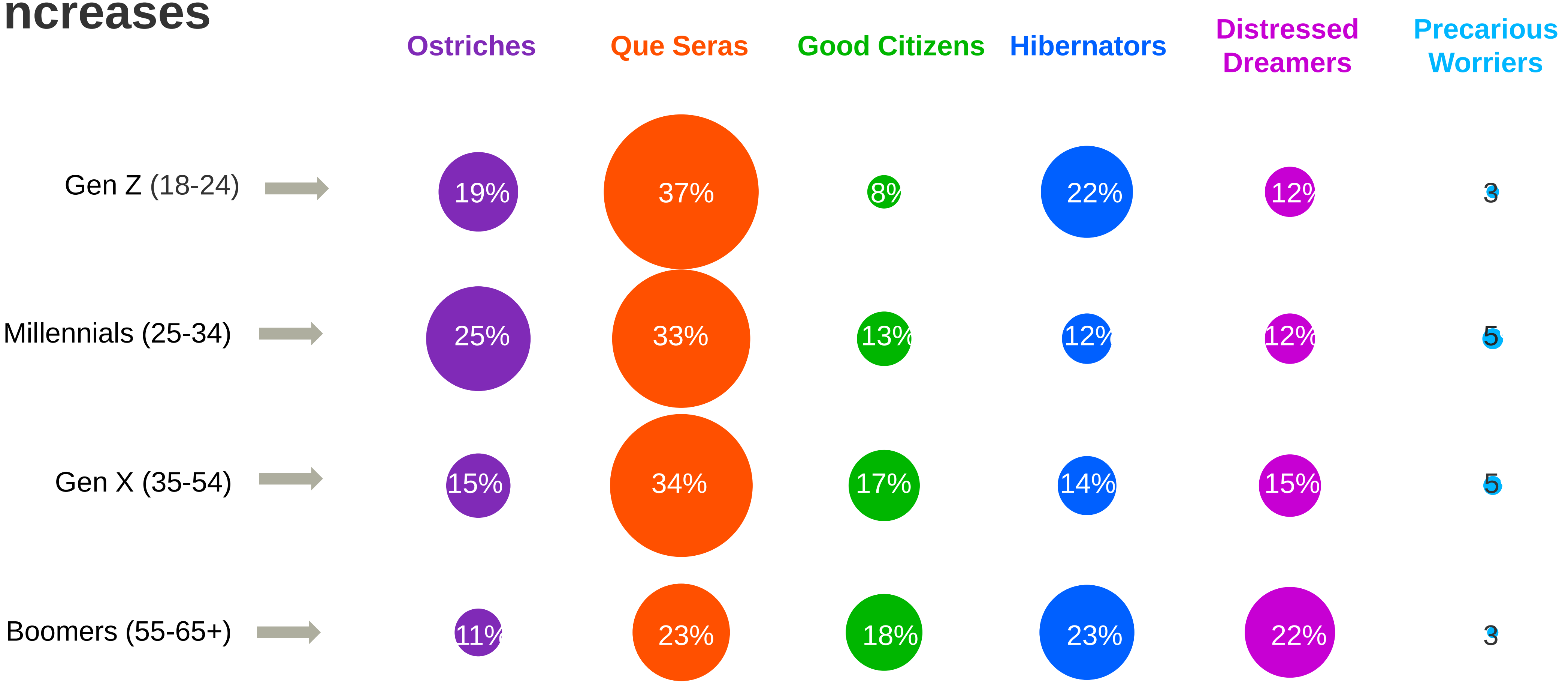
| | Ostriches | Que Seras | Hibernators | Good Citizens | Distressed Dreamers | Precarious Worriers |
|---|---|---|---|---|---|---|
| | 12 | 22 | 12 | 22 | 18 | 13 |
| | *I just don't see what the fuss is about. And I don't really care either.* | *I am pretty chilled. I think all the rules are a bit excessive. "Whatever will be, will be…" ** | *I accept the situation, and don't need to be updated constantly* | *I want to be informed and I think if we all adhere to the rules we should be fine* | *I am really concerned about my health and financial situation, but do believe things will get better* | *This is really scary for me, wish the government would do more..* |

| | Ostriches | Que Seras | Hibernators | Good Citizens | Distressed Dreamers | Precarious Worriers |
|---|---|---|---|---|---|---|
| Informed | ✗ | ✗ | ✗ | ✓ | ✓ | ✓ |
| Worried | ✗ | | | | ✓ | ✓ |
| Follow the rules | ✗ | ✗ | ✓ | ✓ | ✓ | ✓ |
| Trust | | | | | ✓ | ✗ |

# Compared to global, the Netherlands has a relatively large group of Que Seras and a very small group of precarious worriers



# Comparing generations, there are clear differences. Gen Z has a relatively large group of Que Seras, Millennials have a relatively large group of Ostriches. The proportion of Good Citizens and Distressed Dreamers increases as age increases

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# These differences between age groups is also confirmed by qualitative answers. People within the 18-44 age group have a more relaxed attitude towards the less stringent regulations than at the beginning of the lockdown. People aged 45+ show more adherence to the guidelines

- **45-54** and **55+** year-olds stick to the rules. The older they are, the more adherence to the guidelines. Both age cohorts actively observe the streets when they go out, avoid crowds and make a detour when others approach. They claim to wear mouth protection, certainly when prescribed.
- It appears that **25-44 year-olds** have a relaxed attitude and only stick to the rules when it's not too difficult. Mouth protection is compulsory in certain settings but "it's hard" and "*sometimes I forget.*" they keep their distance when it's easy to do so. Within this age group there's more mention of going out, having social gatherings and sports; this may explain why social distancing is harder for them, because they engage more in "difficult" situations.
- Among **18-24 year-olds**, the person's character determines the attitude and behaviour. Some still adhere to the preventative rules, while others have shifted to a much more relaxed routine.

"Even though the rules have been loosened considerably, I still think we need to be careful. So I avoid crowds and public transport." **Male, 55+, living alone**

"I use public transport but you need to wear mouth protection. I'm ambivalent about that. It only helps up to a certain extent." **Male, 45-54, living alone**

"I can grab a pint again on a terrace. Mostly I keep 1.5 meters distance, if the situation allows for that. I feel much more relaxed now." **Male, 35-44, couple with children**

"I've become more relaxed in hosting a small party. In all honesty, no need to be so strict in social distancing, as long as you wash your hands." **Female, 35-44, couple**

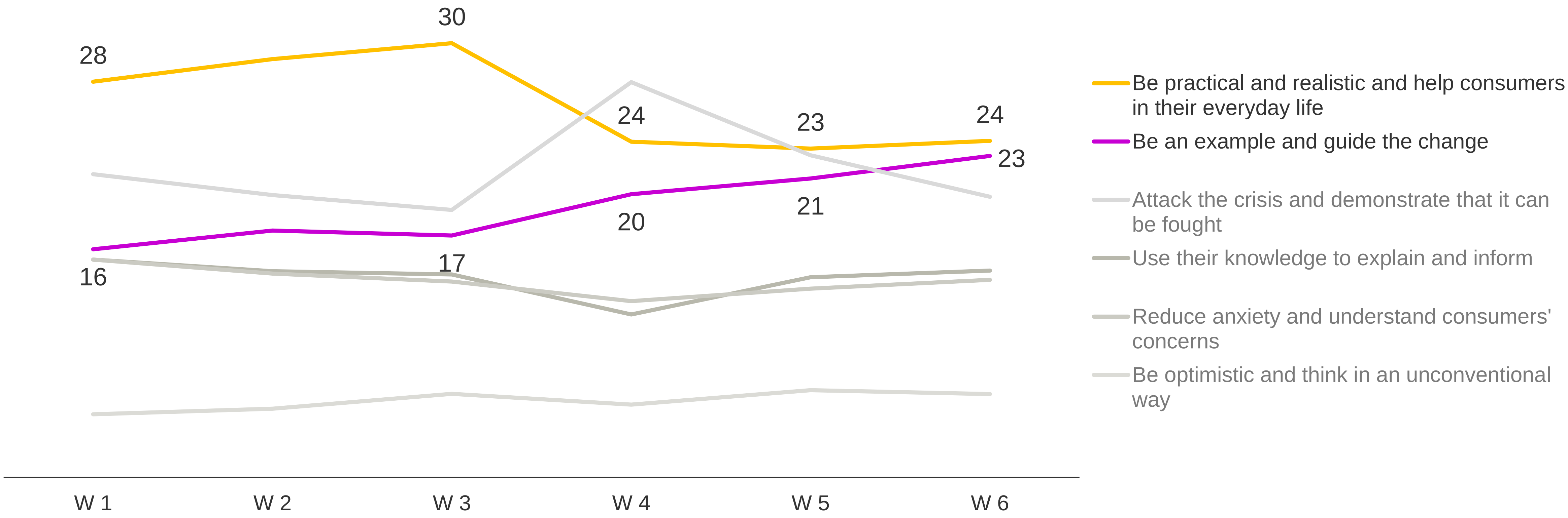
"I visit relatives again. I also hug my granny. She needs it, I need it. Feels good. You need to let go at one point, right." **Female, 18-24, couple**

# Looking at segments and gender, Hibernators are much more likely to be women. The Ostriches however, are more often men.

| | ♂ | ♀ |
|---|---|---|
| Hibernators ➡ | 39% | 60% |
| Ostriches ➡ | 63% | 36% |

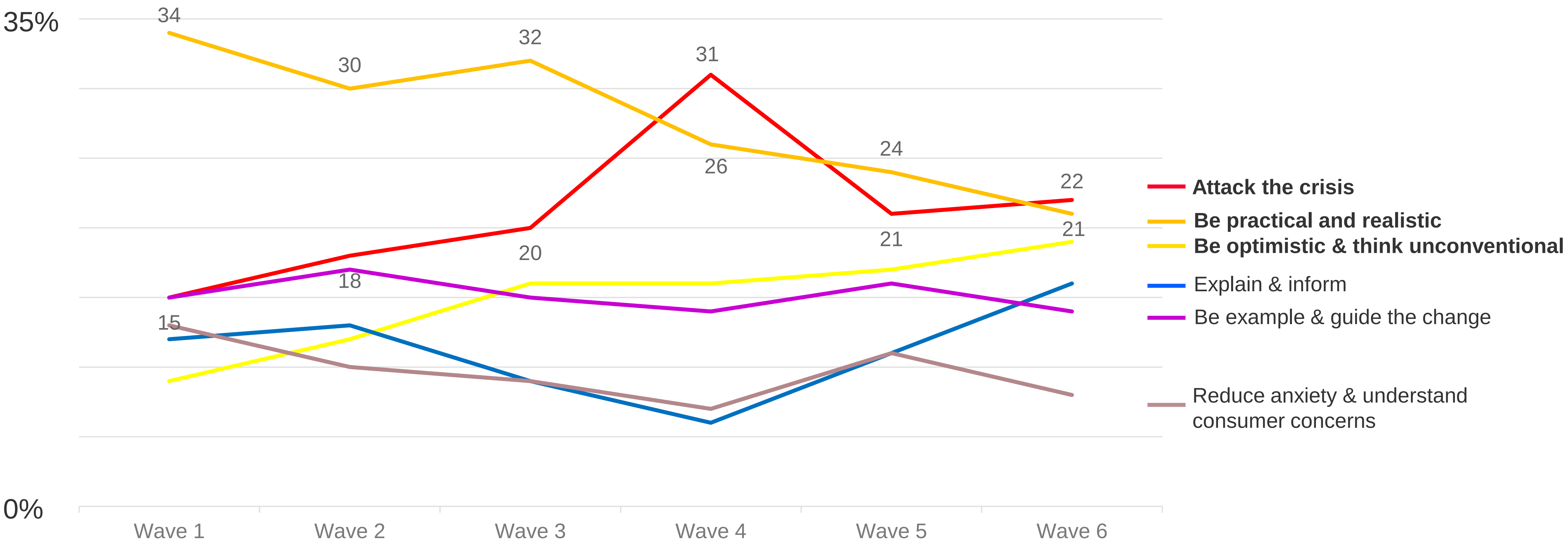
What do consumers expect from brands now and in the future?

# Globally it becomes increasingly expected of brands to step up and guide the change. Most consumers do not want brands to be optimistic and think in an unconventional way




Q3. What is the main thing brands should do at this moment? Global data

# The Dutch however increasingly expect brands to take a more positive and active role. In the Netherlands –contrary to most other markets- there is room for brands to be optimistic and think in an unconventional way

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Q3: What is the main thing that brands should do at the moment? What other actions should be taken? Choose one of the following

# Each segment however expects brands to step up in the way that fits their needs. Not surprisingly, Ostriches want brands to be optimistic, while Distressed Dreamers want to be informed

| | Ostriches (no idea what the fuss is about) | Que Seras (not all that bothered, all the fuss is a bit much) | Hibernators (accepting and not very engaged) | Good Citizens (accepting and engaged) | Distressed Dreamers (concerned but hopeful) | Precarious Worriers (very scared, engaged and need for more info) |
|---|---|---|---|---|---|---|
| Most important | Be optimistic and think in an unconventional way | Attack the crisis and demonstrate that it can be fought. | Be practical and realistic and help consumers in their everyday life | Attack the crisis and demonstrate that it can be fought | Use their knowledge to explain and inform | Group too small in NL |
| Over index | Reduce anxiety and understand consumers' concerns | Use their knowledge to explain and inform | Reduce anxiety and understand consumers' concerns | | Be an example and guide the change | |
| Under index | Attack the crisis and demonstrate that it can be fought. | | Be an example and guide the change & use their knowledge to explain and inform | Use their knowledge to explain and inform | Be optimistic and think in an unconventional way | |

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over/under index vs. total (over index >119, under index <81)

What do consumers expect from advertising?

# 59%

of the Dutch are happy with the **amount** of advertising they see…

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# But there are opposing views on whether the lockdown restrictions should continue to be part of commercials; some agree, some don't

*"Not everything has to be about the lockdown, we will have to go back to society and use some cheerful advertisements."*
***Female,18-24, living with parents***

*"I am COVID-19 tired, there is more than that. Let's focus on that again. More positivity!"*
***Female, 35-44, couple with children***

*"You are constantly reminded that you have to keep 1.5 meters, no shaking hands etc. That is not pleasant. I get it by now. And am tired of this being advertised as "normal"."*
***Female, 25-34, couple***

*"Commercials should not respond to the current misery. Corona should not be a market."*
***Male, 25-34, couple***

*"Reminding people is not a problem, otherwise they could forget. These messages directly speaks to their behaviour."*
***Male, 25-34, living alone***

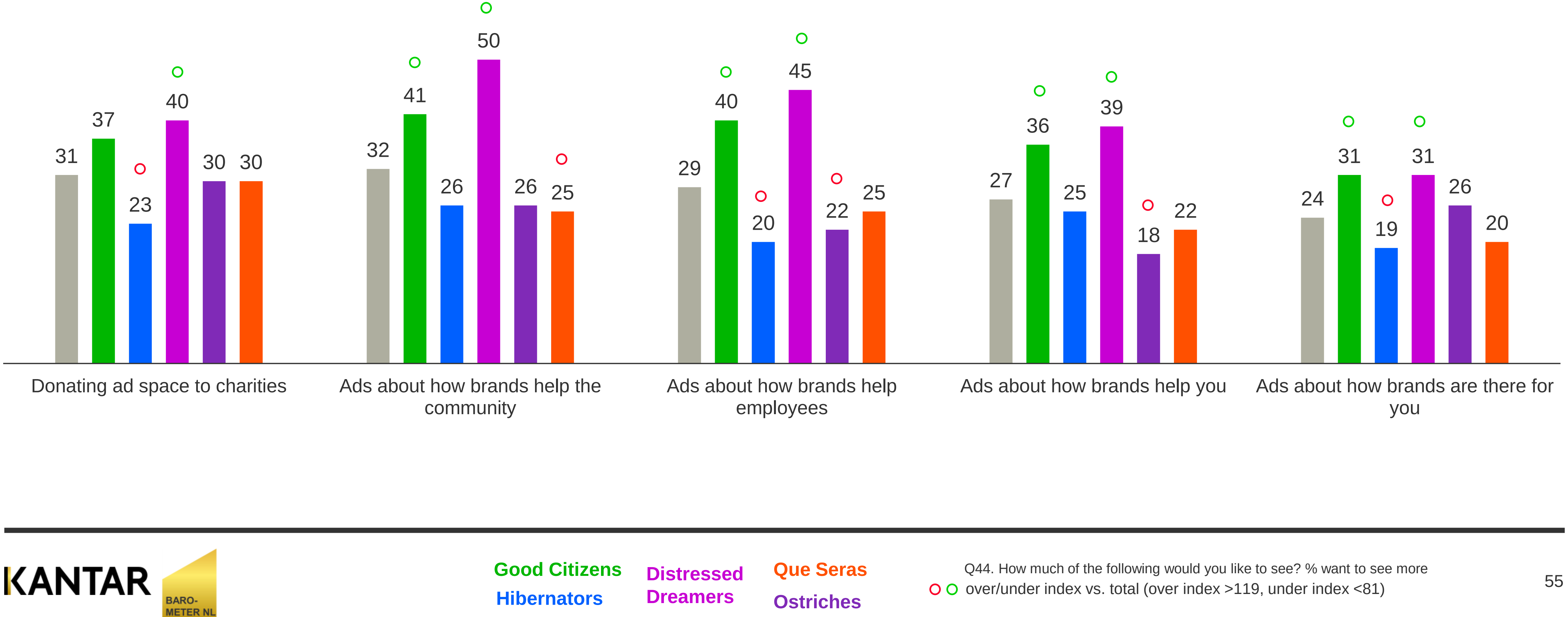
*"It is good to keep alerting people so that everyone stays sharp. The power of repetition."*
***Male, 35-44, couple with children***

*"Regular reminders of the situation in the world can never hurt, too much is not good, but in moderation."*
***Female, 35-44, couple with children***



Source: Kantar Chatbot study. n=162 "De beperkingen als onderdeel van de lockdown moeten geen onderdeel meer uitmaken van reclames." yes: 57%, no: 43%

# The Distressed Dreamers and Good Citizens -who both like to stay informed- are most open to seeing COVID-19 related ads. The Hibernators however a lot less so




Q44. How much of the following would you like to see? % want to see more
over/under index vs. total (over index >119, under index <81)

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What does this mean for brands?

# Based on the characteristics of the segments we can cluster TRIBES into strategic groups

Less worried

More worried

Constantly seeking updates

Seeking updates less frequently

## Able to adapt
(right circumstances)

**Good Citizens**

Resilient and have resources to cope with the situation

## Little behavioural change
(accept or stubborn)

**Hibernators**

Feel less empowered and accept the situation

**Que Seras**

Measures are all a bit exaggerated

**Ostriches**

Don’t take it all too seriously

## Overwhelmed
(poor mental wellbeing)

**Precarious Worriers**

Changing habits to mitigate (financial) risk

**Distressed Dreamers**

Stress provoking different habits

# These strategic groups can then be used to build a brand action framework

| | Ostriches | Que Seras | Precarious Worriers | Distressed Dreamers | Good Citizens | Hibernators |
|---|---|---|---|---|---|---|
| **Brand role** | **Challenge** | **Inspire** | **Guide** | **Support** | **Enable** | **Connect** |
| **Comms Strategy** | Give them an escape to normality: emotional freedom | Be optimistic and empowering: highlight fresh opportunities | Give practical tips and reassurance | Provide emotional support & incorporate clear facts | Celebrate progress achieved, and their role | Give practical tips and hope and light at the end of the tunnel |

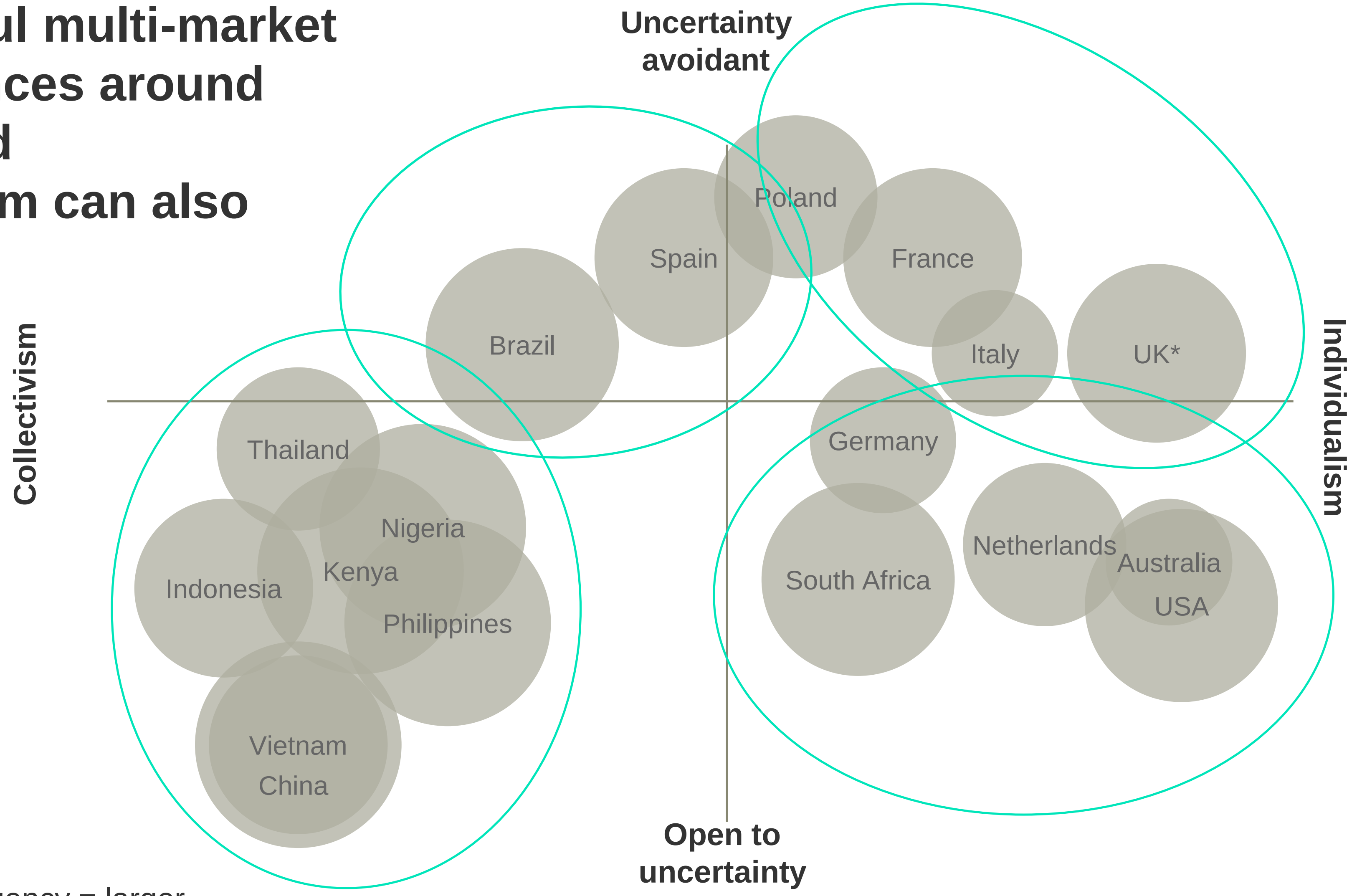
# The cultural context determines how categories and brands behave

Marketers use universal taglines and themes that are synonymous with their brand, but may not resonate across different cultures. The cultural context determines how categories and brands behave. It is therefore important to understand and interpret the cultural code. The cultural lens will give us a basis to understand the subtleties of individual cultures and how it ties in globally - and how the current crisis is therefore being expressed within our world at the moment, the human truths and language that define and shape the present and the future.

# Understanding local sentiments and needs is key for a successful multi-market strategy, as cultural differences around dealing with uncertainty and individualism vs. collectivism can also impact COVID19 responses

**Collectivism – Individualism**
Everything is about "I" versus everything is about "we"

**Uncertainty avoidance - openness**
Their avoidance of risk versus openness to change and uncertain situations




The sizes show the stringency level, higher stringency = larger



Source: https://www.hofstede-insights.com/product/compare-countries/
*UK was manually shifted towards uncertainty avoidant, rationale: *while the British are theoretically comfortable with ambiguous situations and uncertain futures, the pandemic has highlighted tensions between the culture of 'muddling along' and a need for certainty in crisis*

# Segment sizes differ by country groupings, indicating the importance of cultural context in understanding responses to the situation

| | Ostriches | Que Seras | Good Citizens | Hibernators | Precarious Worriers | Distressed Dreamers |
|---|---|---|---|---|---|---|
| **Collectivist countries, open to uncertainty**<br>Indonesia / China / Thailand / Vietnam / Kenya / Nigeria / Philippines | 10 | 19 | 31 | 7 | 11 | 22 |
| **Collectivist countries, uncertainty avoidant**<br>Brazil / Spain | 7 | 21 | 16 | 12 | 27 | 19 |
| **Individualist countries, uncertainty avoidant**<br>Poland / France / Italy / UK | 11 | 25 | 17 | 18 | 14 | 15 |
| **Individualist countries, open to uncertainty**<br>South Africa / Germany / Netherlands / Australia / USA | 16 | 24 | 19 | 15 | 10 | 16 |

# Summary: How the Kantar TRIBES can help you

## EMPATHISE

Understanding the differences between the COVID19 TRIBES helps you step in their shoes when it comes to **designing effective strategies.** Who are they? Get to know them (see also next page)

Empathy is the most powerful tool you have in driving action and winning in the new battleground.

## INSPIRE

Understanding each segment's relationship with your category & brand opens up new ways of adding value.

Profiles per market are a fast-track to more powerful marketing, customer experience, bringing innovation to market and guiding tone of voice in communications.

## FOCUS

Understanding each segment's unique behavioural dynamics with your category and brand helps you focus on value-driving initiatives.

This helps increase your ROI, at a time when every penny is under scrutiny.

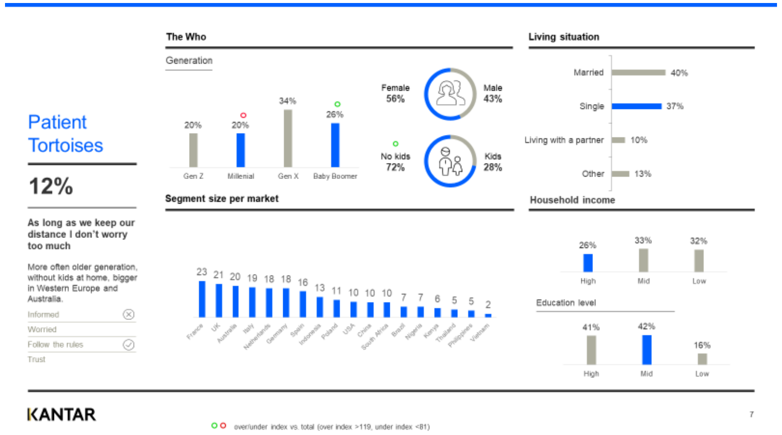
## TARGET

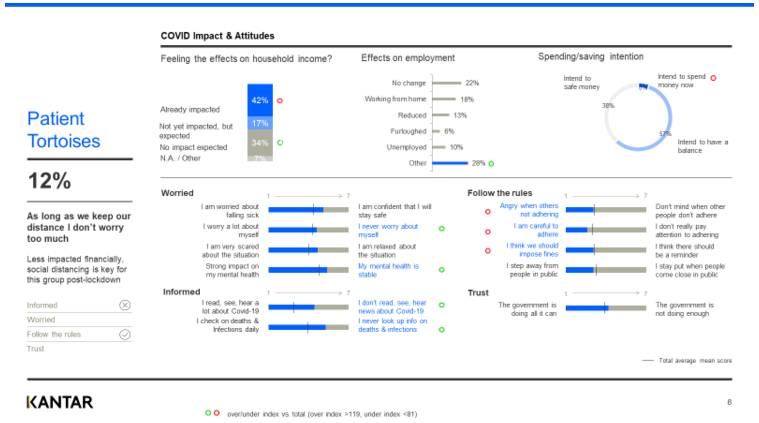
The COVID19 TRIBES can be overlaid or connected with your own data.

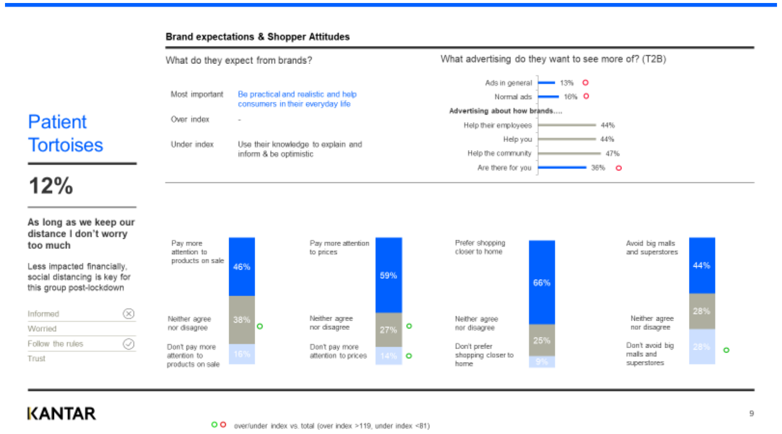
This adds a powerful dimension to your messaging.

# Get to know the COVID19 segments in more detail and understand each segment’s unique behavioural dynamics with your category and brand

## Pen portraits can help you design effective strategies




Who are they? Demographics

What’s the size of the segment per country?

Income impact

Attitudes about C19

Expectations from brands / advertising

Shopper habits

# 5
# Returning to our pre-covid lives

When do we feel ready to return to our pre-covid lives?

# The Dutch make considered choices about the places they want to visit again most quickly. In line with government regulations, a quarter likes to go shopping and go to the office, gym, a bar or a restaurant once it's allowed

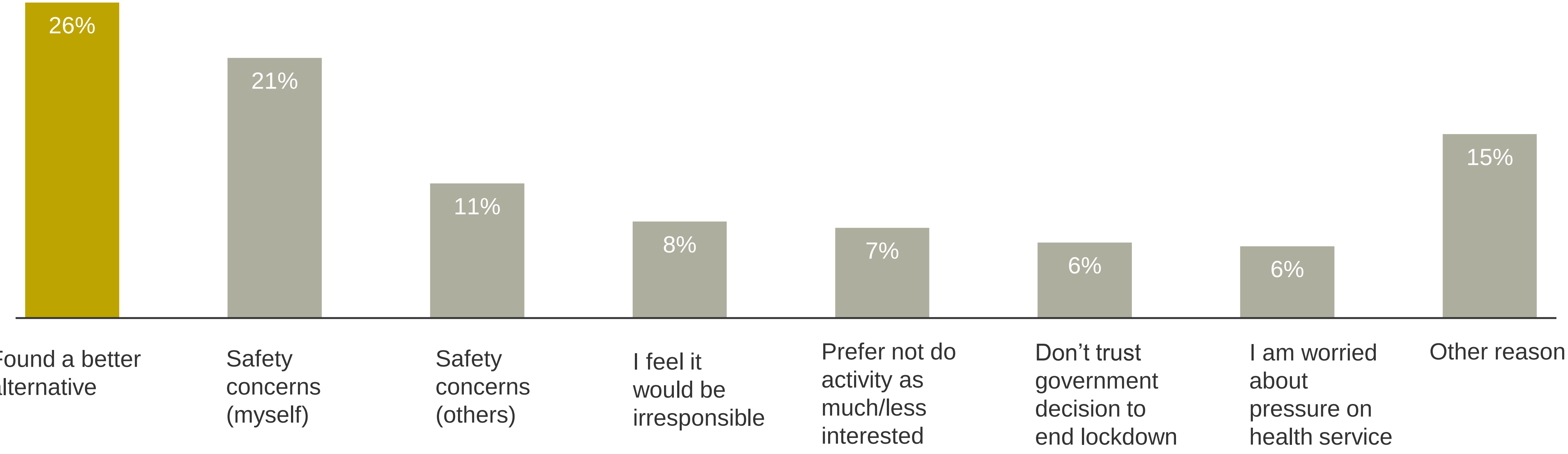
| | Return to an office | Vs. W5 | Go to a restaurant/bar | Vs. W5 | Shop for clothes, electronics, toys etc | Vs. W5 | Go to the gym | Vs. W5 |
|---|---|---|---|---|---|---|---|---|
| **As soon as possible** | **22%** | +4 | **25%** | +3 | **25%** | --1 | **20%** | +2 |
| **In 1 month's time** | 8% | -2 | 24% | 0 | 21% | 0 | 10% | +1 |
| **In 2-3 months' time** | 10% | +2 | 21% | +2 | 19% | +4 | 9% | +1 |
| **In 4-5 months' time** | 6% | +2 | 10% | 0 | 8% | 0 | 4% | +1 |
| **In more than 6 months' time** | 3% | 0 | 8% | +1 | 5% | -2 | 5% | 0 |
| **Don't know/ Not applicable** | 52% | -4 | 12% | +1 | 22% | +4 | 52% | -3 |



Q53: Assuming there were no longer any government restrictions, when would you feel comfortable doing the following?
Note: bold figures represent the highest percentages in each category without don't know/not applicable

# For people who like to wait a little longer before going back to the office, the main reason is that they found a better alternative. People seem to see the advantages of working from home

*"Because I now work at home full-time, I no longer suffer from traffic jams and other annoyances. When I have finished working, I am immediately at home and can be with my family"* ***Female, 35-44, single mother***






Q62_01: You said you would be looking to wait for a period of time before you were comfortable doing the following. Why?

# This does however differ between different people. People with office jobs, now experience a better work-life balance whereas for people with crucial jobs nothing really changed

*“Working at home gives me a lot more free time. Previously, I was always working or commuting.”*
***Male, 35-44, couple with children***

*“Working from home provides a very fine balance. Productivity is very high, and I have more private time. It’s a WIN-WIN.”*
***Male, 25-34, couple***

*“Yes, my free time is now sacred. More time for things at home and myself. I experience much more peace”*
***Male, 25-34 , couple***

*“I now spend more time with the family and find out that I have missed out a lot, so this kind of life is much better”*
***Female, 35-44, couple with children***

*“As a nurse I never sit at home. I could even say that my leisure time has become a lot less.”*
***Male, 18-24, couple with children***

*“Because we are almost only at home, the boundary between school / work and private / leisure time becomes much blurred“*
***Female, 18-24, living with parents***

*“I had to do just as much work and take care of 3 small children at the same time, so it is only heavier”*
***Female, 35-44, couple with children***

*“You can't do fun things. There is nothing to do because of the regulations.“*
***Female, 25-34, couple with children***

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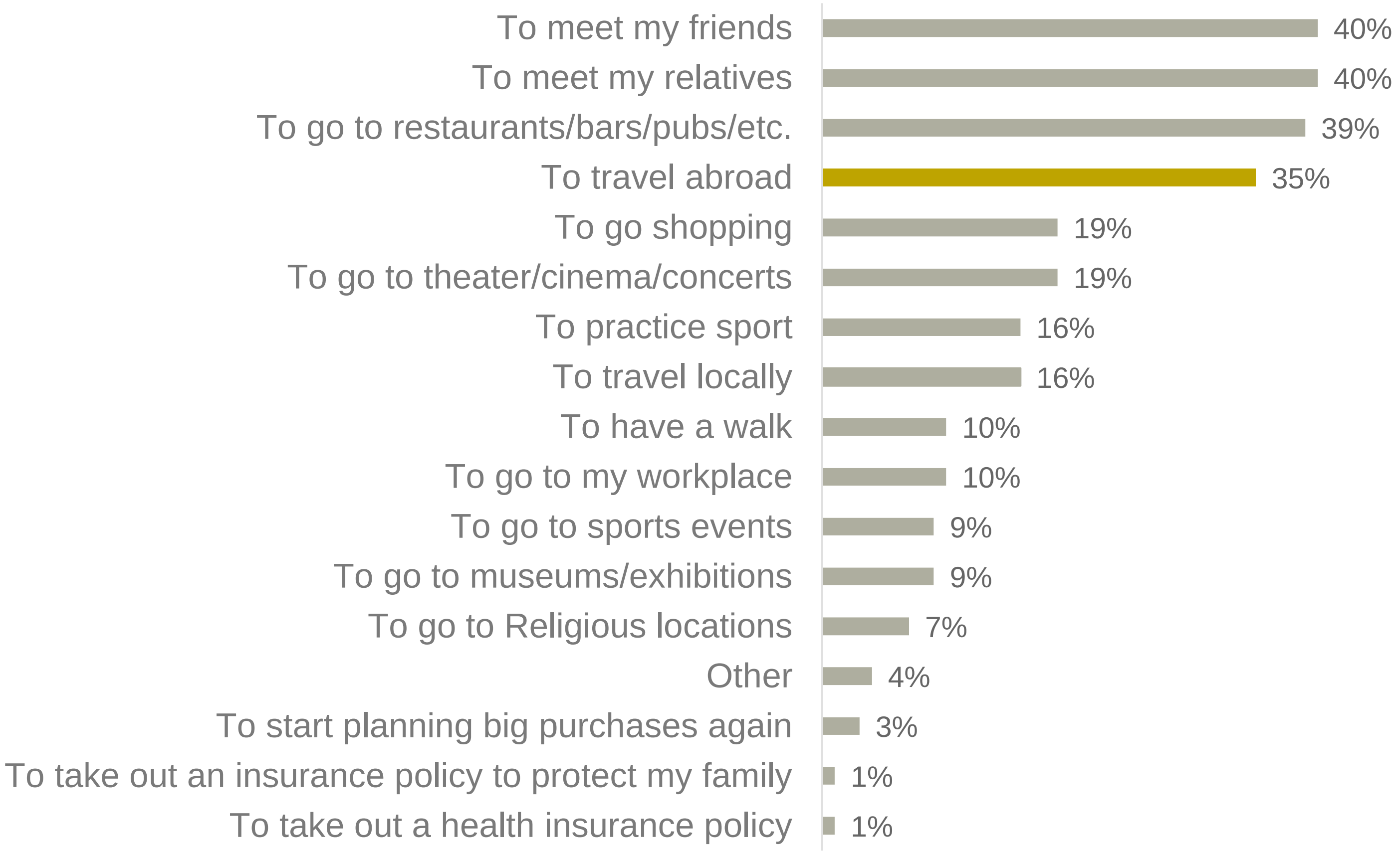
Source: Kantar Chatbot. N=99. (People with jobs) **"Ik vind dat ik een betere balans heb gevonden tussen vrije tijd en werk."** Yes: 42%, No: 58%

# Looking at what the Dutch most look forward to, travel abroad is high up the ranks right after meeting friends and relatives again and going to restaurants / bars

“Mostly looking forward to’’

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Q36: Which of the following activities are you most looking forward to doing once the COVID 19 pandemic subsides?

# However, not many feel comfortable to travel in the Netherlands or abroad very soon. Do note that 45% indicate that they would -assuming there were no longer any government restrictions- feel comfortable to travel abroad within the next six months

| | Travel in my own country | Vs. W5 | Travel abroad | Vs. W5 | Attending a large event | Vs. W5 |
|---|---|---|---|---|---|---|
| **As soon as possible** | 18% | +1 | 10% | -3 | 9% | 0 |
| **In 1 month's time** | 17% | +3 | 6% | +1 | 5% | -1 |
| **In 2-3 months' time** | **21%** | -3 | 16% | +1 | 12% | +3 |
| **In 4-5 months' time** | 13% | -3 | 13% | +1 | 11% | +1 |
| **In more than 6 months' time** | 8% | -3 | **29%** | +1 | **23%** | -2 |
| **Don't know/ Not applicable** | 23% | -1 | 26% | -1 | 40% | 0 |

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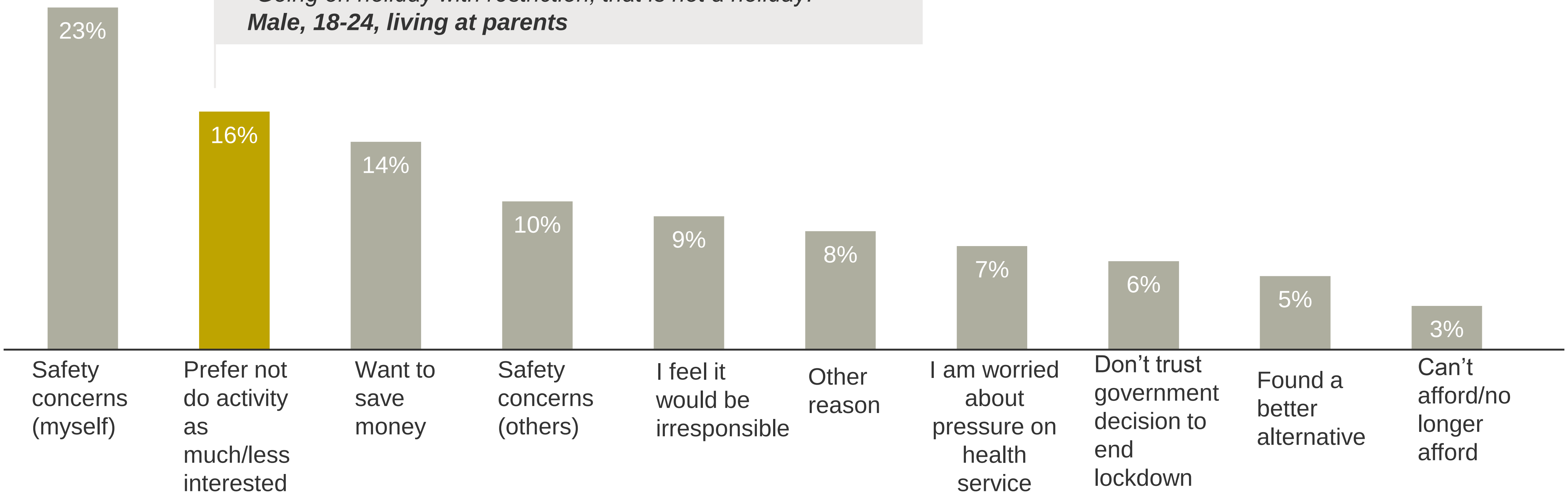
COVID-19

Q53: Assuming there were no longer any government restrictions, when would you feel comfortable doing the following?
Note: bold figures represent the highest percentages in each category without don't know/not applicable

# For those who like to wait a little longer to travel in The Netherlands, the main reason is safety concerns for themselves. Others fear they cannot fully enjoy activities due to remaining restrictions

*"Going on holiday with restriction, that is not a holiday!"*
***Male, 18-24, living at parents***




Q62: You said you would be looking to wait for a period of time before you were comfortable doing the following. Why?

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# Those who stay in the Netherlands or at home, like to stay in a safe environment. There's a fear across all ages that things in another country could change very quickly while on holiday

- People feel most secure to stay at home or go on holiday in their own country. They feel a certain sense of control over the virus in the Netherlands, which is shown to be under control.
- In other countries they lose this sense of control over the virus and how people will behave. For instance, they think the numbers of infections in other countries aren't reported as reliably as in the Netherlands. Consequently, travel abroad comes with a greater fear of getting infected. Additionally, people fear a country going in lockdown while there and not being able to return home.
- People aged 18 to 44 don't want to use their holidays with restrictions in place. Holidays are about freedom and being spontaneous, hence their enthusiasm to go on holiday is crushed with obligations and rules 'forced on them'.

*"I will go on daytrips in the Netherlands with my kids, I expect the parks where we will go, have taken the right precautions."*
***Male, 25-34, couple with children***

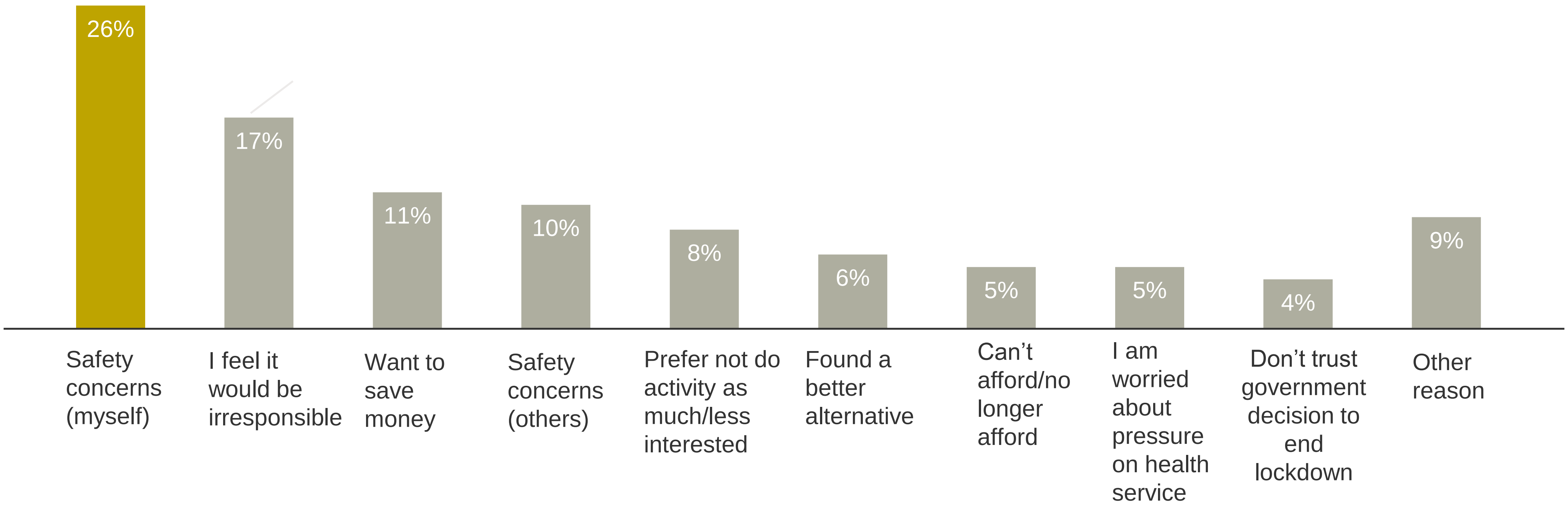
*"I am going to a camp site here in the Netherlands. Although I feel somewhat discouraged about adjusting to the rules but I really want to take a break."*
***Male, 25-34, couple***

*"We had plans to go to Japan, but we cancelled that trip. Now we are thinking of going to the 'Veluwe' in the Netherlands."*
***Male, 18-24, living alone***

*"I think the Netherlands is the safest place in the world right now. When the situation is more safe in other countries I would go on holiday perhaps."*
***Male, 18-24, living at parents***

# For those who'd like to wait a little longer before going on a holiday abroad, the main reason is that is feels unsafe. Also, some feel it would be irresponsible to travel abroad

*"I am afraid for my own health to go on holiday."*
***Male, 55+, living alone***




Q62_05: You said you would be looking to wait for a period of time before you were comfortable doing the following. Why?

# People that plan to go abroad for a holiday, prefer spending it with family or close friends in isolation

People mention going to Belgium and Germany. A couple of people mention France, Spain, or Italy as their destination. A few go outside Europe, mainly to Turkey. These are all countries that the average Dutch person has visited before, which builds on people’s tendency to avoid uncertainty.

People make the decision based on the current COVID-19 pandemic to stay away from big crowds.

Examples of this are:

- Renting a home or go out camping in the fresh air is mentioned a lot
- Spend holiday with family or close friends - no big groups of friends
- Plan to go abroad off season; in September

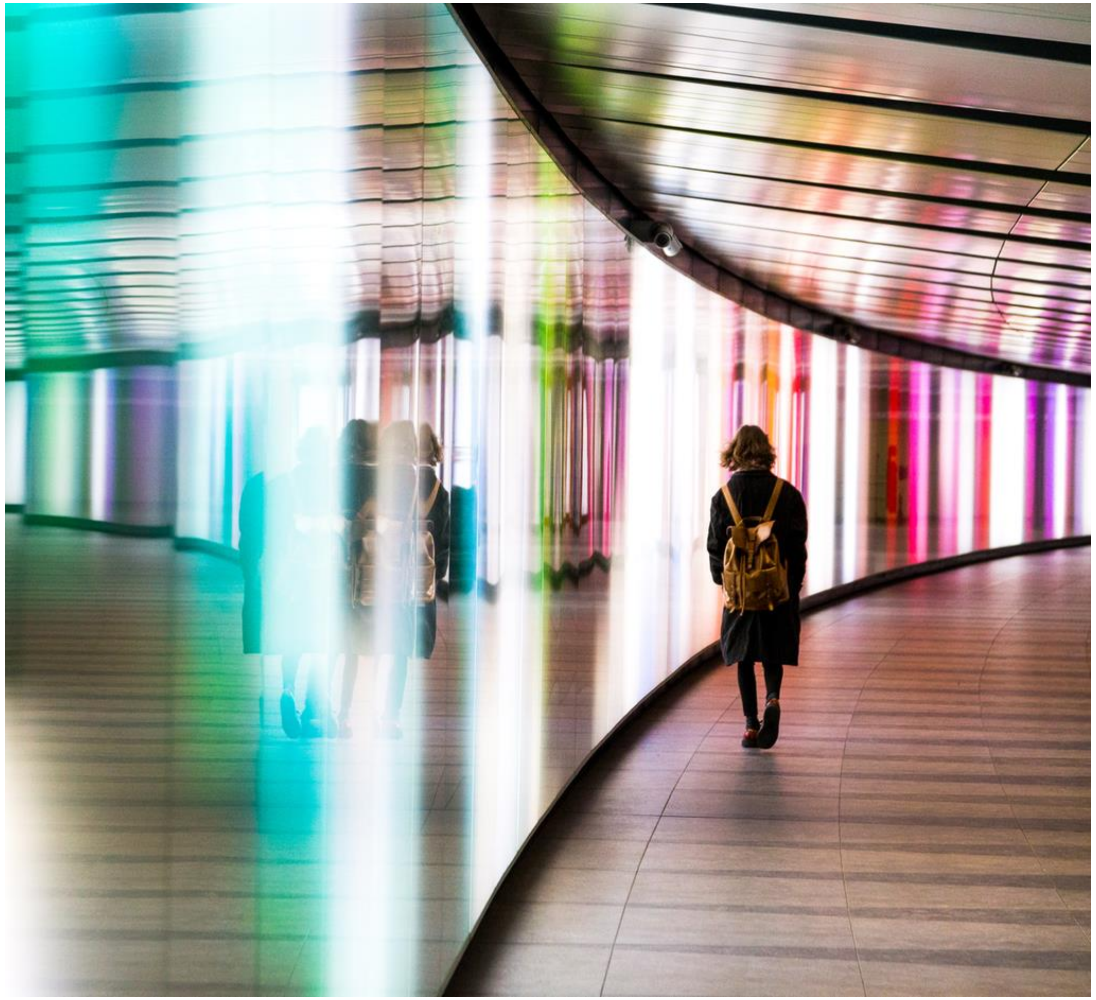
*“My parents have a house in France, I will go there with them. It's completely isolated on the top of a mountain.”*
***Female, 18-24, living at parents***

*“I am going to Croatia with a group of close friends. We rented a big house, where we will enjoy ourselves and nothing to worry about there.”*
***Female, 25-34, Living alone***

*“We’ve rented a house with swimming pool at the coast of Belgium. I am not going too far, I feel that would be too big of a risk.”*
***Female, 35-44, couple with children***

*“Just a relax holiday at a camp site with the family at a safe distance from others.”*
***Male, 25-34, couple***

**For wave 6, Kantar interviewed 500 people aged 18+ in the Netherlands between June 19th and 22nd. They were interviewed online and were nationally representative in terms of age, sex and region.**



# Want to know more? We're here to help

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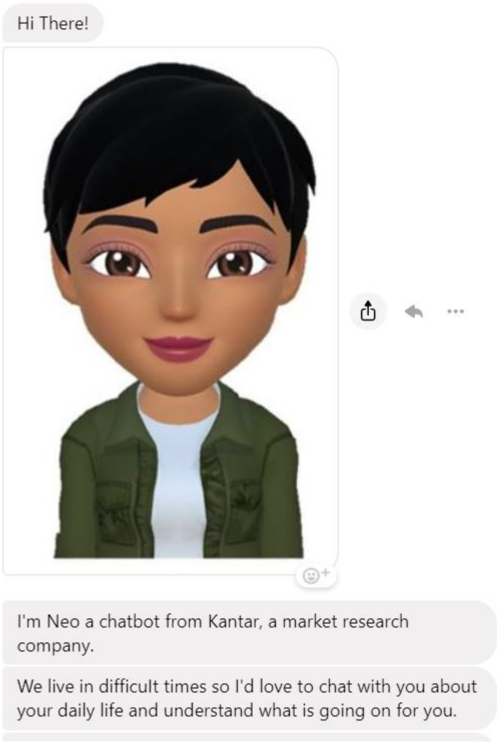
# Appendix

# Chatbot Neo assisted Kantar in understanding behaviour and consumption changes during COVID-19 by engaging in real conversations on Facebook

**STEP 1**
Receive a Facebook ad and talk to Neo for a chance to win a voucher.


**STEP 2**
Individuals engage in real conversations with Neo about the impact of COVID-19.




**STEP 3**
Analyze the conversations and pull out trends and insights.

<u>Conscious, quality-focused purchasing</u>

*"I'll now buy less products and make a more conscious decision, that is sometimes more expensive, but of better quality. It gives me a good feeling" Female, 25-34 (chatbot)*

<u>Implementing a healthy lifestyle</u>

*"I do exercise at home now the gym is closed, preparing and eating more healthy food" Male, 25-34 (chatbot)*

# Fieldwork dates Barometer Netherlands

- **W1 = Wave 1** *Fieldwork 18-19 of March 2020*
- **W2 = Wave 2** *Fieldwork 27-30 of March 2020*
- **W3 = Wave 3** *Fieldwork 9-10 of  April 2020*
- **W4 = Wave 4** *Fieldwork 24-29 April 2020*
- **W5 = Wave 5** *Fieldwork 22-26 May 2020*
- **W6 = Wave 6** *Fieldwork 19-22 June 2020*