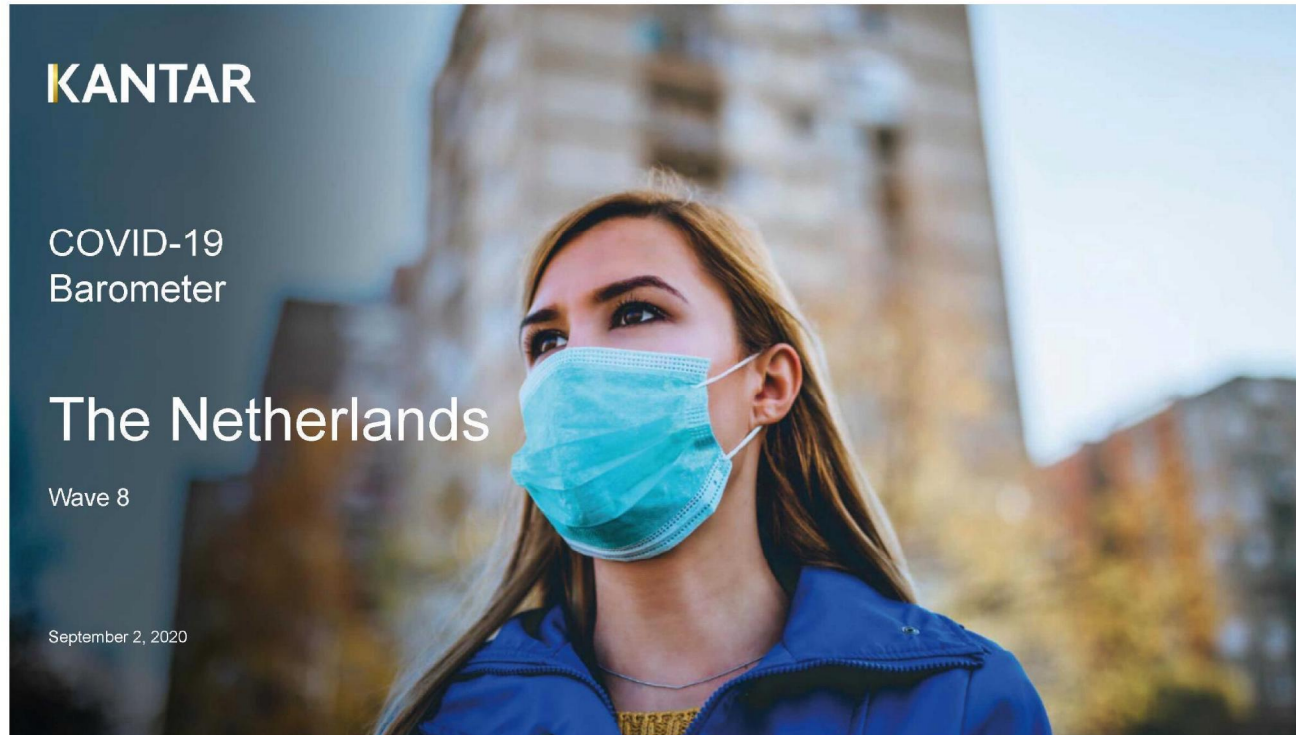
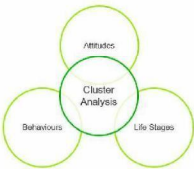




How we have built your story



KANTAR



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

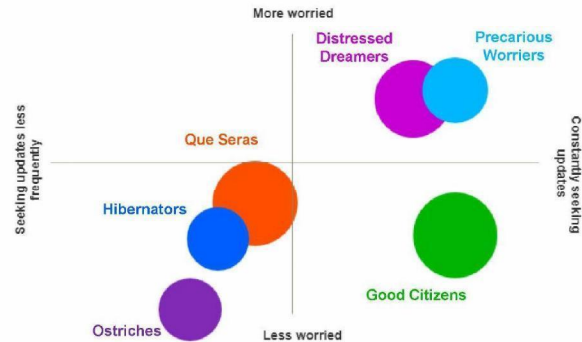
Mapping COVID-19's effects on brands and consumers by combining our own knowledge and expertise

A global segmentation based on 13 golden statements, leading to six segments
See page 3



Kantar created a global segmentation to identify groups of individuals with similar behaviors and attitudes towards COVID-19

- Kantar has created a global population 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 behaviors and attitudes towards COVID-19, resulting in 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 in 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 analyse and explain differences between target groups in the Netherlands



MANAGEMENT SUMMARY

How are we feeling?

With the rise of COVID-19 infections, the levels of worry are increasing again in the Netherlands. Knowing that infections now occur more amongst younger people, **youngsters are increasingly aware of being an at-risk group**. Compared to last month, they are less 'Ostriche' and 'Que Sera', more worried about a possible second wave, and more careful to adhere to health and safety measures.

The new rise of infections has made people realize more acutely that a package of measures is needed before we can return to normal life. Since June, people increasingly think we cannot loosen up on restrictions. Although **trust in governmental decisions and health system capacity is declining**, people still see these institutions as their main help to cope with the coming period.

The expected financial impact of COVID has not changed amongst the Dutch, despite recent publications on negative economic consequences.

Future outlook

In the coming 12 months, people think that the government, healthcare services, their social environment, and employers will play the biggest role in helping to cope with the new normal. For employers, the main focus should be on maintaining **their employees' health** and favoring flexible working.

Brands seem to play a less significant role, and consumers are getting **more divided on what type of action they expect from brands these days**.

4 out of 10 believe that consumer habits and behaviors will not go back to their pre-COVID state. People expect **online and virtual businesses to be on the rise**, while **travelling and restaurant/cafe businesses will get hit most**.

Groups will differ in how they cope with the coming period. Worriers and distressed dreamers will likely anticipate by stocking or buying extra insurances. Ostriches will take more advantage by investing in home projects, sports equipment or cars.

Traveling in the new normal

Railway companies, travel agencies, airlines and hotels did a relatively good job offering help during the COVID-19 travel restrictions. **People are less satisfied with the help from booking providers/ platforms**, because of relatively low customer-centricity and helpfulness of employees.

Holiday behavior will mainly change by more people **prioritizing traveling by car**. Also, people will book smaller, less crowded residences, avoid traveling by plane, or just plan to stay home more.

RECOMMENDATIONS

Trust

People are worried and slowly start to lose their trust in governmental institutions. This can influence consumer trust and thus buying behavior. When people do not trust government, they start to seek other signals for trust and rely more on their own judgement.

Here's the chance for brands and companies to **provide ways for people to get back control. Using the three I's of trust** (Identity, Integrity, Inclusion) can help with this. Facilitate, but not only in the role of supplier. Companies should be particularly aware of **their role as employer** as being a source of reliance, for example by monitoring health safety and favor flexible working.

From a supplier standpoint, **giving value for money, promotions or price reductions** in order to let people experience products will work and give confidence for follow-up buying.

And above all, an important hygienic for getting consumers' trust in these times, is to create a **(COVID) safe shopping environment**.

Brand strategy

1) be authentic

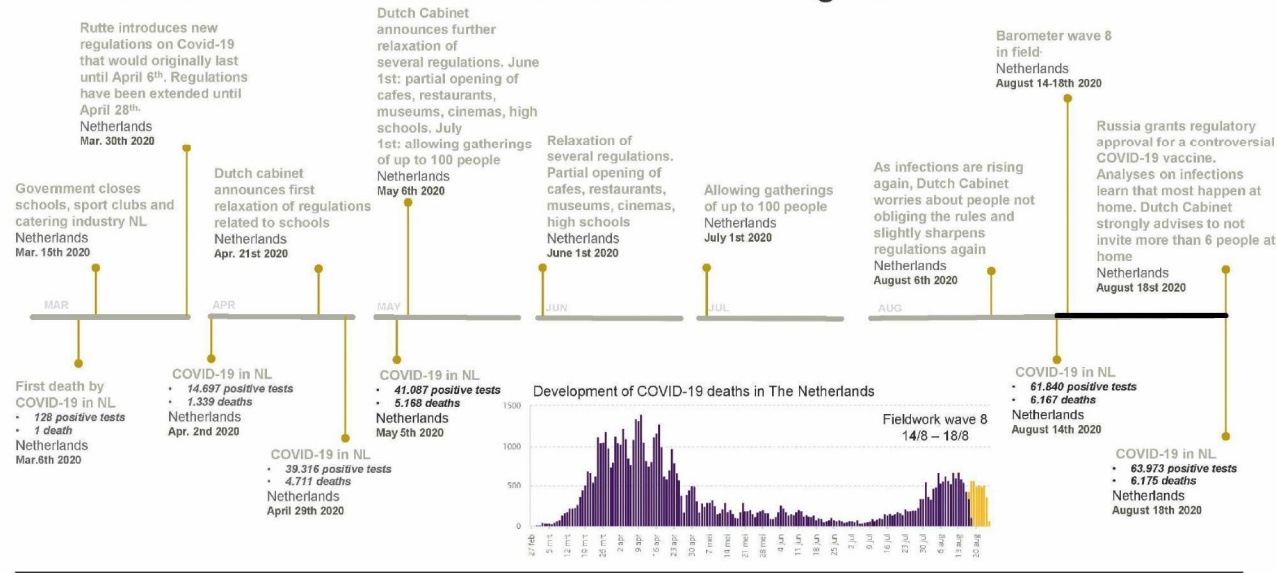
During this phase of COVID, consumers have no clear preferred strategy for brands. This means it is even more important for brands to **keep close to their identity**. 'You be you' is our best advice. So communicate and practice who you are...

2) but be sensitive to the situation

...with one important thing to keep in mind: **guide consumers through practical obstacles caused by COVID**. Brands can't be insensitive to the current situation, especially not when we see peoples' moods are going up and down and different groups feeling and acting differently.

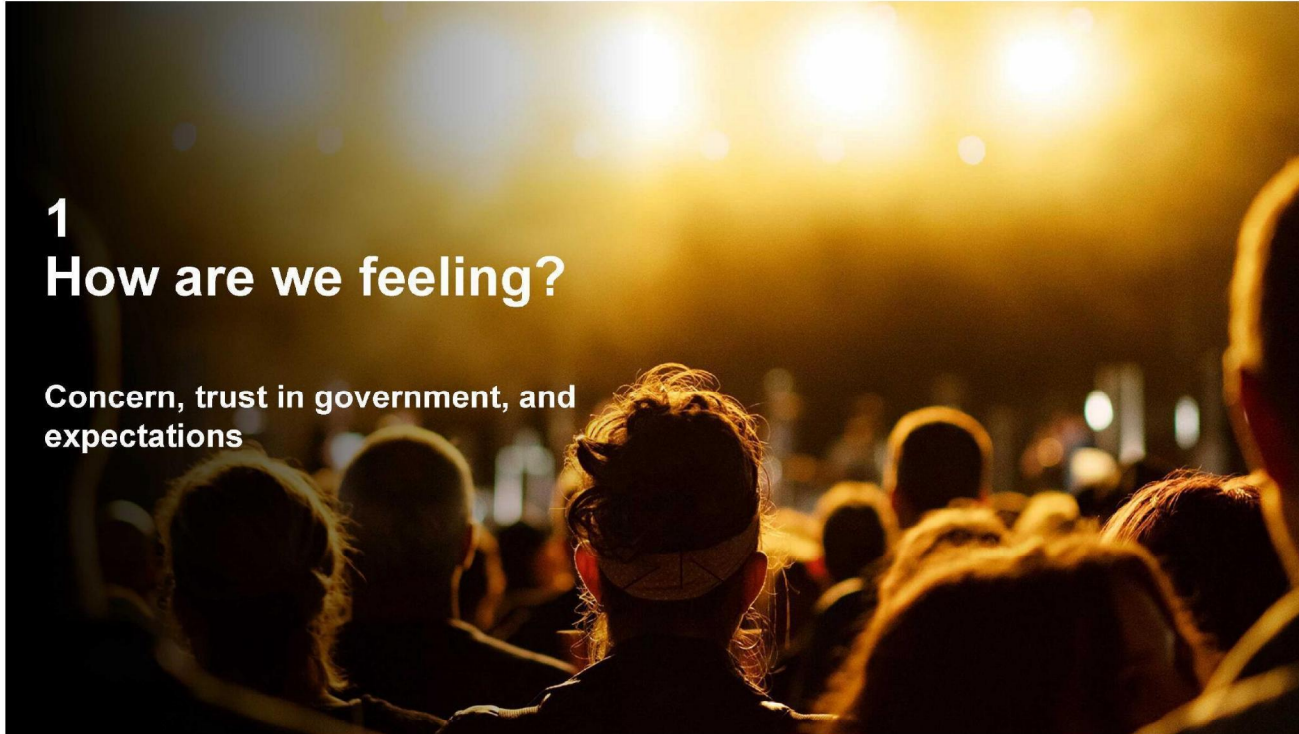
Consumers are not wanting brands to solve the crisis. They do expect them to act normal but in the meantime be sensitive to their needs and the current context. Therefore, brands need to **check in with consumers on a regular basis** to have clear understanding of their current feelings and act accordingly.

Corona timeline in The Netherlands- March 6th to August 18th



1 How are we feeling?

Concern, trust in government, and expectations



1.1 Tribes segmentation

Kantar created a segmentation to identify groups of consumers with similar behaviors and attitudes towards COVID-19. These behaviors and attitudes influence what consumers do and feel, as well as the things they require from brands and advertising.

We monitor how the sizes of the segments develop over time.

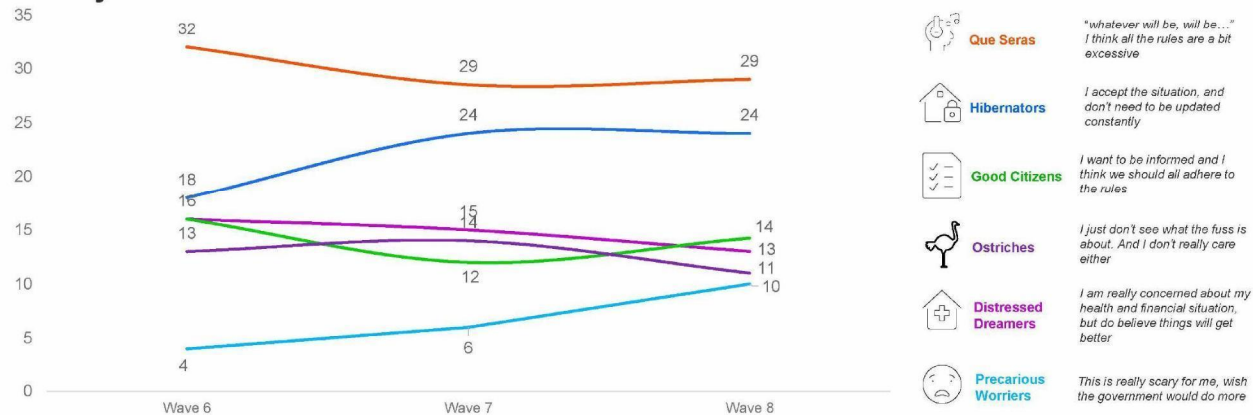


First, meet our six global TRIBES

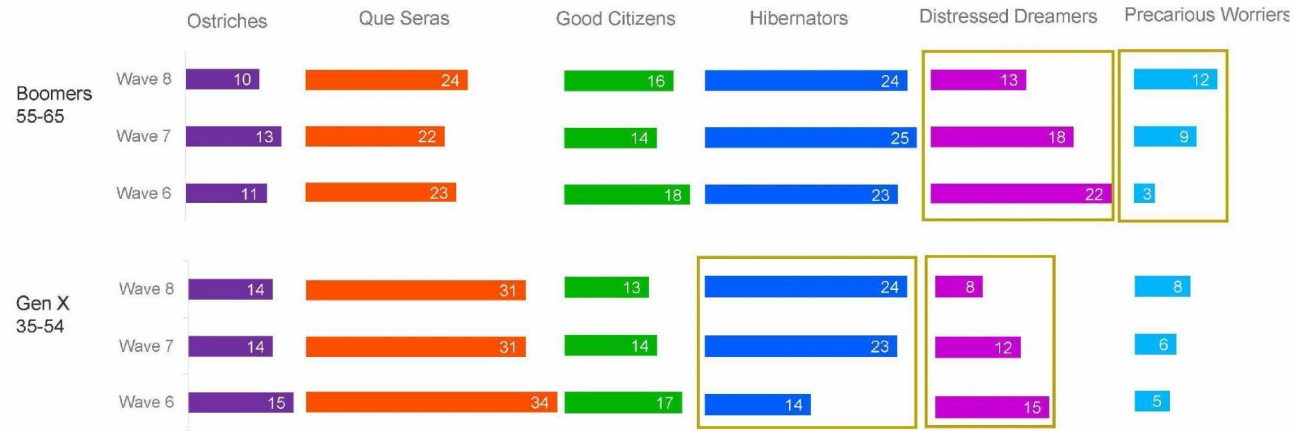
Compared to other countries, the Netherlands has a high share of Que Seras and Hibernators; relatively many people deal with COVID in a quite down-to-earth way, although the situation is also less worrying than in many other countries



Since June (W6), the numbers of COVID infections started to increase in the Netherlands. This led to an increase in the number of Hibernators (people who accept and wait out the crisis), but also in the number of people who truly worry about the situation



As numbers rise, boomers dream less about a (positive) future but worry more. Gen X became also less optimistic, but move more towards Hibernators that wait out the crisis



During the last few weeks, infections have particularly risen amongst younger age groups in the Netherlands

Aandeel jongeren met coronavirus groeit

Jonge mensen die nachtclubs en stranden bezoeken, zorgen wereldwijd voor een stijging van het aantal besmettingen met het coronavirus. Zo meldt de WHO.

ANP/Het Parool 4 augustus 2020, 21:15

 Dagblad van het Noorden

Jongeren met milde klachten van corona blijken heel besmettelijk: viroloog Friedrich van het UMCG maakt zic...

Uit Amerikaans onderzoek blijkt dat kinderen en jongeren met milde symptomen van Covid-19 toch veel virusdeeltjes met zich meedragen.

1 dag geleden



 De Gelderlander

Jongeren laten zich opvallend vaak testen op corona

NIJMEGEN - Jongeren krijgen vaak het verwijt dat ze corona niet serieus nemen, maar testen op het virus laten ze zich wel. Ze gaan juist ...

2 dagen geleden



 AD.nl

Steeds meer jonge mensen met coronavirus: 'Jongeren zijn ...

Steeds meer jonge mensen met coronavirus: 'Jongeren zijn niet onoverwinnelijk'. Jonge mensen die nachtclubs en stranden bezoeken, zorgen ...

3 weken geleden



 AD.nl

Jongeren met milde klachten blijken heel besmettelijk ...

Zonder deze maatregelen is er een aanzienlijk risico dat het coronavirus zich via kinderen verder verspreidt, wat grote gevolgen kan hebben voor ...

4 dagen geleden

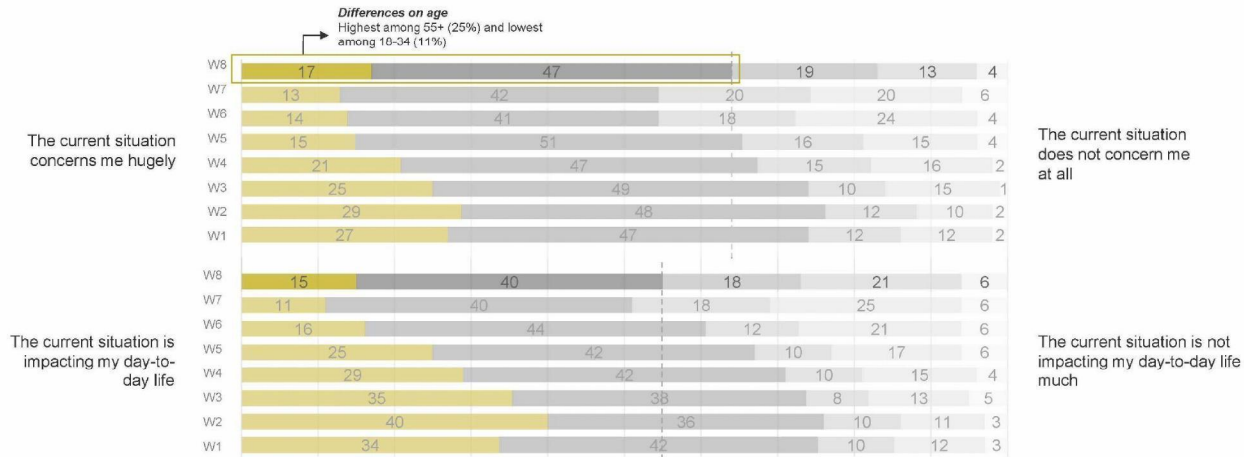


These younger age groups seem to be increasingly aware of the consequences of this: Millennials move from Ostriches to Good Citizens and Hibernators. Within Gen Z, we see less Que Seras but more worriers

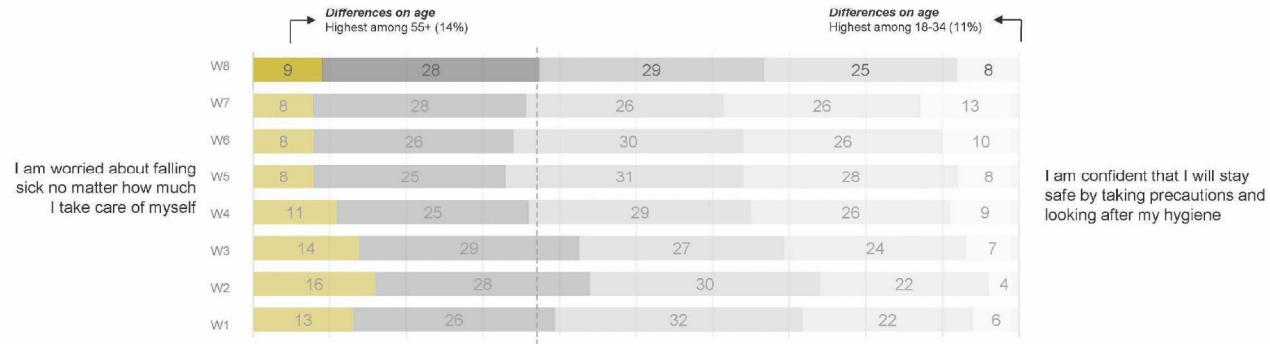


1.2 Overall concern & impact on day-to-day lives

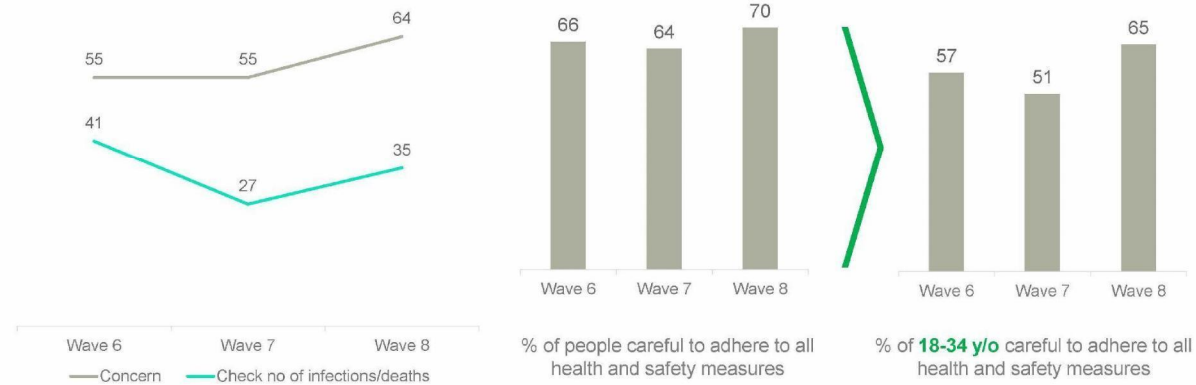
Following an increase of COVID cases in the Netherlands, general concern about the current situation increases, as does the experience of COVID impact on day-to-day life



Worry about becoming infected no matter how much people take care of themselves continues to increase and is highest amongst the oldest age group (55+)

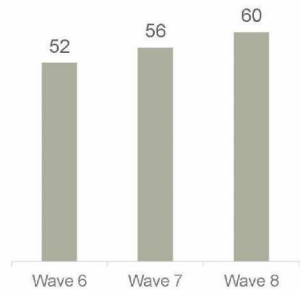


With general concern increasing, the need to stay up to date about the latest numbers increases as well. Increased concern and a greater impact on day-to-day life seems to drive people to follow the rules, especially the youngsters

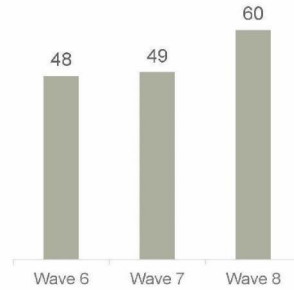


Concern and fear make us increasingly intolerant of people who seem to disregard our safety, and we think people who break the rules should get fines

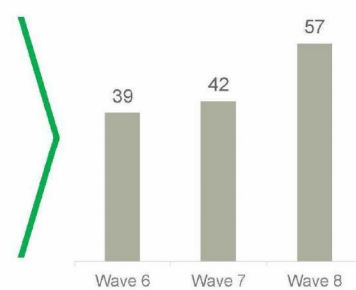
Youngsters (18-34 y/o) show a remarkable increase in share that think that fines should be imposed if people don't follow the rules



% of people that get very angry when someone else doesn't adhere to the latest government guidelines



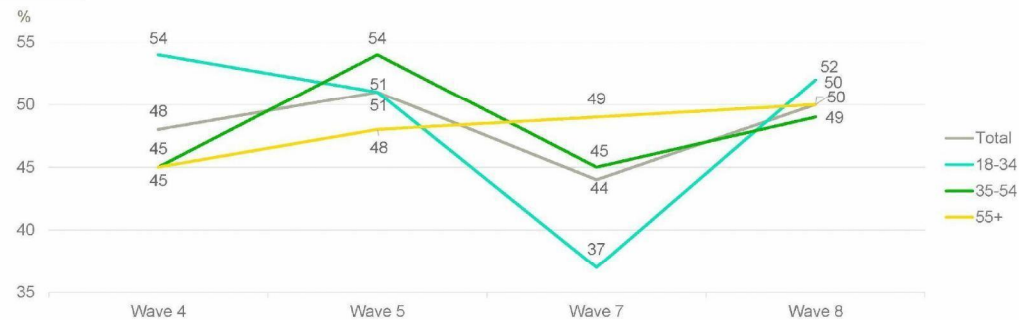
% of people that agree that fines should be imposed if people don't adhere to the latest government guidelines



% of **18-34 y/o** that agree that fines should be imposed if people don't adhere to the latest government guidelines

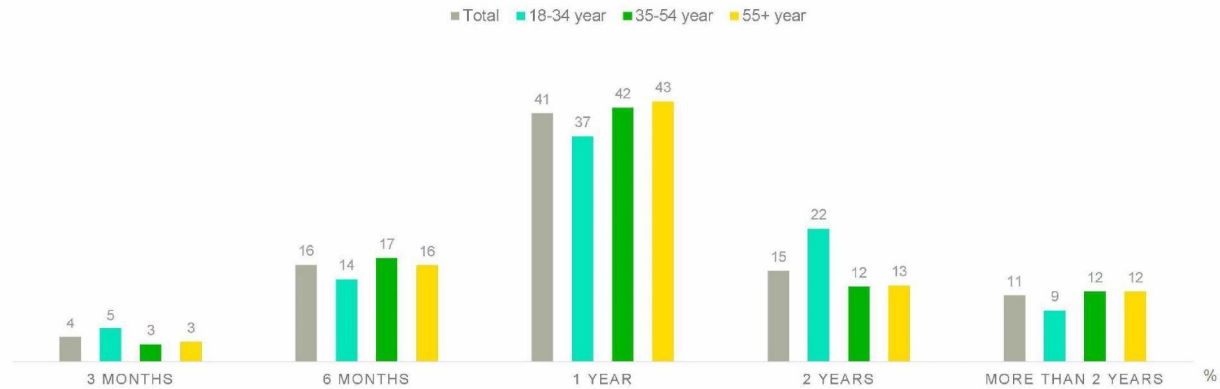
The fear of a new COVID wave is increasing with the increasing actual number of infections between W7 and W8. This is even stronger the case for youngsters, as we also saw them becoming more careful and conscious of rules

"How worried are you that a new, similar critical period will come back in a few months?"



A majority thinks that everything will be normal in one year or longer, a quarter in two years or younger. This is even higher amongst youngsters (31%)

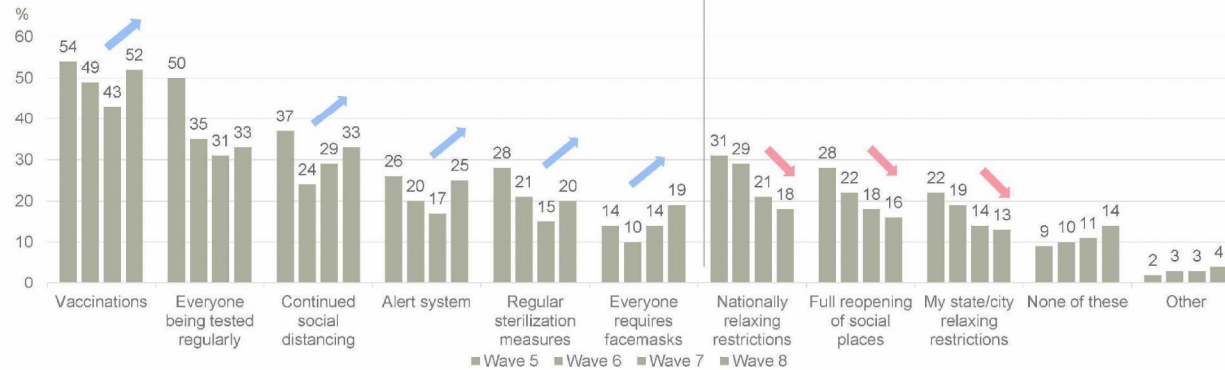
"When do you think things will be back to normal?"





Now that it's clear that the virus is persistent, the Dutch increasingly realize that a package of measures is needed for people to feel safe to return to normal daily life. The trust in relaxing of restrictions is strongly declining since the end of May

The need for a vaccine, testing, and social distancing are most (and increasingly) important, although the support for an alert system is also growing



Rising optimism about the effectiveness of an alert system might have been caused by the Dutch government piloting a new app-based Alert system. Nevertheless, there still is some criticism around the privacy safety of the app

How does the CoronaMelder work?

- The CoronaMelder will send out a notification to all app users who have been nearby for more than 15 minutes.
- The CoronaMelder does not need to use personal information or location; it works via encrypted Bluetooth signals.



Working towards privacy safety

According to the Authority of Personal Information (AP), the following three steps need to be taken before the CoronaMelder can guarantee privacy safety:

- 1) A law needs to be enforced mandating that the use of this app can never be obliged to anyone.
- 2) Data should not become available for Google and Apple.
- 3) The App should adhere to all privacy standards.

AD.nl

Corona-app is nu te downloaden: 'Elke besmetting die je ermee voorkomt, spaart mogelijk een leven'

interviewVanaf vanavond 23.30 uur is de corona-app te downloaden, die op 1 september wordt gelanceerd. Gaat CoronaMelder, zoals de app ...

Volkskrant

De corona-app is nu voor iedereen te downloaden, maar ontmoet nog altijd privacy-kritiek

Stapje voor stapje komt CoronaMelder dichterbij. De app, die moet helpen bij het bron- en contactonderzoek, is beschikbaar in de app-winkels ...

NU.nl

Iedereen die waarschuwing krijgt van corona-app kan zich bij GGD laten testen

Iedereen die op dit moment van de CoronaMelder-app een waarschuwing krijgt dat hij of zij mogelijk besmet is met het coronavirus, kan zich ...

NRC

Privacy van corona-app is nog onvoldoende, zegt AP

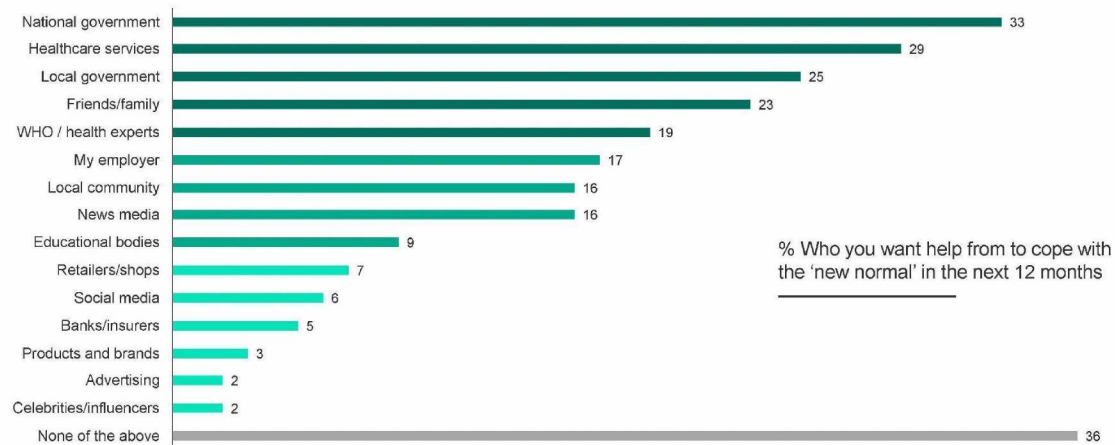
CoronaMelder Volgens de Autoriteit Persoonsgegevens voldoet de corona-app niet aan Europese regels. Het kabinet bereidt een spoedwet voor ...



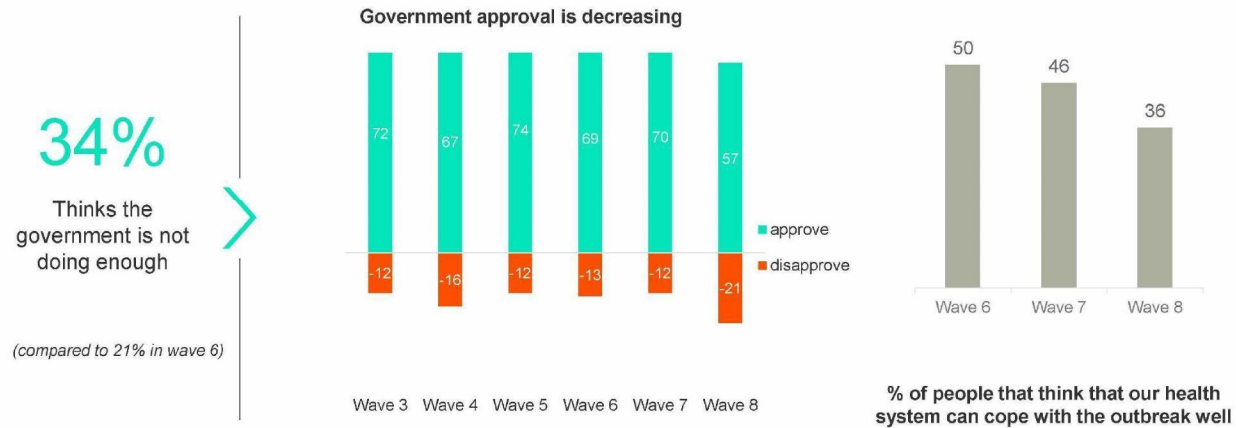


In the next 12 months, we want help from healthcare providers and the government to cope with the new normal

Along with friends and family, and the communities to which people belong



This is in spite of genuine concerns about the leadership and capability of governments and healthcare systems





If trust in government and health systems is declining, consumers will search for other entities to trust. Brands and companies can certainly play a role here
 Not only from a communication or commercial perspective, but also as employers

'Trust requires evoking the same emotions as in human relations'

THE 3 I'S OF BUILDING TRUST

Identification

- Be real (let me see you)
- Make yourself vulnerable
- Make it personal (show some flex)
- Share your secrets (be transparent)
- Signal your values (in a relevant way)

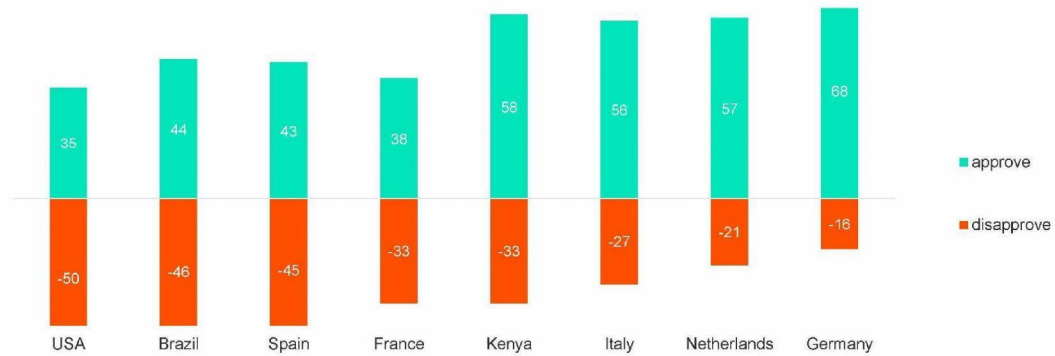
Integrity

- Create consistent experiences
- Own your mistakes
- Provide social proof
- Respect my space
- Keep my secrets

Inclusion

- Treat me as an equal
- Celebrate our longevity
- Equip me to trust myself
- Be accessible

But compared to other countries, Dutch citizens are still quite confident about the way its government acts. In general, the harder countries are hit, the bigger the lack of governmental trust.



1.3 Impact on income & employment

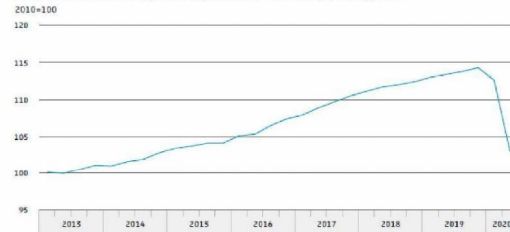
CBS announced that the Netherlands experiences the largest economic decline on record, and CPB predicts negative long-term consequences. While at first, mainly small companies were hit, now also big companies (in specific sectors) are losing their reserves.

Economie krimpt met 8,5 procent in tweede kwartaal 2020

14-6-2020 09:30

Volgens de eerste berekening van het CBS, op basis van nu beschikbare gegevens, is het bruto binnenlands product (bbp) in het tweede kwartaal van 2020 met 8,5 procent gedaald ten opzichte van een kwartaal eerder. Een dergelijke krimp is niet eerder door het CBS gemeten. De daling van het bbp in het tweede kwartaal is voor meer dan de helft toe te schrijven aan de sterk gedaalde consumptie door huishoudens. Verder namen ook de investeringen en het handelssaldo sterk af. De krimp in Nederland was wel kleiner dan gemiddeld in de eurozone en in de ons omringende landen zoals Duitsland, het Verenigd Koninkrijk en België.

Bruto binnenlands product (volume), seizoengecorrigeerd



Source: CBS

Blijvende economische schade van de coronacrisis

De kans is groot dat als gevolg van de coronacrisis het bbp langdurig of zelfs permanent lager blijft dan verwacht op basis van trends van voor de recessie. Dit komt met name door een vertraging in de productiviteitsgroei.

Coronapublicatie
In deze reeks publicaties belicht het CPB de economische gevolgen van de coronacrisis

Source: CPB, 25-8-2020

Corona vergt bij NS vijf jaar herstel: pas in 2025 weer op het niveau van 2019

De coronacrisis eist een zware tol van de Nederlandse Spoorwegen. Tot 2025 vrees het bedrijf ruim 4,7 miljard aan inkomsten mis te lopen. Er verdwijnen banen en de vernieuwing van het treinpark wordt geschrapt of opgeschort.

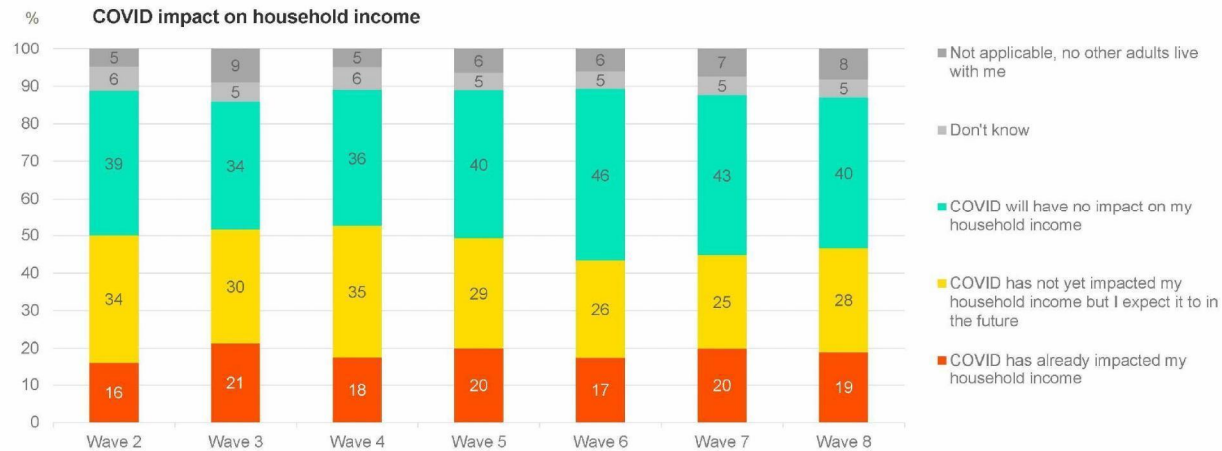
Amstelrooy 20 mei 2020, 17:26 Source: Volkskrant

WOL NIEUWE • ECONOMIE • VR 21 JULI 2020 • ALANGEFUET 19.21 JULI 10.04

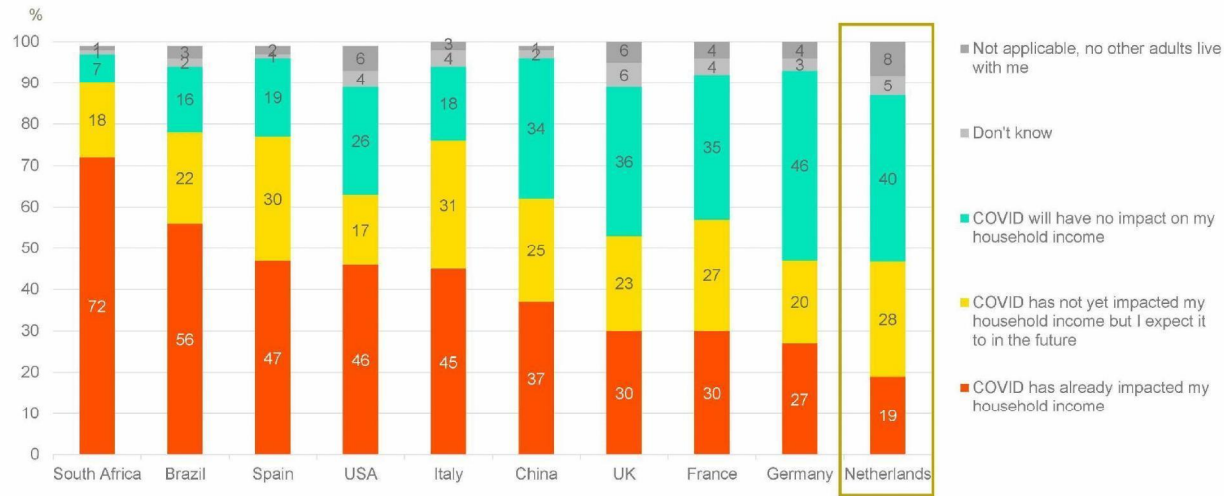
KLM: tot 5000 banen verloren in komende jaren door coronacrisis

KLM schrapt vanwege de coronacrisis de komende jaren in totaal tussen de 4500 en 5000 voltijdbanen. Dat maakte het bedrijf vanochtend bekend.

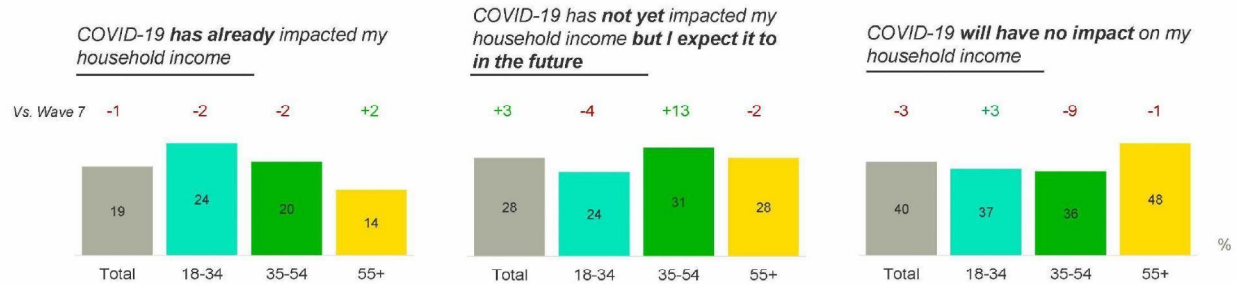
Despite this negative recent news, consumer expectations of the financial impact on their own household have hardly changed since the beginning of the pandemic. Still around 4 out of 10 expect not to be impacted



And looking at the broader picture, COVID19 has less impact on household finances in the Netherlands than in other countries (until now)



But differences per group are there. Dutch youngsters seem to have been hit during the early phases of COVID, possibly because they work much in hard hit sectors and on flexible basis. As COVID number rise since wave 7, now 35-54 y/o increasingly worry about future financial impact



A majority is currently working totally as normal or as normal, but from home. This is more than in W7 (46%), mainly caused by an increase of younger people that are now working in their normal way

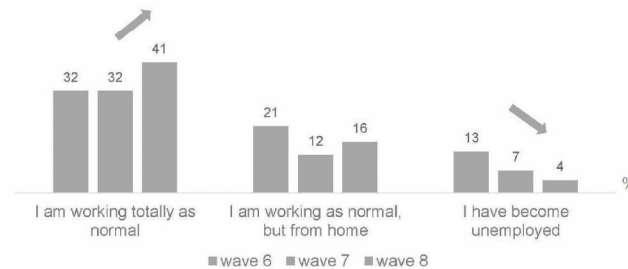
Another sign of youngsters seemingly already took most of the heat, is that they have become less unemployed during the past few weeks

How has the Coronavirus epidemic impacted your employment?

18/34 y/o:

51%

....is currently working as normal
or as normal but from home



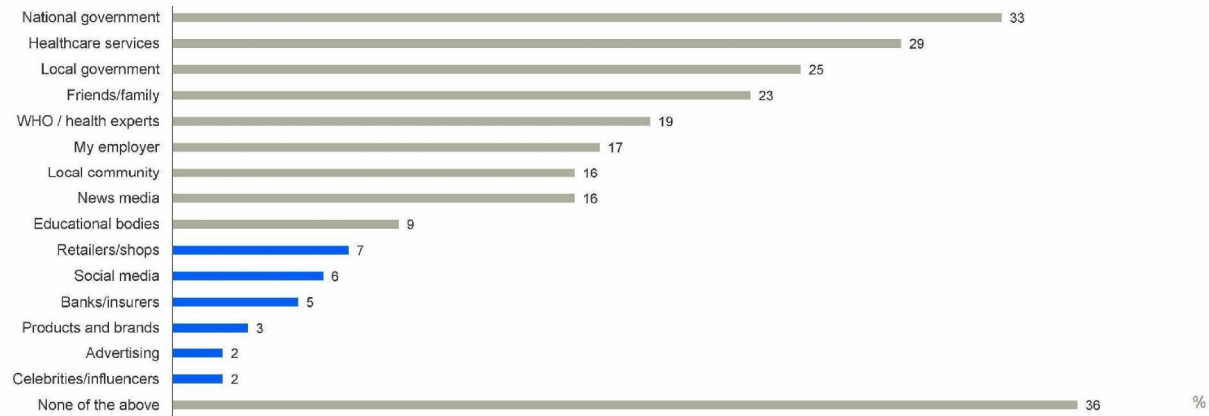
2 What do we expect from brands



People think that brands only have a limited role in giving support to coping with the new normal in the next 12 months



Who would you want help from to cope with the "new normal" in the next 12 months?

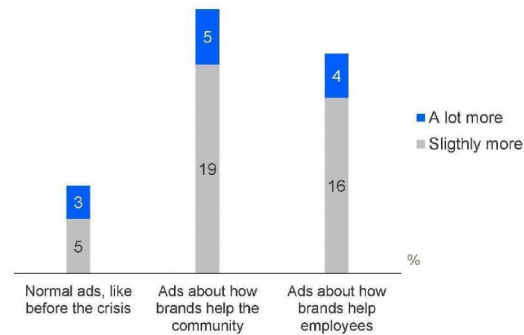


Although some brands chose to, there has been no call for brands to stop advertising in COVID

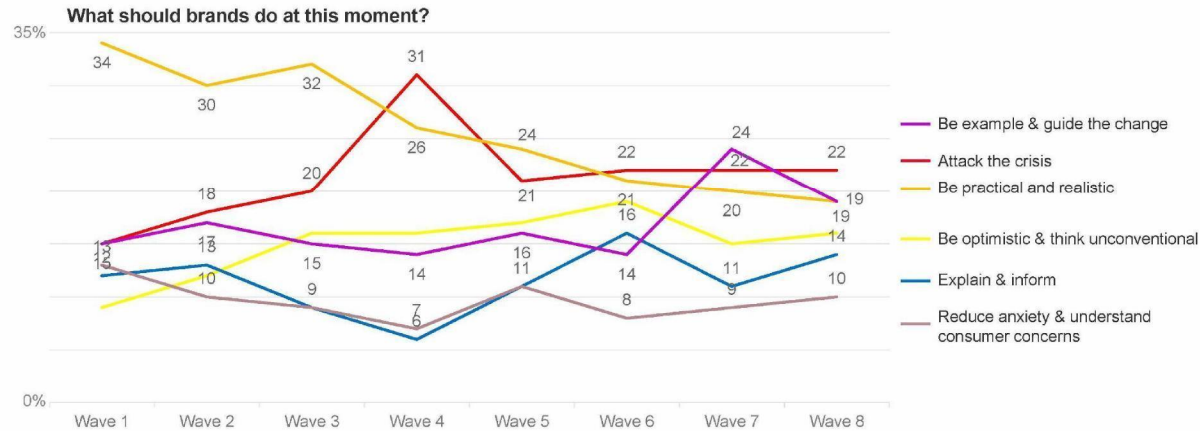
People long for normality, but in the same time they want advertisers to share their priorities and to recognize that things are not normal

68%
... are happy with the
amount of advertising
they see

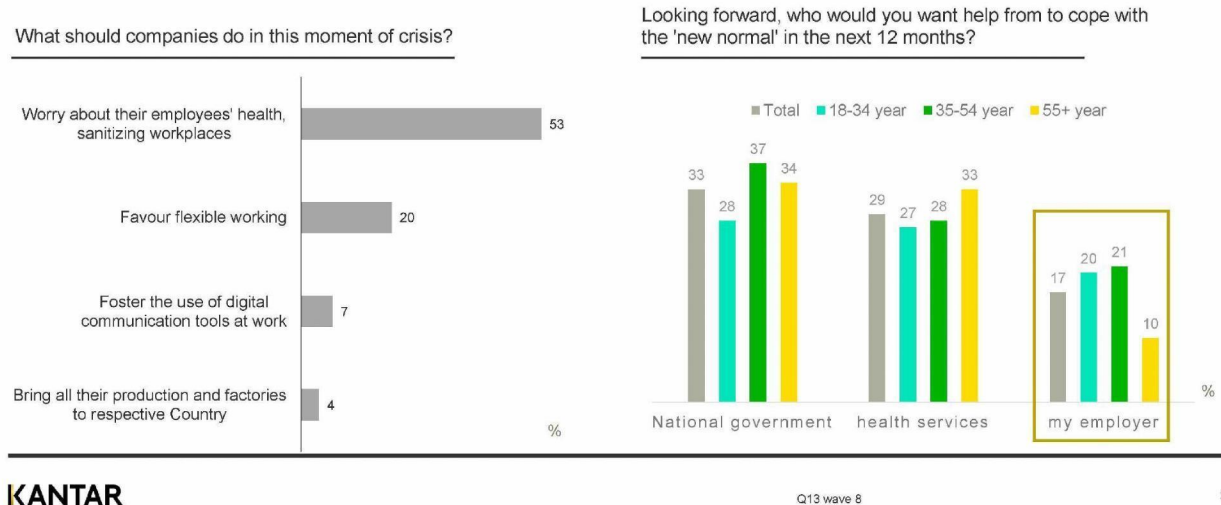
How much of the following would you like to see?



But in the current phase, consumers are divided on what type of action they expect from brands. At least we can say there is more need for attacking the crisis, and guidance through the new normal, than for reducing anxiety



It is important to note that companies are seen first as employers, then as suppliers. So it's crucial to have an *internal* focus on their employees' health. Not only now, but also in the coming period, people will rely on their employer



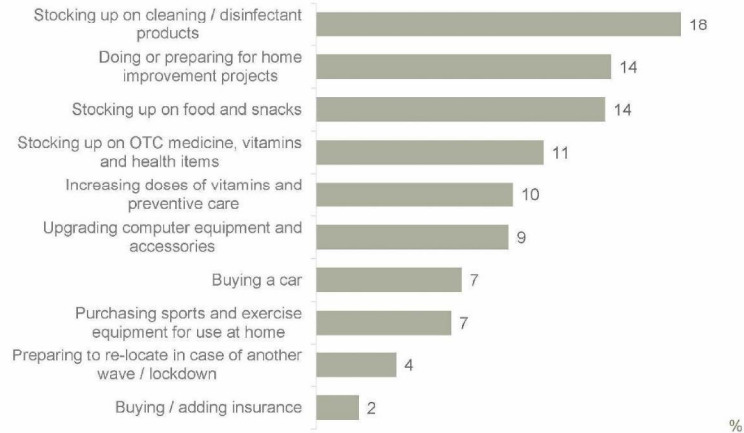
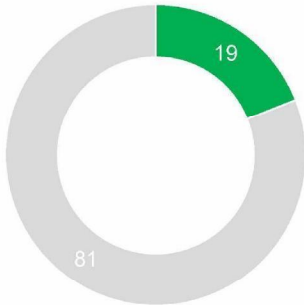


3 Future outlook

Given the ongoing uncertainty around the development of the virus, what are consumers planning to do in the next 12 months?

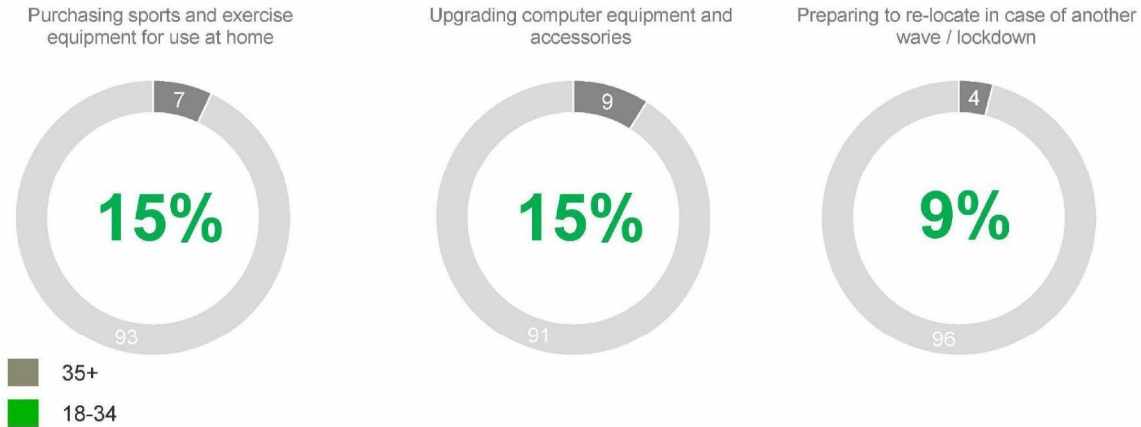
One out of five consumers is willing to travel in the next 12 months. Others will be stocking up on cleaning products, health items, and food/snacks, or they will do home improvement projects

Planning travel in the next 12 months



%

There are significant differences between those aged 18-34 and those age 35+. The youngest group expects to invest more in sport equipment and computer equipment. Also the youngsters are more likely to re-locate in case of another lockdown



Regarding the segments, the Precarious Worriers and the Distressed Dreamers are more likely to anticipate and prepare for a new lockdown

Precarious Worriers are more likely to:



Stocking up on OTC medicine, vitamins and health items

22% vs. 11% (total)



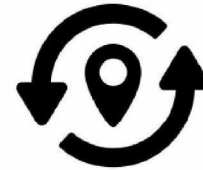
Buying / adding insurance

9% vs. 2%



Stocking up on cleaning / disinfectant products

30% vs. 18%



Preparing to re-locate in case of another wave / lockdown

10% vs. 4%

The Ostriches, on the other hand, are expected to take more advantage of the situation by investing in home projects and sports equipment, or to buy a car

Ostriches are more likely to:



Doing or preparing for home improvement projects

25% vs. 14% (total)



Buying a car

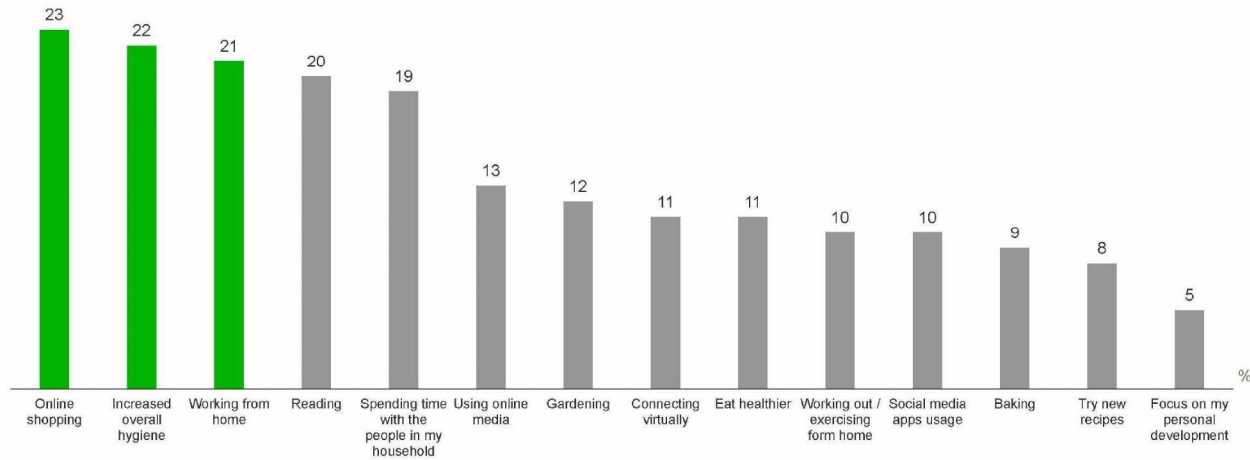
16% vs. 7%



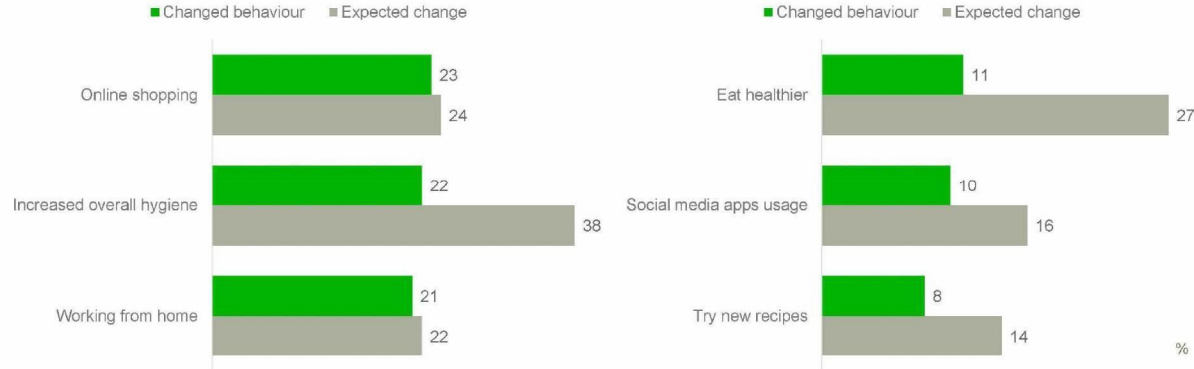
Purchasing sports and exercise equipment for use at home

15% vs. 7%

We have already changed many of our behaviors since the start of the pandemic

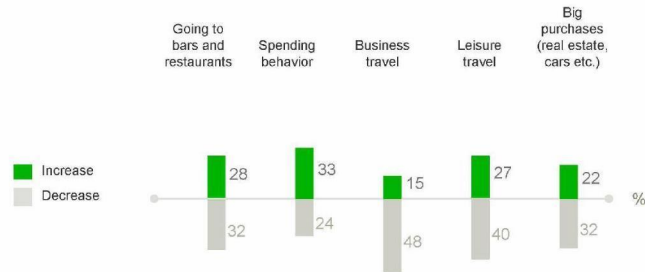


The changed behaviors are somewhat in line with the expected changes in behavior after the lockdown, measured in the end of May (wave 5)



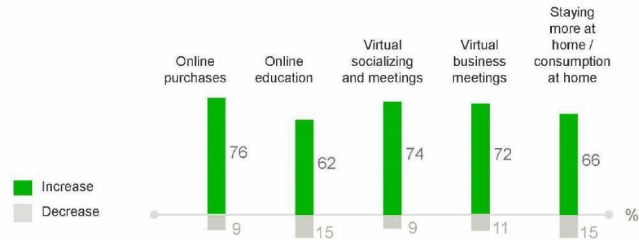
**41% believes that consumer habits and behaviors will change after the crisis.
Mainly business and leisure travel are expected to be impacted negatively**

Will consumer habits and Behaviors change?

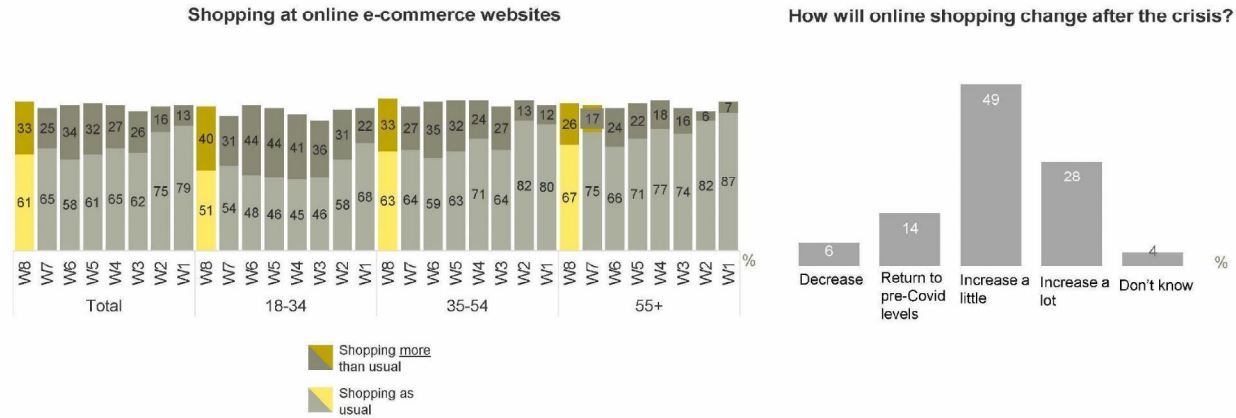


On the other hand, there is an expected increase in usage of online purchases, education, socializing, and business meetings

Will consumer habits and Behaviors change?

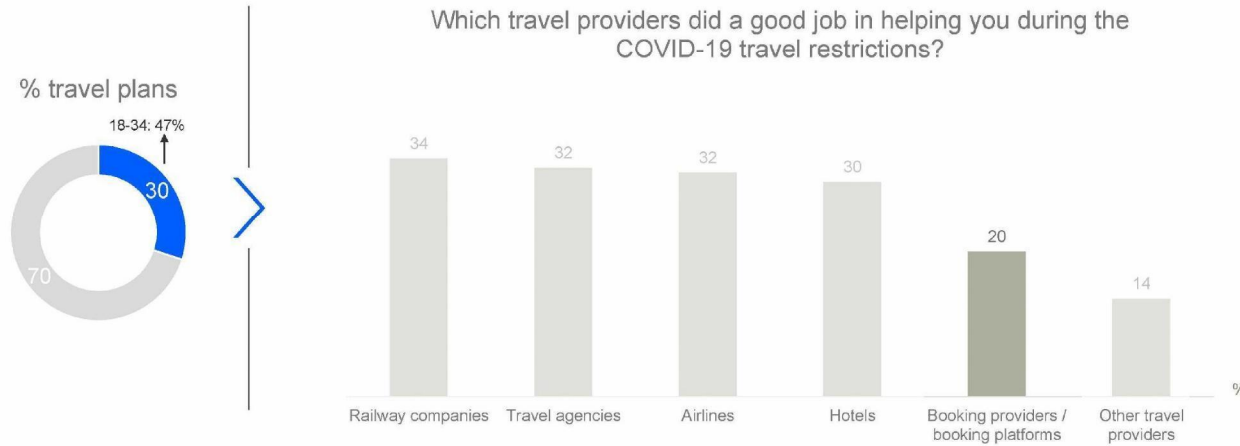


Online purchasing is expected to increase, but it has already been in a firm lift since the start of the pandemic



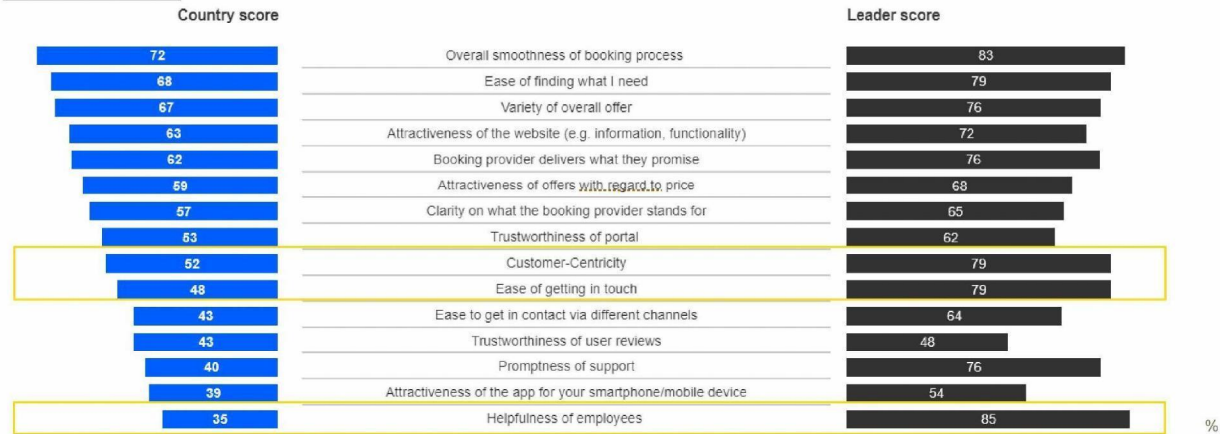


**In general, people are less satisfied with the help from booking providers/
booking platforms than from other travel providers during the restrictions**

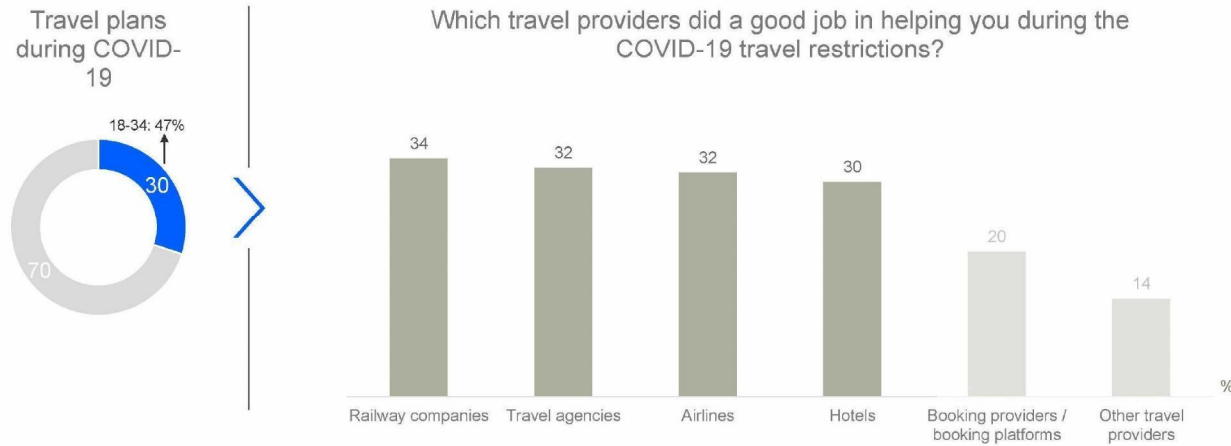


There is a large difference between the market leader of booking providers and its competitors. This is mainly due to a high performance on customer-centricity and helpfulness of employees. Other providers can learn from this

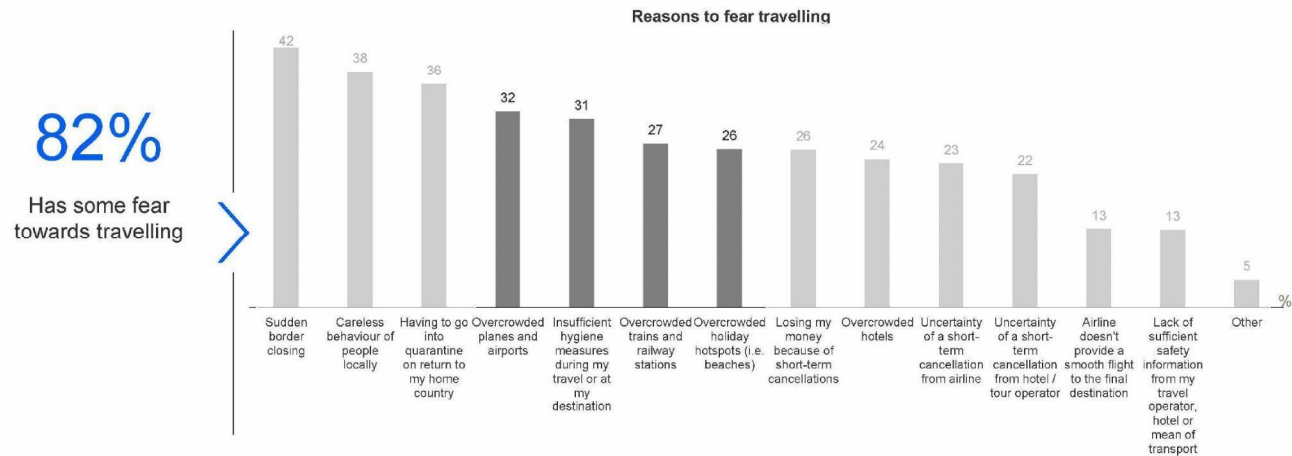
Booking providers



The railway companies, travel agencies, airlines and hotels did a relatively good job in helping their customers during the COVID-19 travel restrictions

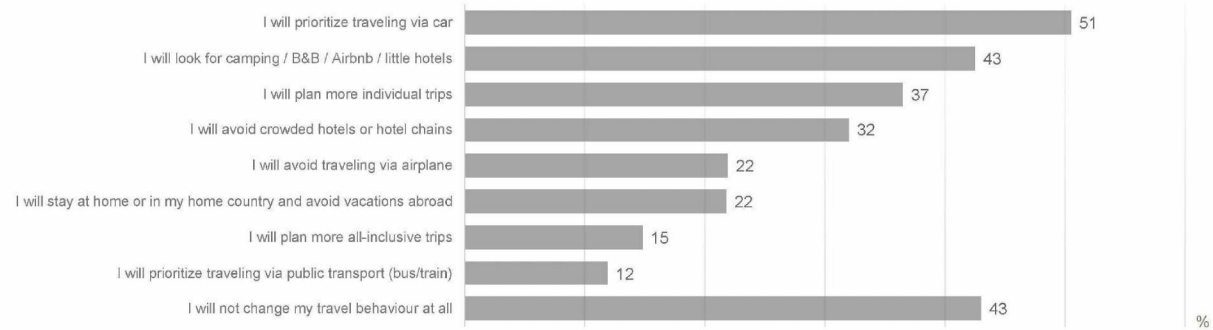


Many people have some fear towards overcrowded spots. So the travel providers can play an assisting role in overcoming those fears

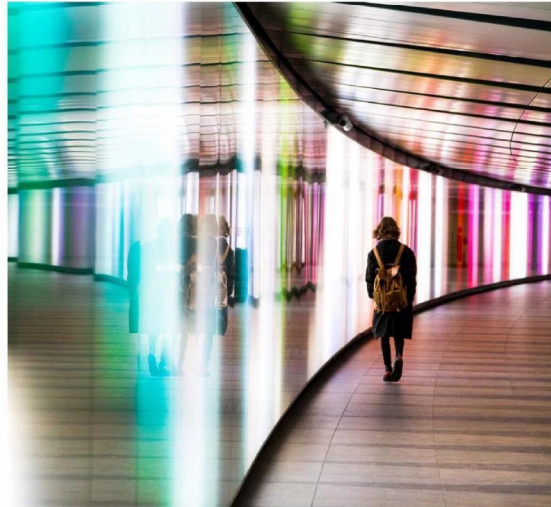


Due to their fear for overcrowded places, a majority will change their holiday travel behavior in the next 12 months. Half will prioritize traveling by car, around 4/10 will look for little hotels or plan more individual trips

Top 2 (strongly agree/agree)



For wave 8, Kantar interviewed 501 people aged 18+ in the Netherlands between August 14th and 18th. 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

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*
- **W7 = Wave 7** *Fieldwork 17-21 July 2020*
- **W8 = Wave 8** *Fieldwork 14-18 August 2020*

