

KANTAR

Covid-19 Barometer

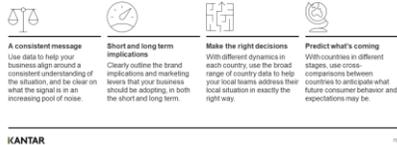
Wave 1 results for The Netherlands

Consumer Evolution
and Brand Implications



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



Our own COVID-19 Barometer looking at consumer's attitudes, behaviours and expectations



This validated framework with its unique tools helps to understand a brand's position and how to drive strategic and competitive advantage

KANTAR

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

BRANDZ

Using the world's largest brand equity database to bring you learnings on the importance of strong brands

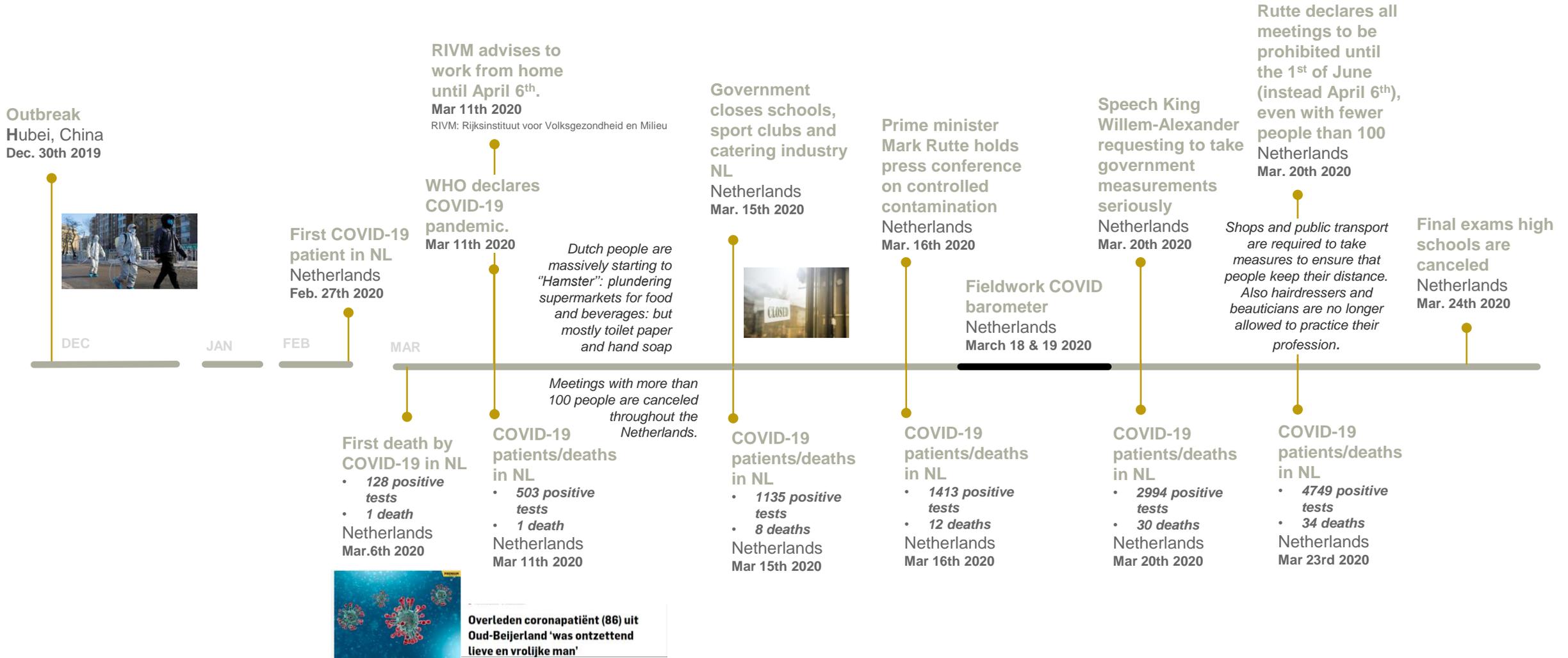


Through social media scraping relevant and accurate data was extracted from social media channels



The Dutch Relocation Panel (NVP) provided a unique, large-scale source of information about displacement behavior, motives and demographics of the Dutch.

Corona timeline in The Netherlands



A summary: the Dutch show a high level of concern about COVID-19 and the associated impact on day-to-day life, though changes in expectations towards brands and consumption behaviour is still limited

The Dutch are concerned and seeing an impact on daily life...

Roughly 1 in 4 Dutch consumers state that the current situation concerns them hugely, a large portion also states that the situation is impacting their day-to-day life

Looking at an international context, the hugely concerned group in the Netherlands is (still) relatively small and the experienced impact is on par with other markets

The Dutch are mostly concerned with, at this point, being prepared and well informed and are searching for information on diagnosis and prevention

...but they do not yet expect major changes in the way brands act

Public opinion is that brands and advertising should not exploit the situation as it is, but instead brands should help and comfort Dutch consumers and lead by example

Brands should put themselves in the consumer's position, be sincere and be themselves, in line with existing brand values

Nevertheless, public opinion is that companies should first and foremost be mindful of their role as an employer, rather than their role in the wider community and towards consumers

...and they mostly continue consuming and shopping as usual across channels

Compared to last month, shopping across offline and online channels has not changed much: the majority of consumers claim to continue shopping, through e-commerce websites as well as at physical outlets, as usual

At this point, Dutch consumers expect only a slight increase in terms of their online shopping behavior in the near future

Media consumption and social media consumption in general are increasing due to limitation on out of home activities – with big wins for TV and online

In this report we will dive into three topics:

1. How are we feeling?

- Level of concern and impact on day-to-day lives
- Level of impact on financial planning and stocking up on items
- What information about coronavirus are Dutch searching for
- What feeling is dominant at the moment
- What's happening on Twitter

2. What are the implications for brand management?

- Brands should not lose sight of the long term
- Challenging times require a disciplined approach
- Brands must develop a strategy that is in line with the emotive positioning
- Be practical and realistic and help consumers in their everyday life
- Good Customer Experience starts with good Employee Experience

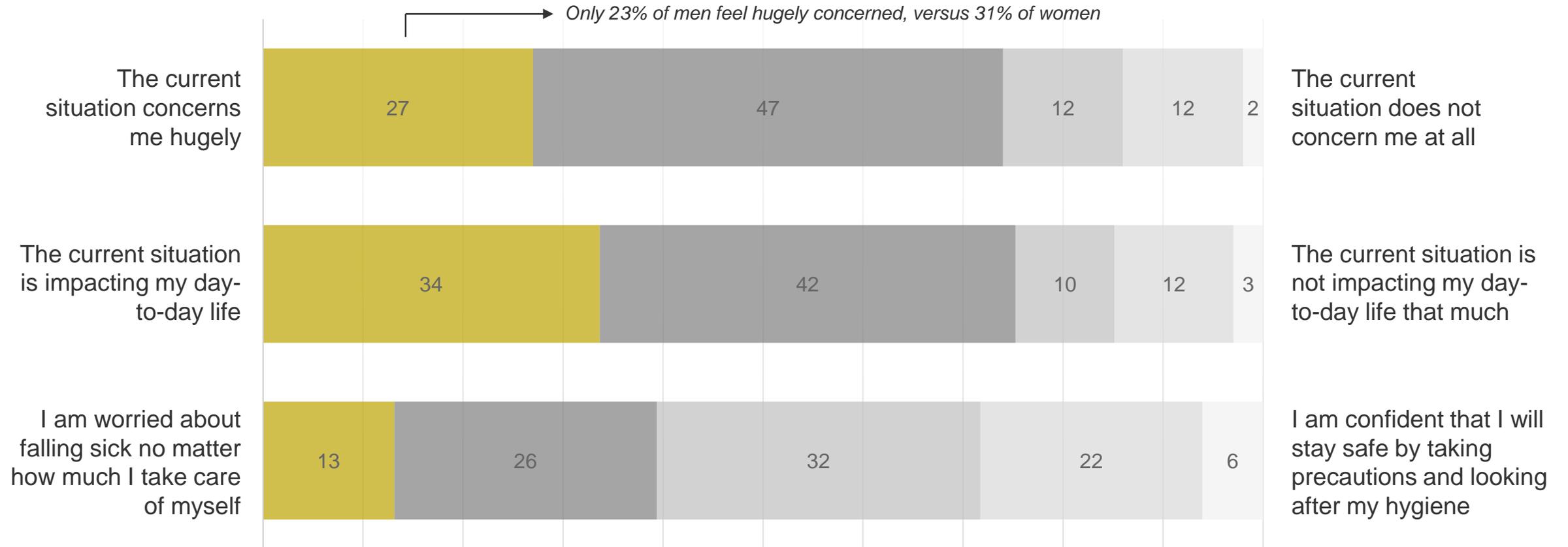
3. How are we consuming?

- Two in three consumers are still shopping as usual across channels
- In terms of media consumption, consumption in general is increasing, with TV and internet being the biggest winners
- National media channels are by far the most important source for trustful COVID-19 information

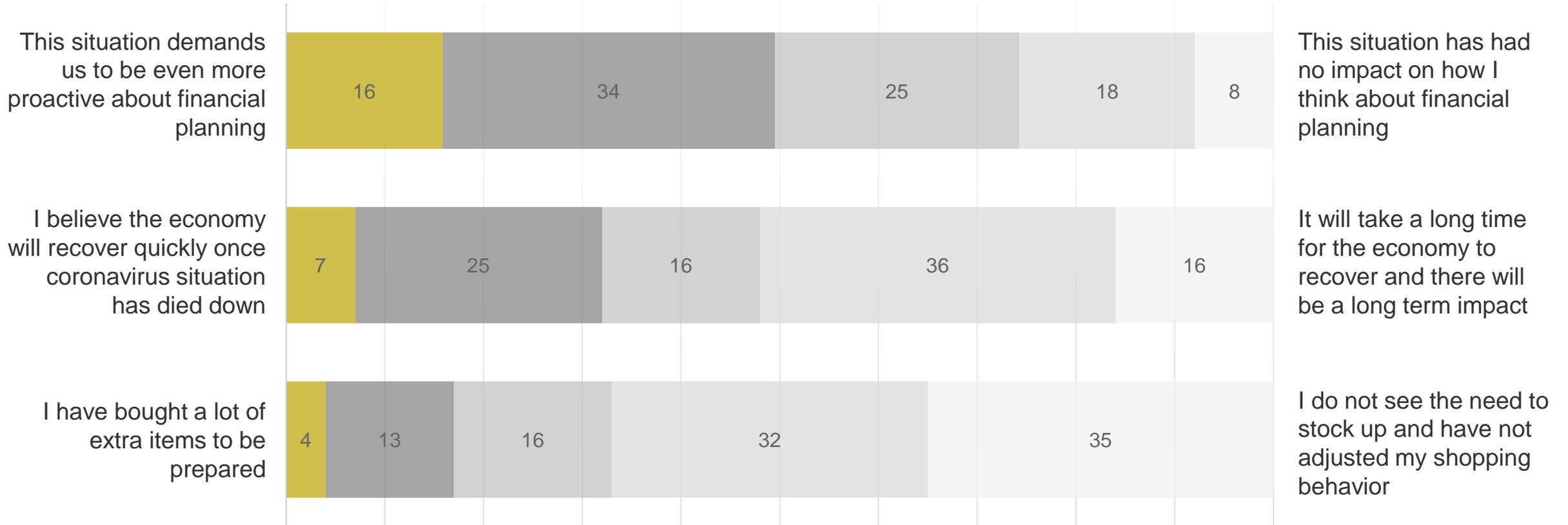
1 How are we feeling?



Roughly one in four Dutch are hugely concerned about the coronavirus situation. A larger proportion feels that their day-to-day lives are very much impacted



Despite the concern, the Dutch are not yet adjusting financial planning, and claim that they have not bought extra items to stock up



Although only a small proportion of the Dutch says they have stocked up, images in the media seem to show a different picture. Especially toilet paper is popular

GEZONDHEID

Vechtpartij in supermarkt Amstelveen vanwege hamsteren wc-papier

15 MRT 2020, 12:38 / UPDATE: 15 MRT 2020, 12:48

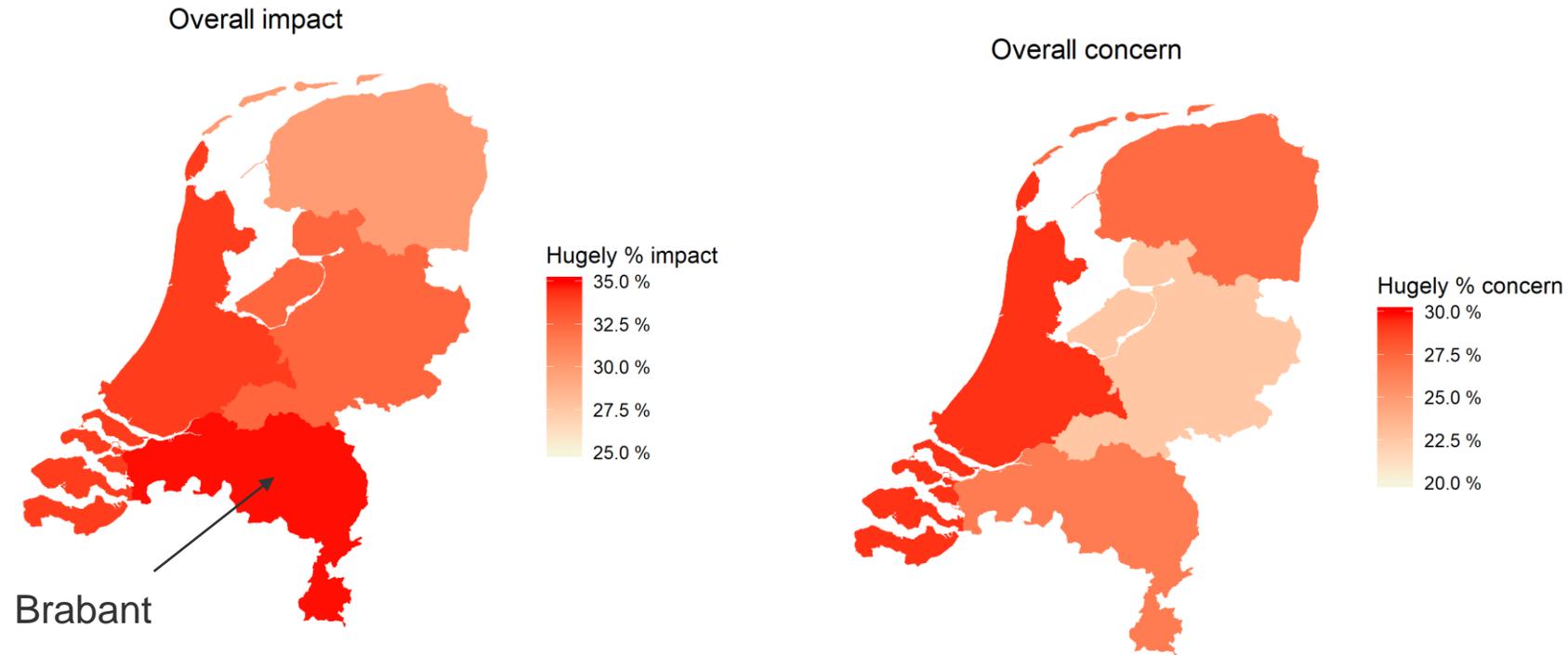


Nederland blijft wc-papier, blikgroente en zeep hamsteren



Lege schappen in de Jumbo in Oud-Beijerland doordat mensen massaal boodschappen inslaan uit angst voor het coronavirus. Beeld Arie Kievit

The first outbreak of coronavirus was concentrated in the province of Brabant, and that seems to have led to a higher proportion of people that indicate experiencing high levels of impact on their day-to-day lives

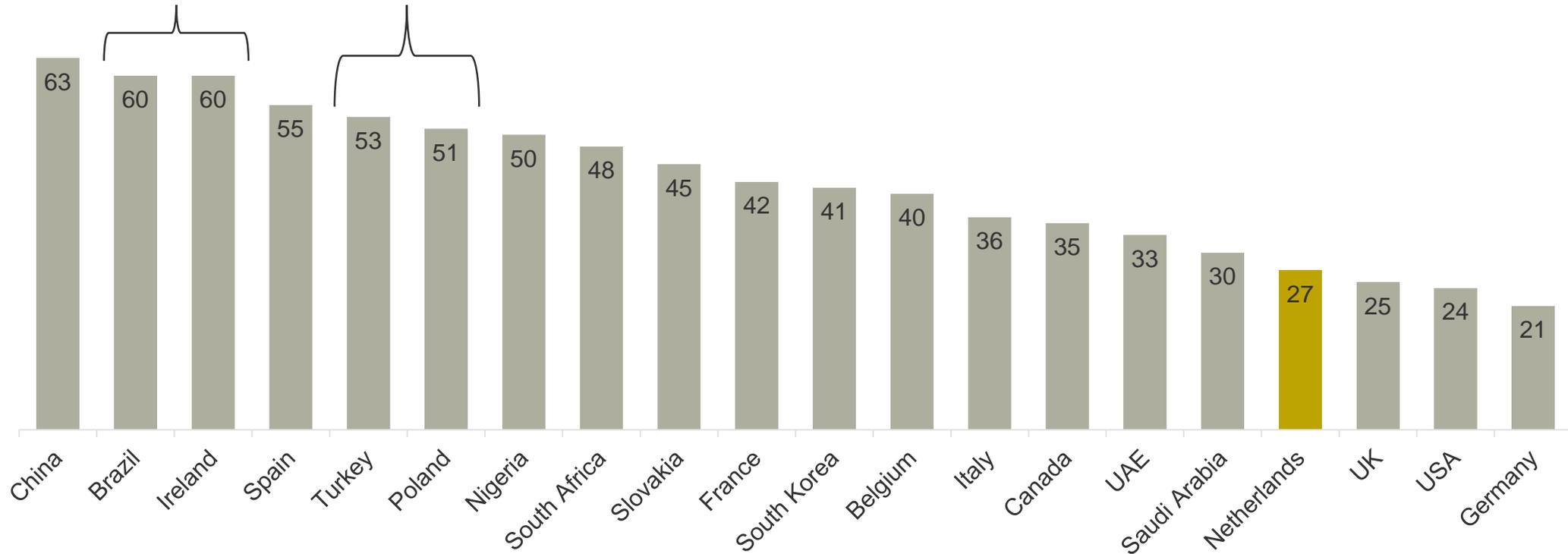


Our hypothesis is that the higher proportion of concerned people in the West of the Netherlands – where the Randstad is located- can be due to people living closer together there.

Concern is naturally heightened in many markets around the world. Some cases of high concern can be caused by cultural and/or country specific infrastructure

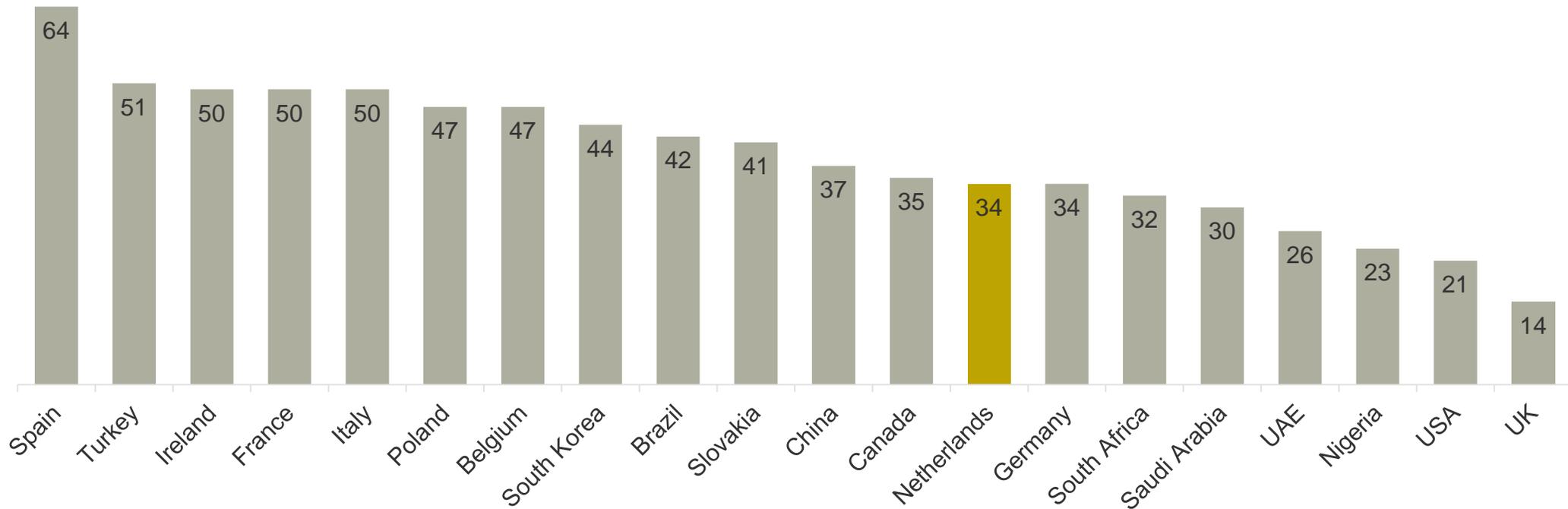
“The situation concerns me hugely”

Brazil, Ireland, Turkey & Poland seem to have particularly elevated levels of concern – not far behind China and beyond the levels you might expect given the number of cases.



Compared to other markets, the experienced impact on day-to-day lives in the Netherlands is average

“The situation is impacting my day-to-day life”



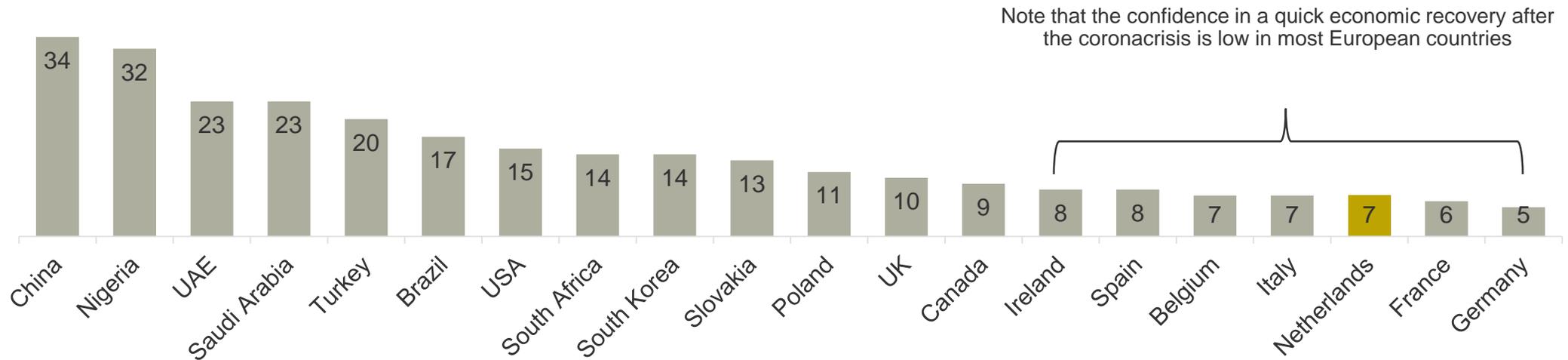
The Dutch are relatively confident that they will stay safe by taking precautions and looking after their hygiene

"I am worried about falling sick no matter how much I take care of myself"



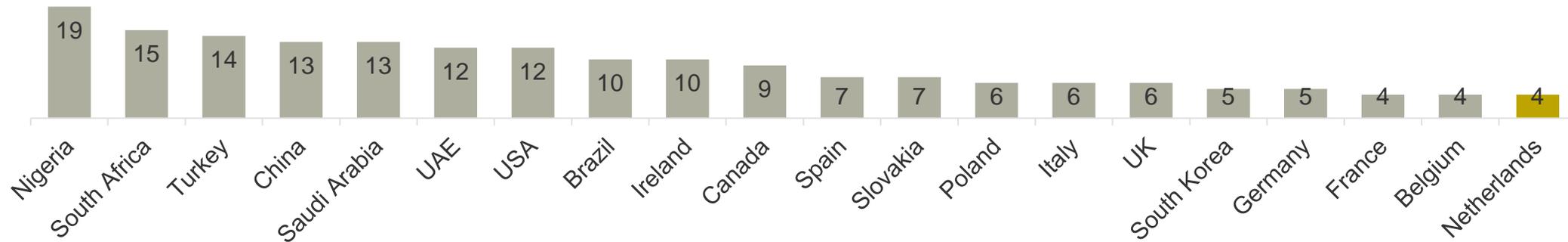
Confidence in a quick economic recovery after the corona crisis is relatively low. The phase of the outbreak in each country does however seem to play a role in this

"I believe the economy will recover quickly once coronavirus situation has died down"



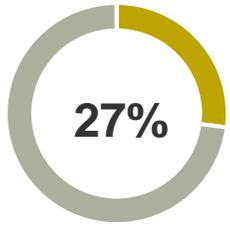
In most countries consumers claim not to have bought a lot of extra items

“I have bought a lot of extra items to be prepared in case I can’t get them due to the coronavirus situation”

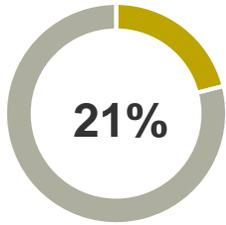


When searching for information about the coronavirus, Dutch consumers are particularly interested in information about diagnosis, followed by information around prevention

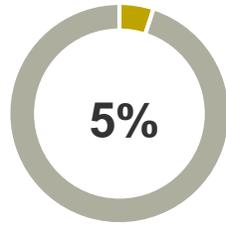
Diagnosis



What are the symptoms?

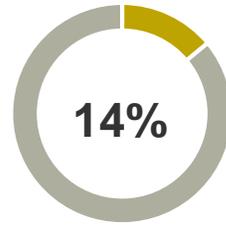


How likely am I to catch the virus?

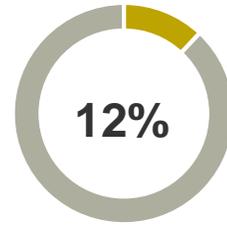


How do I self isolate?

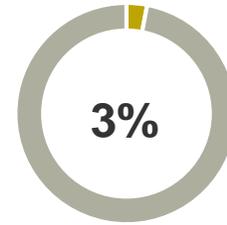
Prevention



How long does the virus live on surfaces?

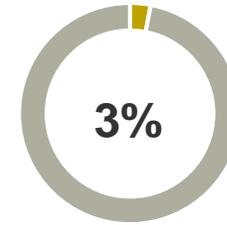


Who is at risk of severe illness?

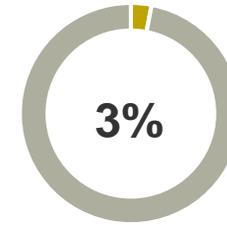


Am I at risk from products shipped from abroad?

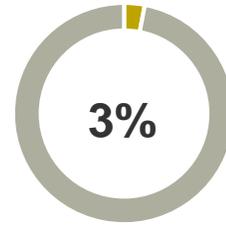
Behaviour



Should I travel abroad?



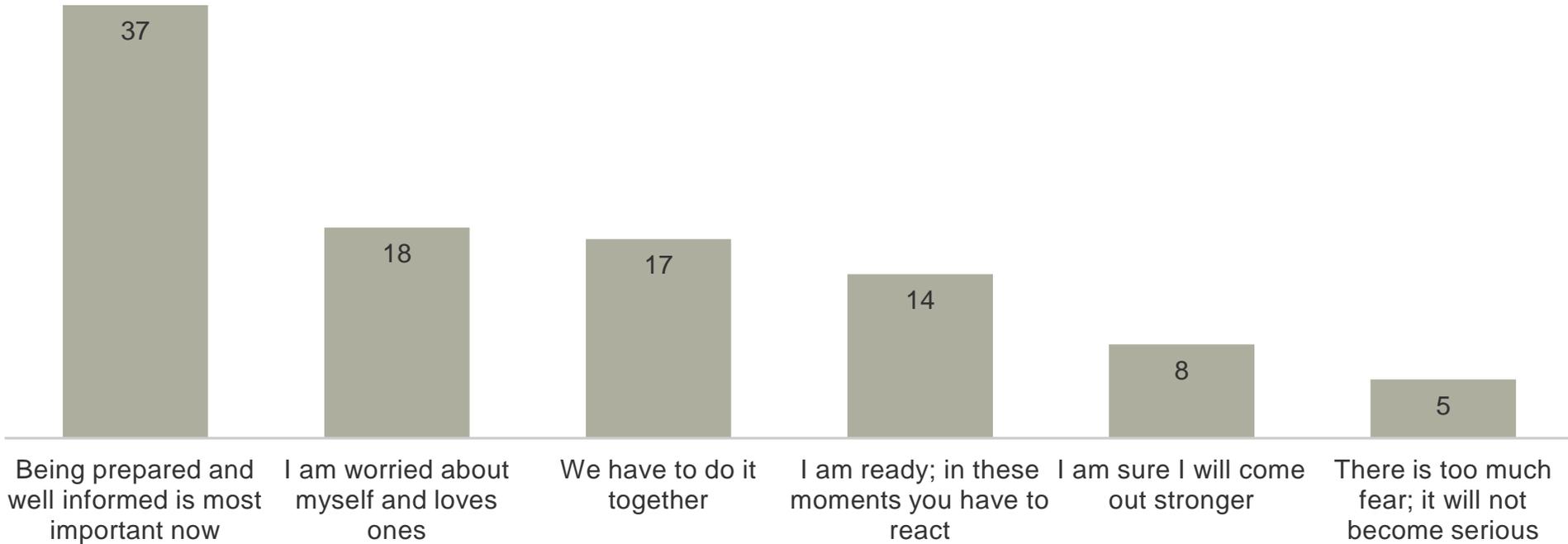
How should I wash my hands?



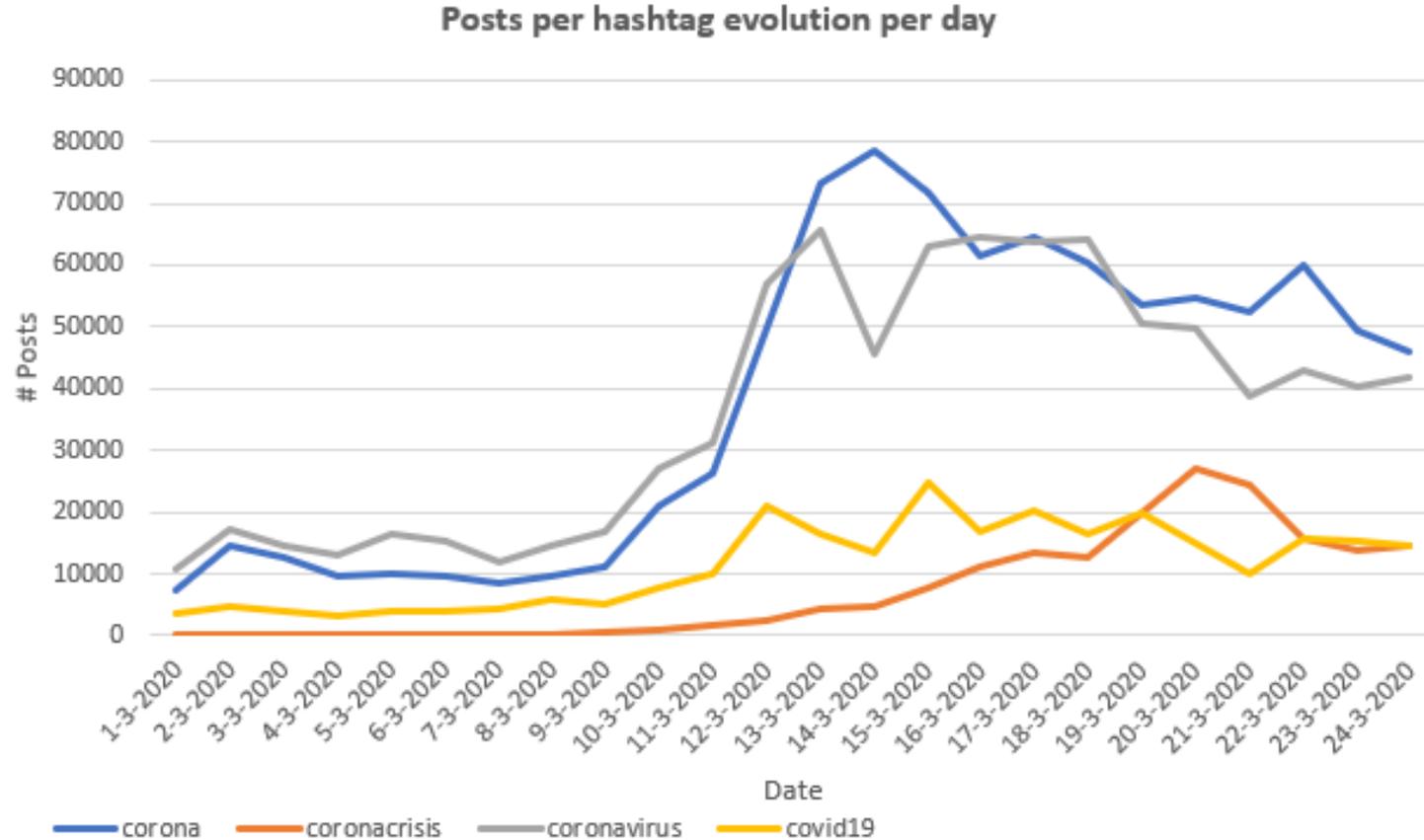
Should I wear a facemask?

And this search behaviour matches the current feeling of the Dutch, that being prepared and well informed is most important at the moment

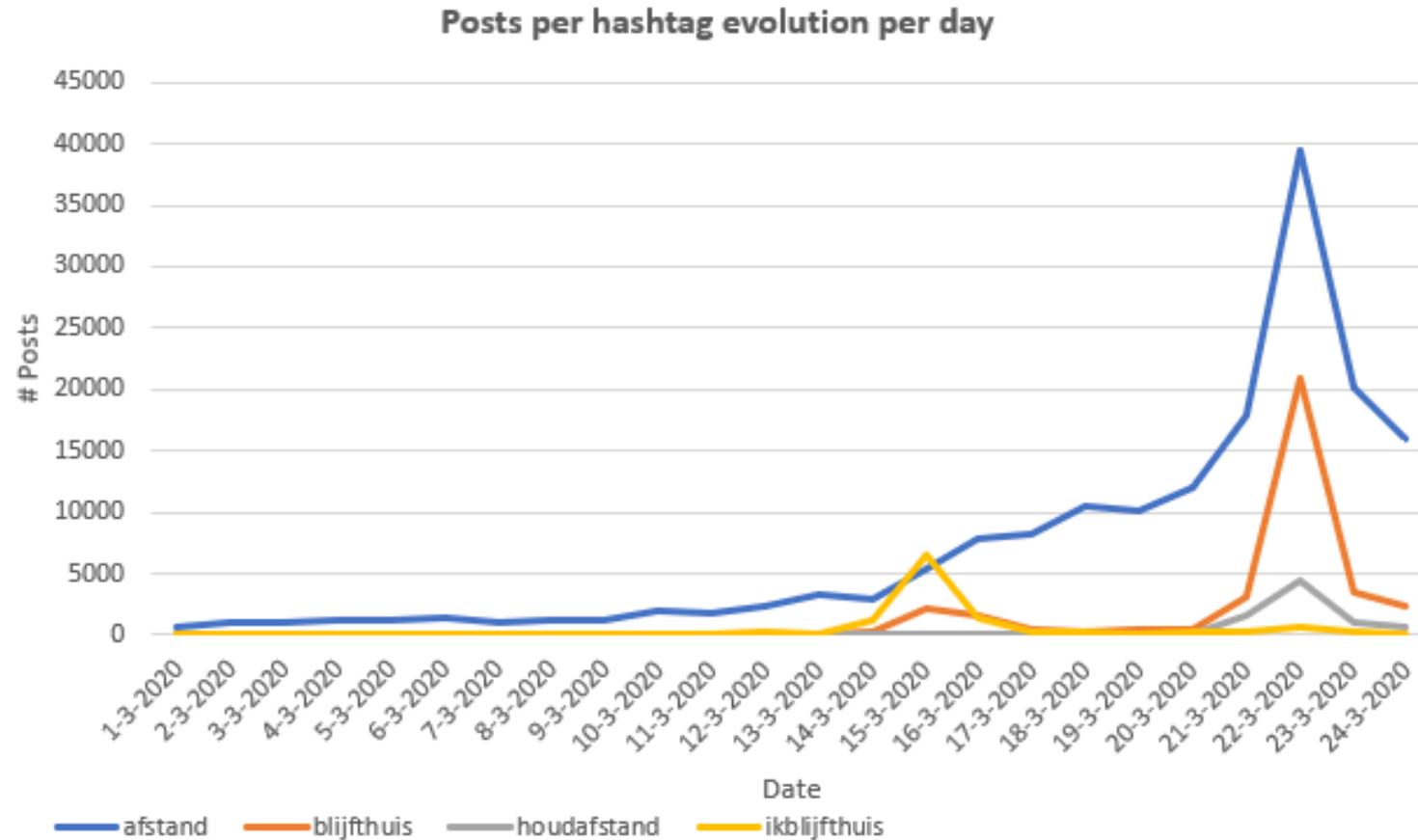
Which statement best describes your current feelings?



The elevated concern around corona virus can also be seen with the number of tweets in the Netherlands about corona rising steeply from 9 March onwards, with the highest peak on March 14



Keeping distance and staying at home showed a peak right after the weekend in which many Dutch decided to go to beaches despite government regulations



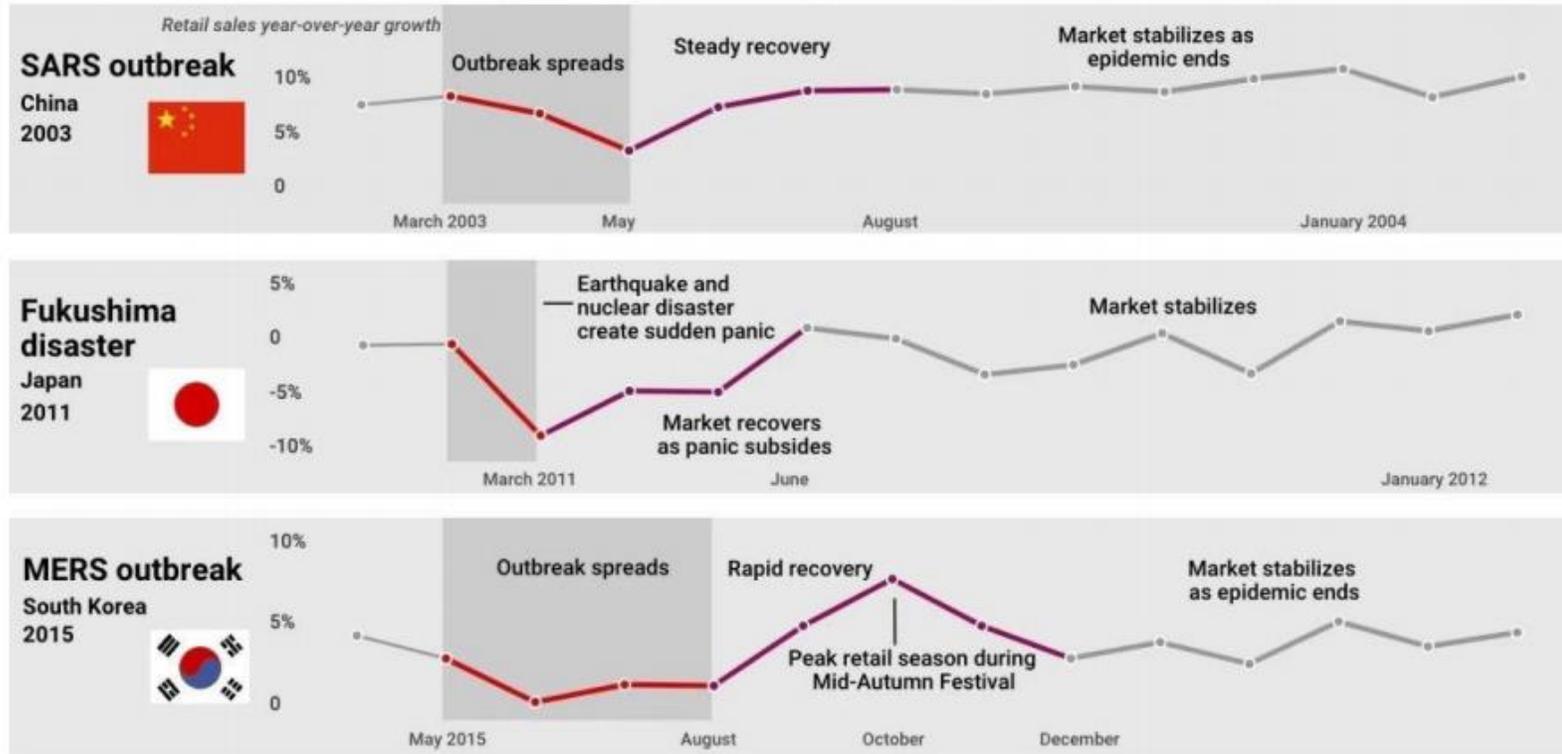


2
What are the
implications for
Brand Management?

**First of all, do not lose
sight of the long term**



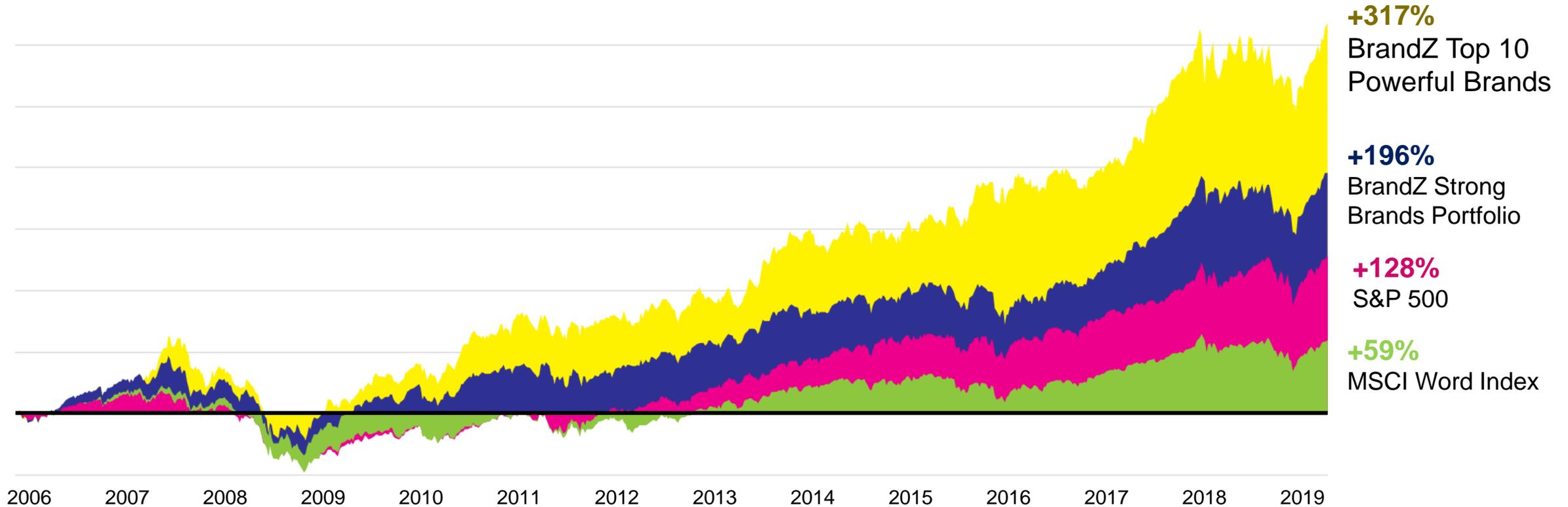
Previous epidemic/disasters have shown short term impact....



Sources: China National Bureau of Statistics; Japan Ministry of Economy, Trade and Industry; South Korea government statistics

....but generally recovery is seen over a period.

One big lesson we've learned from the 2008 crisis, is that strong brands recovered nine times faster



BRANDZ

Challenging times
require a disciplined
approach.

Brands must **develop**
a strategy that is in
line with the emotive
positioning of the brand
which will resonate with
people and ensure
aligned messaging



Consumer responses to situations like a crisis are not generic. They are emotional and depend on personality.

Put yourself in your consumers shoes.

How do they feel, what do they do, what help might they need?

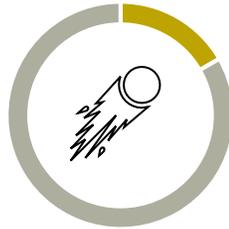
Dutch consumers don't want brands to stop advertising but it mustn't be seen as exploitative, inauthentic or inappropriate. Note that using humour is still possible (although tonality is of course critical)

Brands should...



34%

Be **practical** and realistic and help consumers in their everyday life



17%

Attack the crisis and demonstrate that it can be fought



15%

Be an example and **guide** the change

Advertising should...

Put themselves in the consumer's position. Be sincere and be yourself, in line with existing brand values

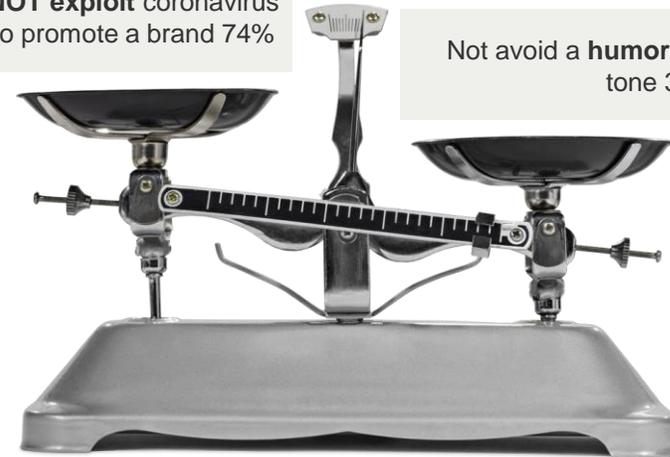
NOT exploit coronavirus to promote a brand 74%

Show how they can be **helpful** in the new everyday life 70%

Inform about their efforts to face the situation 61%

Use a **reassuring** tone 60%

Not avoid a **humorous** tone 30%



Also internationally consumers want brands to help and comfort them and to lead by example. Consumers also agree this is not a time for brands to be (too) optimistic or unconventional

Brands should...



1

Be **practical** and realistic and help consumers in their everyday life



2

Attack the crisis and demonstrate that it can be fought



3

Be an example and **guide** the change



6

Be optimistic and think in an unconventional way

Brands should NOT

Only in the UK, consumers expect something different from brands:

1

Be **practical** and realistic and help consumers in their everyday life

2

Use **knowledge** to explain and inform

3

Reduce anxiety and understand consumers

Top 3 in the Netherlands, China, Italy, Spain, South Korea, Belgium, Brazil, Germany & France

Human strategies in a time of crisis

People are not all the same... there is not a single generic response to a time like this.

A NeedScope lens can help us understand how different people may respond.

We can also see how brands have responded to recent crises in each space.

These responses offer clues as to how brands can respond to the current crisis in ways that meet the emotional needs of their audiences.



A framework that can help to make sense of a time of disruption in a way that's aligned to your brands emotive positioning

How will your brand respond? How can you be relevant?

Avert and deflect

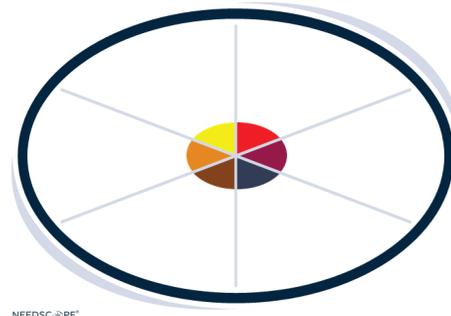
- Bringing laughter and smiles even in difficult times
- Be optimistic and confident the good times are just ahead
- Add light hearted commentary on social media to alleviate the fear and worry

Fight and activate

- Be bold with comments, calling out alarmist behaviour
- Demanding leaders to act immediately
- Be vocal on social media to stop misinformation

Collaborate and accept

- Getting on with the everyday, as little disruption as possible
- Be practical but realistic, be accommodating to change
- Contribute on social media to collaborative efforts that ease stress and fear of crisis



Strengthen and lead

- Lead by example, confident, do the right thing
- Look for opportunities to make a difference
- Use social media to effect change – direct, guide, encourage, inspire

Preserve and defend

- Offer support and comfort in time of need
- Be reassuring and sympathetic, consolatory advice
- Assuage fears through messages of hope on social media

Strategize and plan

- Acknowledge the situation and act with composure
- Provide sources of accurate information, facts and figures
- Conscientious use of social media to direct towards the truth

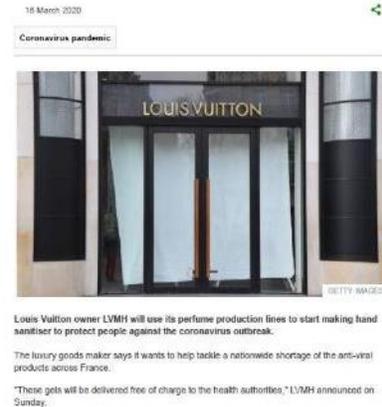
Some brands are taking the lead



Nike is sending out direct motivational messages: 'play inside, play for the world', encouraging people to use their apps to keep active and keep playing but for now play for the world.



Coronavirus: Louis Vuitton owner to start making hand sanitiser



Louis Vuitton took a leadership role and was amongst the first to turn its perfume production lines to hand sanitiser for health authorities. They have also stated they will honour this commitment as long as necessary.



Ford's 'Built for Right Now' messaging clearly reinforces that a brand which has been built over the decades for people who built the country, is now lending a hand to manage their credit.

While others are connecting with communities



Guinness recognized that St Patrick's Day would be different so sent feel good and supportive messaging to stick together and remember our communities.



How to Netflix and chill with friends in isolation using the streaming site's 'party' feature that lets you watch the same content AND chat in real-time

Netflix is extending their party feature so friends can watch the same content in real time, while social distancing. It gives viewers a virtual experience of being part of something and connecting with others.



East London brewery Signature Brew is getting creative to keep the beer flowing in people's homes, creating **The Pub in a Box**, hand-delivered by musicians who've had their tours cancelled (the will be paid London Living Wage).

Signature Brew is supporting the local communities and talent to give a bit of light relief to those who need it, creating a Pub in a Box.

It doesn't matter which positioning your brand has, there is a role you can play that is appropriate to what your consumers need

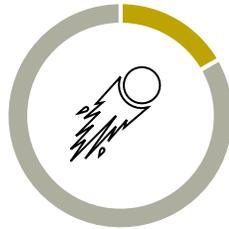
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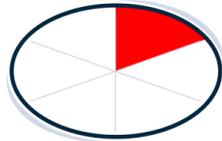
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Fight and activate



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Strengthen and lead



Advertising should...

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NOT exploit coronavirus to promote a brand 74%

Show how they can be **helpful** in the new everyday life 70%

Inform about their efforts to face the situation 61%

Use a **reassuring** tone 60%

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However, over 75% of the actions consumers want to see from companies in times of crisis relates to their role as an employer rather than their role in the wider community or their interaction with consumers

What should companies do in this moment of crisis?



Good Customer Experience starts with good
Employee Experience

Supermarkets and home delivery services are responding to this by ensuring employee and consumer safety by limiting their social contact and interaction

Albert Heijn zet caissières achter tafelzeil als bescherming tegen corona

17 maart 2020 15:00



Supermarket Albert Heijn already took this measure on March 17, a couple of days after the government tightened the rules again.



Nieuws

Coronamaatregel: Thuisbezorgd zet je eten op de stoep

13 maart 2020 • 08:12

Als je de komende tijd je eten laat bezorgen via Thuisbezorgd, neem het dan de bezorger niet kwalijk dat het eten op de stoep voor je deur wordt afgezet. Op die manier wil het bedrijf het gevaar op besmetting met het coronavirus verkleinen.



Home delivery service "Thuisbezorgd" also takes the new measures around corona seriously: the order is only placed at the door to limit personal contact.

5 Key Take-Aways for Brands

#1

Get the cue for your tone of voice from consumers.

Think ahead and take constant temperature checks so you understand the changing public mood and sentiment. Consumers need genuine responses that make sense to them in this current situation.

#2

Develop a consistent strategy.

Develop a brand strategy, in line with existing brand values. What are your consumers feelings and needs in challenging times, what are they doing, what's relevant for them? Think about what kind of brand you are and what would be authentic for you to do as a brand

#3

Be an enabler of resourcefulness.

The Dutch are practical. Support consumers with ideas, products and services that help them adapt to their new everyday life. Also reassure consumers your products are safe.

#4

Be the employer brand that stands out.

Consider the health and safety of your employees a priority at all times like supermarkets did by providing safety screens. Also explore possibilities for employees to work remotely via digital communication tools and keep monitoring their needs and their mental and physical health.

#5

Do not avoid humor if that's already part of your brand DNA

The Dutch don't think brands should completely avoid humor in advertising. If a humorous tone was already part of your DNA you can pull this off. However, in difficult times like these you need to consider if the tone is appropriate and in line with the public mood.

3 How are we consuming?



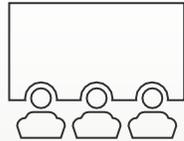
We know from observations of the situations in the Netherlands and China that consumer behaviour changes during the COVID-19 crisis in multiple categories

For some categories, the current coronavirus situation will lead to higher sales, for some the situation means a negative impact on business results

Categories that see a negative impact



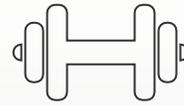
Out of home dining



Out of home entertainment



Out of home drinking



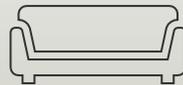
Sports facilities



Retail stores



Beauty facilities



Furnishing stores



Travel

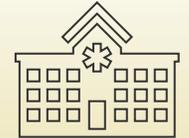
Categories that see a positive impact



Fast moving consumer goods



Health products



Health insurance



At home streaming



At home sports equipment

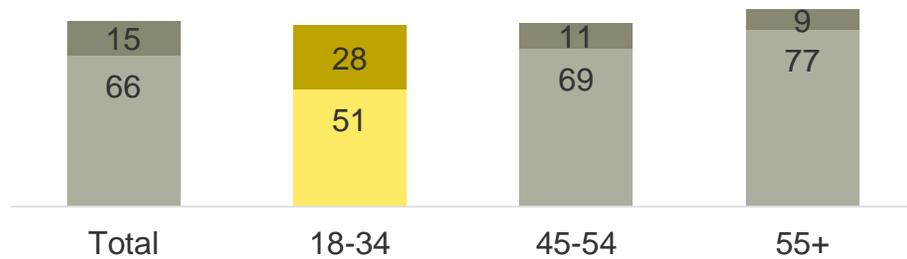


At home gaming

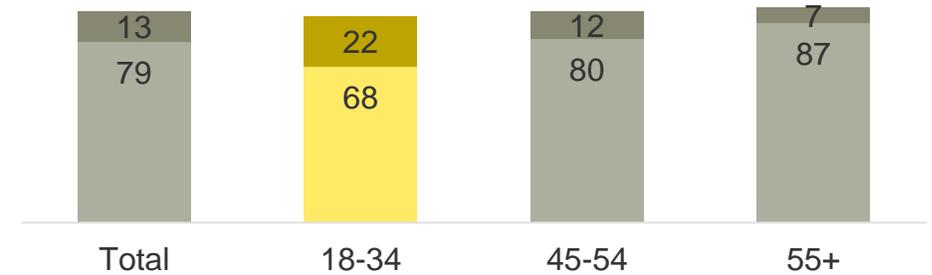
In terms of shopping, 2 in 3 consumers are shopping as usual across channels

18-34 year-olds seem to shop more than usual more often, both offline and online

Shopping at physical outlets



Shopping at online e-commerce websites



 Shopping more than usual
 Shopping as usual

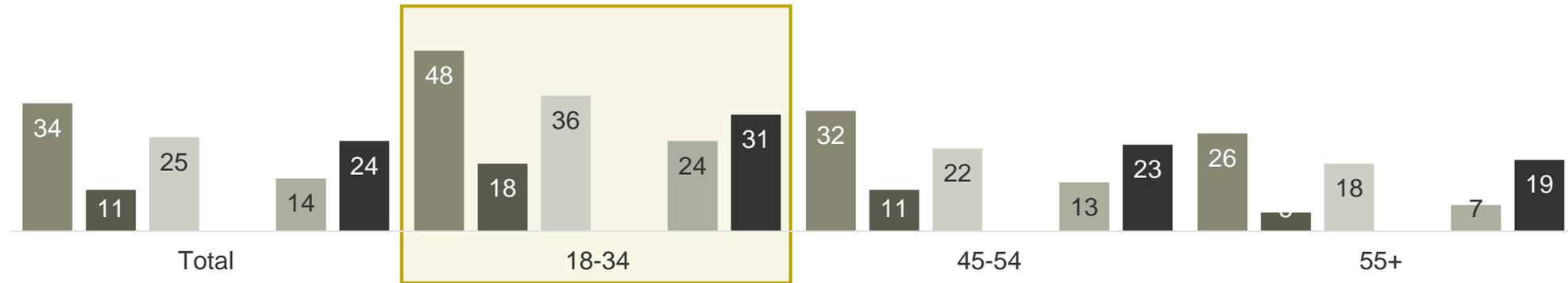
Expected future shopping behaviour online



Consumers aged 18-34 also have the strongest expectation to shop even more online in the future.

We see an increase for the purchase of 'stock up' products, especially consumers aged 18-34 have been purchasing these products more

Purchase more of and pay more attention to than usual



Long-shelf-life food



Beverages



Sanitizing products



Product origin



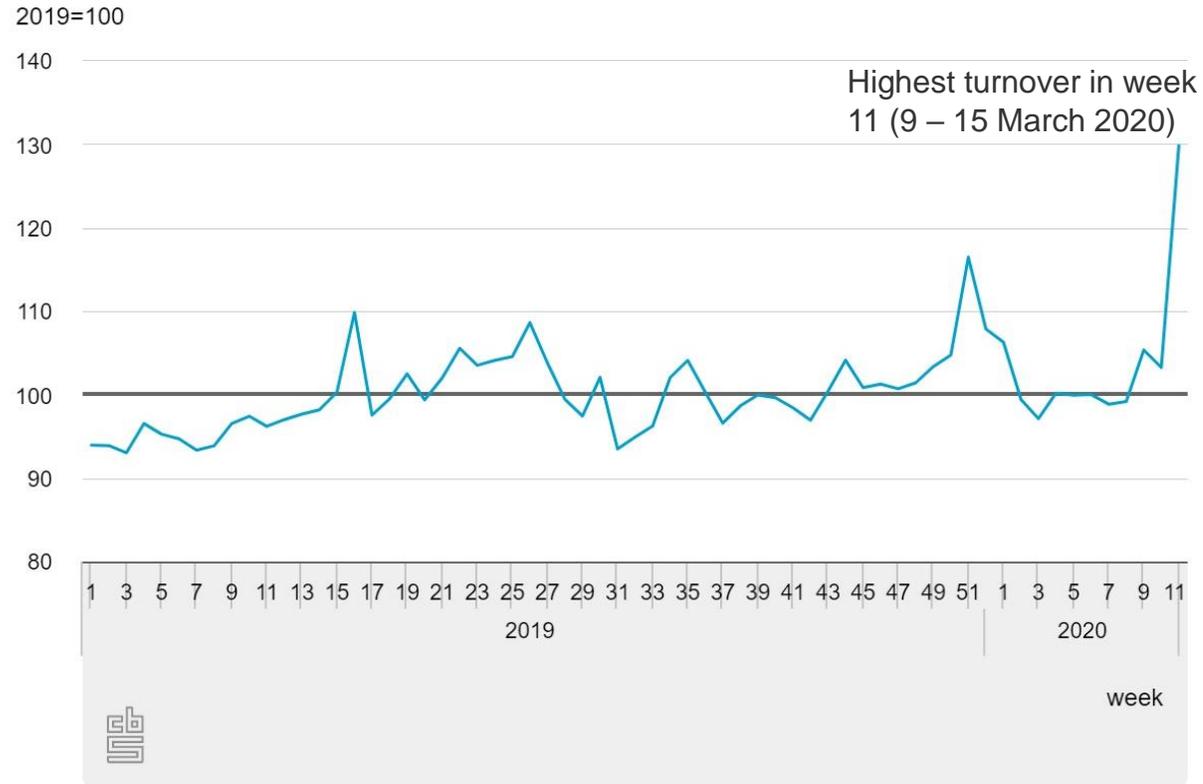
Products on sale

18-34 year-olds feel **financially less secure** than older consumers, as they think that the situation demands a more proactive financial planning. They also believe less than older age groups that **the economy** will recover quickly after the corona crisis. They also state more often than older consumers to have **bought a lot of extra items** to be prepared in case they can't get them due to the coronavirus situation.

Despite that the majority of consumers claiming to shop as usual across channels, there is a strong rise in turnover at Dutch supermarkets

Turnover at Dutch supermarkets, weekly

Sharpest turnover rise in long-shelf-life products and sanitizing products



Source: Statistics Netherlands (CBS)

Media headlines about hoarding

CORONANIEUWS

NOS

NOS NIEUWS • ECONOMIE • GISTEREN, 16:27

CBS: supermarktomzet hoger dan met Kerst door corona-hamsteraars

Bedrijven

rtlz

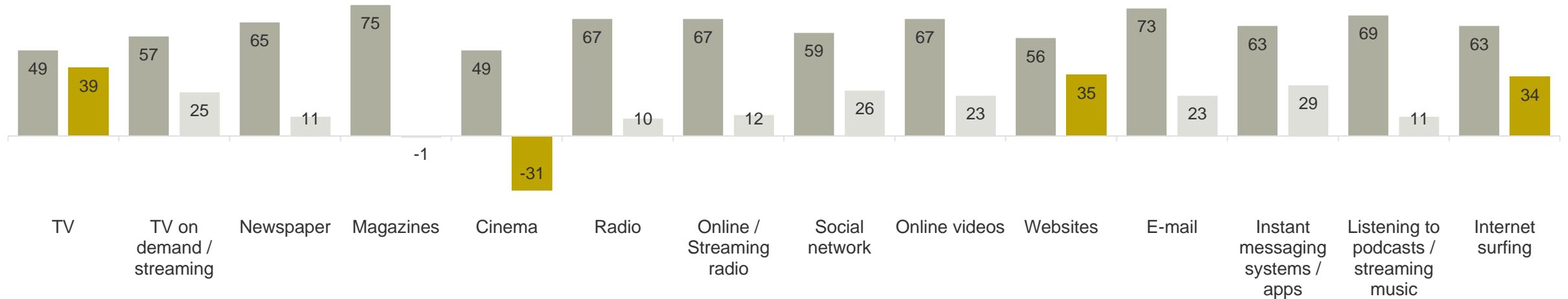
Omzet supermarkten door hamsteren hoger dan met kerst

In terms of media consumption, consumption in general is increasing due to limits on out of home activities, with TV and internet being the biggest winners

Changes in media consumption among users

The strongest positive impact on usage is for TV and online. The strongest decline is for cinema, in line with the government regulations due to which cinemas closed.

■ Stable usage ↕ Net score for increased vs decreased usage



In terms of most trustful sources for COVID-19 information, national media channels are by far the most important source

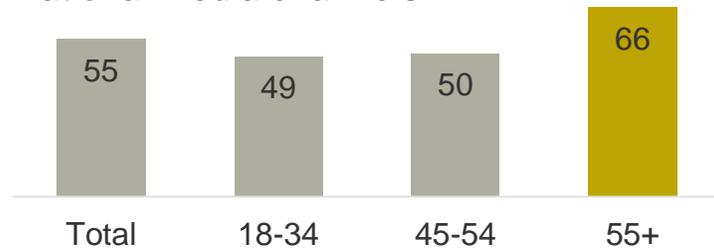
Average # of sources used for COVID-19 information



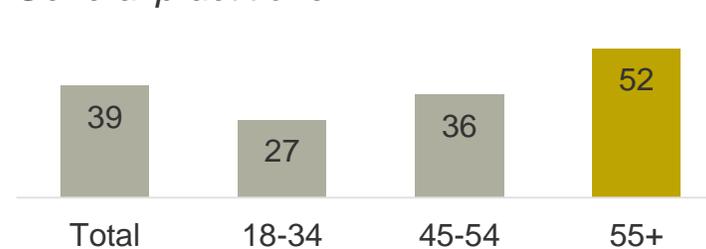
Top 3 most trusted sources for COVID-19 information

We see that the younger age group (18-34) tends to trust more on information from their immediate loved ones and acquaintances. Older consumers (55+) rely more heavily on health experts.

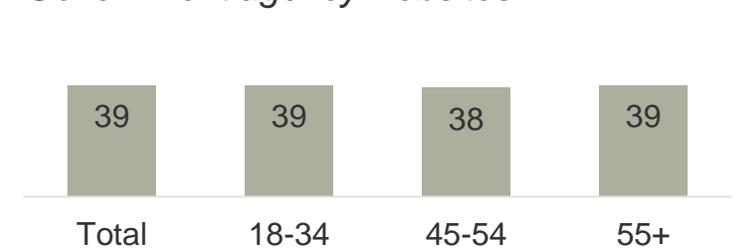
National media channels



General practitioner

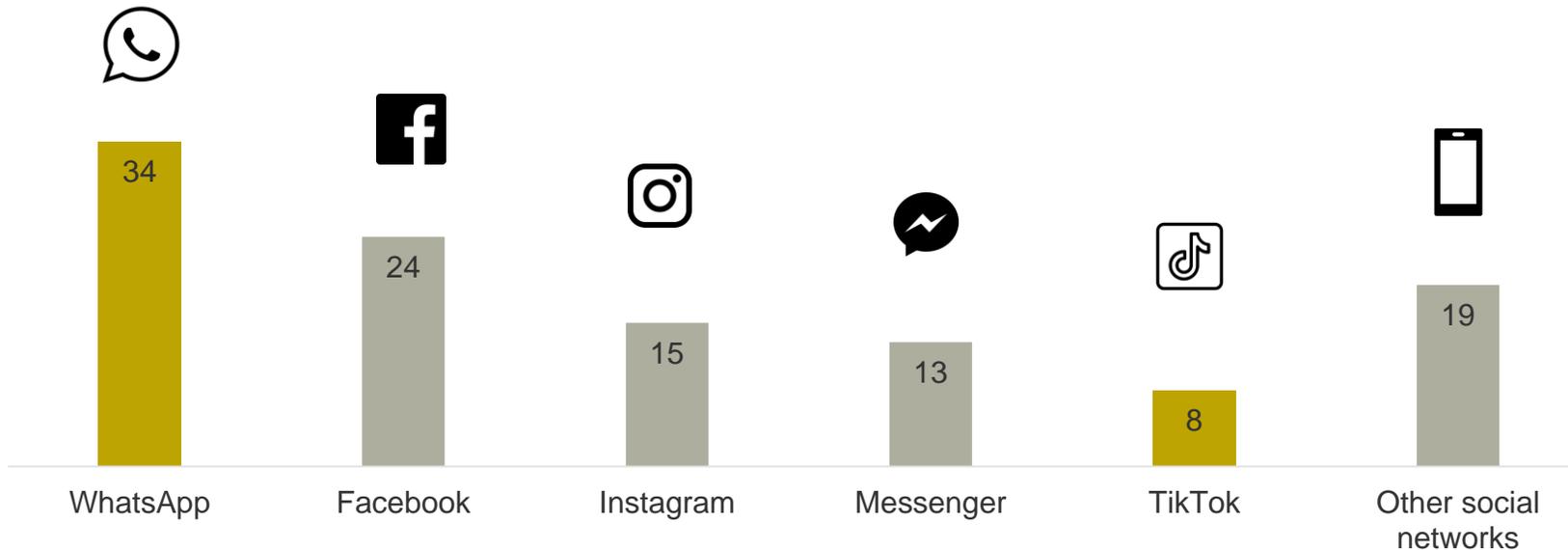


Government agency websites



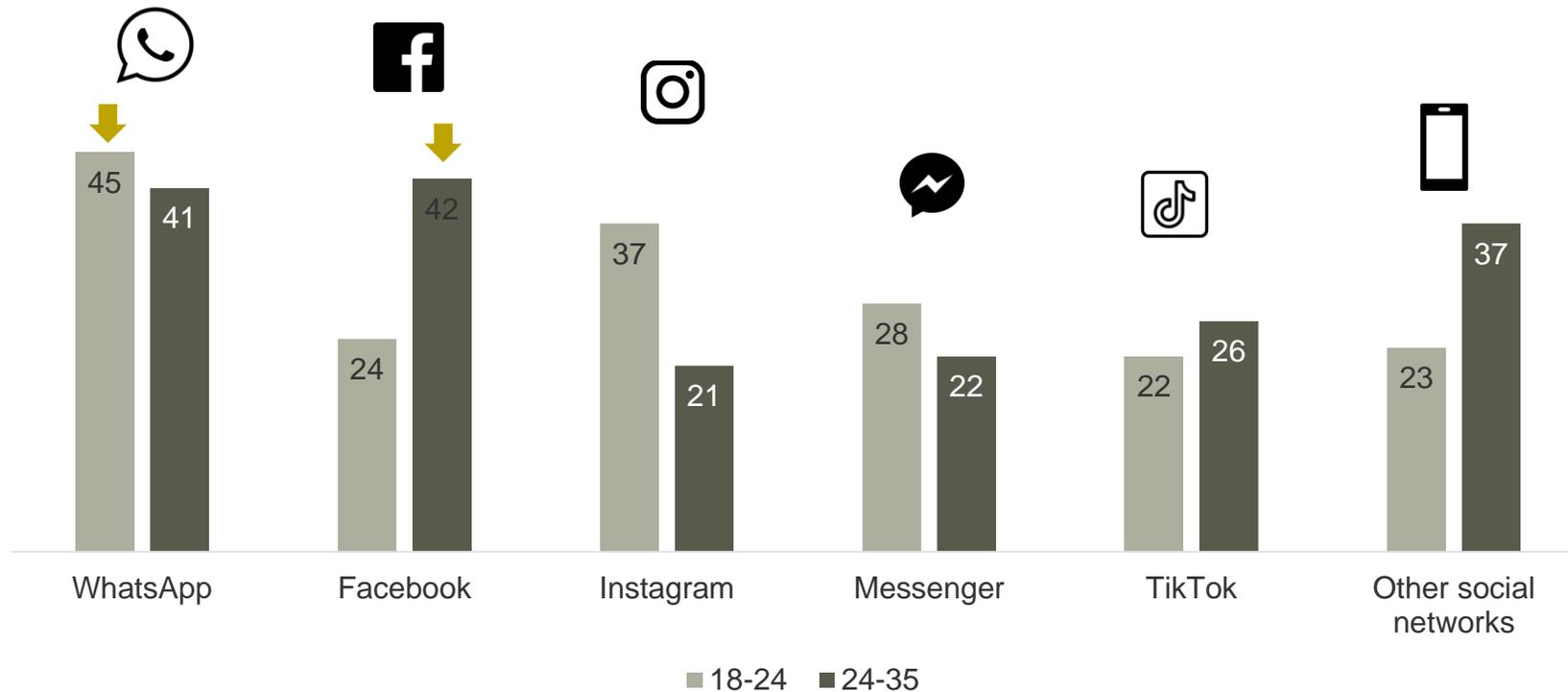
In terms of social media usage, Whatsapp sees the biggest increase among users, while music app TikTok sees the smallest increase among its users

Increase in usage of social media platforms



In terms of social media usage among younger consumers, the strongest rise among age group 18-24 is Whatsapp usage, while 24-35 year-olds increase their usage of Facebook most

Increase in usage of social media platforms among young age groups

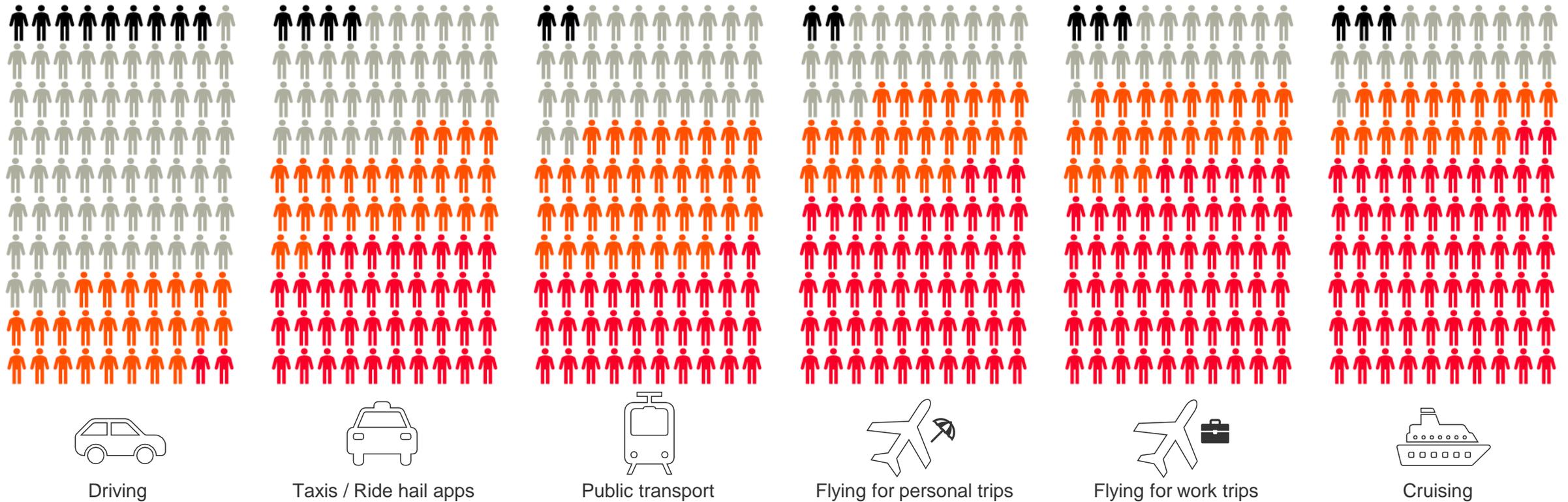


With the exception of driving, most transportation types are expected to be used two thirds less than usual in the near future



Lowest expected impact on usage

Highest expected impact on usage

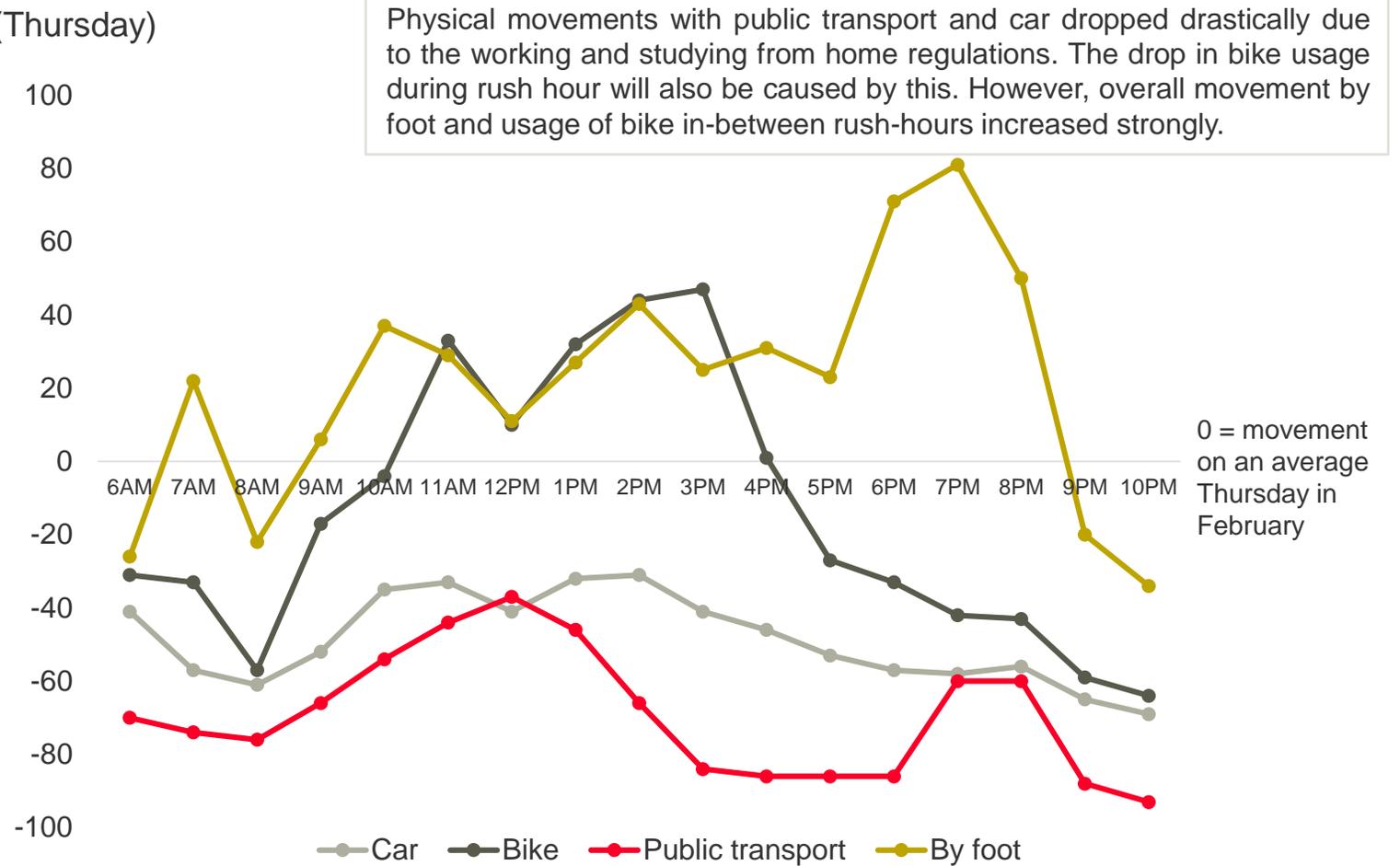


The Dutch Relocation Panel (NVP) shows a relatively low number of movements on a regular working day during the Corona outbreak

Physical movements in the Netherlands on March 19 (Thursday)

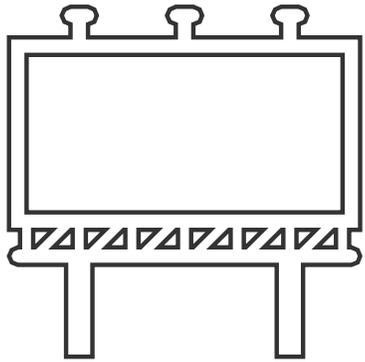


Source: Het Nederlands Verplaatsingspanel & De Volkskrant

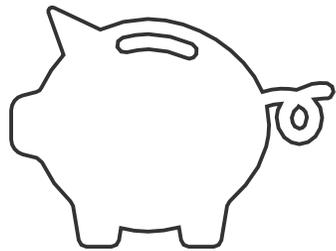


Source: Het Nederlands Verplaatsingspanel

Cancellation of OOH campaigns, due to strong decline in outdoor movement, is an opportunity to invest in media that sees an increased consumption

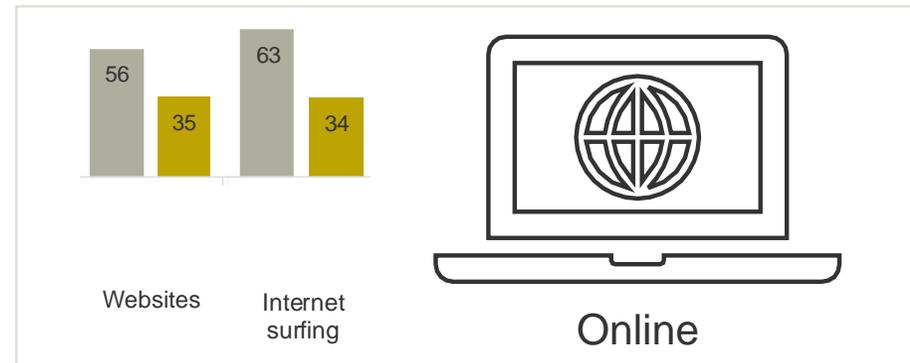
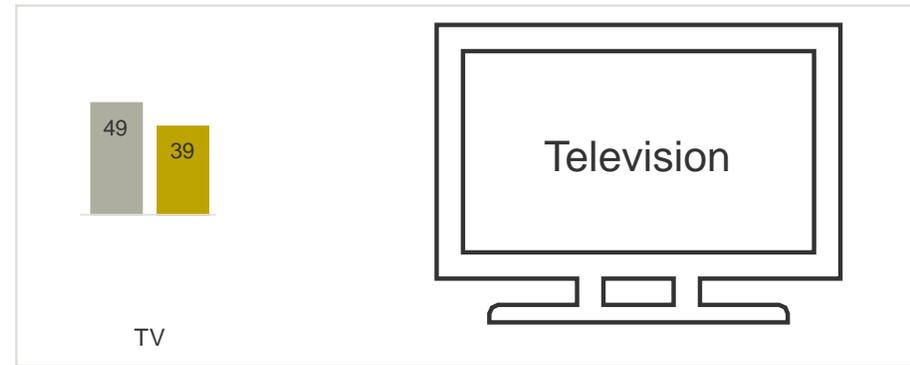


Due to the strong decrease of outdoor movement in general and commuting specifically, OOH campaigns have been cancelled on a large scale



Ideally, the budget would be used to strengthen saliency and build brand equity. The budget could be relocated to media that sees a strong usage increase

— Stable usage
↕ Net change usage score



32

Three battles that Dutch retailers have survived this week by quickly responding to the tough reality while keeping an eye on the consumer

The battle to make sure everyone can work/learn/play (online) from home



KPN helpt kinderen aan wifi voor hun schoolwerk

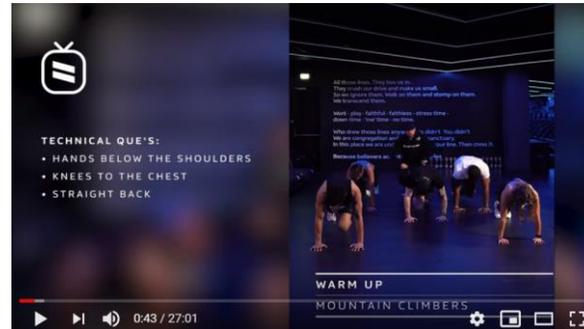
Veel scholen hebben de afgelopen dagen hard gewerkt om het onderwijs online te krijgen. Met mooi resultaat. Kinderen kunnen online blijven leren, chatten met hun leerkrachten en bij de kleuters is er 's ochtends een online kringgesprek. Helaas zijn er nog steeds kinderen die thuis geen wifi hebben, omdat daar geen geld voor is. Deze kinderen horen er ook bij!

Lees op de website van het Mooiste Contact fonds wat KPN voor deze kinderen doet.

[Meer informatie](#)

This is KPN in the Netherlands

The battle to stay healthy and fit



This is Saints and Stars in Amsterdam

The battle to accommodate the catering industry



TOO GOOD TO GO STELT APP BESCHIKBAAR

DINSDAG 24 MAART 2020

Too Good To Go schiet te hulp en stelt vanaf nu hun platform beschikbaar voor reguliere afhaalmaaltijden.

Met deze oplossing kunnen restaurants de gerechten blijven bereiden en halen gasten het met tussenkomst van de app veilig en snel af.

This is Too Good To Go Netherlands

Despite this hard time affecting all of us, many brands show positive actions to try to make the hard reality more bearable, for both citizens and entrepreneurs

New brand initiatives



Dutch webstore Bol.com offers books and stories for 1 cent for all children who must stay at home now



'Help de Horeca' a initiative by Heineken, Unilever, Grolsch and many more cooperating catering partners: showing initiative to support catering entrepreneurs



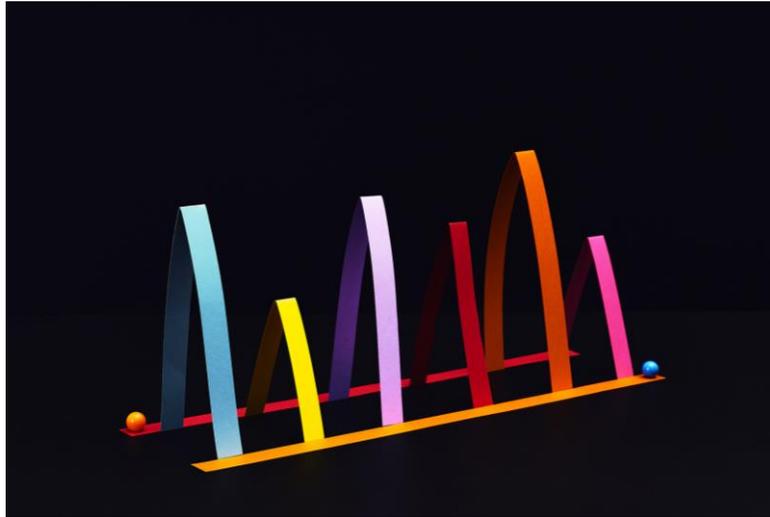
An initiative to support local deli, greengrocer and butchers: offering well-filled shopping boxes put together with the tastiest products that regions have to offer.

The insights you are looking at, were collected in Wave 1 of Kantar's global COVID19 monitor

This week (25/26 March) Wave 2 will start and we will continue to measure. The study is running in 50+ countries worldwide, and we add relevant new questions with every wave.

It has never
been more
important to find
the signal in the
noise

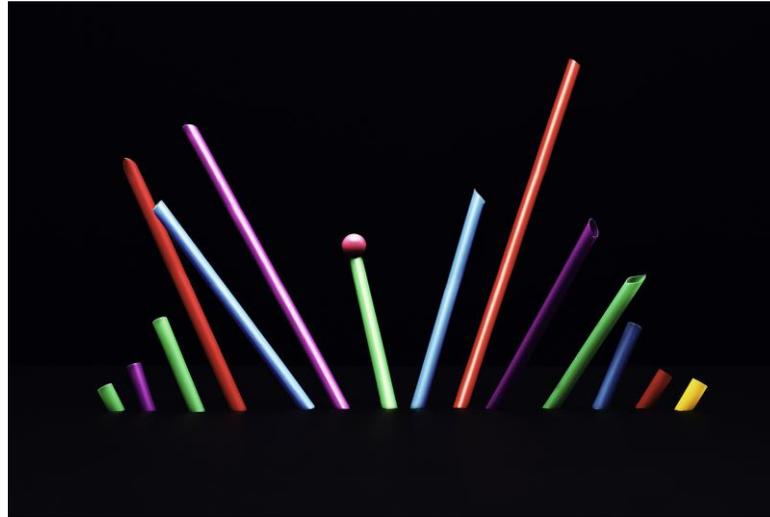
The right option for you...



Good

Get **all data** for **all countries** for **two waves** of the study. Helping you to understand the immediate impact of Covid-19 on your consumers.

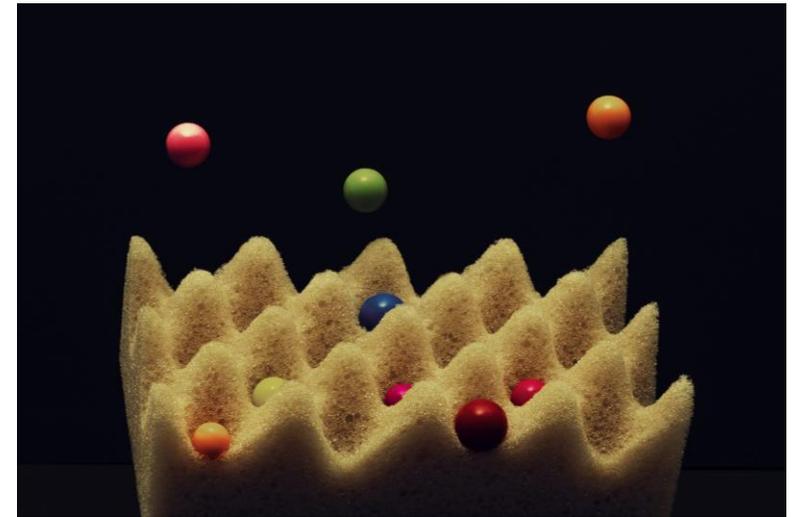
€6k



Better

The data for two waves PLUS a 120 minute digital workshop to help you and your business understand and react quickly to the changing situation.

€10k



Best

The data for ALL the waves (minimum four), PLUS a 120 minute digital workshop to help you understand and react quickly to the changing situation.

€14k

Want to know more? We're here to help



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Kantar interviewed 500 people aged 18+ in the Netherlands on March 18 and 19. They were interviewed online and were nationally representative in terms of age, sex and region.

Context:

COVID-19 had been in community transmission phase for over a week, with confirmed cases climbing from 2051 to 5560 (and deaths from 58-276) in one week.

The Dutch government asked everyone to work from home from now on and to stay inside as much as possible. The decision was also made to close all sports clubs, schools and the catering industry to minimise risk to vulnerable groups.

