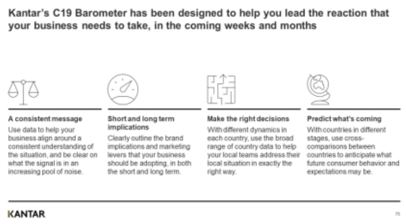
COVID-19 Barometer

The Netherlands

Wave 7

August 5, 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

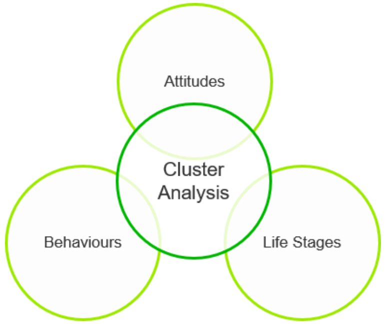
A consistent message
Use data to help your business align around a consistent understanding of the situation, and be clear on what the signal is in an increasing pool of noise.

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.

KANTAR 75



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

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

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

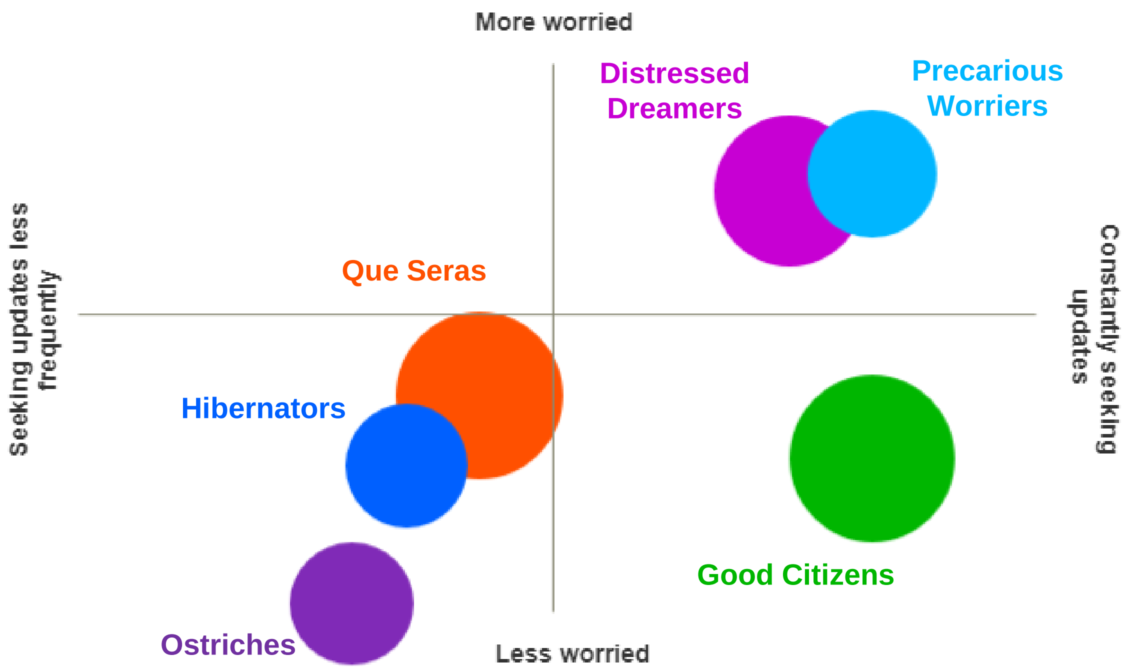
See page 3

Data from Kantar's BrandZ Top 100 Most Valuable Global Brands. BrandZ is the largest brand building platform in the world

See page 4

Kantar global created a global segmentation to identify groups of similar behaviors 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



BRANDZ

The largest brand building platform in the world

3.8m
Consumer interviews

17k
Brands

512
Categories

51
Markets

5.3bn
Data points

Step 01	×	Step 02	=	Step 03
Financial value ($)		**Brand contribution (%)**		**Brand value ($)**
Financial value created by a brand		Proportion of financial value generated by the brand's ability to increase purchase volume and charge premium.		

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MANAGEMENT SUMMARY

How are we feeling?

Compared to a month ago, the Dutch seem to have **become more accepting and less engaged** with the COVID-19 situation, as the group of Hibernators has grown at the expense of the Good Citizens, and the Que Seras (whatever will be, will be..) remains the biggest group.

At the same time, for the first time since end of March, general concern about the current situation remains stable (instead of declining), and **worry about falling sick continues to slowly increase**.

More accepting and less engaged: the Dutch seem to expect that **we will have to live with the corona virus for an extended period of time** and are adjusting accordingly. In an attempt to go ‘back to normal life’ as good as they can within the restrictions that are still in place, the Dutch take back control and put more faith in what they can do themselves (facemasks, social distancing).

Consumer behavior and expectations: now and beyond COVID-19

The Dutch increasingly expect brands to **be an example and guide the change**, which is now (for the first time) the most important thing brands should do according to consumers (especially for 35-54 y/o). Being practical is no longer enough; consumers want brands to take the lead in guiding them into a new reality in which COVID-19 will likely stay for a while.

All around the world, people are expressing **an appetite for change** and see ‘’post’’ COVID-19 as an opportunity for personal change, but also for tackling environmental issues. In this light, the overall issues that companies/brands should tackle (besides dealing with COVID-19) is **reducing packaging pollution, air/water pollution** and **waste.**

Returning to our pre-COVID-19 lives

Almost half of consumers who go to an office, are comfortable with returning to the office as soon as possible. Also, almost half is **comfortable to travel abroad within 2-3 months**.

While alternative solutions and safety remain main reasons for not returning to the office, safety of others and a sentiment of irresponsibility are growing.

Due to COVID-19, many public transportation subscriptions have been canceled or paused and many do not feel comfortable to go back to travelling with public transportation yet. **To reduce risk we feel more comfortable driving**, which could potentially have a positive effect on the car industry in the future.

RECOMMENDATIONS

Be an example & guide the change

Because the Dutch seem to become less engaged and more accepting of the situation, there's an **opportunity** for brands to be an example and guide the change into a new reality in which COVID-19 will likely stay for a while.

This means that most consumers do not only want brands to accept the situation as it, but also to **take back control, like they do**. Think of ways to put less (visible) emphasis on necessary changes due to COVID-19 restrictions, but rather embrace them as 'a new way of doing things'. Stay away from emphasizing the 'temporary' nature of changes and try to find the silver lining; point out some of the advantages without becoming too optimistic or ignorant. While acknowledging the situation, also make the experience of your products and services as frictionless as possible in this new reality.

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. **Stay on top of what these segments need**, as their needs continue to change over time.

There is an appetite for change but we need help

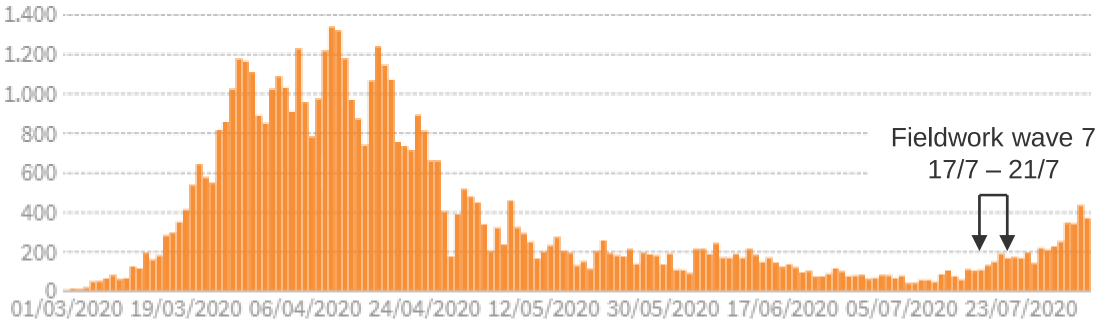
While politicians, economists and other commentators debate the shape and speed of the recovery and people everywhere try to resume their former freedoms, there is also **a clear appetite for change, leadership and greater resilience**.

Consumers expect responsible behaviour from brands/companies, both in terms of COVID-19 and wider world issues. Realize that responsibility and leadership are drivers of corporate reputation, which in turn drives brand equity. And because responsibility is now 3x more important to corporate reputation than 10 years ago, brands should acknowledge this as a topic that will likely become even more important in the future.

Find your way to contribute responsibly.

COVID-19 in the Netherlands during fieldwork period; there was a slight uptick in new cases, not yet bad enough for newly imposed restrictions, but the Dutch were warned the day after, at a press conference by secretary Grapperhaus

Number of new cases per day



The 22/7 press conference:

Grapperhaus: toename besmettingen ernstige waarschuwing

Het kabinet gaat de coronamaatregelen vooralsnog niet opnieuw aanscherpen, maar roept Nederlanders wel met klem op zich aan de coronaregels te blijven houden. “Het virus is nog steeds onder ons”, zei minister Ferd Grapperhaus (Justitie en Veiligheid, CDA) woensdagavond tijdens een ingelaste persconferentie. „Dit is geen goede ontwikkeling”, aldus Grapperhaus.

„De stijging van het aantal besmettingen is een waarschuwing, het is een stroomstoot die ons alert moet houden”, zei hij. Volgens het kabinet is het oplopende aantal besmettingen vooralsnog geen reden tot strengere maatregelen maar is het „wel een teken dat we ons aan de basisregels moeten blijven houden”. Op advies van experts wordt het dragen van mondkapjes in het openbaar nu niet verplicht, zei Grapperhaus.

20/7
15:57

Besmettingscluster in Hillegom gelinkt aan cafébezoek

In het Zuid-Hollandse Hillegom zijn zeker 23 coronabesmettingen gelinkt aan een café. Dat is gebleken uit bron- en contactonderzoek, meldt de GGD Hollands Midden maandag. De betreffende horecagelegenheid, De Kleine Beurs, moest vorige week de deuren al sluiten toen bleek dat meerdere gasten het virus hadden opgelopen.

20/7
22:11

Alle Schiedamse boa's in thuisquarantaine wegens coronabesmettingen

Zeker negen handhavers die de afgelopen weken „aan de frontlinie” hebben gewerkt in Schiedam, blijken het coronavirus te hebben opgelopen. Op advies van de GGD zit het volledige team Toezicht & Handhaving, bestaande uit zo'n vijftig medewerkers, twee weken in thuisquarantaine. Dat laat de gemeente maandag weten. Schiedam heeft daarom de komende veertien dagen geen eigen handhaving en zoekt naar vervanging.

Coronavirus laait op, Hillegom relatief gezien grootste besmettingshaard

Omroep West 21/7

1
How are we feeling?

1.1
Tribes segmentation

Kantar created a segmentation to identify groups of similar behaviours and attitudes towards COVID-19. These behaviours and attitudes influence what consumers do, feel and what they need from brands and advertising.

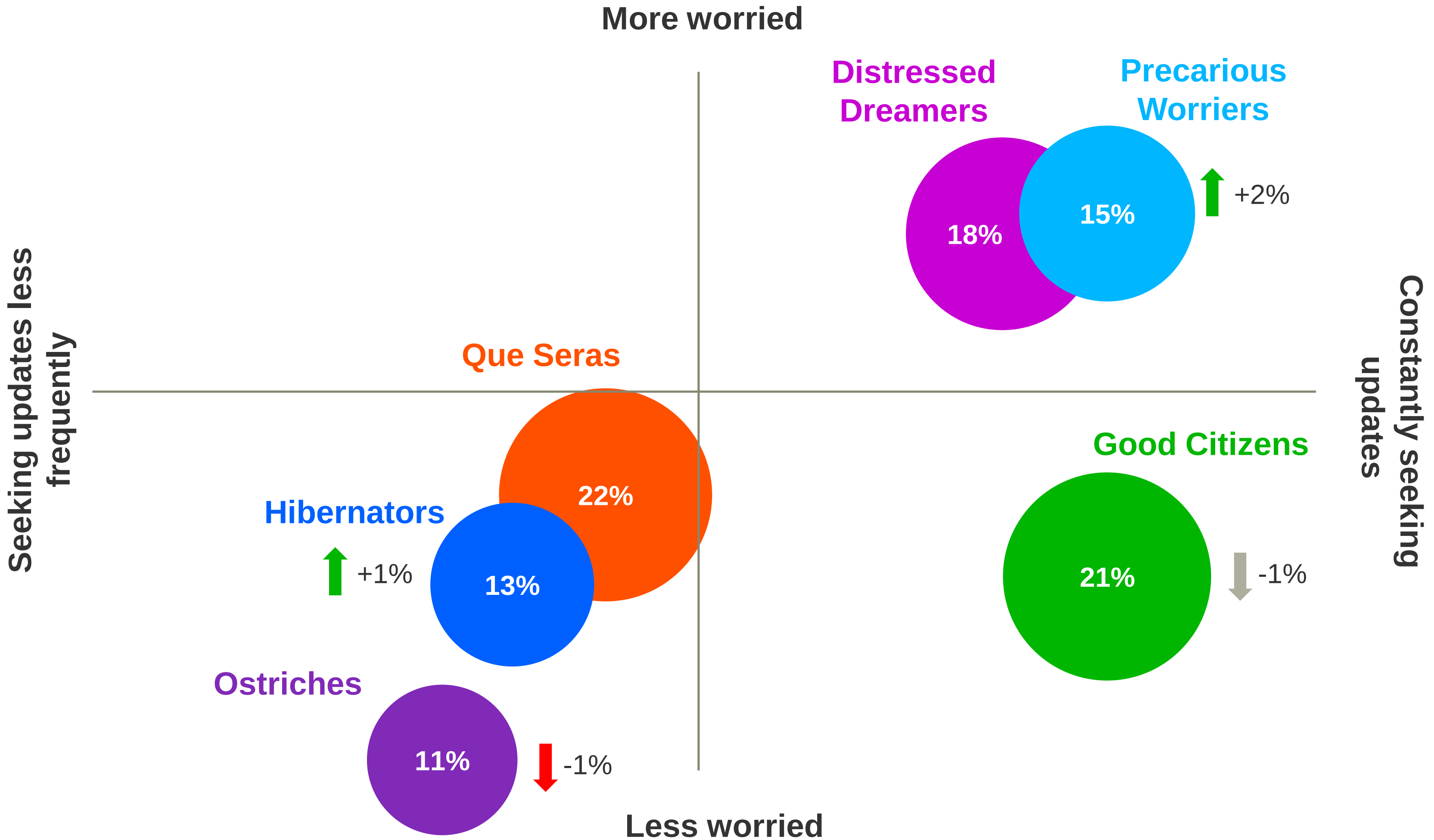
We monitor how the sizes of the segments develop over time.

First, meet our six global TRIBES

	Ostriches	Que Seras	Hibernators	Good Citizens	Distressed Dreamers	Precarious Worriers
	11	22	13	21	18	15
	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..*
Informed	✗	✗	✗	✓	✓	✓
Worried	✗				✓	✓
Follow the rules	✗	✗	✓	✓	✓	✓
Trust					✓	✗

C19 Global Barometer wave 7, July 17-21
* https://www.youtube.com/watch?v=xZbKHDPPrrc

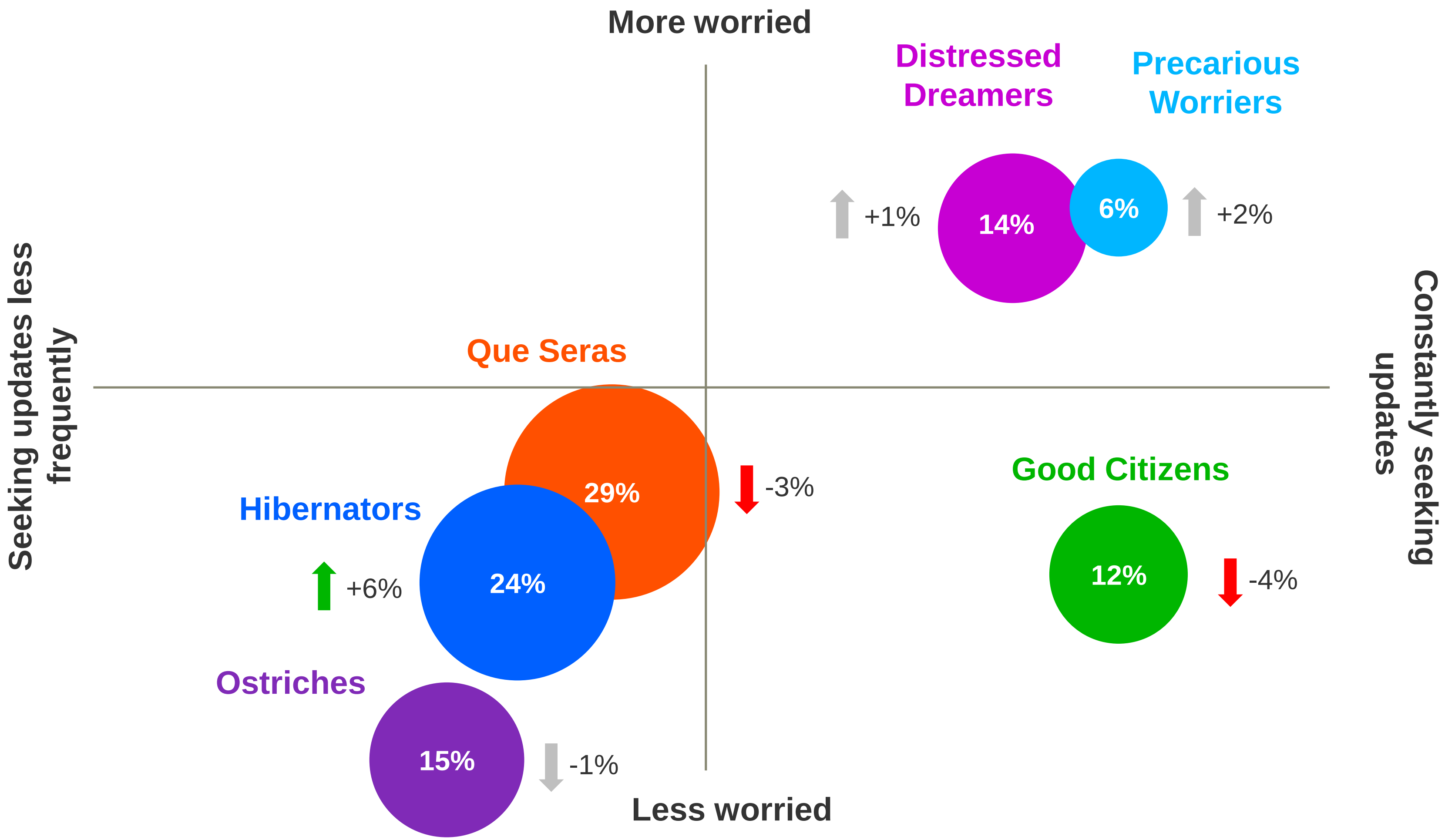
Globally, the Que Seras and Good Citizens remain the biggest tribes



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

In the Netherlands, however, the Que Seras and the Hibernators are the biggest tribes, with the latter growing (+6%) significantly, while the Good Citizens group decreases

This can mean that a larger proportion of the Dutch became more accepting of the situation but also less engaged



Compared to a month ago, we see the strongest differences for the youngest age groups. Gen Z seems to have become more accepting of the situation, with a decrease in Ostriches and an increase in Good Citizens and Hibernators. For Millennials, the group of Good Citizens decreased while the Hibernators increased; they tend to be less inclined to follow the rules

Wave 6

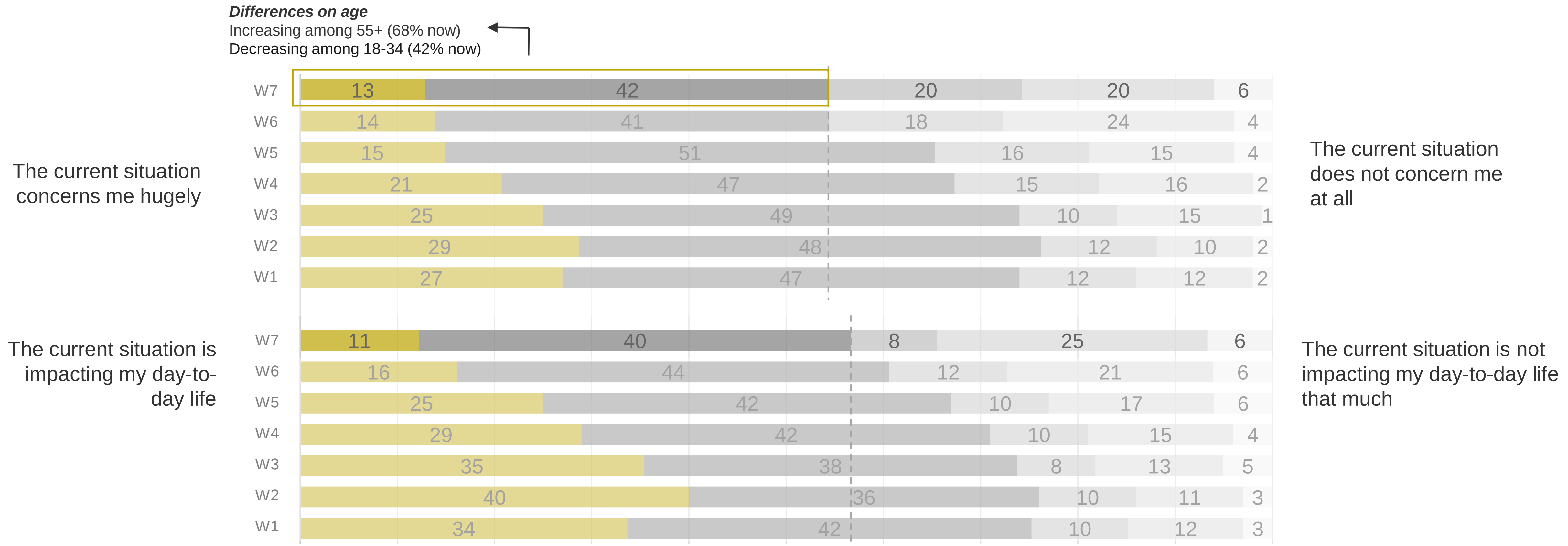
	Ostriches	Que Seras	Good Citizens	Hibernators	Distressed Dreamers	Precarious Worriers
Gen Z (18-24)	19%	37%	8%	22%	12%	3
Millennials (25-34)	25%	33%	13%	12%	12%	5
Gen X (35-54)	15%	34%	17%	14%	15%	5
Boomers (55-65+)	11%	23%	18%	23%	22%	3

Wave 7

	Ostriches	Que Seras	Good Citizens	Hibernators	Distressed Dreamers	Precarious Worriers
Gen Z (18-24)	13%	36%	12%	28%	10%	2
Millennials (25-34)	23%	36%	5	21%	11%	3
Gen X (35-54)	14%	31%	14%	23%	12%	6
Boomers (55-65+)	13%	22%	14%	25%	18%	9

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

For the first time since end of March, general concern about the current situation remains stable. The experienced impact on day-to-day lives on the other hand continues to decrease; now just over half of the Dutch is being impacted



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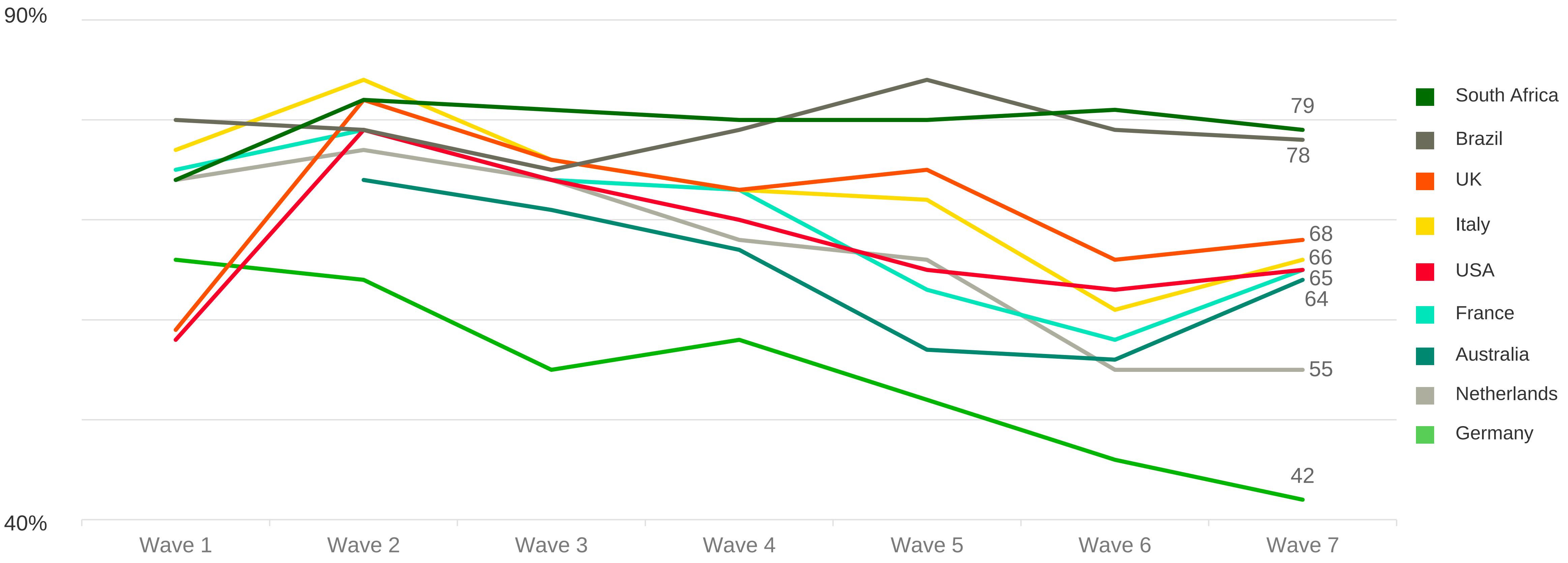
Looking at different markets, overall concern about the situation remains high but stable in most markets. Compared to previous waves, concern increased in France, Italy, UK, US and Australia, while only in Germany overall concern continues to decrease over time



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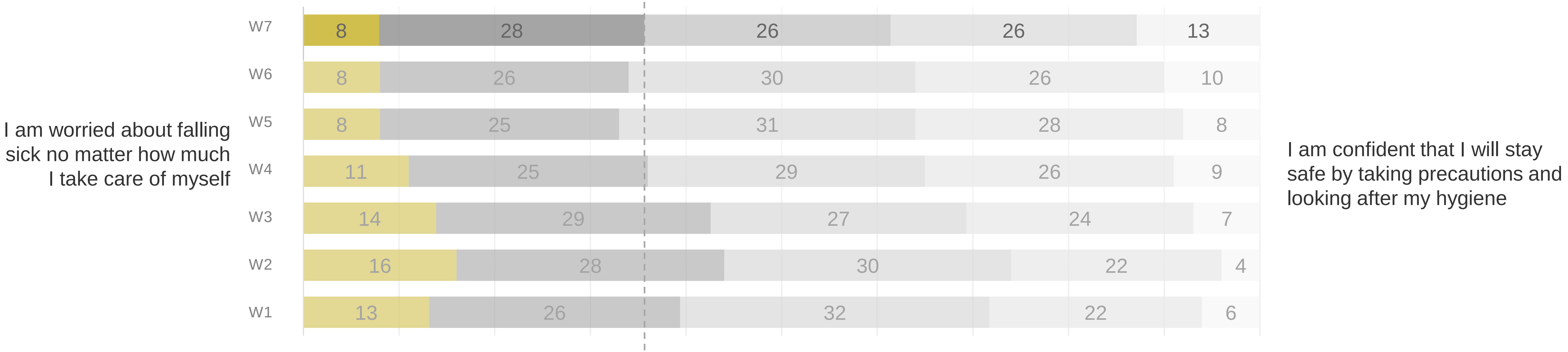
Q1: statement ‘’ “The situation concerns me hugely‘’; top2 answer

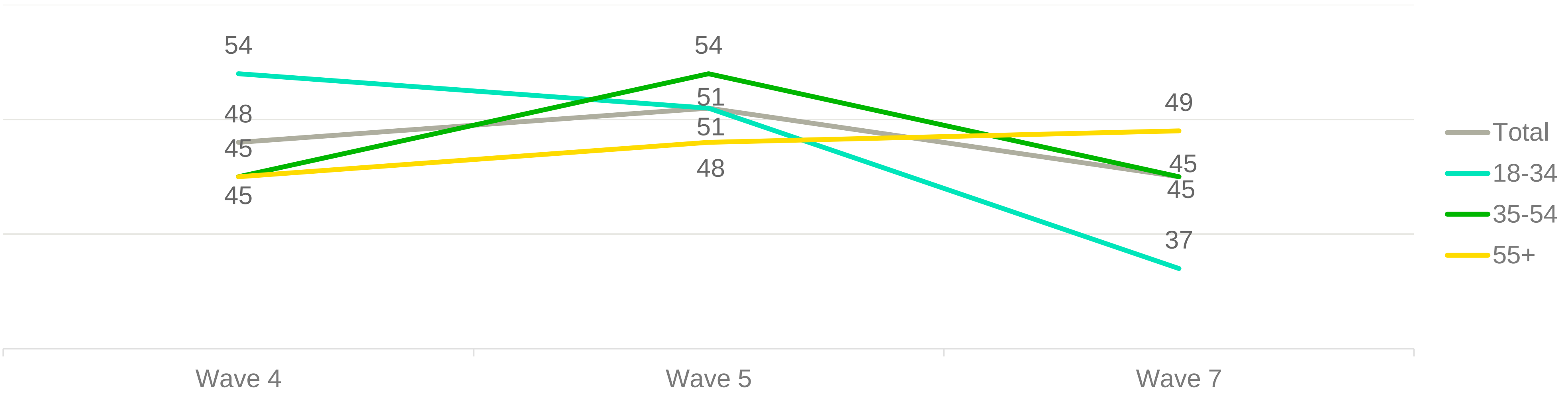
Worry about falling sick no matter how much people take care of themselves continues to slowly increase and is back on the level of end of April. While about one in three are worried about falling sick, roughly the same proportion feels confident they will stay safe



Increased fear of a new wave could explain an increase in worry about falling sick, but this fear is actually decreasing since end of May. Do note that on average almost half of the Dutch are worried that a new, similar critical period will come back in a few months

The decrease is strongest for the youngest age group (18-34 y/o), but also for 55+ fear for a second wave is stable

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

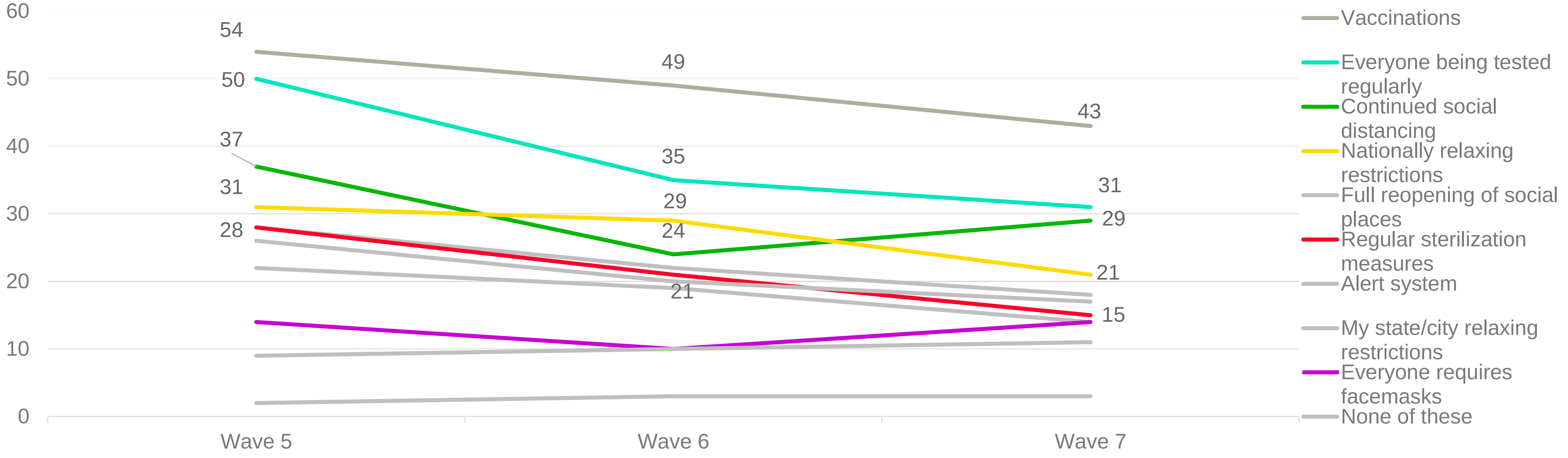


Q37: Once this emergency phase is over, how worried are you that a new, similar critical period will come back in a few months?

Shows Bottom2 data (very worried & somewhat worried)

The expectation that we will have to live with the corona virus for an extended period of time, seems to have moved consumers from looking at what ‘they’ can/should do to looking at what ‘I’ can do to safely return to normal daily life

Although vaccinations and regular testing remain the most important safety measures needed for many people, the importance of these measures decreases over time. At the same time, the importance of measures like social distancing and facemasks increases



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

While the Ostriches and Que Seras focus on what 'they' should stop doing (impose restrictions), the Good Citizens, Hibernators and Distressed Dreamers believe the only way to return to normal daily life is by implementing measures they can control (facemasks, distancing)

	Ostriches	Que Seras	Good Citizens	Hibernators	Distressed Dreamers
Most needed	**None of these**	**Vaccinations**	**Vaccinations**	**Vaccinations**	**Vaccinations**
Over index	1. Nationally relaxing/removing restrictions 2. My state/city relaxing/removing restrictions 3. Full reopening of social places	1. Nationally relaxing/removing restrictions 2. Full reopening of social places 3. My state/city relaxing/removing restrictions	1. Everyone required to wear facemasks 2. Alert system if I've been exposed to someone with COVID-19 3. Continued social distancing	1. Continued social distancing 2. Everyone being tested regularly for COVID-19	1. Continued social distancing 2. Everyone being tested regularly for COVID-19 3. Alert system if I've been exposed to someone with COVID-19
Under index	1. Everyone being tested regularly for COVID-19 2. Everyone required to wear facemasks 3. Continued social distancing	1. Continued social distancing 2. Alert system if I've been exposed to someone with COVID-19 3. Everyone required to wear facemasks	1. Full reopening of social places 2. My state/city relaxing/removing restrictions	1. My state/city relaxing/removing restrictions	1. Nationally relaxing/removing restrictions 2. Full reopening of social places

Q54: Which of the following would need to happen for you to feel safe to return to normal daily life? Base size for Precarious Warriors too low to take into account

Across markets, most consumers foremost need vaccinations to feel safe to return to normal life. Everyone wearing facemasks, regular testing and continued social distancing are also ways to feel more safe

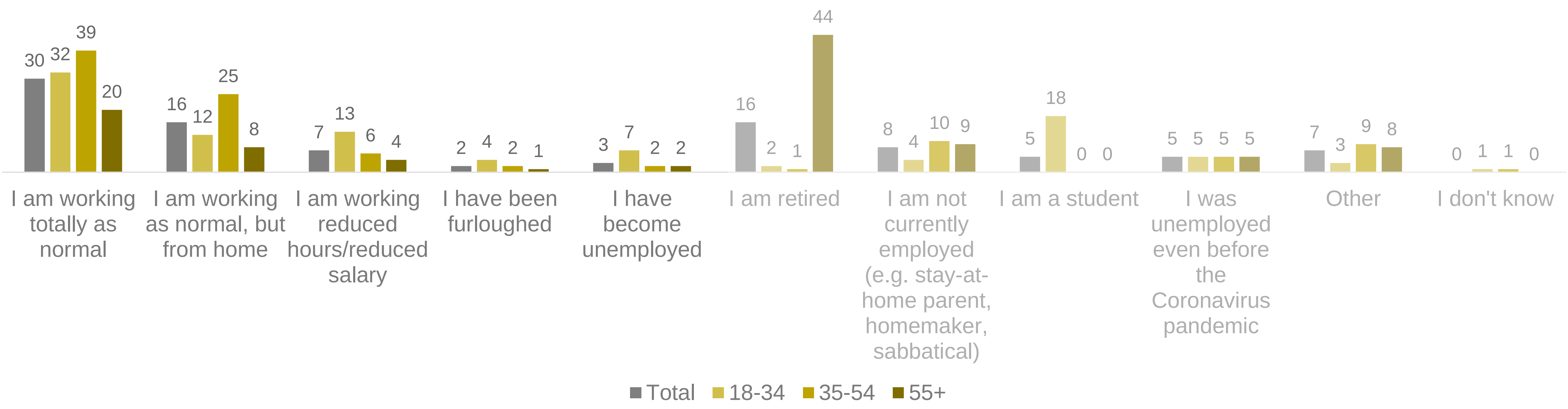
	NETHERLANDS	UK	USA	ITALY	GERMANY	FRANCE	CHINA
1	Vaccinations	Vaccinations	Vaccinations	Vaccinations	Vaccinations	Everyone required to wear facemasks	Everyone required to wear facemasks
2	Regular testing	Regular testing	Continued social distancing	Everyone required to wear facemasks	Regular sterilization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

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

1.3
Impact on income & employment

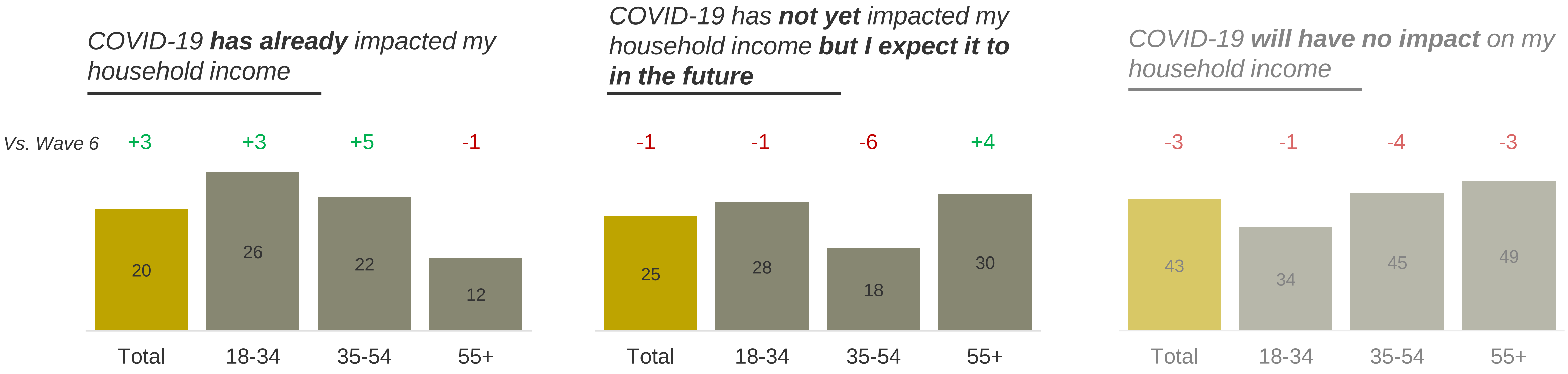
30% of the Dutch work totally as normal and 16% work normal but from home. 35-54-year-olds work mostly as they did before, either totally as normal or from home. Age group 18-34 is most impacted: they relatively often work reduced hours/salary and lost jobs

How has the Coronavirus epidemic impacted your employment?



Not surprisingly, the loss of hours/jobs impacted age group 18-34 y/o financially too. The expected impact on household income *in the future* is however highest among 55+

It is plausible that the lockdown hit the youngest age groups hardest because they are over represented in the sectors that were hit hardest, but that 55+ expects an impact from the economic crisis that is expected to follow the COVID-19 crisis



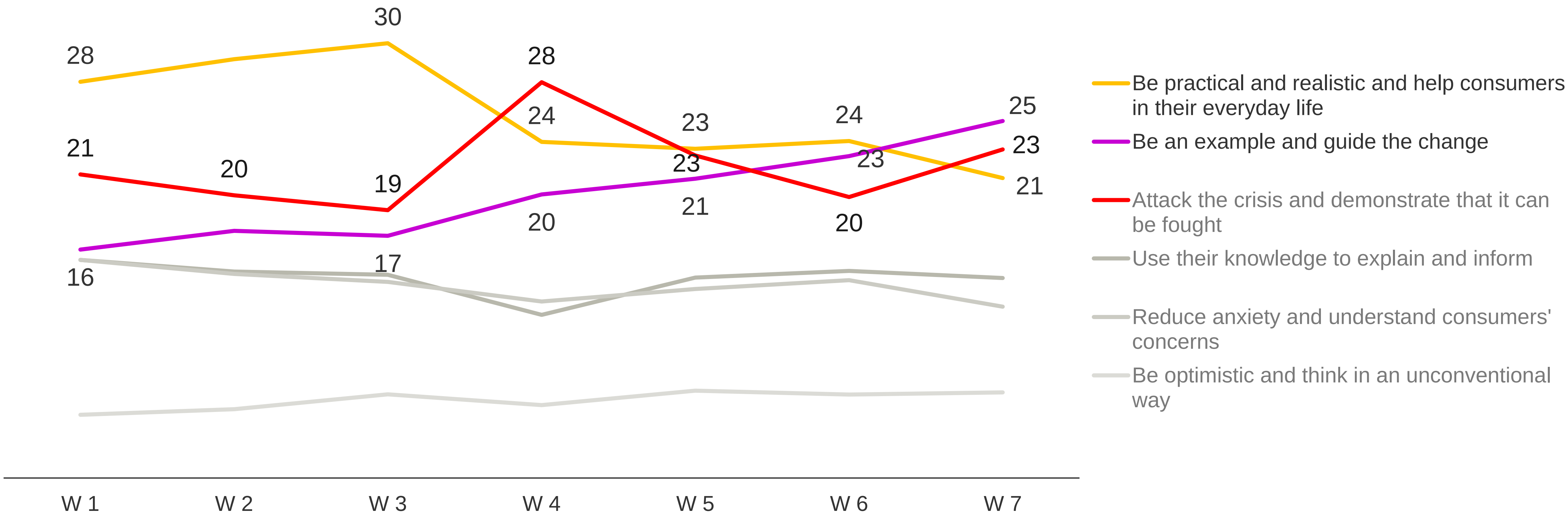
BARO-METER NL COVID-19

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

2
Consumer behaviour and expectations: now and beyond COVID-19

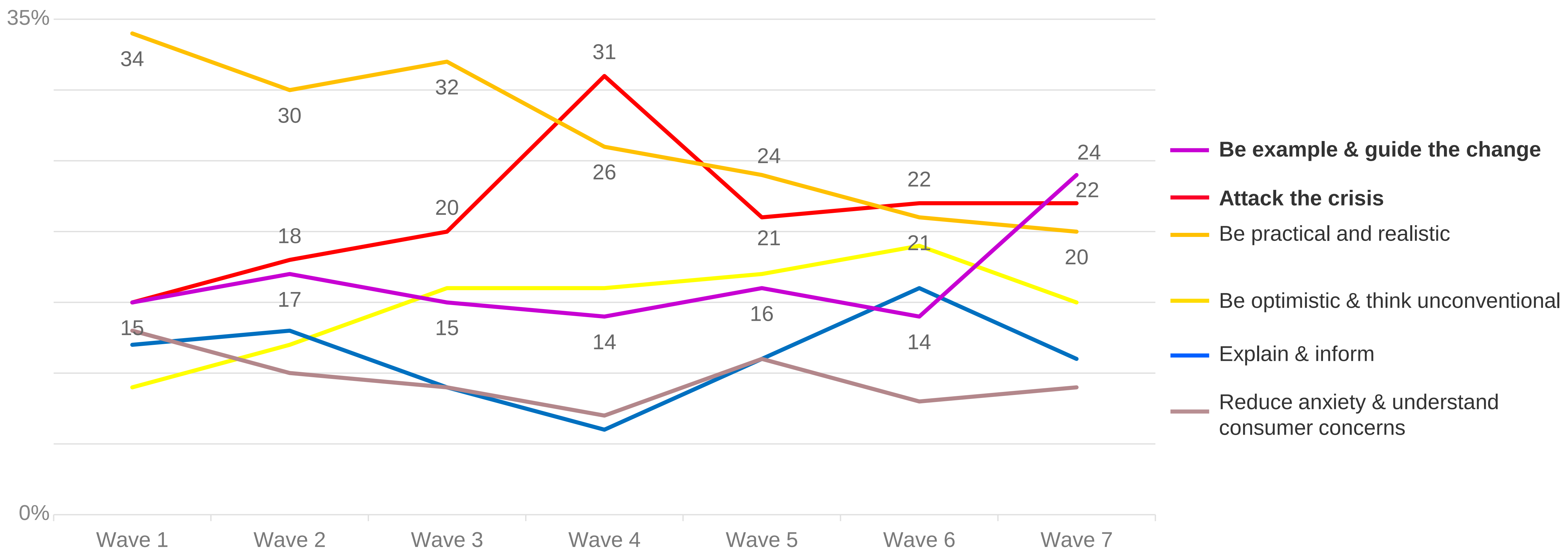
What do consumers expect from brands now?

Globally, consumers continue to want brands to step up, be an example and guide the change



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

The Dutch also increasingly expect brands to be an example and guide the change, which is now (for the first time) the most important thing brands should do according to consumers



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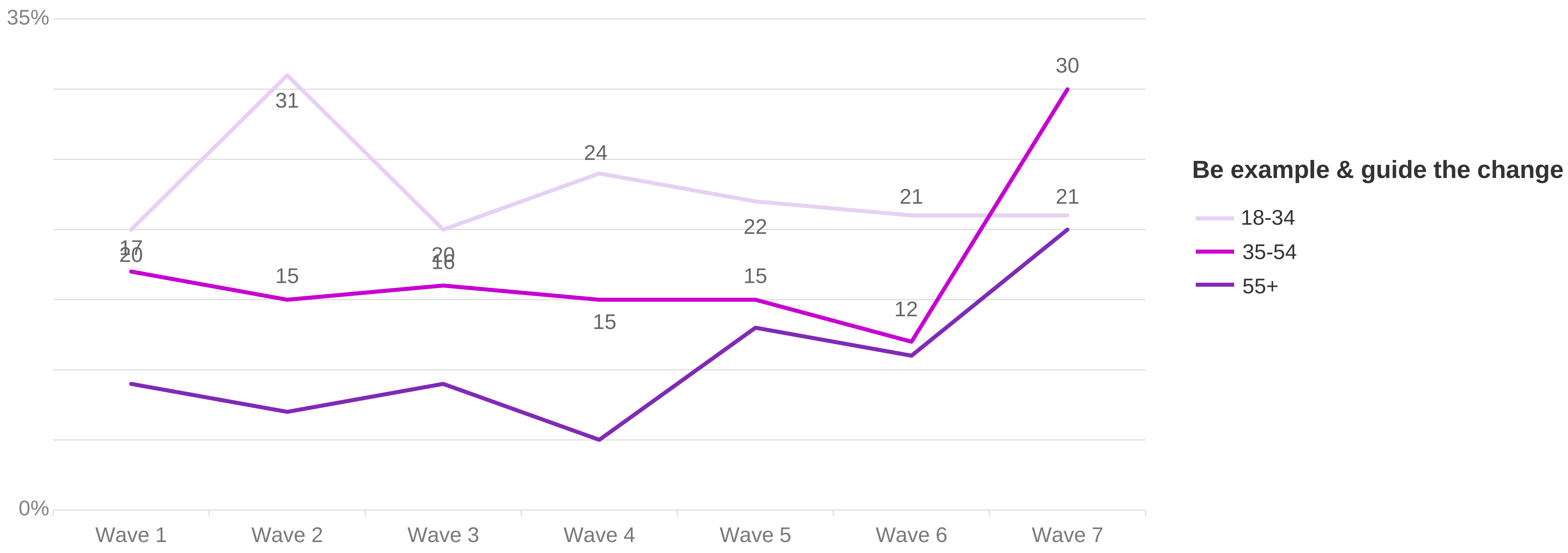
Q3: What is the main thing that brands should do at the moment? What other actions should be taken? Choose one of the following

Do note that there are some clear differences between age groups. The strong call for brands to set an example and guide the change comes mostly from 35-54 y/o Dutch



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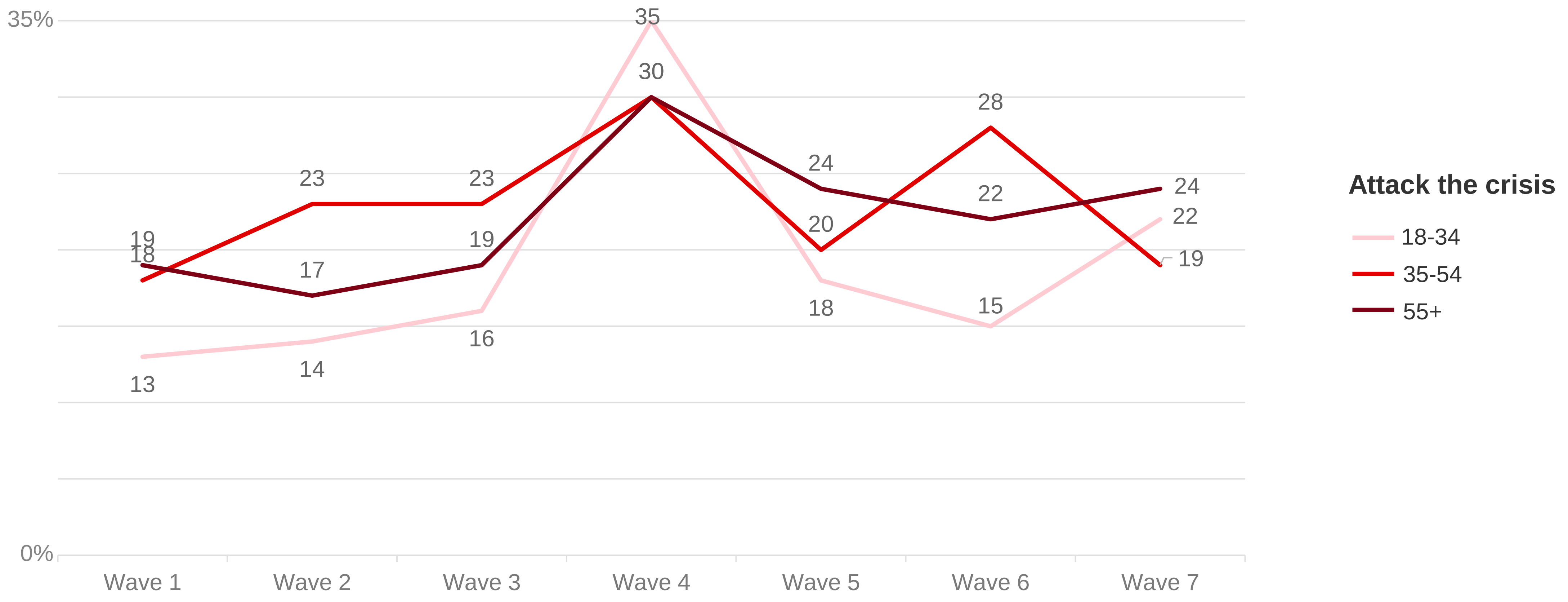
Q3: What is the main thing that brands should do at the moment? What other actions should be taken? Choose one of the following

For 18-34 y/o and 55+ y/o Dutch, it is most important for brands to show that they attack the crisis and demonstrate that it can be fought



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

Also mind that different attitudes towards COVID-19 mean that the Tribes expect different things from brands. Note that for the two largest groups in the Netherlands (Que Seras and Hibernators), it is not about attacking the crisis, but about being an example and guiding the change in a practical and realistic way

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)
Attack the crisis and demonstrate that it can be fought	Be an example and guide the change	Be practical and realistic and help consumers in their everyday life	Attack the crisis and demonstrate that it can be fought	Attack the crisis and demonstrate that it can be fought	Group too small in NL

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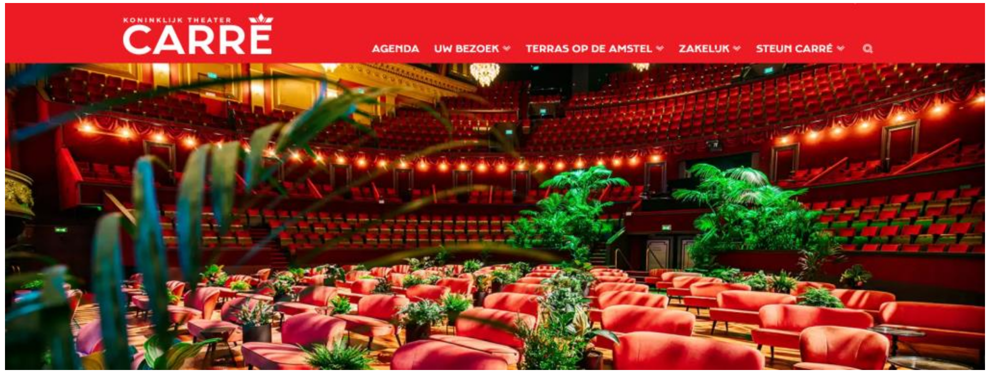
Q3: What is the main thing that brands should do at the moment? What other actions should be taken? Choose one of the following

Two excellent Dutch examples of brands being an example and guiding the change in a practical way, are Carré and Mediamatic. They both make it easy for consumers to follow the rules, maybe even let them forget about corona for a moment, while not only ‘adjusting’ to the new situation, but really turning it into something better

Amsterdam theatre **Carré** has internalized the ‘new normal’ in a more permanent manner, by redecorating their theatre hall in a way that is in line with the COVID-19 rules, but is so fun you tend to forget why they actually did it.

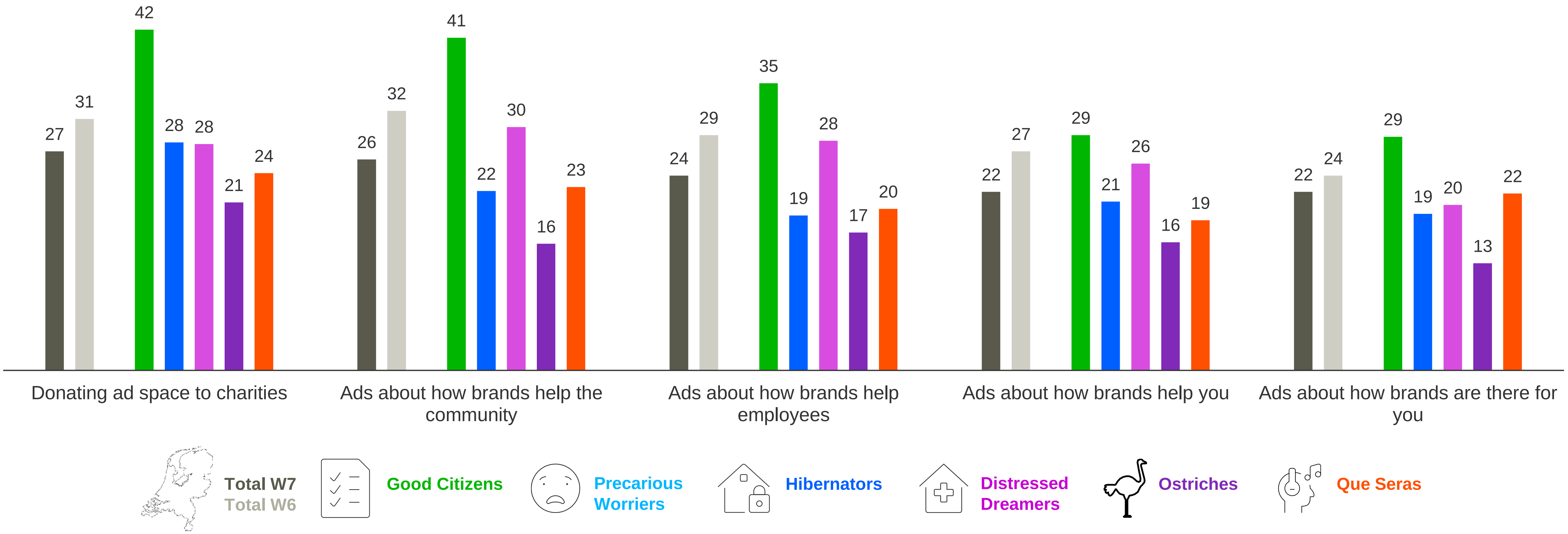


Source: carre.nl

Amsterdam located restaurant **Mediamatic** has created a COVID-19 inspired extension of their regular restaurant. In private little greenhouses you can dine with your intimi in a two or four-person Serre Séparée.

Source: mediamatic.net

In line with a less engaged consumer, the demand for informative ads has slightly gone down. Good Citizens (who like to stay informed) are most open to seeing COVID-19 related ads with regard to how brands can help charities, themselves, and their community.



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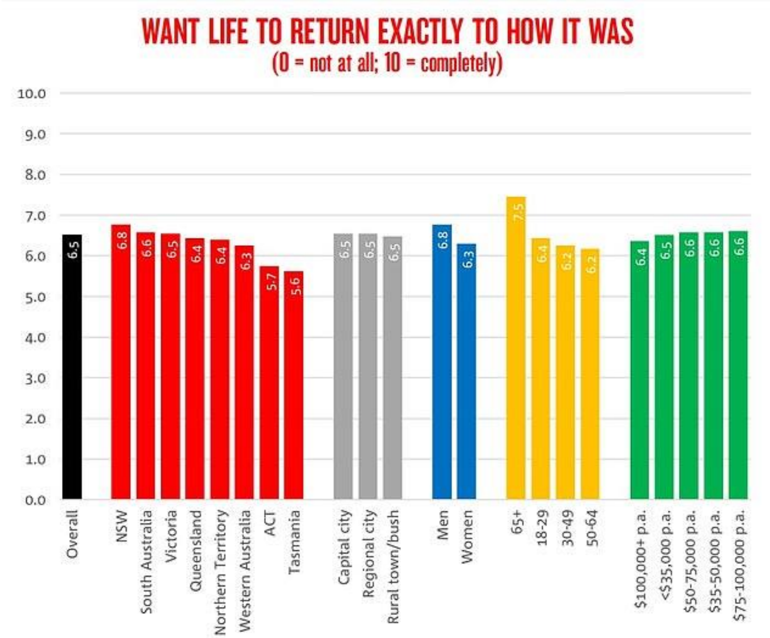
BARO-METER NL COVID-19

Q44. How much of the following would you like to see? % want to see more

What do consumers expect from brands looking beyond COVID-19?

All around the world, people are expressing an appetite for change and see ‘’post’’ COVID-19 as an opportunity

UK, July 2020



Australia, June 2020

Netherlands, July 2020

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They often start with what affects them personally

My World:
Me and my immediate family

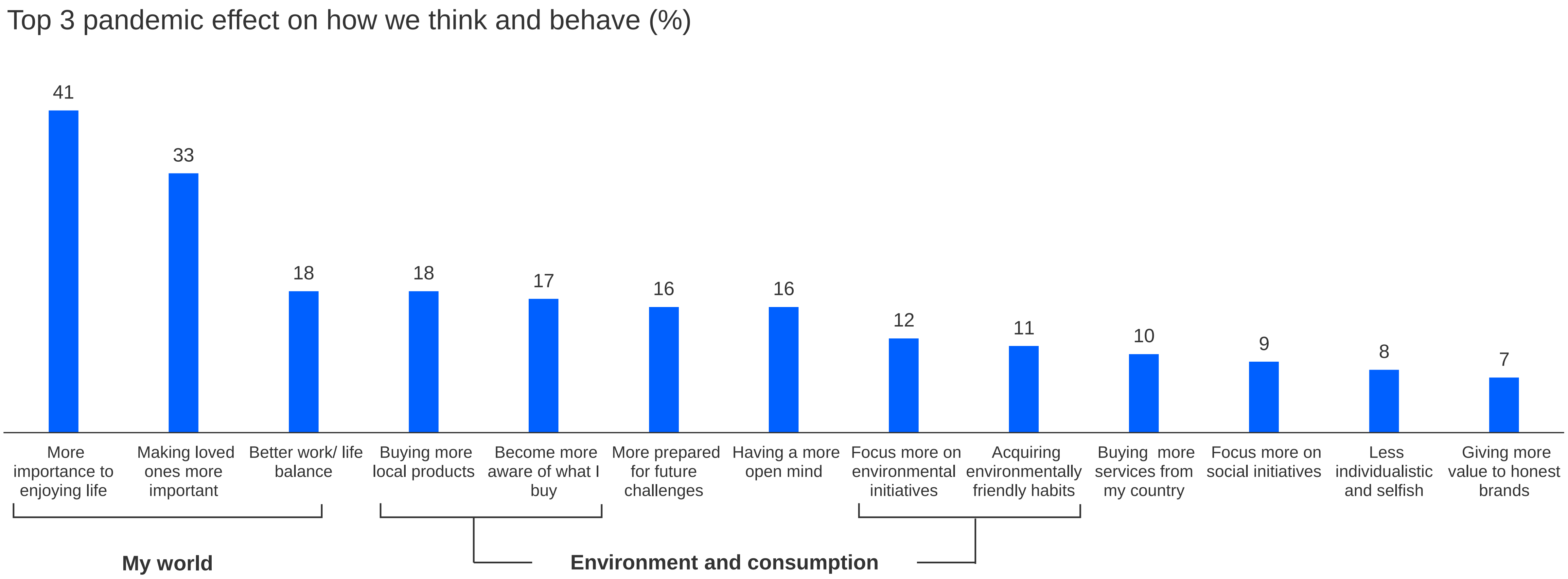
Our World:
Extended family and friends and communities to which I belong

The World:
The planet, the wider world, its issues and communities

Source: Henley Centre (now part of Kantar Consulting)

We see ‘my world’ issues at work in our post COVID-19 resolutions

But environmental issues are unusually prominent

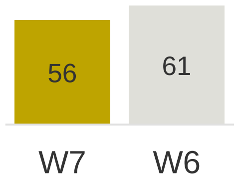


Q84s_05: This pandemic could have an effect on how we think and behave. Which of the below are most relevant to you? ? Select the top three most relevant ones.

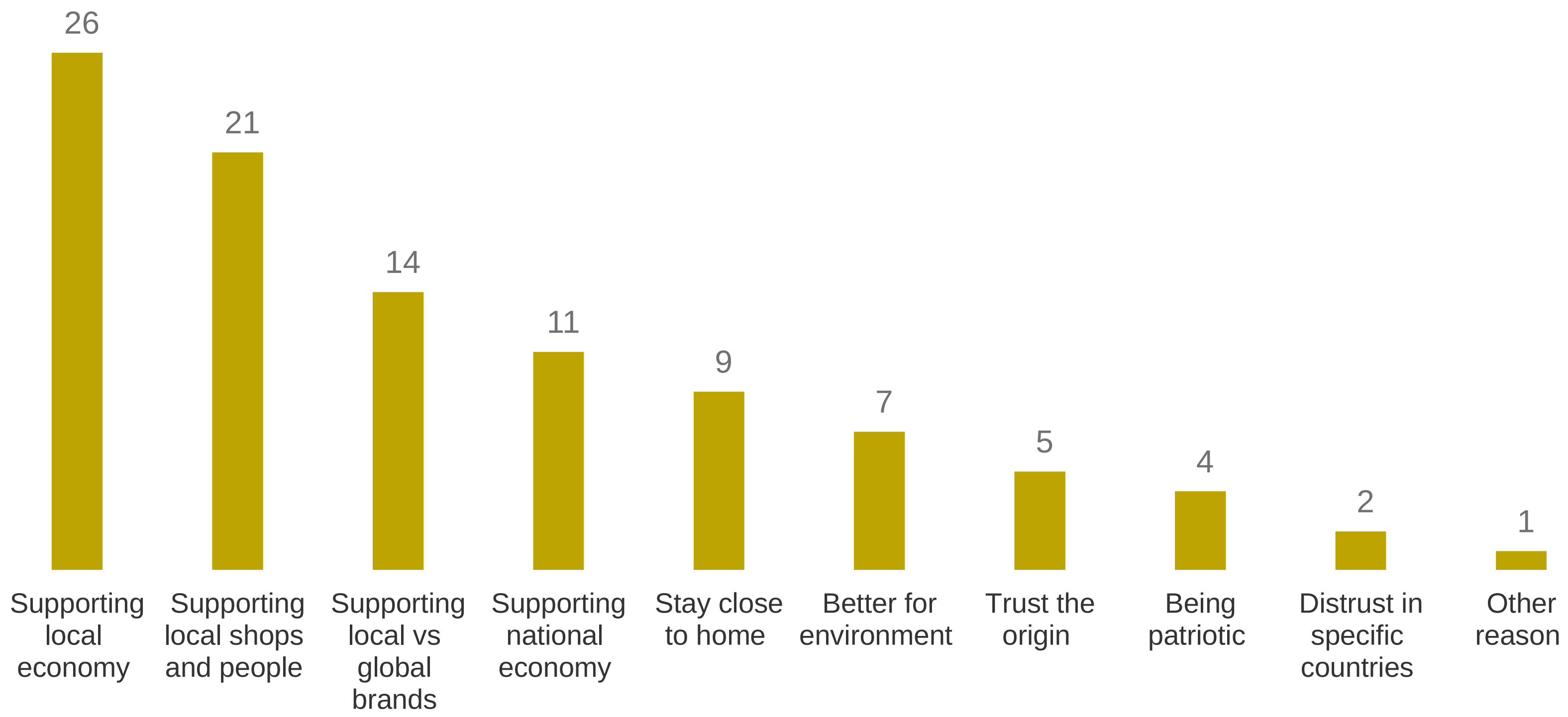
However declining, still more than half of the Dutch find that shopping at local stores is important for the community. Our focus on local has evolved from safety to more overt support for my world and our world

56%

…of consumers think shopping at local stores is important for the community



Main reason to shop at local stores



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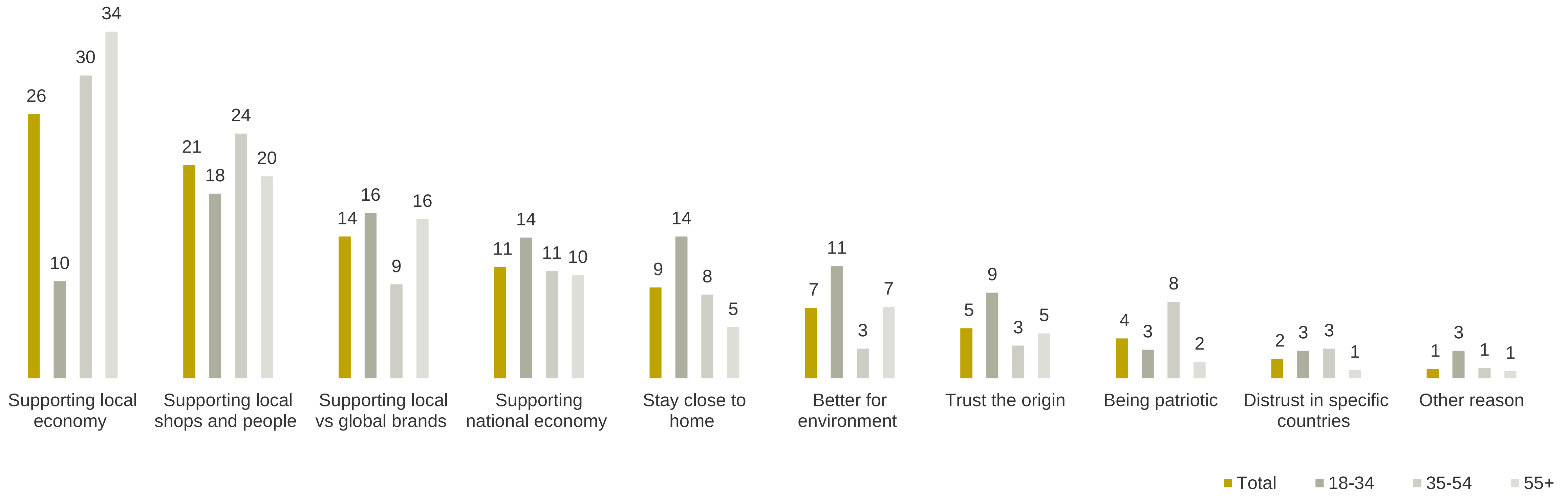
Q45. Shopping at local stores is important for the community (top2) / Q45a: You previously said you believe it is important to shop at local stores for the community. What is the main reason why you believe that's the case? Wave 7

While the main reason for the 35+ y/o to shop local is to support the local economy, 18-34 yo care more about supporting local shops and people

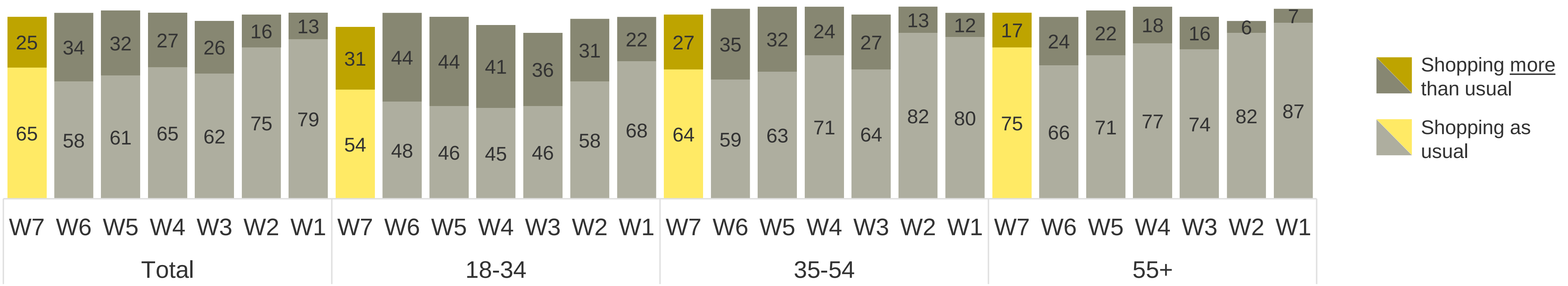
Main reason to shop at local stores



Q45. Shopping at local stores is important for the community (top2) / Q45a: You previously said you believe it is important to shop at local stores for the community. What is the main reason why you believe that's the case? Wave 7

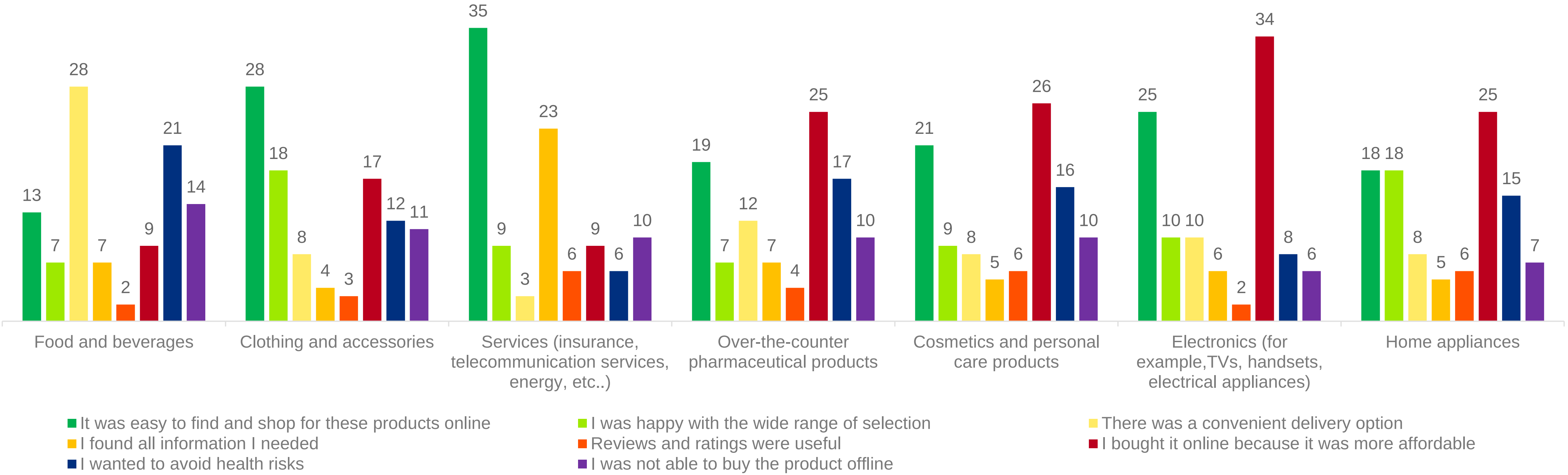
Besides a stronger focus on local shopping, *online* shopping has also seen a strong increase during the COVID-19 crisis. The initial increase in online shopping was at least partly due to the closing of many physical stores, but now that most physical stores have reopened, still a quarter of Dutch shoppers continues to shop online more compared to a month ago. Do consumers still feel unsafe to shop offline?

Shopping at online e-commerce websites

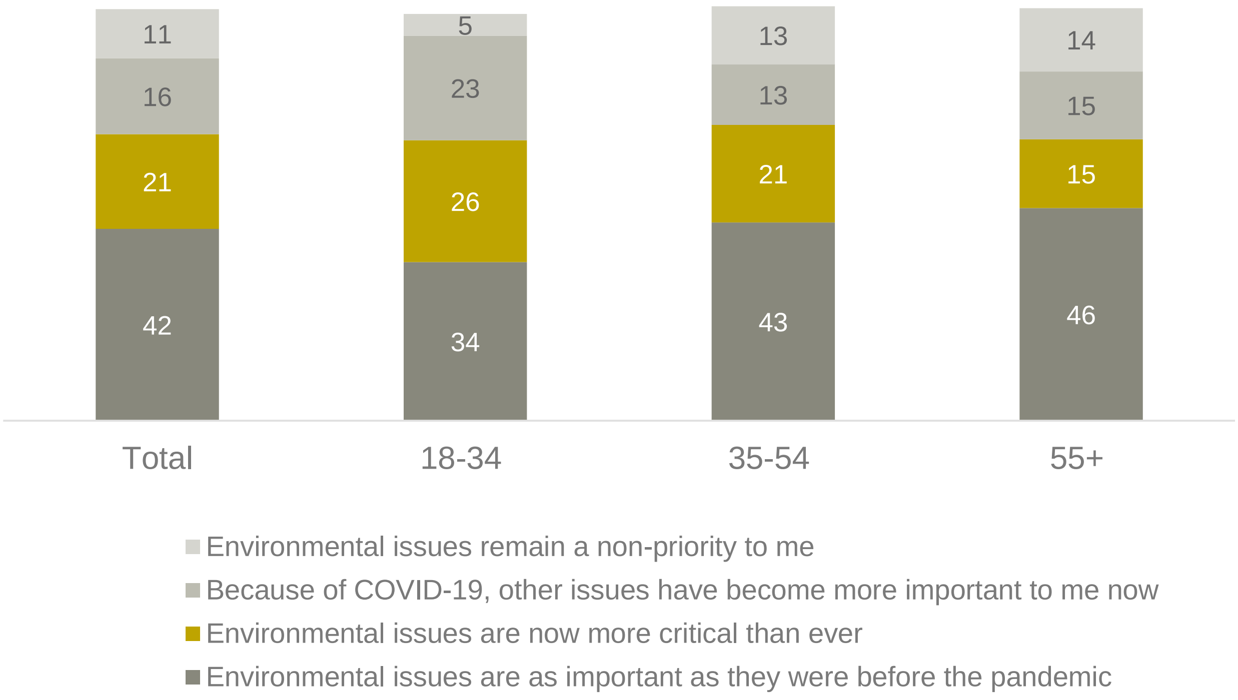


Q4: Overall, how has the coronavirus situation impacted your shopping across channels, in comparison to last month? Physical vs Online outlets; increase vs stayed the same

Health risk avoidance is not the main reason for the online buying of any product category. Consumers find it easy to find and shop products online and like the often more affordable prices. Now that consumers have discovered the benefits of online shopping, some might not go back to offline



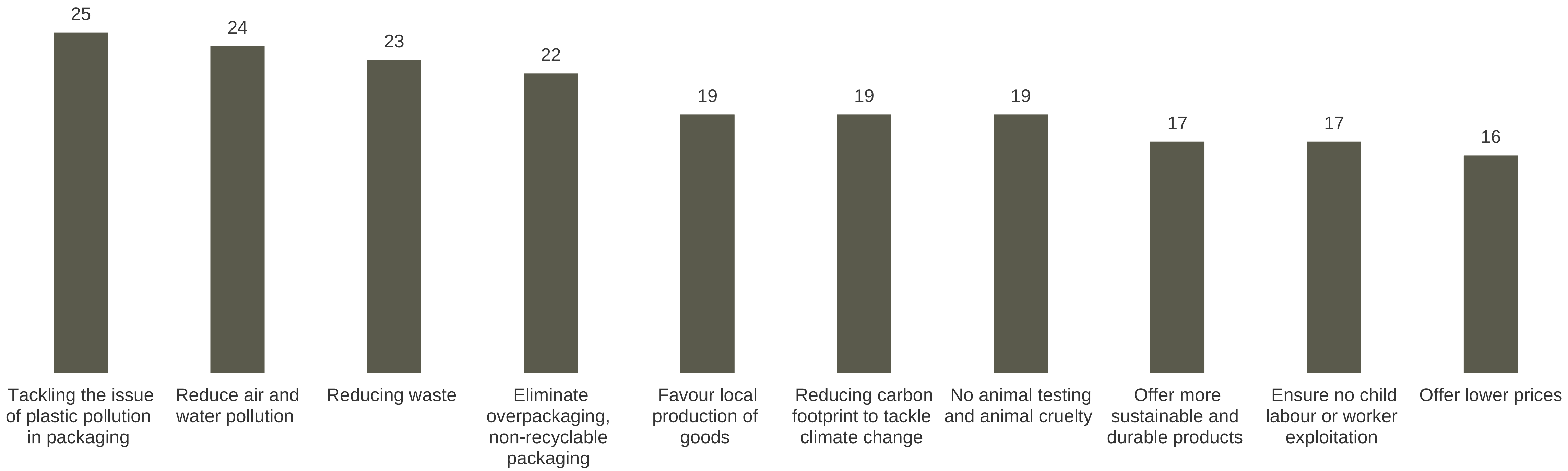
Looking at the world beyond COVID-19, Dutch consumers find consumption behaviour and environment related issues more and more relevant for the future: 1 in 5 consumers finds environmental issues more critical than ever



KANTAR BARO-METER NL COVID-19

Q84s_05: This pandemic could have an effect on how we think and behave. Which of the below are most relevant to you?
Q85: Before the global pandemic, environmental concerns were a key topic for governments, companies, brands and people. Has your opinion towards worrying about environmental issues changed because of COVID-19?

In this light, the overall issues that companies/brands should tackle (besides dealing with COVID-19) is reducing packaging pollution, air/water pollution and waste

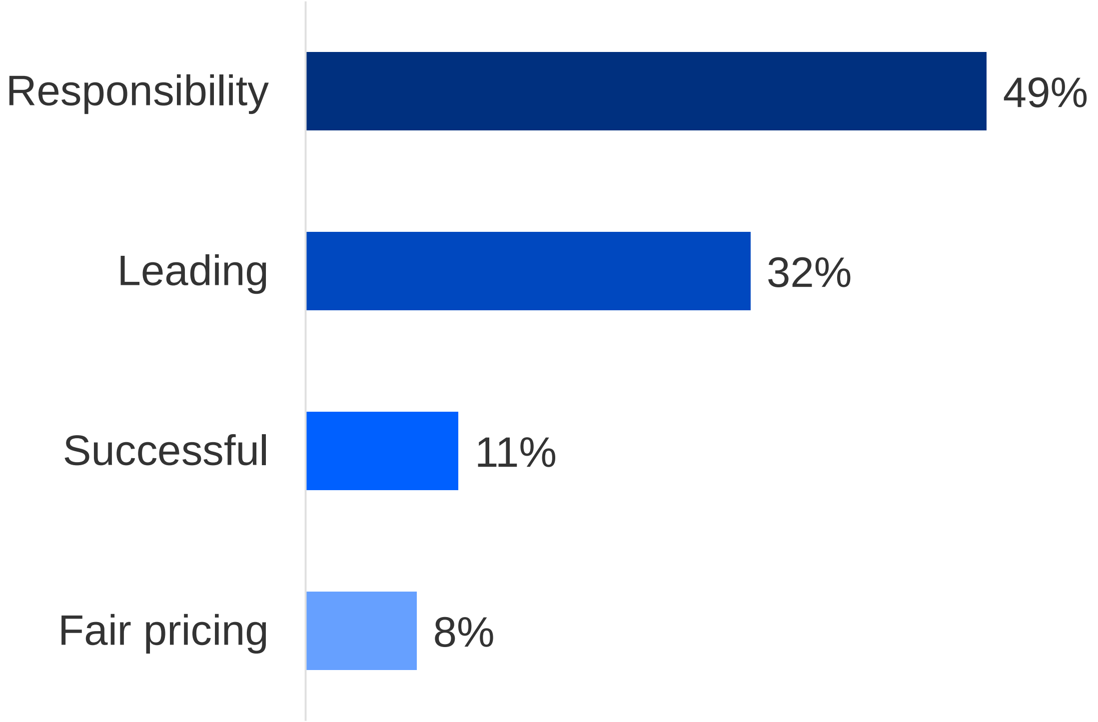


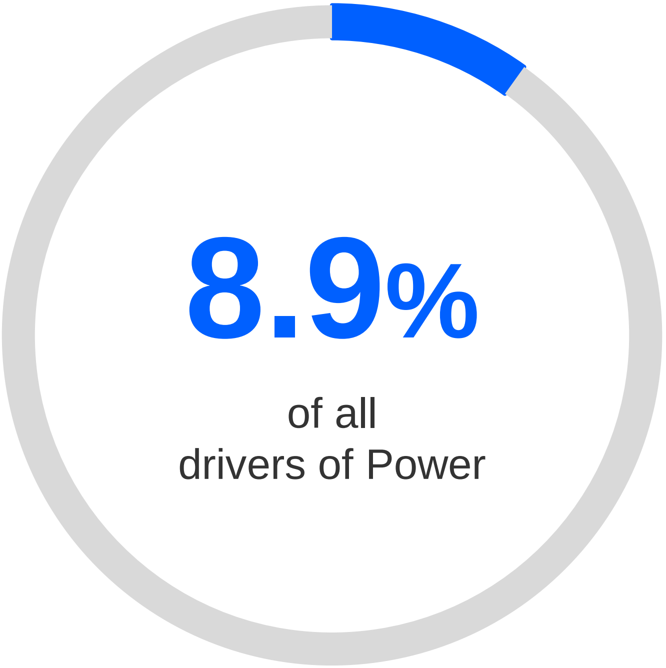
KANTAR BARO-METER NL COVID-19

Q86: What are key issues you think companies and brands should worry about now, besides dealing with COVID-19?
1st, 2nd and 3rd most important issue netted

Consumers expect responsible behaviour from brands/companies, both in terms of COVID-19 and wider world issues – responsibility and leadership are also drivers of Corporate Reputation, which in turn drives brand equity

Contribution to overall corporate reputation





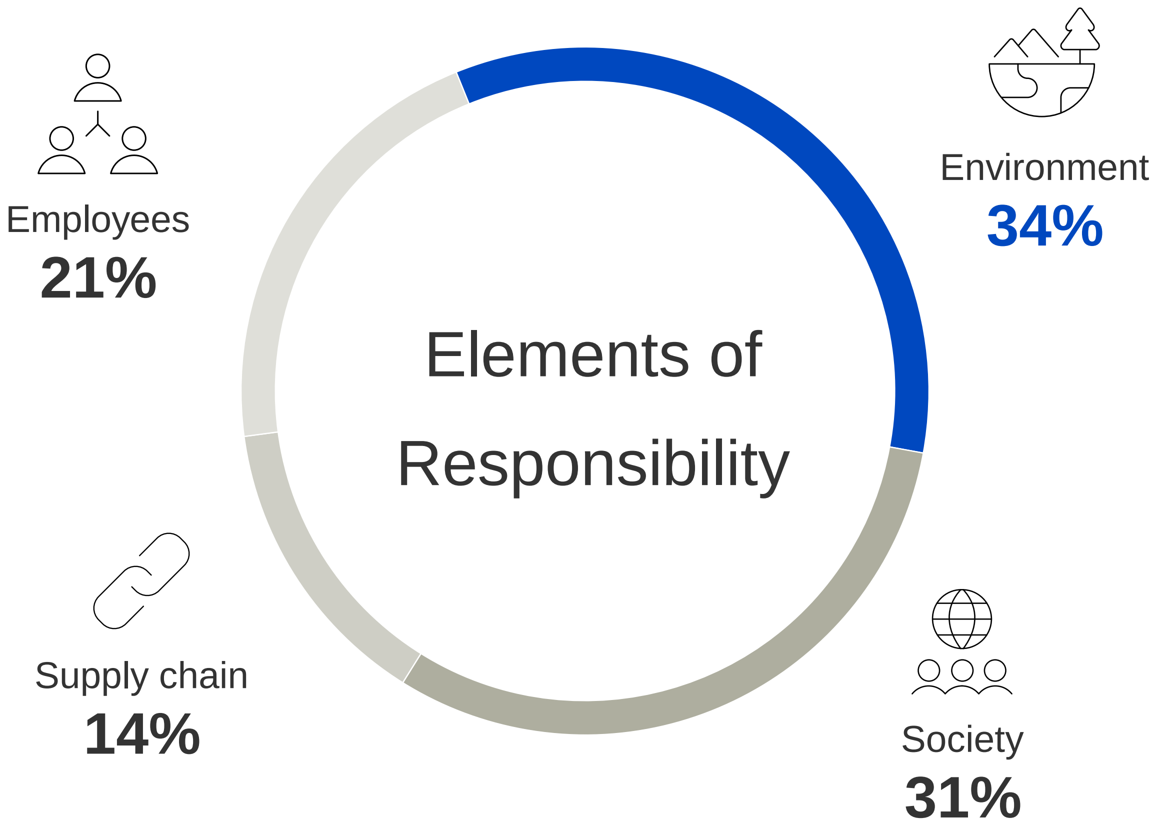
Total effect of <u>Corporate Reputation</u> elements on brand equity

Source: BrandZ database / BrandZ brand structures analysis of > 5,000 brands

Responsibility is now 3x more important to Corporate Reputation than 10 years ago

Responsibility accounts for **49%** of reputation

Environmental responsibility or **Sustainability** is now the most important element of Corporate Reputation



Source: BrandZ 2020

And responsibility has been core to many Top 100 brands in BrandZ 2020

Toyota

Environmental Responsibility

Nike

Social Responsibility

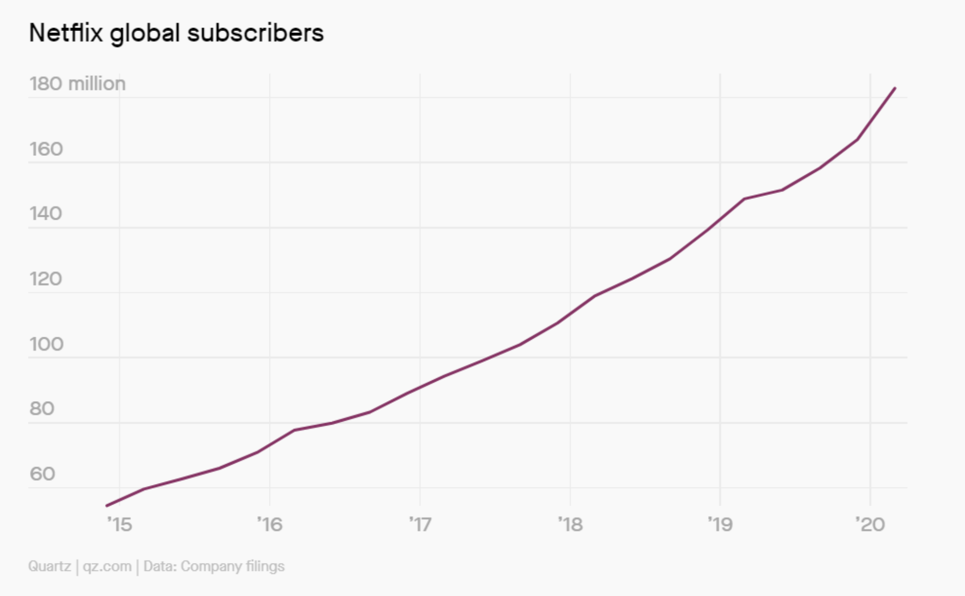
DHL

Employee Responsibility

3
Impact of COVID-19 on Customer Experience of internet based video and sound entertainment subscription services

Being housebound during COVID-19 caused an increase in the usage of video streaming services

The crisis did not lead to an additional increase in subscribers of Netflix…



But mainly to an the increase in usage itself. Not surprisingly, people just spent more time watching Netflix

Netflix Traffic Hits All-Time Highs Amid Coronavirus Pandemic, Says AT&T

Source: Forbes

London (CNN Business) – Netflix and YouTube will reduce streaming quality in Europe for at least the next month to prevent the internet collapsing under the strain of unprecedented usage due to the coronavirus pandemic.

Whether it is due to the COVID-19 crisis alone or not: Kantar's newly released Global BrandZ 2020 results show that Netflix is amongst the fastest rising brands of 2020

MOUTAI
58%

47%

40%

COSTCO WHOLESALE
35%

NETFLIX
34%

amazon
32%

in
31%

Microsoft
30%

Adobe
29%

美团网 meituan.com
27%

Top 10 BrandZ 2020 fastest risers

KANTAR

Global Brands 2020

Source: BrandZ 2020

The fast rise of Netflix is at least partly because it was one of the brands that was able to “own the occasion” during COVID-19

‘Athleisure’ apparel ▲ +$5.4B

Identifying a new occasion in the overlap between work, workout and relaxation

Netflix ▲ +34%

Owning the ‘evening in’ occasion – accelerated by Covid-19 lockdowns

Moutai ▲ +58%

Extending its ownership of the baijiu ‘gifting’ occasion: more festivals, consumers, variants

Netflix is also seen as leading the way…

Brand attribute:

Brand	Leading the way	% Brand value change
Netflix	141	+34%
Meituan	135	+27%
Tesla	127	+22%

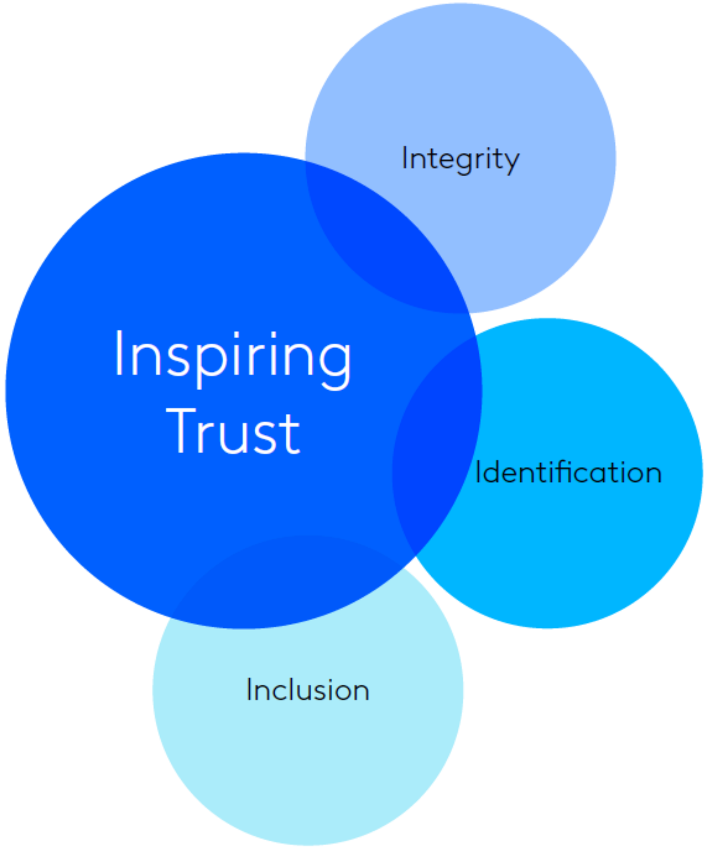
Highly **disruptive** brands grew on average

+7%

compared to others

Source: BrandZ 2020

… And as trustworthy, despite using a lot of customer data. Our model of trust for 'new' brands demonstrates how some have managed to grow so fast

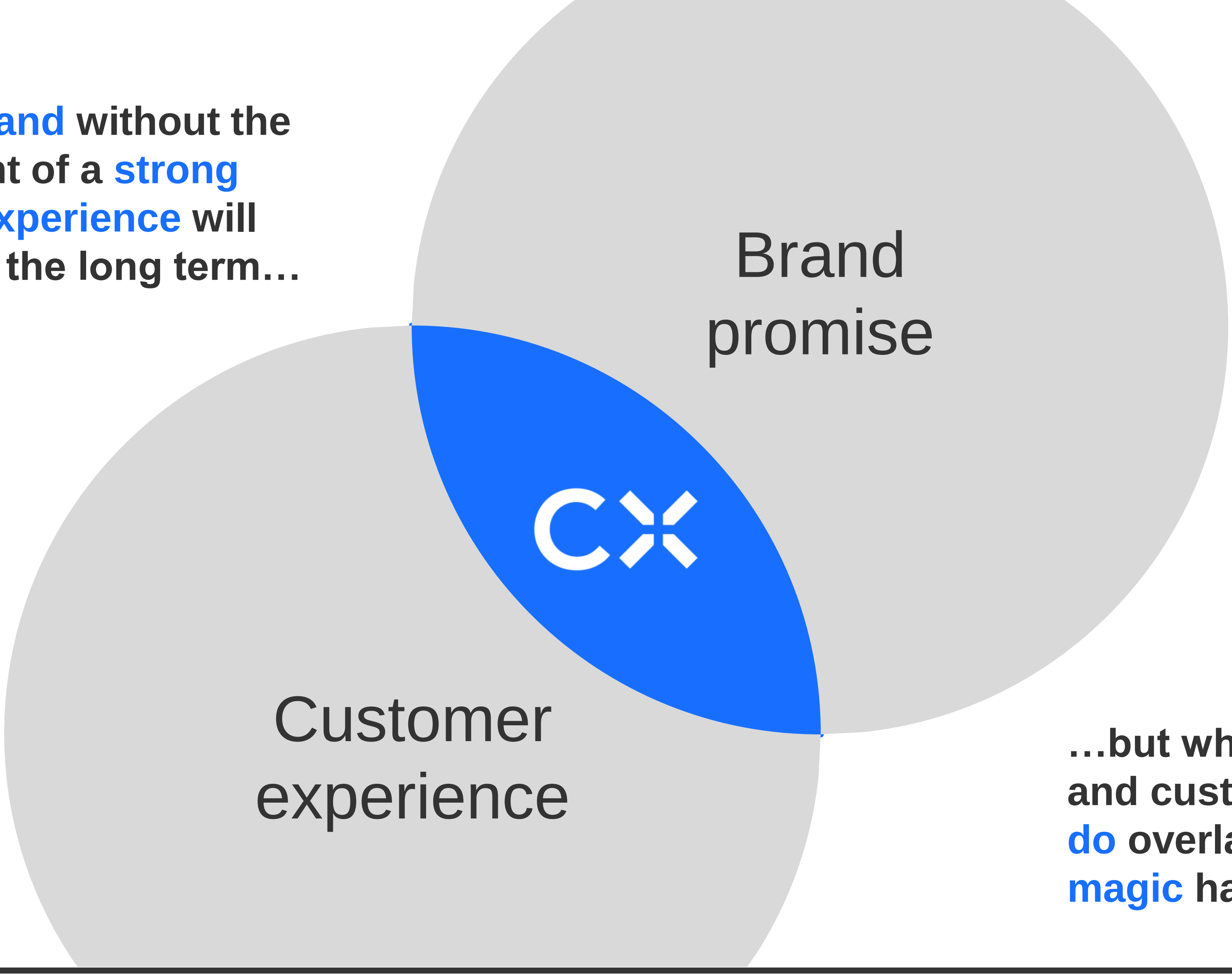


Despite all using customer data, **Netflix** has a much stronger association with being open and honest than other 'content' platforms

126	**Netflix**	118	**Google**
110	**YouTube**	101	**Facebook**

Source: BrandZ global database – global averaged index scores
*Douyin [China]

A strong brand without the enforcement of a strong customer experience will not grow in the long term…



…but where brand promise and customer experience do overlap, is where the magic happens

Aligning the brand promise with the actual customer experience delivery will give you the experience advantage

CX PERFORMANCE SCORE + **EXPERIENCE GAP** = **CX+ INDEX**

CX Performance score calculated as the mean of five key success factors.

Gap between the brand promise and the actual customer experience delivery. Can be positive or negative.

The experience advantage

Amongst technology and communication services, streaming brands globally perform very well to expectations

Rank	Category	Brand	CX Performance score	Experience gap	CX+ Index
1		**Netflix**	**122**	**+7 ***	**127**
2		Apple	121	+5	126
3		T-Mobile	113	+6 *	118
4		Samsung	109	+7 *	114
5		**Spotify**	**109**	**+5**	**114**
6		Sky	110	+2	112
7		Xiaomi (MI)	107	+5	112
8		**Amazon Prime Video**	**103**	**+5**	**108**
9		Oppo	103	+4	107
10		Huawei	102	+5	107

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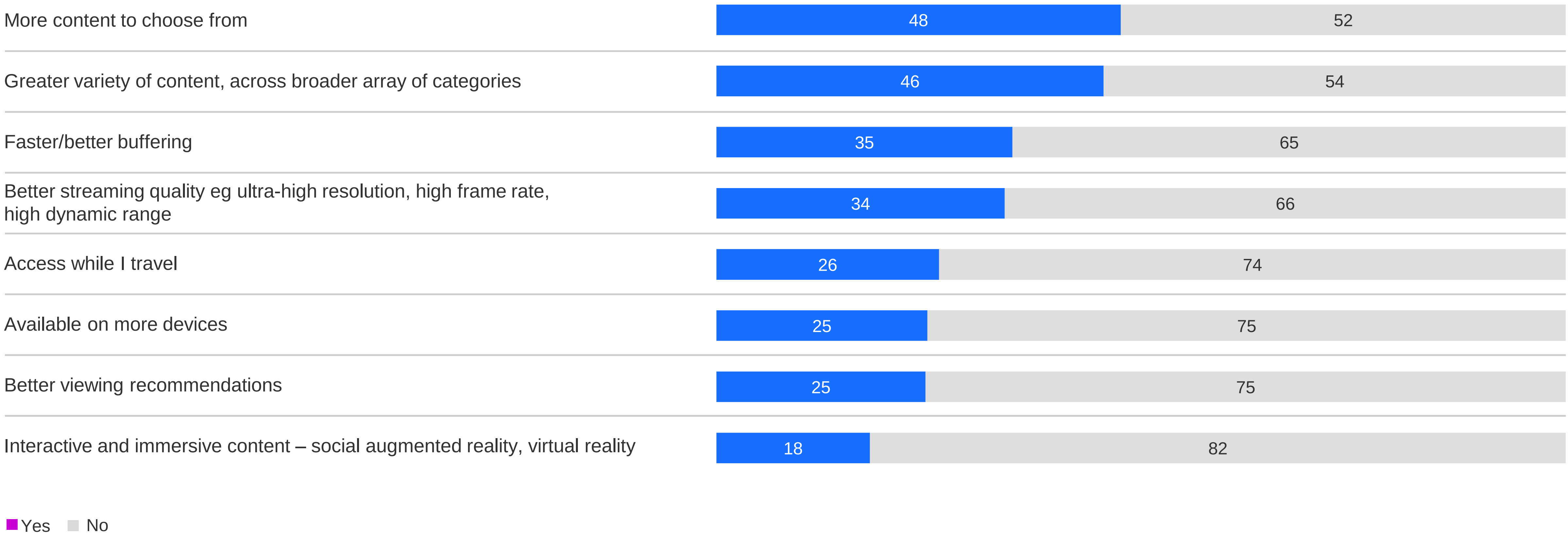
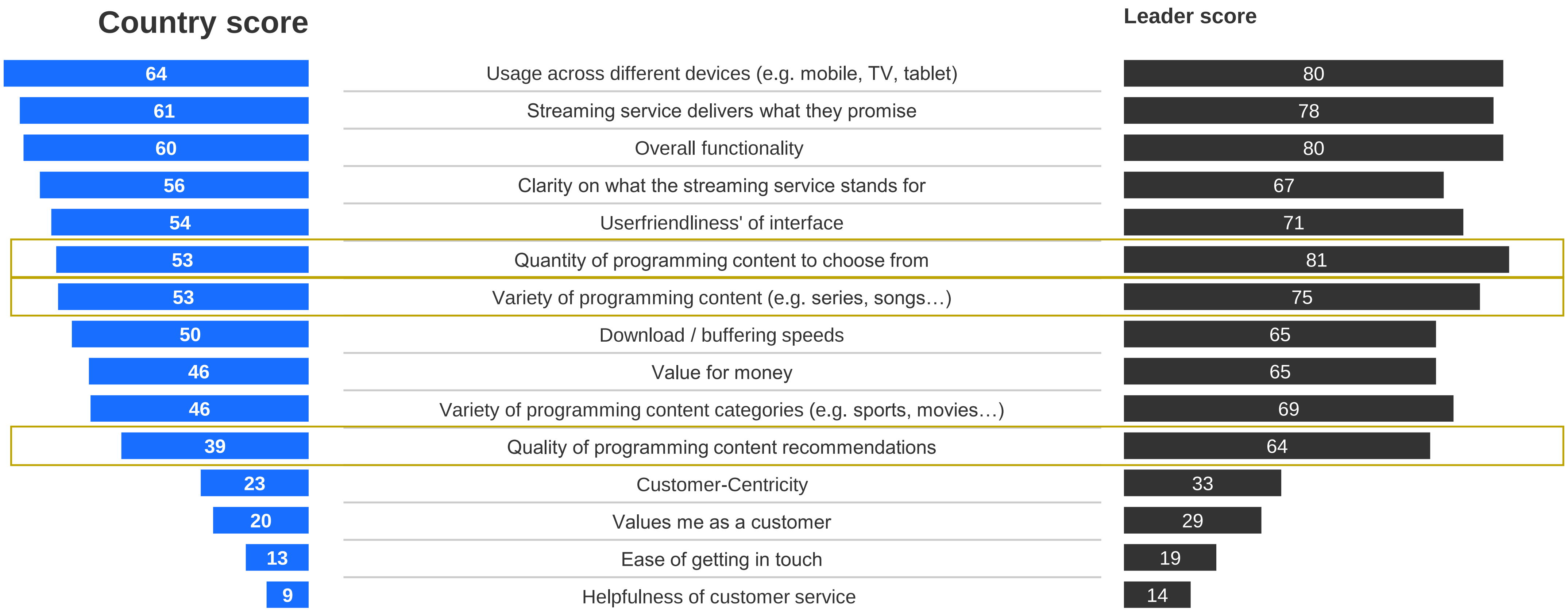
X+ 2020, Global (Ranking including only brands with presence in more than 3 countries for local brand results check country ranking)
*Gap capped at +5. Our analysis demonstrates a +5 gap is the point where the missed opportunity for the Brand to attract new customers (as its marketing under-performing) exceeds the positive effect of delighting current customers through exceeding their expectations.

Consumers say that increasing content quantity and variety would be the main elements for making streaming services even more desirable



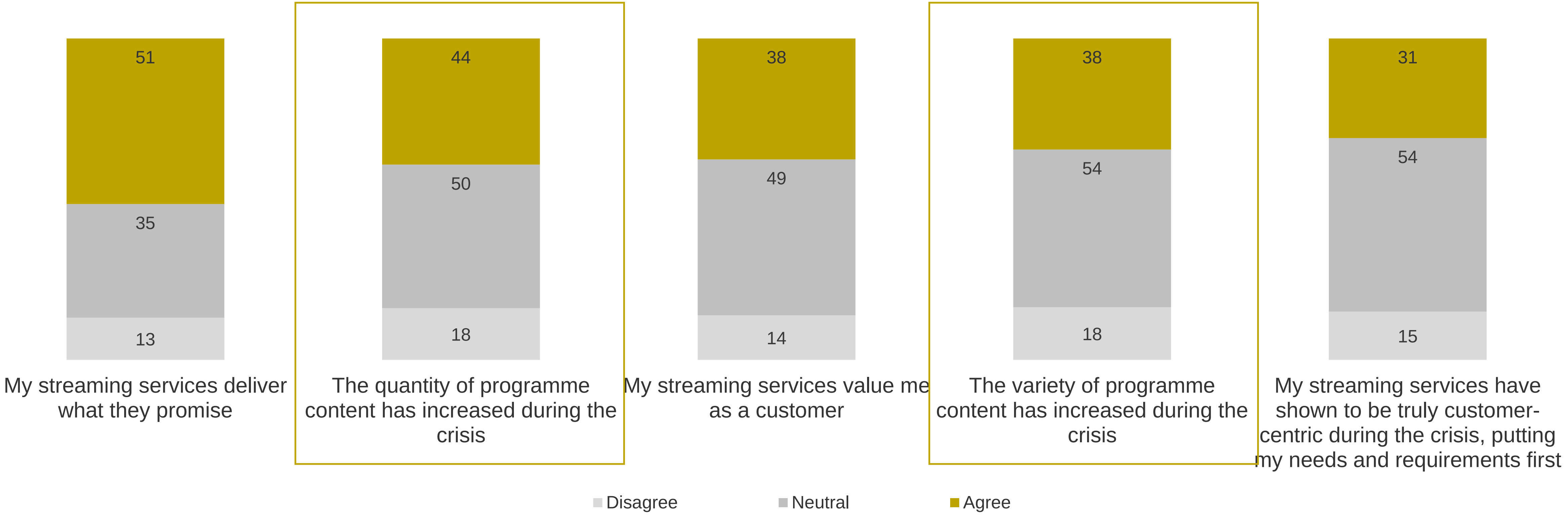
CX+ 2020, Global
What would make streaming content more engaging or desirable?

However in the Netherlands, most streaming services perform relatively low on these particular content aspects



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

Streaming services seem to be very well aware of this. Our COVID-19 barometer data shows that around 40% of the Dutch customers have experienced an increase in program quantity and variety during the crisis



Q79 Thinking about your internet-based video or sound entertainment subscription services (streaming services, i.e. Netflix, Spotify), do you agree or disagree with the following statements?
Based on total n=500 minus n=not applicable

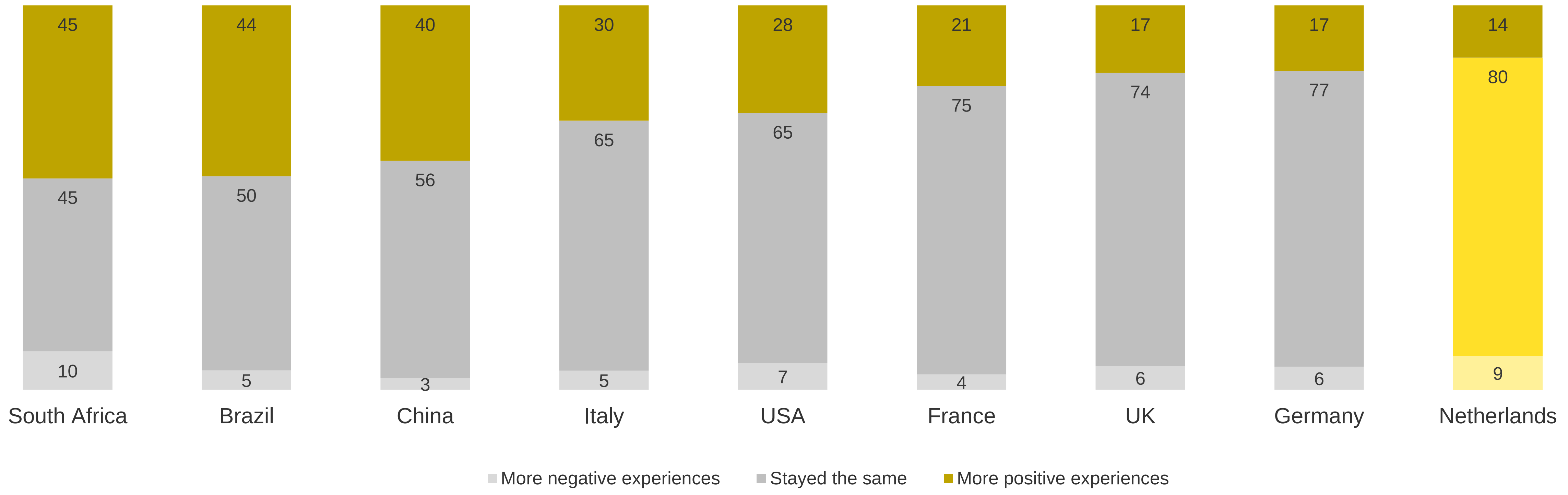
But there is a difference between experience and reality: Netflix's strategy is not to increase the amount of titles, but to invest in content themselves. The experience is even better than the promise

Netflix has over 13,900 titles, but its total library size is getting smaller as it focuses on developing original content

Data from uNoGS indicates that Netflix had at least 13,941 titles across all its international libraries as of April 2020. However, the company's libraries offered around 15,400 titles in January 2018. This large drop in titles reflects the company's continued shift spending most of its content budget on original content.

A perceived increase in the quantity and quality of content may not be enough to create more positive experiences; in the Netherlands it stayed the same for most consumers. There are bigger differences in other markets

"Thinking about your streaming services, how have your experiences as a customer changed during the crisis?



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Q80: Again, thinking about your streaming services, how have your experiences as a customer changed during the crisis?
Results based on all people who use streaming services (NL: n=355)

Finally, we must keep in mind that COVID-19 has influenced video and audio streaming services in a very different way

Many audio streaming services have actually suffered from the crisis, because many consumers use these services during travelling

Spotify: gebruik is weer grotendeels vergelijkbaar met periode voor covid-19

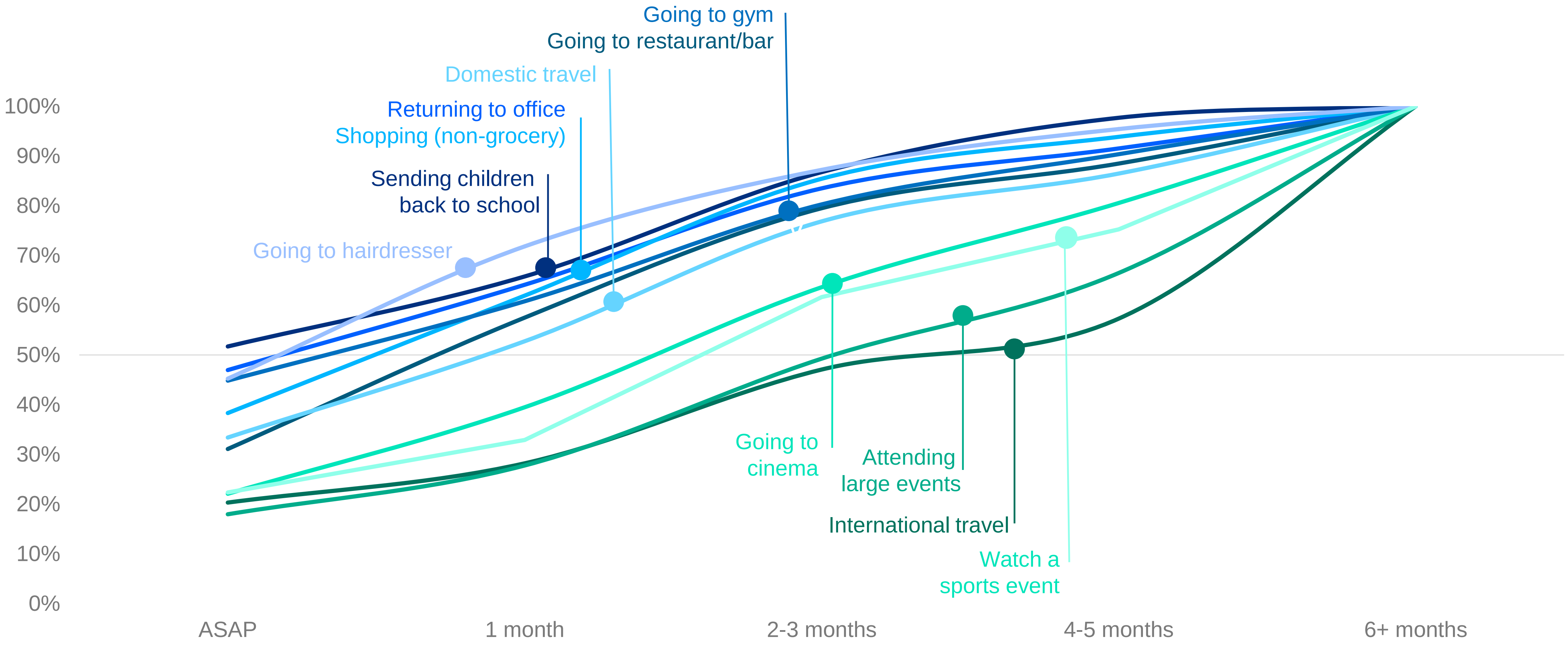
Spotify heeft zijn cijfers van het tweede kwartaal van dit jaar bekendgemaakt. Het bedrijf meldt daarbij dat de wereldwijde consumptie-uren weer naar het niveau van de periode voorafgaand aan de covid-19-pandemie zijn geklommen. Ook de luistergewoonten beginnen weer te normaliseren.

Source:Tweakers.net

4
Returning to our pre-COVID-19 lives

When do we feel ready to return to our pre-COVID-19 lives?

Almost half of consumers who go to an office, are comfortable with returning to the office as soon as possible. Also, almost half is comfortable to travel abroad within 2-3 months



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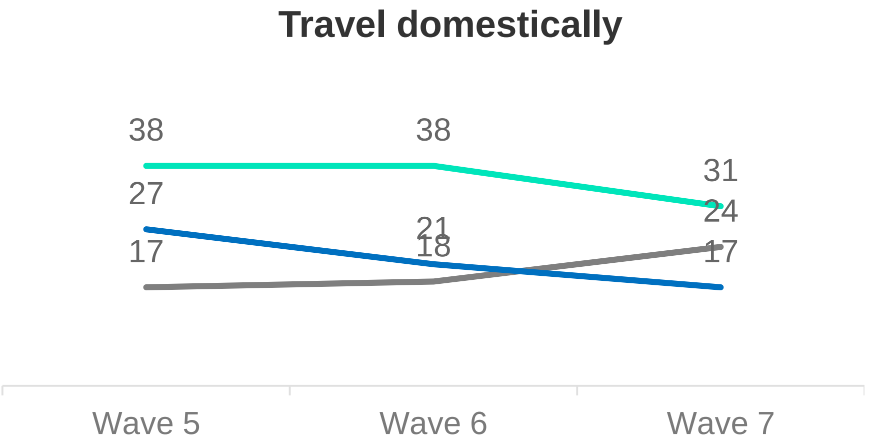
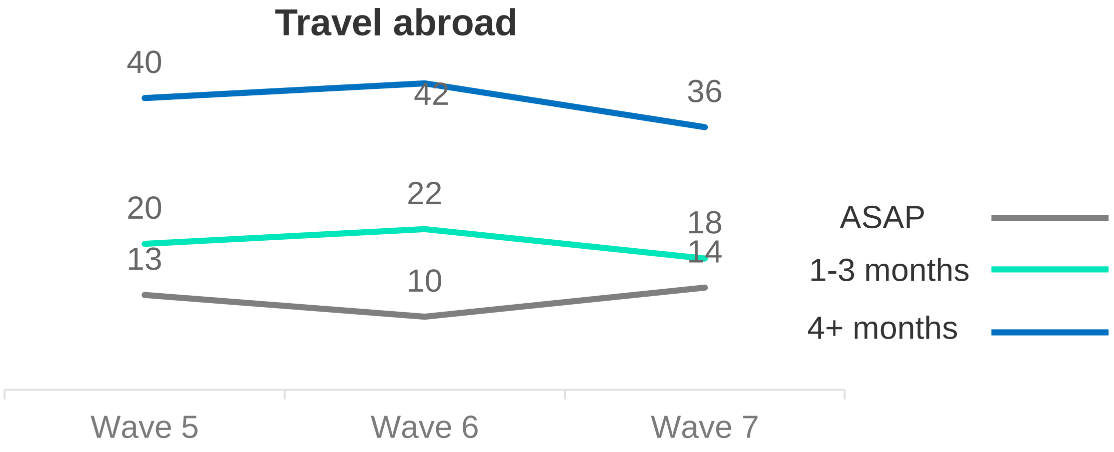
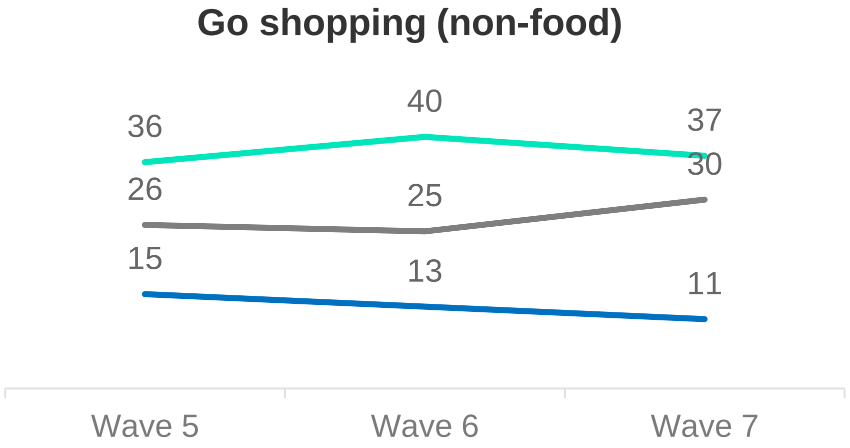
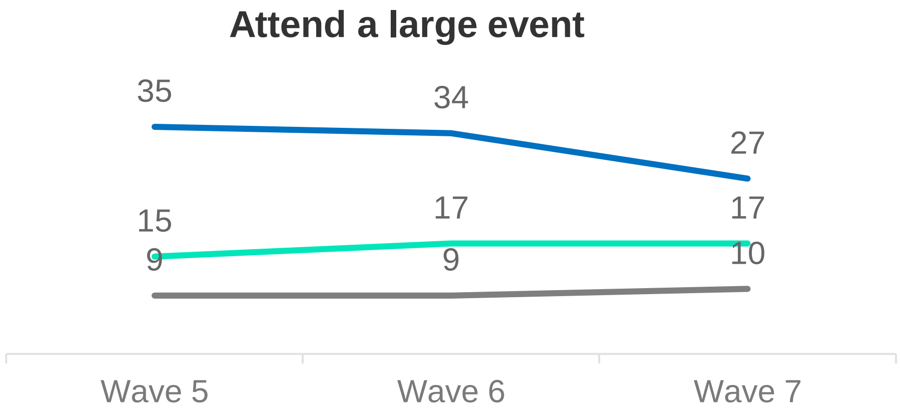
Source: Kantar's COVID-19 Barometer wave 7. If restrictions were lifted, when would you feel comfortable…
Response shown cumulatively, excluding NA/DK

Wave 7 has seen an increase in those ready to travel as soon as possible, both domestically and abroad. Do note that the majority still prefers to wait 1-3 and 4+ months respectively. Also, a growing percentage is ready to go shopping as soon as possible







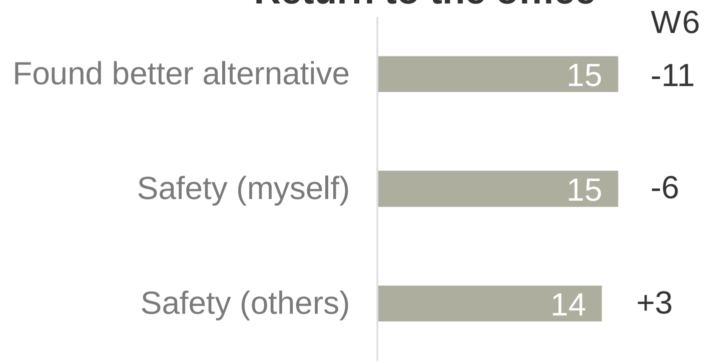


Q53: Assuming there were no longer any government restrictions, when would you feel comfortable doing the following?
Note: does not include not applicable and I don't know

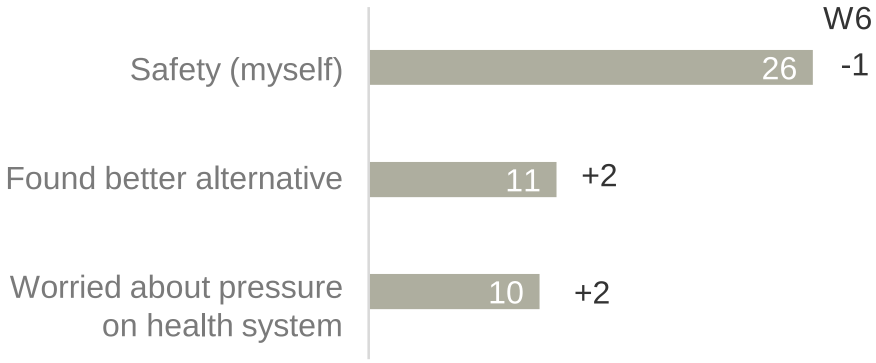
While alternative solutions and safety remain a main reason for not returning to the office, safety of others and a sentiment of irresponsibility are growing from wave 6

Top 3 reasons for waiting to do the following…

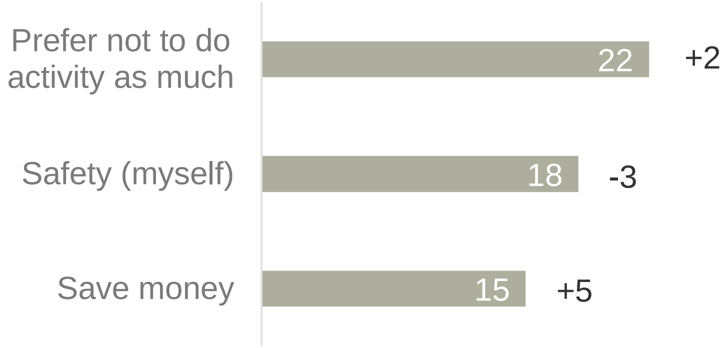
Return to the office



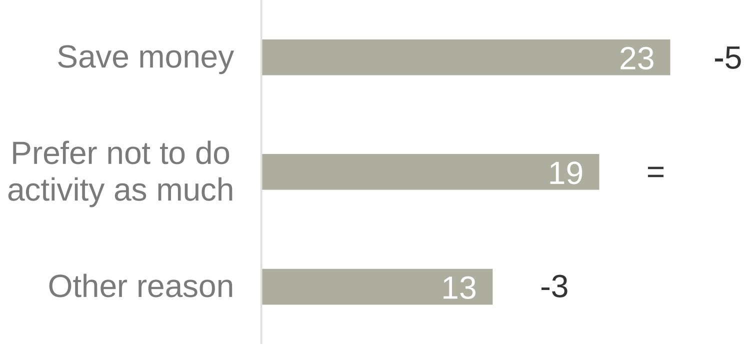
Go to the gym



Go to restaurant/bar



Go shopping (non-food)

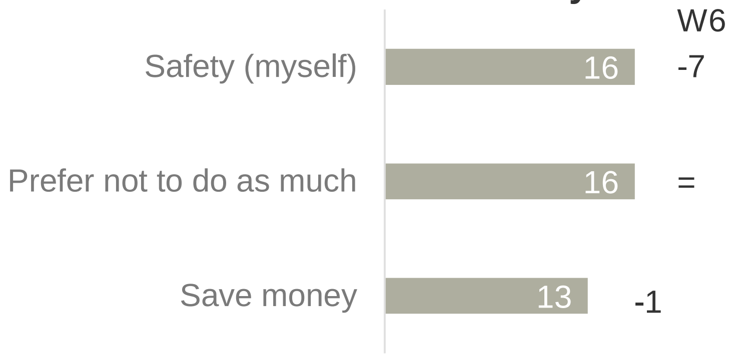


Q62_01: You said you would be looking to wait for a period of time before you were comfortable doing the following. Why?

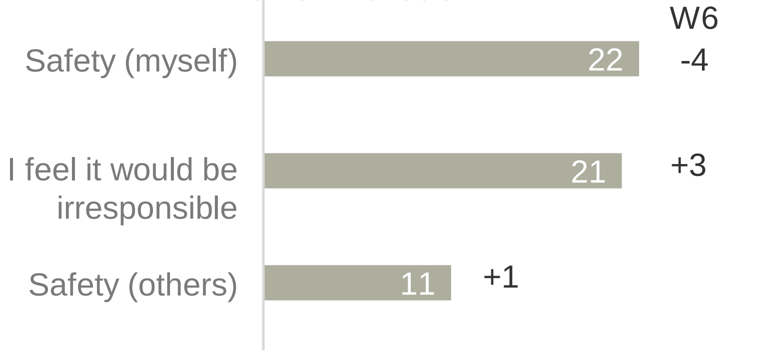
Personal safety remains a main reason for waiting to travel and go to events, but this has declined from wave 6 as cases and restrictions have declined

Top 3 reasons for waiting to do the following…

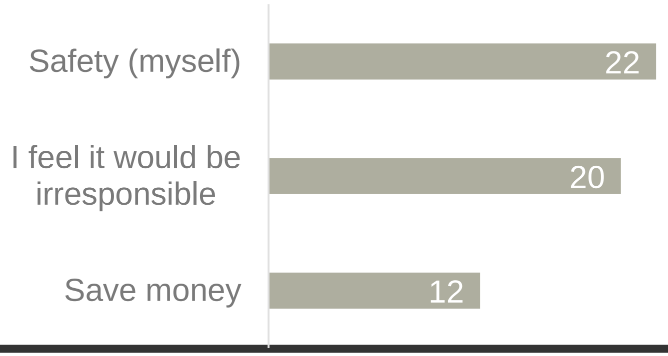
Travel Domestically



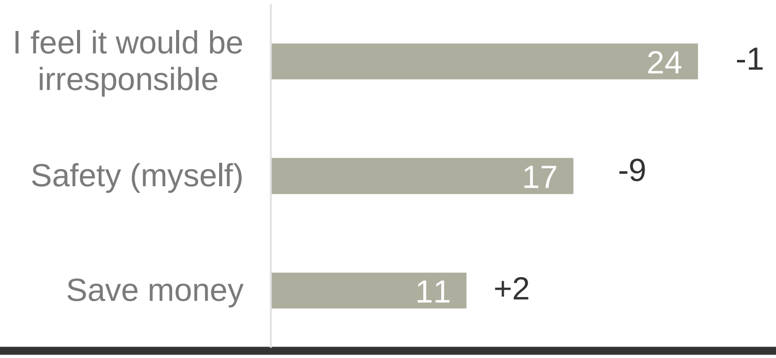
Travel Abroad



Go watch a sporting event



Attend a large event



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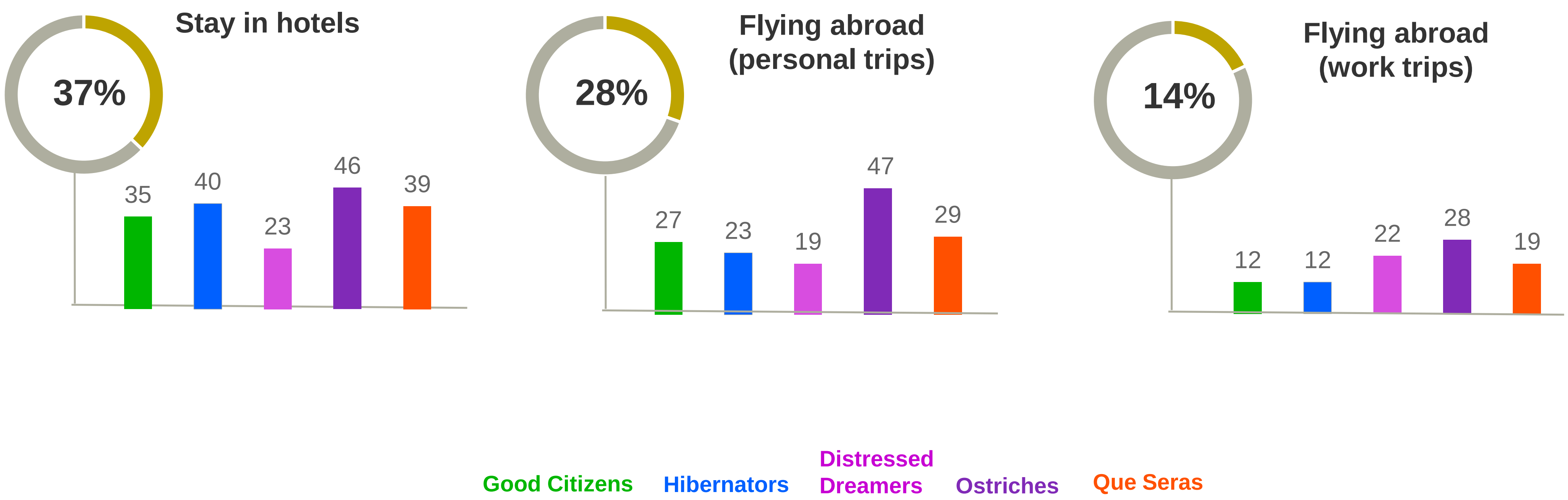
Q62_01: You said you would be looking to wait for a period of time before you were comfortable doing the following. Why?
Data for watching a sporting event NA in wave 6

As lockdown eases, it seems that Ostriches are to a larger extent planning for/going on holidays abroad (almost half is likely to return to staying in hotels and flying abroad for personal trips), while the majority of the rest is planning for a staycation or holiday in the Netherlands

As the lockdown eases, which of these will you most likely return to?

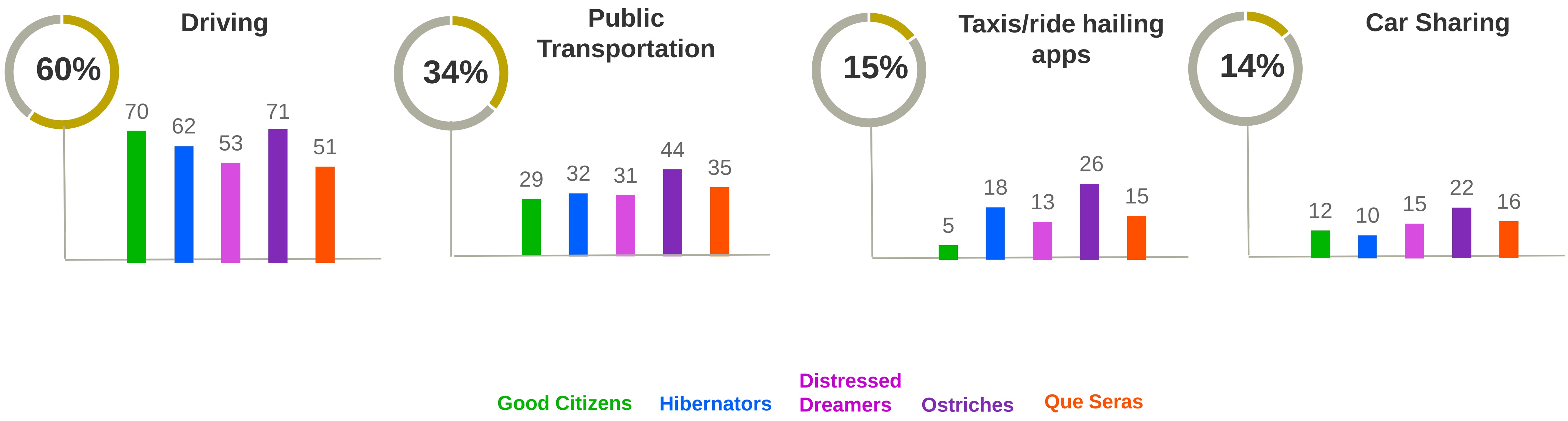


Q52_GRID: As the lockdown eases, which of these will you most likely return to?
Public transport, driving, etc., Top2

Due to COVID-19, many public transportation subscriptions have been canceled or paused and many do not feel comfortable to go back to travelling with public transportation yet. To reduce risk we feel more comfortable driving

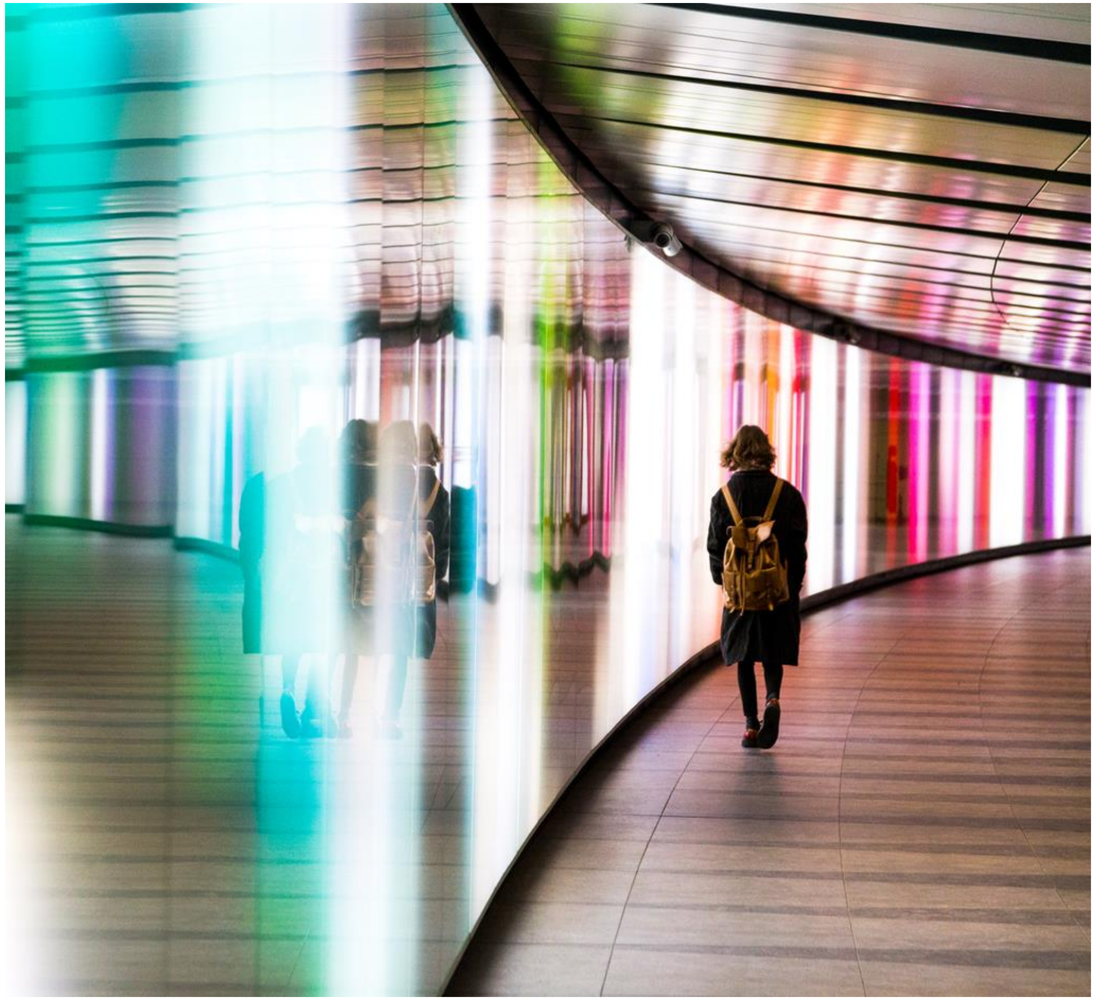
According to the NS, approximately 375,000 train travelers used the corona scheme to adjust or temporarily stop their train subscription between March and July. – Metronieuws.nl

As the lockdown eases, which of these will you most likely return to?



Q52_GRID: As the lockdown eases, which of these will you most likely return to?
Public transport, driving, etc., Top2
Metronieuws SOURCE

For wave 7, Kantar interviewed 500 people aged 18+ in the Netherlands between July 17th and 21st. 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*