



Eden McCallum Netherlands Consumer Survey

Consumer impact of Covid-19 pandemic



In partnership with

eden
mccallum



Contents

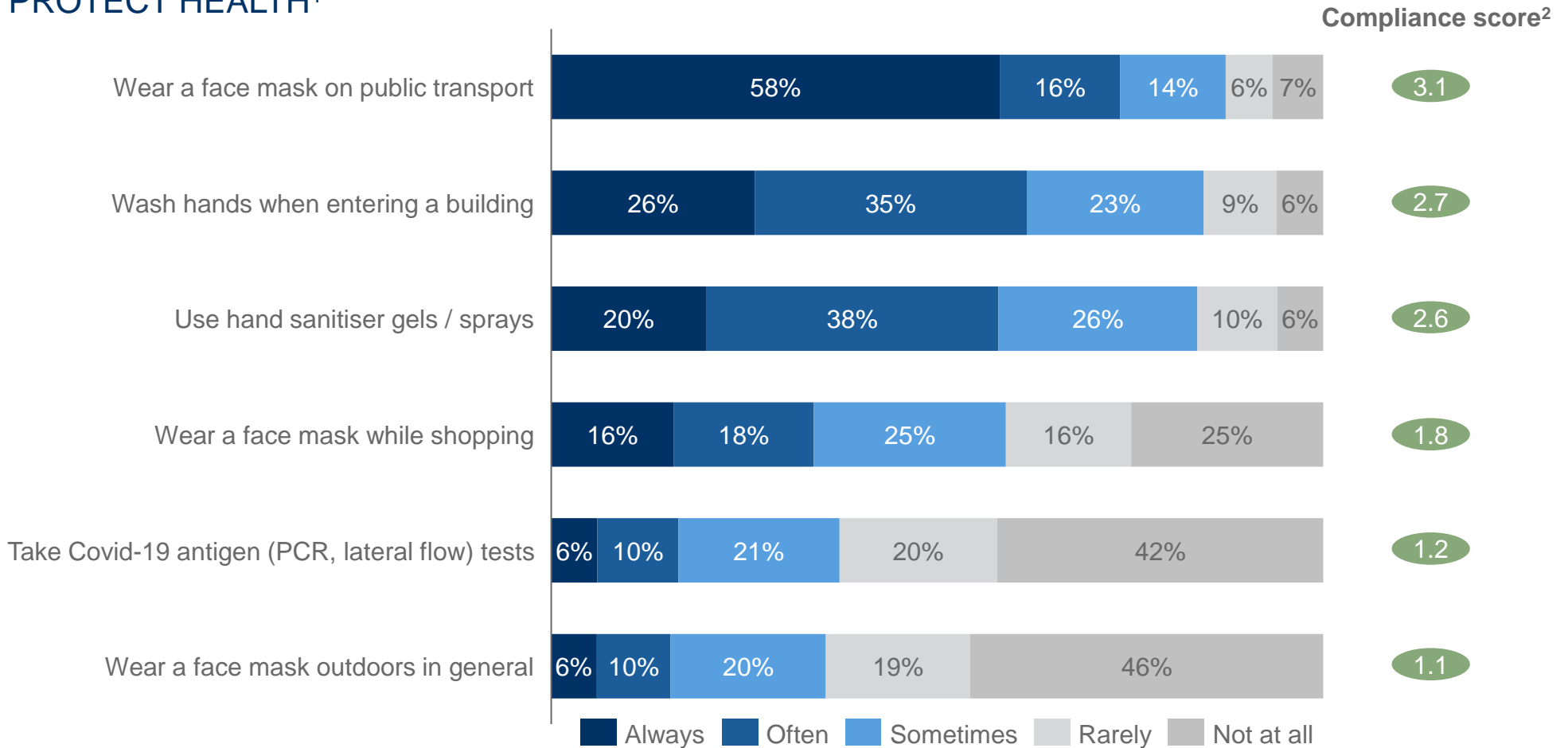


Key findings

Sample demographics

Wearing a face mask on public transport is the most frequent precaution taken against Covid-19, but application of other measures is more sporadic

IMPACT OF THE COVID-19 PANDEMIC ON NL CONSUMER BEHAVIOUR: ACTIONS TAKEN TO PROTECT HEALTH¹



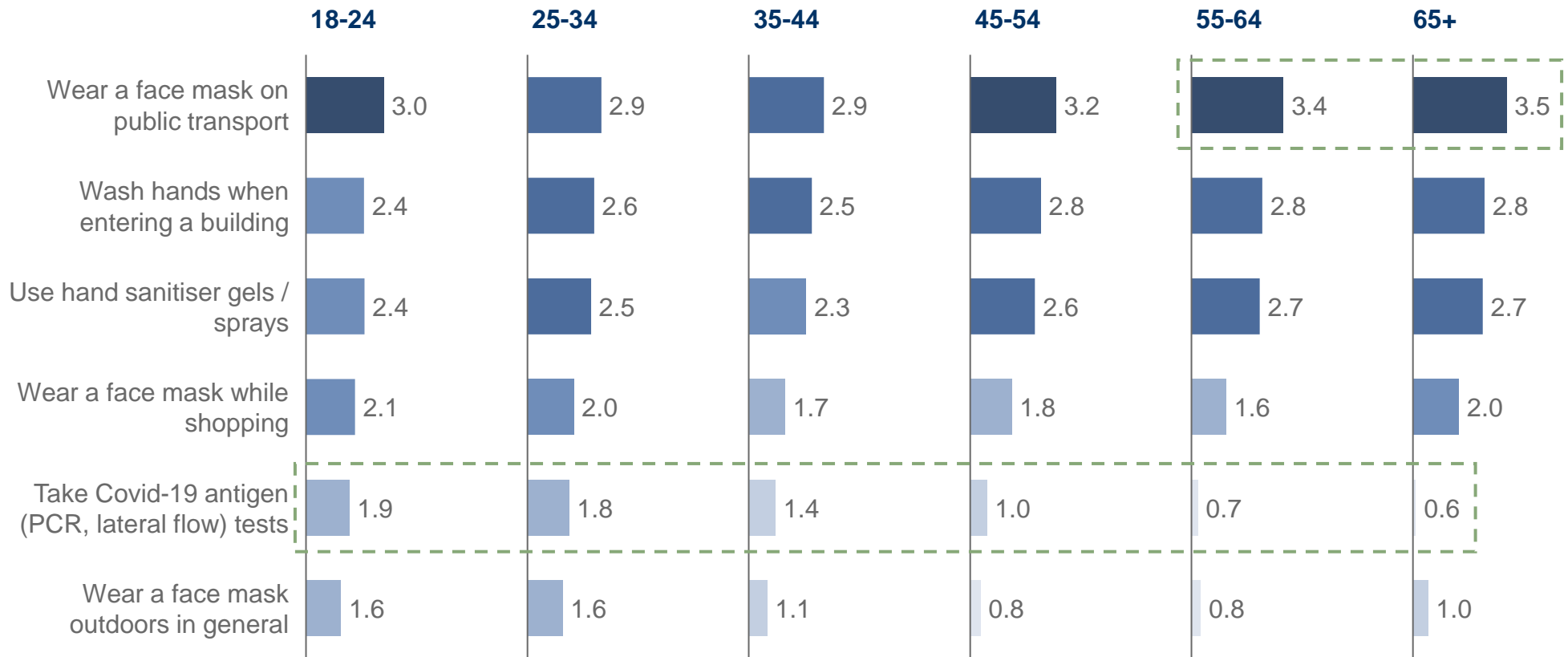
Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Compliance score calculated by assigning a numerical value to each answer code where 'Not at all' = 0, 'Rarely' = 1, 'Sometimes' = 2, 'Often' = 3 and 'Always' = 4

Source: EM Consumer Research Survey August 2021 CQ9: Thinking about Covid-19, how often do you do the following to protect your health and the health of those around you?

However, whilst older age groups are more likely to wear face masks on public transport, it is the young who take Covid-19 antigen tests more frequently

IMPACT OF THE COVID-19 PANDEMIC ON NL CONSUMER BEHAVIOUR: ACTIONS TAKEN TO PROTECT HEALTH¹

■ Compliance Score² (colour intensity indicates frequency)

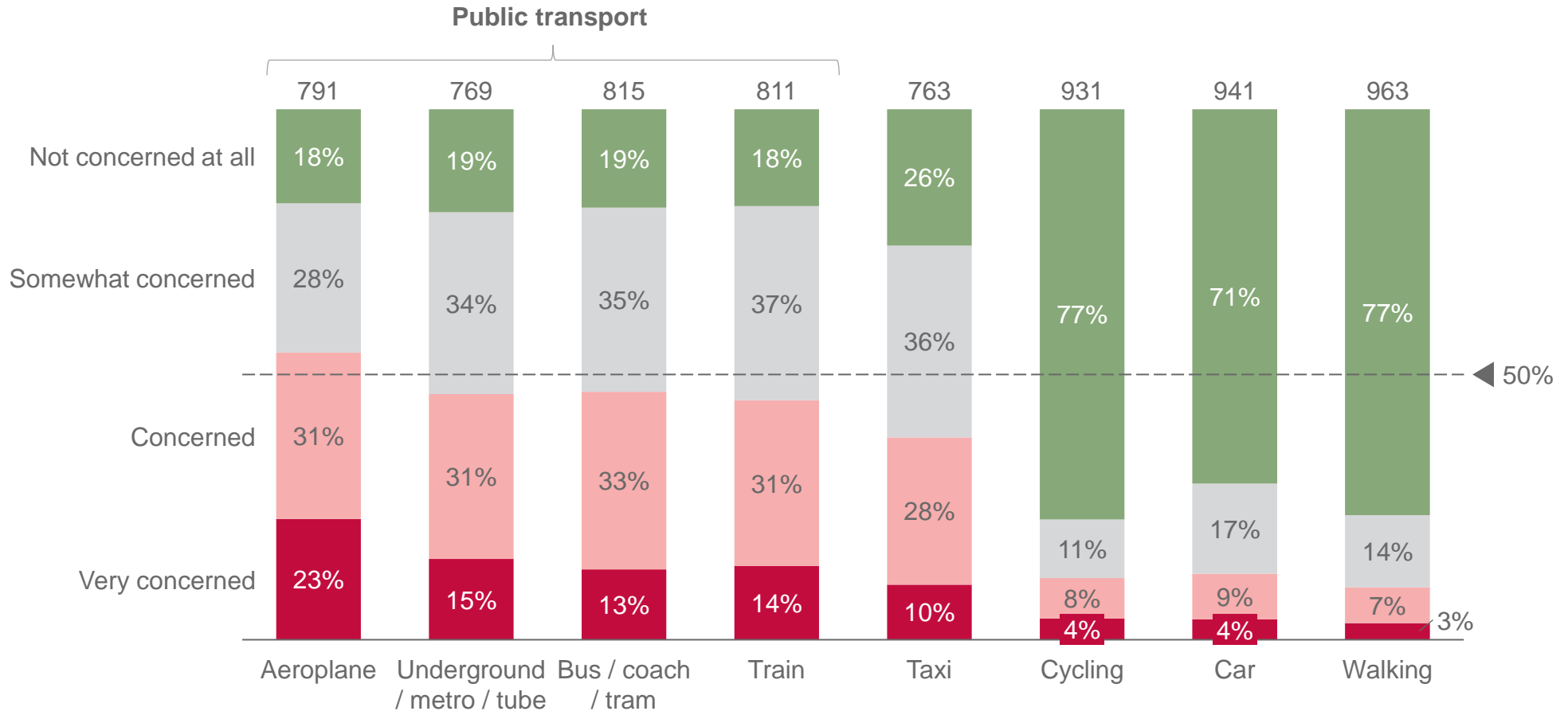


Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Compliance score calculated by assigning a numerical value to each answer code where 'Not at all' = 0, 'Rarely' = 1, 'Sometimes' = 2, 'Often' = 3 and 'Always' = 4

Source: EM Consumer Research Survey August 2021 CQ9: Thinking about Covid-19, how often do you do the following to protect your health and the health of those around you?

There are high levels of concern about using public transport and taxis, especially when it comes to travelling on aeroplanes

IMPACT OF THE COVID-19 PANDEMIC ON NL CONSUMER BEHAVIOUR: FEELINGS ABOUT USING DIFFERENT TRANSPORT METHODS¹

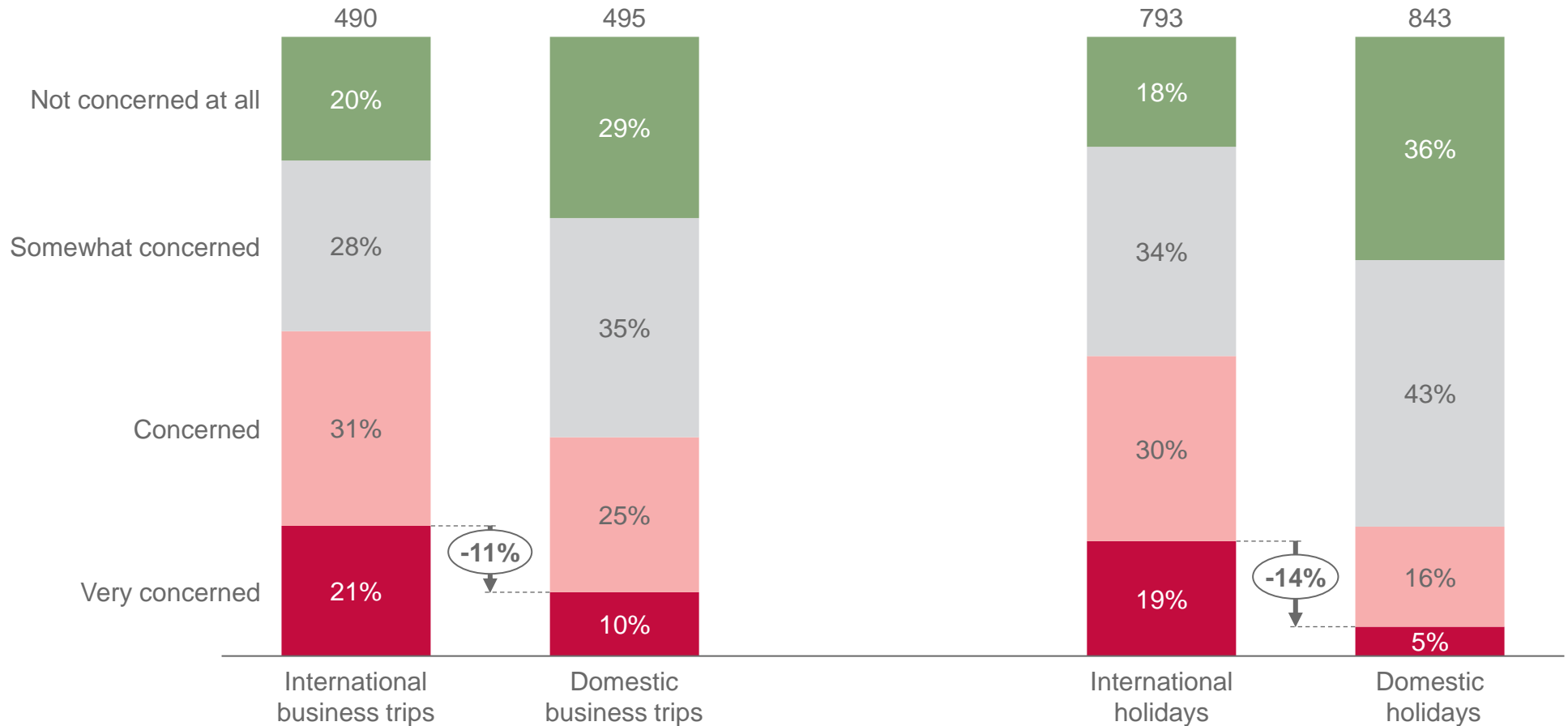


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey August 2021 CQ10: Thinking about the risk of getting / spreading Covid-19, how concerned are you about using each of the following modes of transport?

International travel for business and holidays is viewed as being significantly more risky from a Covid-19 perspective than domestic travel

IMPACT OF THE COVID-19 PANDEMIC ON NL CONSUMER BEHAVIOUR: FEELINGS ABOUT TRAVEL AND THE RISK OF COVID-19¹

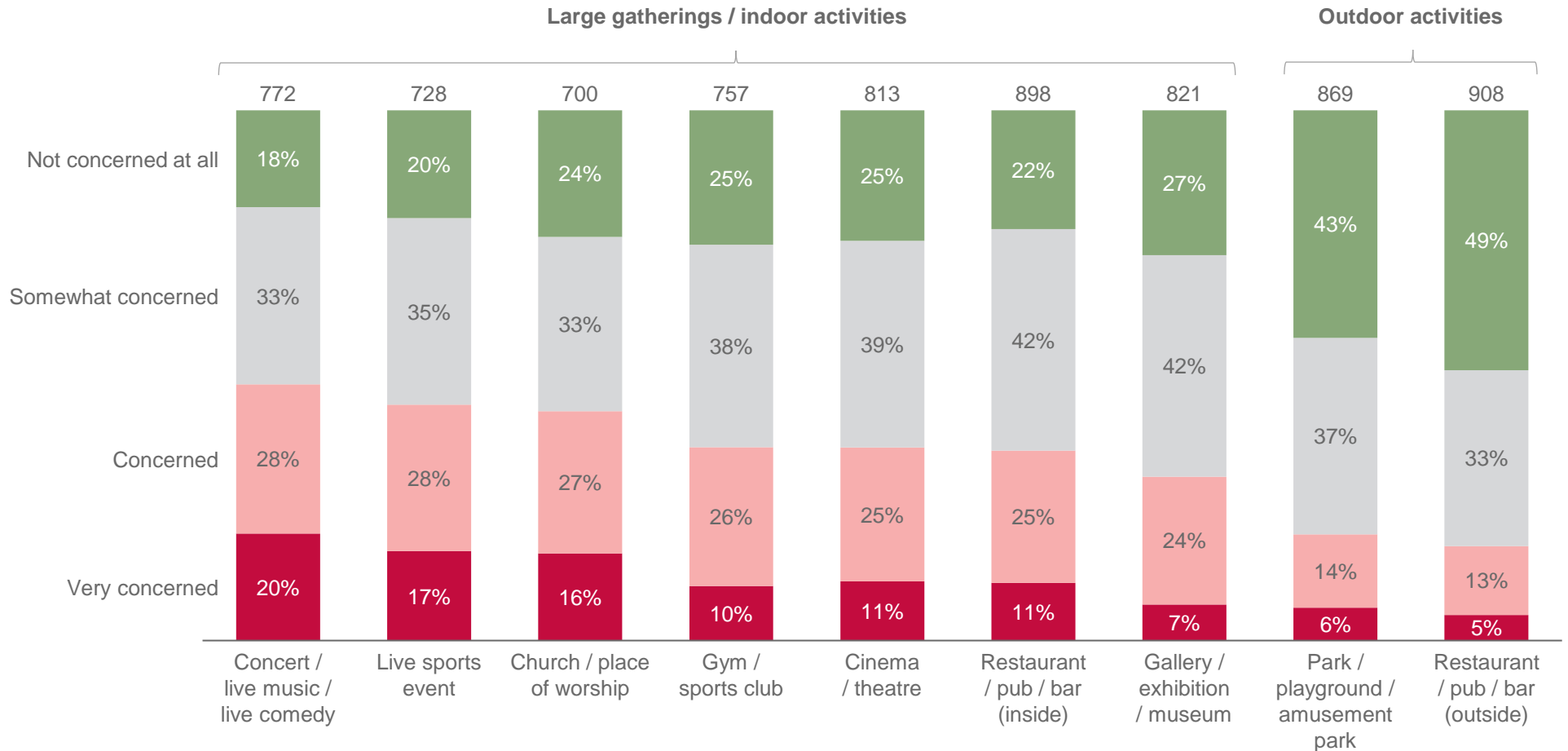


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey August 2021 CQ11: Thinking about the risk of getting / spreading Covid-19, when it comes to your personal choices around holidays / travel, how concerned are you about the following?

Respondents are most concerned about the risk posed by Covid-19 at large gatherings and indoor activities

IMPACT OF THE COVID-19 PANDEMIC ON NL CONSUMER BEHAVIOUR: FEELINGS ABOUT LEISURE TIME AND THE RISK OF COVID-19¹



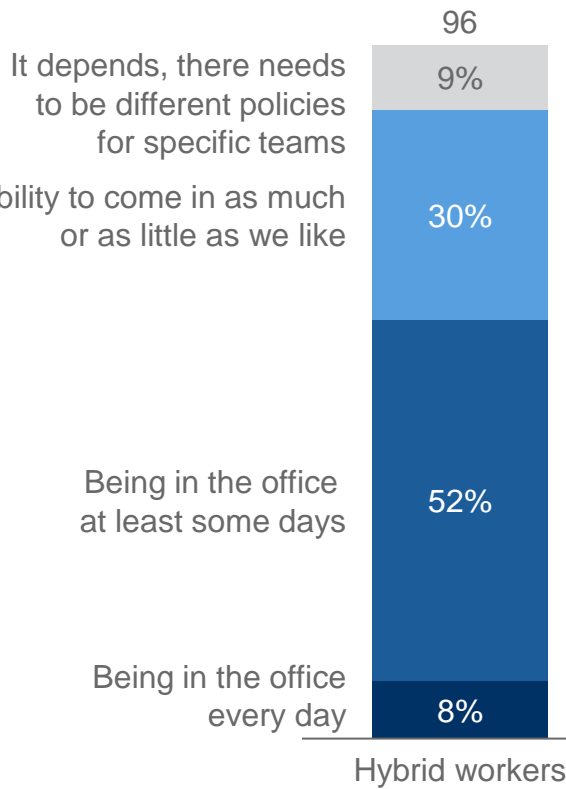
Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey August 2021 CQ12: Thinking about the risk of getting / spreading Covid-19, when it comes to how you spend your leisure time, how concerned are you about the following?

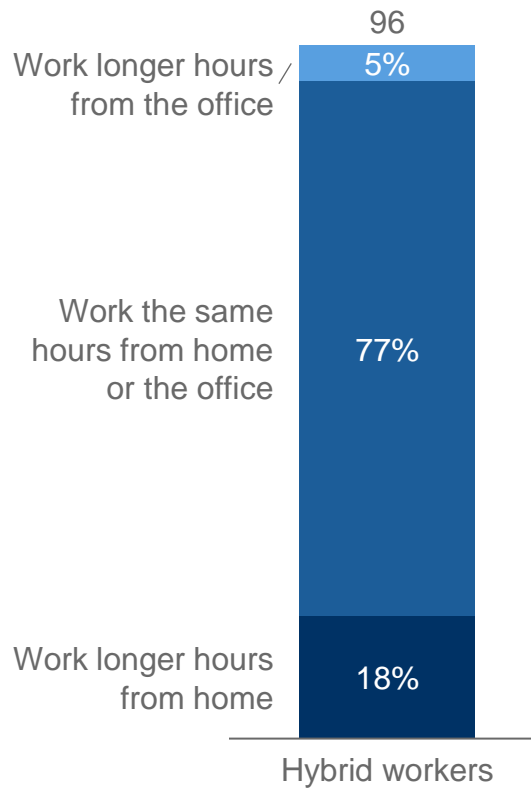
Hybrid working employees appear to be happy with their arrangement, which seems to have little impact on work-life balance for majority of respondents

NL WAYS OF WORKING: HYBRID WORKER PREFERENCES AND WORK-LIFE BALANCE¹

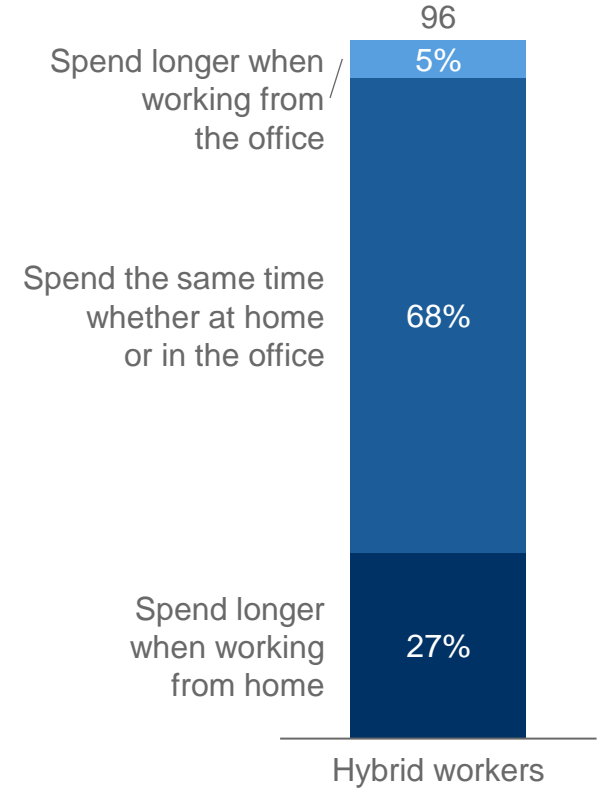
What is your preference for the company policy on working practices?



Hours worked at home vs in the office



Hours spent on domestic tasks at home vs in the office



Note: Total may not equal 100% due to rounding; 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey August 2021?; WQ15B: If you could set the policy for working from home and in the office for you and your colleagues each week, what would you choose? WQ16: How do your working hours compare on the days you work from home vs the days you are in the office; WQ17: How do the hours you spend on domestic / family tasks compare on the days when you work from home vs the days you are in the office?

Contents

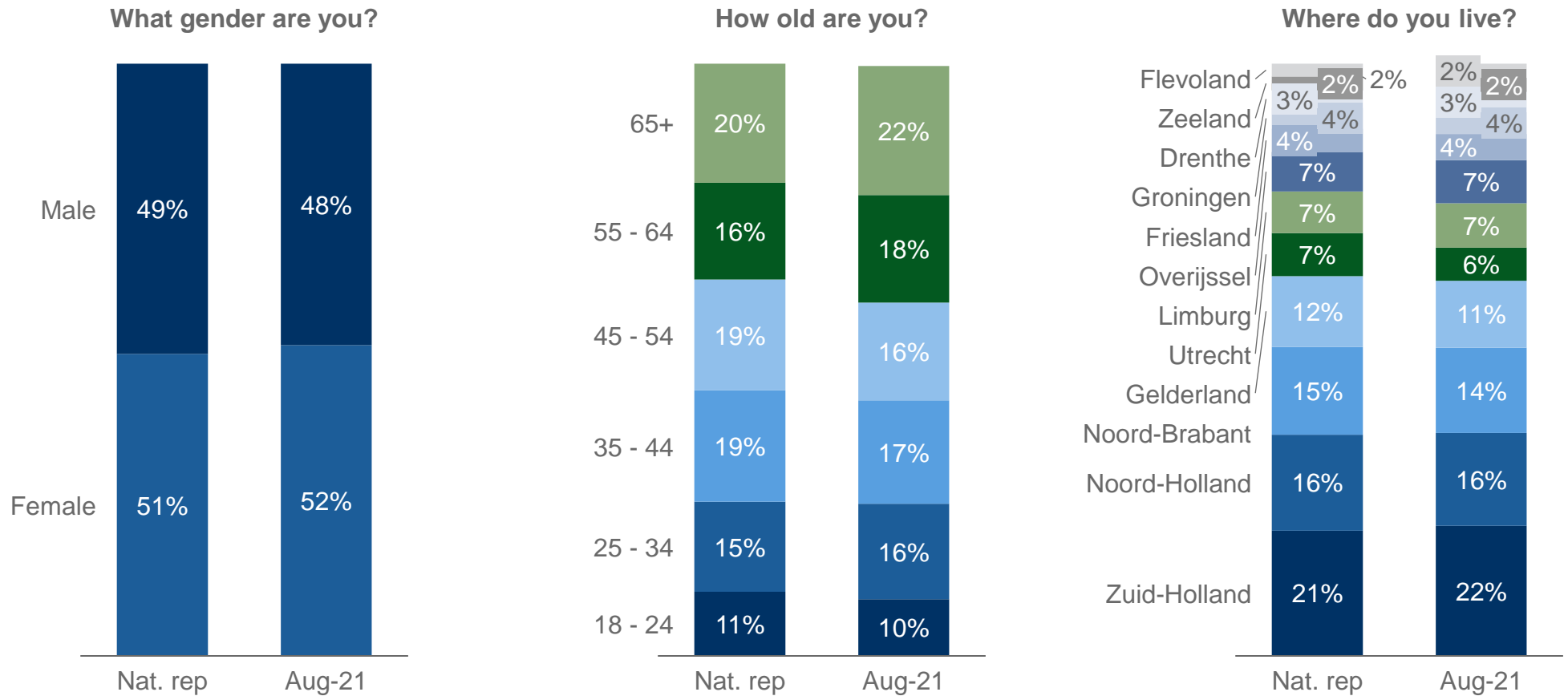


Key findings

Sample demographics

The respondents are a nationally representative sample in terms of gender, age and regional distribution

KEY FACTS ABOUT THE NETHERLANDS SAMPLE¹



Note: 1) Totals may not equal 100% due to rounding. Respondents who answered 'other' or 'prefer not to say' have not been displayed
 Source: EM Consumer Research Survey August 2021 S1: What gender do you identify as?; S2: How old are you?; S3: Where do you live?

Respondents for the hybrid working questions (page 9) were screened for office workers that mix home and office working during the week

SCREENING OF NL RESPONDENTS

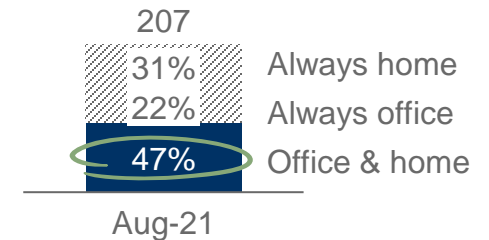
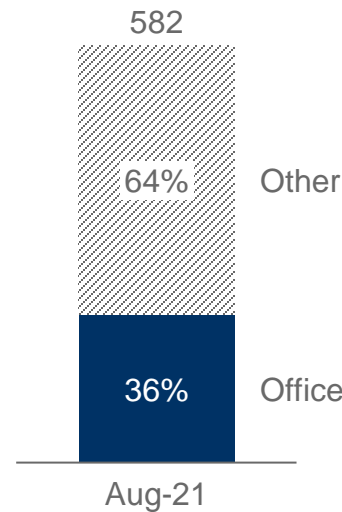
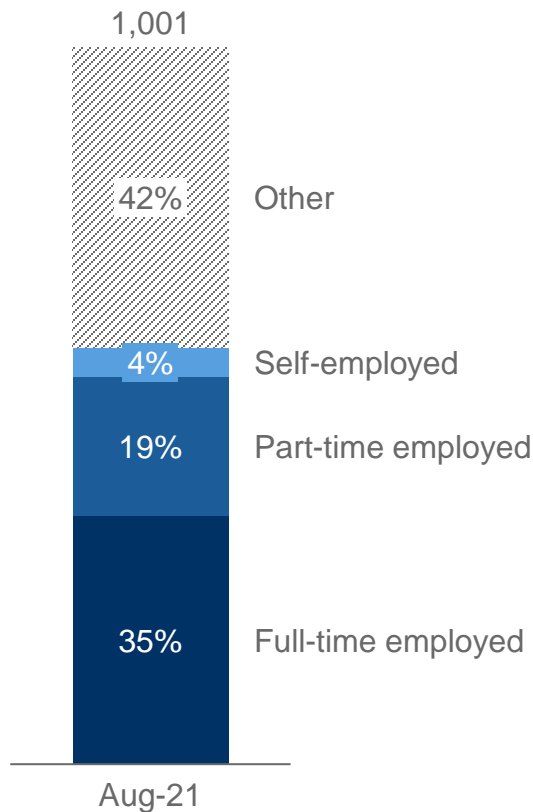
1 Screen for employment status



2 Screen for office working location



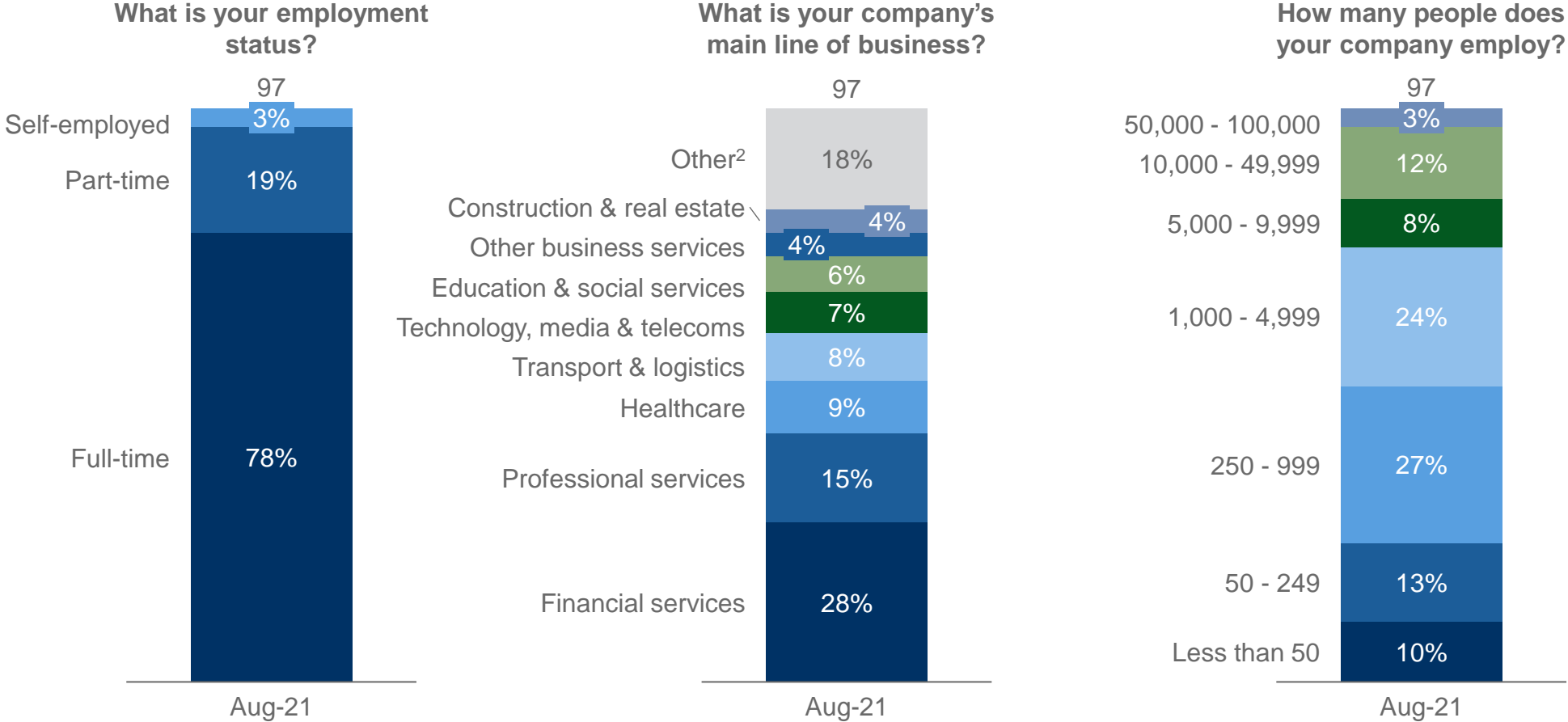
3 Screen for mixture of home & office working on a weekly basis



Source: EM Consumer Research Survey August 2021 WQ9: How would you describe your employment status?; WQ10: How would you describe the type of location you would normally spend most of your time working in?; WQ11: How many days do you work in an average week?; WQ12: In an average week, how many days do you work from home?

The screened respondents for the ways of working questions (page 9) were from a broad range of industries and worked for companies of varying sizes

NL WAYS OF WORKING: HYBRID OFFICE WORKERS¹



Note: 1) Excludes those who answered 'I don't know / doesn't apply / Prefer not to say'; 2) Other includes manufacturing, mining, public sector, retail, travel / tourism / leisure & utilities

Source: EM Consumer Research Survey August 2021: WQ9: How would you describe your employment status?; WQ21: What is your company's main line of business?; WQ22: How many people do your company employ in all of its locations?