



Eden McCallum Netherlands Consumer Survey

Environmental Sustainability – Consumer perspectives

November 2021



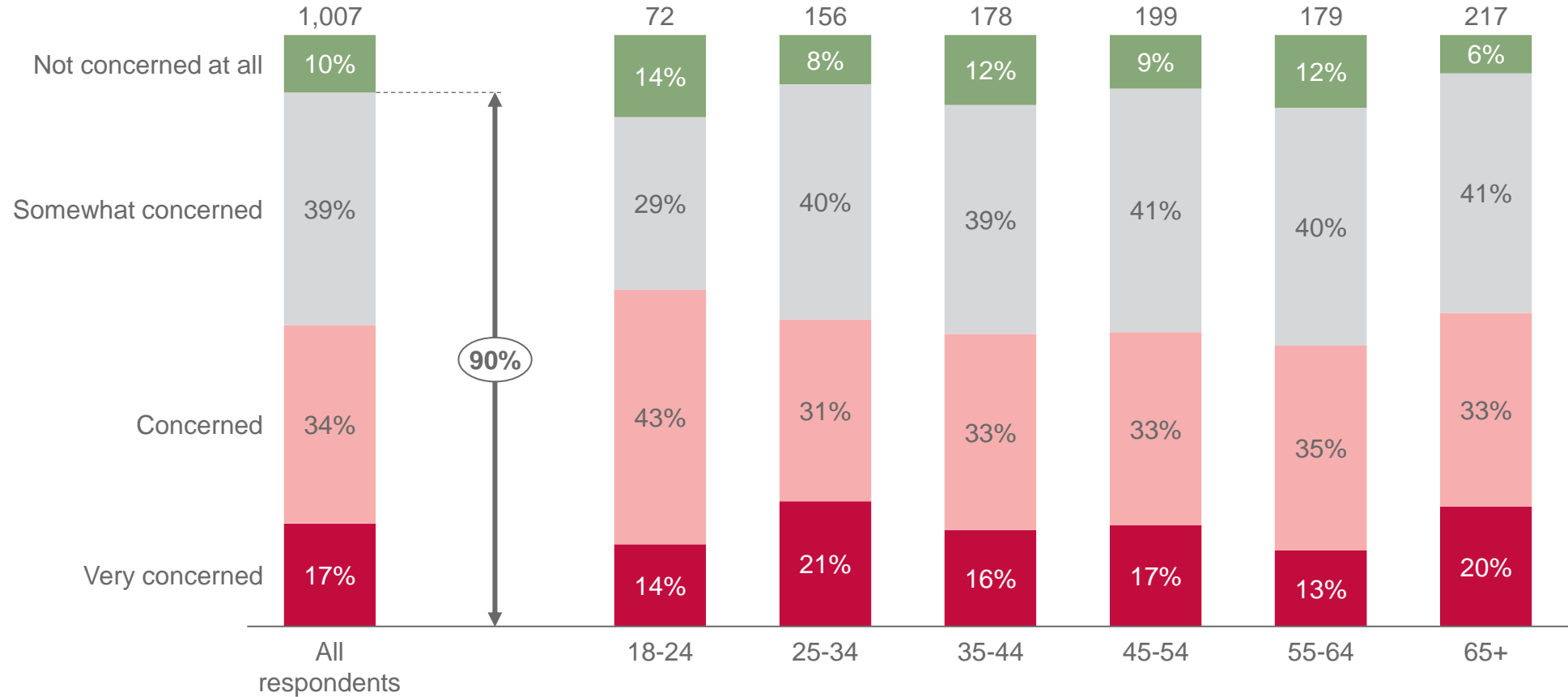
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Levels of concern about the environment are high across age groups

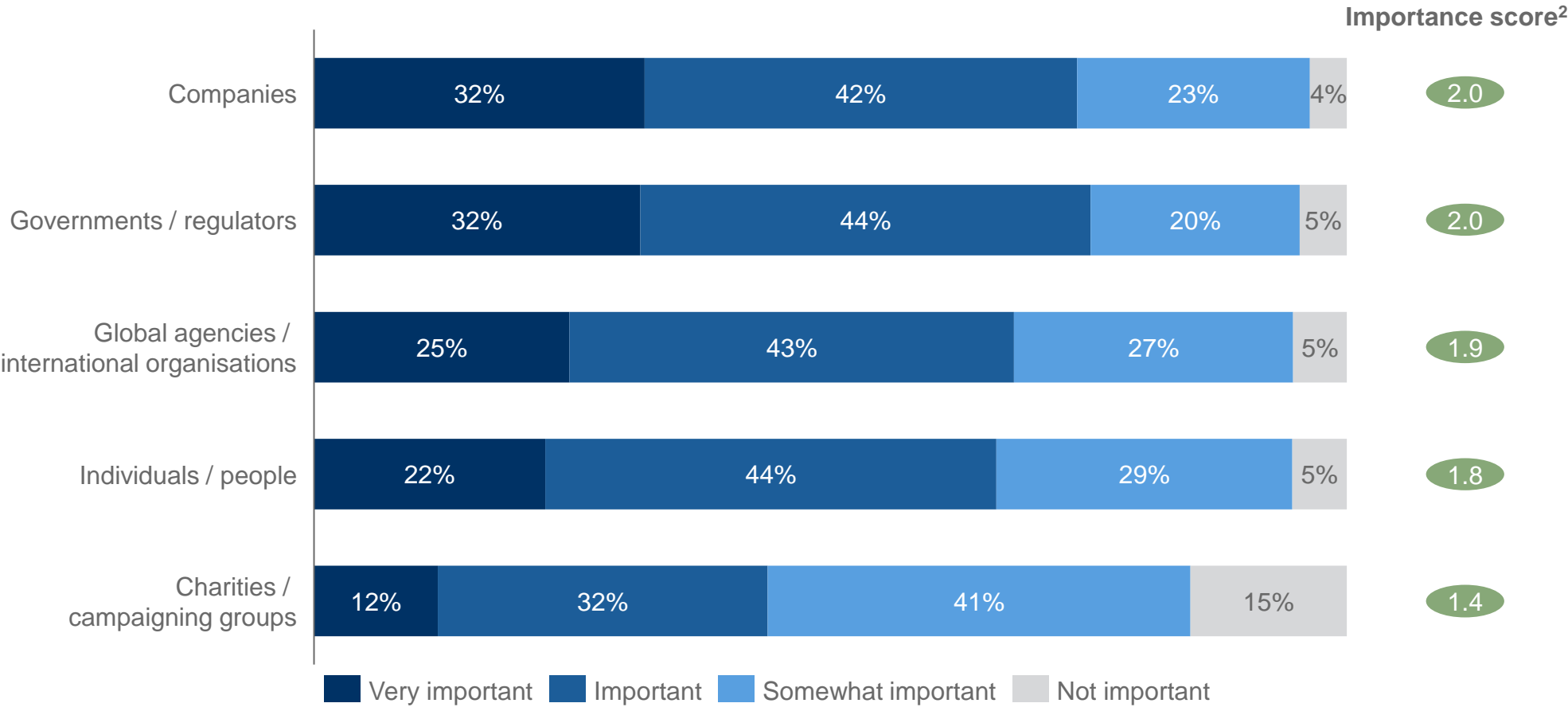
NL ENVIRONMENTAL SUSTAINABILITY: ENVIRONMENTAL CONCERN¹



Note: 1) Excludes those who answered 'I don't know / doesn't apply'
 Source: EM Consumer Research Survey October 2021 (n = 1007) SQ9: How concerned are you about the environment / sustainability?

People believe governments and companies have the biggest impact on the environment, while acknowledging the importance of their individual actions

NL ENVIRONMENTAL SUSTAINABILITY: IMPACT ON THE ENVIRONMENT / SUSTAINABILITY¹

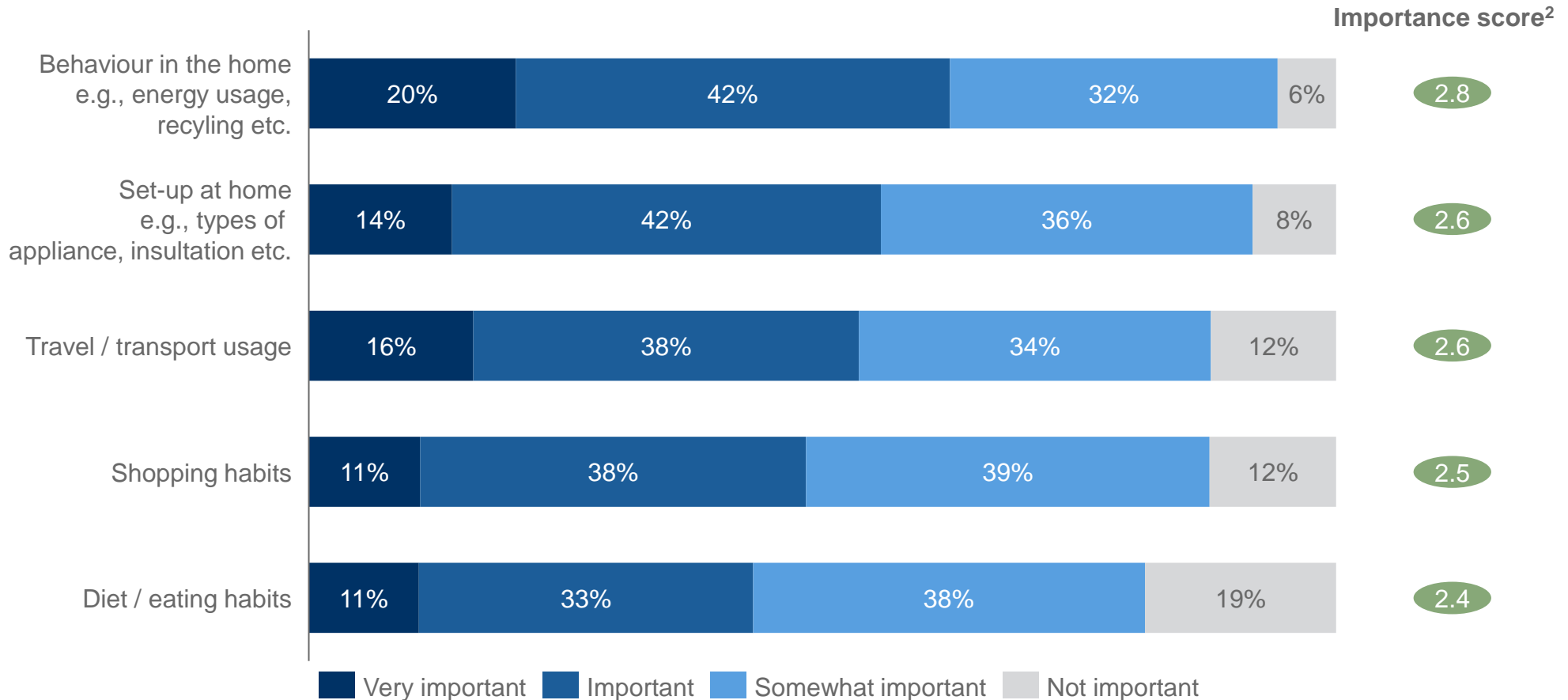


Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Importance score calculated by assigning a numerical value to each answer code where 'Very important' = 3, 'Important' = 2, 'Somewhat important' = 1, 'Not important' = 0

Source: EM Consumer Research Survey October 2021 (n = from 952 to 988) SQ10: How important do you think each of the following are in terms of the impact they have on the environment / sustainability?

When it comes to their personal behavior, consumers view their activities in the home as having the greatest environmental impact

NL ENVIRONMENTAL SUSTAINABILITY: IMPORTANCE OF PERSONAL BEHAVIOUR ON ENVIRONMENTAL IMPACT¹

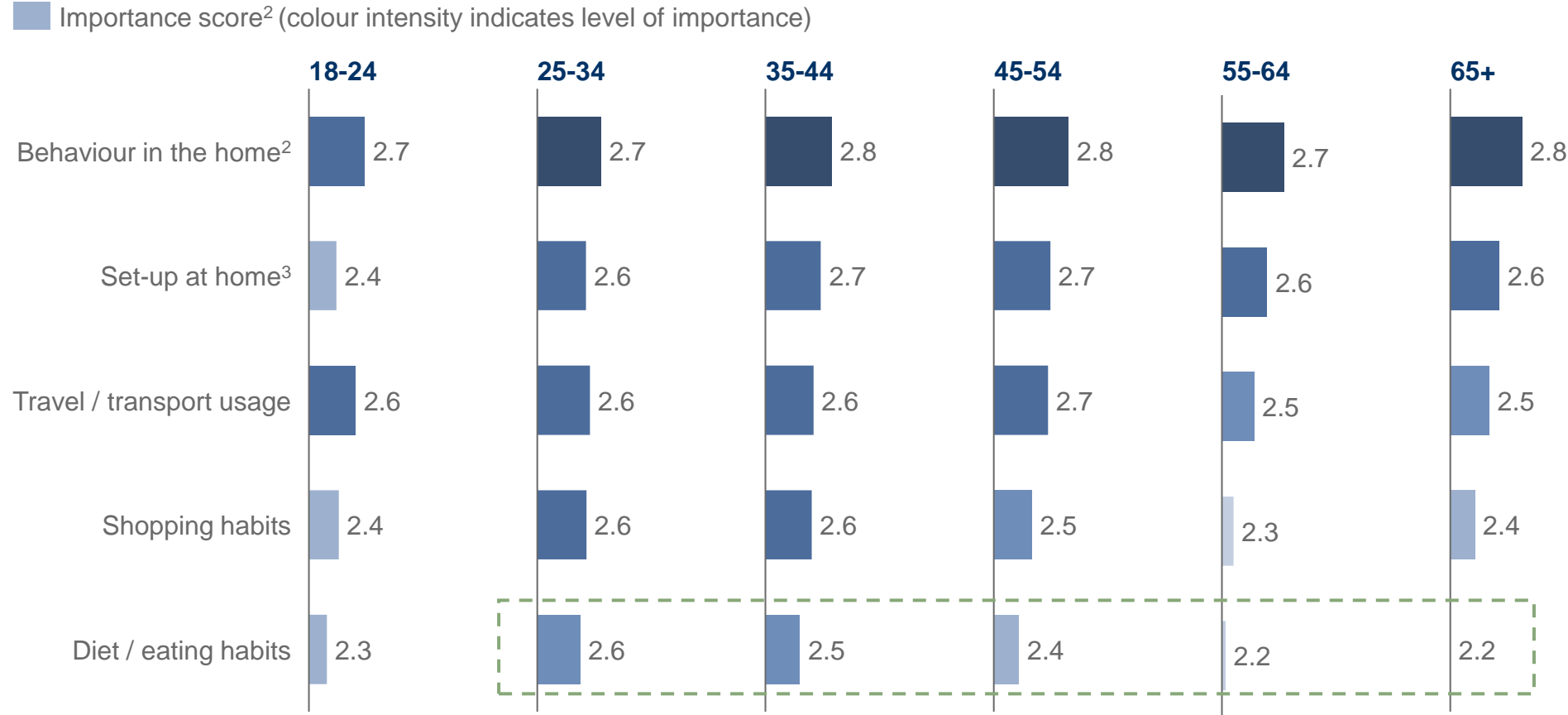


Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Importance score calculated by assigning a numerical value to each answer code where 'Not important' = 1, 'Somewhat important' = 2, 'Important' = 3 and 'Very important' = 4

Source: EM Consumer Research Survey October 2021 (n = from 943 to 1003) SQ11: How important do you think your personal behaviour in each of the following areas is in terms of its impact on the environment / sustainability?

However, views on the impact of different behaviours varies by age group; younger generations attach more importance to their eating habits

NL ENVIRONMENTAL SUSTAINABILITY: IMPORTANCE OF PERSONAL BEHAVIOUR ON ENVIRONMENTAL IMPACT¹

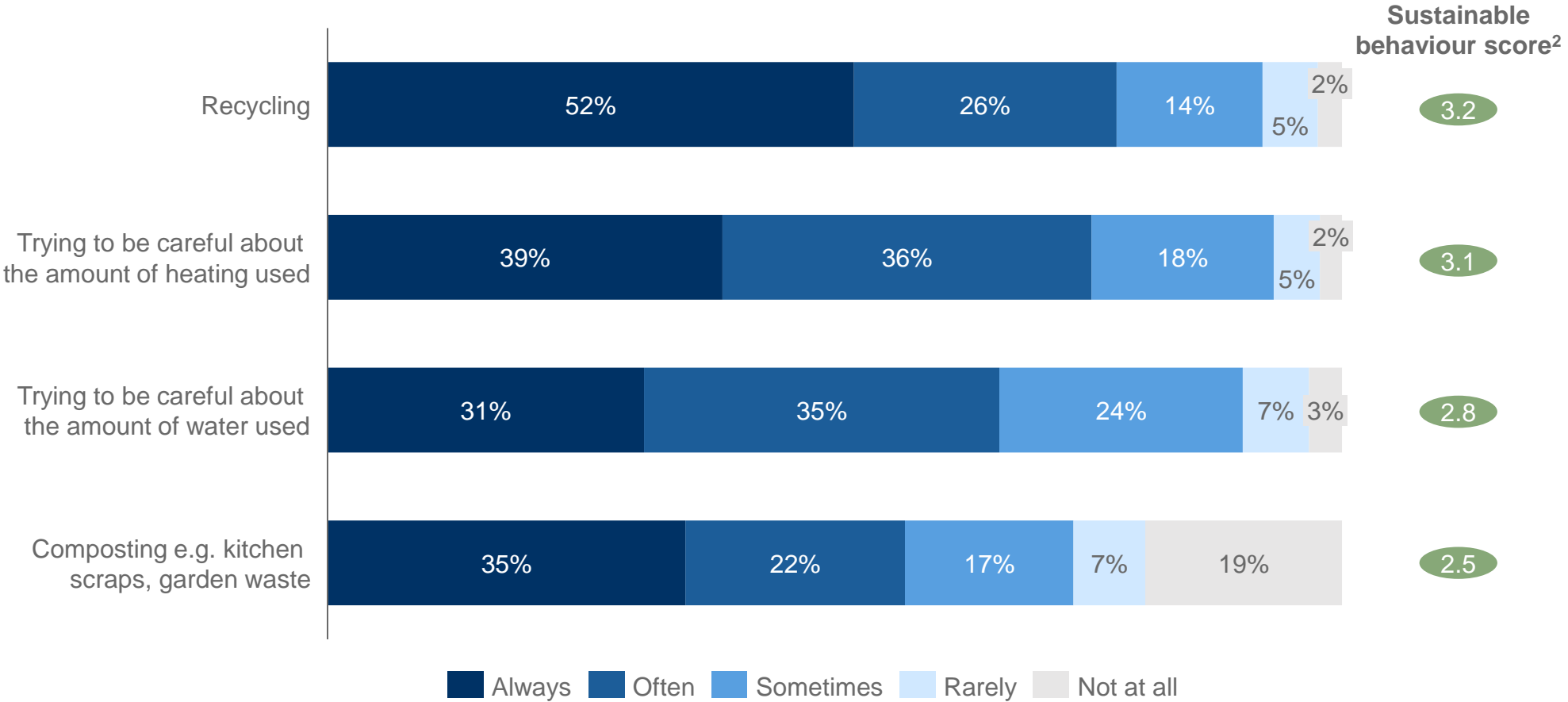


Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Importance score calculated by assigning a numerical value to each answer code where 'Not important' = 1, 'Somewhat important' = 2, 'Important' = 3 and 'Very important' = 4; 3) E.g., Energy usage, recycling etc.; 4) E.g., Types of appliance, use of insulation etc.; Source: EM Consumer Research Survey October 2021 (n = from 936 to 996) SQ11: How important do you think your personal behaviour in each of the following areas is in terms of its impact on the environment / sustainability?

In the home, recycling and watching energy usage are the most common actions people are taking



NL ENVIRONMENTAL SUSTAINABILITY: EXTENT OF SUSTAINABLE BEHAVIOUR AT HOME¹



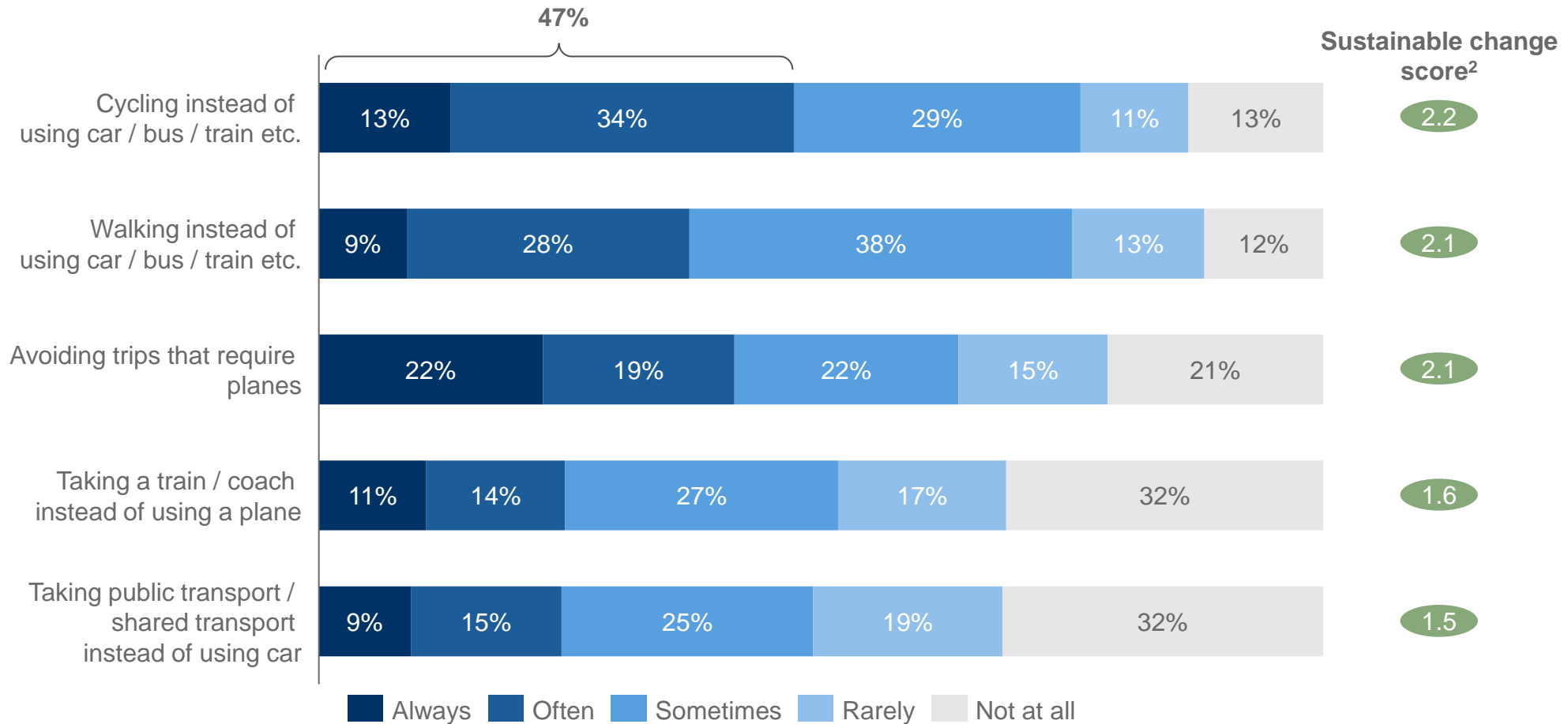
Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Sustainable behaviour score calculated by assigning a numerical value to each answer code where 'Always' = 4, 'Often' = 3, 'Sometimes' = 2, 'Rarely' = 1, 'Not at all' = 0

Source: EM Consumer Research Survey October 2021 (n = 975 to 1013) SQ12: To what extent are you doing each of the following at home?

When travelling, almost half of Dutch consumers always/often cycle or walk as an alternative to using a car, bus, or train



NL ENVIRONMENTAL SUSTAINABILITY: EXTENT OF TRAVELING MORE SUSTAINABLY¹



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

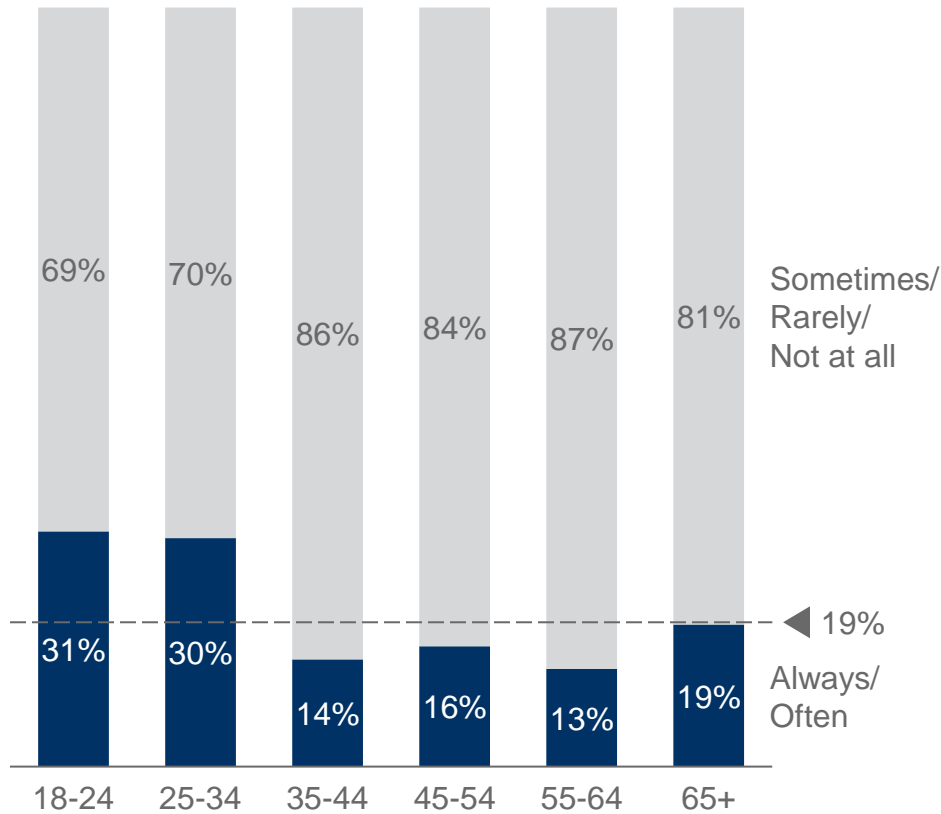
Source: EM Consumer Research Survey October 2021 (n = from 795 to 981) SQ14: To what extent are you doing each of the following for your transport / travel?

Younger respondents are more likely to be seeking out alternative modes of transport

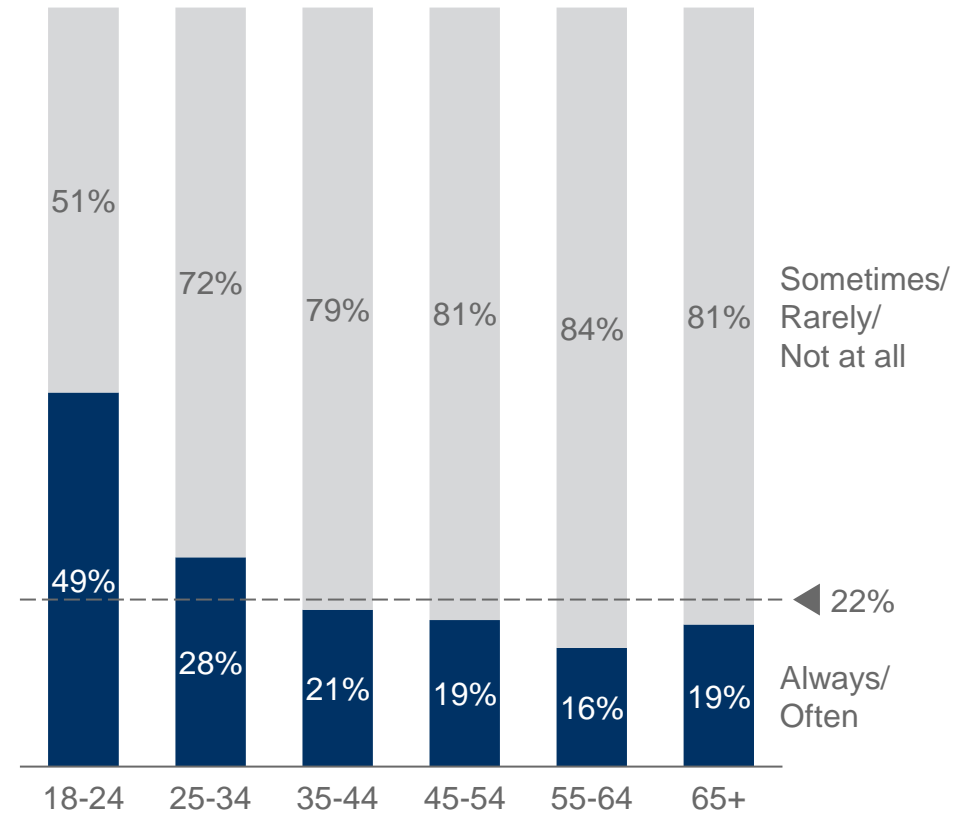


NL ENVIRONMENTAL SUSTAINABILITY: EXTENT OF TRAVELING MORE SUSTAINABLY¹

Taking a train / coach instead of using a plane



Taking public transport / shared transport instead of using car



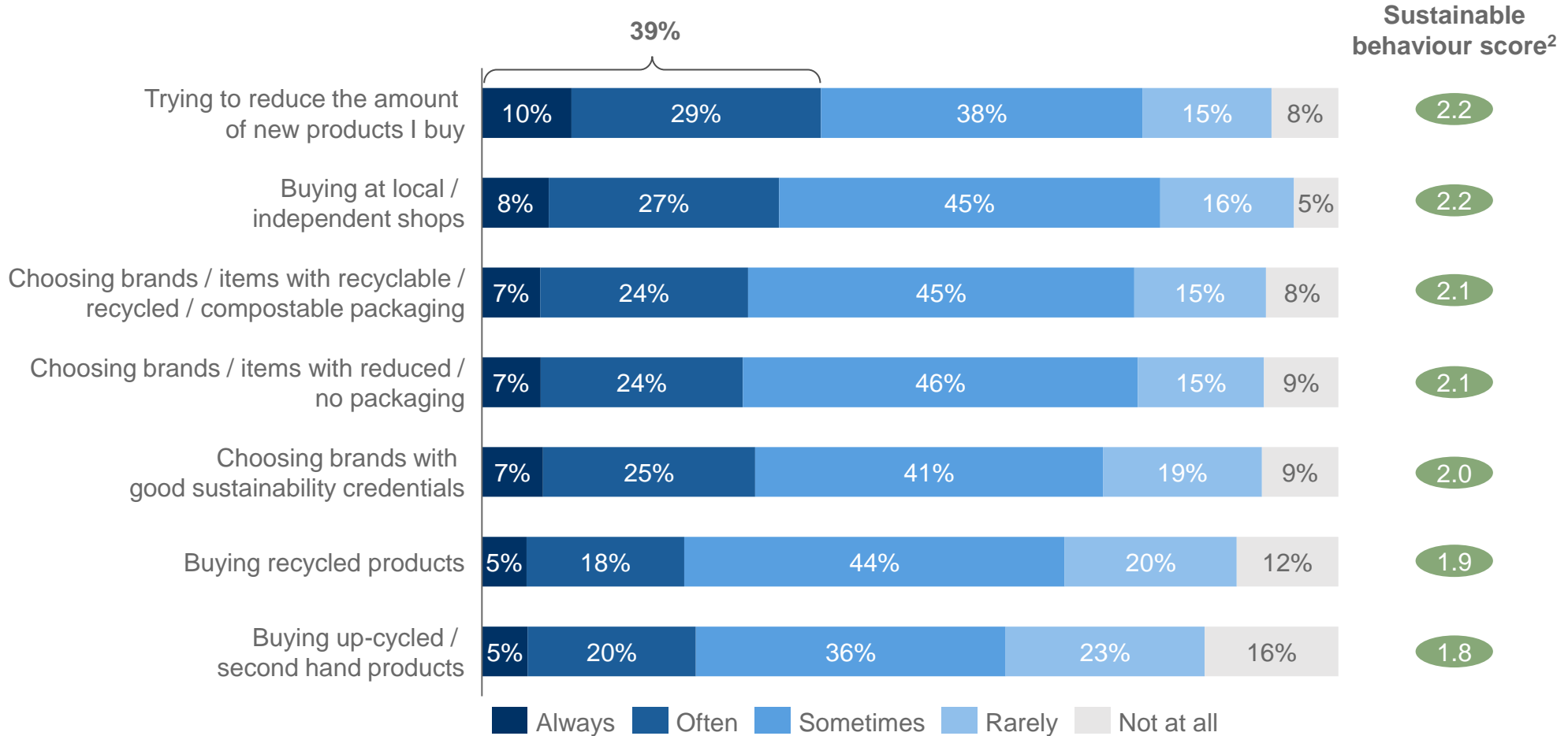
Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2021 (n = from 795 to 939) SQ14: To what extent are you doing each of the following for your transport / travel?

When shopping, c.40% of Dutch consumers are trying to buy fewer products



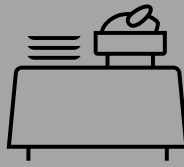
NL ENVIRONMENTAL SUSTAINABILITY: EXTENT OF BUYING MORE SUSTAINABLY¹



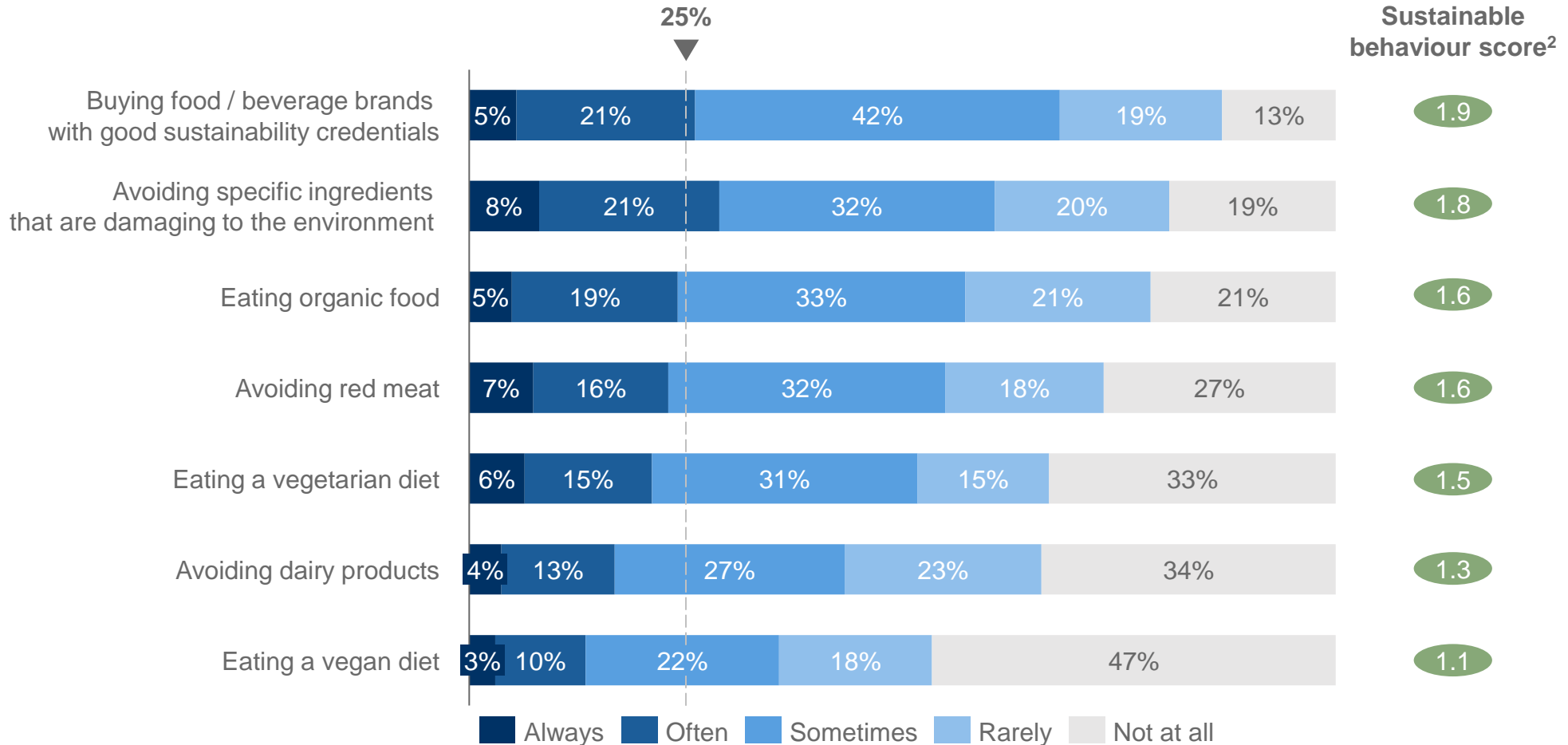
Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Sustainable behaviour score calculated by assigning a numerical value to each answer code where 'Always' = 4, 'Often' = 3, 'Sometimes' = 2, 'Rarely' = 1, 'Not at all' = 0

Source: EM Consumer Research Survey October 2021 (n = from 953 to 986) SQ15: To what extent are you doing each of the following when shopping?

When eating, about 1/4th of Dutch consumers try to avoid damaging ingredients and look for brands with good sustainability credentials



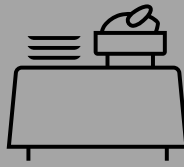
NL ENVIRONMENTAL SUSTAINABILITY: EXTENT OF EATING MORE SUSTAINABLY¹



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

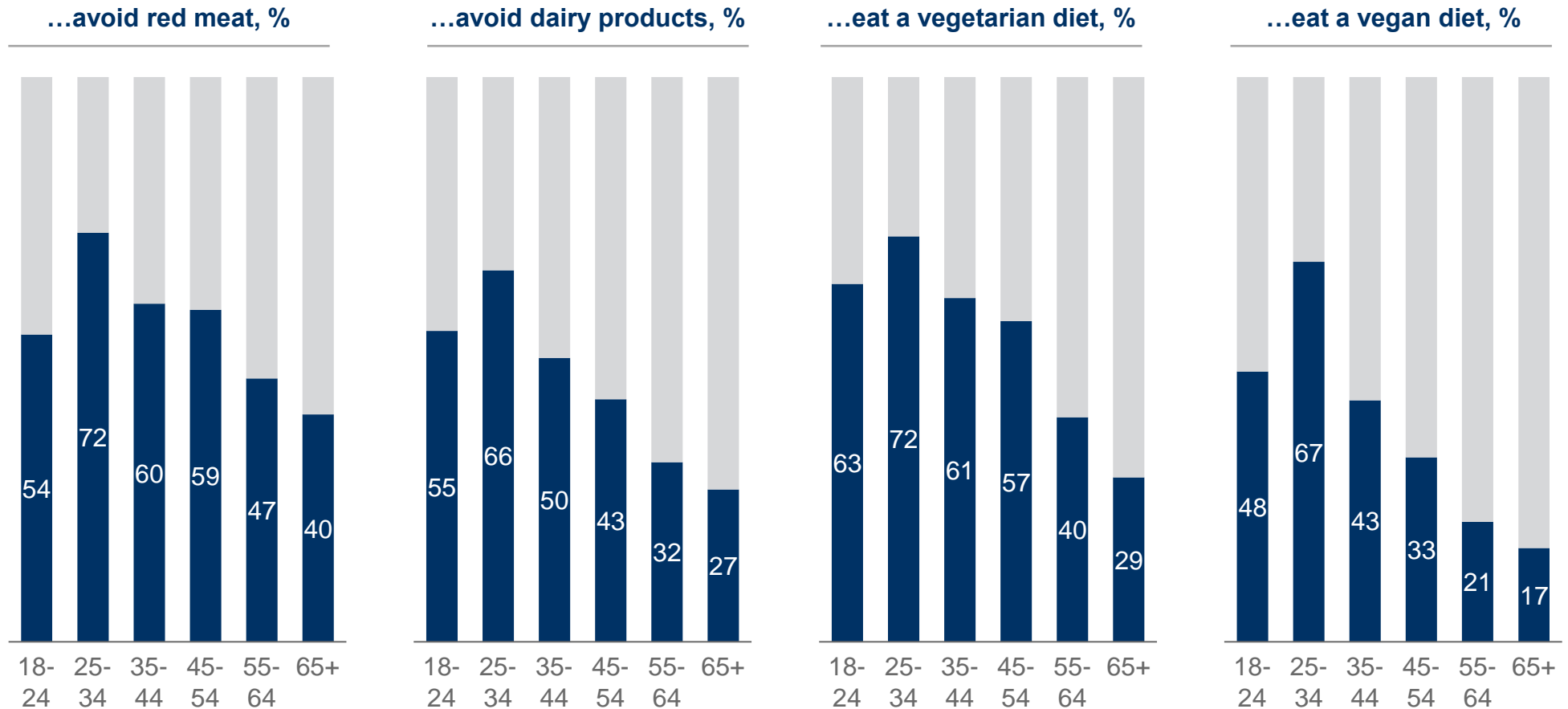
Source: EM Consumer Research Survey October 2021 (n = from 953 to 1001) SQ16: To what extent are you doing each of the following for your eating habits / diet?

Younger respondents are more likely to have cut out specific food groups entirely



NL ENVIRONMENTAL SUSTAINABILITY: EXTENT OF EATING MORE SUSTAINABLY¹

People who sometimes to always...



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

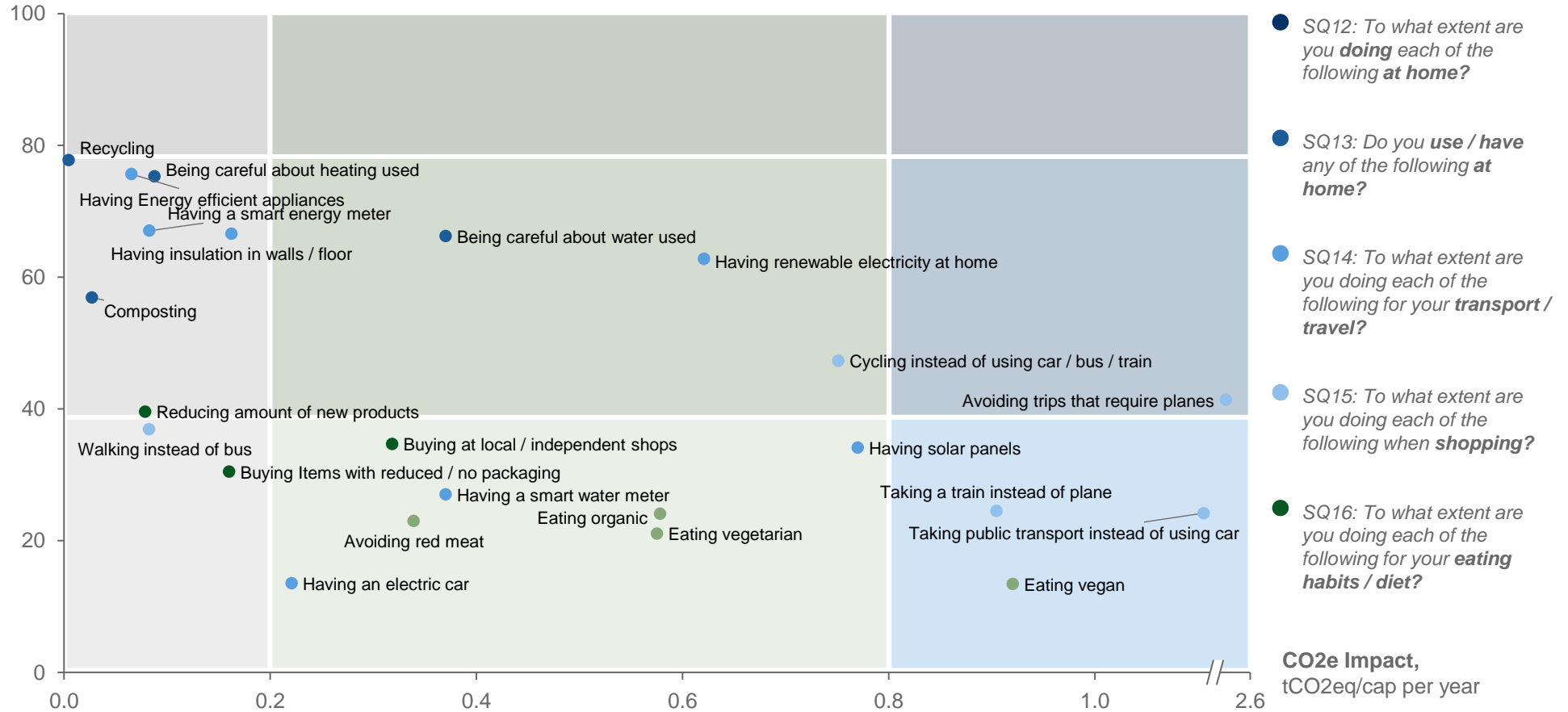
Source: EM Consumer Research Survey October 2021 (n = from 988 to 994) SQ16: To what extent are you doing each of the following for your eating habits / diet?



The climate change mitigation options with the highest impact still have a relatively low penetration

NL ENVIRONMENTAL SUSTAINABILITY: PENETRATION OF SUSTAINABLE ALTERNATIVES VS CO₂EQ IMPACT¹

Penetration², %



- SQ12: To what extent are you **doing** each of the following **at home**?
- SQ13: Do you **use / have** any of the following **at home**?
- SQ14: To what extent are you **doing** each of the following for your **transport / travel**?
- SQ15: To what extent are you **doing** each of the following when **shopping**?
- SQ16: To what extent are you **doing** each of the following for your **eating habits / diet**?

Note: 1) Excludes those who answered 'I don't know / doesn't apply' 2) % of respondents who always/often buy/use/eat sustainable alternatives or use/have sustainable solution at home

Source: EM Consumer Research Survey October 2021 (n = from 790 to 1013)

EU/Europe data from: Quantifying the potential for climate change mitigation of consumption options - Diana Ivanova et al 2020 Environ. Res. Lett. 15

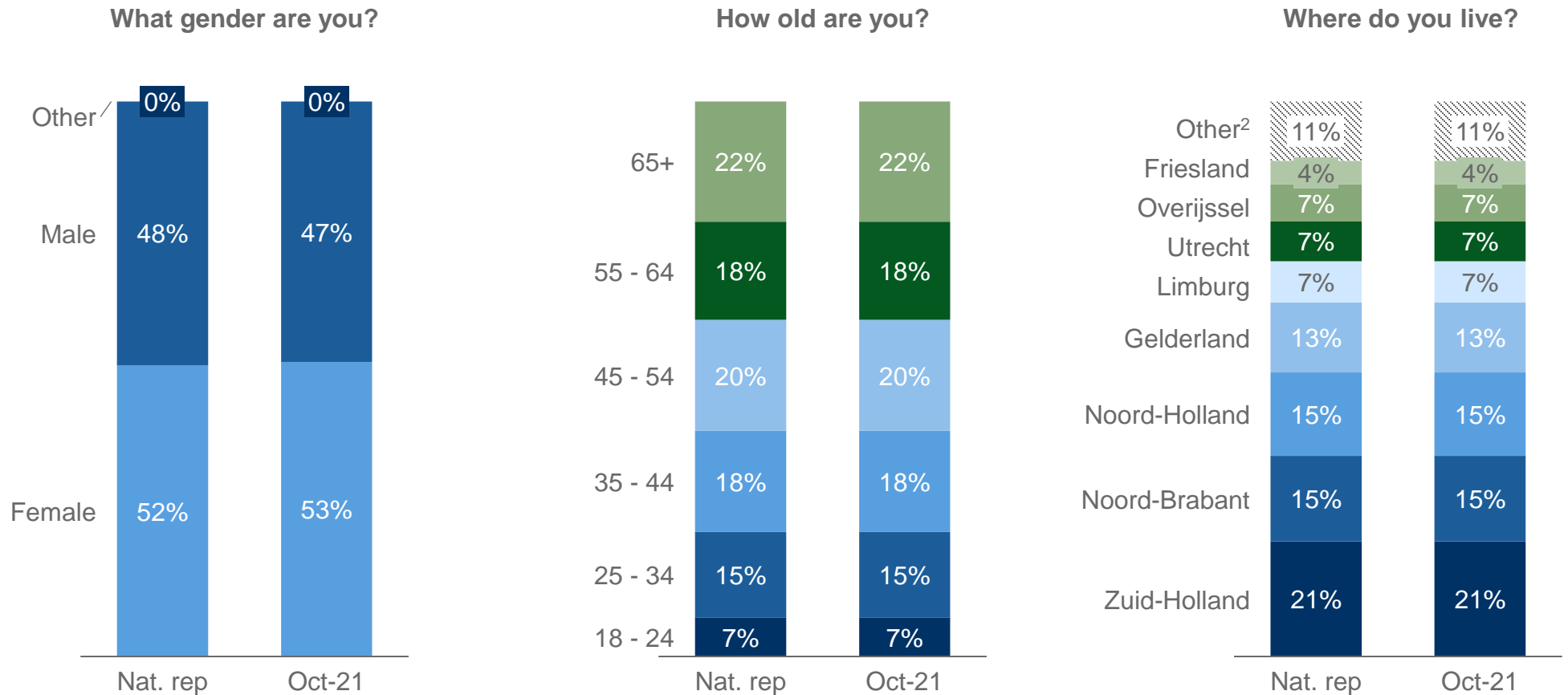
Contents



Sample demographics

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

KEY FACTS ABOUT THE NL SAMPLE¹



Note: 1) Totals may not equal 100% due to rounding. Respondents who answered 'other' or 'prefer not to say' have not been displayed. 2) Zeeland, Groningen, Flevoland, Drenthe
 Source: EM Consumer Research Survey October 2021 (n = 1018) S1: What gender do you identify as?; S2: How old are you?; S3: Where do you live?