



Eden McCallum Consumer sentiment survey: Netherlands

July 2022

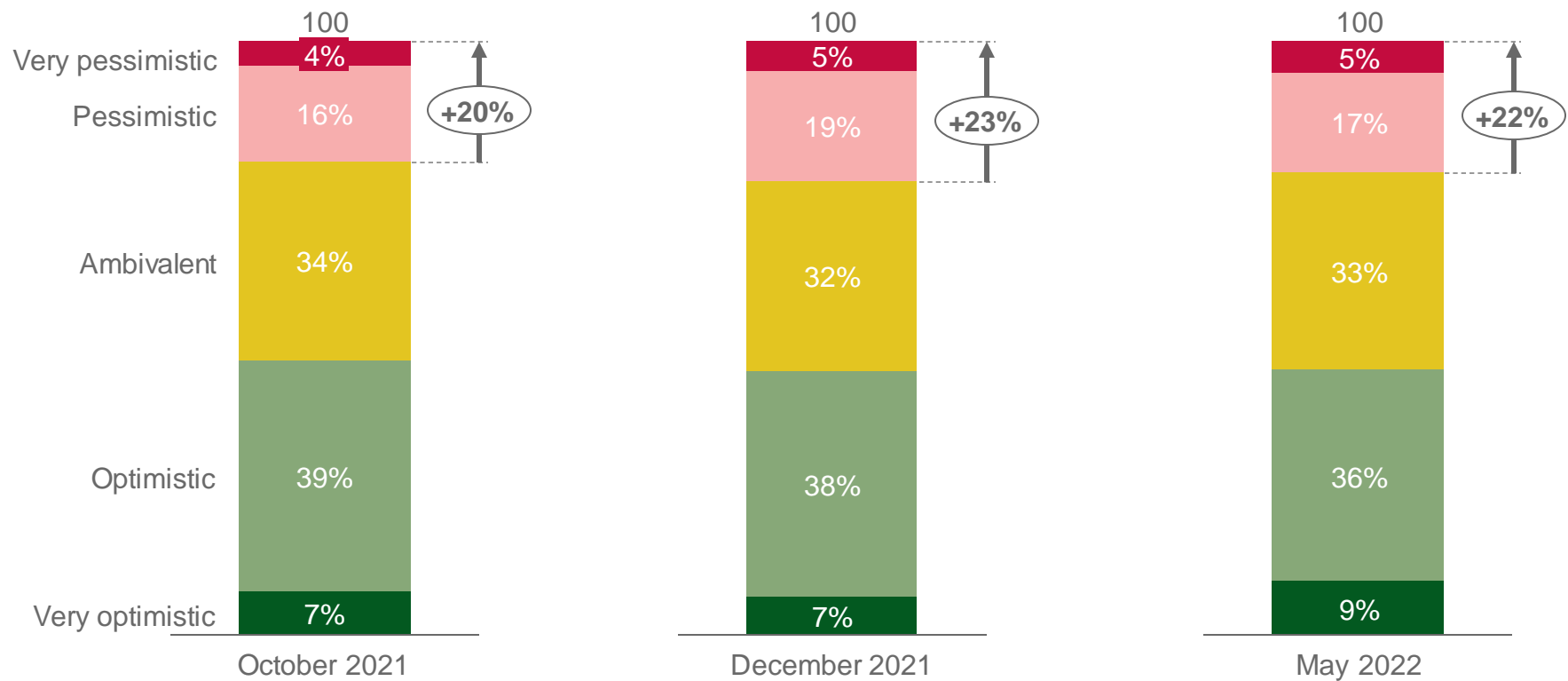
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Levels of optimism and pessimism about the future have remained broadly flat since October 2021

DUTCH RESPONDENTS' VIEWS ON HOW THEY FEEL ABOUT THE FUTURE, OCTOBER 2021, DECEMBER 2021 & MAY 2022



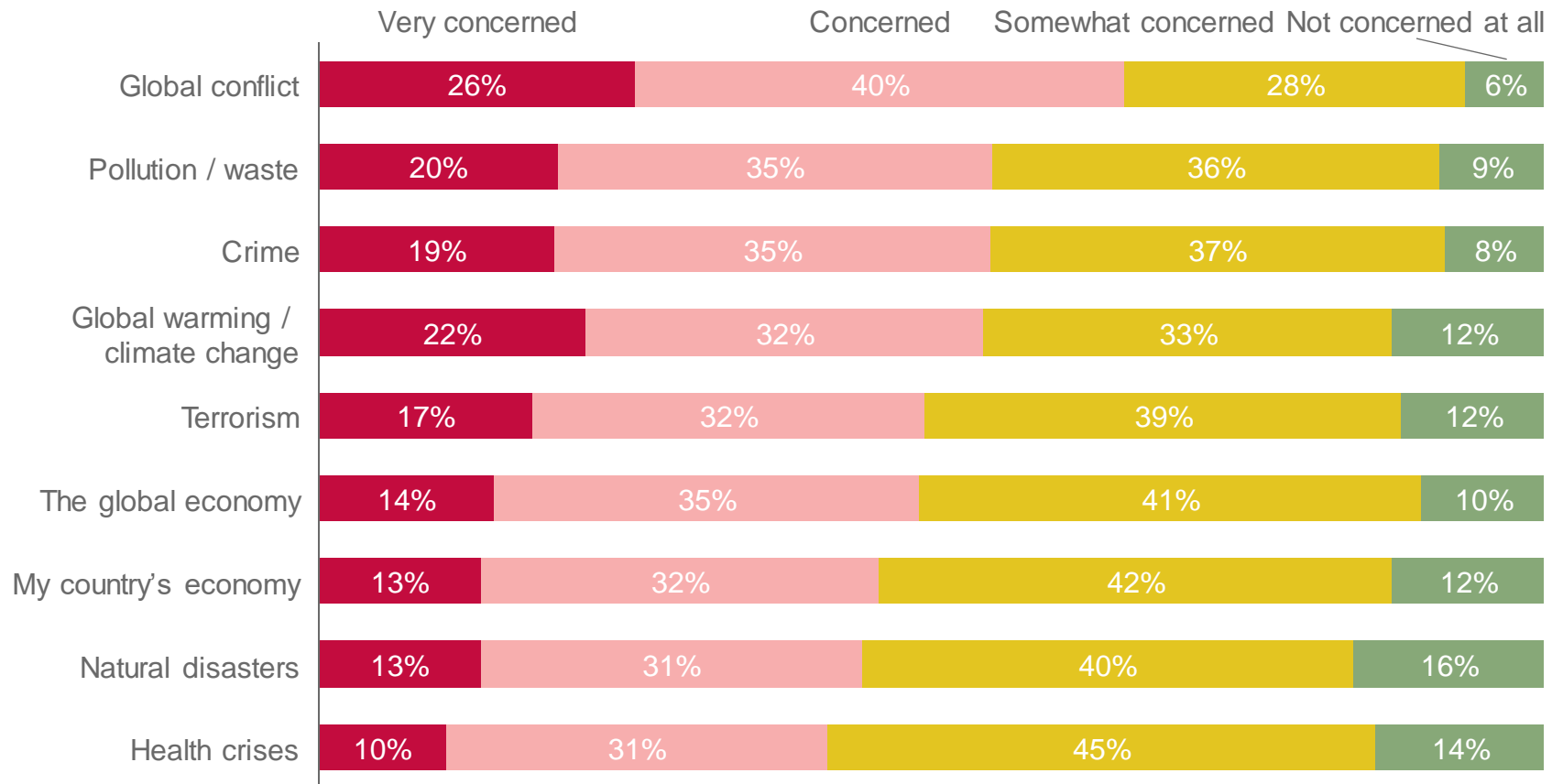
Note: October 2021 n = 998, December 2021 n = 2011, May 2022 n = 2909, Question: 'At present, when thinking about the future, how are you feeling overall?', excludes those who answered 'I don't know / doesn't apply'; due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

2 Consumer sentiment survey: Netherlands

On a national / global level, there are high levels of concern across all dimensions tested, particularly global conflict...

DUTCH RESPONDENTS' VIEWS ON ISSUES FACING COUNTRY AND WORLD, MAY 2022

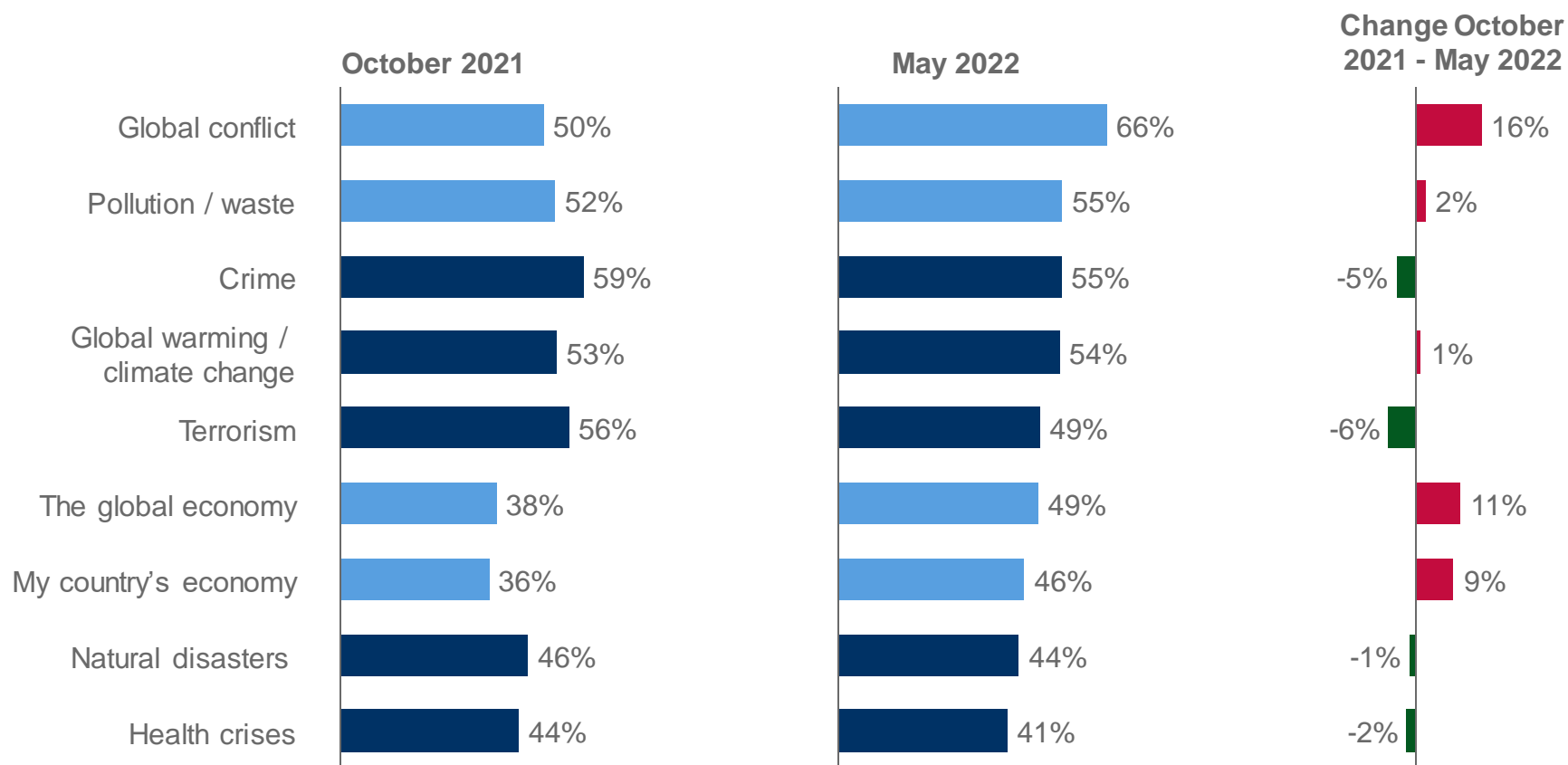


Note: May 2022 n = 2866 - 2906, Question: 'Thinking about specific issues facing your country and the world in general, how do you feel about the following?', excludes those who answered 'I don't know / doesn't apply'; due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

...with concern about global conflict, and both the national and global economy, increasing since October 2021

SHARE OF RESPONDENTS WHO WERE CONCERNED OR VERY CONCERNED, OCTOBER 2021 & MAY 2022

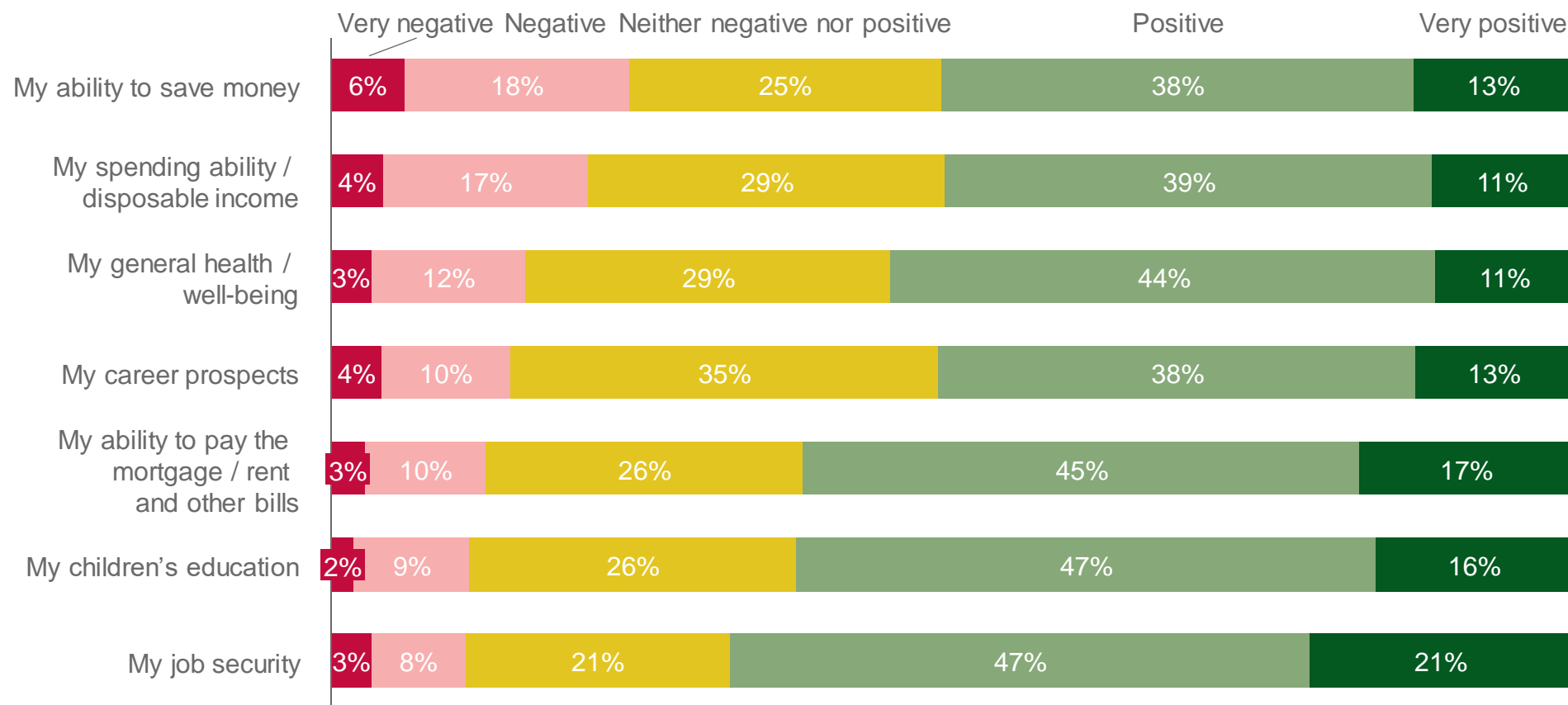


Note: October 2021 n = 985 - 1008, May 2022 n = 2866 - 2906, Question: 'Thinking about specific issues facing your country and the world in general, how do you feel about the following?', excludes those who answered 'I don't know / doesn't apply', due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

On a personal level, consumers are most concerned by their ability to save and spend

DUTCH RESPONDENTS' VIEWS ON PERSONAL ISSUES FACED, MAY 2022

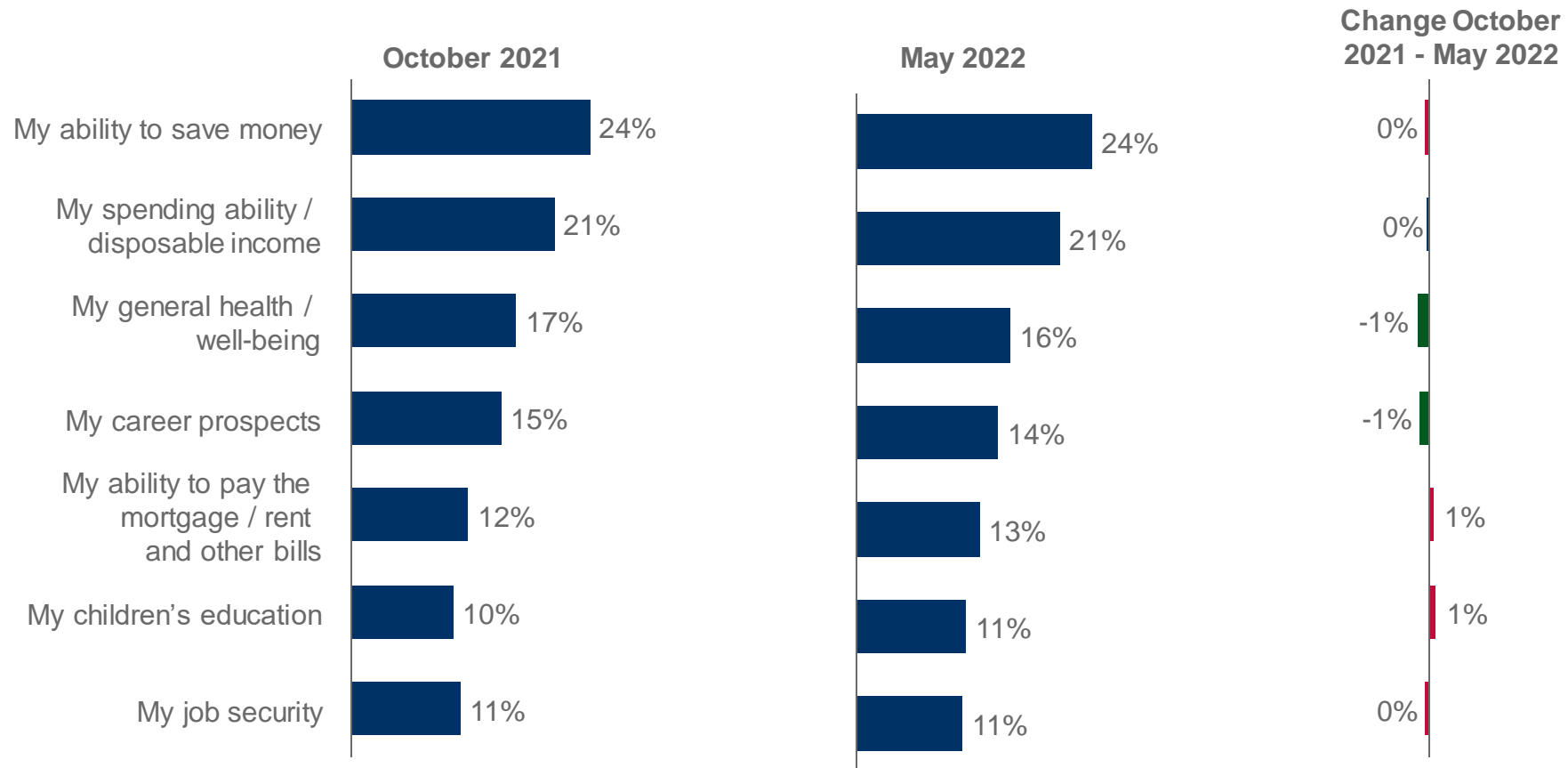


Note: May 2022 n = 1652 - 2941, Question: 'Now thinking about specific issues you are facing on a personal level, how do you feel about the following?', excludes those who answered 'I don't know / doesn't apply'; due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

There has been no significant change in consumers' level of concern across the personal dimensions tested since October 2021

SHARE OF RESPONDENTS WHO WERE VERY NEGATIVE OR NEGATIVE, OCTOBER 2021 & MAY 2022

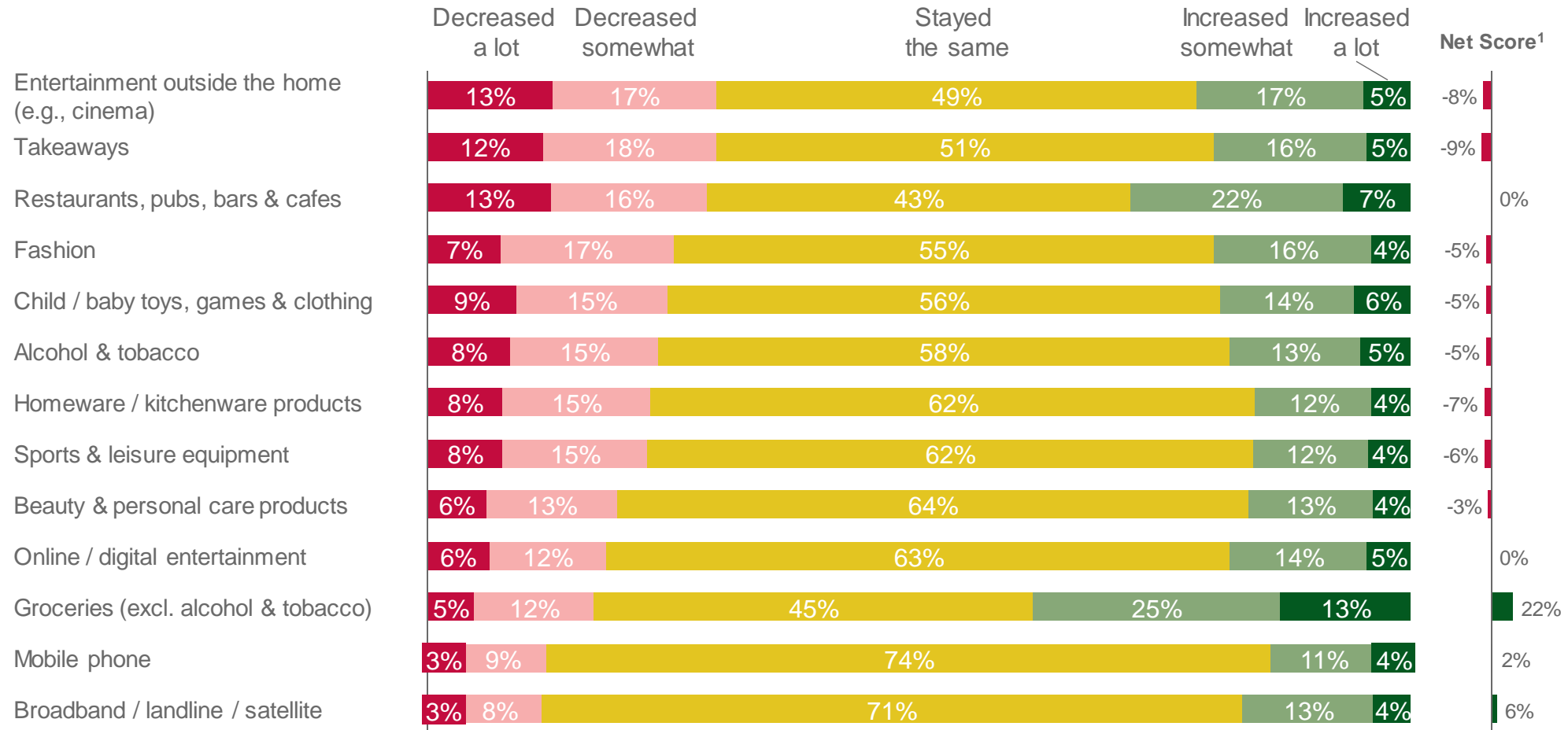


Note: October 2021 n = 573 - 1011, May 2022 n = 1652 - 2941, Question: 'Now thinking about specific issues you are facing on a personal level, how do you feel about the following?'; due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

Close to a third of consumers have reduced their spending on entertainment, takeaways and restaurants over the past 3 months, with a significant increase in spending on groceries

DUTCH RESPONDENTS' CHANGE IN SPENDING BY CATEGORY IN PAST 3 MONTHS, MAY 2022



Note: May 2022 n = 1754 - 2916, Question: 'How has your spending in the following areas changed in the past 3 months?'; 1. Net Score (%) = percentage of 'Increased a lot' and 'Increased somewhat' responses minus the percentage of 'Decreased somewhat' and 'Decreased a lot' responses; excludes those who answered 'I don't know / doesn't apply';

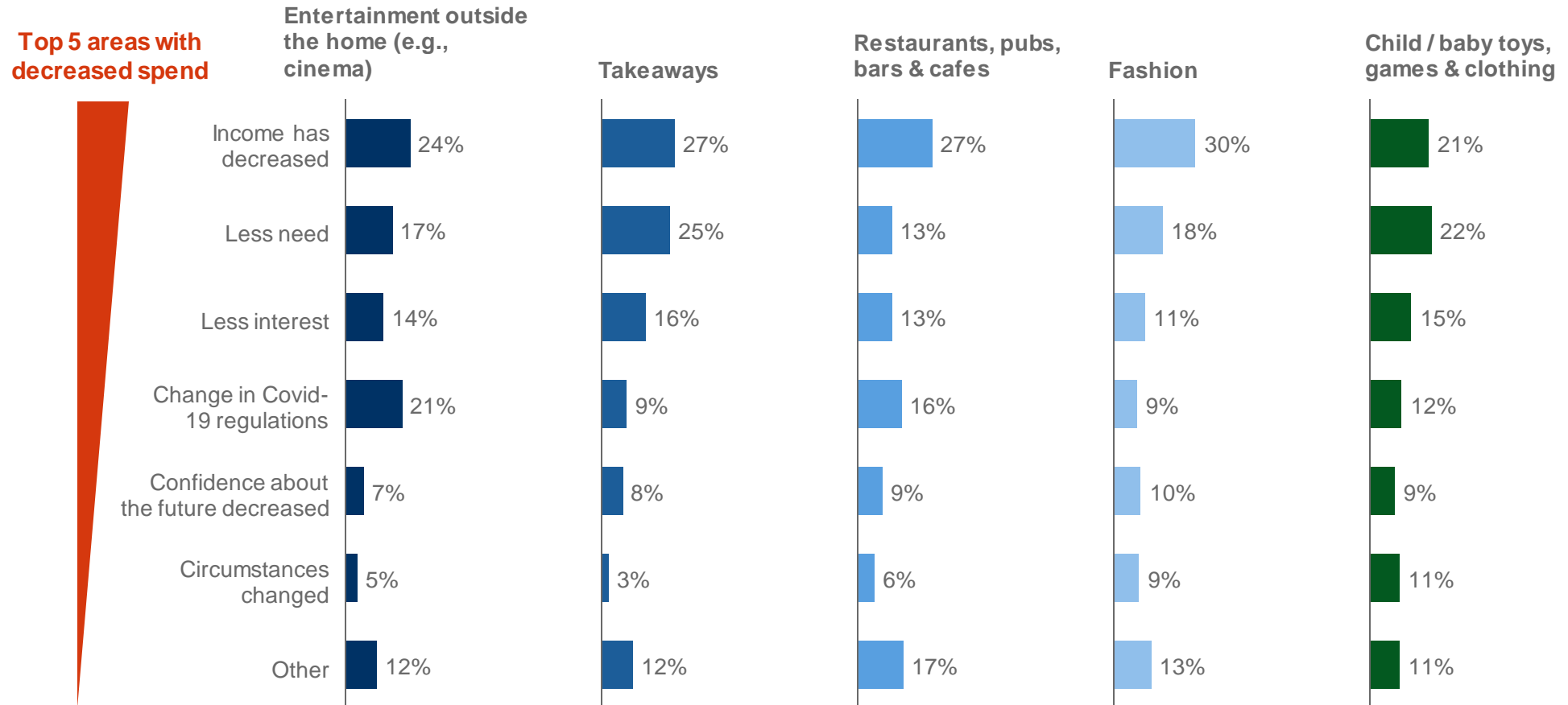
due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

7 Consumer sentiment survey: Netherlands

Declining incomes and less need / interest were typical drivers for consumers reducing spend in the last 3 months

REASONS FOR DECREASE IN SPEND FOR TOP 5 CATEGORIES WITH GREATEST DECREASE IN LAST 3 MONTHS, MAY 2022

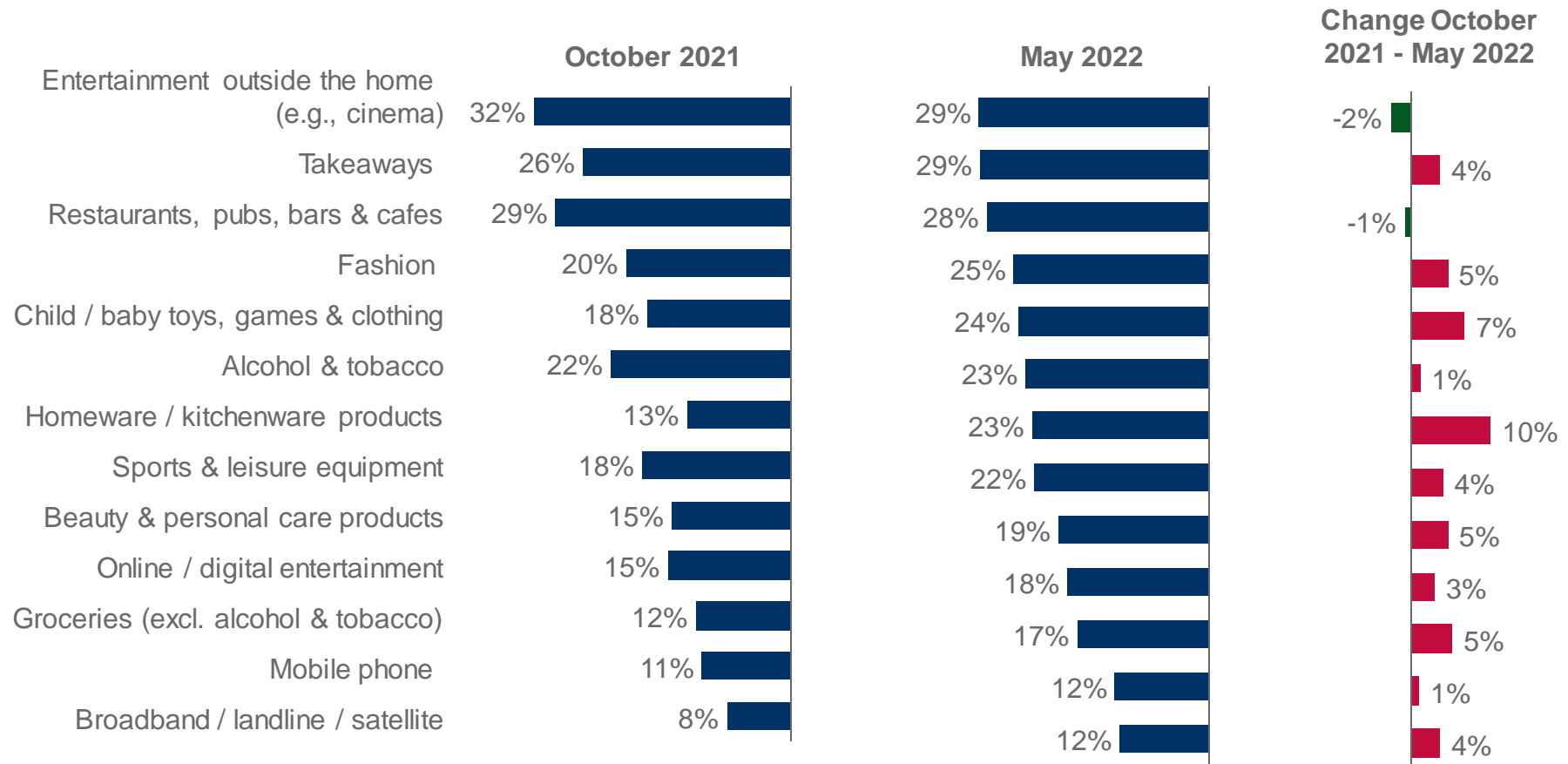


Note: May 2022 n = 113 - 179, Question: 'How has your spending in the following areas changed in the past 3 months?'; 'Why did you spend a lot less on this category?', excludes those who answered 'No specific reason', top 5 identified as those who responded 'Decreased a lot' and 'Decreased somewhat'; due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

This decreased spend represents a deepening of cutbacks; many consumers had already dropped their spend vs. previous 3 months in October 2021

SHARE OF RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE BY CATEGORY, OCTOBER 2021 & MAY 2022

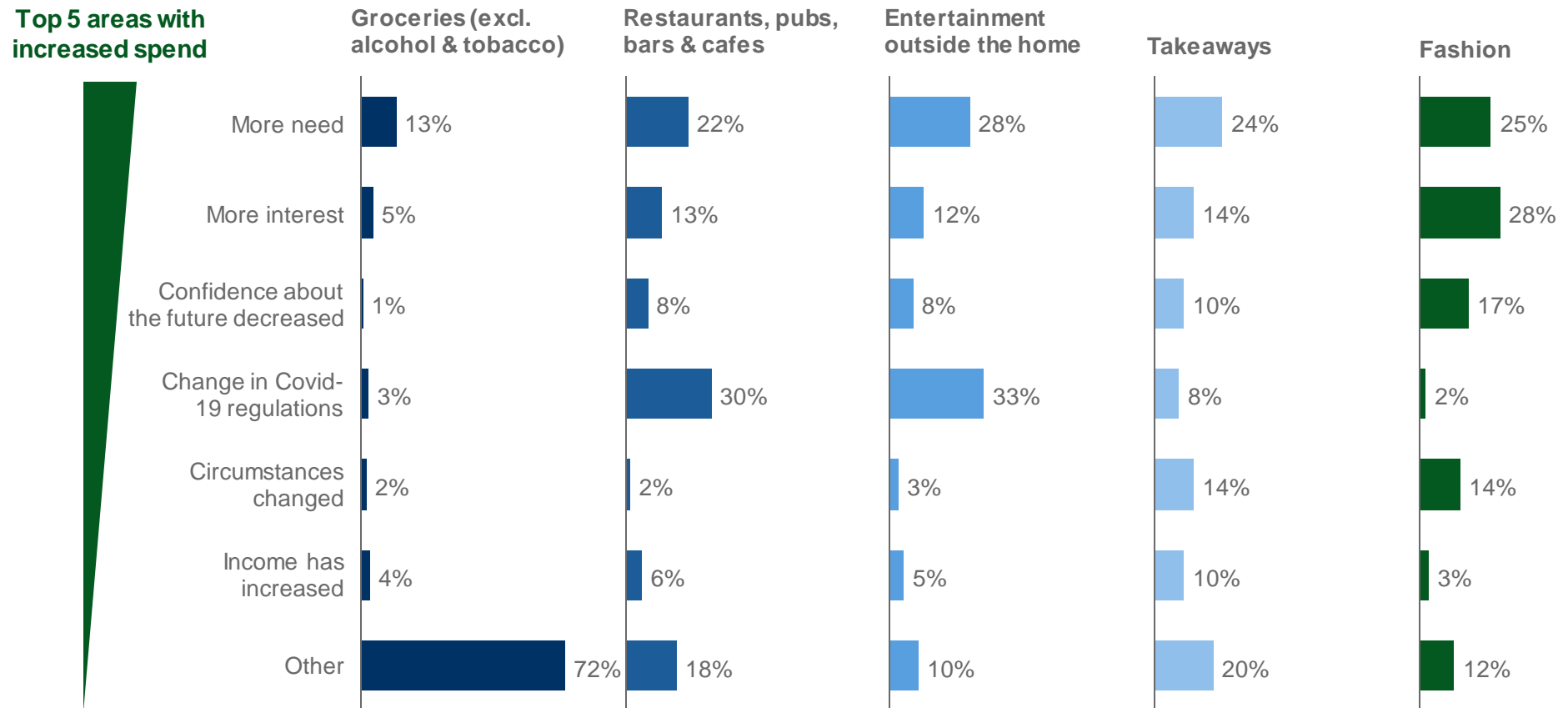


Note: October 2021 n = 642 - 999, May 2022 n = 1754 - 2916, Question: 'How has your spending in the following areas changed in the past 3 months?', excludes those who answered 'I don't know / doesn't apply', total for 'Decreased a lot' and 'Decreased somewhat' shown; due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

Typically, need and interest drove rises in consumer spending, with the exception of groceries, where inflation was the greatest driver

REASONS FOR INCREASE IN SPEND FOR TOP 5 CATEGORIES WITH GREATEST INCREASE IN LAST 3 MONTHS, MAY 2022



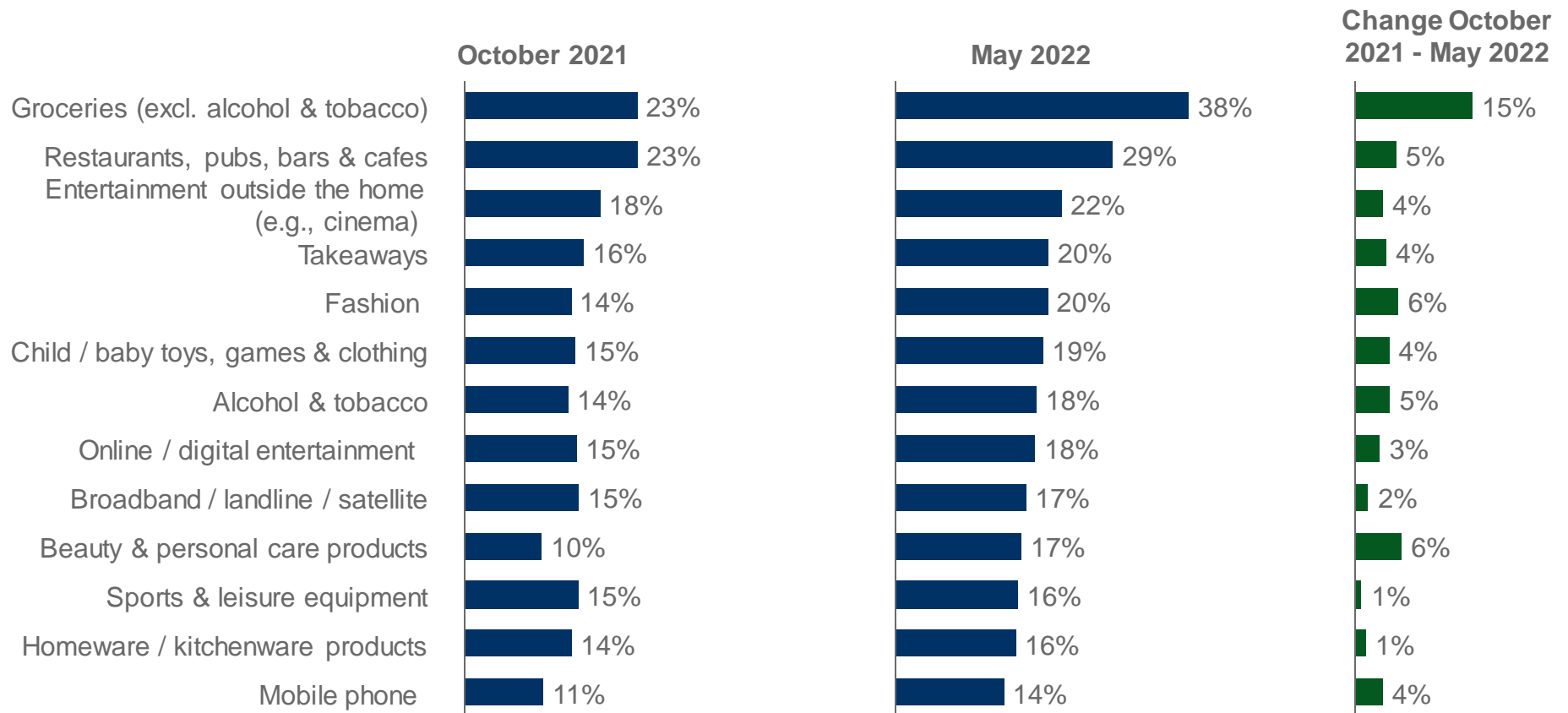
Note: May 2022 n = 59 - 250, Question: 'How has your spending in the following areas changed in the past 3 months?'; 'Why did you spend a lot more on this category?', excludes those who answered 'No specific reason', top 5 identified as those who responded 'Increased a lot' and 'Increased somewhat'; due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

10 Consumer sentiment survey: Netherlands

The proportion of consumers increasing their spending vs. the past 3 months has stayed flat in most categories since October 2021, with the exception of groceries due to rising inflation

SHARE OF RESPONDENTS WHO HAD INCREASED THEIR EXPENDITURE BY CATEGORY, OCTOBER 2021 & MAY 2022



Note: October 2021 n = 642 - 999, May 2022 n = 1754 - 2916, Question: 'How has your spending in the following areas changed in the past 3 months?', excludes those who answered 'I don't know / doesn't apply', total for 'Increased a lot' and 'Increased somewhat' shown; due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

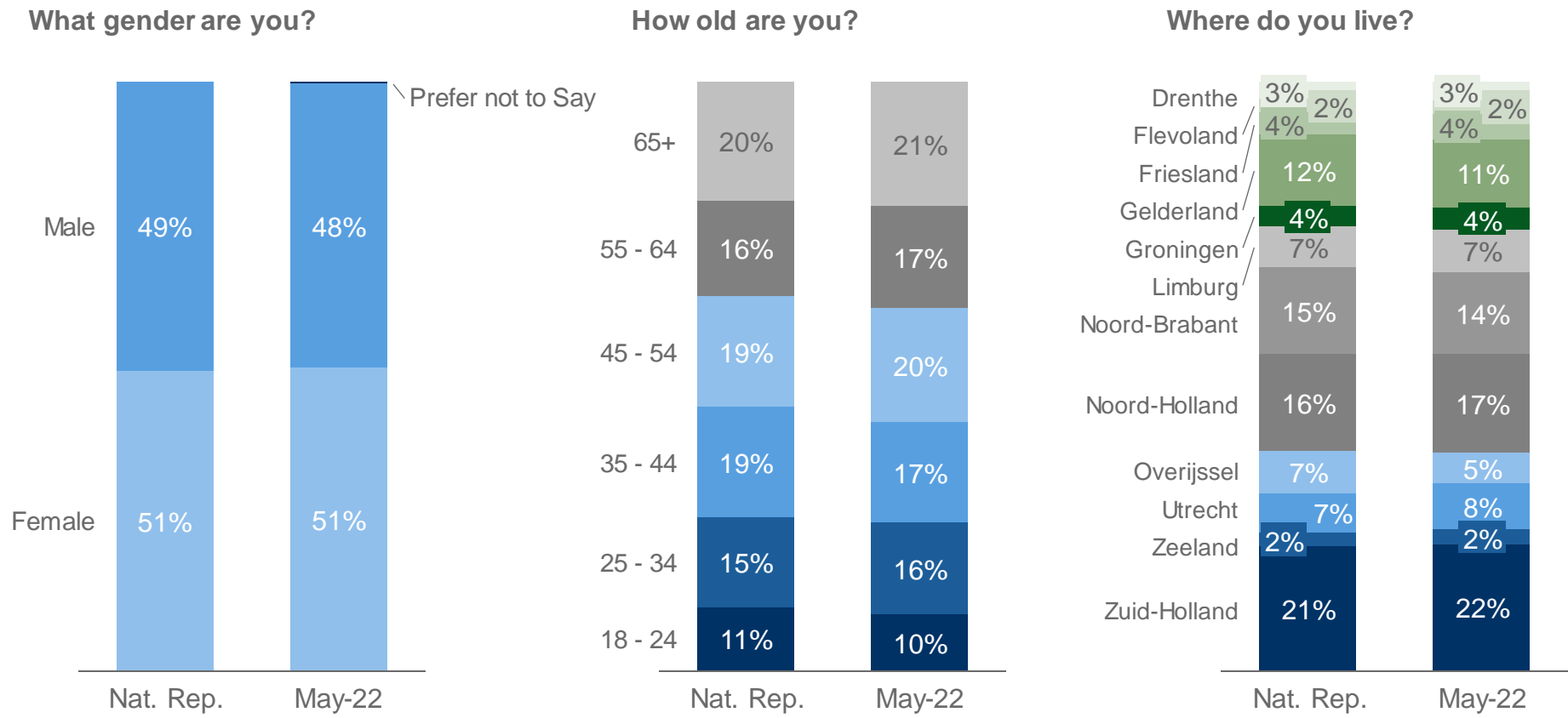
Contents



Sample demographics

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

KEY FACTS ABOUT THE NETHERLANDS SAMPLE



Note: Totals may not equal 100% due to rounding; n: 2957; Questions: 'What gender do you identify as?' / 'How old are you?' / 'Where do you live?'
Source: Eden McCallum & Dynata surveys