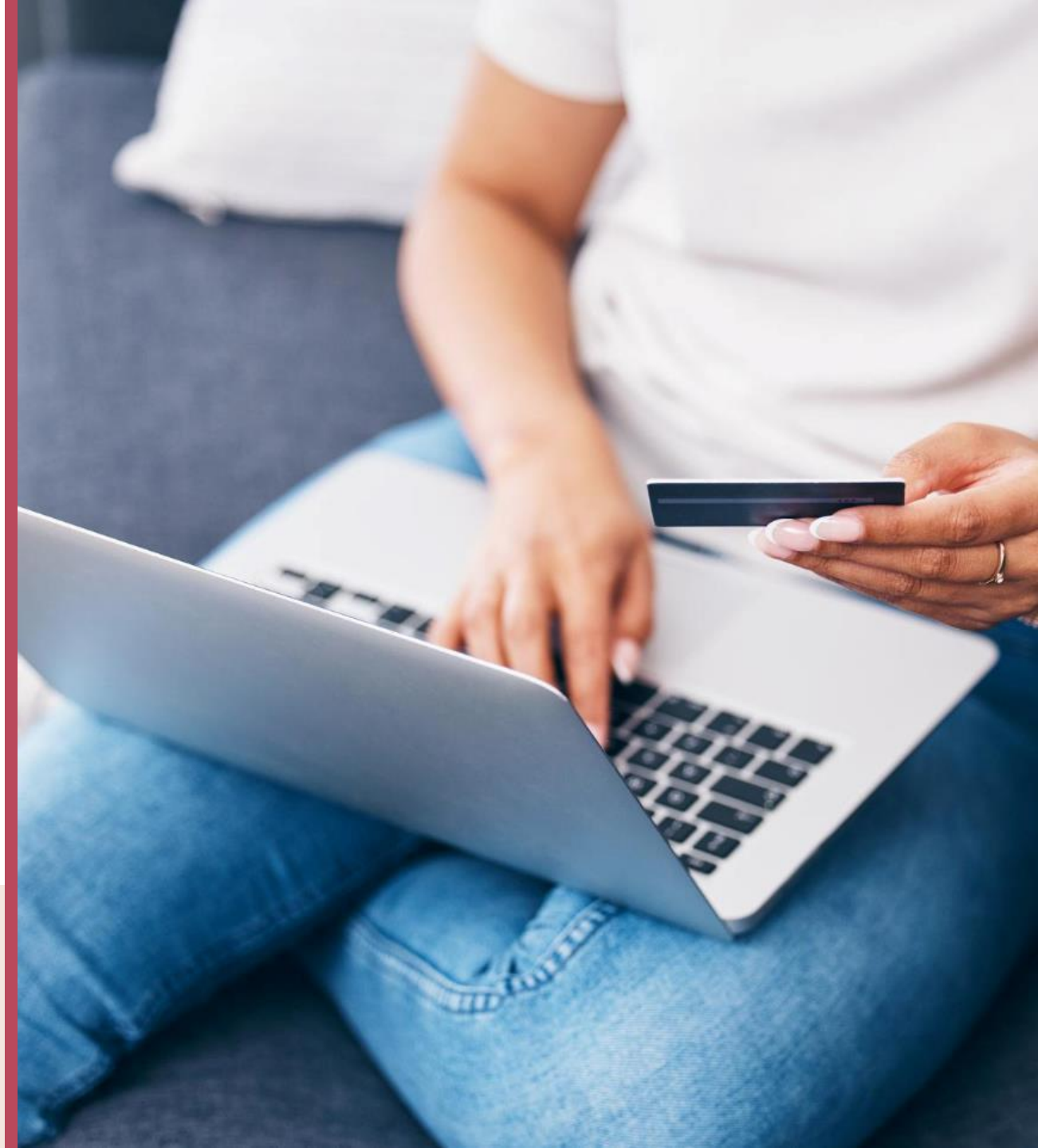


# Eden McCallum Consumer Survey

Q3 Consumer Sentiment:  
Netherlands

Published September 2024



# Contents

## Sentiment

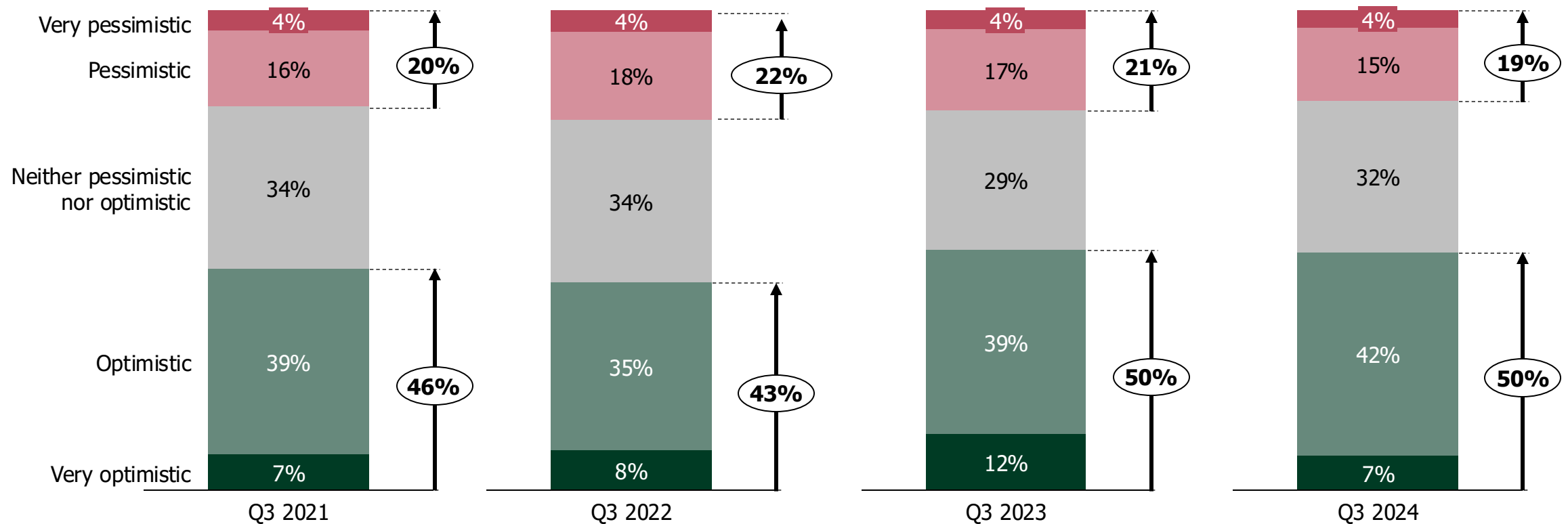
Spending

Sample details



# Overall, 50% of respondents are optimistic about the future, in line with last year; pessimism continues to reduce

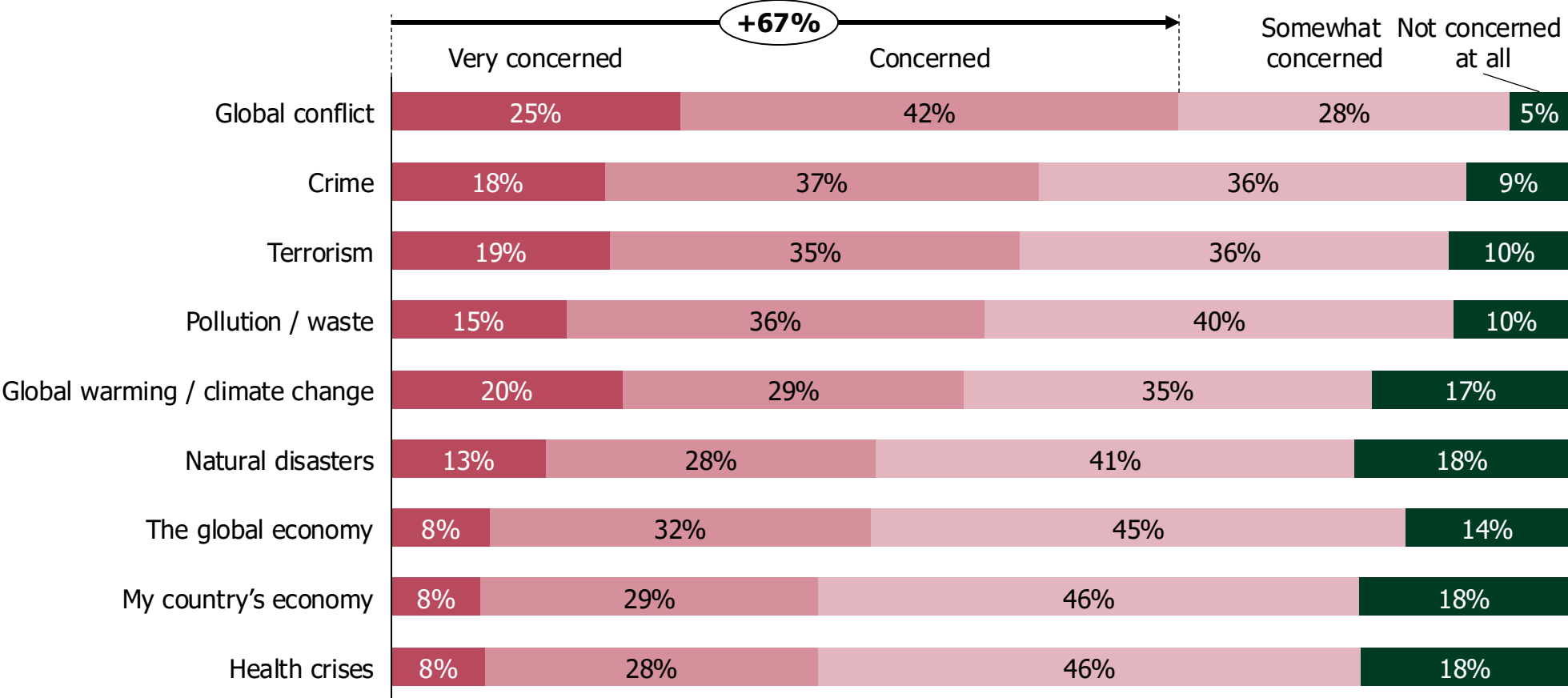
RESPONDENTS' VIEWS ON HOW THEY FEEL ABOUT THE FUTURE OVERALL, Q3 2021 – Q3 2024



Note: October 2021 n = 988, August 2022 n = 3136, July 2023 n = 1562; July 2024 n = 1978; 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

# Global conflict is the most widely shared national/international concern, followed by crime, terrorism and environmental issues

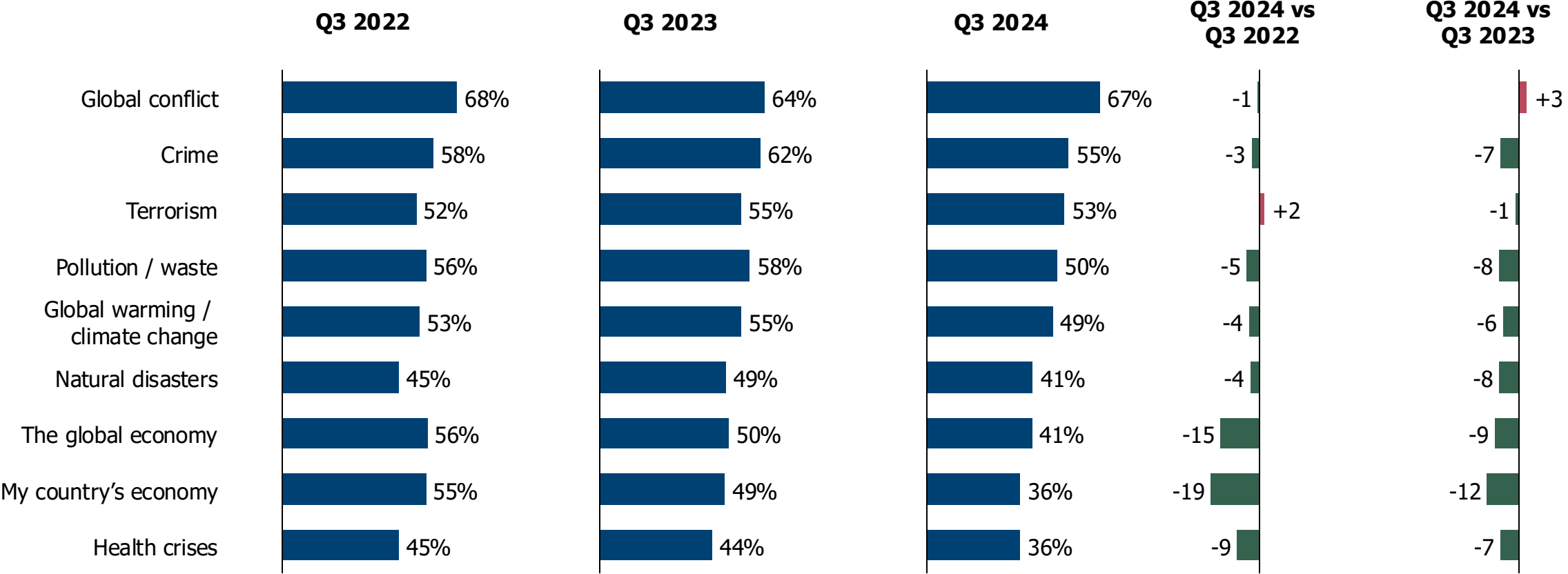
RESPONDENTS' VIEWS ON ISSUES FACING COUNTRY AND WORLD, Q3 2024



Note: July 2024 n = 1949-1988; 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

# Over time, with the exception of global conflict, concern about national and international issues continues to decrease

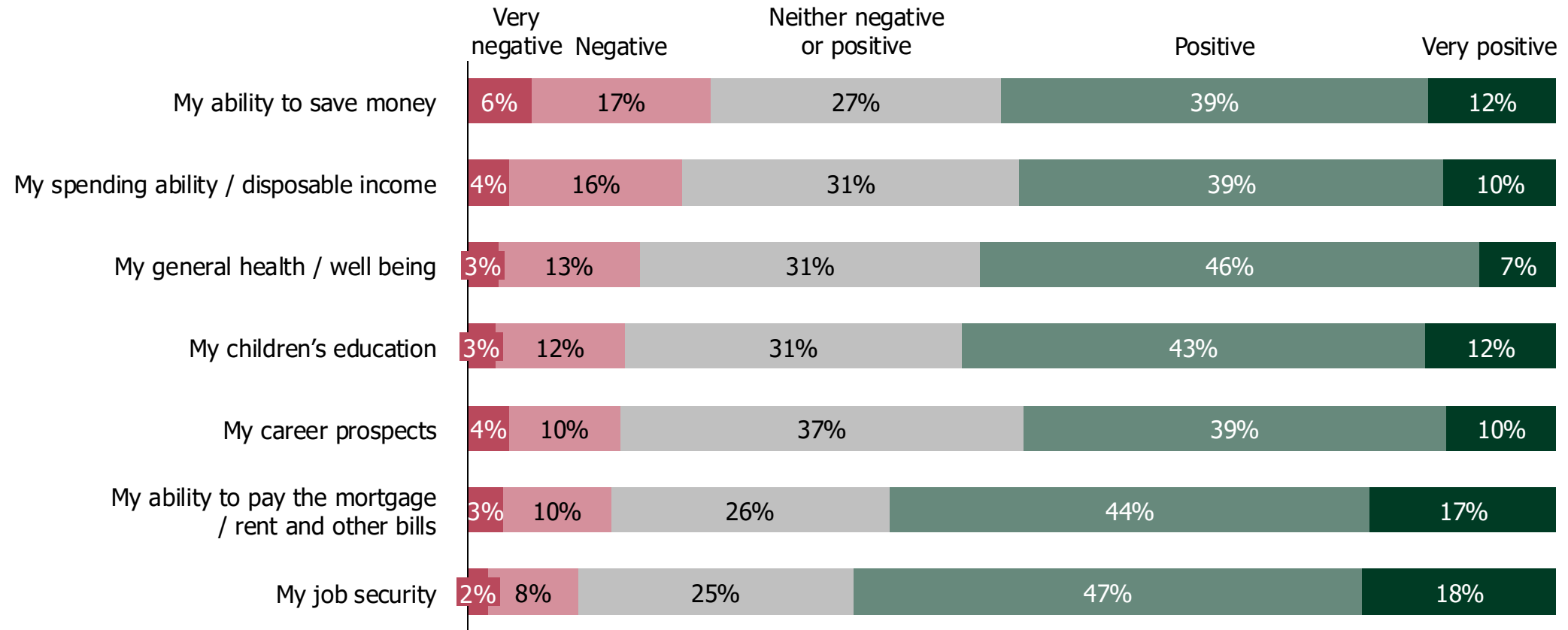
SHARE OF RESPONDENTS WHO WERE 'VERY CONCERNED' OR 'CONCERNED', Q3 2022 – 2024



Note: October 2022 n = 2667-2704, July 2023 n = 1553-1571, July 2024 n = 1949-1988; 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 personal issues, a majority hold positive views across the board; the ability to save and spend raises the widest negative sentiment

RESPONDENTS' VIEWS ON PERSONAL ISSUES FACED, Q3 2024

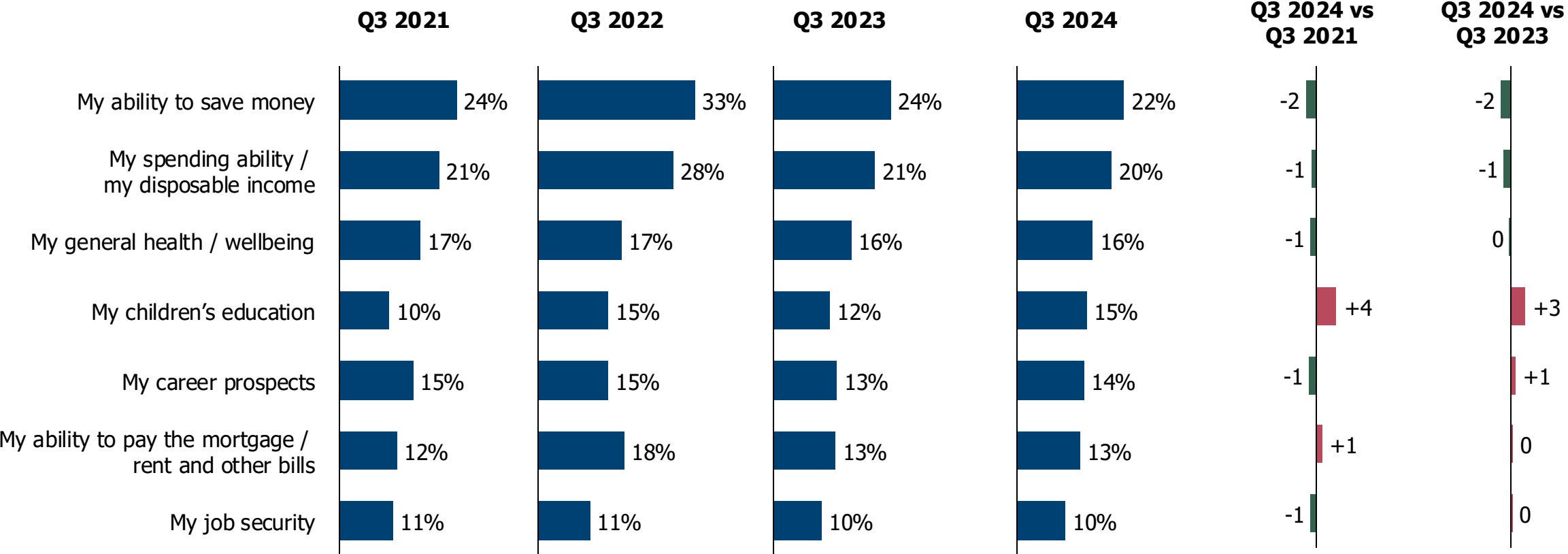


Note: July 2024 n = 1086-1996; Question: 'Now thinking about specific issues you are facing on a personal level, how do you feel about the following?'; excludes those who answered 'I don't know / doesn't apply'. Due to rounding percentages may not sum precisely

Source: Eden McCallum & Dynata surveys

# Over time, negative sentiment is reducing, though negativity around children's education widened somewhat year on year

SHARE OF RESPONDENTS WHO WERE 'VERY NEGATIVE' OR 'NEGATIVE', Q3 2021 – 2024



Note: August 2021, n = 1018, October 2022 n = 1437-2716, July 2023 n = 927-1584, July 2024 n = 1086-1996; Question: 'Now thinking about specific issues you are facing on a personal level, how do you feel about the following?'. Source: Eden McCallum & Dynata surveys

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Sentiment

**Spending**

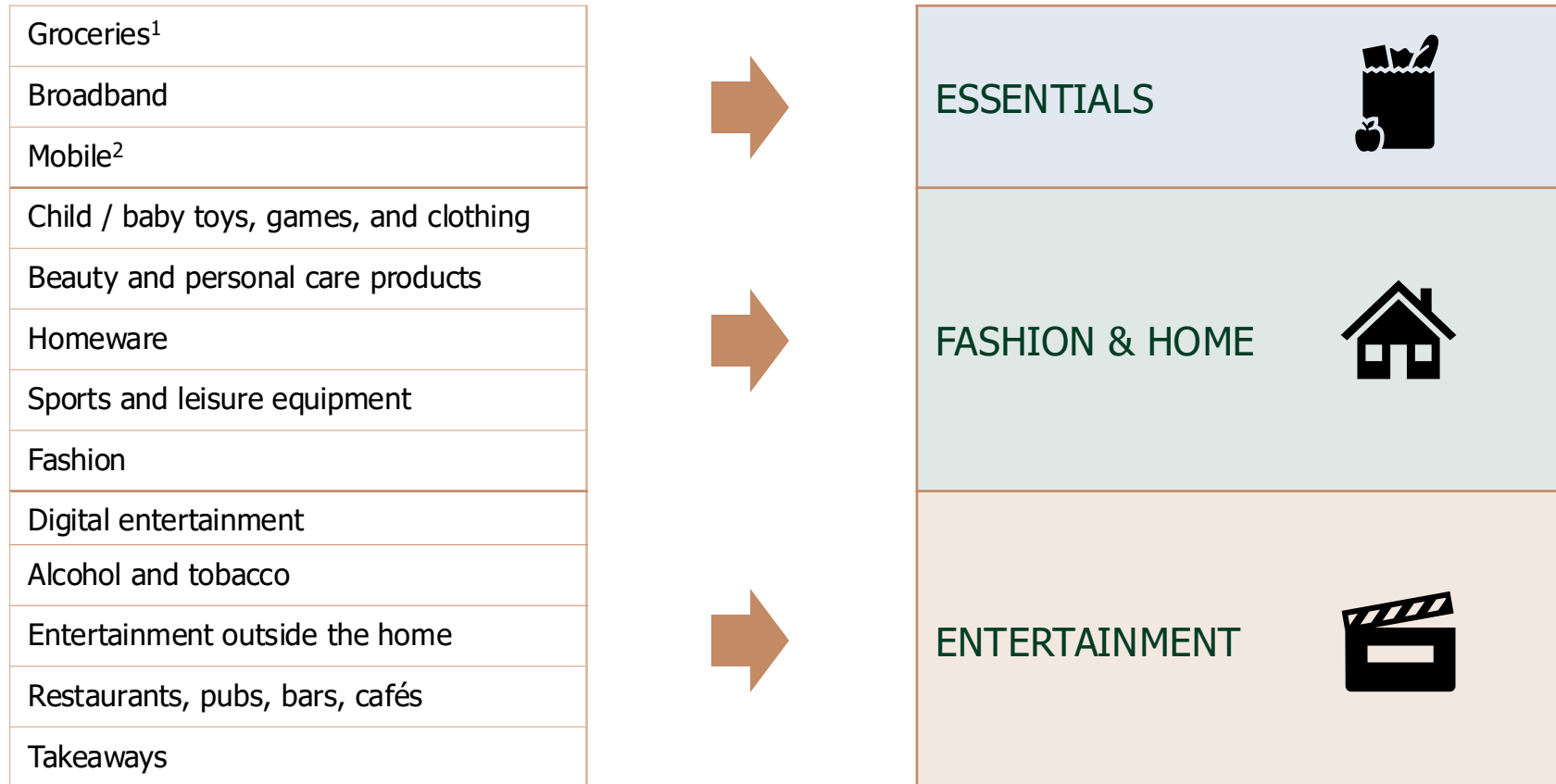
Sample details





# Respondents were asked about changes in spend over the past 3 months in 13 categories, which we have grouped as follows

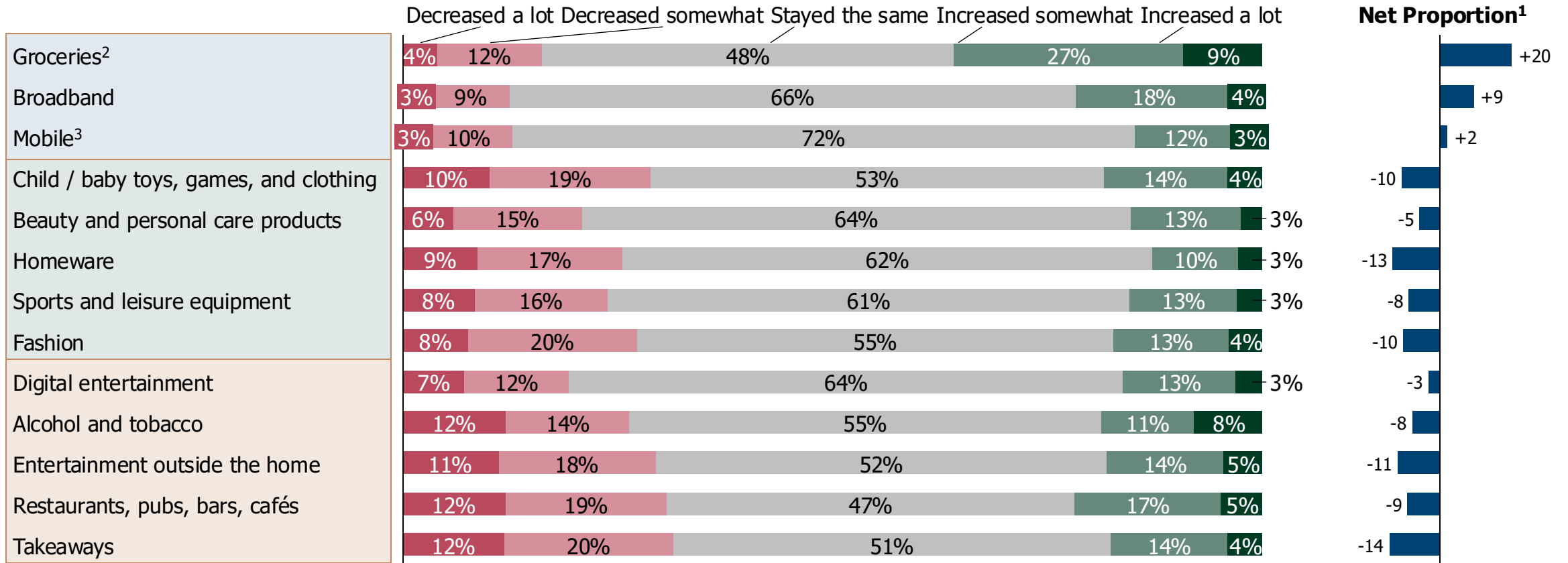
## GROUPING OF SPEND CATEGORIES



(1) Excludes Alcohol and tobacco; (2) Includes Mobile data

# Consumers increasing their spend outnumbered those reducing it in Essentials, particularly Grocery; across discretionary categories more respondents reduced their spend than increased it

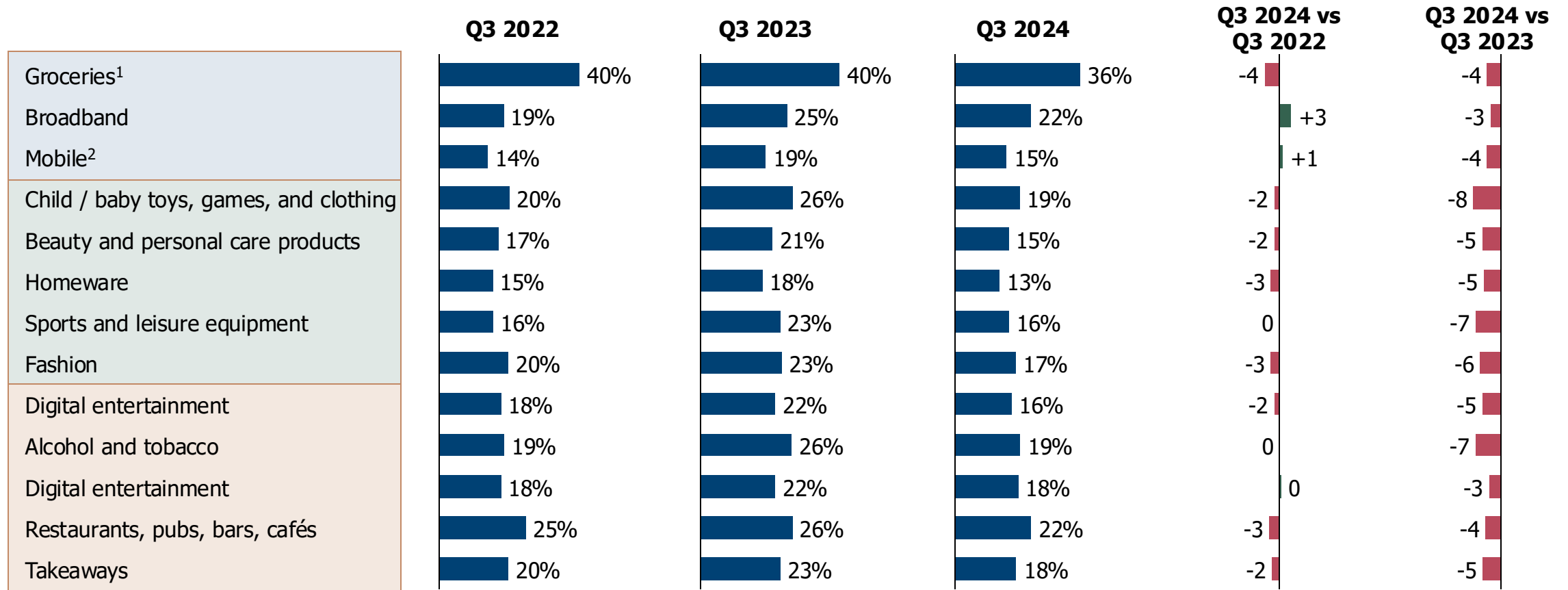
% OF CONSUMERS REPORTING CHANGE IN SPEND OVER PAST 3 MONTHS, BY SUBCATEGORY, Q3 2024



Note: July 2024 n = 1124-1982; Question: 'How has your spending in the following areas changed in the past 3 months?'; (1) Net Proportion = 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'; (2) Excludes Alcohol and tobacco, (3) Includes Mobile data. Due to rounding percentages may not sum precisely  
Source: Eden McCallum & Dynata surveys

# Over time, the share of respondents who increased their spend is down year on year across all categories

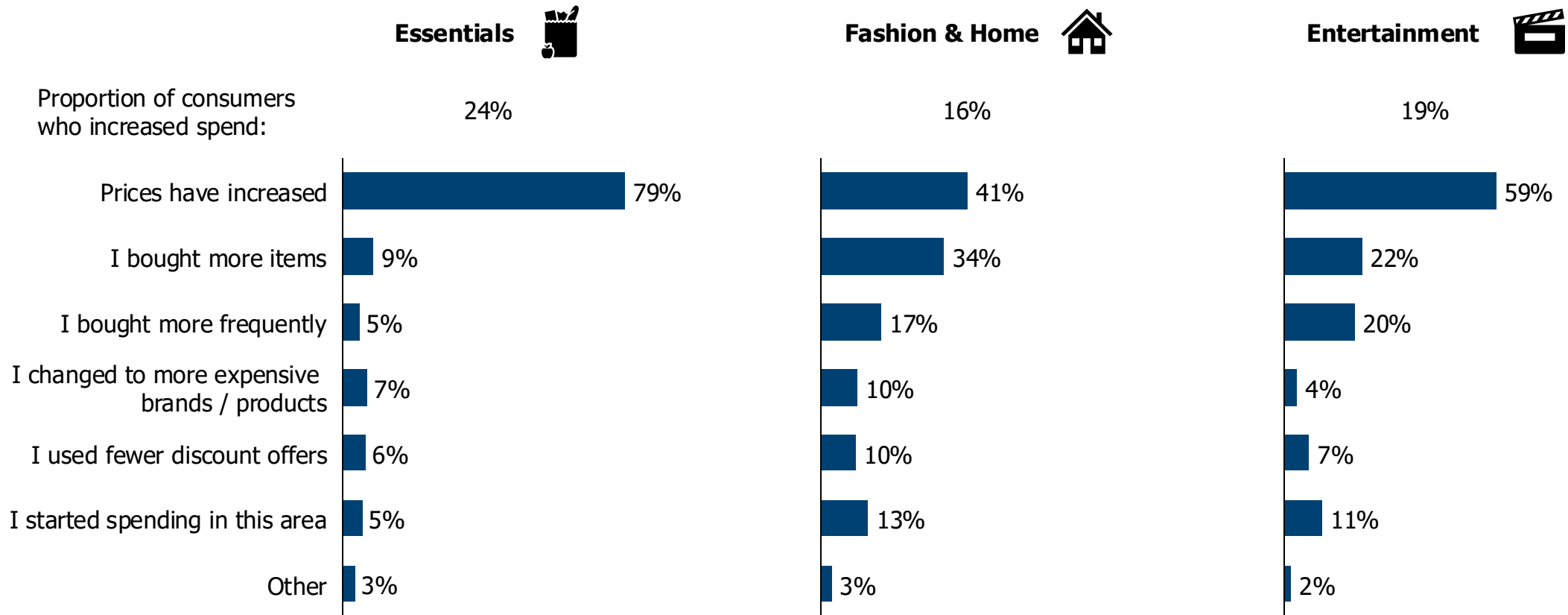
% OF RESPONDENTS WHO HAD INCREASED THEIR SPEND BY CATEGORY, Q3 2022 – 2024



Note: August 2022 n = 1875-3148, July 2023 n = 982-1573, July 2024 n = 1124-1982; 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'; (1) Excludes Alcohol and tobacco (2) Includes Mobile data. Due to rounding percentages may not sum precisely  
Source: Eden McCallum & Dynata surveys

# In Essentials, most of those who increased spending attributed that to higher prices. In discretionary categories there was more of a mix between price and higher consumption

WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, AVERAGE OF CATEGORIES, Q3 2024

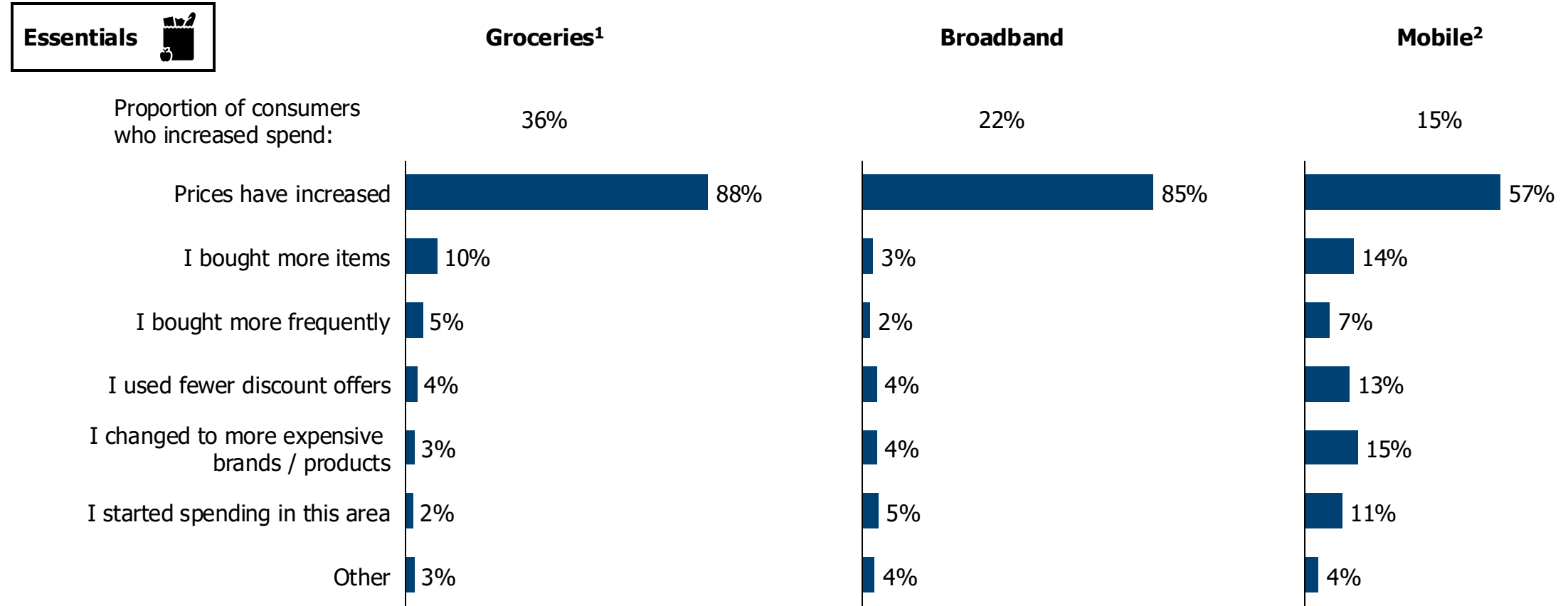


Note: July 2024 n = 101-258; Question: 'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend more on this category?'; includes those who answered 'Increased a lot' and 'Increased somewhat'.

Source: Eden McCallum & Dynata surveys

# Within Essentials, price was the predominant factor in increased spend across the subcategories

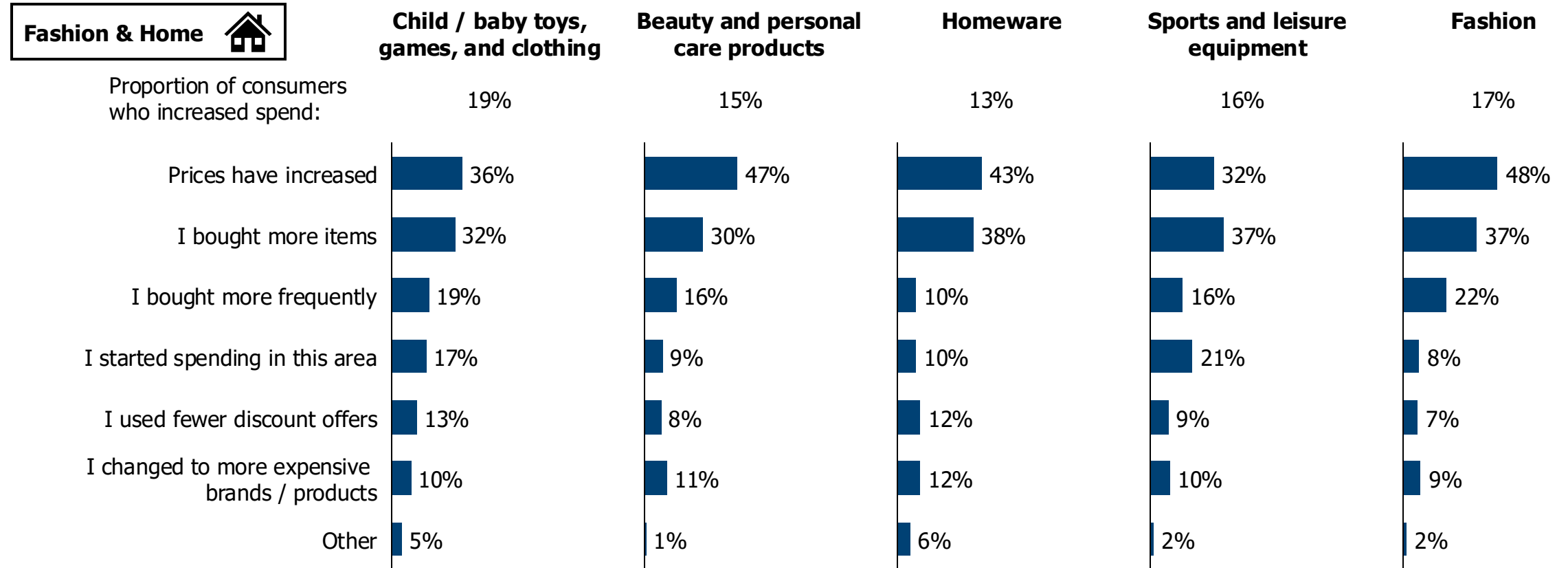
## WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, Q3 2024



Note: July 2024 n = 192-258; Question: 'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend more on this category?'; includes those who answered 'Increased a lot' and 'Increased somewhat'; (1) Excludes Alcohol and tobacco (2) Includes Mobile data  
Source: Eden McCallum & Dynata surveys

# Within Fashion & Home, consumption as well as price drove increased spend, including a significant amount of 'trading up'

## WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, Q3 2024

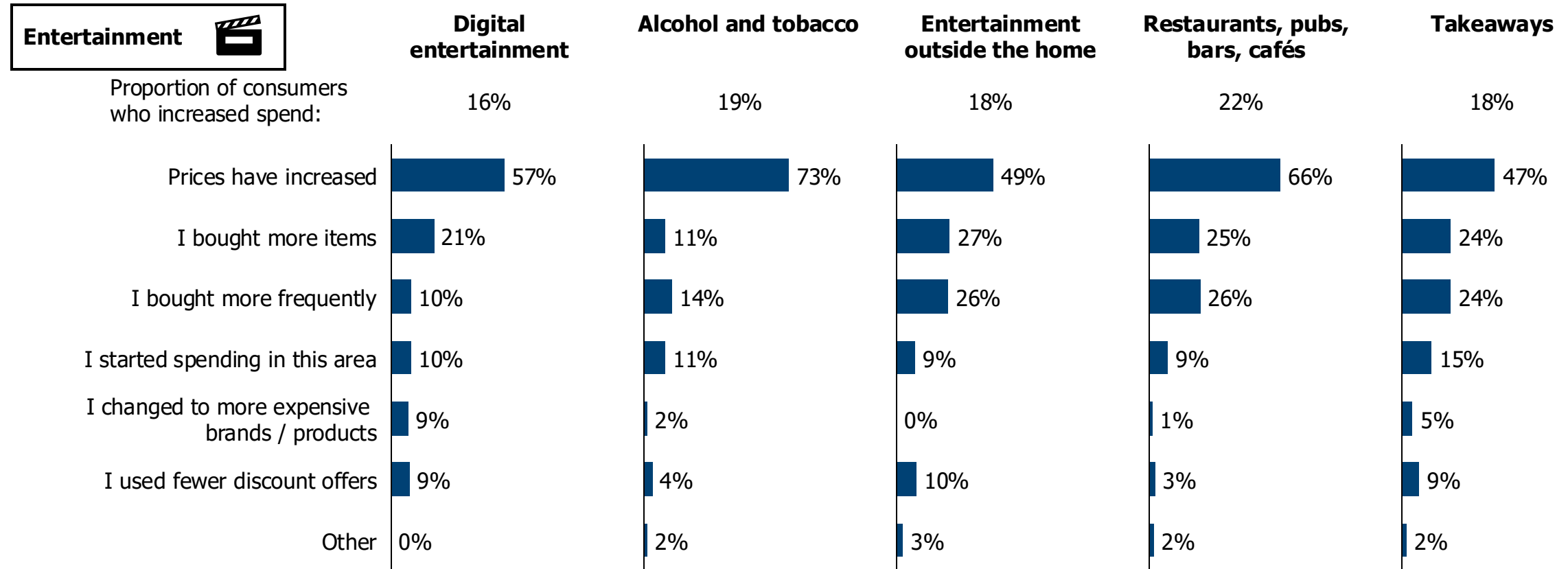


Note: July 2024 n = 101-140; Question: 'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend less on this category?', includes those who answered 'Increased a lot' and 'Increased somewhat'.

Source: Eden McCallum & Dynata surveys

# Within Entertainment, while price was the leading reason for increased spend, consumption rose for a significant proportion of respondents, notably in out of home Entertainment / food and drink, and in Takeaways

WAYS IN WHICH RESPONDENTS SPENT MORE BY CATEGORY IN LAST 3 MONTHS, Q3 2024

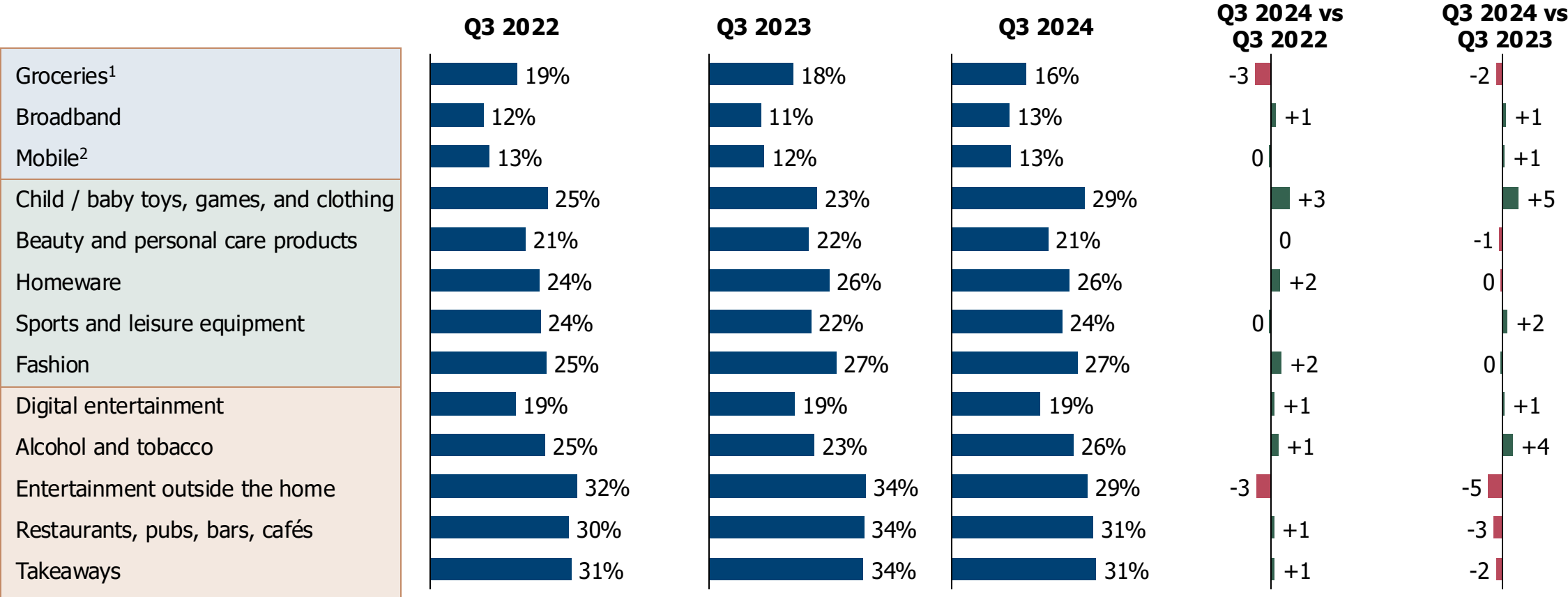


Note: July 2024 n = 106-163; Question: 'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend more on this category?'; includes those who answered 'Increased a lot' and 'Increased somewhat'.

Source: Eden McCallum & Dynata surveys

# Over time, the proportion who **decreased spending** has been fairly stable across categories. Year on year, more reduced their spend on Children's items and Alcohol/tobacco, and fewer on going out and takeaways.

% OF RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE BY CATEGORY, Q3 2022 – 2024

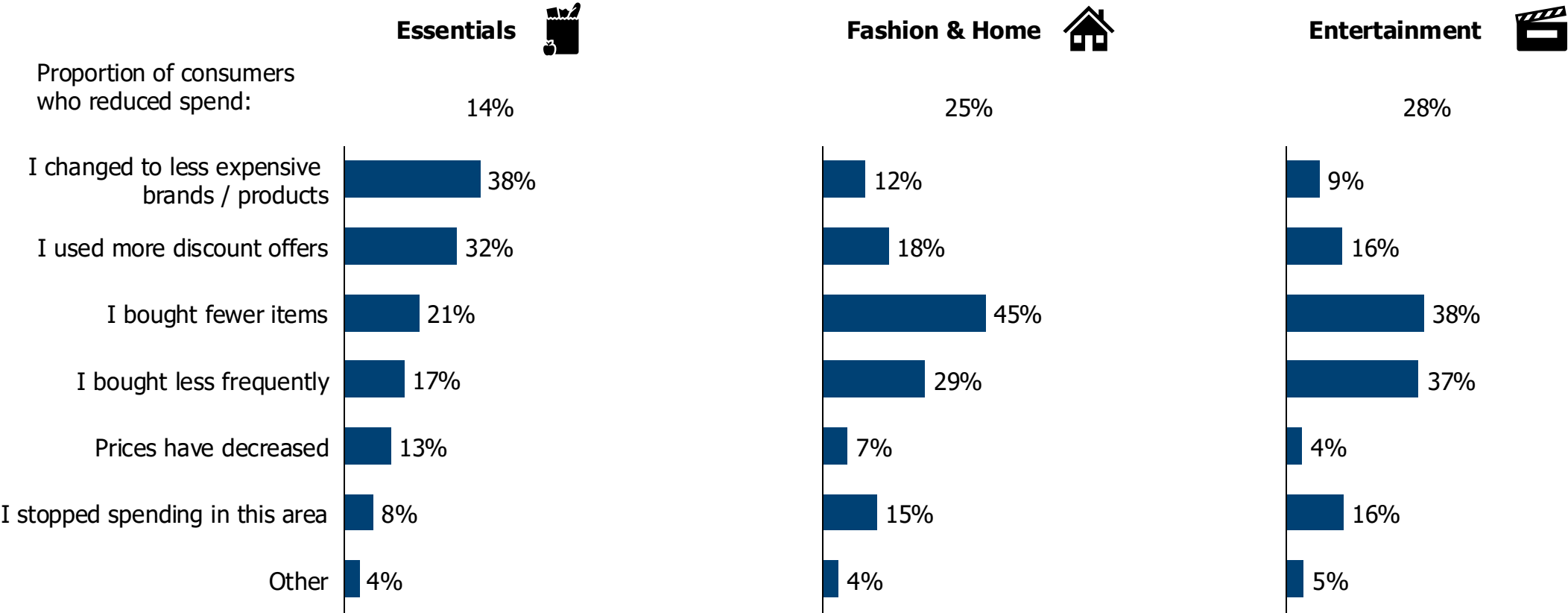


Note: August 2022 n = 187-3148, July 2023 n = 982-1573; July 2024 n = 1124-1982; Question: 'How has your spending in the following areas changed in the past 3 months?'; excludes those who answered 'I don't know / doesn't apply'; (1) Excludes Alcohol and tobacco (2) Includes Mobile data. Due to rounding percentages may not sum precisely  
Source: Eden McCallum & Dynata surveys



# Decreased spend in Essentials was primarily due to trading down and using discounts. In discretionary categories reduced consumption was the predominant lever

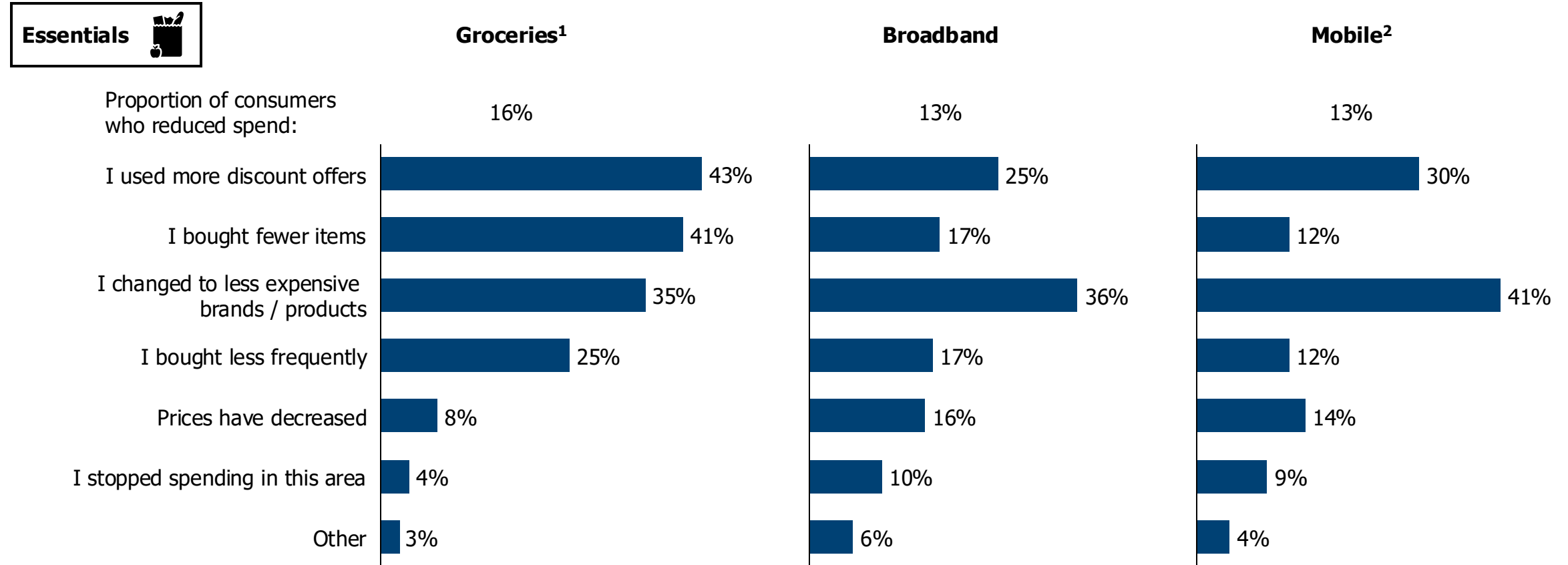
WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, AVERAGE OF CATEGORIES, Q3 2024



Note: July 2024 n = 83-239, Question: 'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend less on this category?'; includes those who answered 'Decreased a lot' and 'Decreased somewhat'.  
Source: Eden McCallum & Dynata surveys

# Within Essentials categories, trading down was the primary lever for those **reducing** spend in Telecoms; in Grocery, customers primarily used discount offers

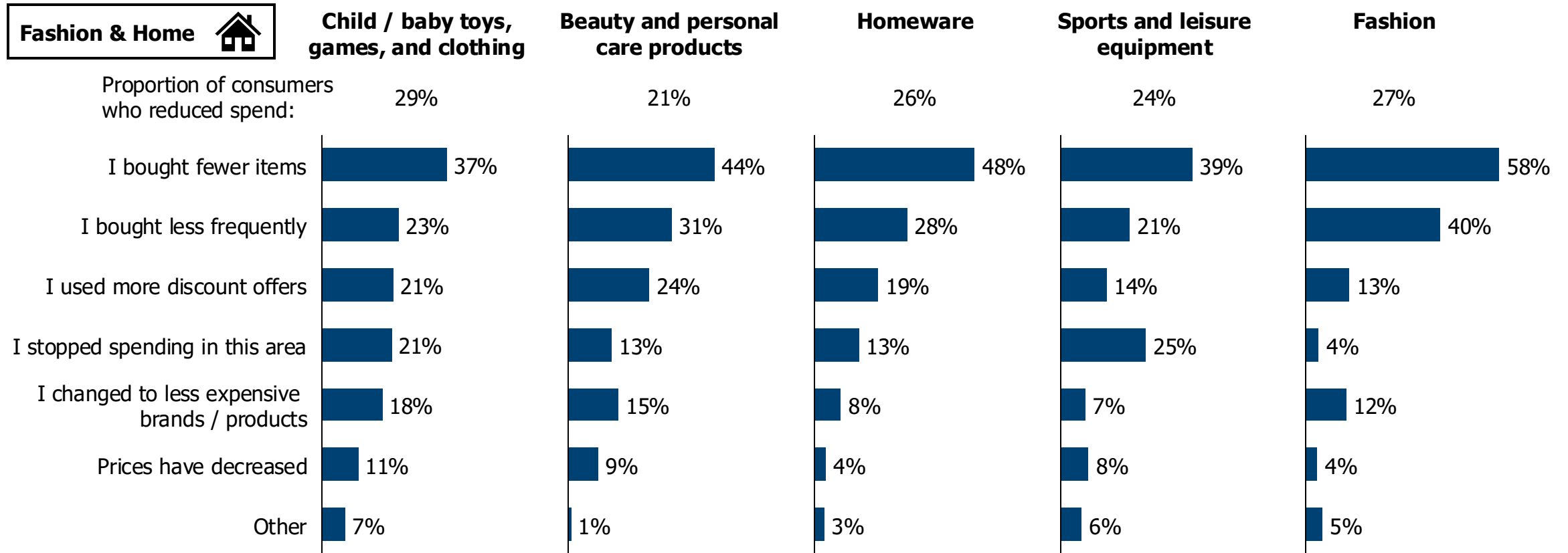
WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, Q3 2024



Note: July 2024 n = 83-149; Question: 'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend less on this category?'; includes those who answered 'Decreased a lot' and 'Decreased somewhat'; (1) Excludes Alcohol and tobacco (2) Includes Mobile data  
Source: Eden McCallum & Dynata surveys

# Across Fashion & Home buying less – or nothing – was the main lever to **reducing** spend; in sports and leisure ~1/4 of those who spent less cut all their spending on the category, and in Children's items ~1/5

WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, Q3 2024

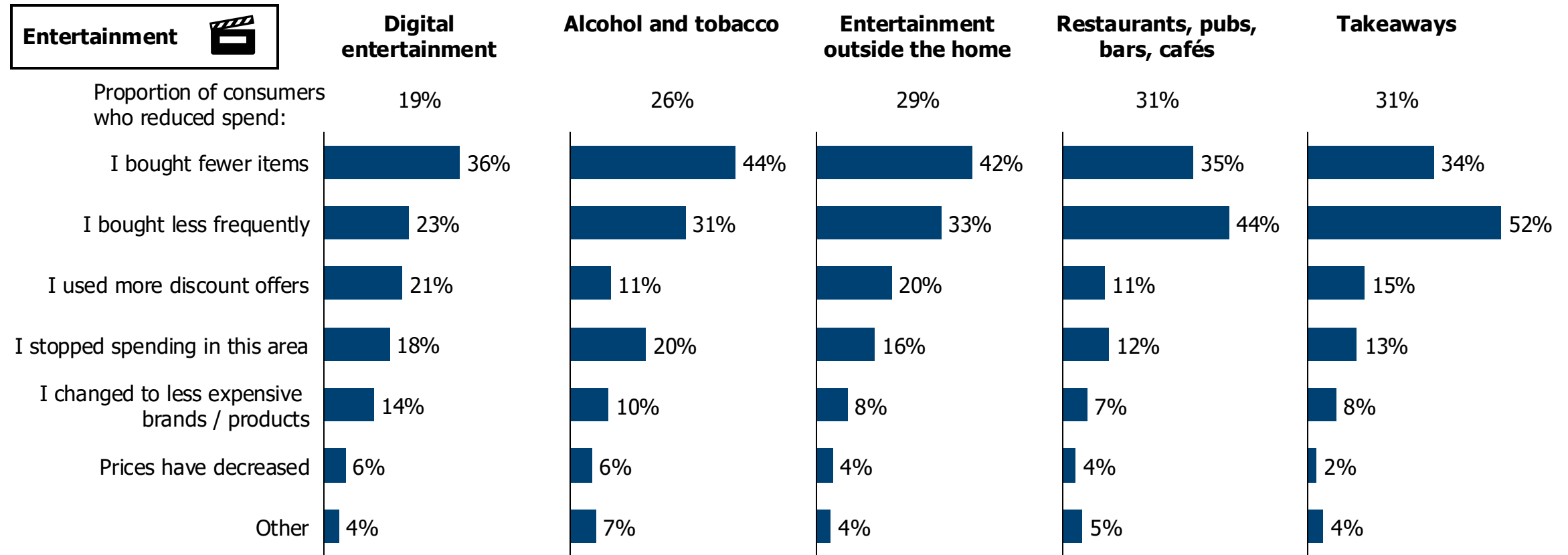


Note: July 2024 n = 200-239; Question: 'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend less on this category?', includes those who answered 'Decreased a lot' and 'Decreased somewhat'.

Source: Eden McCallum & Dynata surveys

# Similarly, within Entertainment, buying less - or zero - was the main lever to **reducing** spend across all subcategories; ~1/5 of those who reduced spend cut all spending on Alcohol/tobacco and Digital entertainment

WAYS IN WHICH RESPONDENTS SPENT LESS BY CATEGORY IN LAST 3 MONTHS, Q3 2024



Note: July 2024 n = 178-235; Question: 'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend less on this category?', includes those who answered 'Decreased a lot' and 'Decreased somewhat'.

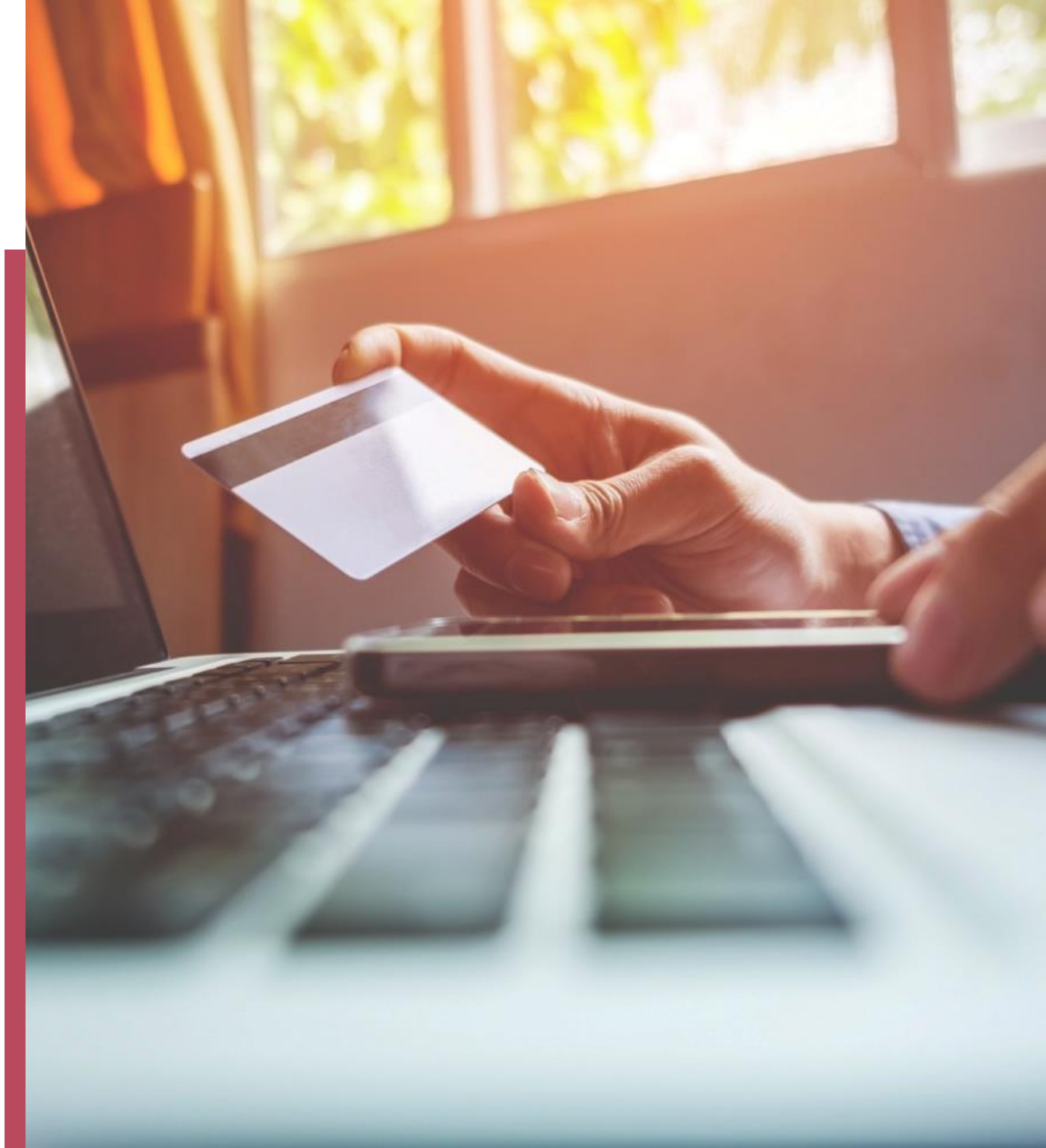
Source: Eden McCallum & Dynata surveys

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Sentiment

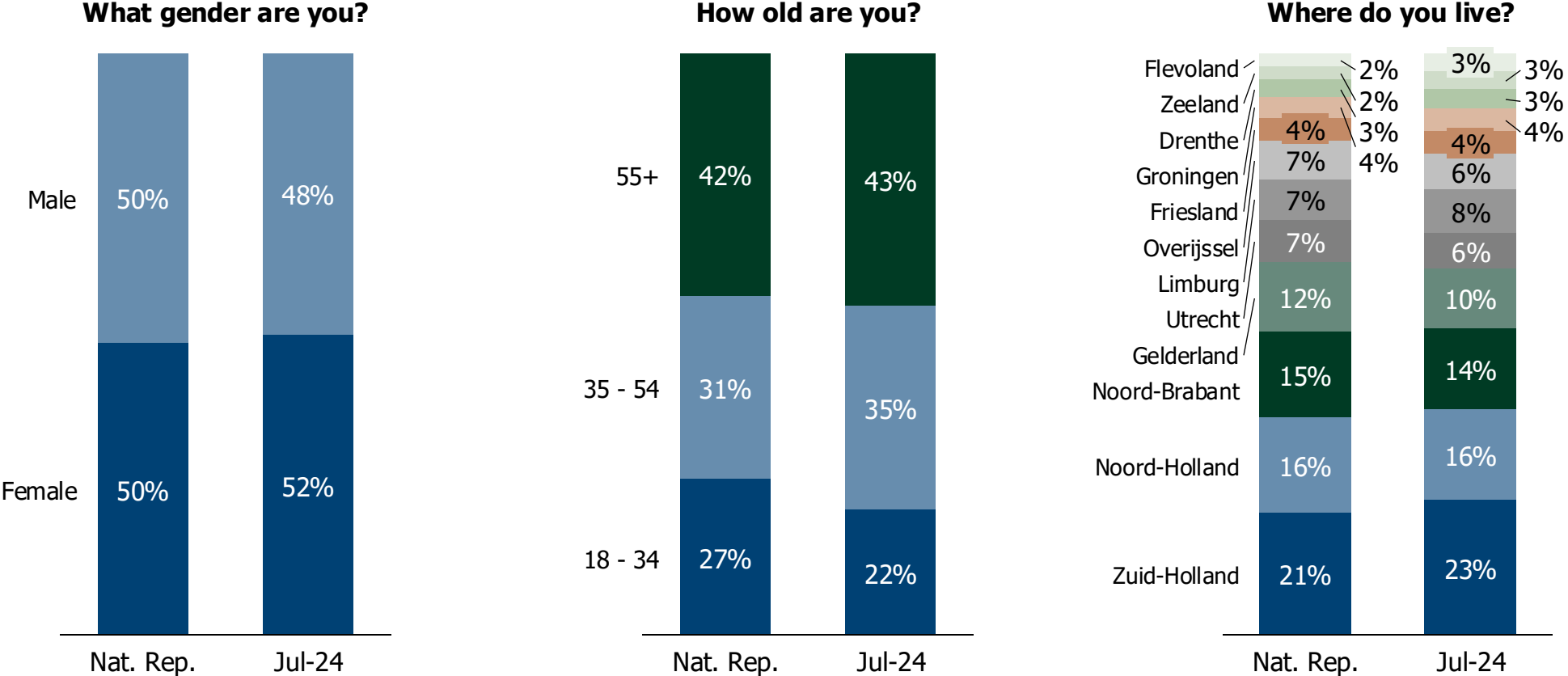
Spending

**Sample details**



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

## APPENDIX: DETAILS OF SAMPLE SURVEY RESPONDENTS, 2024



Note: Totals may not equal 100% due to rounding; n = 1,990 to 2,005; Questions: 'What gender do you identify as?' / 'How old are you?' / 'Where do you live?'; excludes "Other" and "Prefer not to say"  
 Source: Eden McCallum & Dynata surveys, National Statistics Office