Eden McCallum Consumer Survey

Q3 Consumer Sentiment: Netherlands

Published September 2024

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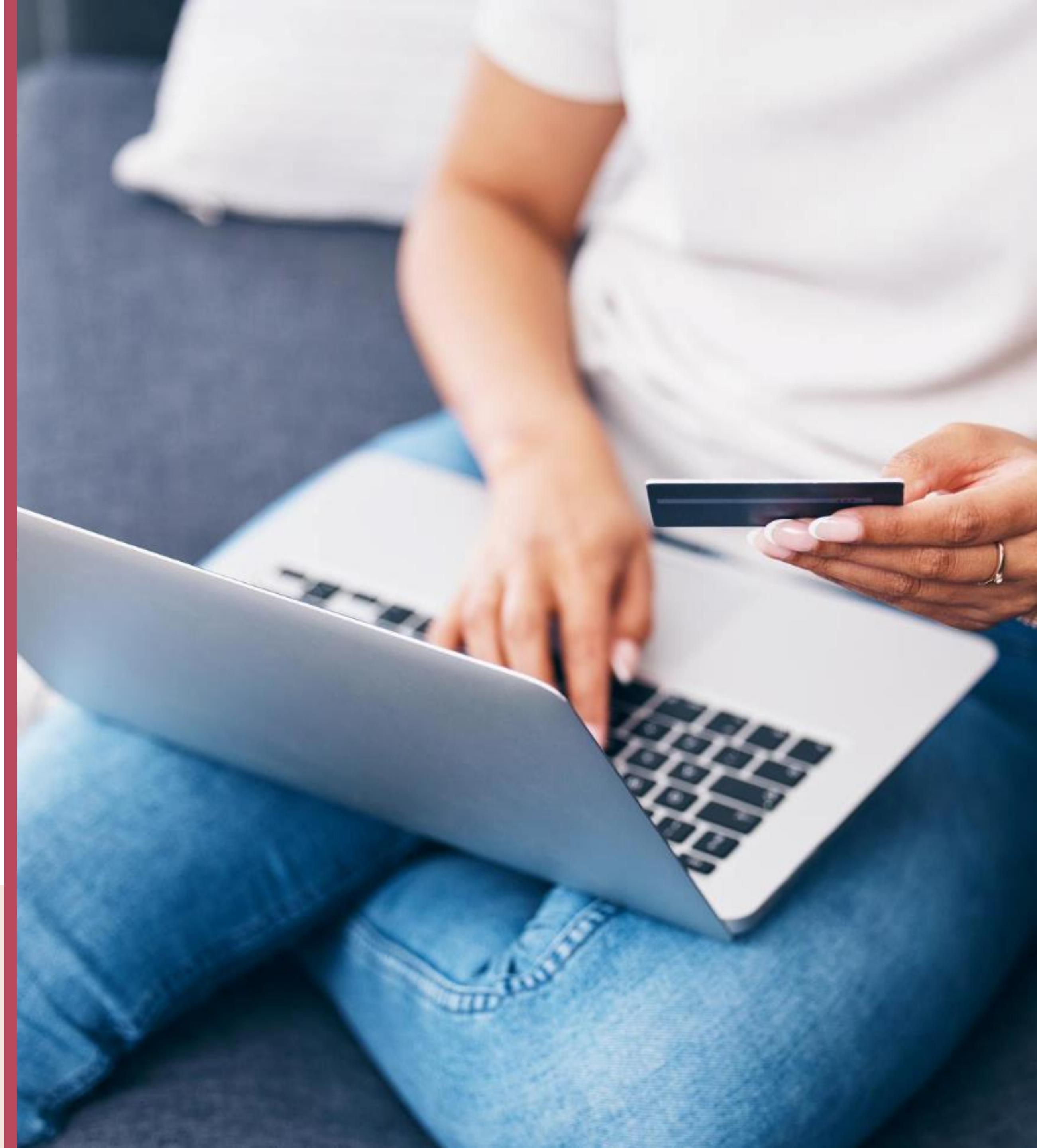

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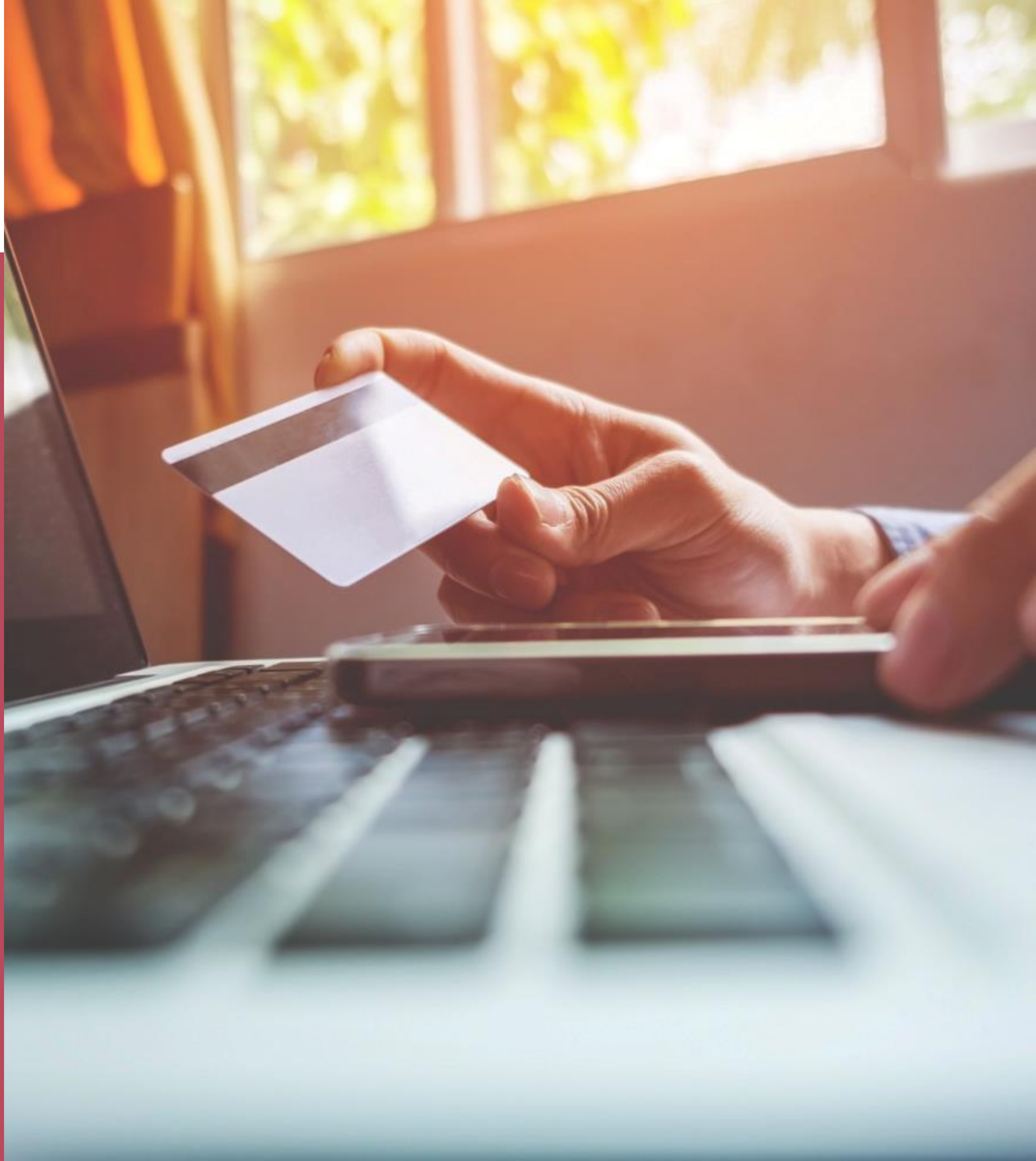

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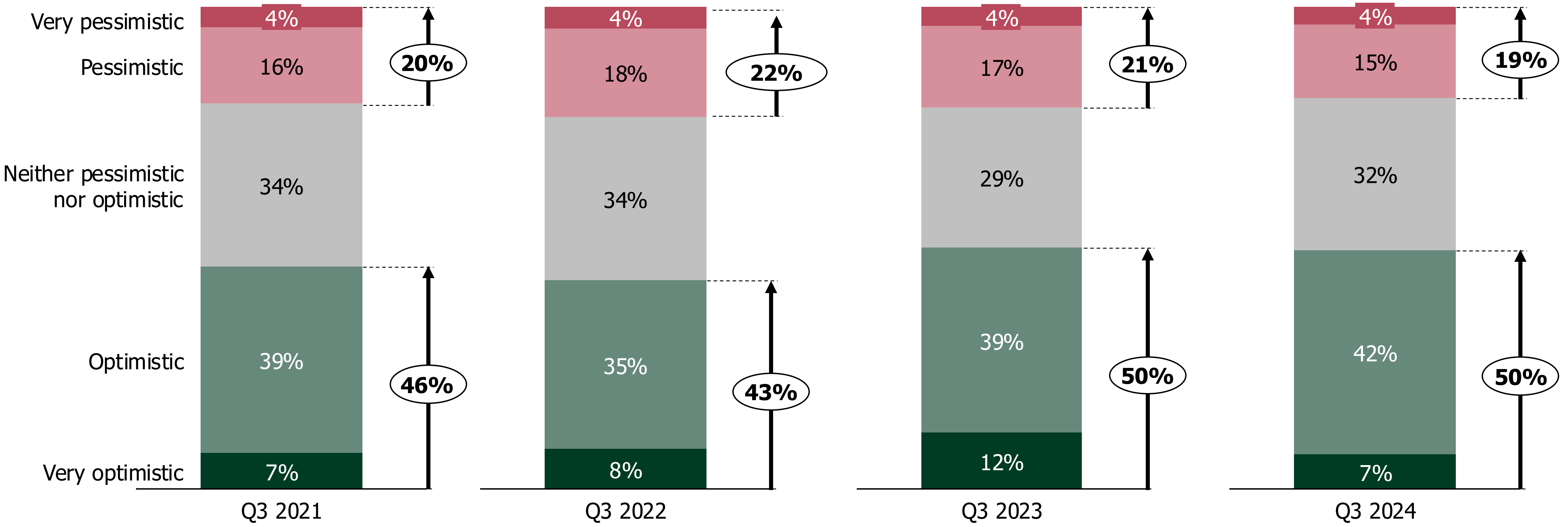
Overall, 50% of respondents are optimistic about the future, in line with last year; pessimism continues to reduce

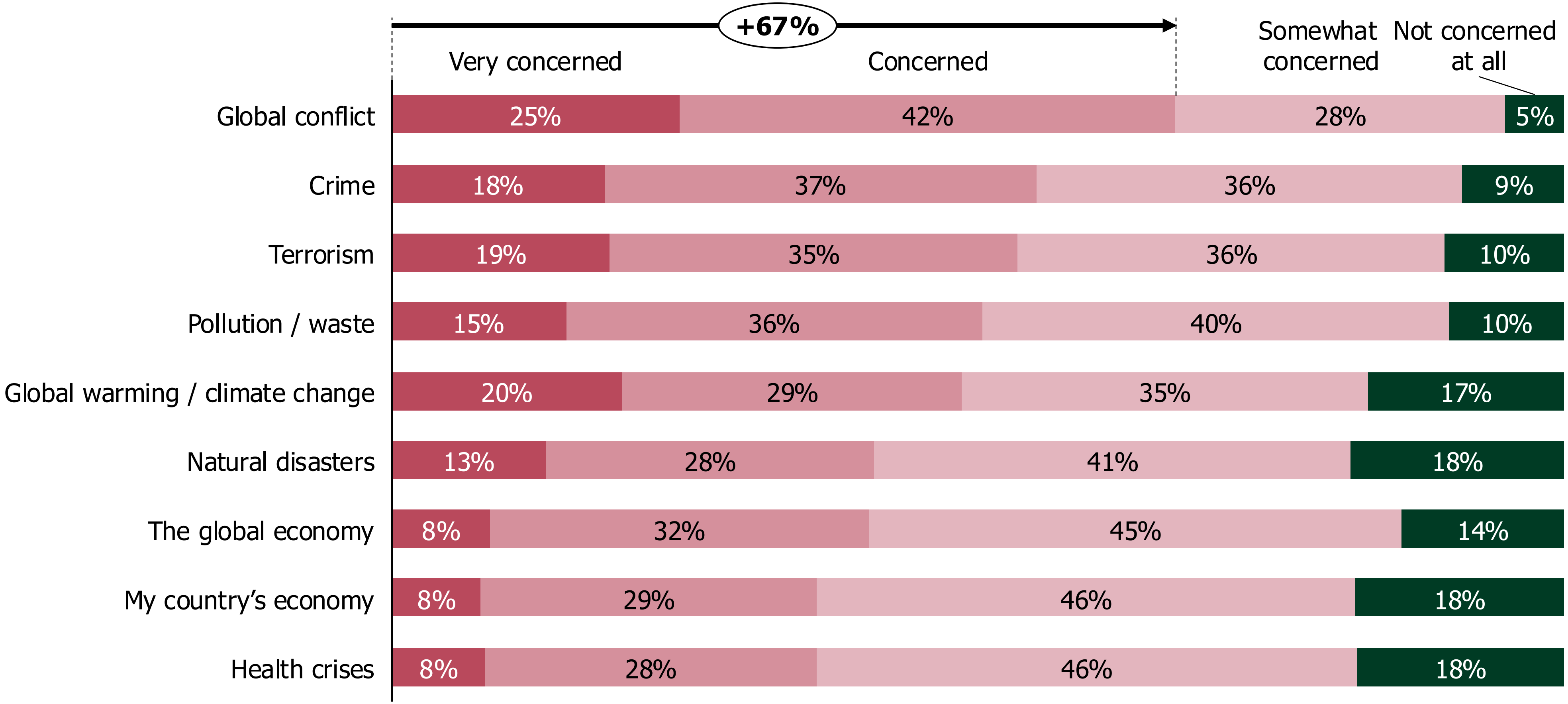
RESPONDENTS' VIEWS ON HOW THEY FEEL ABOUT THE FUTURE OVERALL, Q3 2021 – Q3 2024



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

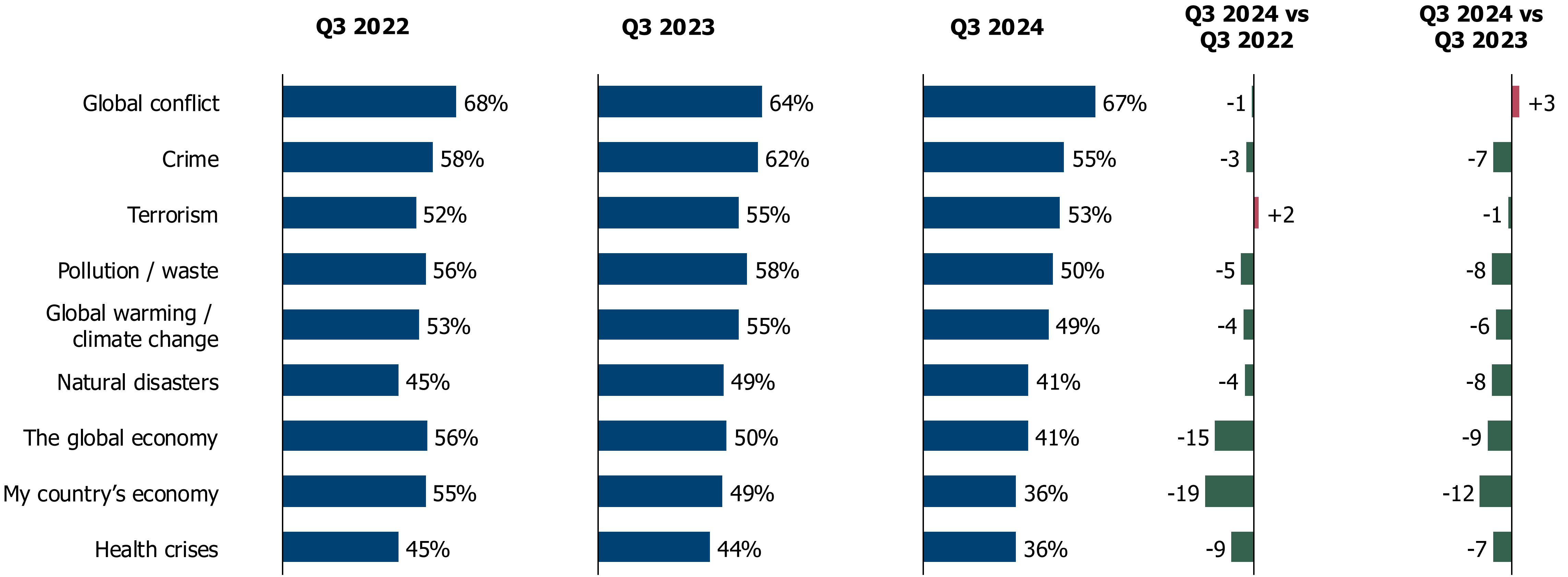
RESPONDENTS' VIEWS ON ISSUES FACING COUNTRY AND WORLD, Q3 2024



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

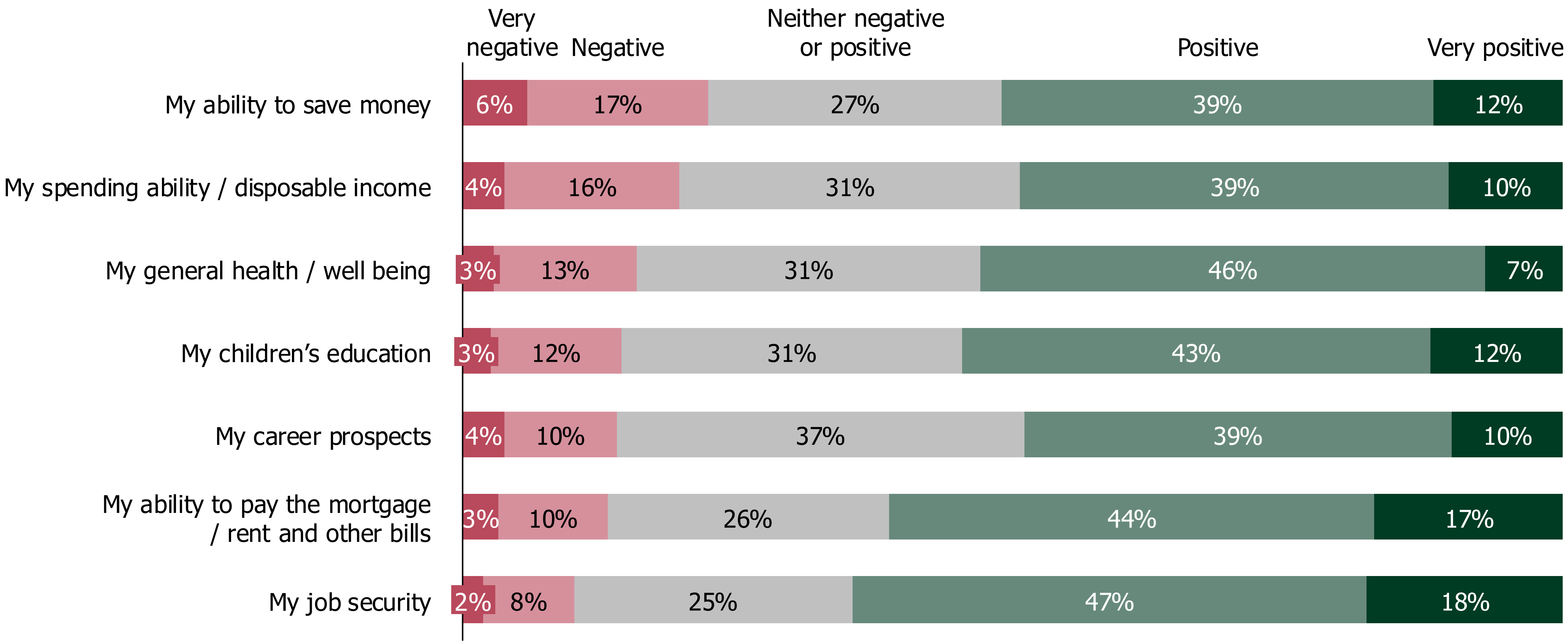
SHARE OF RESPONDENTS WHO WERE 'VERY CONCERNED' OR 'CONCERNED', Q3 2022 – 2024



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

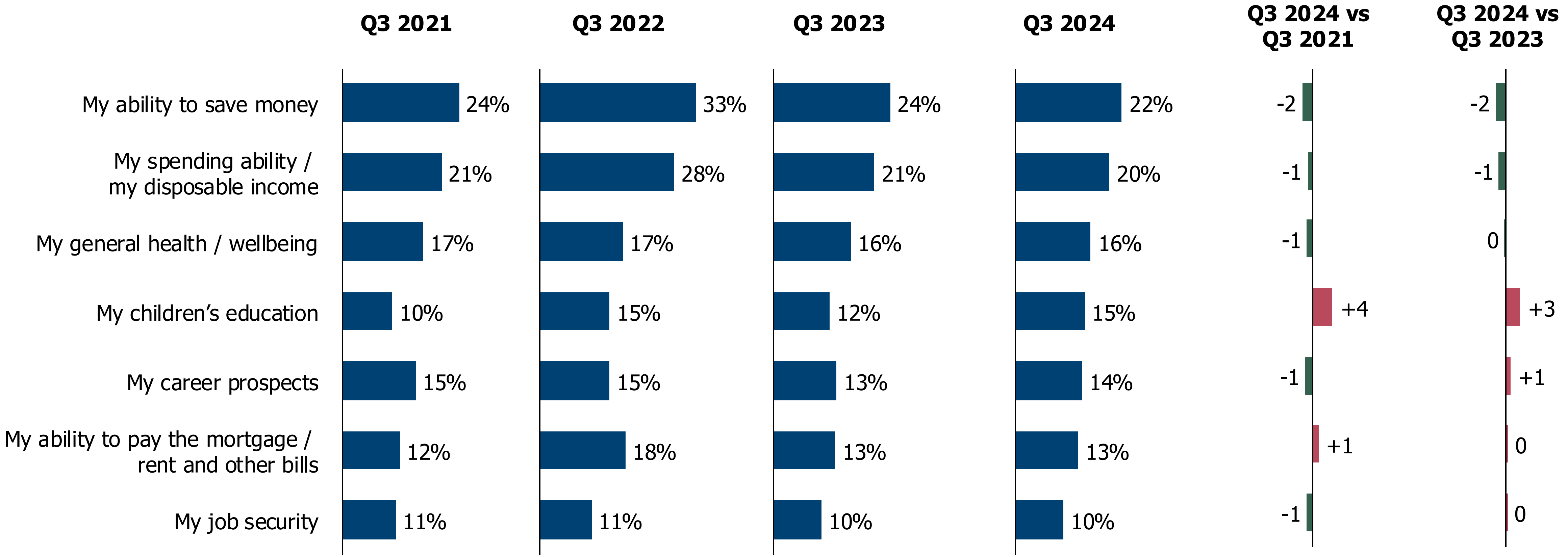


Note: July 2024 n = 1086-1996; Question: *'Now thinking about specific issues you are facing on a personal level, how do you feel about the following?'*, excludes those who answered 'I don't know / doesn't apply'. Due to rounding percentages may not sum precisely

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 = 530-995, 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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Respondents were asked about changes in spend over the past 3 months in 13 categories, which we have grouped as follows

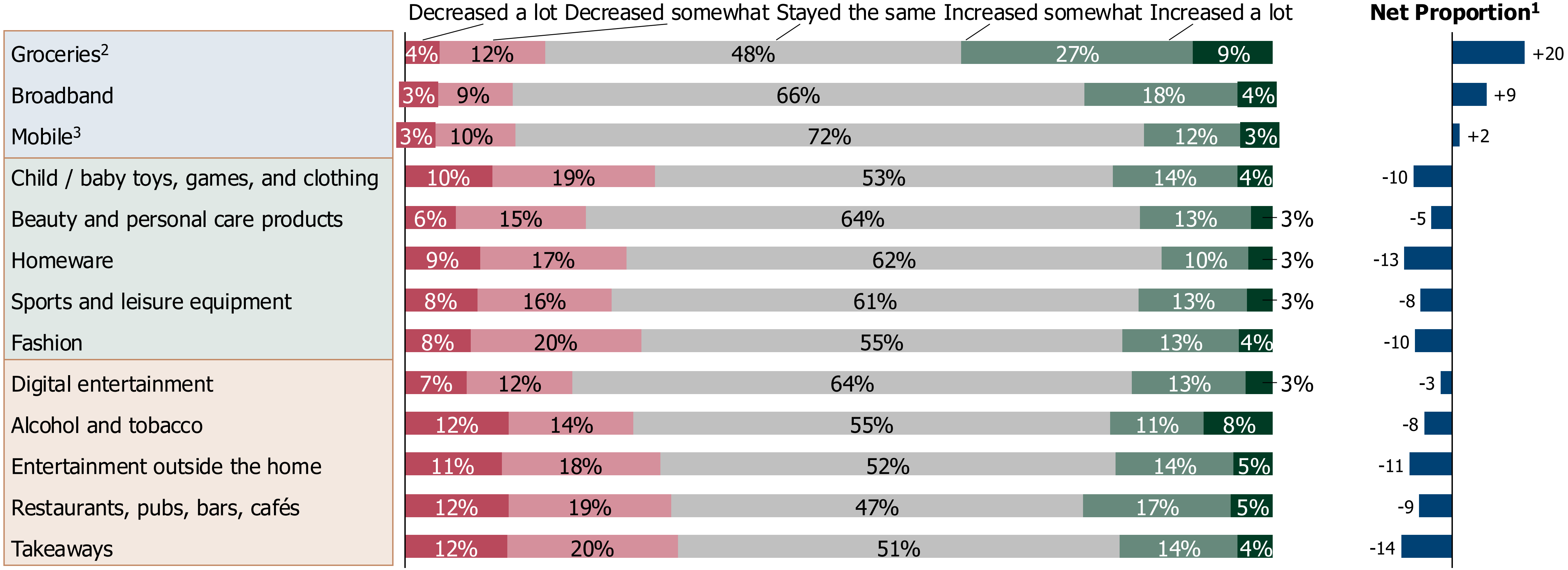
GROUPING OF SPEND CATEGORIES

Groceries[1]	ESSENTIALS
Broadband	ESSENTIALS
Mobile[2]	ESSENTIALS
Child / baby toys, games, and clothing	FASHION & HOME
Beauty and personal care products	FASHION & HOME
Homeware	FASHION & HOME
Sports and leisure equipment	FASHION & HOME
Fashion	FASHION & HOME
Digital entertainment	ENTERTAINMENT
Alcohol and tobacco	ENTERTAINMENT
Entertainment outside the home	ENTERTAINMENT
Restaurants, pubs, bars, cafés	ENTERTAINMENT
Takeaways	ENTERTAINMENT

(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

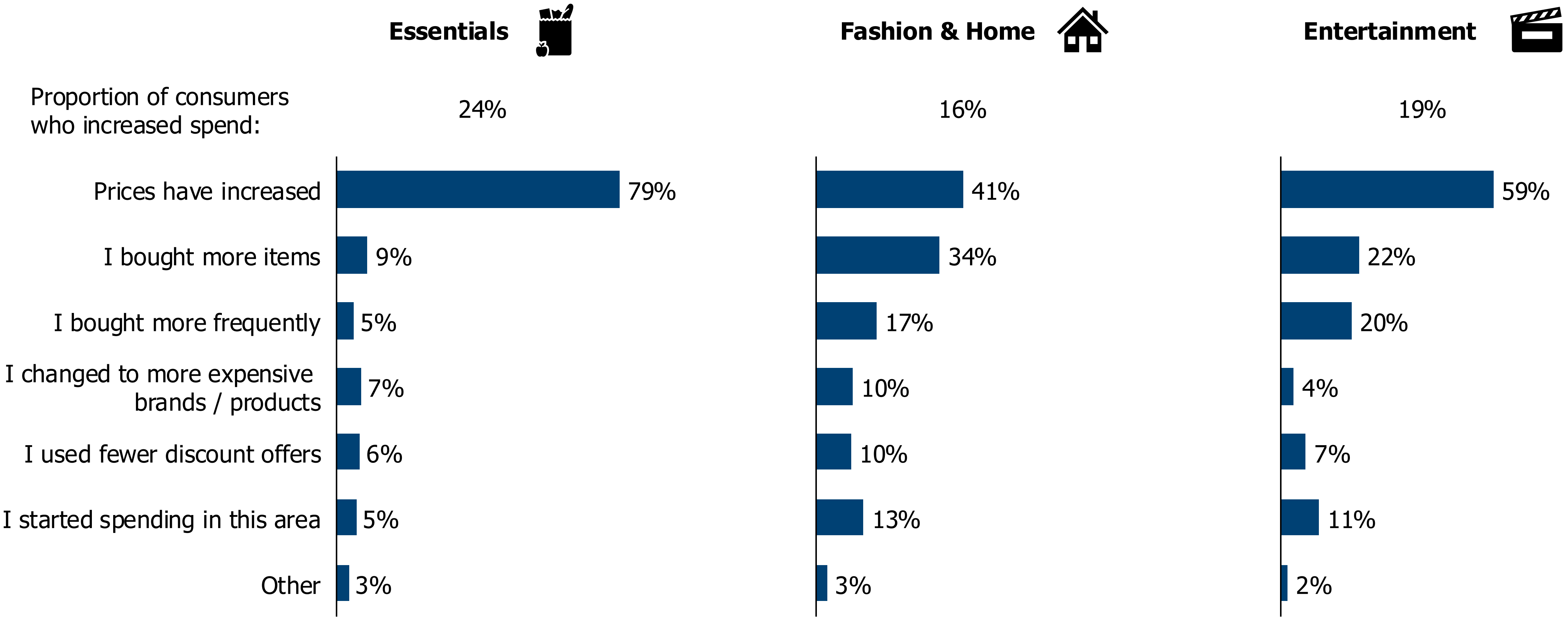
% OF RESPONDENTS WHO HAD INCREASED THEIR SPEND BY CATEGORY, Q3 2022 – 2024

	Q3 2022	Q3 2023	Q3 2024	Q3 2024 vs Q3 2022	Q3 2024 vs Q3 2023
Groceries[1]	40%	40%	36%	-4	-4
Broadband	19%	25%	22%	+3	-3
Mobile[2]	14%	19%	15%	+1	-4
Child / baby toys, games, and clothing	20%	26%	19%	-2	-8
Beauty and personal care products	17%	21%	15%	-2	-5
Homeware	15%	18%	13%	-3	-5
Sports and leisure equipment	16%	23%	16%	0	-7
Fashion	20%	23%	17%	-3	-6
Digital entertainment	18%	22%	16%	-2	-5
Alcohol and tobacco	19%	26%	19%	0	-7
Digital entertainment	18%	22%	18%	0	-3
Restaurants, pubs, bars, cafés	25%	26%	22%	-3	-4
Takeaways	20%	23%	18%	-2	-5

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

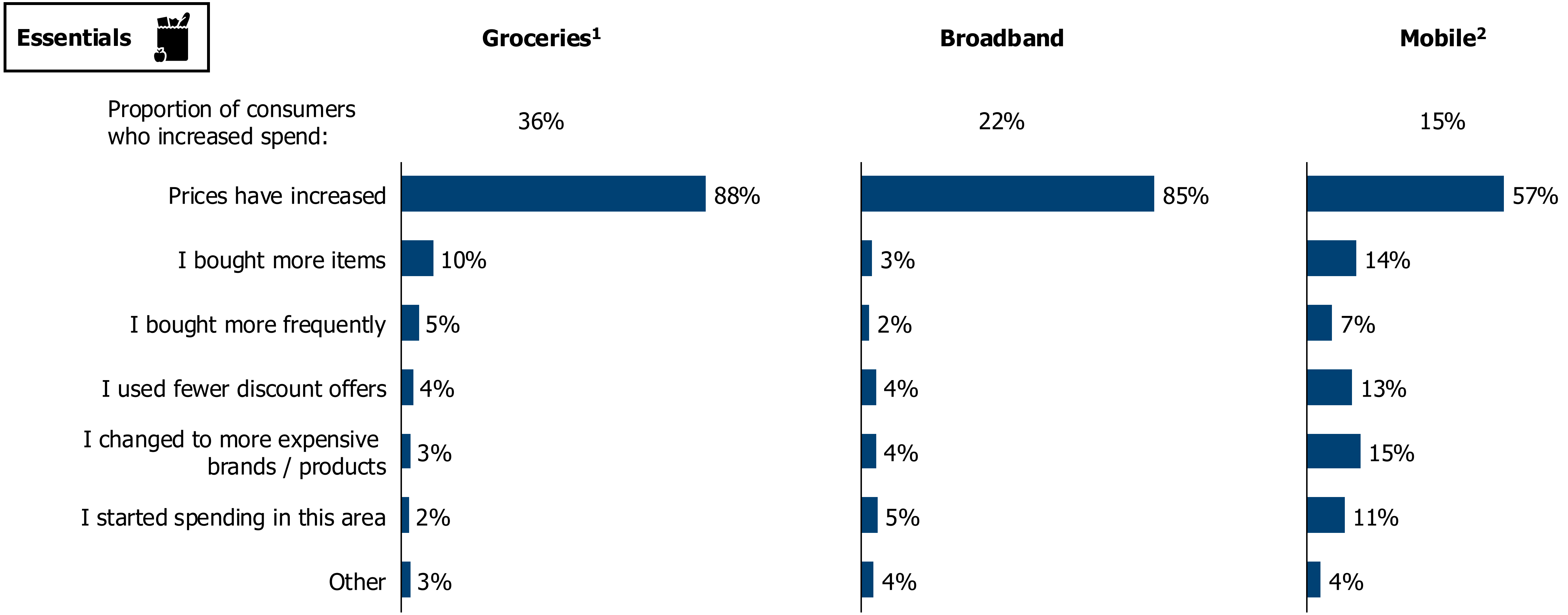
WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, AVERAGE OF CATEGORIES, Q3 2024



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

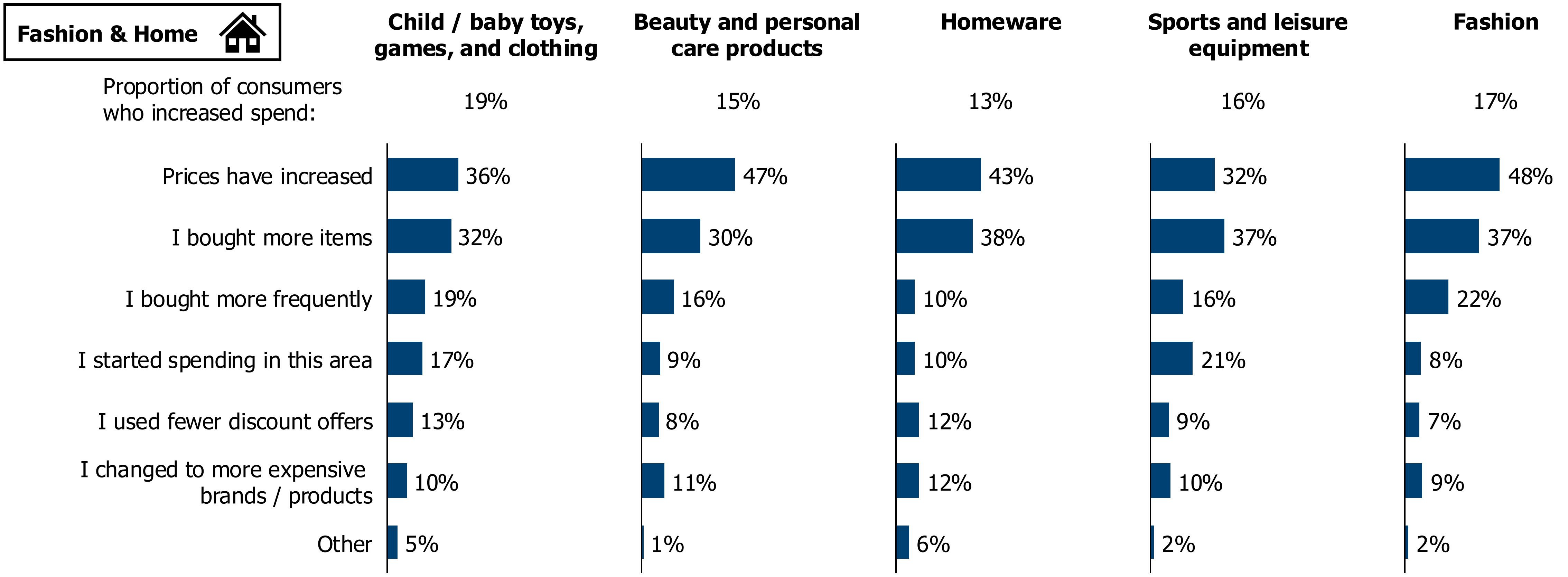
WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, Q3 2024



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'

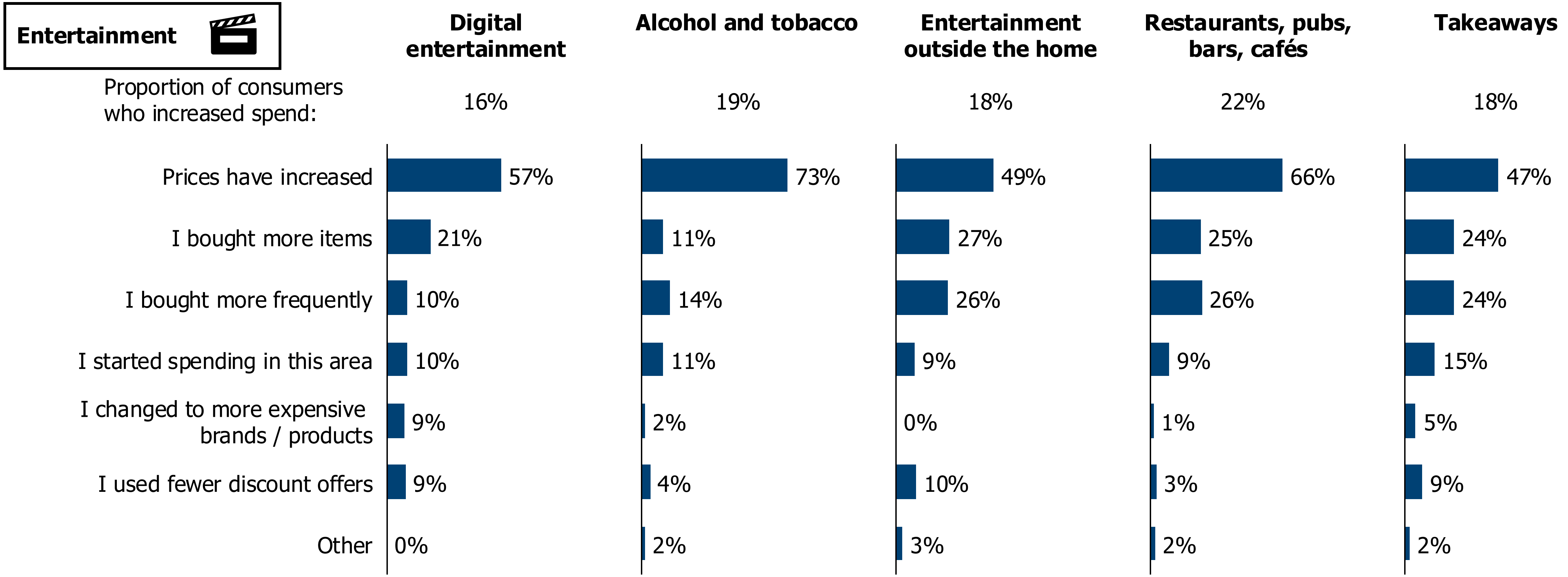
WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, Q3 2024



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.

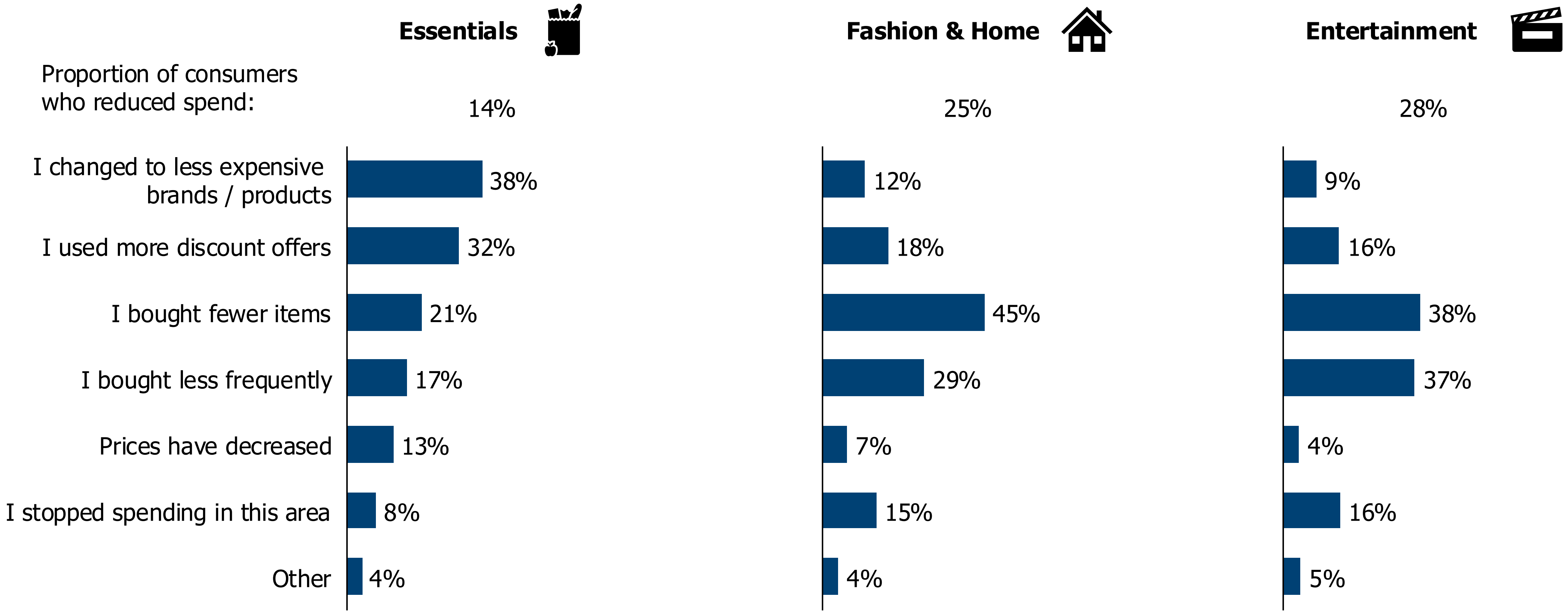
% OF RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE BY CATEGORY, Q3 2022 – 2024

	Q3 2022	Q3 2023	Q3 2024	Q3 2024 vs Q3 2022	Q3 2024 vs Q3 2023
Groceries[1]	19%	18%	16%	-3	-2
Broadband	12%	11%	13%	+1	+1
Mobile[2]	13%	12%	13%	0	+1
Child / baby toys, games, and clothing	25%	23%	29%	+3	+5
Beauty and personal care products	21%	22%	21%	0	-1
Homeware	24%	26%	26%	+2	0
Sports and leisure equipment	24%	22%	24%	0	+2
Fashion	25%	27%	27%	+2	0
Digital entertainment	19%	19%	19%	+1	+1
Alcohol and tobacco	25%	23%	26%	+1	+4
Entertainment outside the home	32%	34%	29%	-3	-5
Restaurants, pubs, bars, cafés	30%	34%	31%	+1	-3
Takeaways	31%	34%	31%	+1	-2

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

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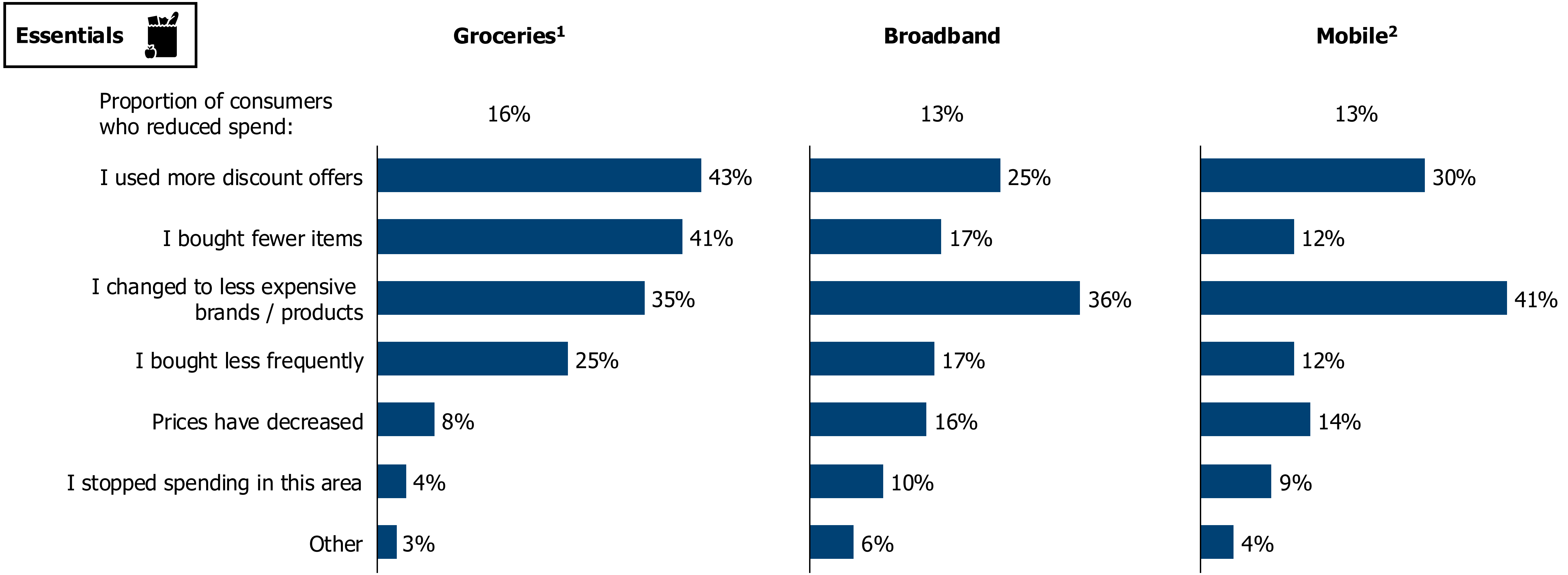
Within Essentials categories, trading down was the primary lever for those reducing spend in Telecoms; in Grocery, customers primarily used discount offers

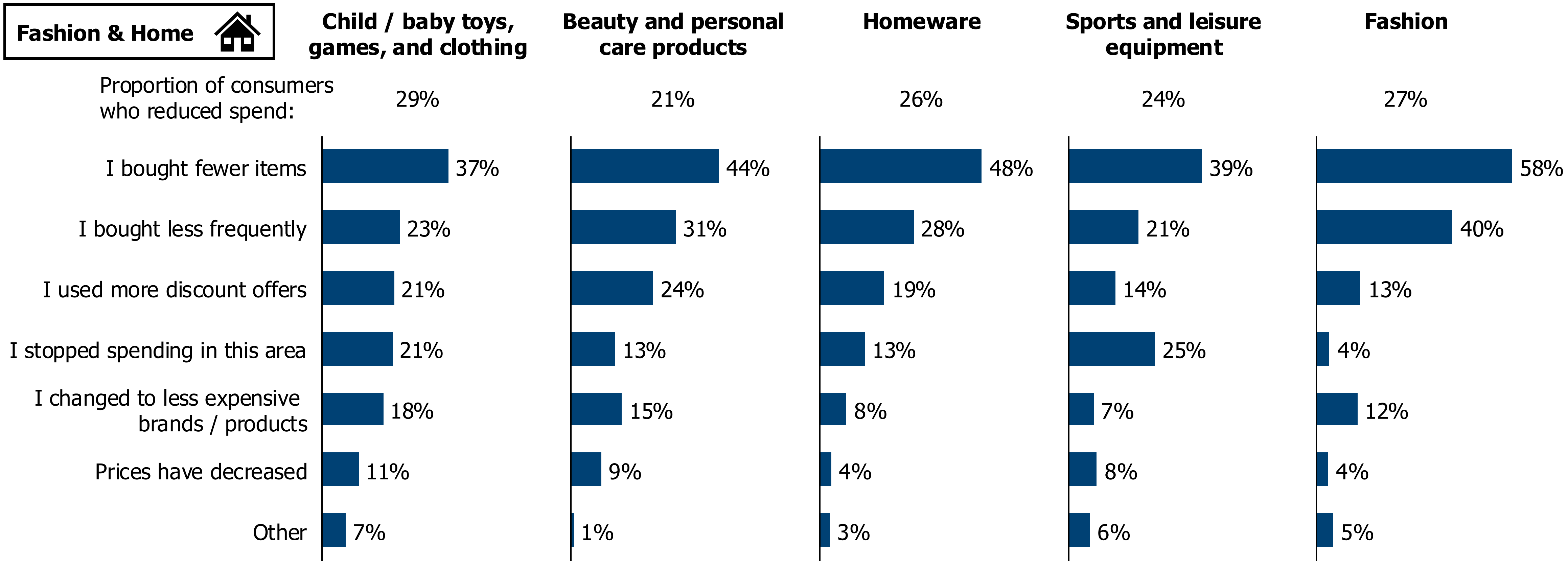
WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, Q3 2024



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

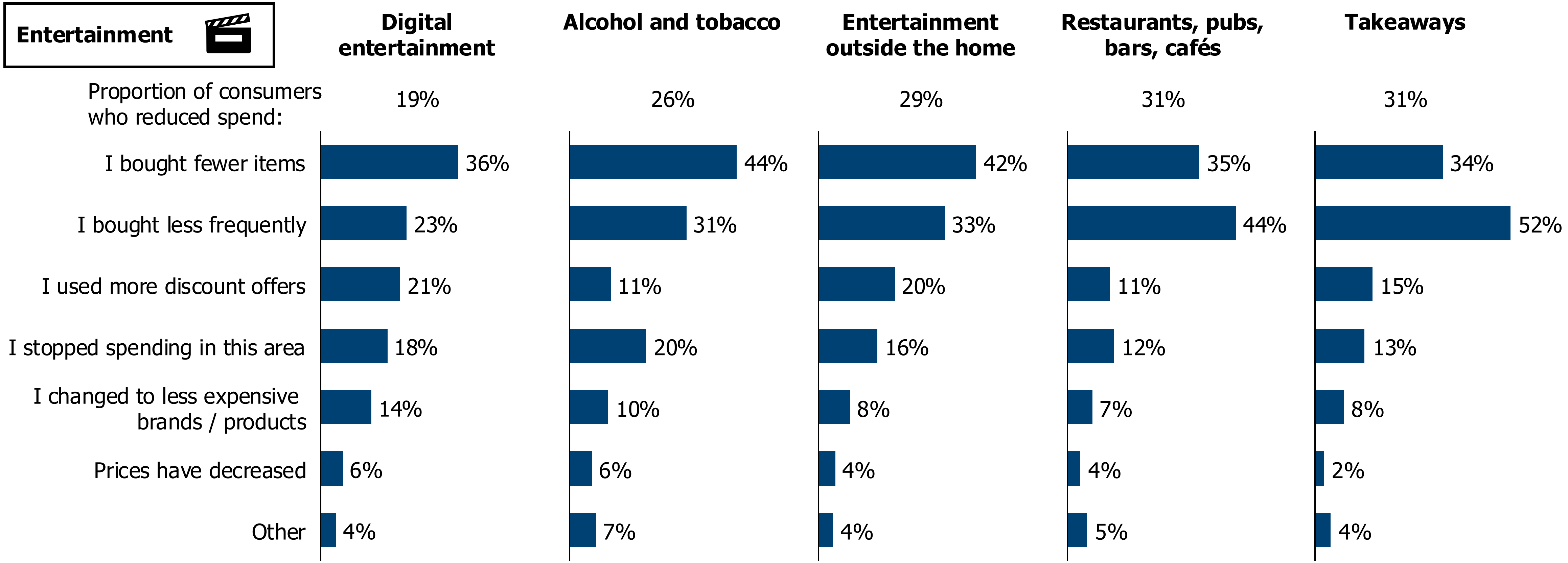
WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, Q3 2024



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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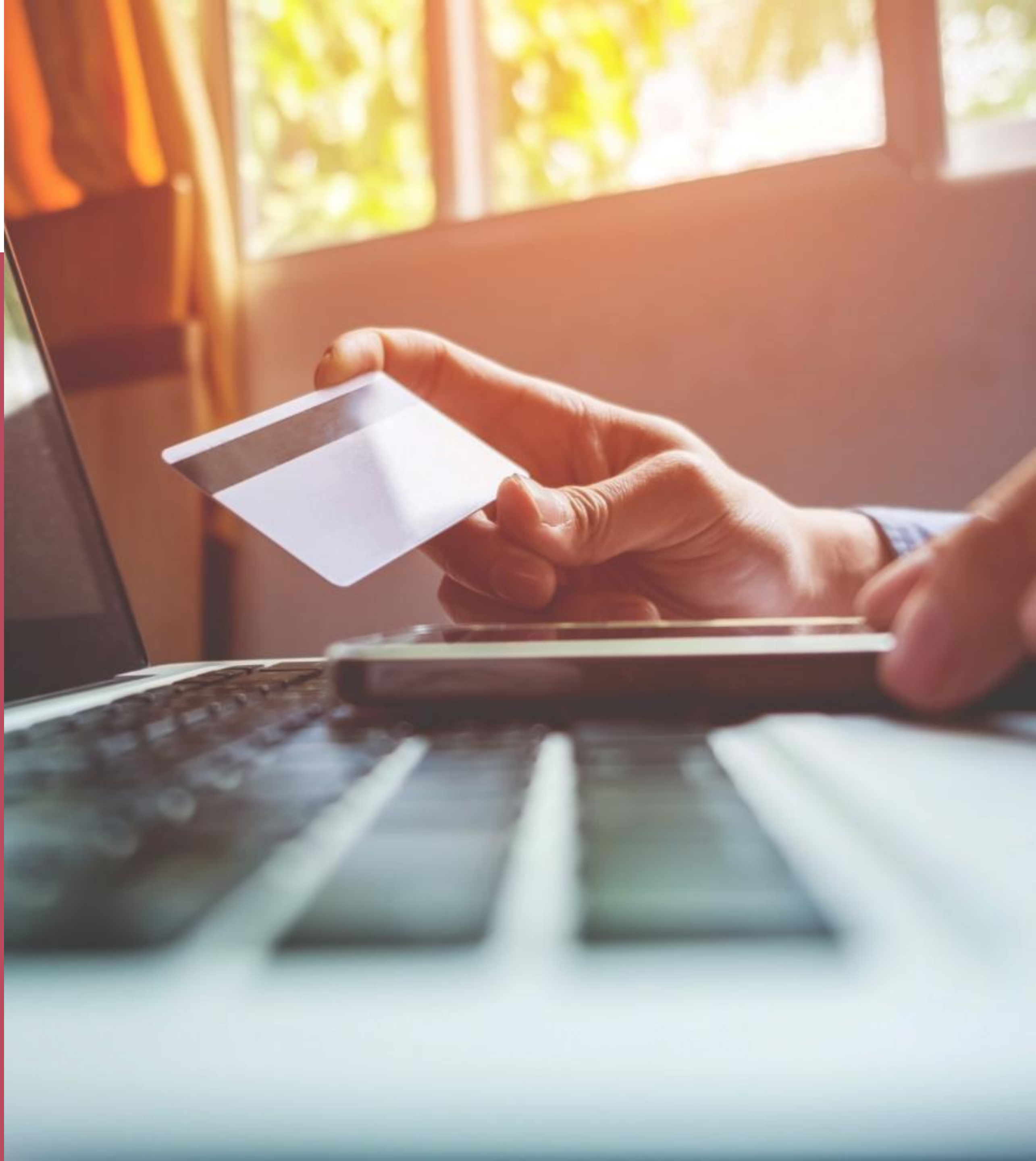

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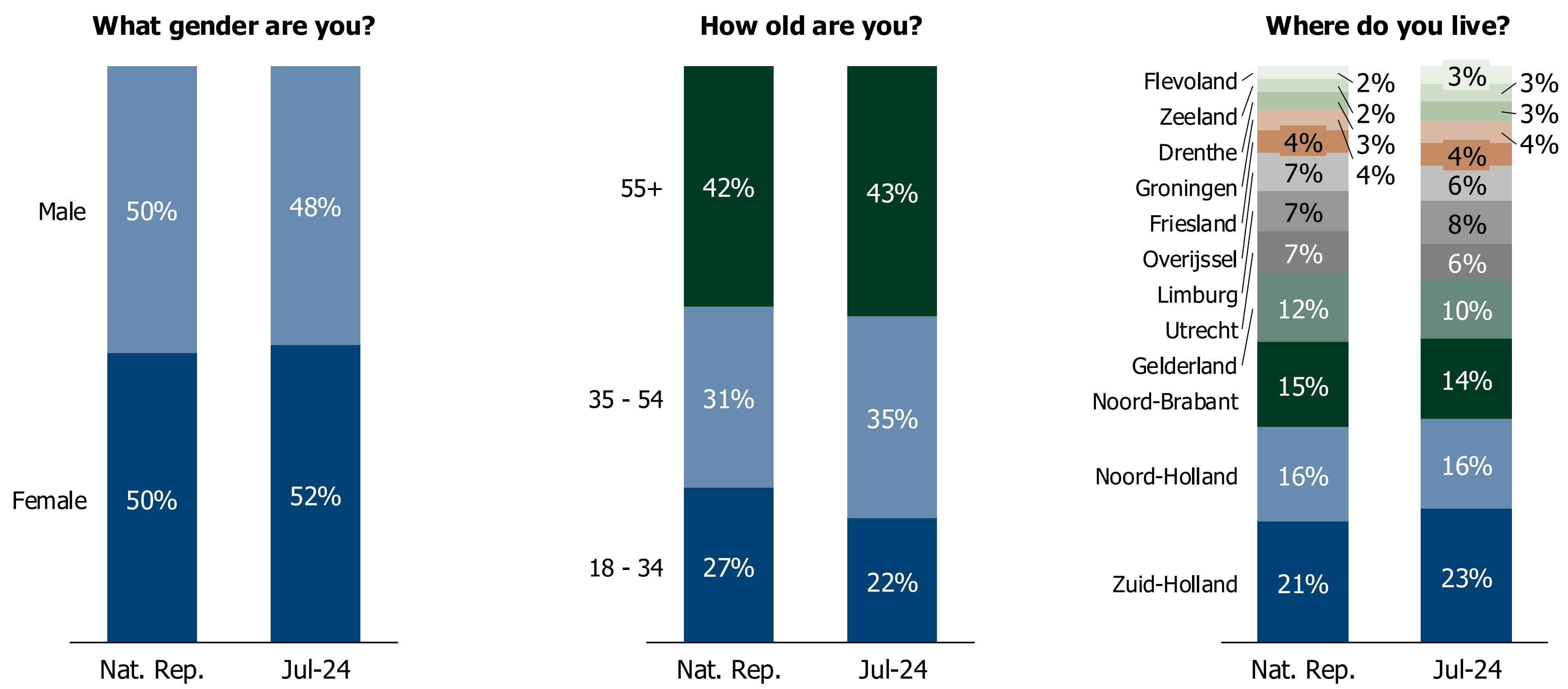
The survey respondents are a nationally representative sample in terms of gender, age and regional distribution

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