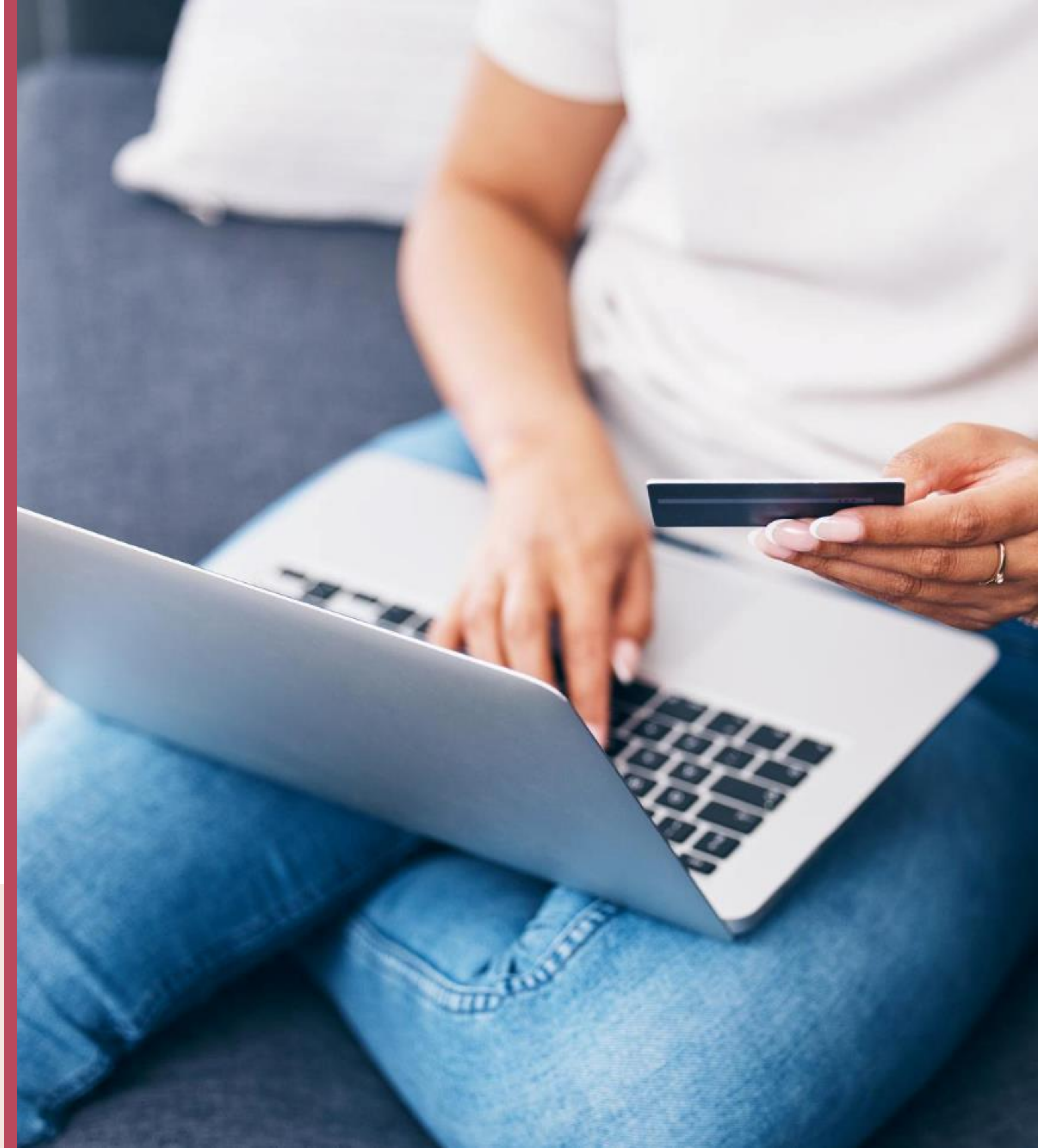
Eden McCallum Consumer Survey

Consumer Sentiment: Netherlands

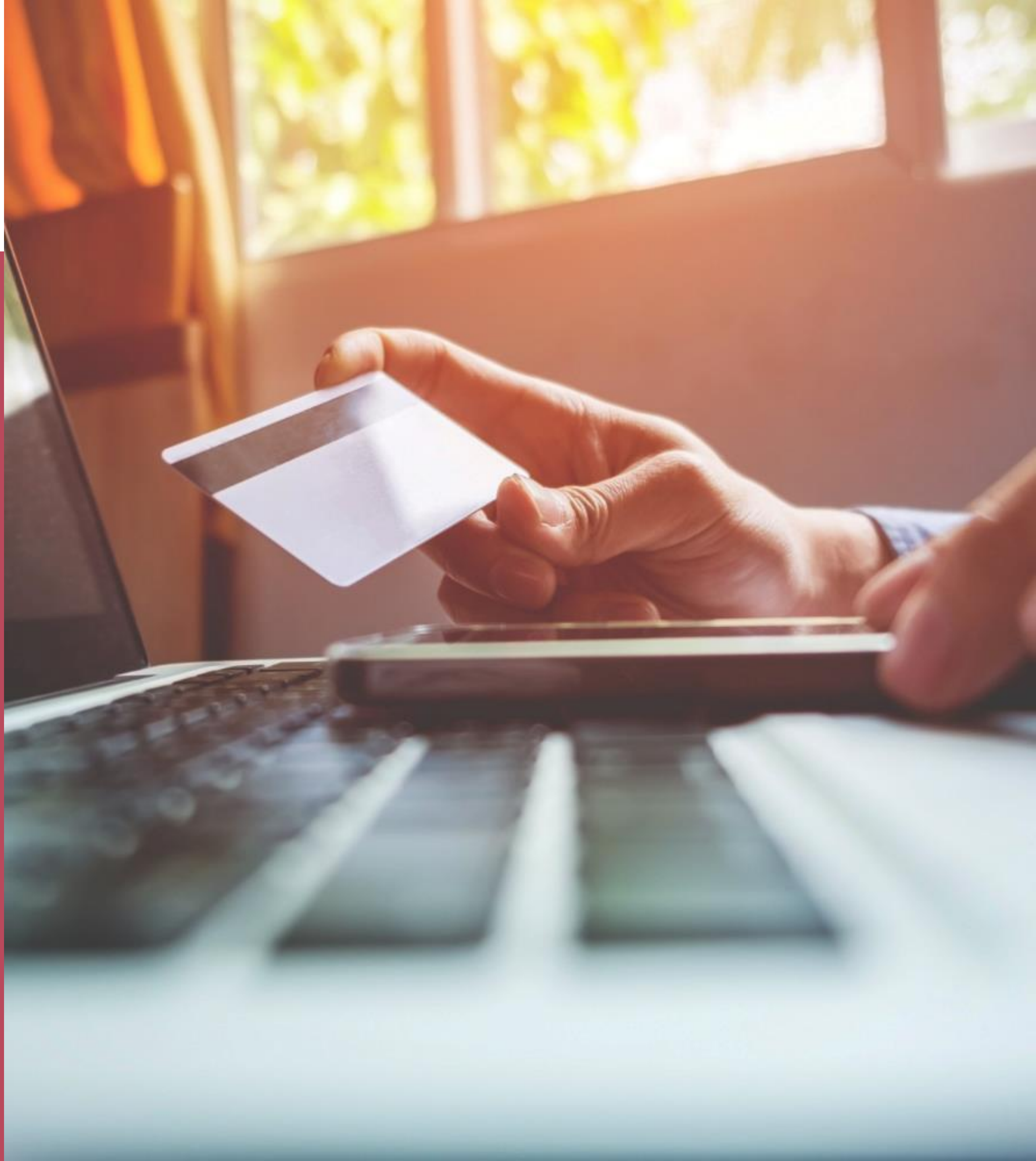
August 2023

eden mccallum



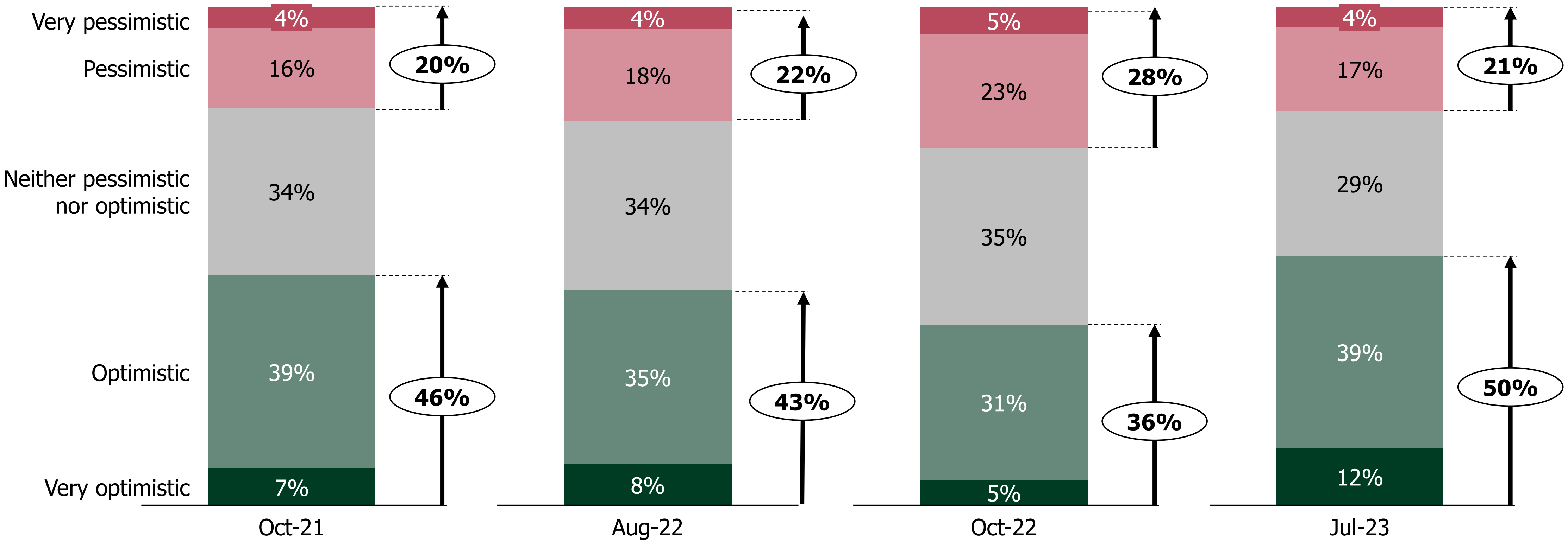
Contents

Sentiment
Spending
Sample details



Overall consumer sentiment in the Netherlands is improving, with half of respondents ‘optimistic’, up from 36% in Oct 2022 and 46% in Oct 2021

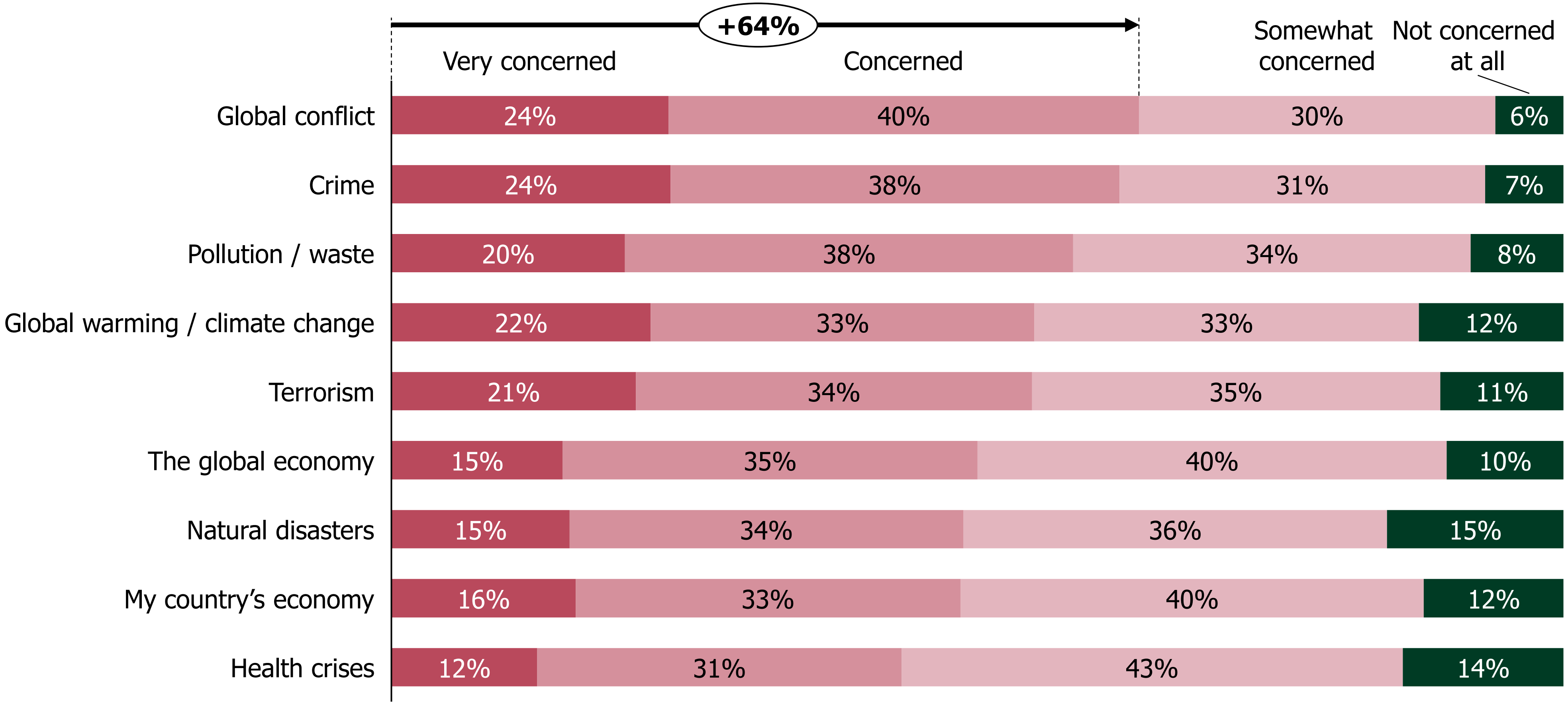
RESPONDENTS’ VIEWS ON HOW THEY FEEL ABOUT THE FUTURE OVERALL, OCTOBER 2021 - JULY 2023



Note: October 2021 n = 988, August 2022 n = 3136, October 2022 n = 2736, July 2023 n = 1562; 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

64% of NL respondents are concerned about global conflict, with less than half of respondents concerned about the global or Dutch economies

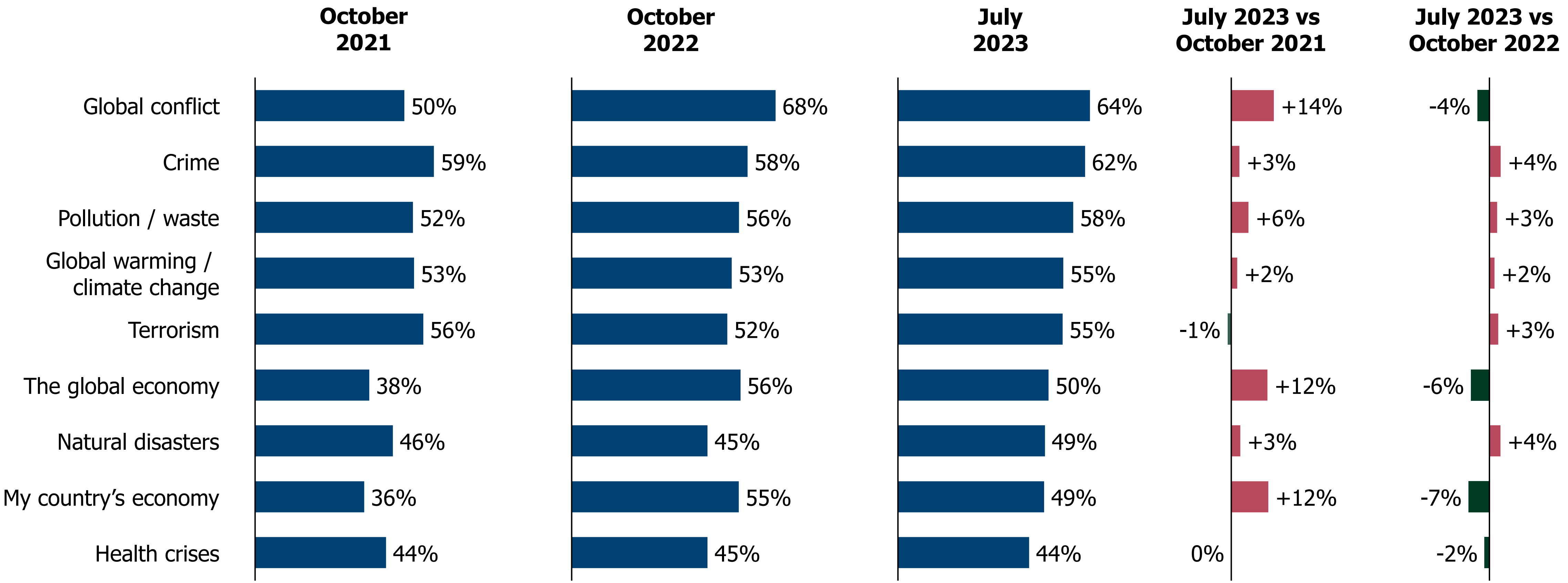
RESPONDENTS' VIEWS ON ISSUES FACING COUNTRY AND WORLD, JULY 2023



Note: July 2023 n = 1553-1571; 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

Levels of concern have increased in most areas since Oct 2021, but concern about global conflict and the global and domestic economies has dropped since Oct 2022

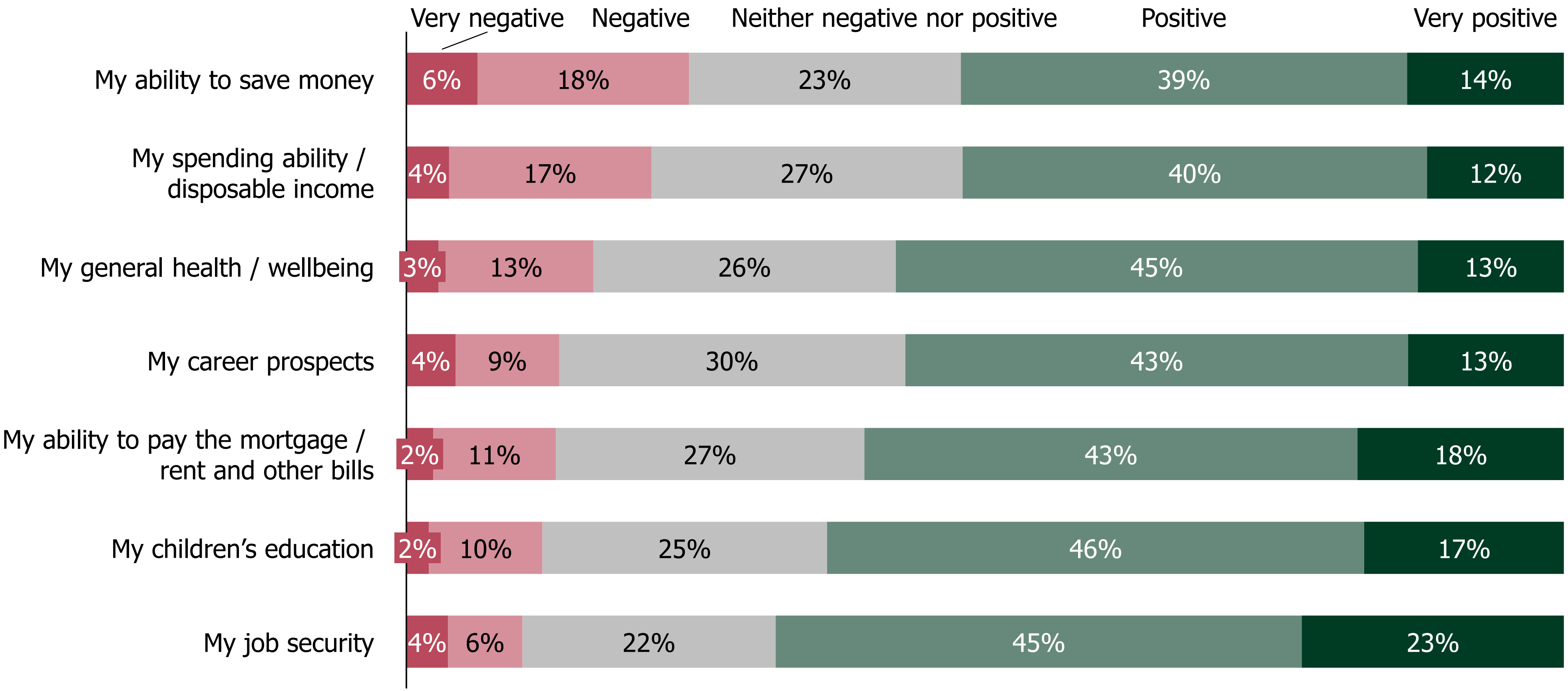
SHARE OF RESPONDENTS WHO WERE 'VERY CONCERNED' OR 'CONCERNED', OCTOBER 2021 & 2022 & JULY 2023



Note: October 2021 n = 988, October 2022 n = 2667-2704, July 2023 n = 1553-1571; 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

Less than 1 in 4 respondents are ‘negative’ or ‘very negative’ about any personal issue, although the ability to spend and save money is most concerning

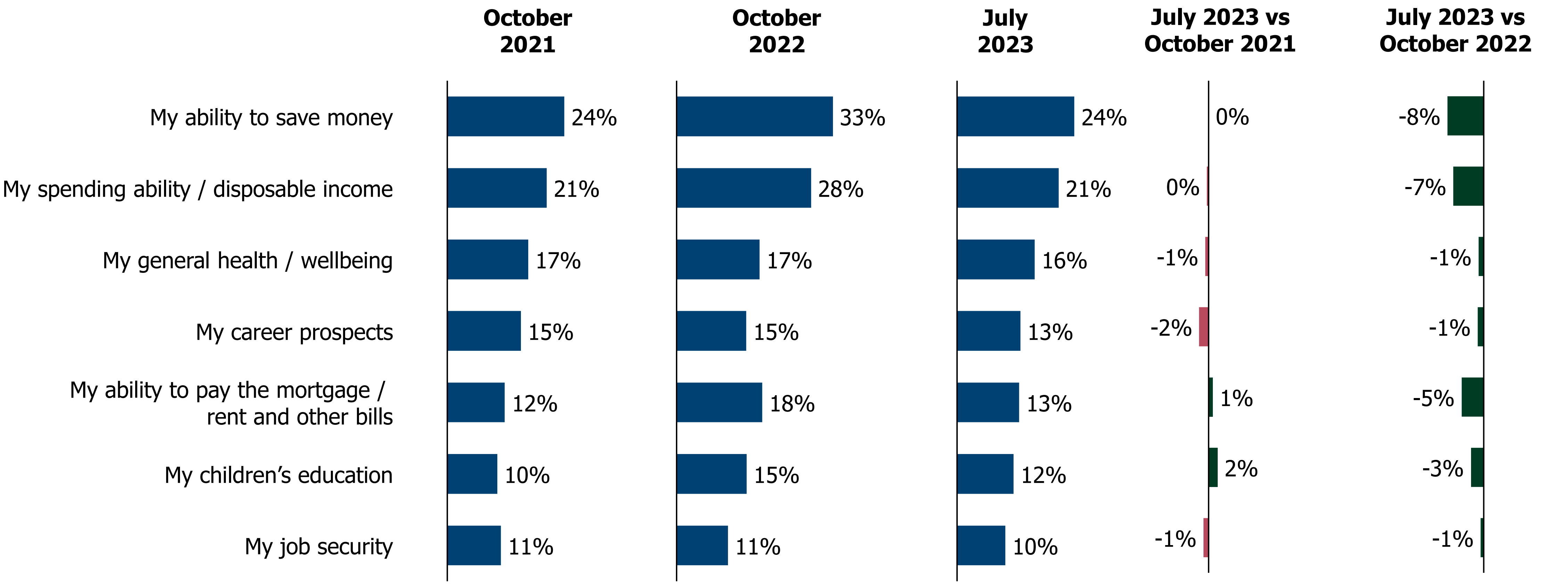
RESPONDENTS' VIEWS ON PERSONAL ISSUES FACED, JULY 2023



Note: July 2023 n = 927-1584; 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

The proportion of respondents that are ‘negative’ about personal issues has decreased in all areas tested since Oct 2022, coming back to Oct 2021 levels

SHARE OF RESPONDENTS WHO WERE ‘VERY NEGATIVE’ OR ‘NEGATIVE’, OCTOBER 2021, OCTOBER 2022 & JULY 2023



Note: October 2021 n = 988, October 2022 n = 1437-2716, July 2023 n = 927-1584; 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

Contents

Sentiment

Spending

Sample details

eden mccallum

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

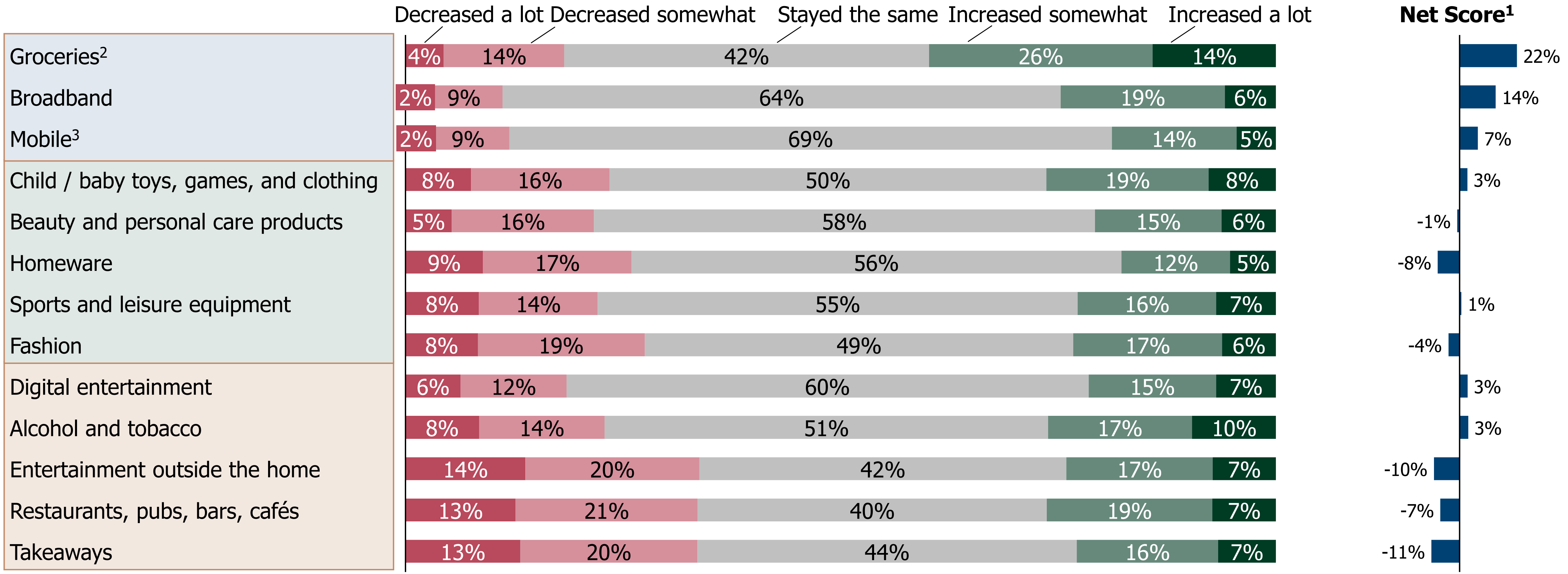
GROUPING OF SPEND CATEGORIES

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

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

In the last 3 months, respondents reported a positive net spend score in 7 of 13 categories, most notably Essentials such as Groceries, Broadband and Mobile

RESPONDENTS’ CHANGE IN SPENDING BY CATEGORY IN PAST 3 MONTHS, JULY 2023



Note: July 2023 n = 982-1573; 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’; (2) Excludes Alcohol and tobacco, (3) Includes Mobile data. Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

More respondents increased spending in Groceries than any other category, although the gap to other categories has decreased since Oct 2022

RESPONDENTS WHO HAD INCREASED THEIR SPEND BY CATEGORY, AUGUST 2022, OCTOBER 2022 & JULY 2023

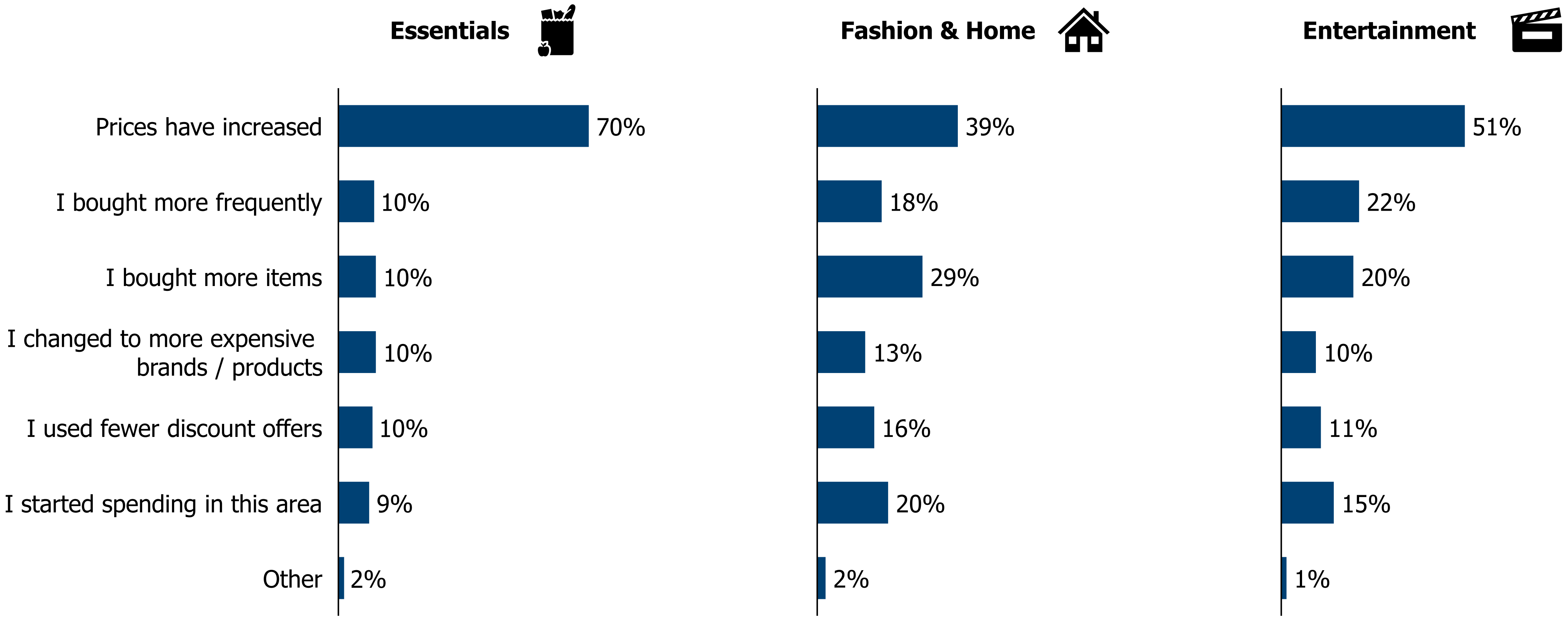
	August 2022	October 2022	July 2023	August 2022 vs July 2023	October 2022 vs July 2023
Groceries[1]	40%	37%	40%	0%	3%
Broadband	19%	14%	25%	6%	10%
Mobile	14%	13%	19%	5%	6%
Child / baby toys, games, and clothing	20%	17%	26%	6%	10%
Beauty and personal care products	17%	13%	21%	4%	7%
Homeware	15%	13%	18%	2%	5%
Sports and leisure equipment	16%	14%	23%	7%	9%
Fashion	20%	16%	23%	3%	8%
Digital entertainment	18%	14%	22%	4%	7%
Alcohol and tobacco	19%	16%	26%	7%	10%
Digital entertainment	18%	14%	22%	4%	7%
Restaurants, pubs, bars, cafés[2]	25%	19%	26%	1%	7%
Takeaways	20%	17%	23%	3%	6%

Note: August 2022 n = 1875-3148, October 2022 n = 1561-2697, July 2023 n = 982-1573; 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

dynata eden mccallum

Higher prices were the key driver for those who increased spend for all product groups, but most significantly in Essentials

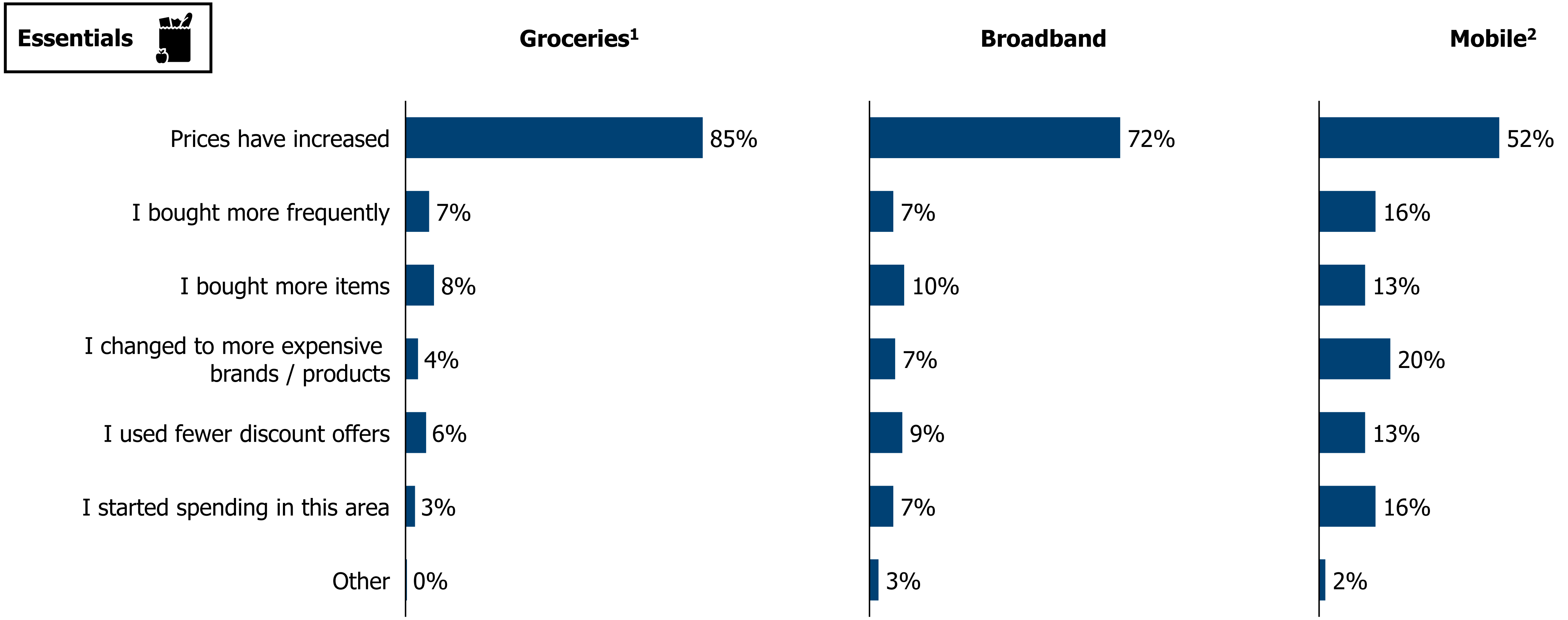
WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, AVERAGE OF CATEGORIES, JULY 2023



Note: July 2023 n = 95-220; 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'. Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

Higher prices were the key driver for increasing spending on Essentials, true for 85% of the c.40% of respondents who spent more on Groceries

WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, JULY 2023

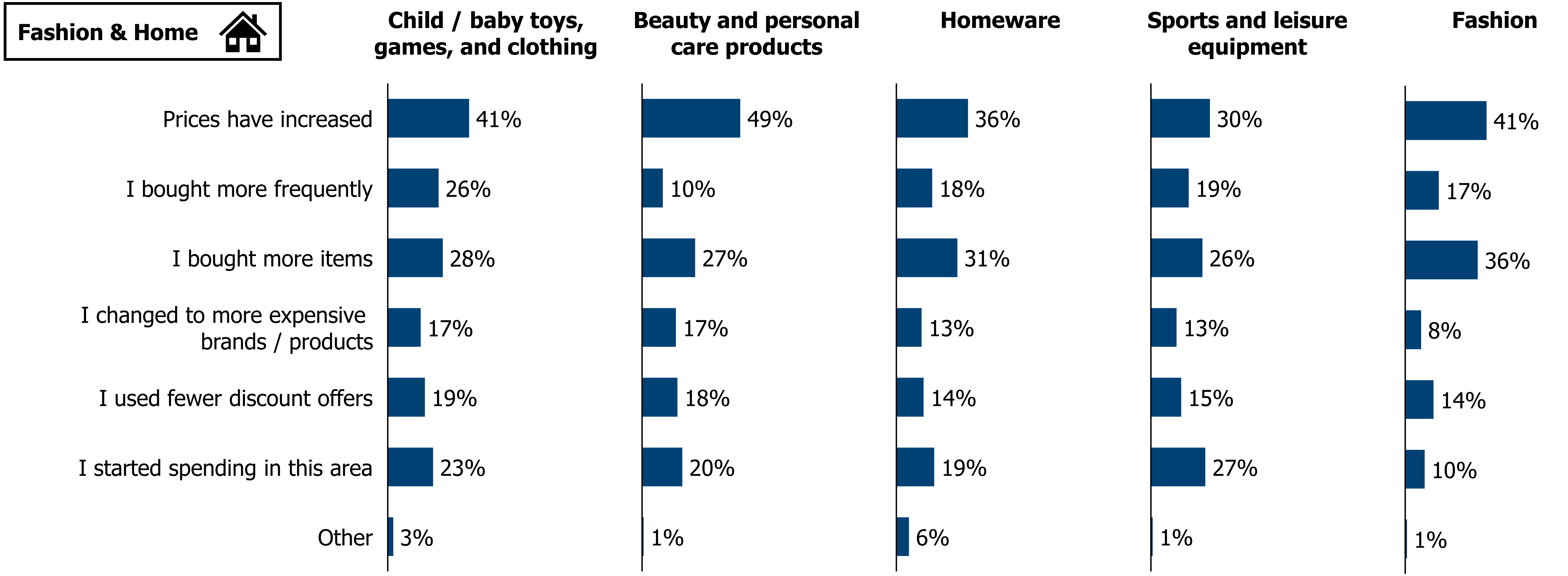


Note: July 2023 n = 166-220; Question: *'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend more on this category?',* includes those who answered 'Increased a lot' and 'Increased somewhat'; (1) Excludes Alcohol and tobacco (2) Includes Mobile data
Source: Eden McCallum & Dynata surveys

dynata eden mccallum

For the c.20-25% spending more on Fashion & Home, higher prices were the leading driver; 1 in 3 also bought more items in all categories

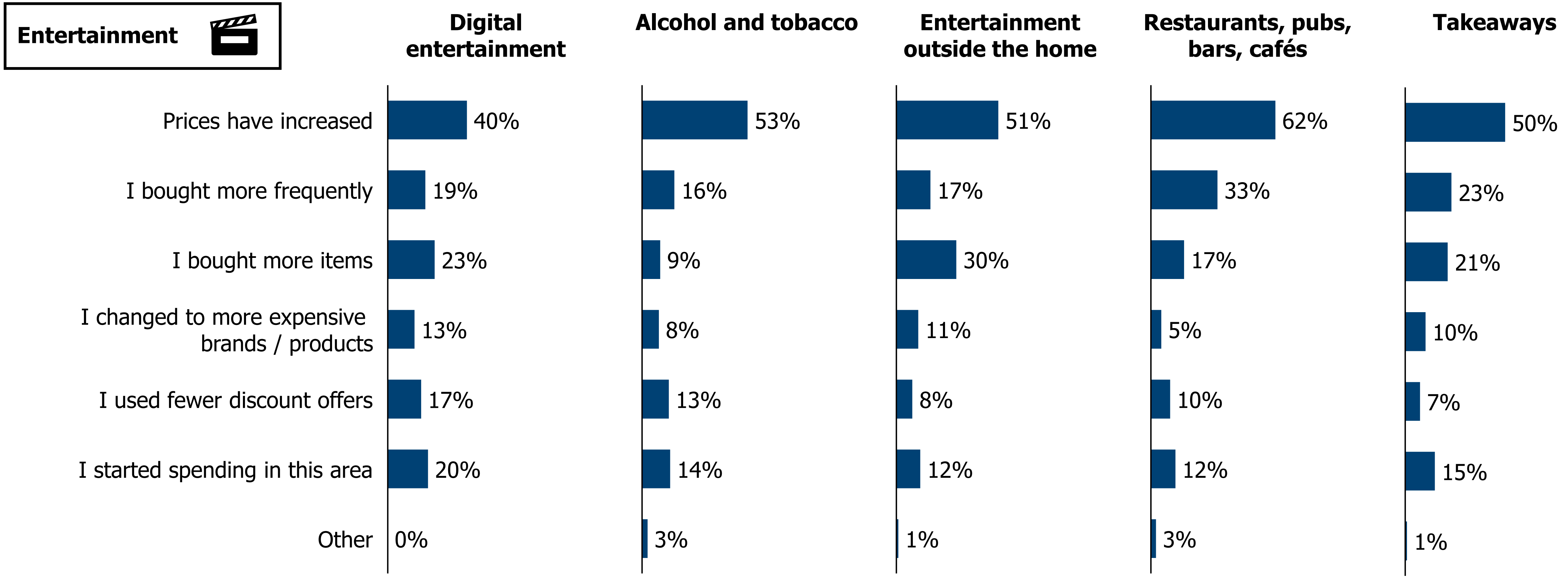
WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, JULY 2023



Note: July 2023 n = 95-145; 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'. Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

Higher prices were also a driver behind increased spending for the c.20-25% of respondents who spent more on Entertainment categories

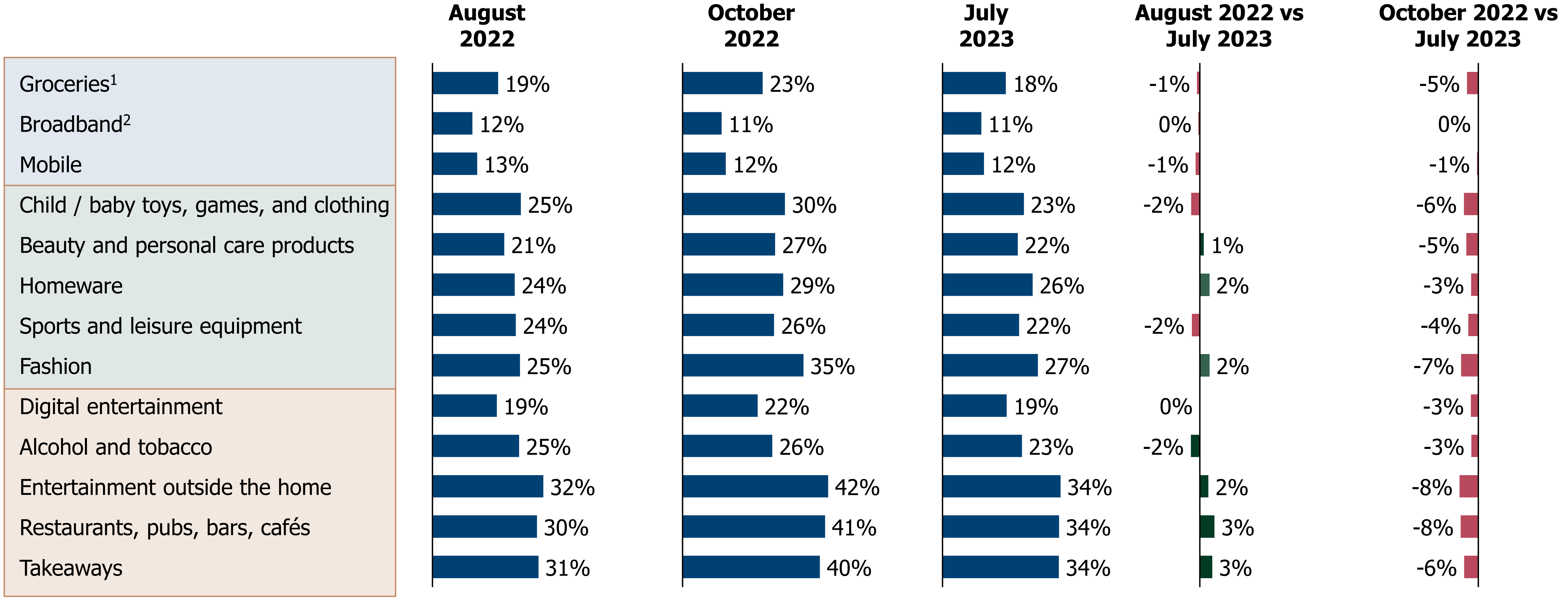
WAYS IN WHICH RESPONDENTS SPENT MORE BY CATEGORY IN LAST 3 MONTHS, JULY 2023



Note: July 2023 n = 100-149; 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'. Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

The proportion of respondents decreasing spending has decreased in most categories since October 2022

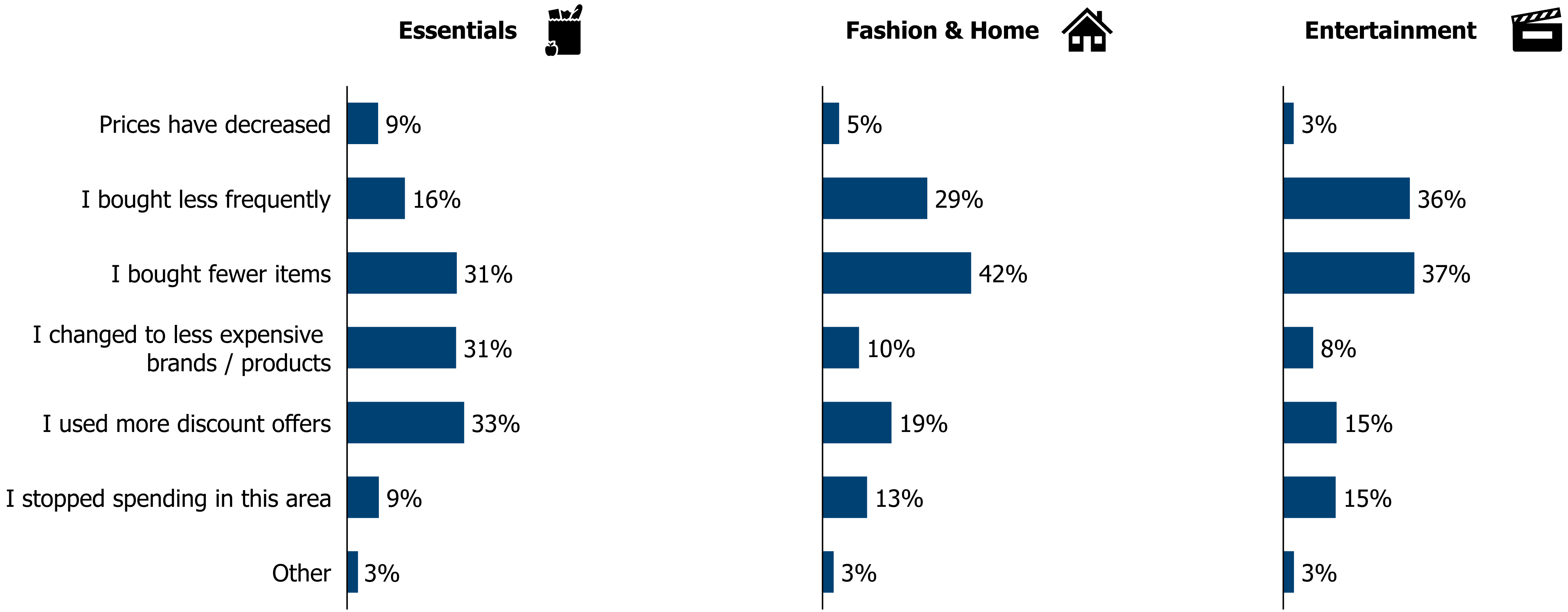
RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE BY CATEGORY, AUGUST 2022, OCTOBER 2022 & JULY 2023



Note: August 2022 n = 187-3148, October 2022 n = 1561-2697, July 2023 n = 982-1573; 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

Respondents used a wide spread of methods to reduce spend in the different categories, combining less frequent purchases, fewer items and more discounts

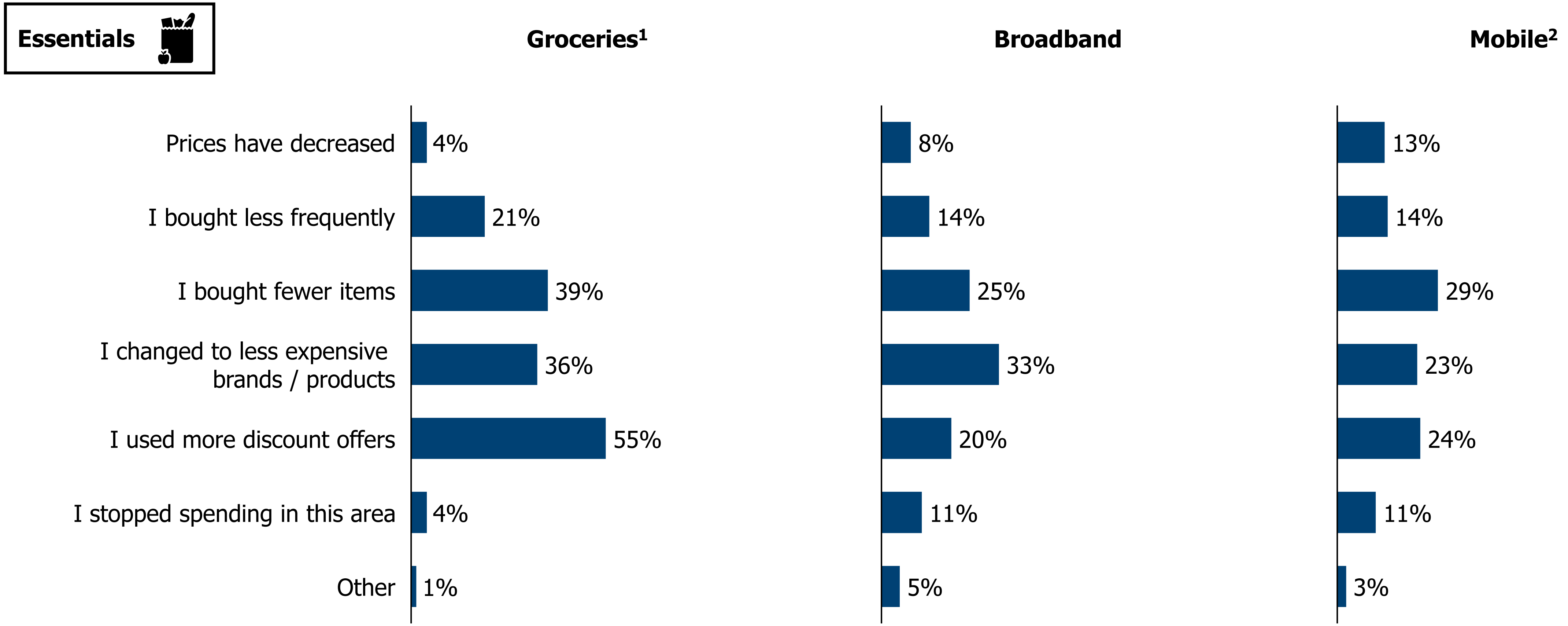
WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, AVERAGE OF CATEGORIES, JULY 2023



Note: July 2023 n = 67-192, 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'. Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

Fewer than 20% of respondents spent less on Essentials. For those that did, trading down, buying less and using discounts were key drivers

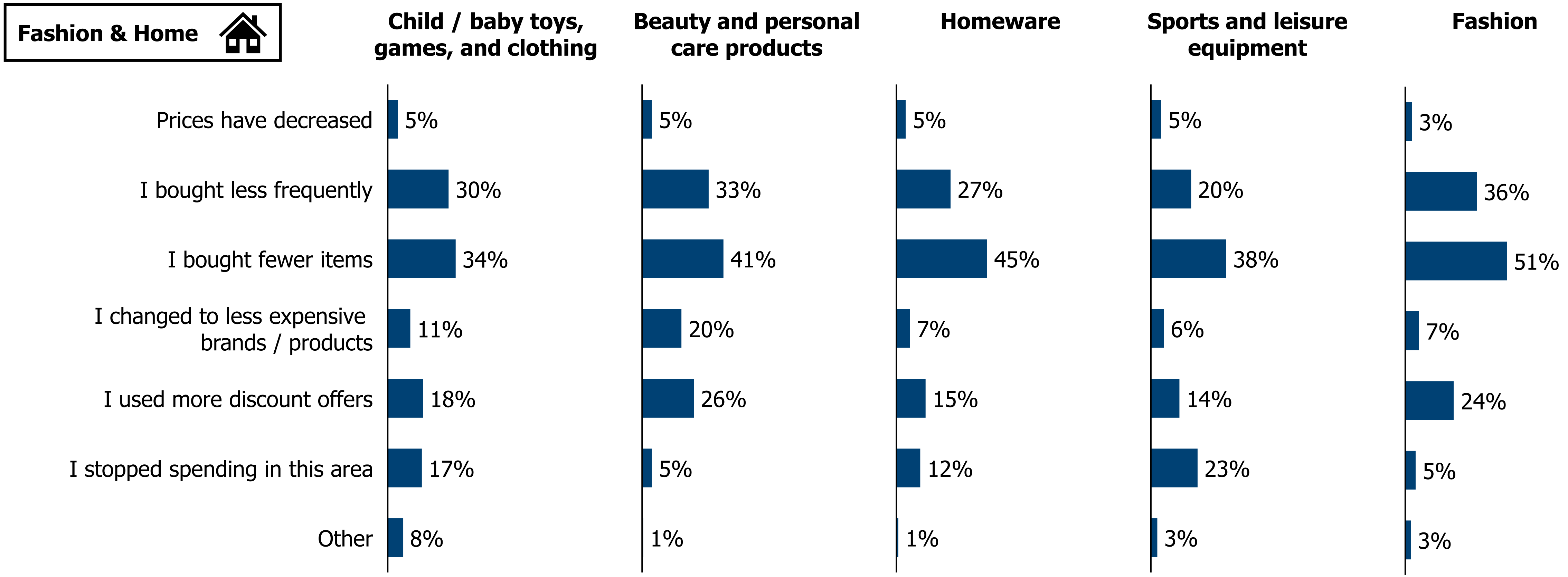
WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, JULY 2023



Note: July 2023 n = 67-119; 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) Include,s Mobile data
Source: Eden McCallum & Dynata surveys

For the c.20-30% who spent less in Fashion & Home, buying fewer items or less frequently were key, although 23% stopped spending entirely on Sports & Leisure equipment

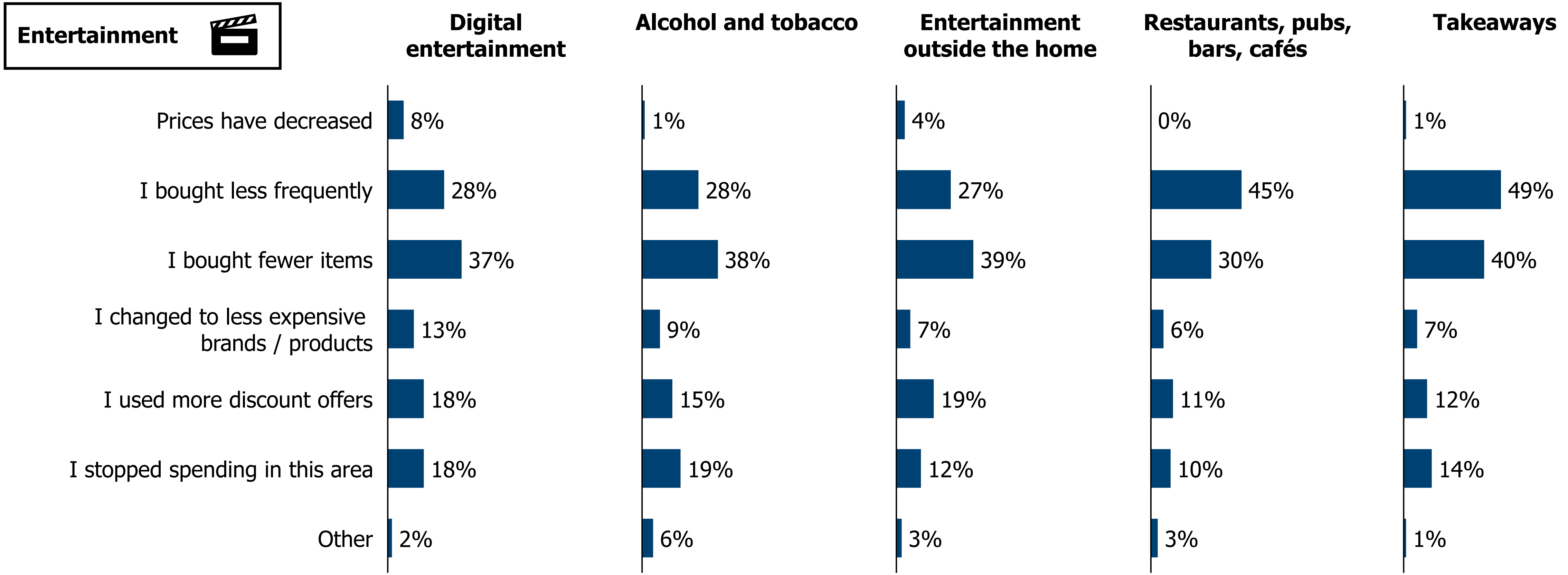
WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, JULY 2023



Note: July 2023 n = 141-192; 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'. Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

Of the c.20-35% who spent less in Entertainment, buying less frequently was key for Takeaways and Restaurants, and buying fewer items in other categories

WAYS IN WHICH RESPONDENTS SPENT LESS BY CATEGORY IN LAST 3 MONTHS, JULY 2023



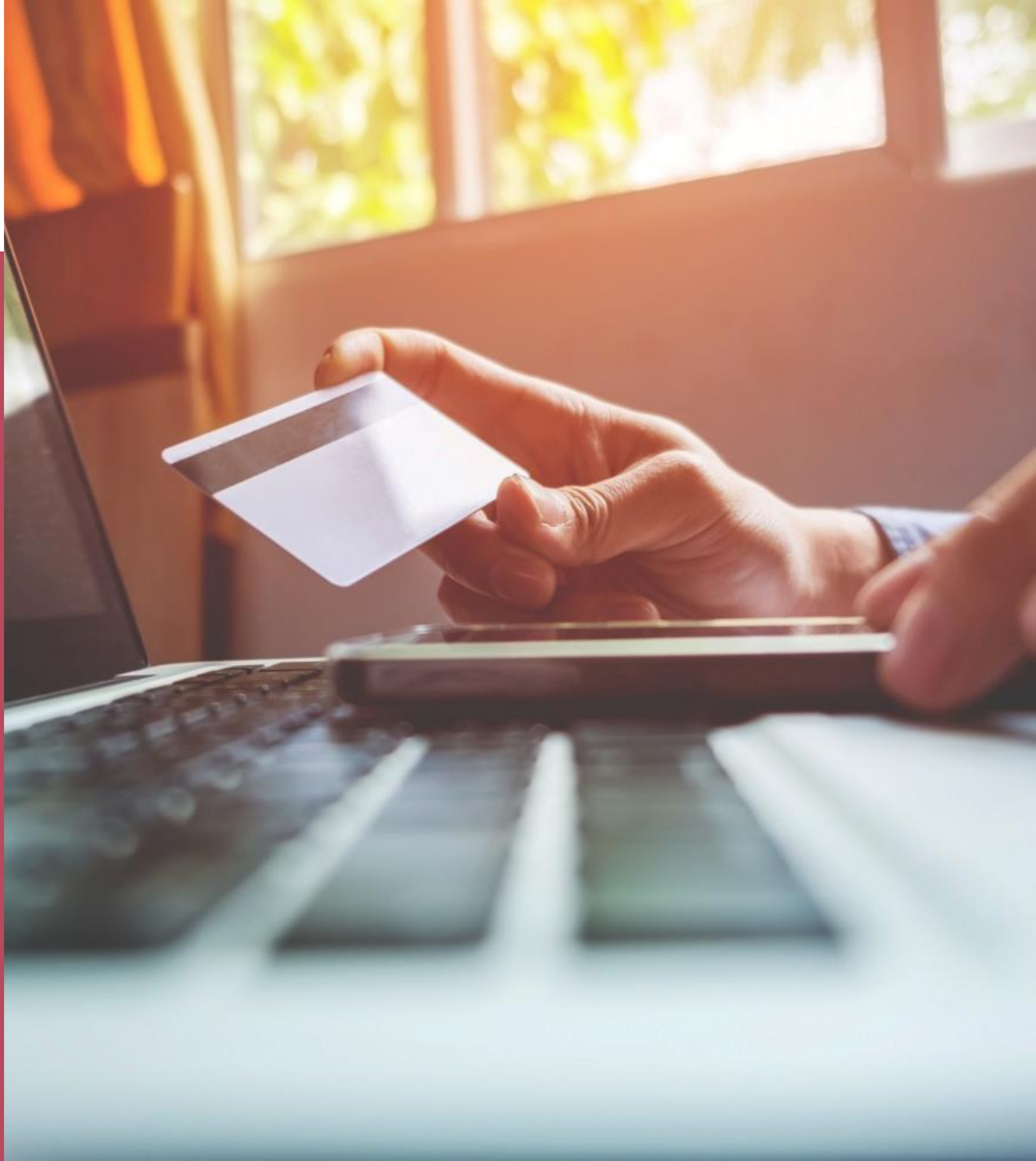
Note: July 2023 n = 138-187; Question: *'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend less on this category?',* includes those who answered 'Decreased a lot' and 'Decreased somewhat'. Due to rounding percentages may not sum precisely
Source: Eden McCallum & Dynata surveys

Contents

Sentiment

Spending

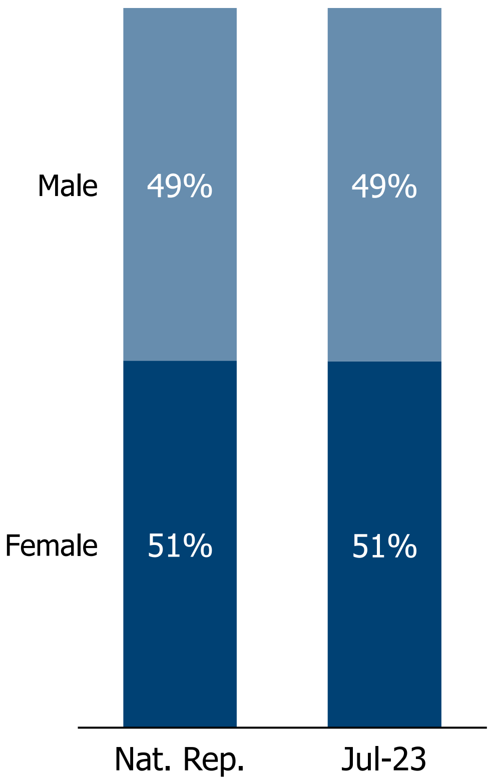
Sample details



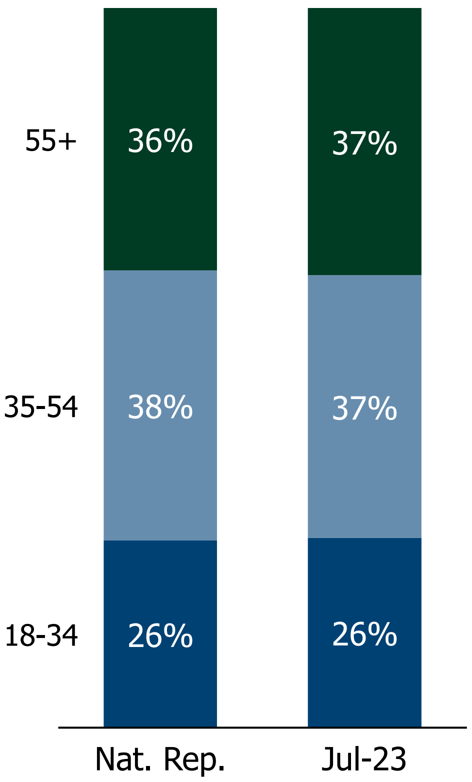
Survey sample information

KEY FACTS ABOUT THE NL SAMPLE

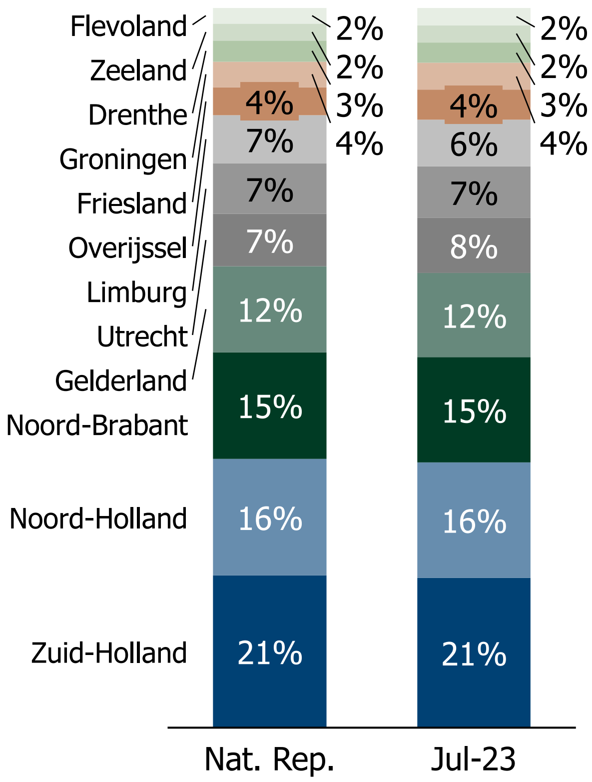
What gender are you?



How old are you?



Where do you live?



Note: Totals may not equal 100% due to rounding; n = 1575-1588; Questions: *'What gender do you identify as?' / 'How old are you?' / 'Where do you live?',* excludes respondents who answered 'Other' and 'Prefer not to say'
Source: Eden McCallum & Dynata surveys, National Statistics Office