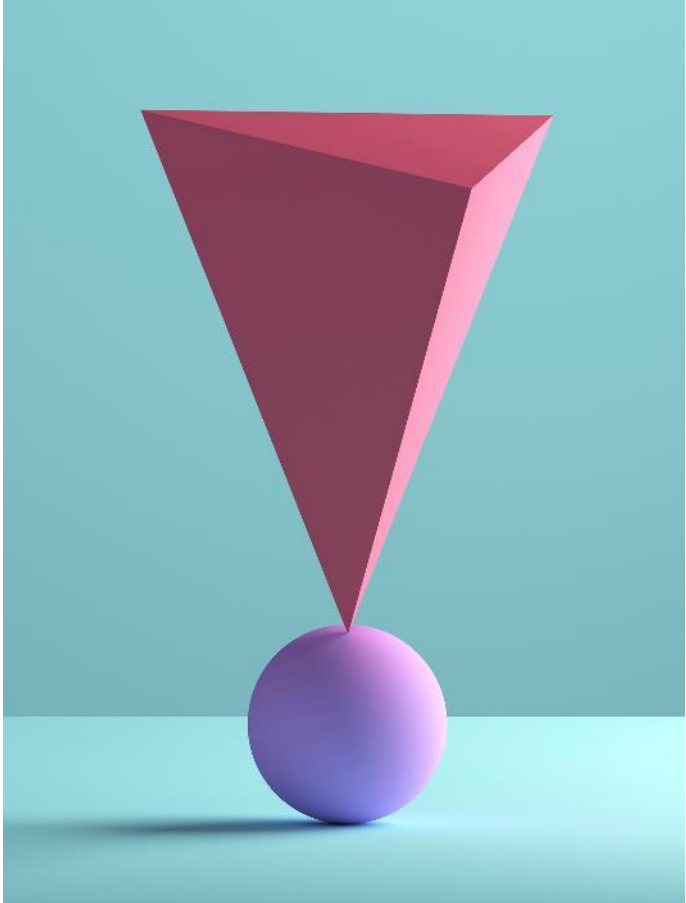


The Netherlands

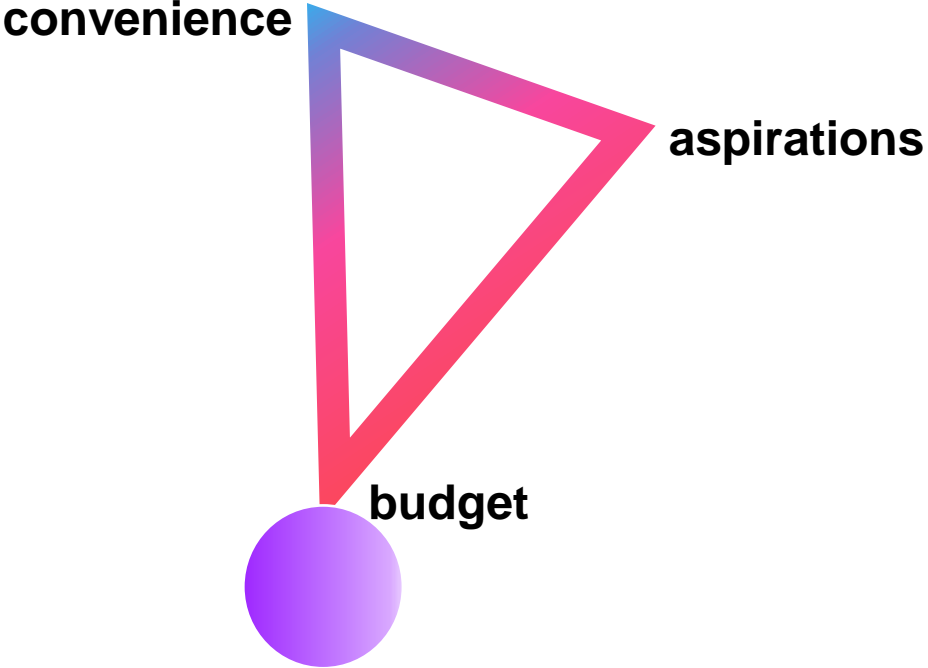
Help, er zit een gat in mijn gedrag

Het (on)gemak van betere boodschappen

Lenneke Schils



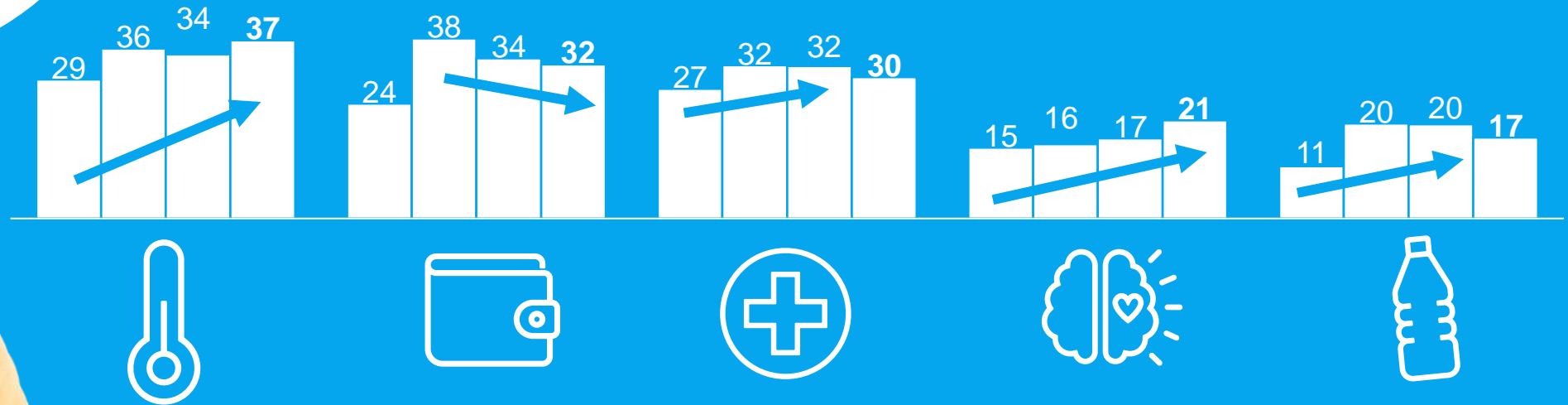
BERMUDA TRIANGLE





As budget concerns stabilize, other concerns grow

2 YEARS AGO TO TODAY Key societal concerns (%)





**Lowest
number of
struggling
shoppers**



**Shoppers
want to
spend
more**



**Price
reflex
declining**






































**More feel
they can
make a
difference**



***Better for*
motives
are
growing**

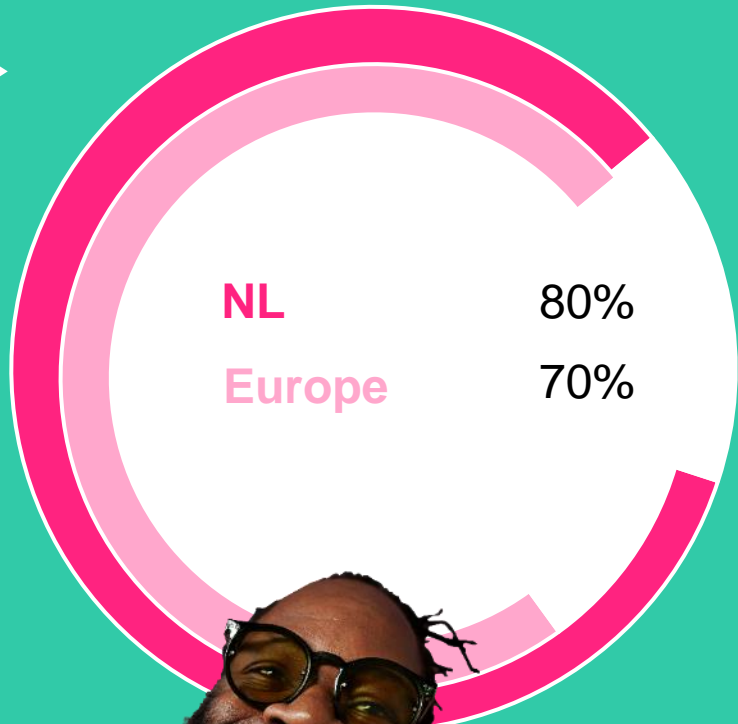
Health trigger for meals and drinks; sustainability for home and personal care

Main reason to change (purchasing) behavior

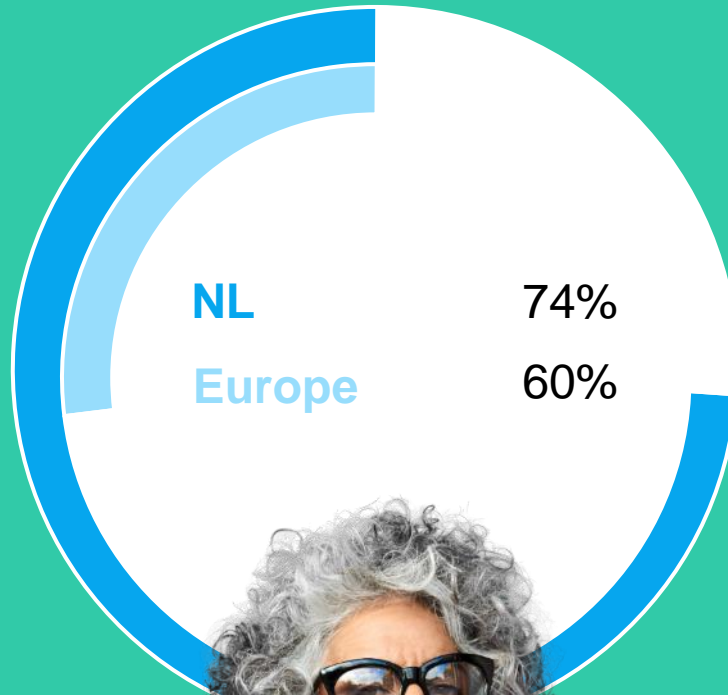
		#1	#2	#3	#4
	Breakfast				
	Main meal				
	Snacking				
	Drinks				
	Home cleaning				
	Laundry				
	Personal care				

“I’m doing well....”

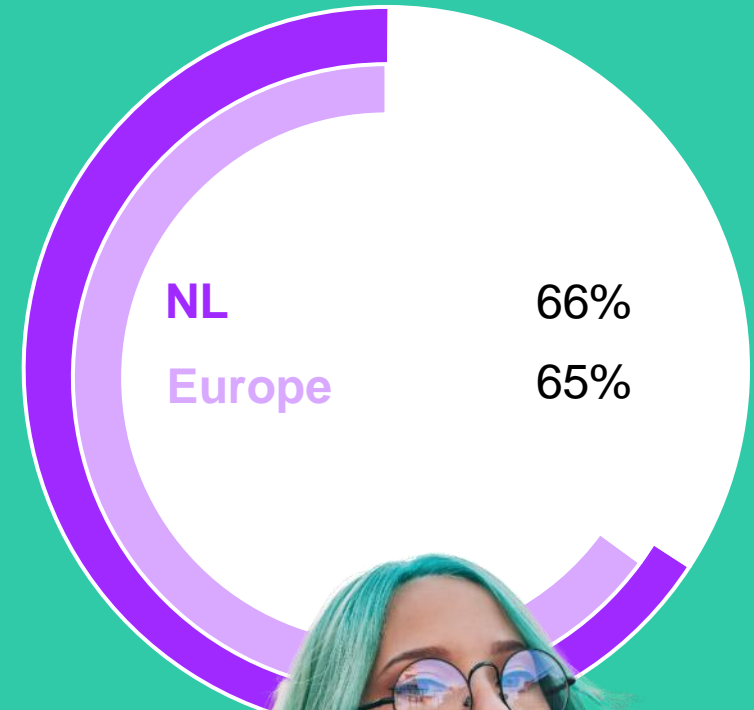
Mentally



Physically



Sustainably



Source: WCWD NL '24



Who is responsible?

Healthy living

Sustainable living

Individual

Government

Brands

Retailers

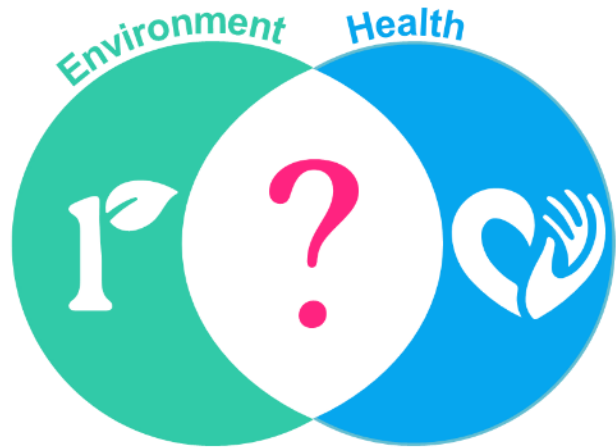
Brands

Government

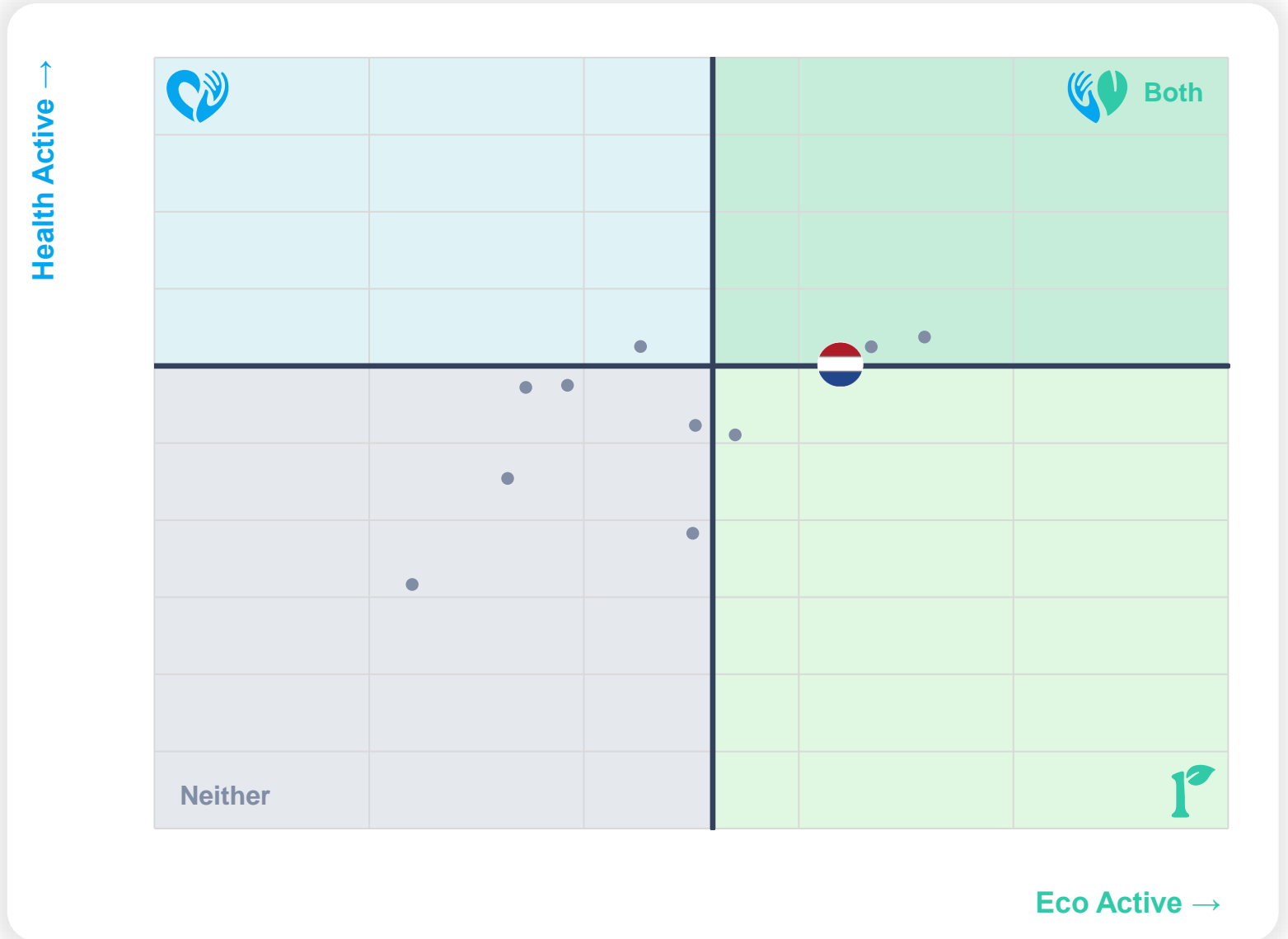
Individual

Retailers

Dutch shoppers care and act



**1 in 6
is both
eco- & health
active**



Key environmental concerns

1 **Climate change**

2 Water pollution

3 **Deforestation**

4 Air pollution

5 Plastic waste

Concerns & buying behavior converge

Products and companies that link with climate change and biodiversity are on the rise

% bought often / occasionally (ix versus last year)

Product / company is carbon neutral



Product / company protects biodiversity



Product has official certifications



Fully vegan products



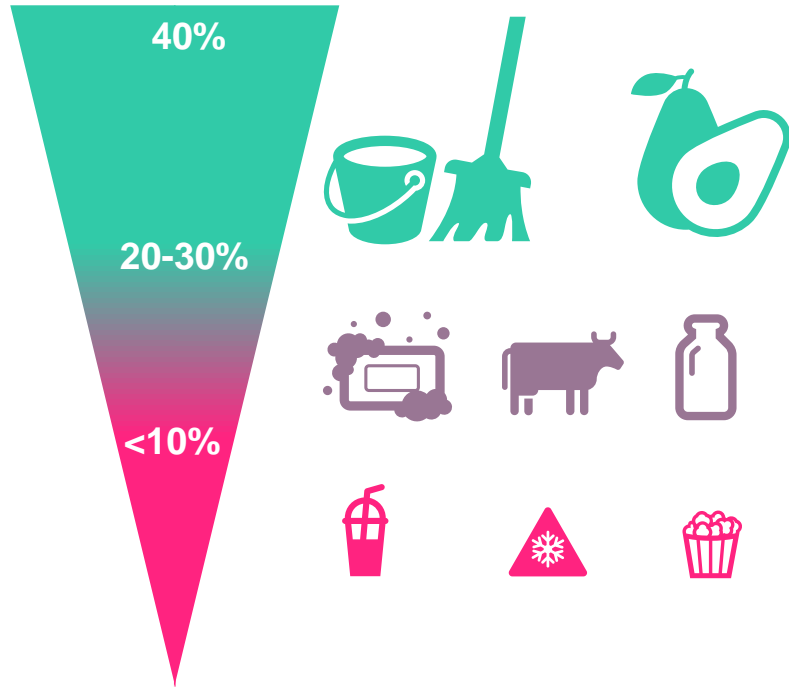
Meat / dairy alternatives




Locally sourced ingredients



Categories most recognized for sustainability efforts





**3 out of 4
can't name a
sustainable
food/drinks/care brand**

Source: WCWD '24 NL

Key health concerns

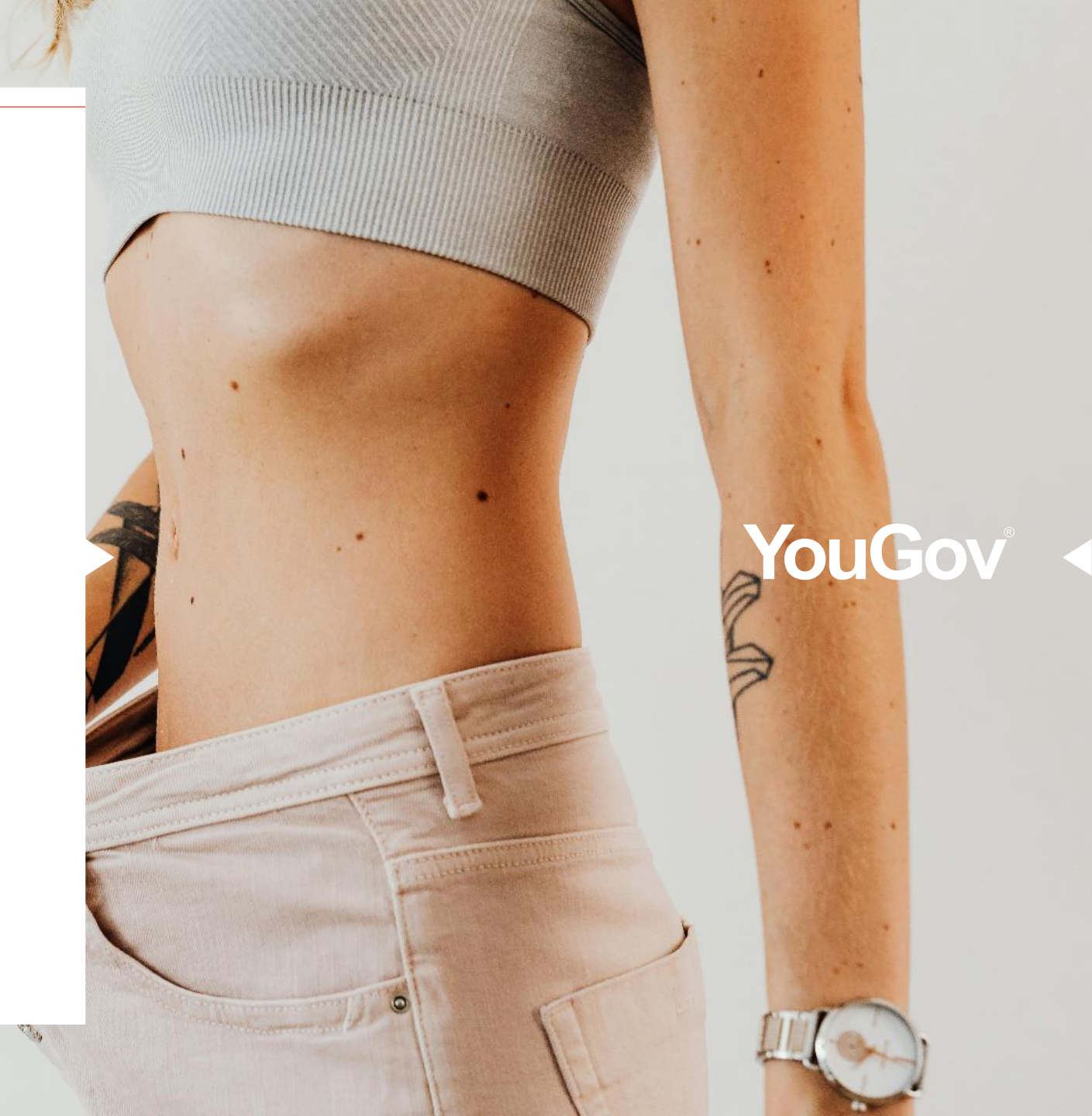
1 High blood pressure

2 Dementia

3 Insomnia

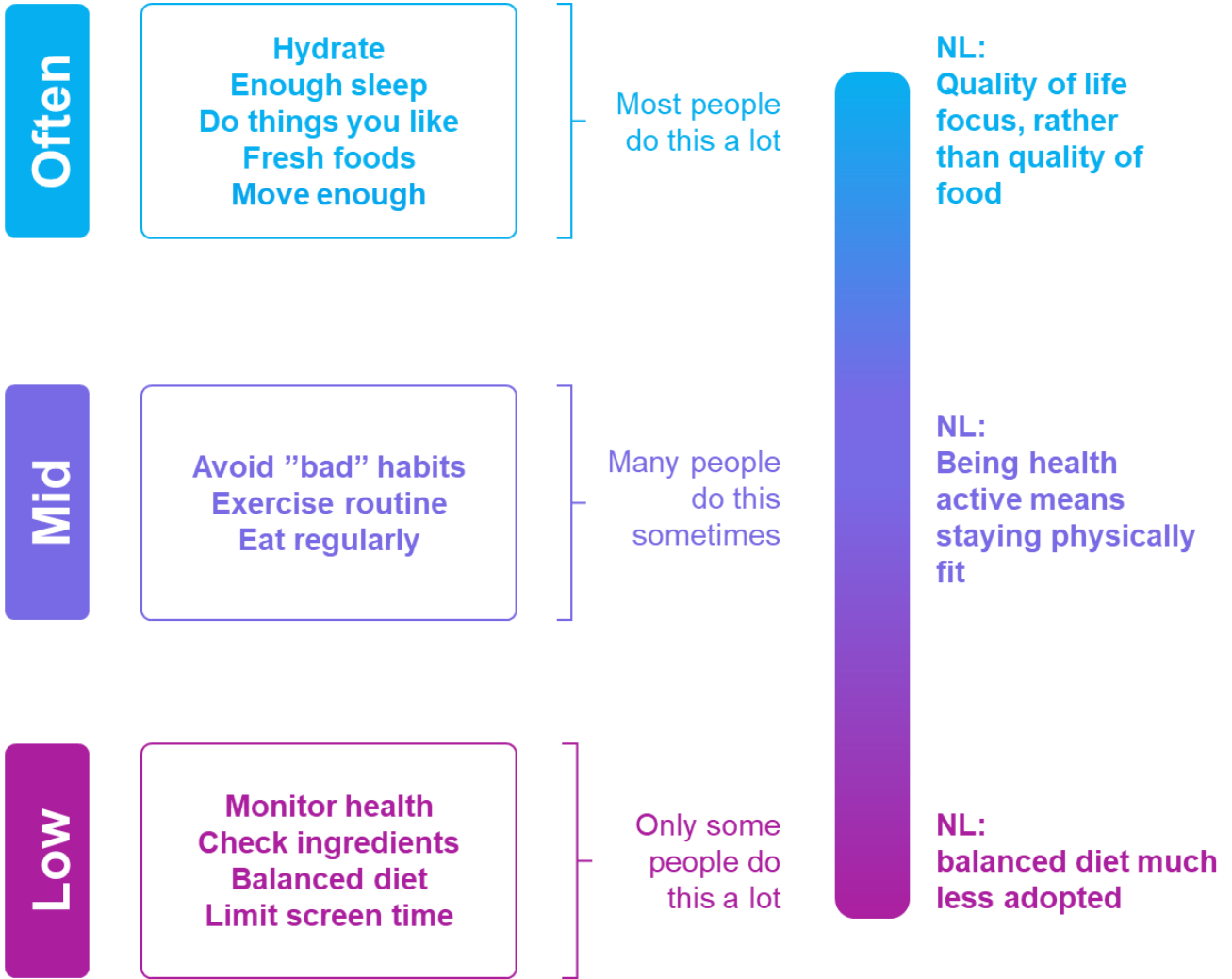
4 **Diabetes**

5 **Air pollen allergy**

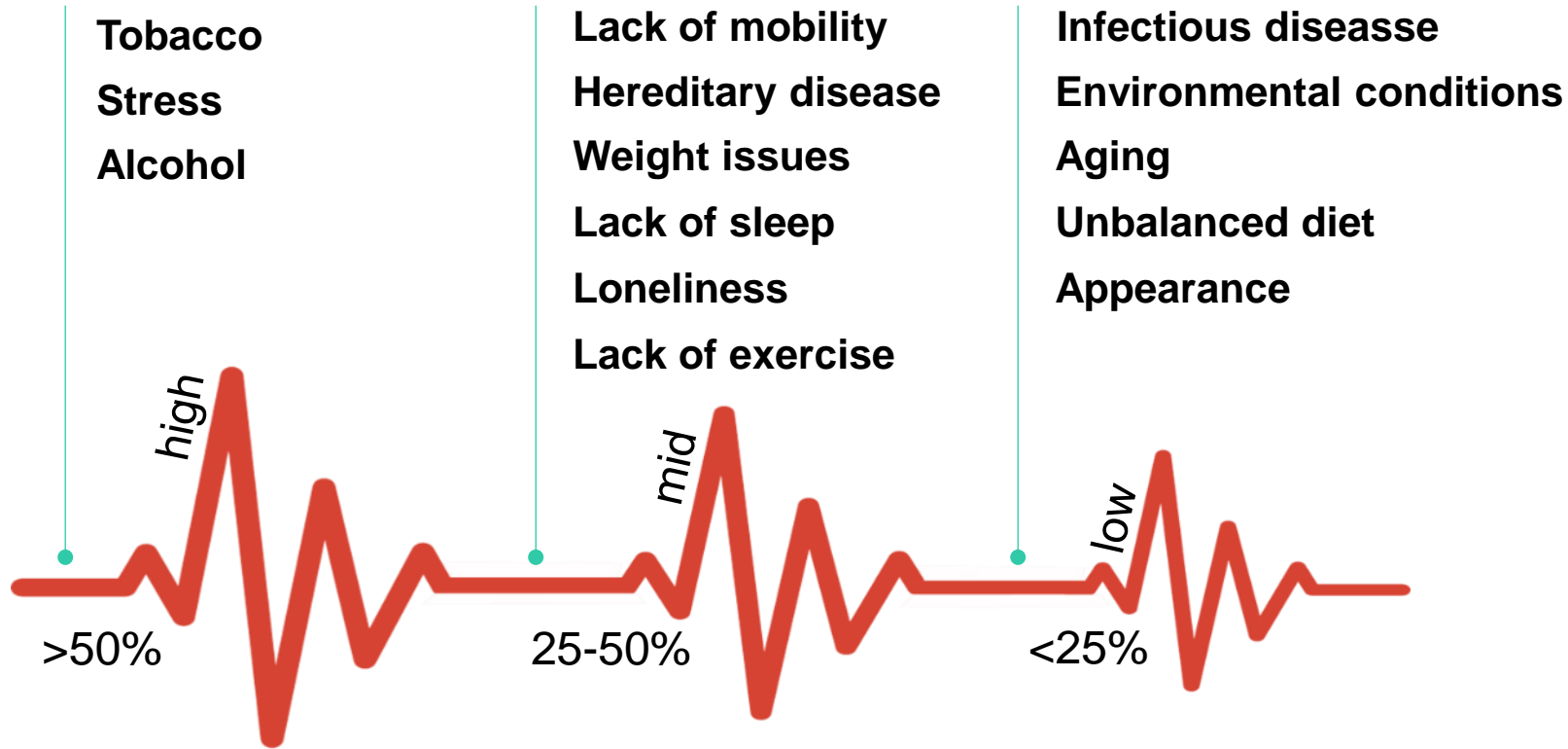




Common health practices



What affects health?



Practices to reduce stress are less of a habit



33% does not do any of the below (EU 20%)
Fixes recurred to less than elsewhere

1 in 3					1 in 5
	sleep	tobacco	alcohol	screen time	

1 in 10						1 in 20
	herbal tea	mindfulness	prescription medication	natural remedies	lavender spray	

Top 10 activities to maintain a healthy weight

It's all about the small picture



Treats are a part of the good life

Dutch snack more thoughtfully

62% (61%)

"It is important to treat myself regularly"



31% (40%)

"I use treats to cheer me up"
(50% among up to 35 yr)



57% (41%)

"If I have an unhealthy treat, I make sure it's really worth it"



33% (36%)

"If I have an unhealthy treat, I compensate"



Top 5 most harmful products

1

Sugared beverages

2

Energy drinks

3

Processed foods

4

Artificial sweeteners / flavours

5

CBD oil / infusion



Actives do spend their money with care



Category

Carbonated soft drinks

Plant-based beverages

Meat alternatives

Cola

Candy bars

Reform/diet products

Segment value share

Eco-Actives
€88

Eco-Actives
€33

Eco-Actives
€74

Health-Actives
€60

Health-Actives
€26

Health-Actives
€105

Spend per buyer

Eco-Dismissers
€161

Eco-Dismissers
€25

Eco-Dismissers
€45

Health-Passives
€92

Health-Passives
€29

Health-Passives
€85

With clear brand preferences

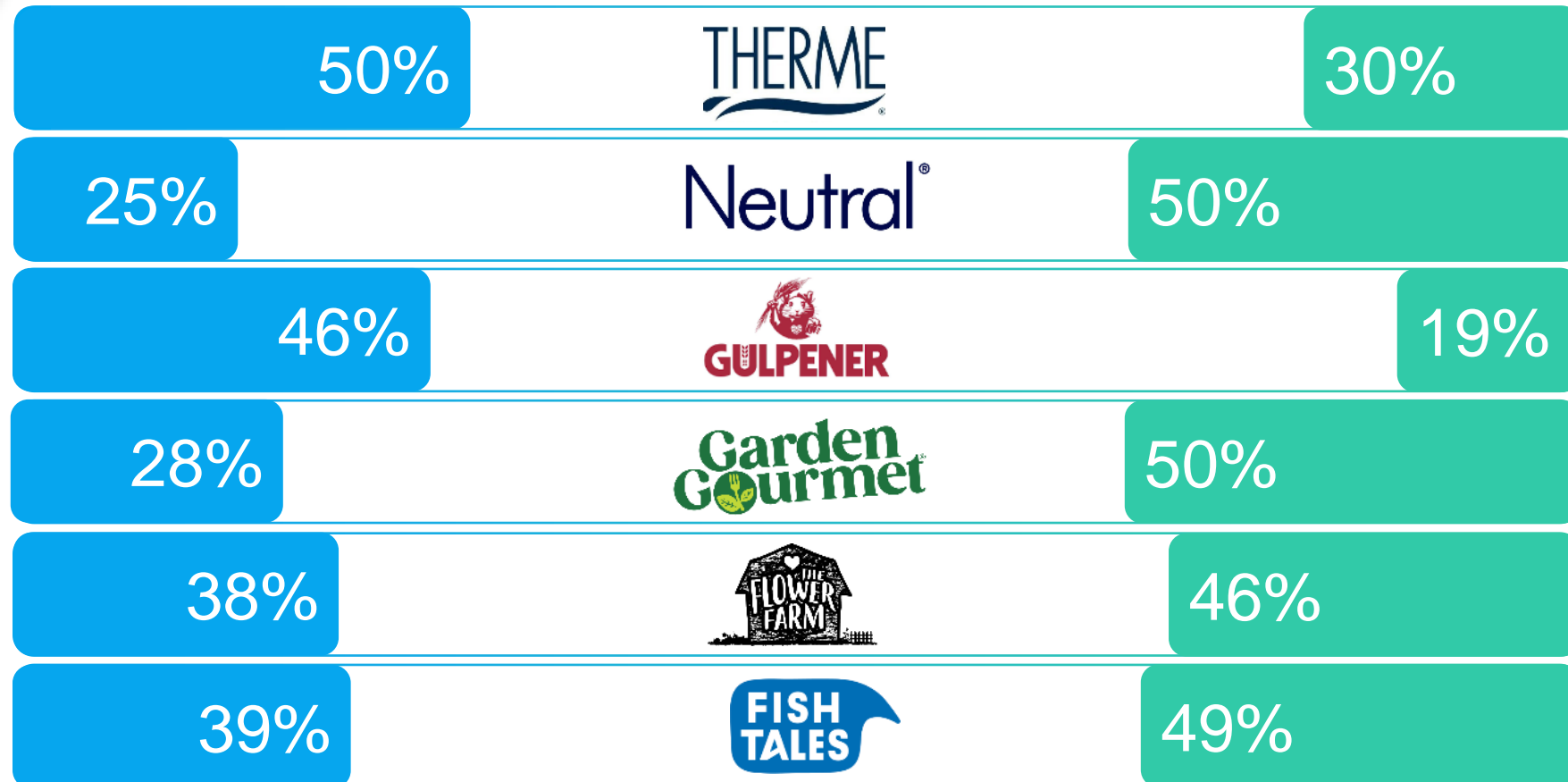


HEALTH ACTIVES

ECO ACTIVES



Brand value share % actives





1
Rather just
buy what
they need



2
Wholesome
diet less in
scope



3
Brand
preference
low

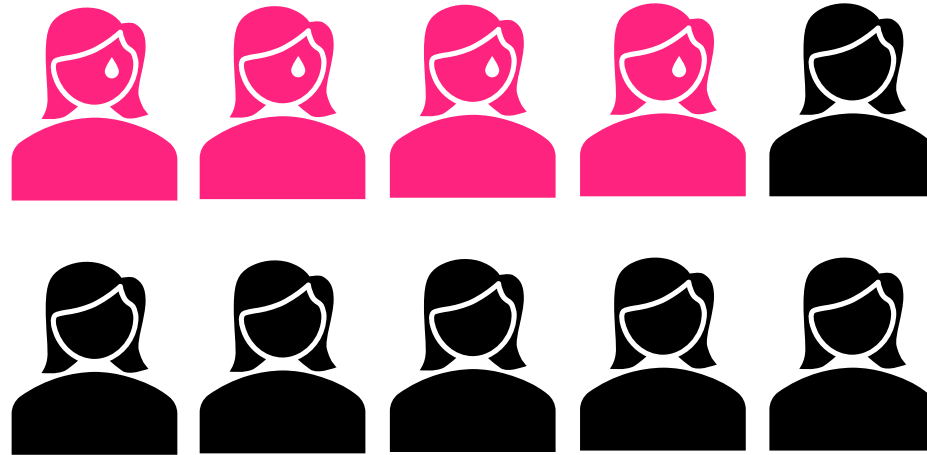


4
Mental
health
activation
lagging



5
Efforts not
easily
recognized

Are shoppers satisfied with retailers helping them achieve a “better for” lifestyle?



43% dissatisfied with how retailers help them live a **healthy** lifestyle

38% dissatisfied with how retailers help them live a **sustainable** lifestyle



Value, trust and confidence are key barriers

Product quality / functionality
not (really) the issue



Too expensive



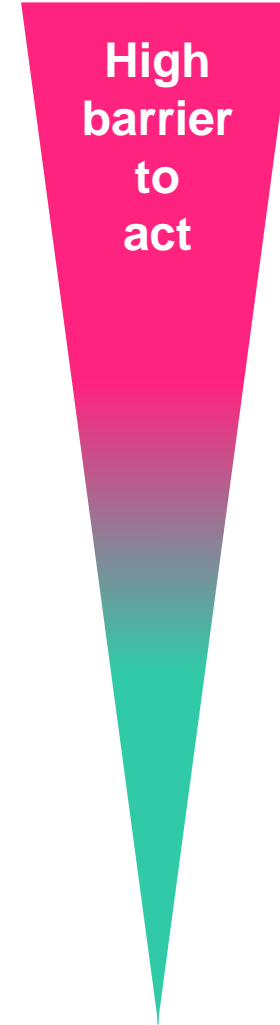
Don't trust



I'm confused



Less quality



Too expensive



Not an expert



Hard to find



Less quality





Good Food, Good Mood

Eco-health connection

Dutch go for details

Make it tangible

Rewarding not tempting

In the know

Money well spent

Thank you

Living Consumer Intelligence | yougov.com/business

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