Eden McCallum Consumer Survey

Q3 Consumer Sentiment: United Kingdom

Published Sept 2025

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Summary

Sentiment:

- Overall, optimism about the future remains higher than pessimism (46% vs. 34%), led by younger age groups (58% positive)
- However, overall pessimism has increased 3ppt in the last year, though not back to 2022 levels (38%)
- *On global/country level issues:*
  - Economic concerns rose sharply (though still below 2022 levels), with the domestic economy (75% of respondents concerned / very concerned) being the leading concern in the UK, and the global economy the fourth (65%)
  - Conflict concerns are up (2nd most pressing concern) but stabilising, with crime the third main concern
- *On personal issues:*
  - Negative sentiment is broadly reducing across all issues
  - Concerns about ability to spend and to save still dominate, but are falling even with the broader negative sentiment over domestic / global economies

Spend:

- In Essentials categories, those who increased spend outnumbered those who decreased spend, while the opposite was true in Discretionary categories (except Child & Baby)
  - In Essentials, increased spend was driven by increased prices
  - In Discretionary categories, decreased spend was driven by reduced consumption (including stopping spend altogether) with price relatively less important
- In 2025, a greater proportion increased their spend than in all previous years across all categories
- Similarly, fewer respondents reduced their spend in all categories than in all previous years

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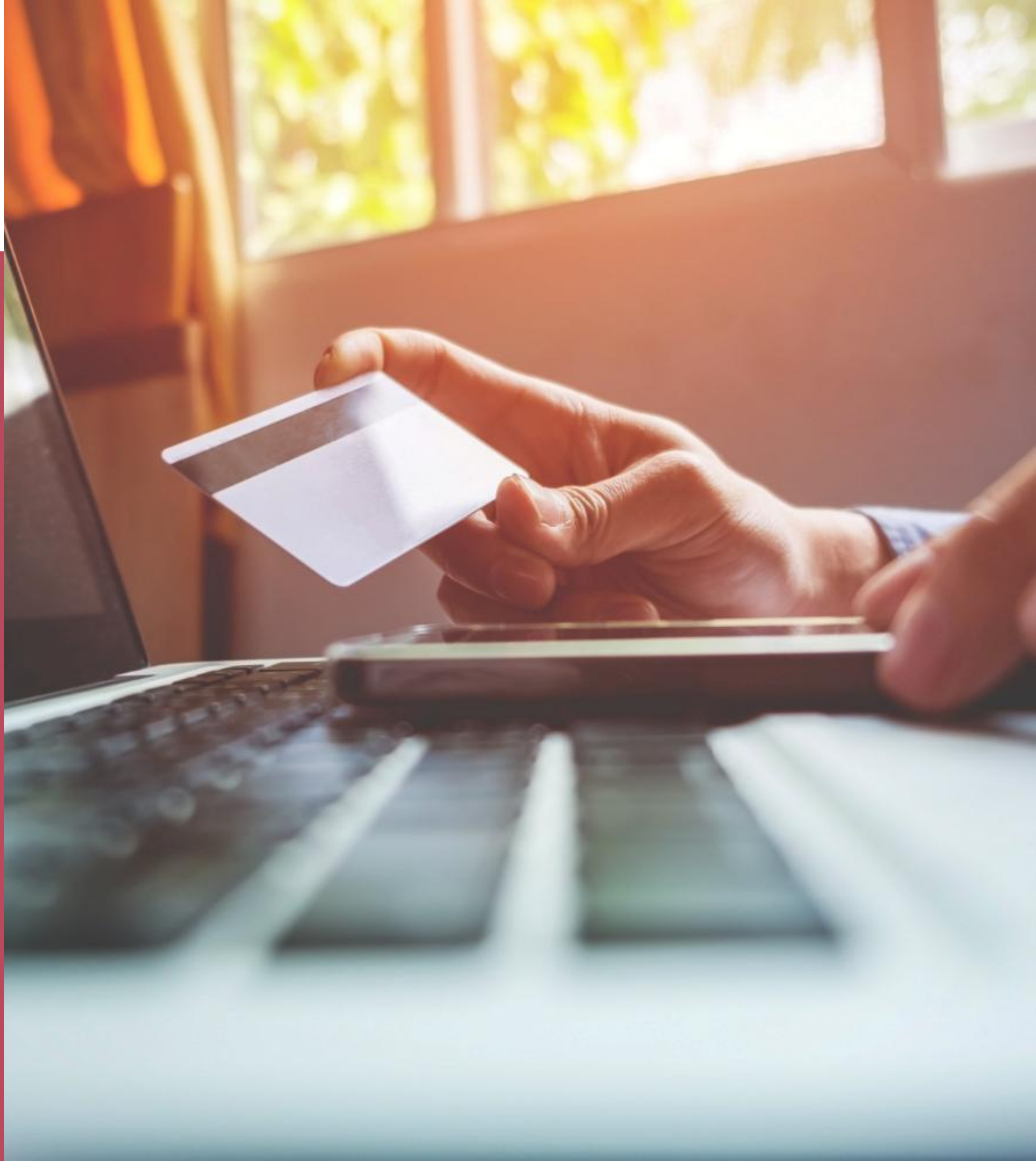
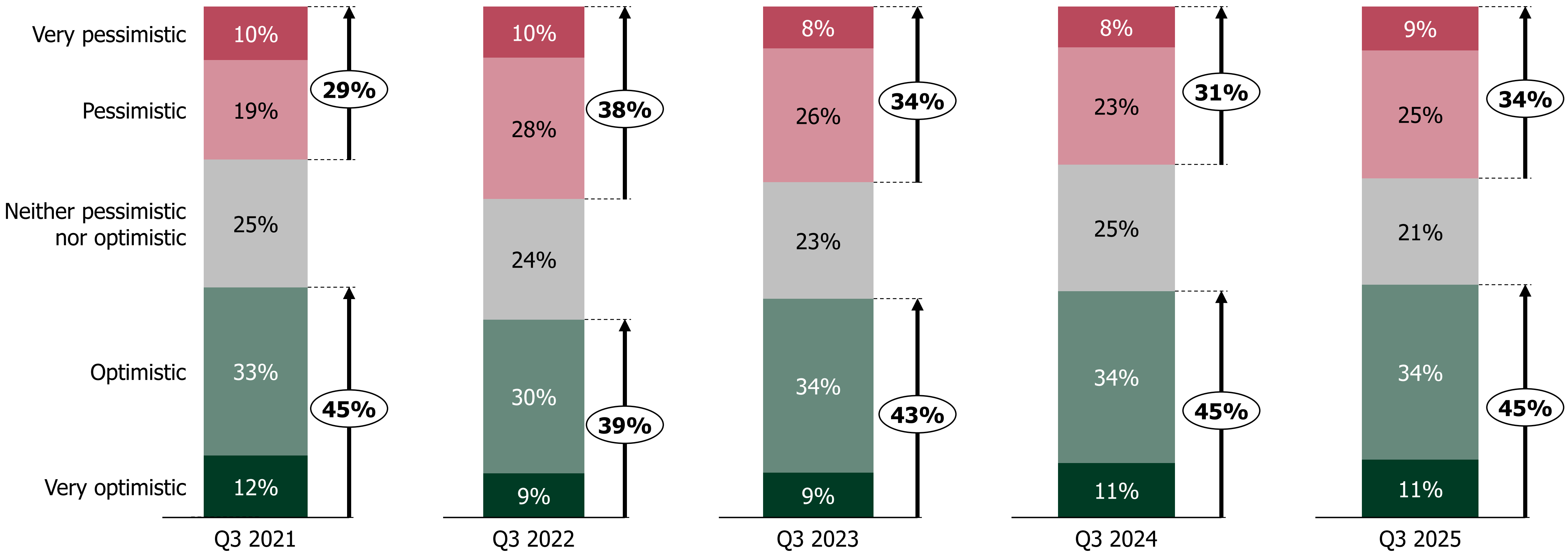


Although 45% of respondents feel optimistic about the future, levels of pessimism are increasing, though not yet at 2022 levels

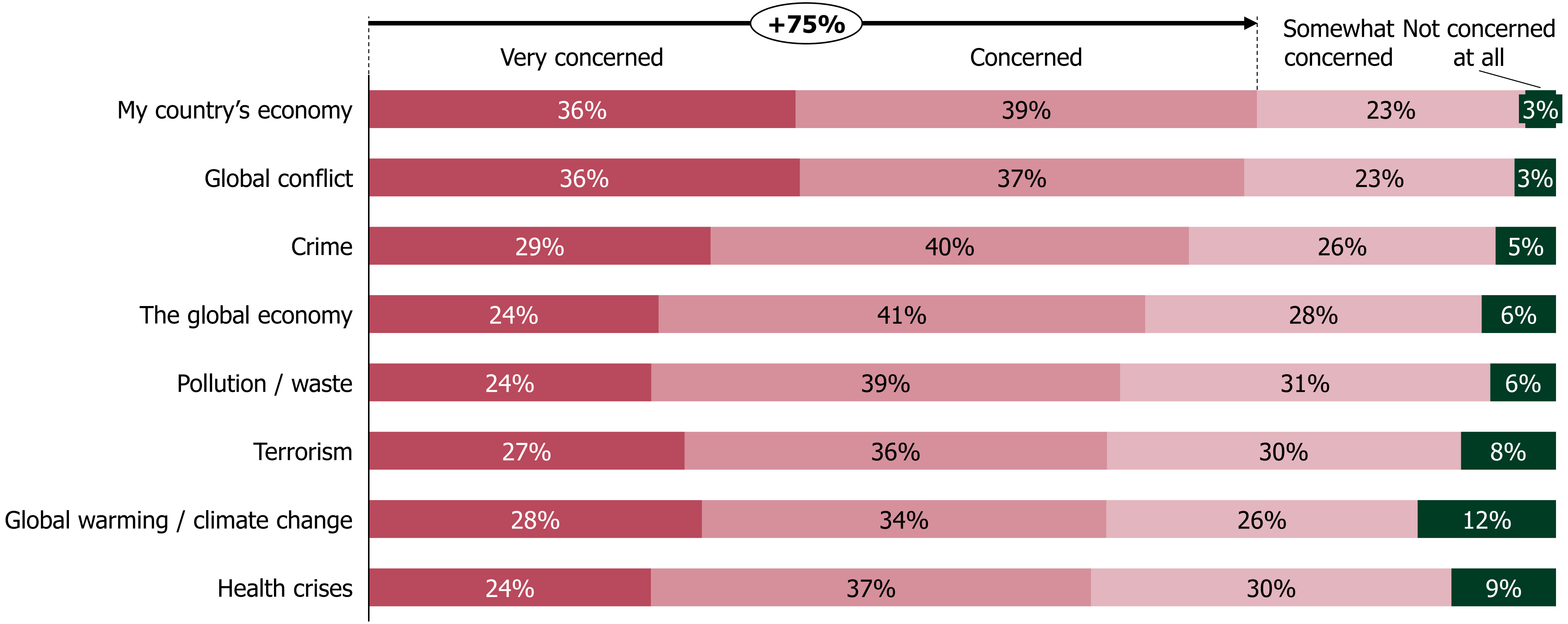
RESPONDENTS' VIEWS ON HOW THEY FEEL ABOUT THE FUTURE OVERALL, Q3 2021 – Q3 2025



Note: October 2021 n = 1012, August 2022 n = 3047, July 2023 n = 1571, July 2024 n = 1984, August 2025 n = 2173; 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

There is widespread concern on all issues facing the country and world

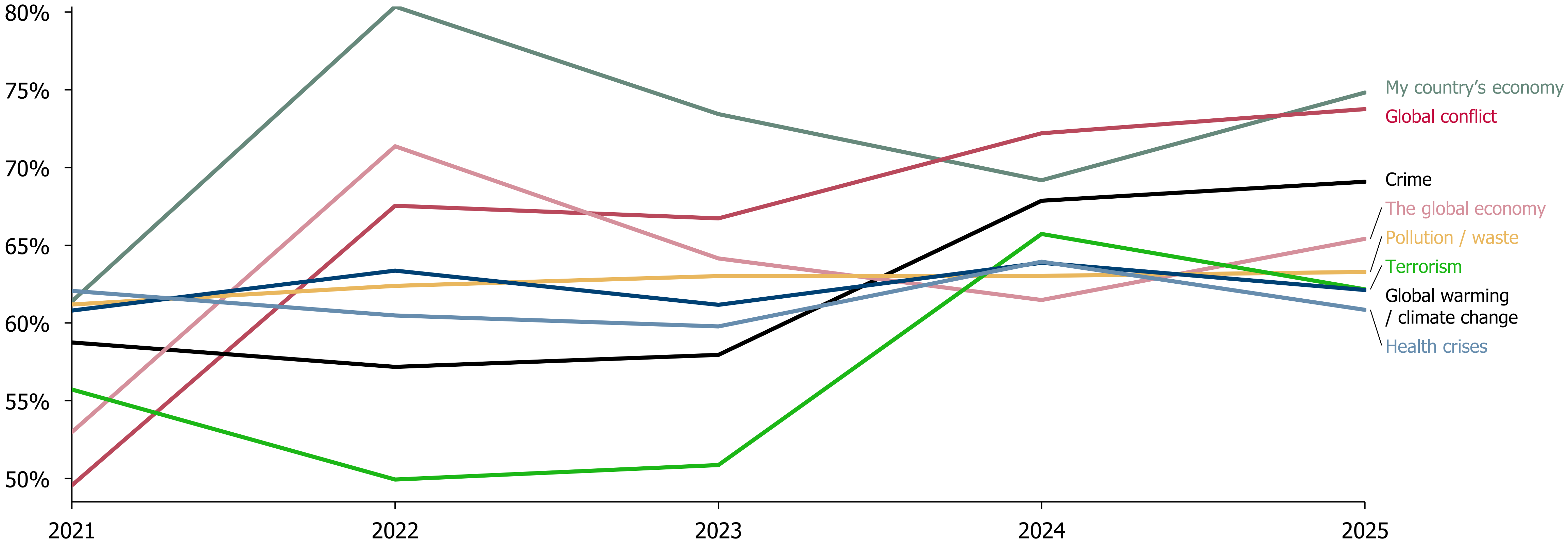
RESPONDENTS' VIEWS ON ISSUES FACING COUNTRY AND WORLD, Q3 2025



Note: August 2025 n = 2154-2177; 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

Economic concerns have risen sharply since 2024 though not yet to 2022 levels; worries about crime and conflict are up since 2022 though starting to stabilise

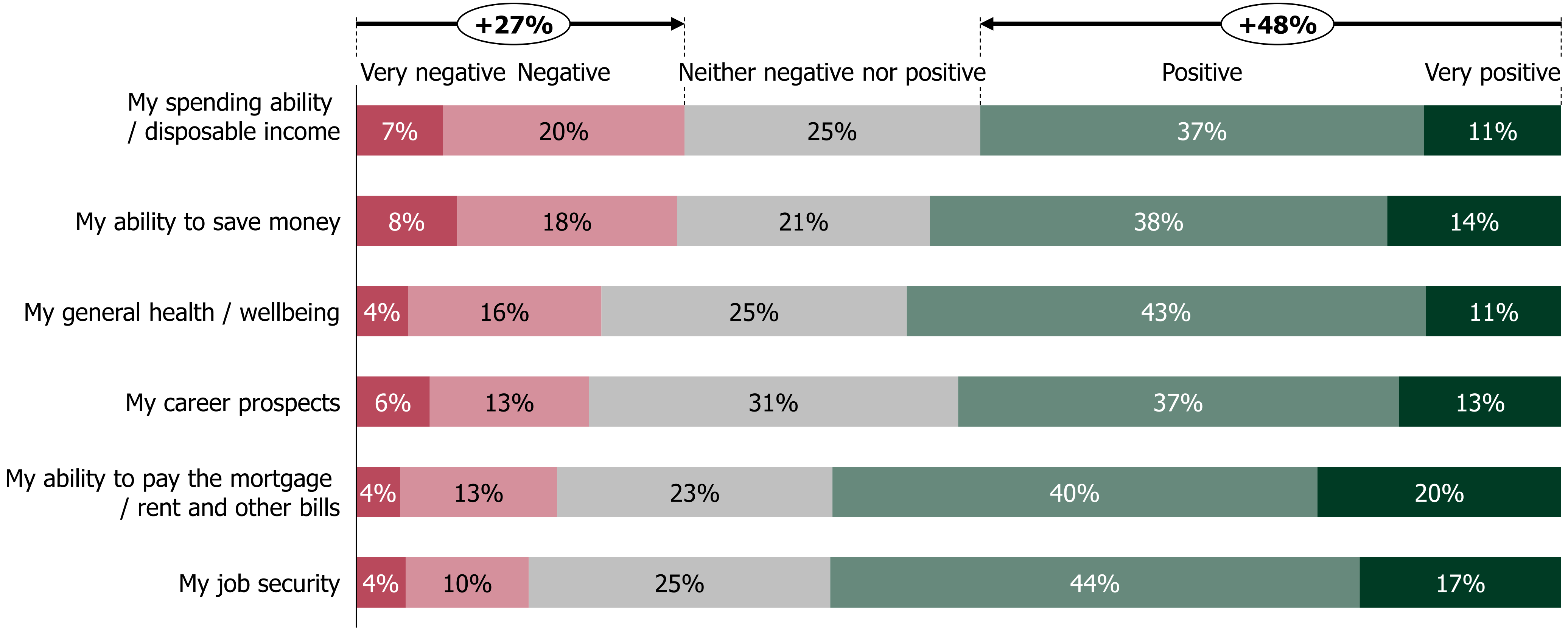
SHARE OF RESPONDENTS WHO WERE 'VERY CONCERNED' OR 'CONCERNED', Q3 2021 – 2025



Note: October 2021 n = 994-1008, October 2022 n = 3052-3079, July 2023 n = 1554-1567, July 2024 n = 1968-1998, August 2025 n = 2154-2177; 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'.
Source: Eden McCallum & Dynata surveys

On personal issues, positive sentiment outweighs negative across the board; but over 1/4 of respondents feel negative about being able to spend and save

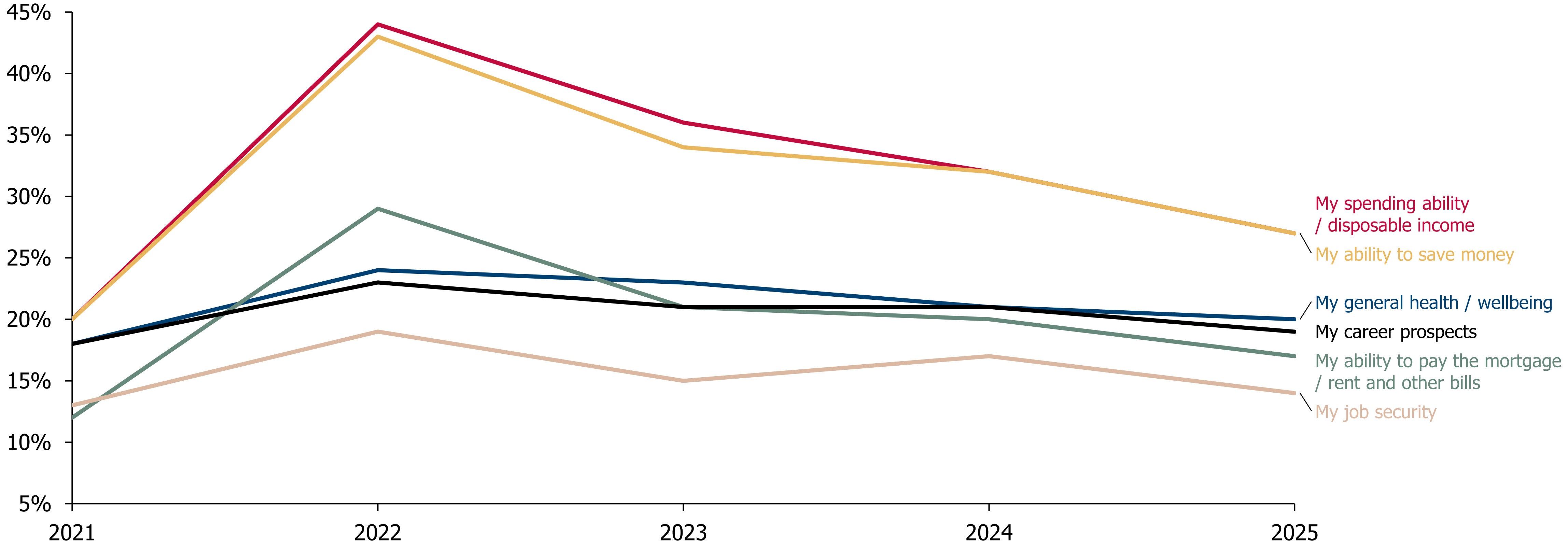
RESPONDENTS' VIEWS ON PERSONAL ISSUES FACED, Q3 2025



Note: August 2025 n = 1131-2174; 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

Concern over personal issues continue to reduce, even for spending and saving ability despite the rise in concern over the domestic and global economy

SHARE OF RESPONDENTS WHO WERE 'VERY NEGATIVE' OR 'NEGATIVE', Q3 2021 – 2025



Note: October 2021 n = 1012, October 2022 n = 1533-3088, July 2023 n = 721-1576, July 2024 n = 979-1994, August 2025 n = 1131-2174; 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

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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

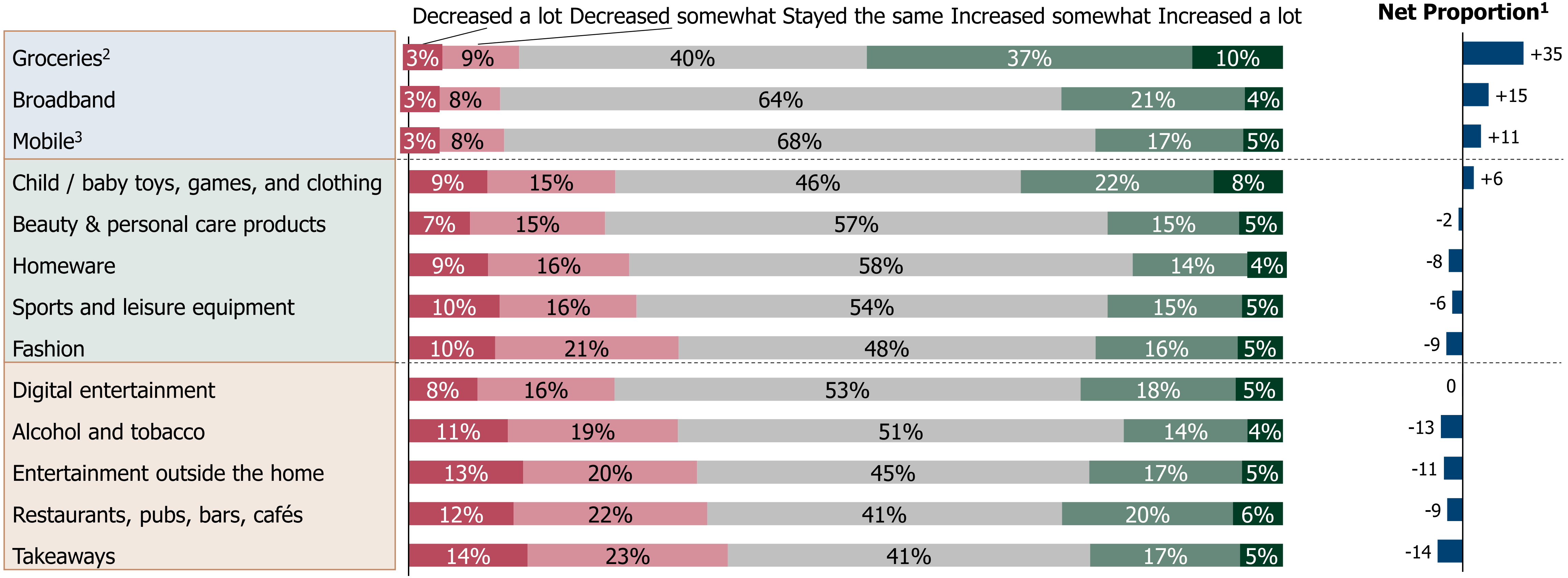
GROUPING OF SPEND CATEGORIES

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 spend in all Essentials categories; in discretionary subcategories, the opposite was typically true excepting Child/Baby

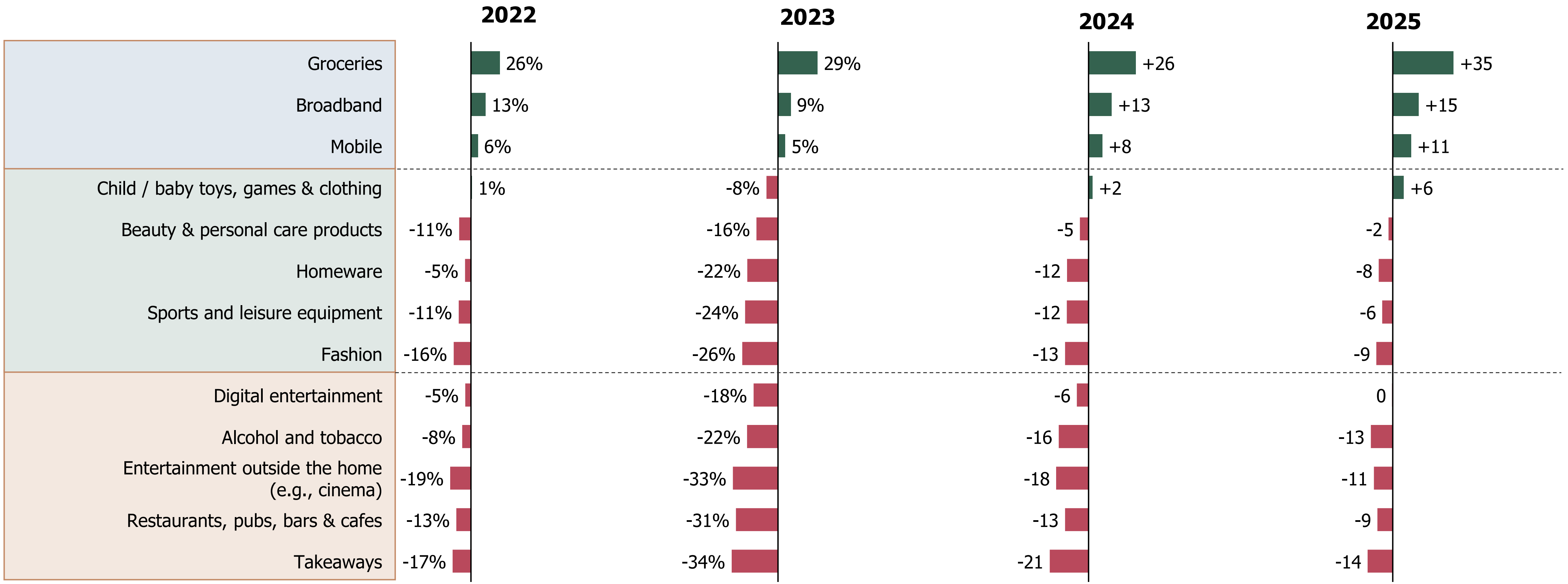
% OF CONSUMERS REPORTING CHANGE IN SPEND OVER PAST 3 MONTHS, BY SUBCATEGORY, Q3 2025



Note: August 2025 n = 1074-2152; 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

Consumers increasing spend has consistently outnumbered those reducing spend in Essentials over time; in discretionary categories, consistently more have reduced their spend except Child/baby where the picture is more mixed

NET PROPORTION[1] REPORTING CHANGE IN SPEND OVER PAST 3 MONTHS, BY SUBCATEGORY, 2022-2025

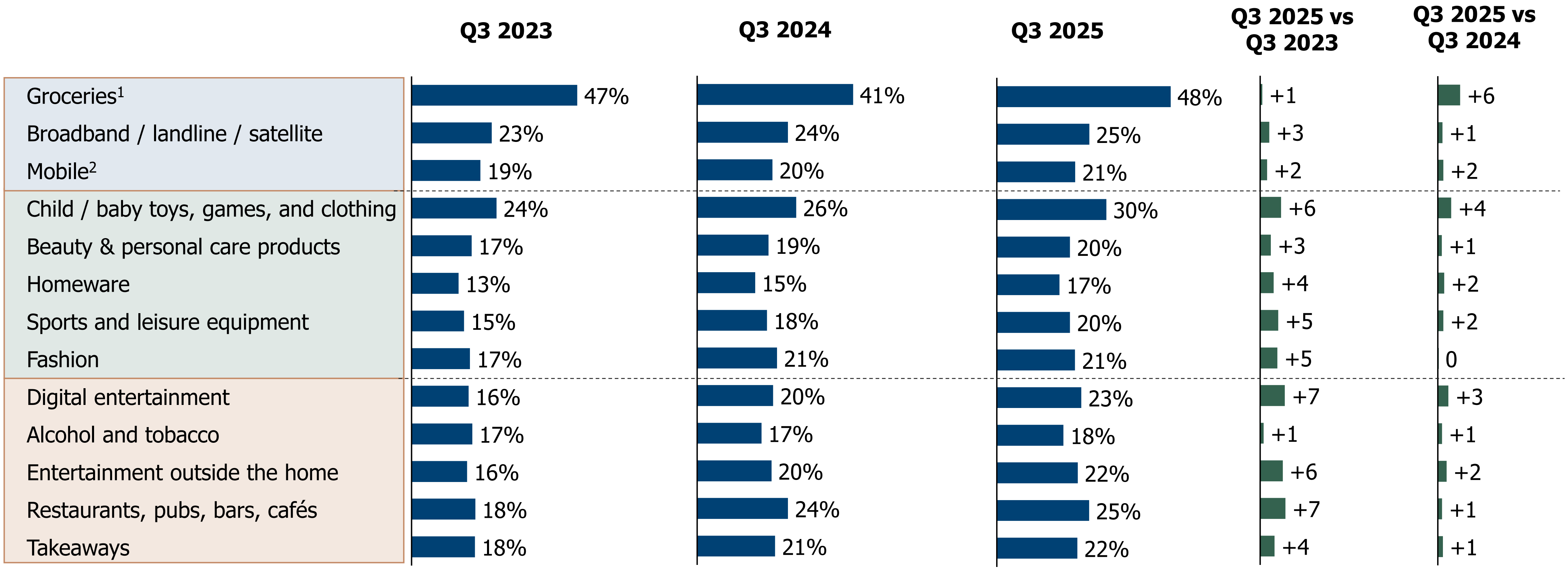


Note: October 2022 n = 1546-3061, July 2023 n = 706-1554, July 2024 n = 950-1960, August 2025 n = 1074-2152; Question: *'How has your spending in the following areas changed in the past 3 months?';* (1) Net Proportion = percentage of 'Increased a lot' and 'Increased somewhat' responses minus the percentage 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

The share of respondents who increased spending in 2025 is up on previous years in most categories

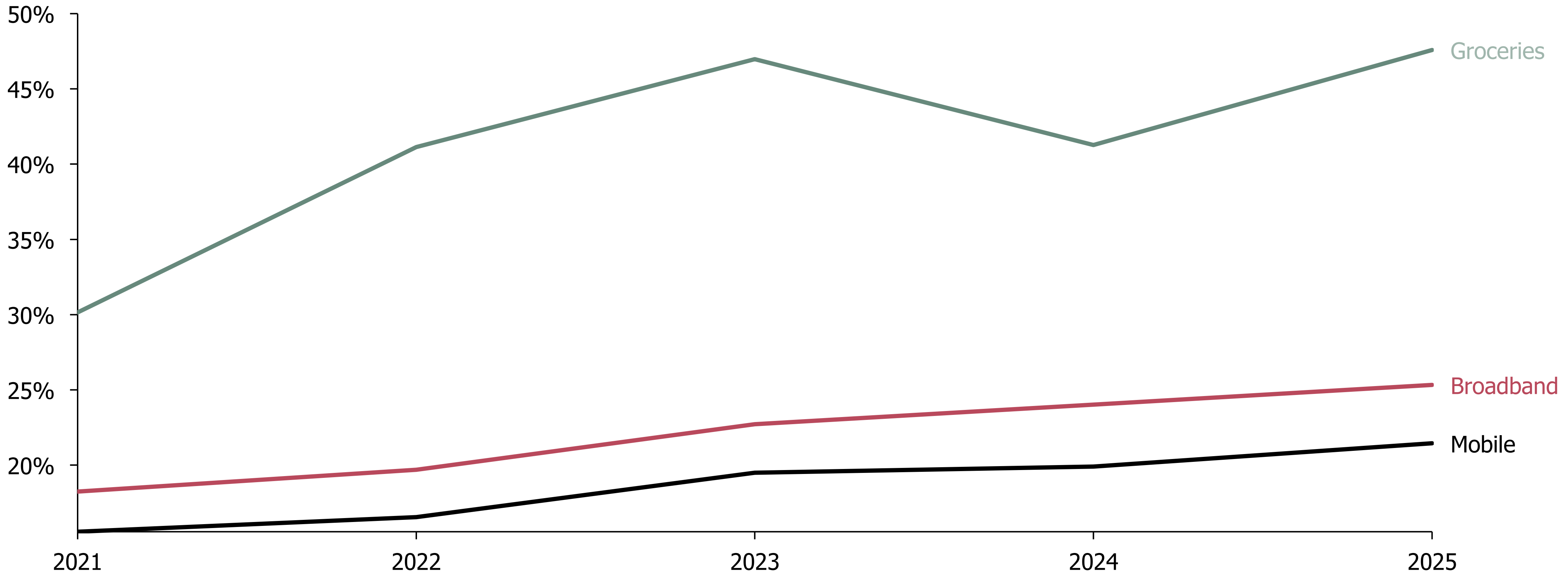
% OF RESPONDENTS WHO INCREASED THEIR SPEND BY CATEGORY, Q3 2023 – 2025



Note: July 2023 n = 706-1554, July 2024 n = 950-1960, August 2025 n = 1074-2152; 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.
Source: Eden McCallum & Dynata surveys

The share of respondents who increased spending in 2025 is up on previous years in most categories [1/3]

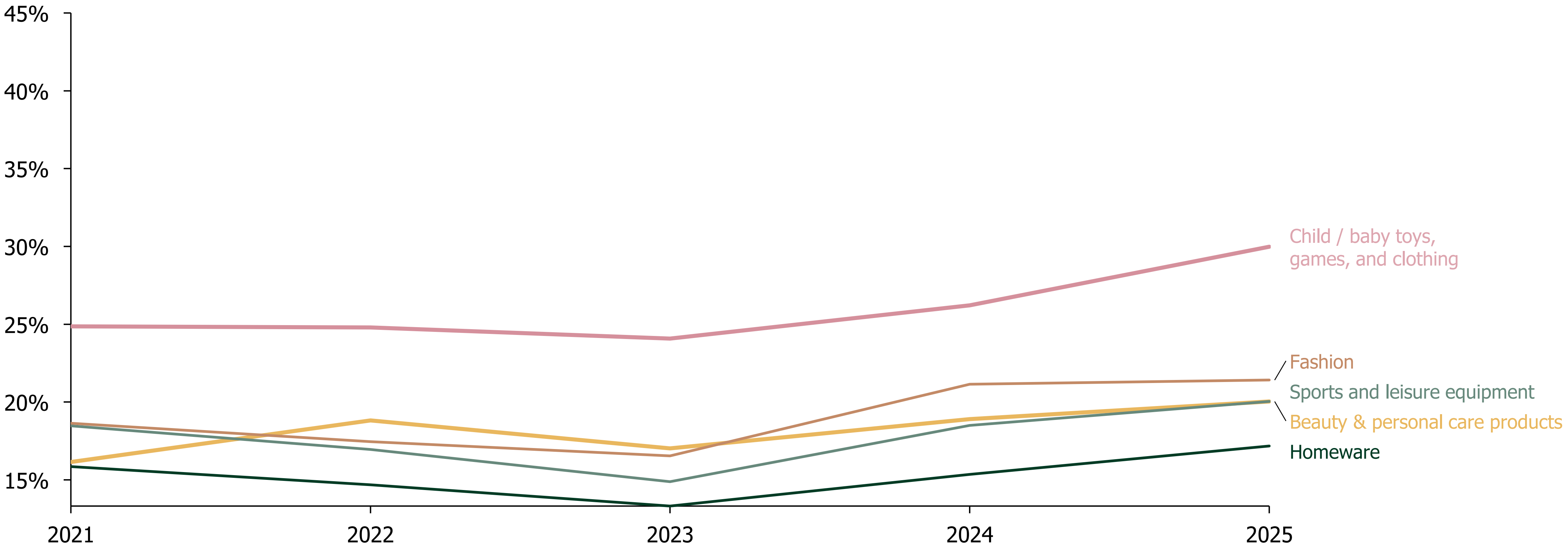
% OF RESPONDENTS WHO INCREASED THEIR SPEND IN ESSENTIALS BY CATEGORY, Q3 2021 – 2025



Note: October 2021 n = 1023, October 2022 n = 1546-3061, July 2023 n = 706-1554, July 2024 n = 950-1960, August 2025 n = 1074-2152; 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.
Source: Eden McCallum & Dynata surveys

The share of respondents who increased spending in 2025 is up on previous years in most categories [2/3]

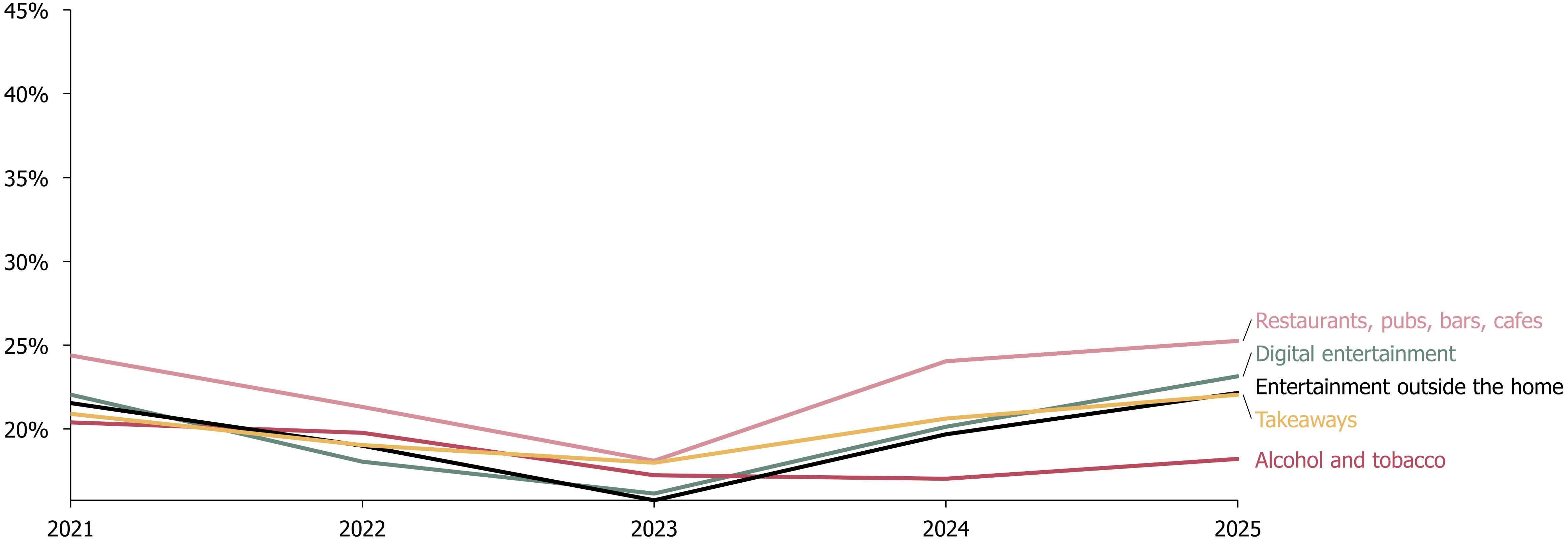
% OF RESPONDENTS WHO INCREASED THEIR SPEND IN FASHION & HOME BY CATEGORY, Q3 2021 – 2025



Note: October 2021 n = 1023, October 2022 n = 1546-3061, July 2023 n = 706-1554, July 2024 n = 950-1960, August 2025 n = 1074-2152; 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.
Source: Eden McCallum & Dynata surveys

The share of respondents who increased spending in 2025 is up on previous years in most categories [3/3]

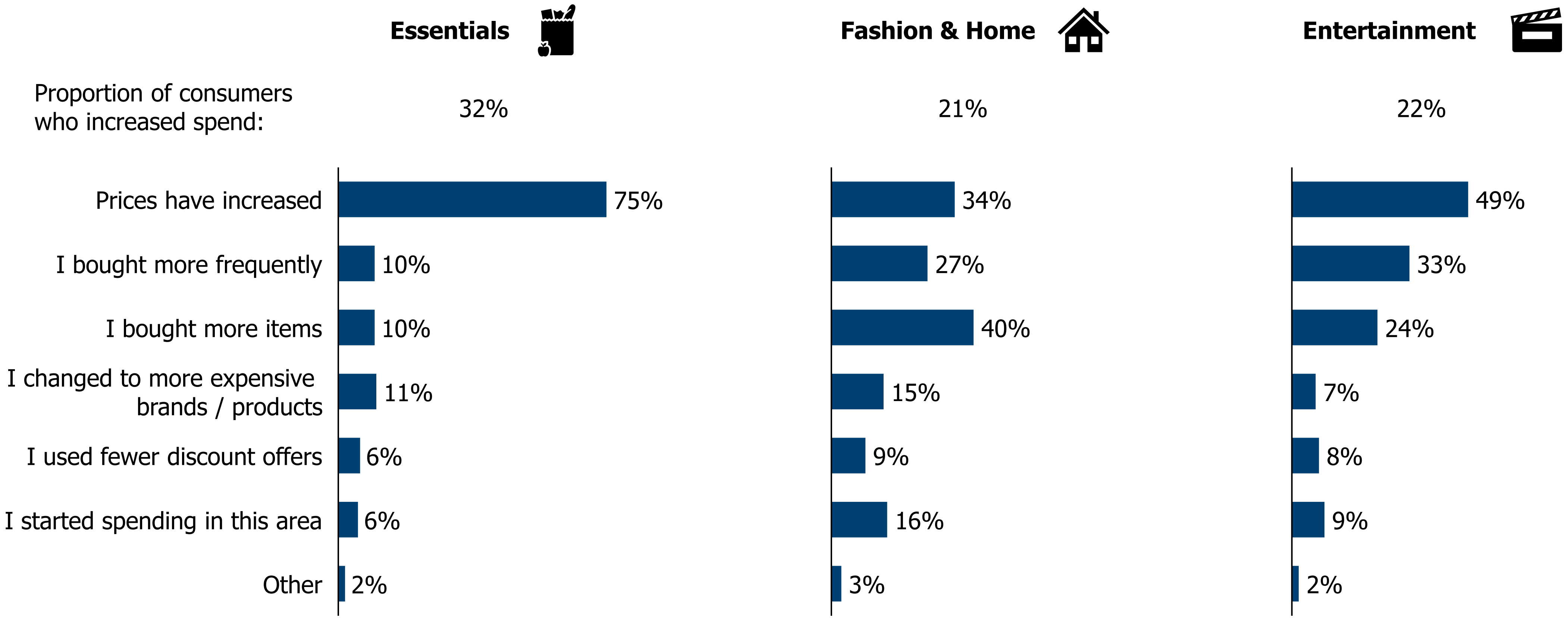
% OF RESPONDENTS WHO INCREASED THEIR SPEND IN ENTERTAINMENT BY CATEGORY, Q3 2021 – 2025



Note: October 2021 n = 1023, October 2022 n = 1546-3061, July 2023 n = 706-1554, July 2024 n = 950-1960, August 2025 n = 1074-2152; 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.
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 2025



Note: August 2025 n = 784-908; 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

KEY: Greater than 5ppt above av. / Less than 5ppt below av.

WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, Q3 2025

Essentials	Groceries[1]	Broadband	Mobile[2]	Average of Essentials
Proportion of consumers who increased spend:	48%	25%	21%	**32%**
Prices have increased	89%	75%	56%	75%
I bought more frequently	8%	10%	14%	10%
I bought more items	10%	6%	14%	10%
I changed to more expensive brands / products	4%	13%	17%	11%
I used fewer discount offers	3%	5%	11%	6%
I started spending in this area	2%	5%	11%	6%
Other	1%	1%	4%	2%

Note: August 2025 n = 268-353; 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 and price drives increased spend, in most categories price to a lesser extent

KEY: Greater than 5ppt above av. / Less than 5ppt below av.

WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, Q3 2025

Fashion & Home	Child / baby toys, games, and clothing	Beauty and personal care products	Homeware	Sports and leisure equipment	Fashion	Average of Fashion & Home
Proportion of consumers who increased spend:	30%	20%	17%	20%	21%	**21%**
Prices have increased	32%	42%	32%	28%	39%	34%
I bought more frequently	30%	20%	24%	26%	34%	27%
I bought more items	48%	31%	39%	40%	37%	40%
I changed to more expensive brands / products	11%	22%	13%	20%	7%	15%
I used fewer discount offers	10%	8%	10%	13%	6%	9%
I started spending in this area	15%	8%	20%	21%	14%	16%
Other	4%	2%	2%	1%	4%	3%

Note: August 2025 n = 147-224; 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 Entertainment, while price was the leading reason for increased spend, consumption also rose for many

KEY: Greater than 5ppt above av. / Less than 5ppt below av.

WAYS IN WHICH RESPONDENTS SPENT MORE IN LAST 3 MONTHS, Q3 2025

Entertainment	Digital entertainment	Alcohol and tobacco	Entertainment outside the home	Restaurants, pubs, bars, cafés	Takeaways	Average of Entertainment
Proportion of consumers who increased spend:	23%	18%	22%	25%	22%	**22%**
Prices have increased	47%	47%	48%	54%	49%	49%
I bought more frequently	29%	31%	27%	36%	43%	33%
I bought more items	39%	25%	14%	15%	25%	24%
I changed to more expensive brands / products	8%	11%	5%	5%	2%	7%
I used fewer discount offers	12%	6%	7%	4%	7%	8%
I started spending in this area	10%	7%	18%	7%	3%	9%
Other	1%	1%	3%	2%	3%	2%

Note: August 2025 n = 121-184; 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 share of respondents who decreased spending is down across all categories; discretionary categories are seeing the greatest drop in the last year

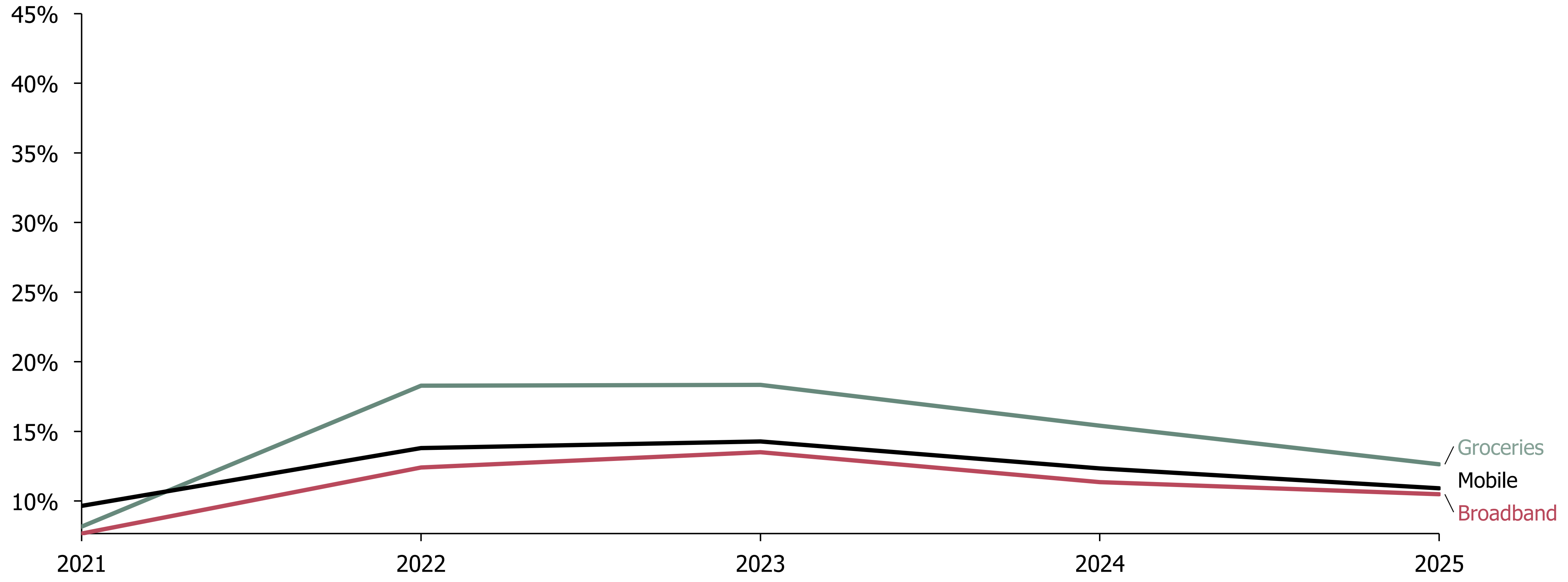
% OF RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE, Q3 2023 – 2025

	Q3 2023	Q3 2024	Q3 2025	Q3 2025 vs Q3 2023	Q3 2025 vs Q3 2024
Groceries[1]	18%	15%	13%	-6	-3
Broadband	14%	11%	10%	-3	-1
Mobile[2]	14%	12%	11%	-3	-1
Child / baby toys, games, and clothing	32%	24%	24%	-9	0
Beauty and personal care products	32%	24%	22%	-10	-1
Homeware	36%	27%	25%	-10	-2
Sports and leisure equipment	39%	30%	26%	-13	-4
Fashion	43%	34%	31%	-12	-3
Digital entertainment	34%	27%	24%	-10	-3
Alcohol and tobacco	40%	33%	31%	-9	-3
Entertainment outside the home	48%	38%	33%	-15	-5
Restaurants, pubs, bars, cafés	49%	37%	34%	-14	-3
Takeaways	52%	42%	37%	-15	-5

Note: July 2023 n = 706-1554, Jul 2024 n = 950-1960, August 2025 n = 1074-2152; 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.
Source: Eden McCallum & Dynata surveys

Over time, the share of respondents who decreased spending is down across all categories; discretionary categories are seeing the greatest drop in the last year [1/3]

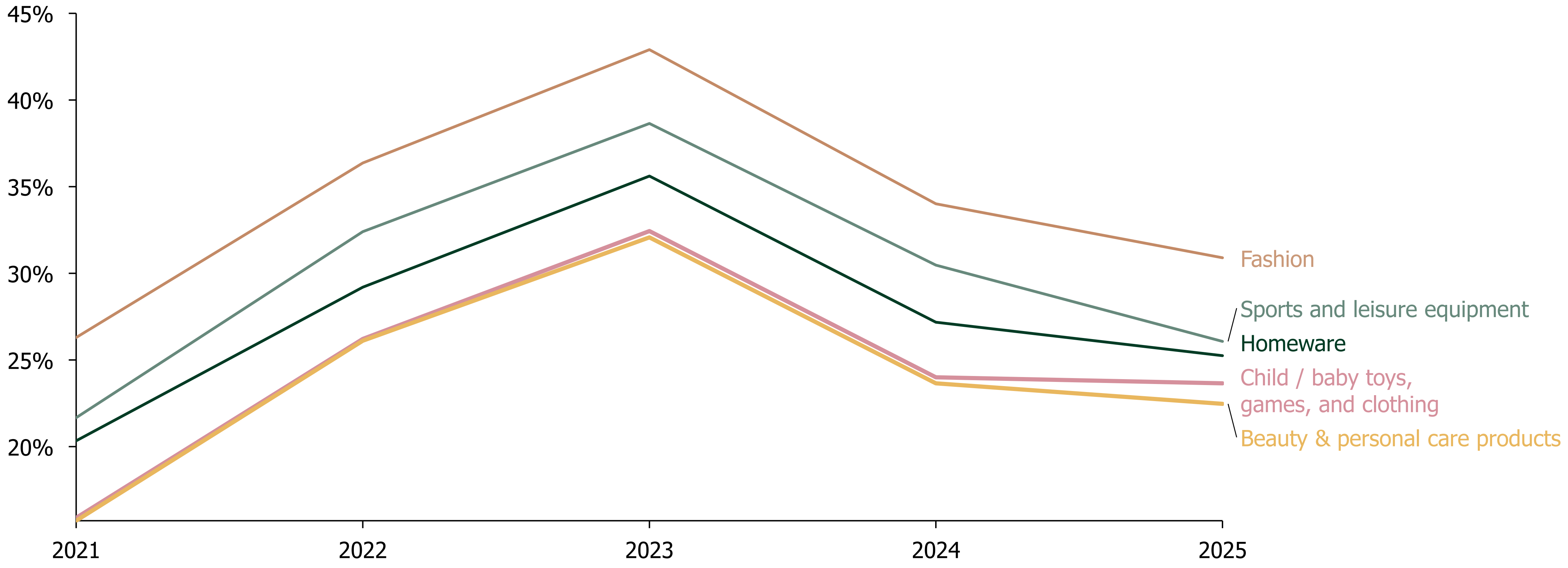
% OF RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE IN ESSENTIALS, Q3 2021 – 2025



Note: October 2021 n = 579 - 1005, August 2022 n = 1545-3019, July 2023 n = 706-1554, Jul 2024 n = 950-1960, August 2025 n = 1074-2152; 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.
Source: Eden McCallum & Dynata surveys

Over time, the share of respondents who decreased spending is down across all categories; discretionary categories are seeing the greatest drop in the last year [2/3]

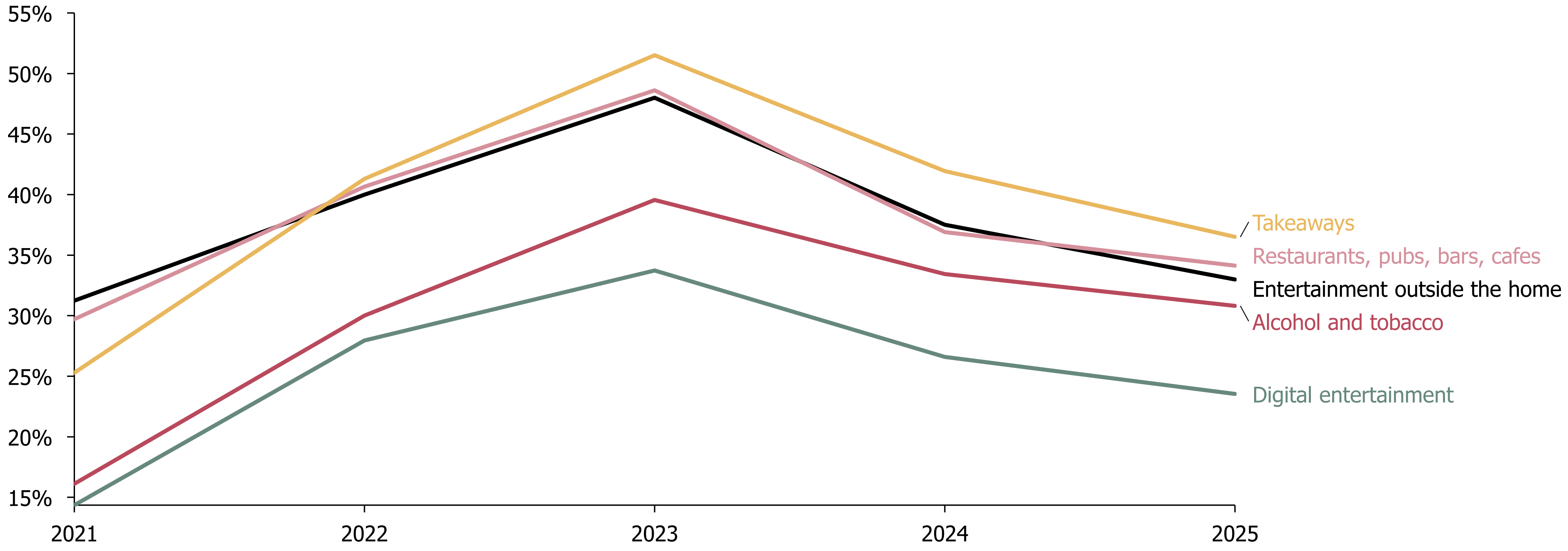
% OF RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE IN FASHION & HOME, Q3 2021 – 2025



Note: October 2021 n = 579 - 1005, August 2022 n = 1545-3019, July 2023 n = 706-1554, Jul 2024 n = 950-1960, August 2025 n = 1074-2152; 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.
Source: Eden McCallum & Dynata surveys

Over time, the share of respondents who decreased spending is down across all categories; discretionary categories are seeing the greatest drop in the last year [3/3]

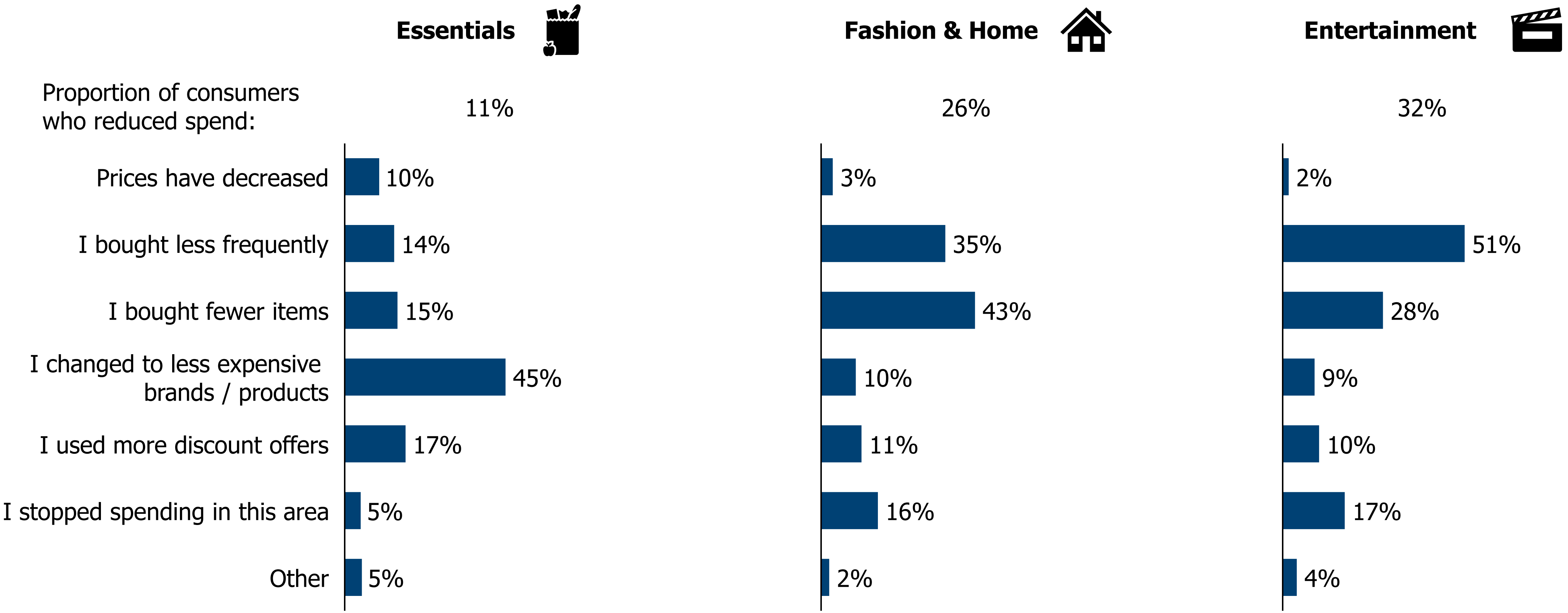
% OF RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE IN ENTERTAINMENT, Q3 2021 – 2025



Note: October 2021 n = 579 - 1005, August 2022 n = 1545-3019, July 2023 n = 706-1554, Jul 2024 n = 950-1960, August 2025 n = 1074-2152; 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.
Source: Eden McCallum & Dynata surveys

Decreased spend in Essentials was predominantly due to trading down. In discretionary categories, reduced consumption was the predominant lever

WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, AVERAGE OF CATEGORIES, Q3 2025



Note: August 2025 n = 311-1243; 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 trading down was the most widespread lever to reducing spend across all categories; in Groceries there was significant cutting of consumption and use of discounts

WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, Q3 2025

KEY: Greater than 5ppt above av. / Less than 5ppt below av.

Essentials	Groceries[1]	Broadband	Mobile[2]	Average of Essentials
Proportion of consumers who reduced spend:	13%	10%	11%	**11%**
Prices have decreased	0%	14%	10%	10%
I bought less frequently	36%	7%	11%	14%
I bought fewer items	43%	12%	6%	15%
I changed to less expensive brands / products	30%	47%	49%	45%
I used more discount offers	38%	13%	13%	17%
I stopped spending in this area	4%	7%	3%	5%
Other	4%	6%	4%	5%

Note: August 2025 n = 53-140; 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 'Decreased a lot' and 'Decreased somewhat'; (1) Excludes alcohol and tobacco, (2) Includes Mobile data
Source: Eden McCallum & Dynata surveys

Within Fashion & Home, buying less – or nothing – was the main lever to reducing spend across all categories

KEY: Greater than 5ppt above av. / Less than 5ppt below av.

WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, Q3 2025

Fashion & Home	**Child / baby toys, games, and clothing**	**Beauty and personal care products**	**Homeware**	**Sports and leisure equipment**	**Fashion**	**Average of Fashion & Home**
Proportion of consumers who reduced spend:	24%	22%	25%	26%	31%	**26%**
Prices have decreased	5%	3%	3%	4%	2%	3%
I bought less frequently	30%	39%	30%	27%	45%	35%
I bought fewer items	39%	44%	42%	38%	51%	43%
I changed to less expensive brands / products	8%	20%	3%	10%	8%	10%
I used more discount offers	9%	12%	9%	14%	12%	11%
I stopped spending in this area	17%	8%	20%	23%	12%	16%
Other	7%	2%	1%	1%	2%	2%

Note: August 2025 n = 180-259; 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 Entertainment, frequency of spend was the main lever to reduce spend across majority of categories; Digital and outside entertainment are most at-risk of a complete stop in purchasing

KEY: Greater than 5ppt above av. / Less than 5ppt below av.

WAYS IN WHICH RESPONDENTS SPENT LESS IN LAST 3 MONTHS, Q3 2025

Entertainment	Digital entertainment	Alcohol and tobacco	Entertainment outside the home	Restaurants, pubs, bars, cafés	Takeaways	Average of Entertainment
Proportion of consumers who reduced spend:	24%	31%	33%	34%	37%	**32%**
Prices have decreased	3%	2%	2%	2%	0%	2%
I bought less frequently	32%	46%	44%	63%	67%	51%
I bought fewer items	36%	36%	25%	20%	23%	28%
I changed to less expensive brands / products	15%	10%	9%	9%	4%	9%
I used more discount offers	15%	7%	12%	10%	9%	10%
I stopped spending in this area	22%	16%	22%	12%	15%	17%
Other	3%	6%	6%	3%	2%	4%

Note: August 2025 n = 220-286; 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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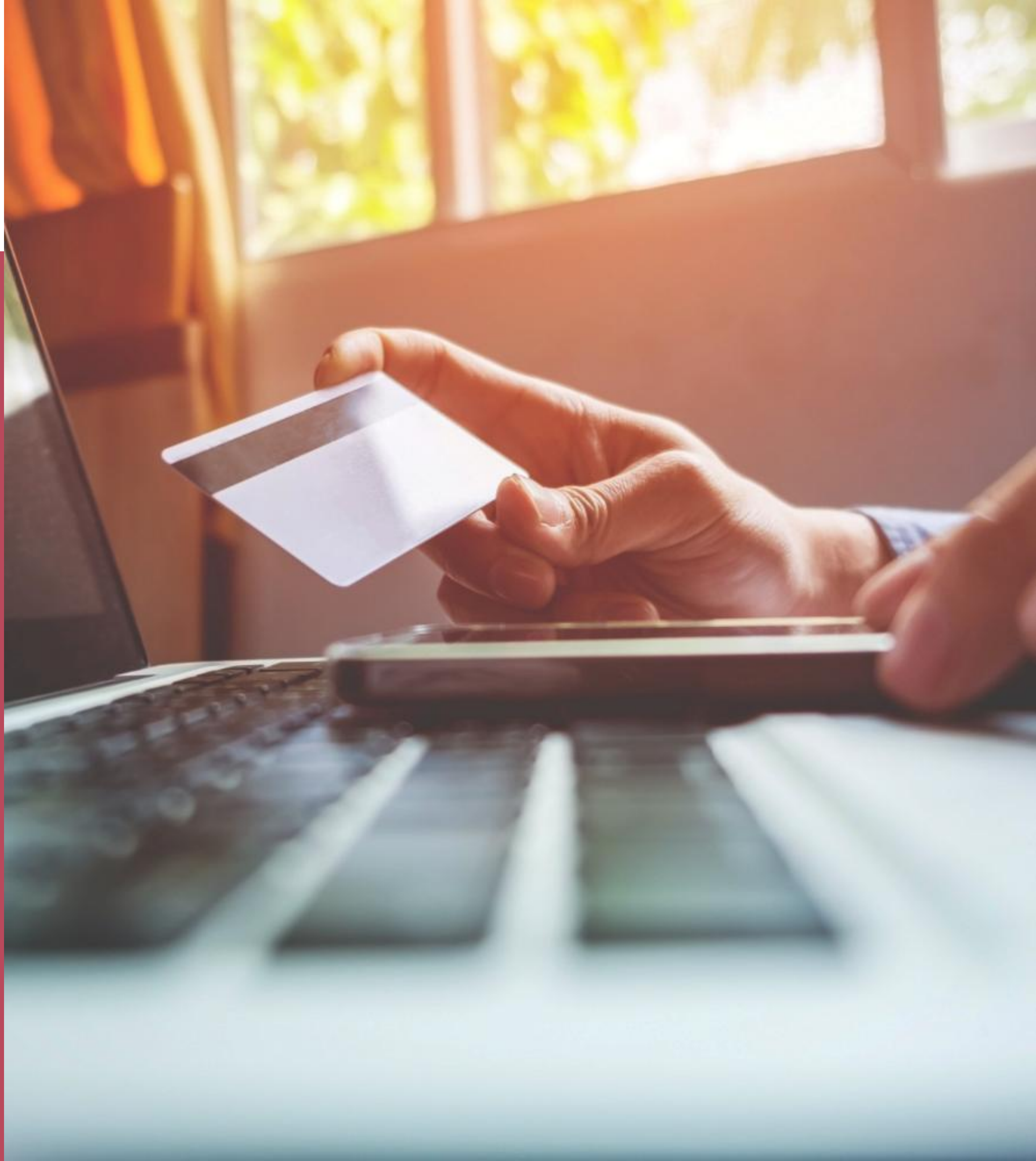

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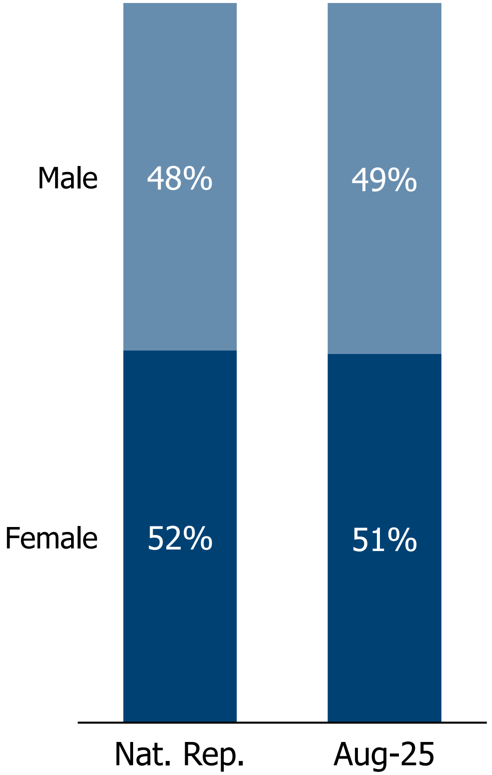
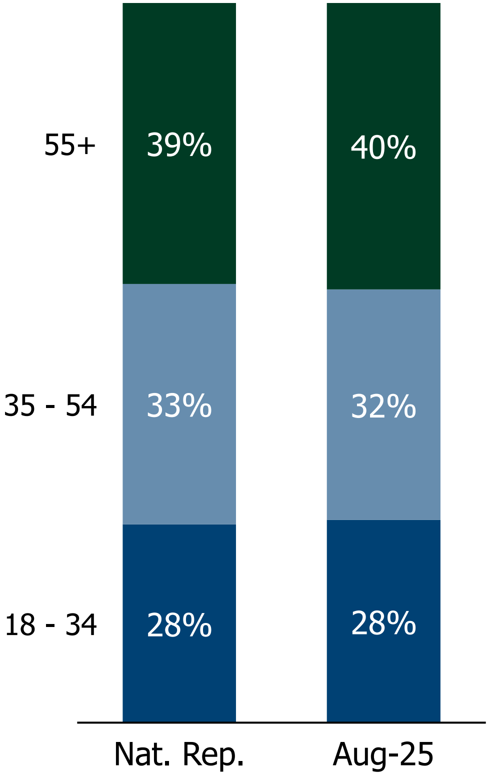
The survey respondents are a nationally representative sample in terms of gender, age and regional distribution

DETAILS OF SAMPLE SURVEY RESPONDENTS, 2025

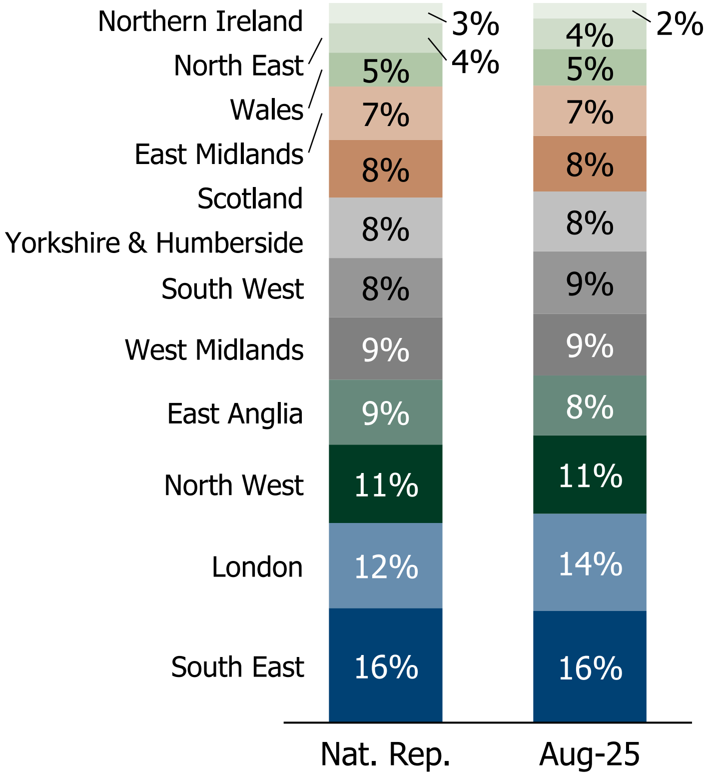
What gender are you?



How old are you?



Where do you live?



Note: n = 1,995 to 2,000; 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, Eurostat