Eden McCallum Consumer Survey

Q3 Consumer Sentiment: Netherlands

Published Sept 2025

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Summary

Sentiment:

- Overall, optimism about the future has declined to 45% versus the 50% in 2024 and 2023, while pessimism is rising (now 21% vs. 19% in 2024) (but not yet to 2022 levels)
- Young people (18-35) are the most opinionated about the future with the highest proportion of respondents who are pessimistic (24%) and optimistic (51%)
- *On global/country level issues:*
  - Global conflict remains the leading concern (70% respondents concerned/very concerned) and has continued to steadily rise since 2023; crime (58%), terrorism (54%) and pollution/waste (50%) are the next biggest concerns
  - Economic concerns (global and national) remain relatively low but have seen a rise this year
- *On personal issues:*
  - Ability to save and to spend remains the most pressing personal concern, but is continuing to fall since 2022 (21% and 19% respectively very negative/negative)
  - Similarly, negativity around other personal issues have fallen since 2024 (and 2022) though there is a slight increase regarding job security (now 12% negative/very negative)

Spend:

- Overall, in Essentials, those increasing spend outnumbered those decreasing spend while the opposite was true in Discretionary categories (except in Beauty and Digital Entertainment)
  - In Essentials increased spend was due to increasing prices
  - In Discretionary categories, decreased spend was driven primarily by reduced consumption as well by discount offers
- This year, the proportion of respondents increasing spend is generally up from 2024, but not yet reaching 2023 levels, while the proportion of respondents decreasing their spend is very gradually decreasing over time in all categories excepting alcohol and tobacco

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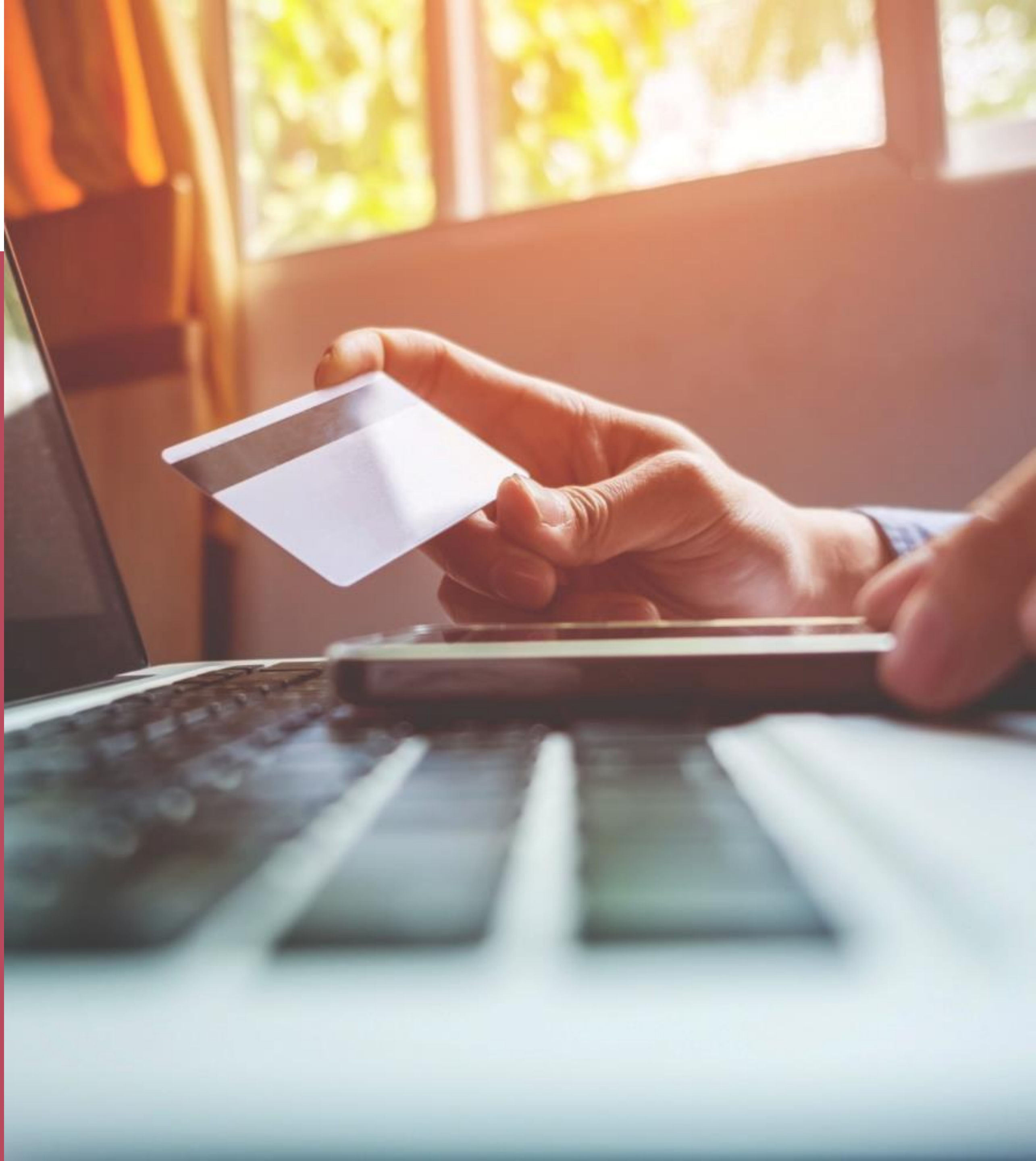
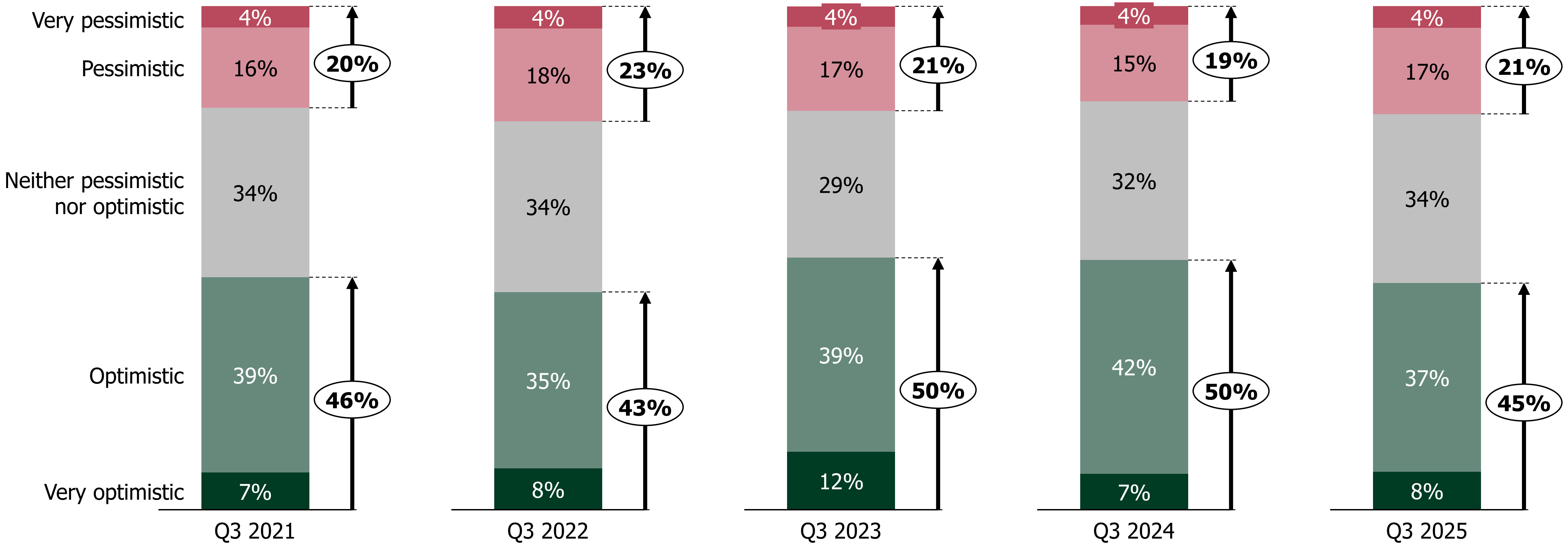


45% of respondents are optimistic about the future, a reduction on the previous 2 years; pessimism rises again to 21% but not yet reaching 2022 levels (23%)

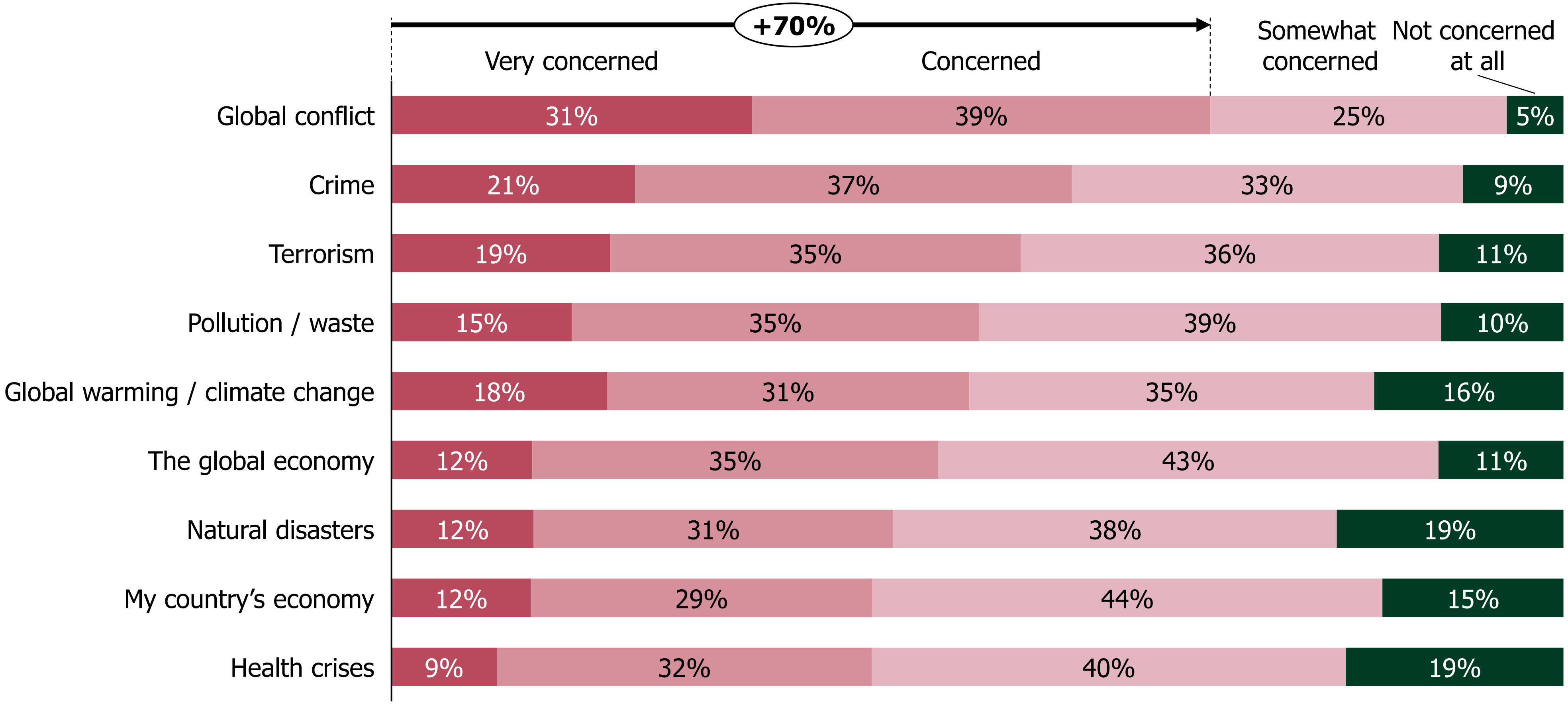
RESPONDENTS’ VIEWS ON HOW THEY FEEL ABOUT THE FUTURE OVERALL, Q3 2021 – Q3 2025



Note: October 2021 n = 988, August 2022 n = 3136, July 2023 n = 1562; July 2024 n = 1978, August 2025 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

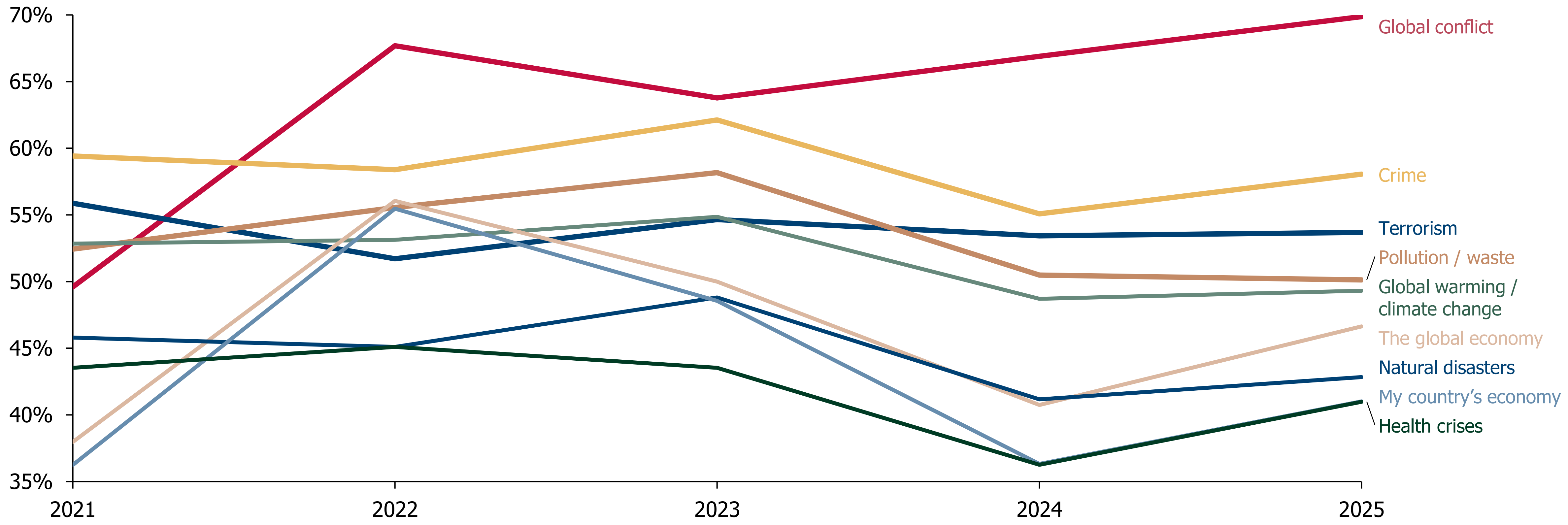
RESPONDENTS' VIEWS ON ISSUES FACING COUNTRY AND WORLD, Q3 2025



Note: August 2025 n = 1962-1985; 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

Concern over global conflict continues to steadily rise; economic concerns have risen sharply this year, but remain behind 2022 levels, while climate concerns stabilise

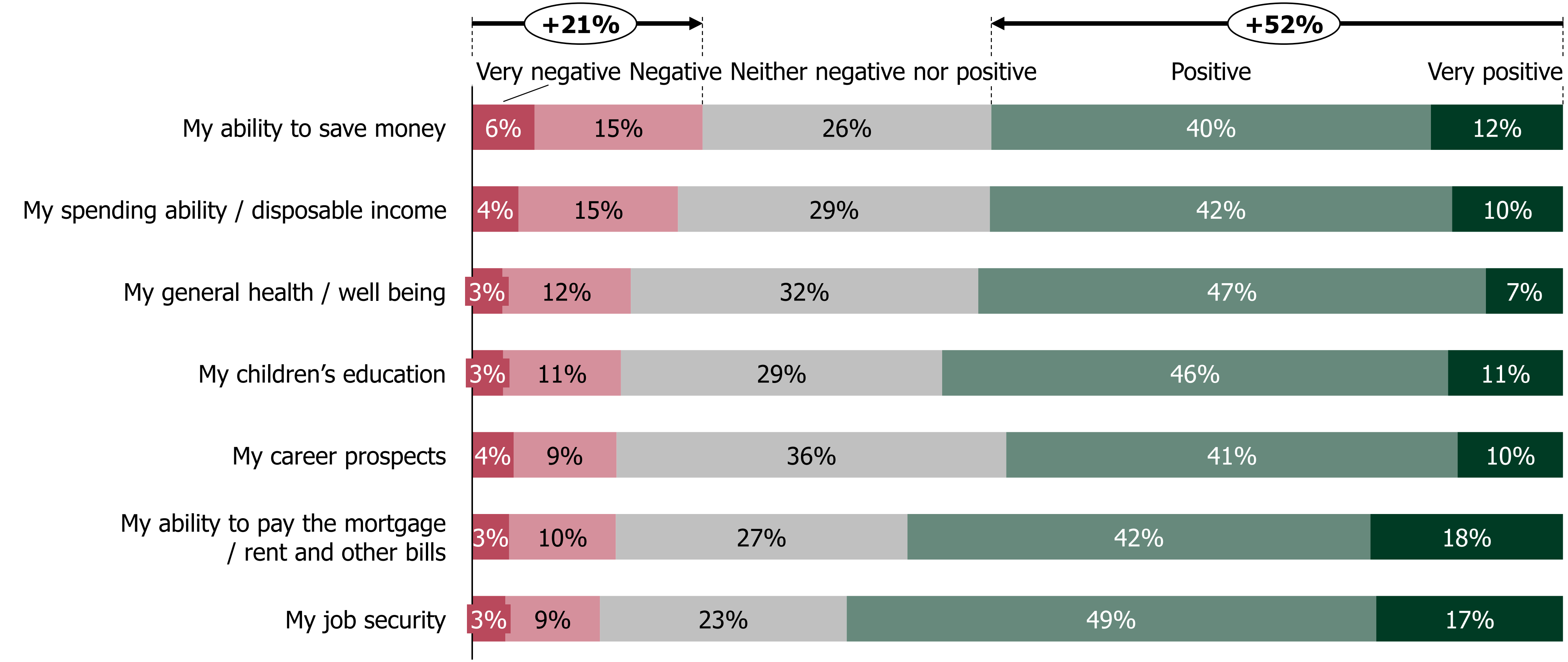
SHARE OF RESPONDENTS WHO WERE 'VERY CONCERNED' OR 'CONCERNED', Q3 2021 – 2025



Note: October 2021 n = 985 – 1008, October 2022 n = 2667-2704, July 2023 n = 1553-1571, July 2024 n = 1949-1988, August 2025 n = 1962-1985; 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, positive views are held across the board; the ability to save and spend raises the widest negative sentiment

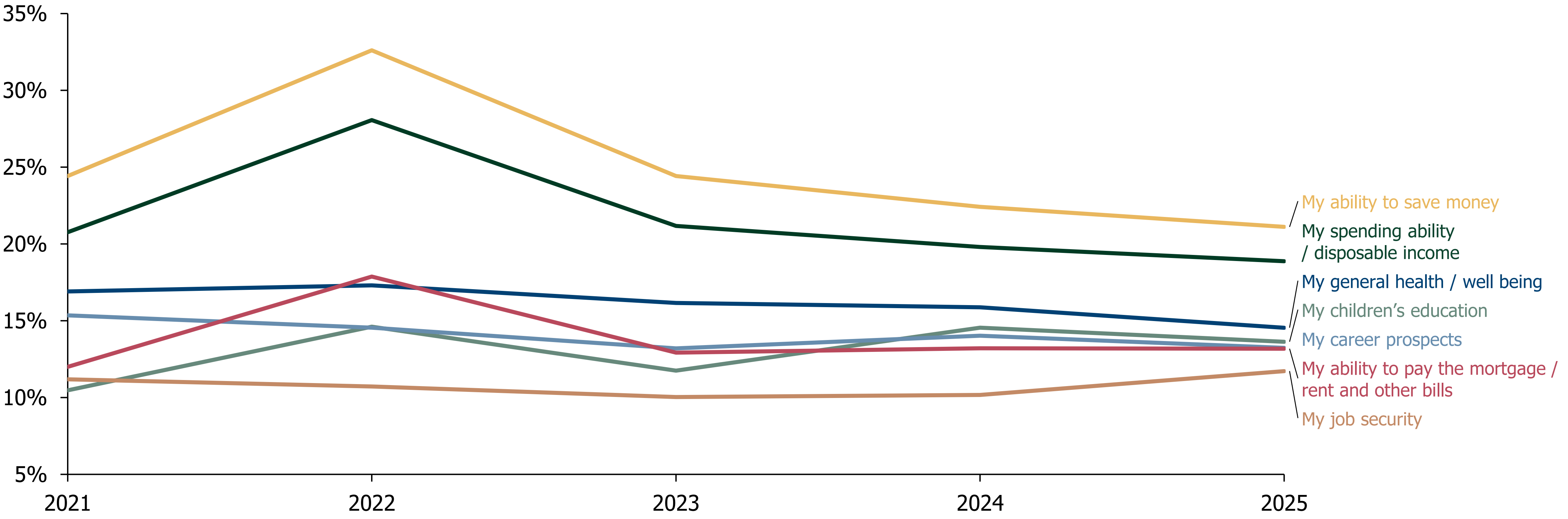
RESPONDENTS' VIEWS ON PERSONAL ISSUES FACED, Q3 2025



Note: August 2025 n = 1100-1994; 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

Since 2022, negative sentiment on the most prominent top 4 personal issues is reducing; while ability to save & spend are the top concerns, the sharp rise in global/country economic concerns isn't increasing negativity

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



Note: August 2021, n = 530-995, October 2022 n = 1437-2716, July 2023 n = 927-1584, July 2024 n = 1086-1996, August 2025 n = 1100-1994; 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

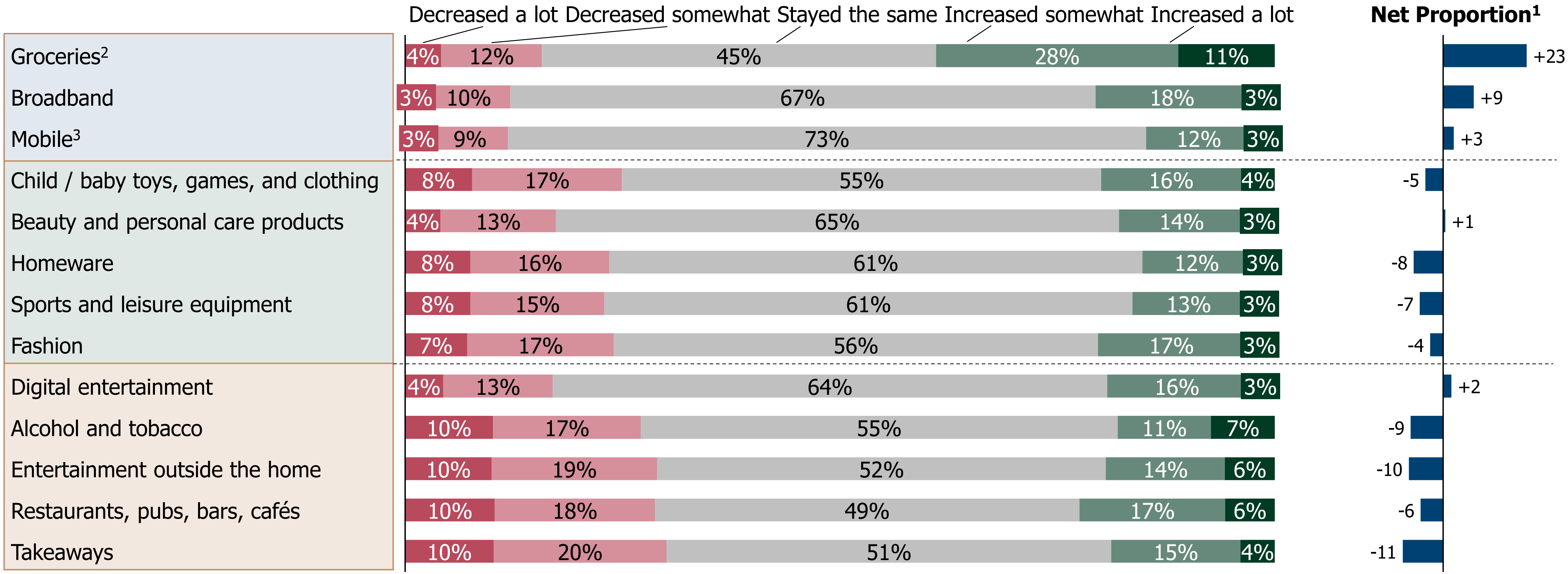
GROUPING OF SPEND CATEGORIES

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 reduced their spend than increased it, except in beauty/personal care and digital entertainment

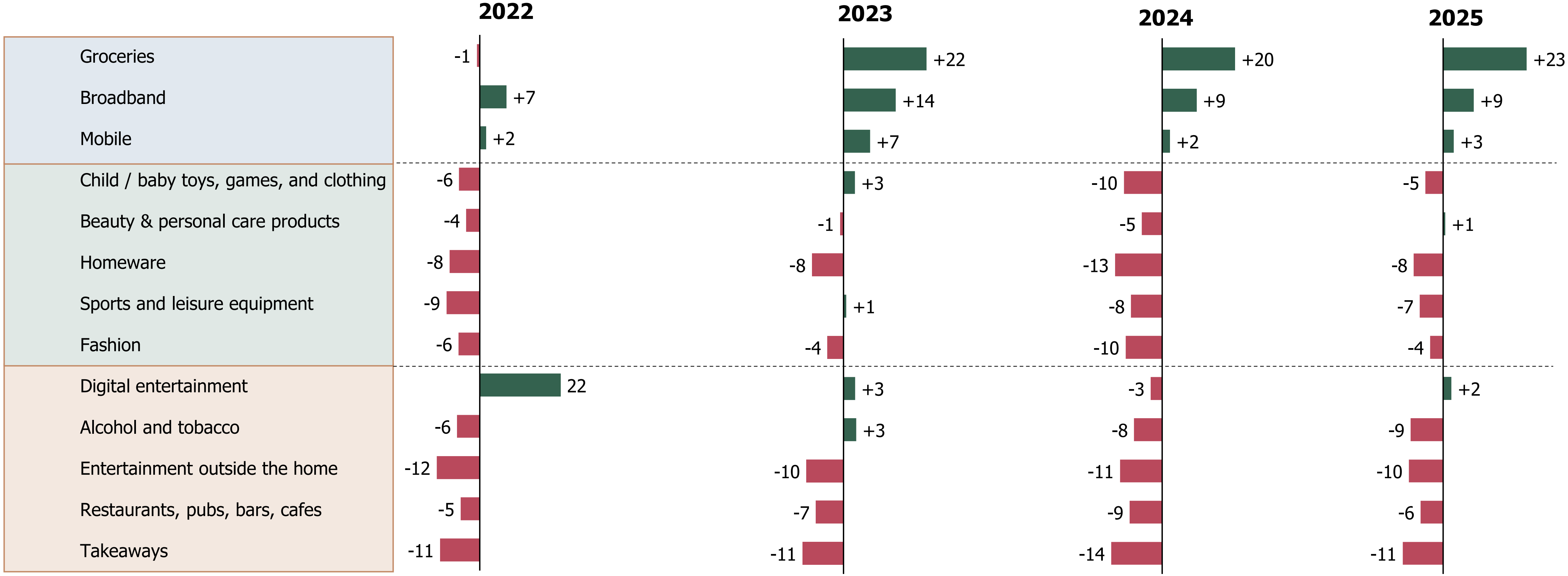
% OF CONSUMERS REPORTING CHANGE IN SPEND OVER PAST 3 MONTHS, BY SUBCATEGORY, Q3 2025



Note: August 2025 n = 1127-1979; 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 their spend outnumbered those reducing it in Essentials, particularly Grocery; across discretionary categories more reduced their spend than increased it, except in beauty/personal care and digital entertainment

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



Note: August 2022 n = 1875-3148, July 2023 n = 982-1573, July 2024 n = 1124-1982, August 2025 n = 1127-1979; 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 spend has seen similar fluctuation across categories; generally up slightly from 2024, but typically well below 2023

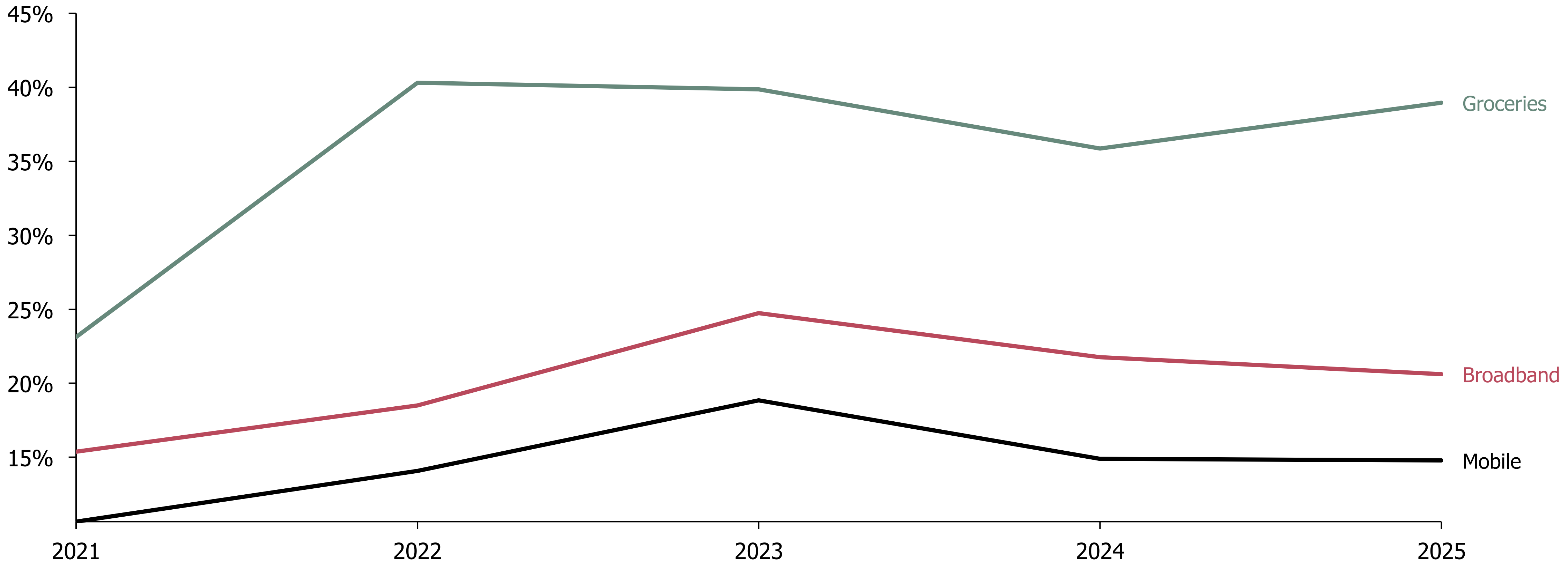
% OF RESPONDENTS WHO HAD INCREASED THEIR SPEND BY CATEGORY, Q3 2023 – 2025

	Q3 2023	Q3 2024	Q3 2025	Q3 2025 vs Q3 2023	Q3 2025 vs Q3 2024
Groceries[1]	40%	36%	39%	-1	+3
Broadband	25%	22%	21%	-4	-1
Mobile[2]	19%	15%	15%	-4	0
Child / baby toys, games, and clothing	26%	19%	20%	-6	+1
Beauty & personal care products	21%	15%	18%	-3	+3
Homeware	18%	13%	15%	-3	+2
Sports and leisure equipment	23%	16%	16%	-6	+1
Fashion	23%	17%	20%	-3	+3
Digital entertainment	22%	16%	19%	-2	+3
Alcohol and tobacco	26%	19%	18%	-8	-1
Entertainment outside the home	22%	18%	19%	-2	+1
Restaurants, pubs, bars, cafés	26%	22%	22%	-4	+1
Takeaways	23%	18%	19%	-4	+1

Note: July 2023 n = 982-1573, July 2024 n = 1124-1982, August 2025 n = 1127-1979; 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

The share of respondents who increased spend has seen similar fluctuation across categories; generally up slightly from 2024, but typically well below 2023 [1/3]

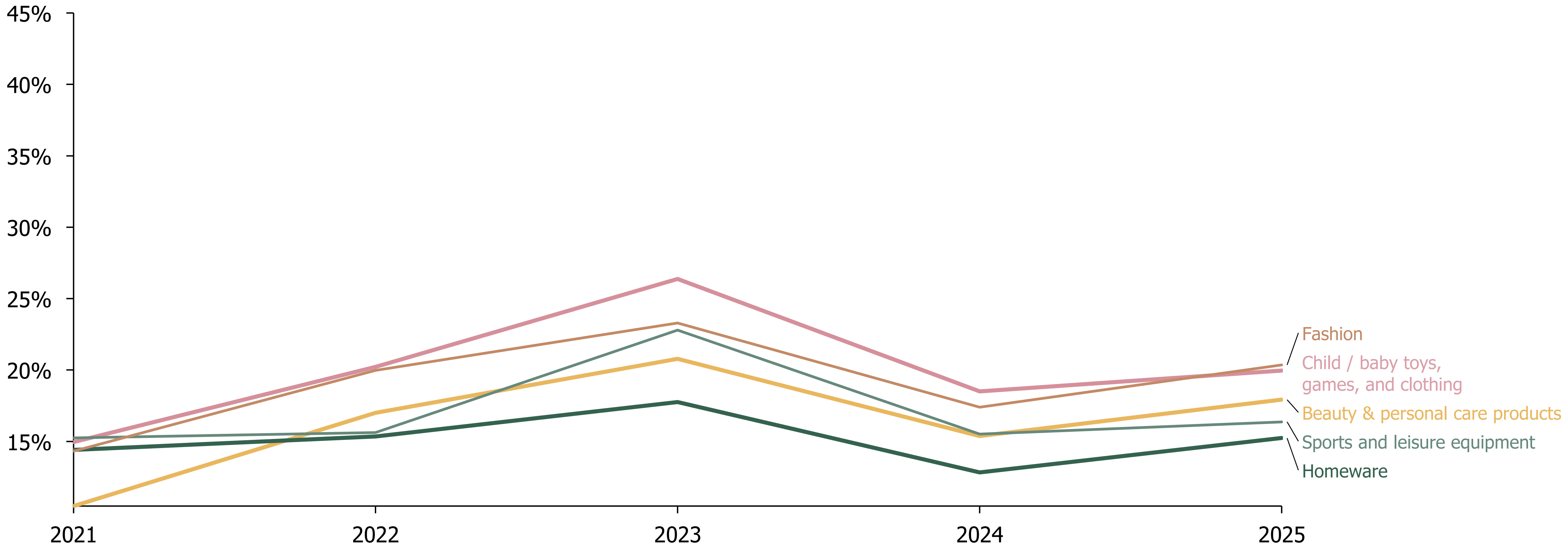
% OF RESPONDENTS WHO HAD INCREASED THEIR SPEND IN ESSENTIALS BY CATEGORY, Q3 2021 – 2025



Note: October 2021 n = 642 - 999, August 2022 n = 1875-3148, July 2023 n = 982-1573, July 2024 n = 1124-1982, August 2025 n = 1127-1979; 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

The share of respondents who increased spend has seen similar fluctuation across categories; generally up slightly from 2024, but typically well below 2023 [2/3]

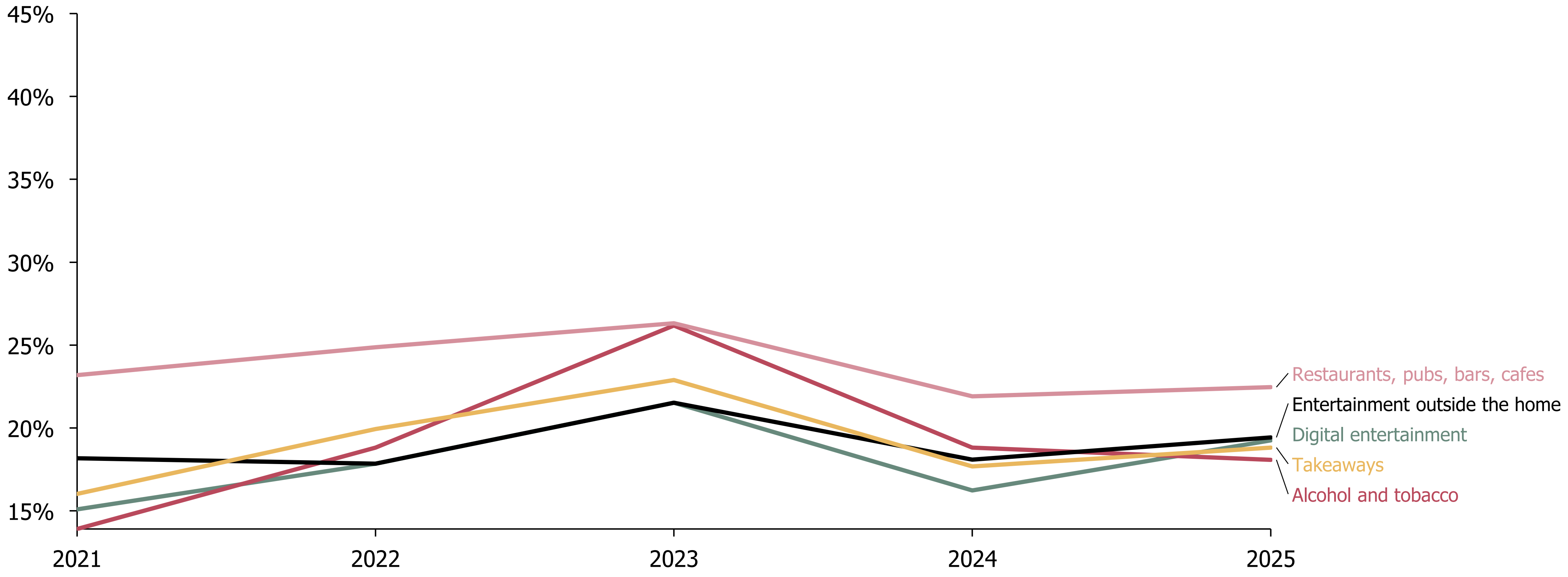
% OF RESPONDENTS WHO HAD INCREASED THEIR SPEND IN FASHION & HOME BY CATEGORY, Q3 2021 – 2025



Note: October 2021 n = 642 - 999, August 2022 n = 1875-3148, July 2023 n = 982-1573, July 2024 n = 1124-1982, August 2025 n = 1127-1979; 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

The share of respondents who increased spend has seen similar fluctuation across categories; generally up slightly from 2024, but typically well below 2023 [3/3]

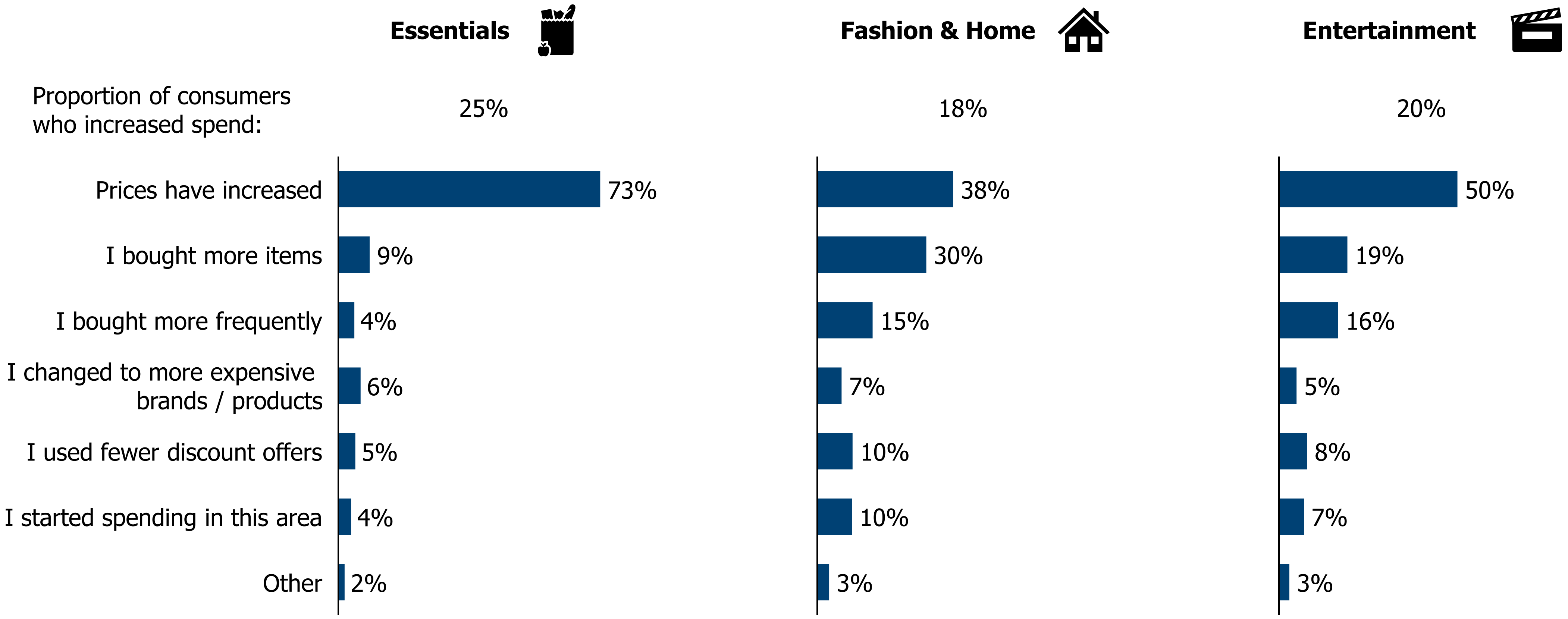
% OF RESPONDENTS WHO HAD INCREASED THEIR SPEND IN ENTERTAINMENT BY CATEGORY, Q3 2021 – 2025



Note: October 2021 n = 642 - 999, August 2022 n = 1875-3148, July 2023 n = 982-1573, July 2024 n = 1124-1982, August 2025 n = 1127-1979; 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 2025



Note: August 2025 n = 120-266; 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, though higher consumption was also partly a factor in Mobile

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:	39%	21%	15%	**25%**
Prices have increased	87%	72%	53%	73%
I bought more items	8%	8%	11%	9%
I bought more frequently	3%	4%	6%	4%
I changed to more expensive brands / products	3%	4%	14%	6%
I used fewer discount offers	1%	5%	10%	5%
I started spending in this area	1%	4%	6%	4%
Other	2%	1%	3%	2%

Note: August 2025 n = 182-266; 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, the primary factors in increasing spend were a mix of increased pricing and increased consumption

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:	20%	18%	15%	16%	20%	**18%**
Prices have increased	34%	51%	32%	38%	33%	38%
I bought more items	35%	20%	30%	24%	44%	30%
I bought more frequently	18%	14%	15%	14%	16%	15%
I changed to more expensive brands / products	6%	9%	4%	10%	5%	7%
I used fewer discount offers	10%	9%	13%	11%	7%	10%
I started spending in this area	11%	8%	17%	11%	3%	10%
Other	6%	2%	6%	3%	1%	3%

Note: August 2025 n = 135-165; 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

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

WAYS IN WHICH RESPONDENTS SPENT MORE BY CATEGORY 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:	19%	18%	19%	22%	19%	**20%**
Prices have increased	44%	57%	41%	58%	50%	50%
I bought more items	22%	15%	20%	15%	22%	19%
I bought more frequently	12%	14%	18%	16%	24%	16%
I changed to more expensive brands / products	7%	8%	4%	3%	2%	5%
I used fewer discount offers	12%	8%	7%	4%	7%	8%
I started spending in this area	8%	5%	9%	6%	7%	7%
Other	1%	3%	5%	4%	1%	3%

Note: August 2025 n = 120-169; 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 gradually decreasing, with an exception in Alcohol and tobacco

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

	Q3 2023	Q3 2024	Q3 2025	Q3 2025 vs Q3 2023	Q3 2025 vs Q3 2024
Groceries[1]	18%	16%	16%	-3	0
Broadband	11%	13%	12%	+1	0
Mobile[2]	12%	13%	12%	0	-1
Child / baby toys, games, and clothing	23%	29%	25%	+2	-4
Beauty and personal care products	22%	21%	17%	-4	-4
Homeware	26%	26%	23%	-2	-2
Sports and leisure equipment	22%	24%	23%	+1	-1
Fashion	27%	27%	24%	-3	-3
Digital entertainment	19%	19%	17%	-2	-2
Alcohol and tobacco	23%	26%	27%	+4	+1
Entertainment outside the home	34%	29%	29%	-5	0
Restaurants, pubs, bars, cafés	34%	31%	29%	-5	-2
Takeaways	34%	31%	30%	-3	-1

Note: July 2023 n = 982-1573; July 2024 n = 1124-1982, August 2025 n = 1127-1979; 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

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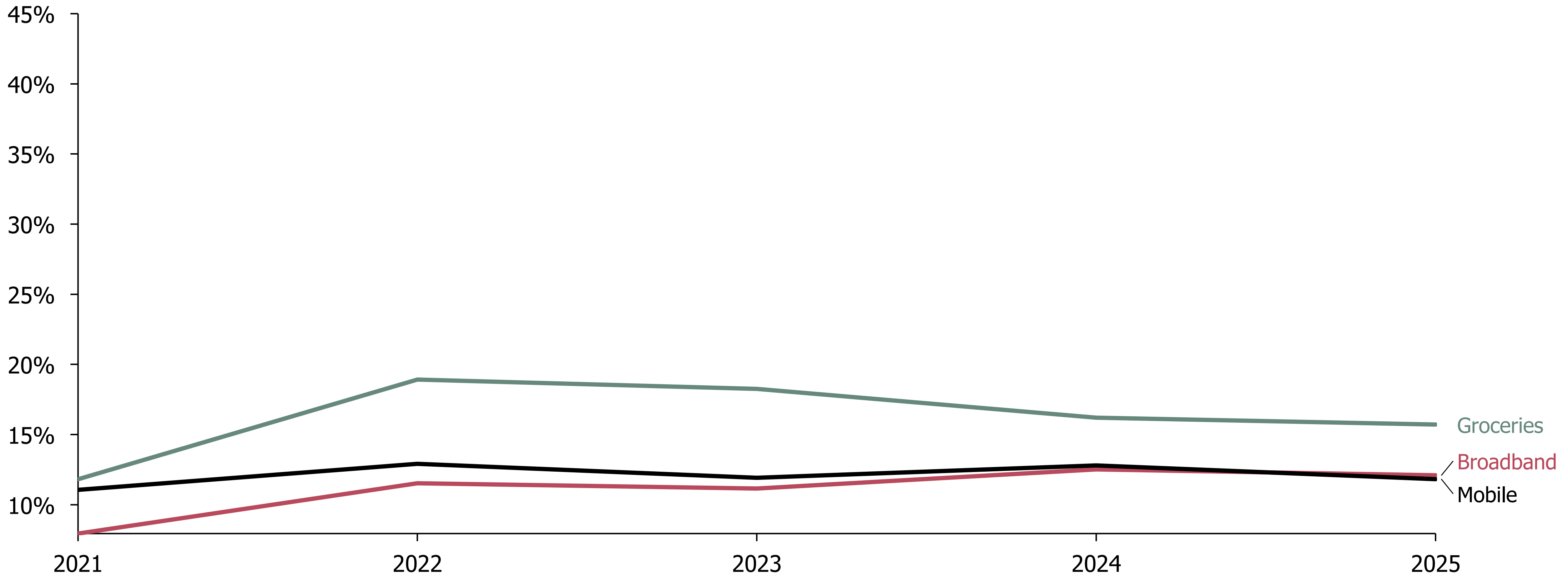
Over time, the proportion who decreased spending has been gradually decreasing, with an exception in Alcohol and tobacco [1/3]

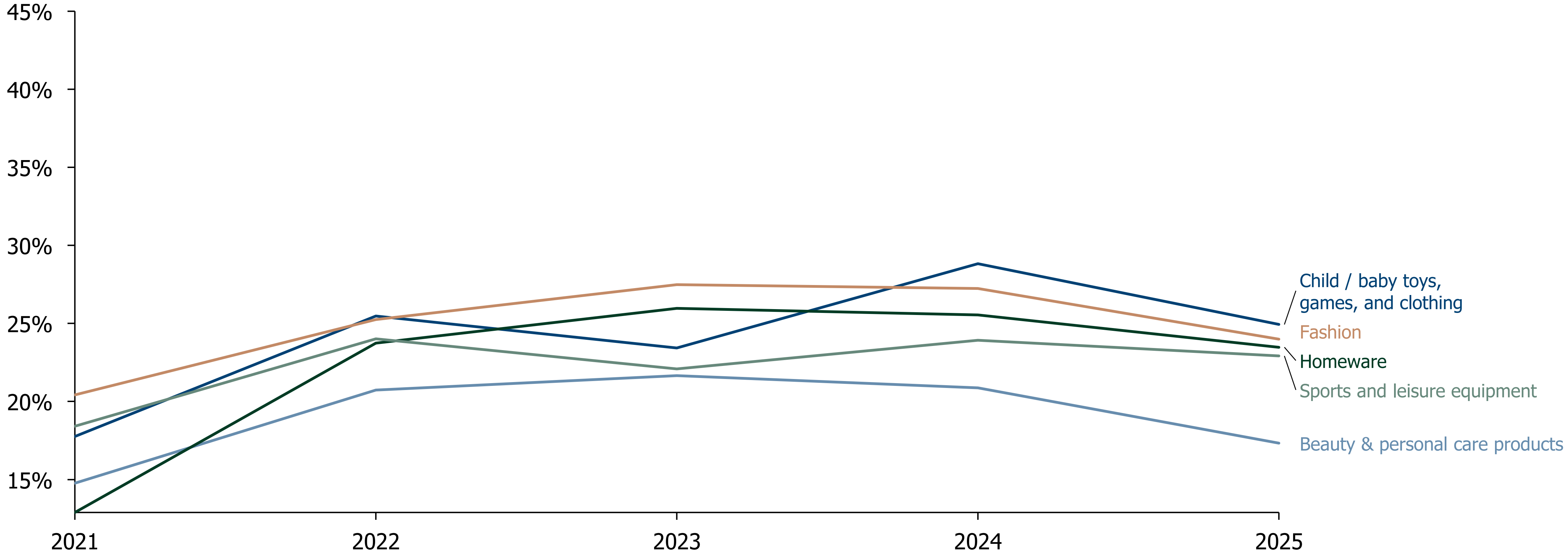
% OF RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE IN ESSENTIALS BY CATEGORY, Q3 2021 – 2025



Note: October 2021 n = 642 - 999, August 2022 n = 187-3148, July 2023 n = 982-1573; July 2024 n = 1124-1982, August 2025 n = 1127-1979; 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

Over time, the proportion who decreased spending has been gradually decreasing, with an exception in Alcohol and tobacco [2/3]

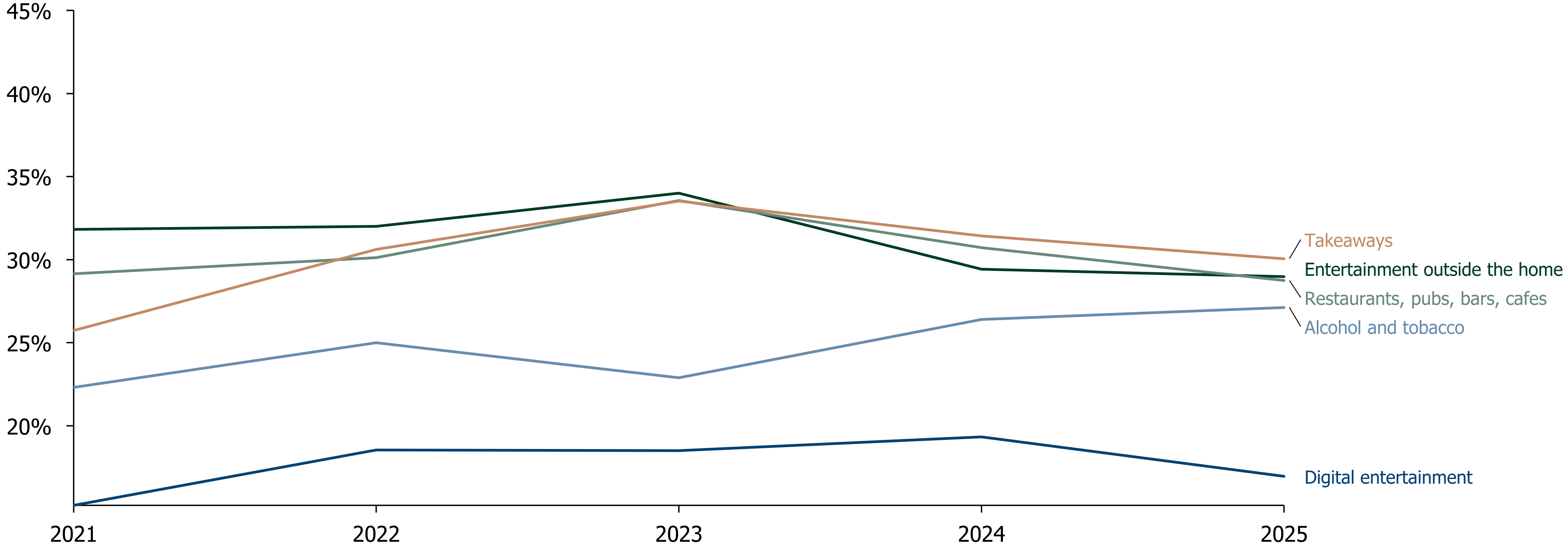
% OF RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE IN FASHION & HOME BY CATEGORY, Q3 2021 – 2025



Note: October 2021 n = 642 - 999, August 2022 n = 187-3148, July 2023 n = 982-1573; July 2024 n = 1124-1982, August 2025 n = 1127-1979; 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

Over time, the proportion who decreased spending has been gradually decreasing, with an exception in Alcohol and tobacco [3/3]

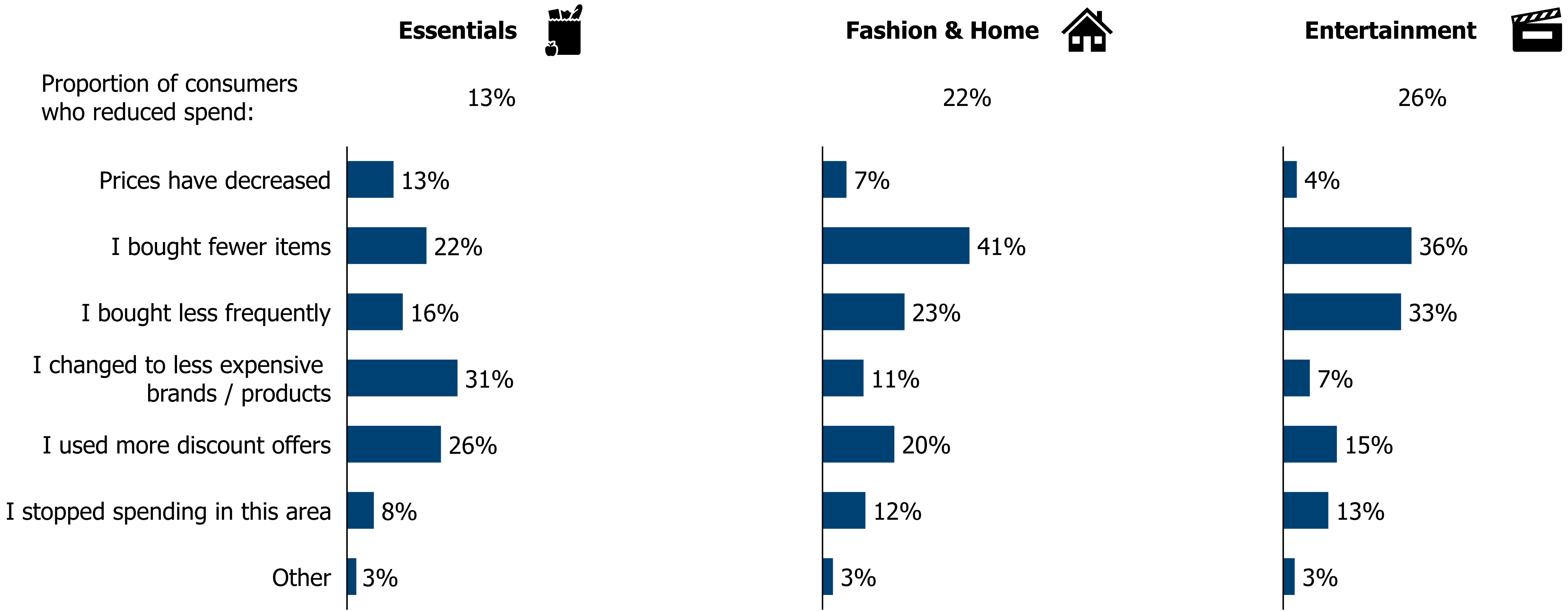
% OF RESPONDENTS WHO HAD DECREASED THEIR EXPENDITURE IN ENTERTAINMENT BY CATEGORY, Q3 2021 – 2025



Note: October 2021 n = 642 - 999, August 2022 n = 187-3148, July 2023 n = 982-1573; July 2024 n = 1124-1982, August 2025 n = 1127-1979; 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 2025



Note: August 2025 n = 73-221, 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 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:	16%	12%	12%	**13%**
Prices have decreased	5%	11%	18%	13%
I bought fewer items	26%	27%	17%	22%
I bought less frequently	23%	11%	15%	16%
I changed to less expensive brands / products	33%	29%	32%	31%
I used more discount offers	47%	22%	20%	26%
I stopped spending in this area	5%	8%	8%	8%
Other	1%	3%	3%	3%

Note: August 2025 n = 73-157; 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, ~1/5 of those who spent less cut all their spending on the category

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

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

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:	25%	17%	23%	23%	24%	**22%**
Prices have decreased	9%	5%	7%	8%	4%	7%
I bought fewer items	36%	40%	45%	34%	51%	41%
I bought less frequently	20%	22%	22%	23%	29%	23%
I changed to less expensive brands / products	14%	17%	10%	11%	7%	11%
I used more discount offers	18%	35%	14%	16%	20%	20%
I stopped spending in this area	15%	6%	12%	19%	7%	12%
Other	5%	3%	2%	2%	3%	3%

Note: August 2025 n = 175-206; 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; nearly 1/5 of those who reduced spend cut all spending on Alcohol/tobacco

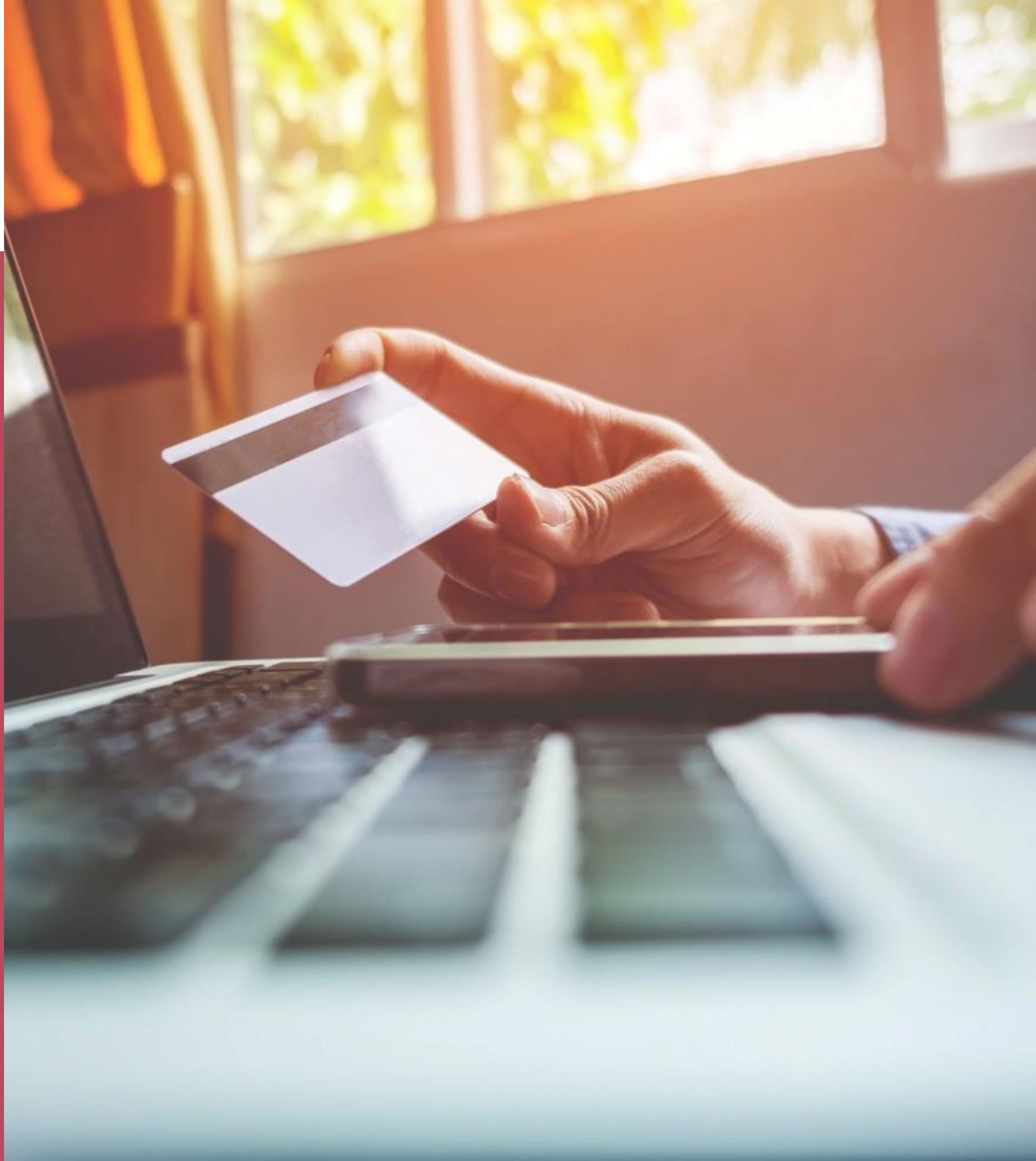
WAYS IN WHICH RESPONDENTS SPENT LESS BY CATEGORY IN LAST 3 MONTHS, Q3 2025

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

Entertainment	**Digital entertainment**	**Alcohol and tobacco**	**Entertainment outside the home**	**Restaurants, pubs, bars, cafés**	**Takeaways**	**Average of Entertainment**
Proportion of consumers who reduced spend:	17%	27%	29%	29%	30%	**26%**
Prices have decreased	6%	3%	4%	3%	3%	4%
I bought fewer items	38%	39%	38%	32%	33%	36%
I bought less frequently	21%	22%	30%	40%	50%	33%
I changed to less expensive brands / products	12%	8%	7%	7%	5%	7%
I used more discount offers	19%	11%	21%	15%	10%	15%
I stopped spending in this area	16%	18%	9%	11%	10%	13%
Other	1%	8%	2%	5%	0%	3%

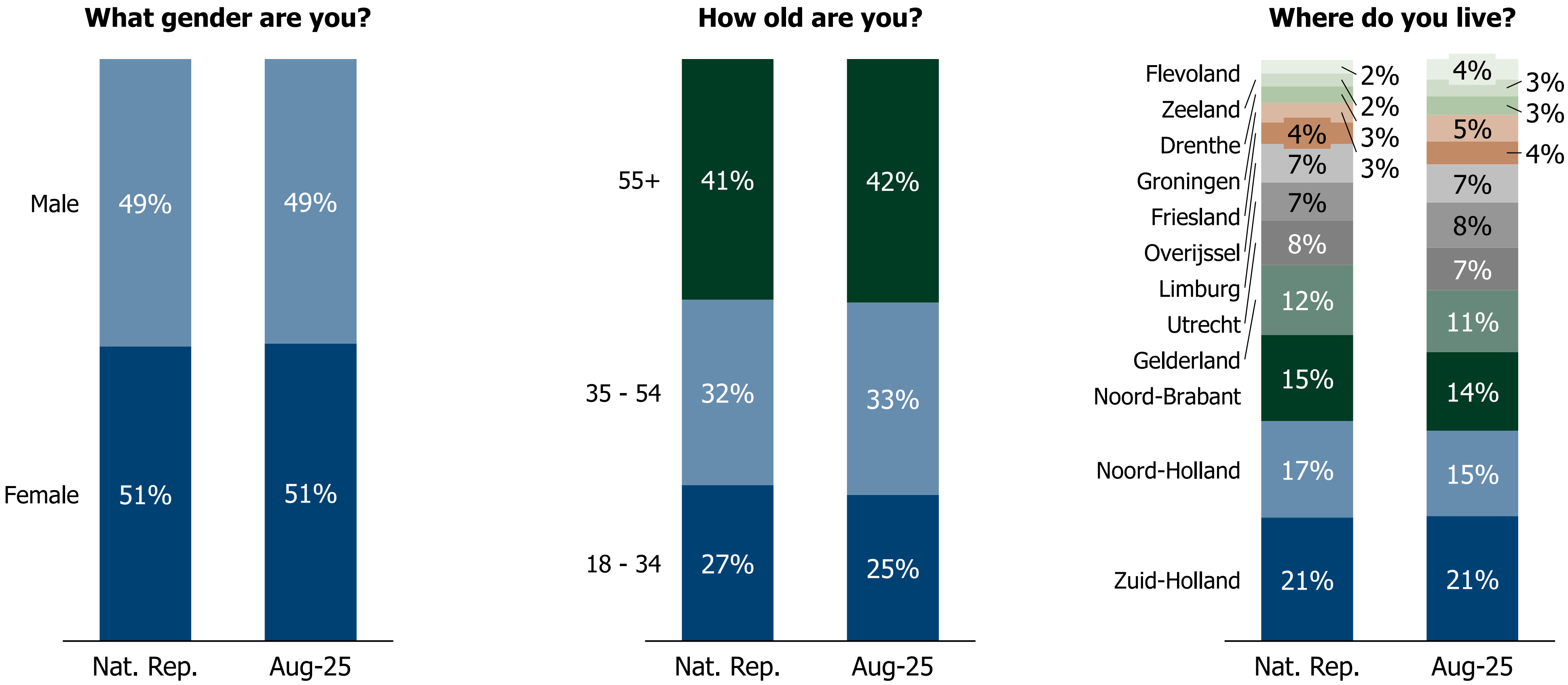
Note: August 2025 n = 170-221; Question: *'How has your spending in the following areas changed in the past 3 months?'; 'In what way did you spend less on this category?',* includes those who answered 'Decreased a lot' and 'Decreased somewhat'.
Source: Eden McCallum & Dynata surveys

Contents



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

DETAILS OF SAMPLE SURVEY RESPONDENTS, 2025



Note: Totals may not equal 100% due to rounding; n = 1,989 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