



Family Business Survey 2025



Netherlands Report
October 2025

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About the Family Business Survey

The Family Business Survey is a global market survey among key decision makers in family businesses within a number of PwC's key territories. The goal of the survey is to get an understanding of what family businesses are thinking on the key issues of the day.



1,325

interviews conducted
so far with family
businesses



27

Online interviews
averaging minutes



Interviews conducted
between 1 April 2025
and 17 June 2025



60+

Across
territories



38 interviews were
conducted in the
Netherlands in
this period

1,325 interviews conducted in over 60 territories

Europe

Western Europe	Finland = 42	Norway = 3
	Germany = 90	Portugal = 33
Austria = 21	Greece = 35	Sweden = 34
Belgium = 7	Ireland = 46	Switzerland = 36
Cyprus = 1	Italy = 3	Turkey = 4
Denmark = 44	Netherlands = 38	UK = 38

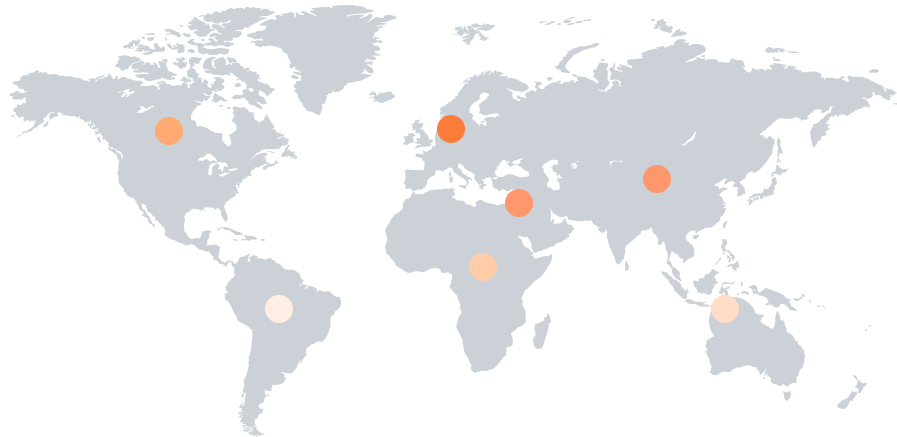
Eastern Europe	Romania = 3
Bulgaria = 13	Slovakia = 4
Croatia = 5	Slovenia = 3
Czech Rep = 5	*Latvia = 1
Poland = 54	

Latin America

Brazil = 20
Colombia = 9
Mexico = 2
Peru = 7
*Guatemala = 4
*Panama = 1
*El Salvador = 1
*Venezuela = 1

Asia and Pacific

Australia = 30
Bangladesh = 34
Mainland China = 26
Hong Kong = 13
India = 33
Indonesia = 67
Japan = 127
Korea = 1
Malaysia = 10
New Zealand = 32
Papua New Guinea = 38
Philippines = 2
Singapore = 2
Taiwan = 32
Thailand = 36
Vietnam = 32



North America

Canada = 14
USA = 81

Middle East

Middle East = 13
Bahrain, Egypt, Jordan,
Lebanon, Oman, UAE, *Israel)

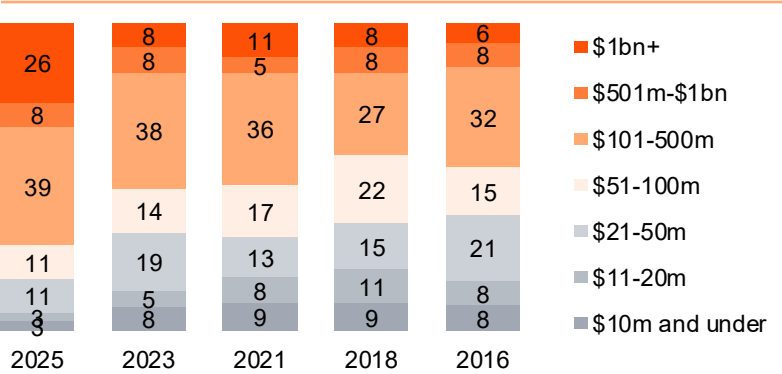
Africa

Ghana = 4	South Africa = 35
Kenya = 10	Uganda = 6
Nigeria = 24	

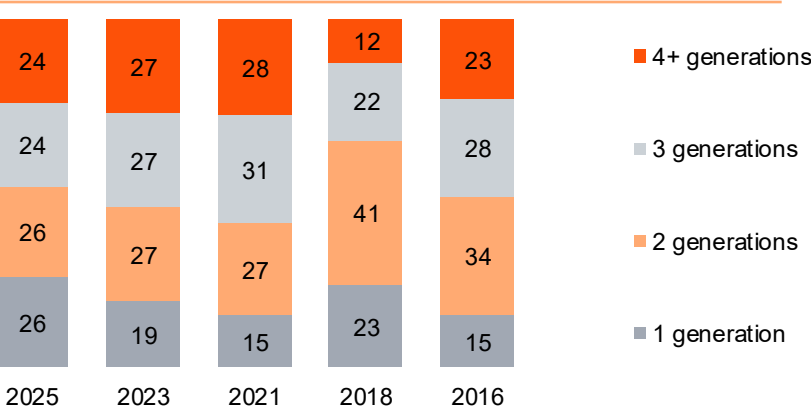
Company profile – which companies have we interviewed?

% Selected

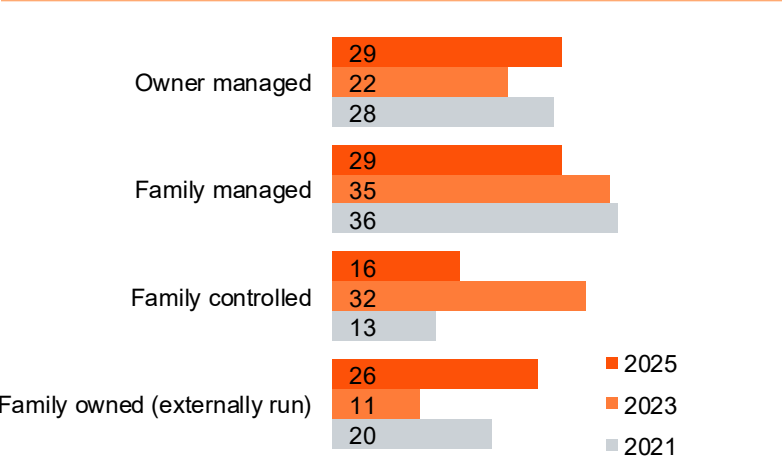
Turnover (sales) (US\$)



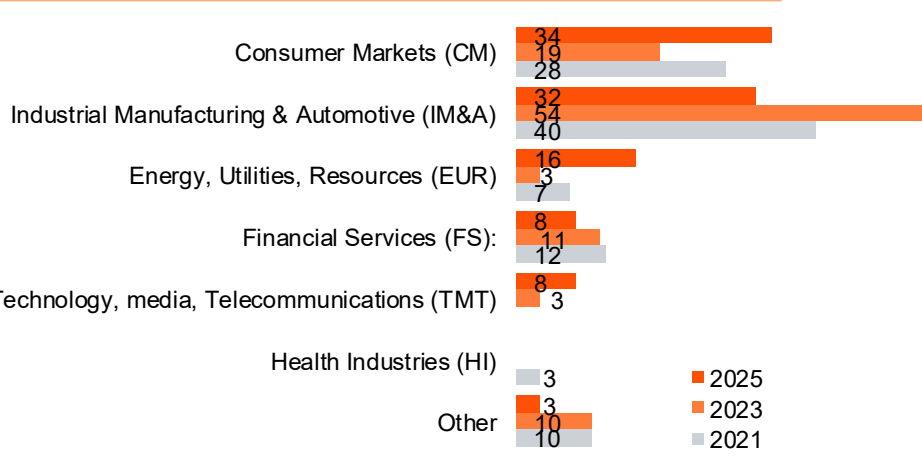
Shareholder Majority



Family's Role in the Business



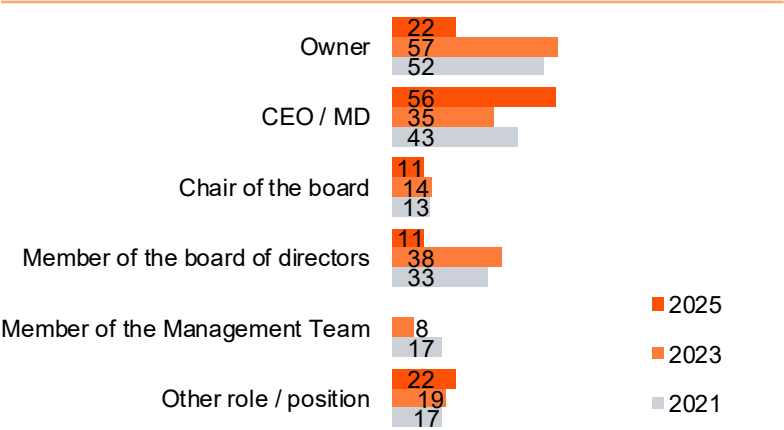
Shareholder Majority



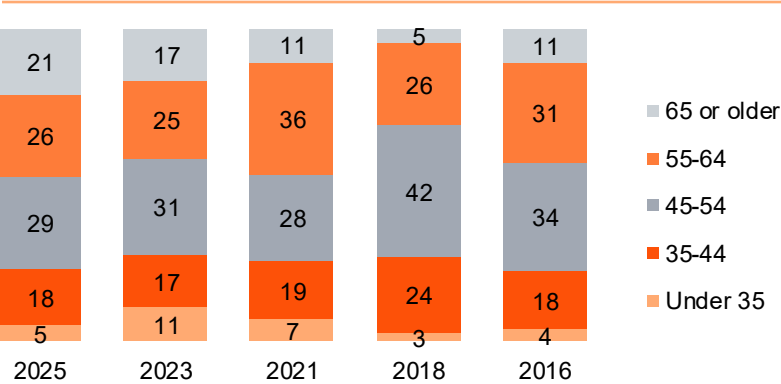
Respondent profile – who have we spoken to?

% Selected

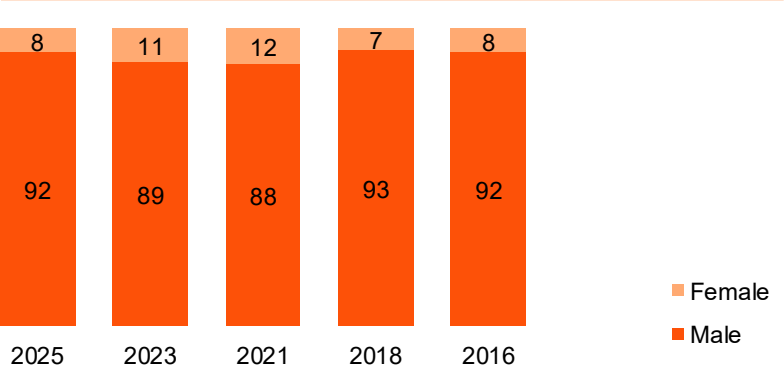
Current Job Role / Position



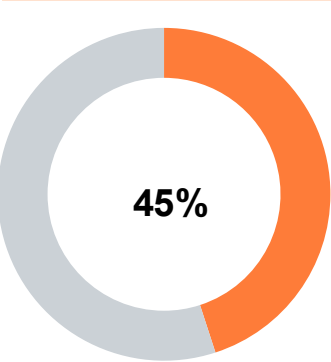
Age



Gender



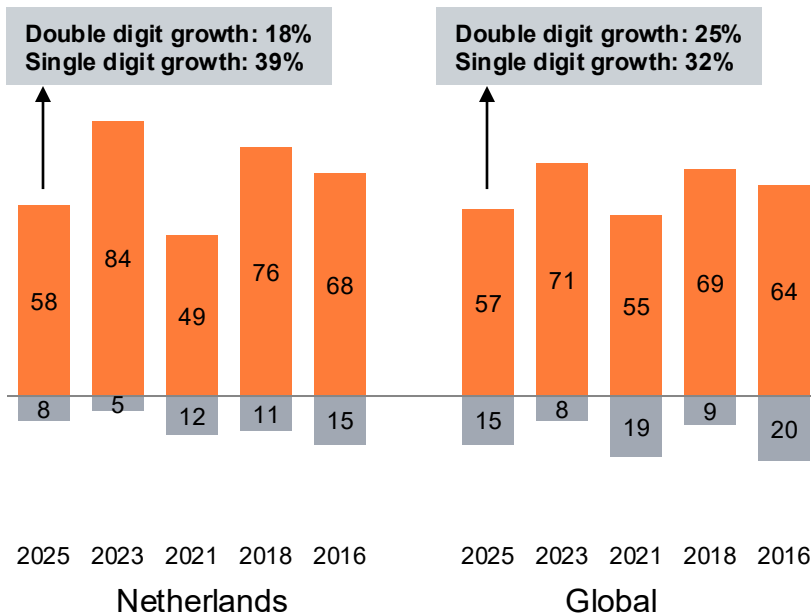
FBN Member (2025)



Dutch Family Businesses: Strong Growth Ambitions

% Selected

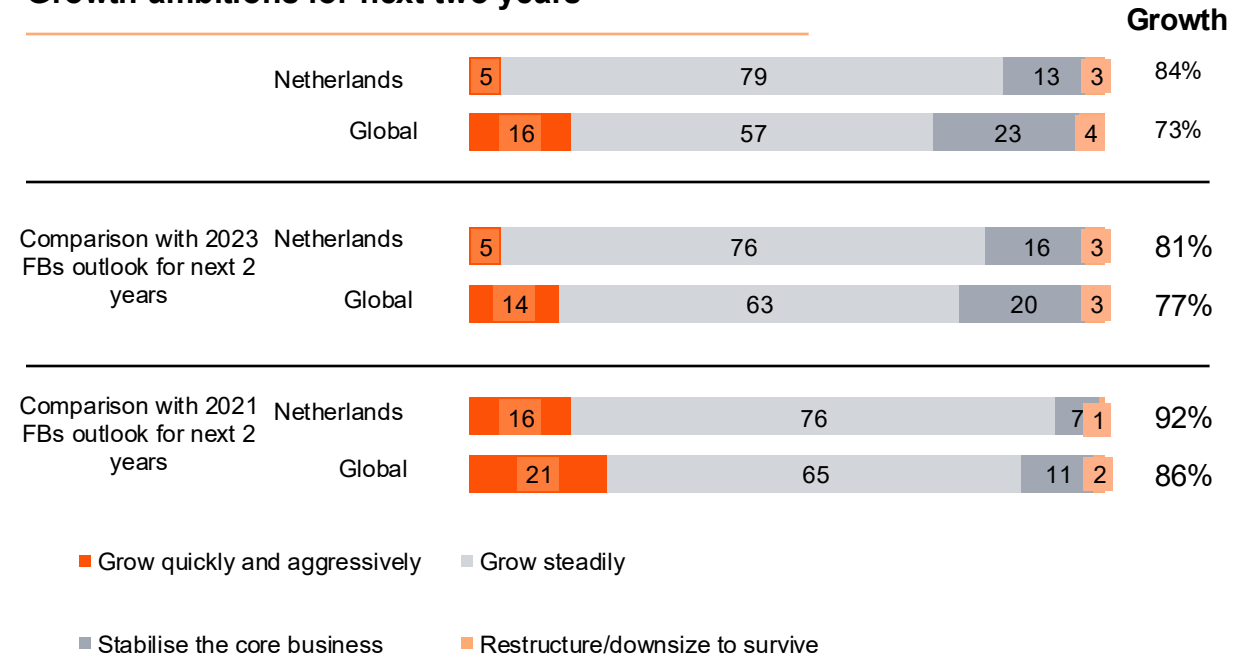
Growth in last financial year



■ Sales growth
■ Sales reduction

% Selected

Growth ambitions for next two years



Q3. Looking back over the last financial year would you say your sales have been: **Q4. Which of the following best describes your company's ambitions for the next two years?**

Base: all Global respondents (2025: n=1,325, 2023: n=2,043, 2021: n=2,801, 2018: n=2,817-2,950, 2016: n=2,802), all Netherlands respondents (2025: n=38, 2023: n=37, 2021: n=75; 2018: n=74; 2016: n=71)



Headline Findings for The Netherlands

01

Dutch Family Businesses Prioritize Purpose, Values, and Long-Term Trust

Dutch family businesses stand out for their clear company purpose, strong family values, and codified conduct. They are widely perceived as more trustworthy than non-family businesses and place high importance on maintaining their reputation, with 92% believing they have higher trust among stakeholders.



02

Agility and Cautious Adaptation Define Market Response

While Dutch family businesses show high agility—especially in operations and innovation—they tend to react quickly to market changes rather than proactively anticipate them. Their most common management response to disruption is cautious and incremental change.



03

Economic Volatility, Labor Shortages and Market Pressures are Top Challenges

Economic volatility, labor shortages, and intense competition are the most impactful megatrends and challenges. Market and competitive pressures, as well as talent development, are consistently cited as top concerns.



Headline Findings for The Netherlands

04

Leadership Succession and Generational Alignment are Strong, but Skills Gaps Remain

Most Dutch family businesses maintain original leadership succession timelines and demonstrate strong alignment between generations on key business priorities. However, preparing the next generation is challenged by skills gaps and differing visions for the company's future.



05

Innovation and Investment Focus on Sustainability and Core Business Expansion

Innovation is primarily funded by reinvested profits, with long-term sustainability as a key investment priority. Dutch family businesses are highly engaged in local community contributions and impact investing, and their current investment priorities are core business expansion and digital transformation.



06

Governance is Centralized, but Boards Lack Age, Gender and Industry Diversity

Dutch family businesses are highly centralized in ownership and decision-making, with boards that are small, family-dominated but often lacking in age, gender and industry diversity.





Leadership and Decision-Making in a Rapidly Changing World

04

Dutch Family Businesses Lead in Purpose-Driven Communication and SDG Alignment

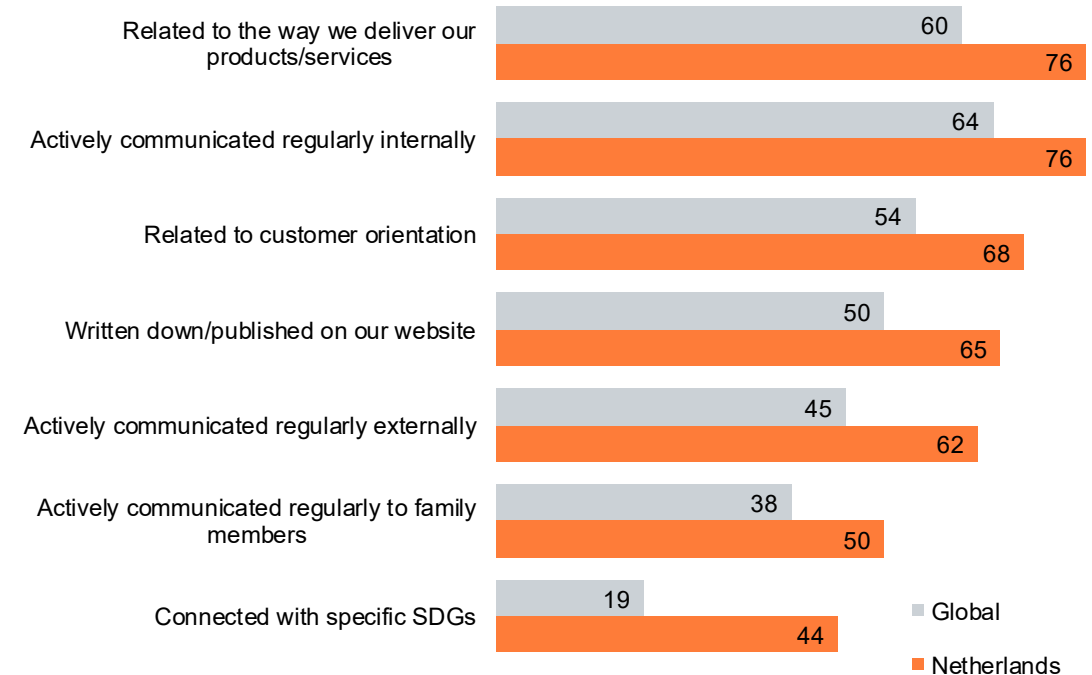
Have a clear company purpose
i.e. one that can be summed up /
articulated in one sentence

89%



% Selected

Which statements are true of your company's purpose? (among those who have a purpose)



Q6. Do you have a clear company purpose i.e. one that you could sum up or articulate in one sentence? Q6a. Which of these statements are true of your company's purpose:

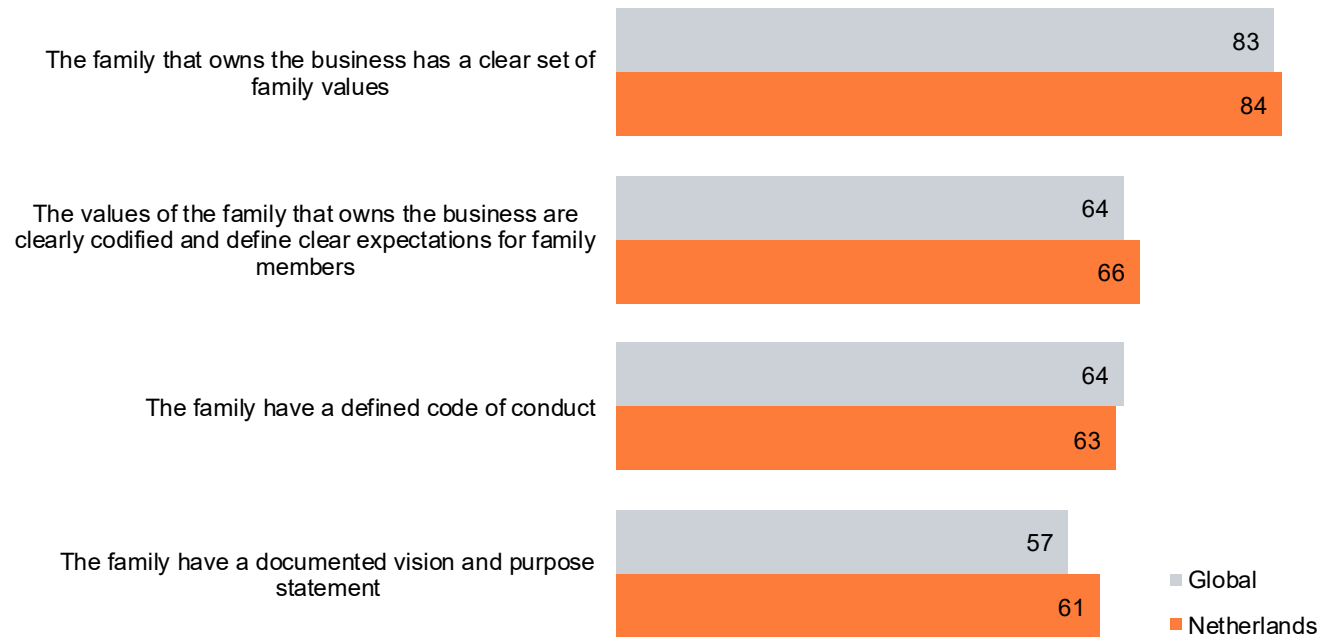
Base: all Global respondents (2025: n=1,325), all Global respondents that have a company purpose (2025: n=1,064), Netherlands respondents (n=38), Netherlands respondents that have a company purpose (n=38)



Strong Family Values and Codified Conduct Define Dutch Family Businesses

% Selected (3-4/4)

Agreement with statements



Q7. How strongly do you agree or disagree that...

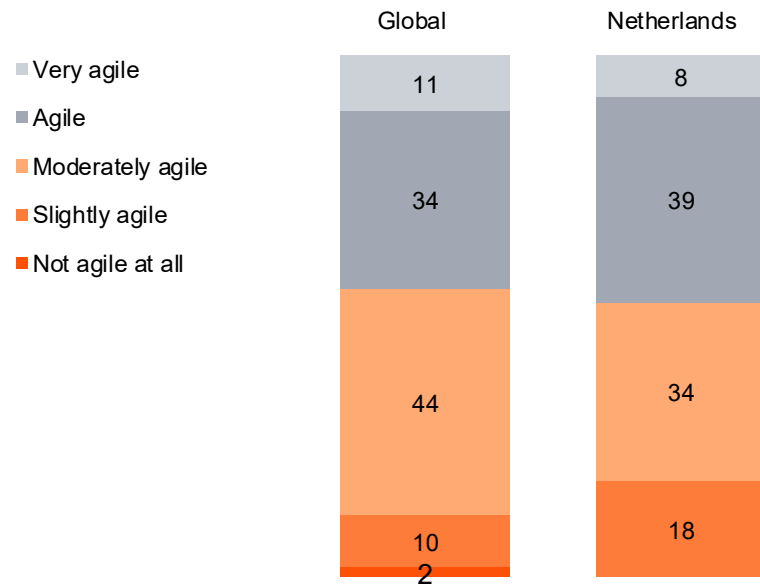
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Dutch Family Businesses show High Agility, especially in Operations and Innovation

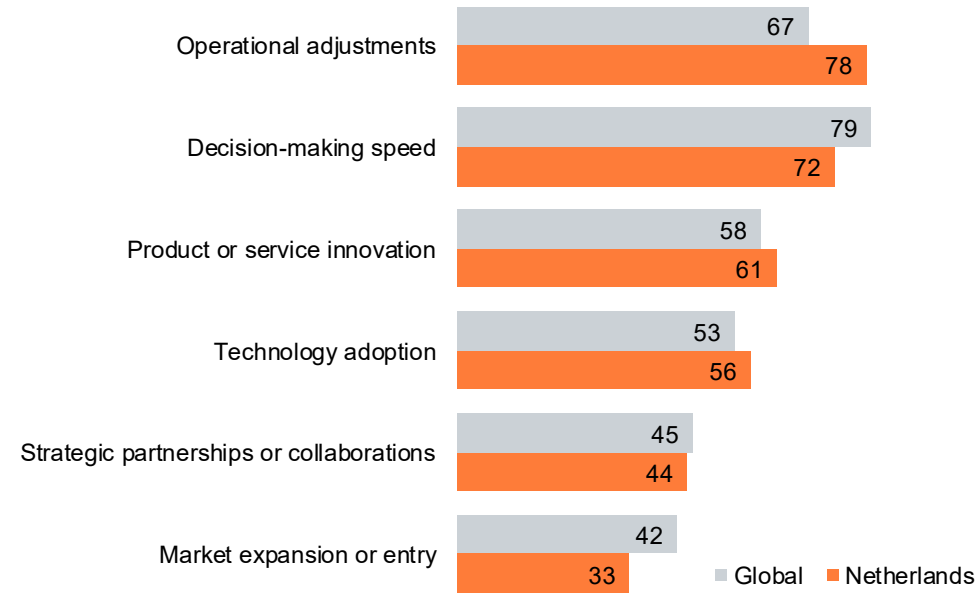
% Selected

Agility levels



% Selected among those who selected Agile

Areas agility has been most evident in their business



Q10. How would you rate your company's agility in responding to market changes, customer demands, and operational challenges over the past year?

Q10a. In what areas has this agility been most evident in your business?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38), Base: those who say their company is T2B 'Agile' (n=592), Netherlands respondents who say their company is T2B 'Agile' (n=18)



Continuous Market Change and Intense Competition shape the Dutch Family Business Environment

% Agree (3-4/4)

Agreement with the following statements about the market environment in which their company operates

■ Global ■ Netherlands



Q9. How much do you agree with the following statements about the market environment in which your company operates?

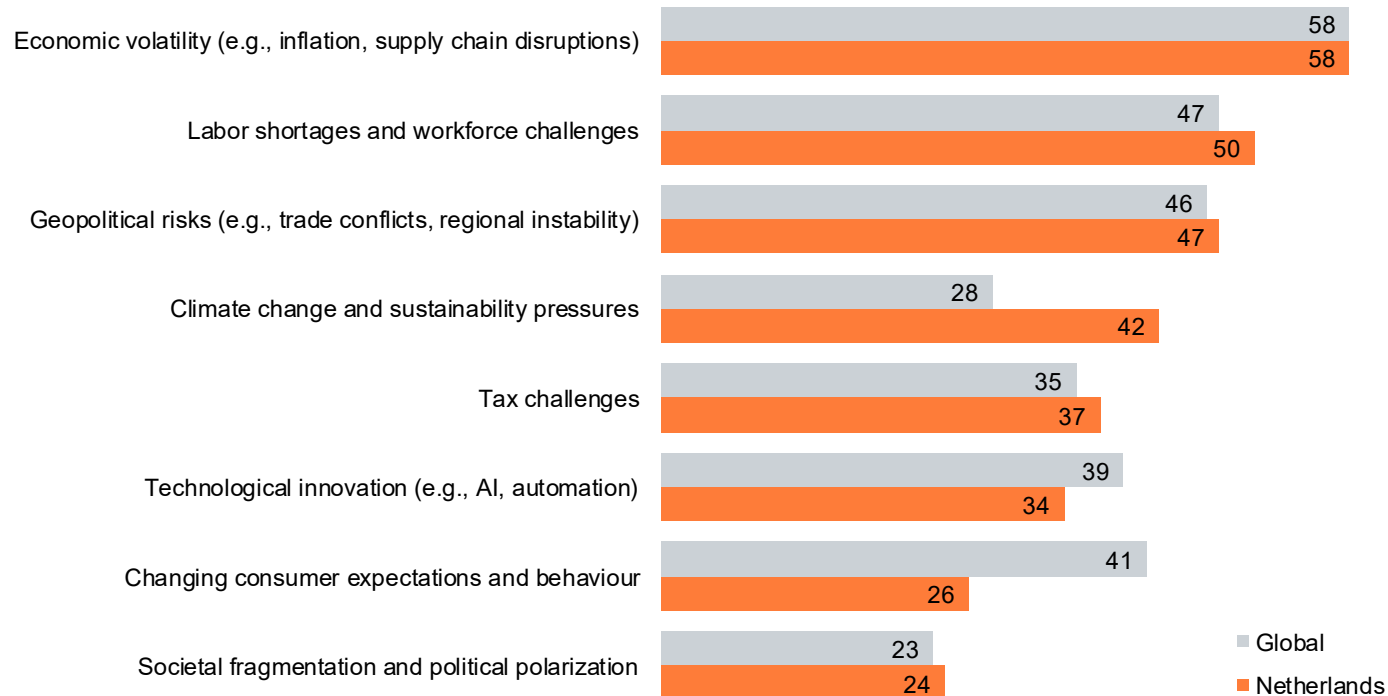
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Economic Volatility and Labor Shortages are the most Impactful Megatrends

% Selected 'More Impact' (4-5/5)

% Selected 'More Impact' (4-5/5)



Q11. How significantly have the following global megatrends impacted your family business in the past year?

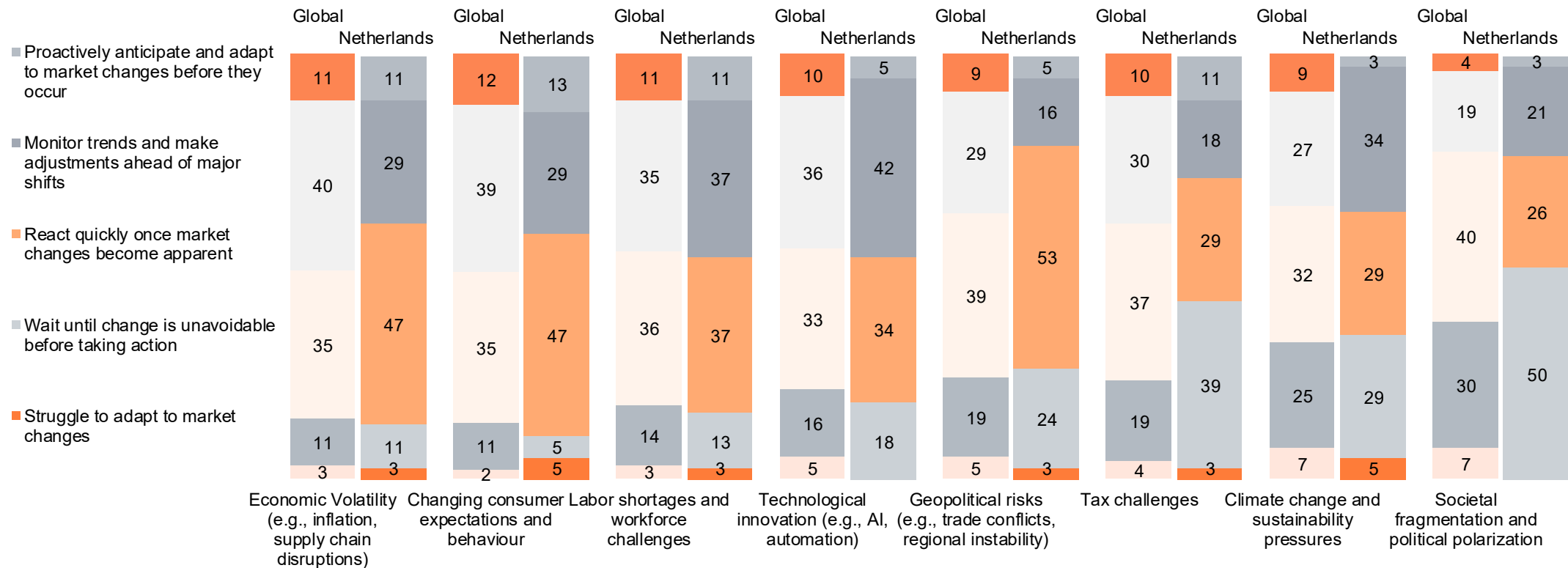
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Dutch Family Businesses react Quickly but rarely Proactively to Market Trends

% Selected

Response types to market trends:



Q12. For each of the market trends below, which statement best describes how your company responds?

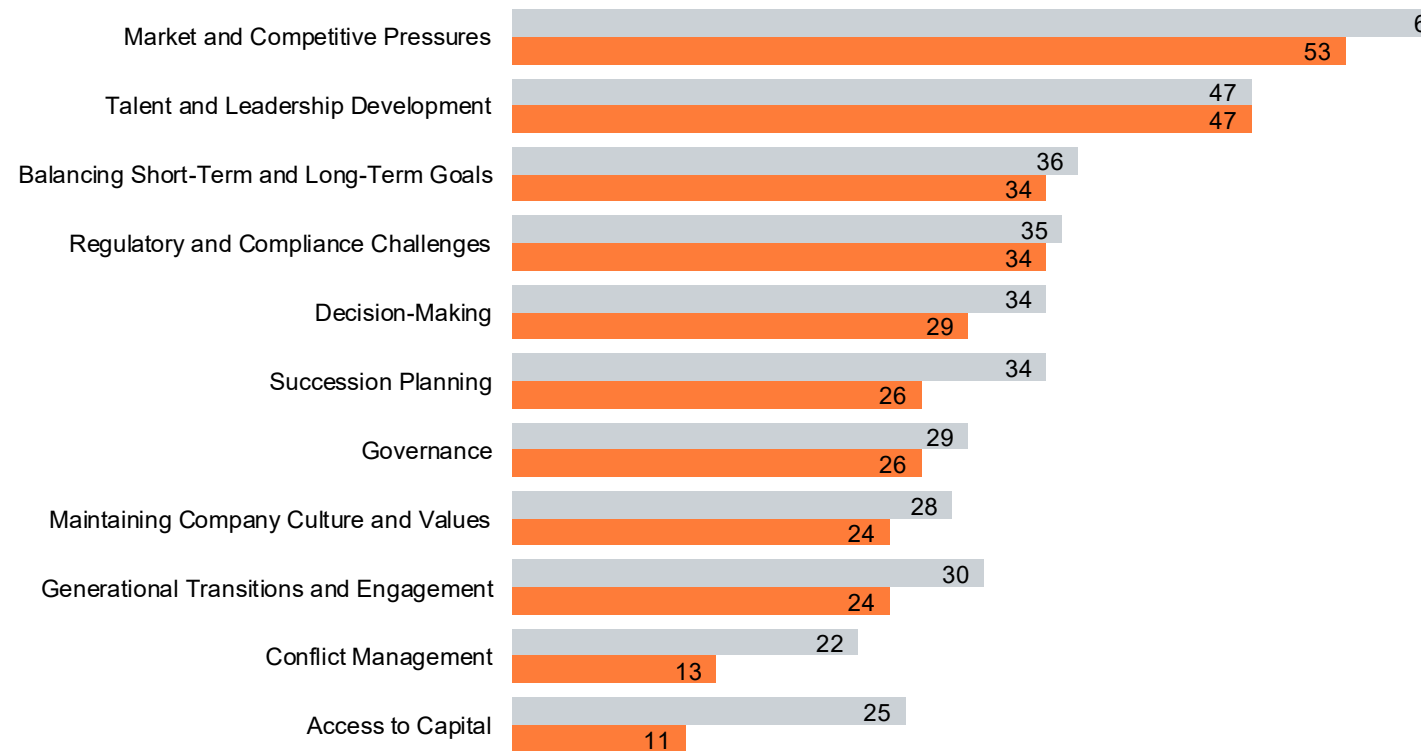
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Market Pressures and Talent Development are Top Challenges for Dutch Family Businesses

% Selected 'More Impact' (4-5/5)

Key challenges impacting family businesses:



Q13. Which of the following challenges have impacted you in the past year? Q13. Which of the following challenges have impacted you in the past year?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Cautious and Incremental Change is the Most Common Management Response to Disruption

% Selected

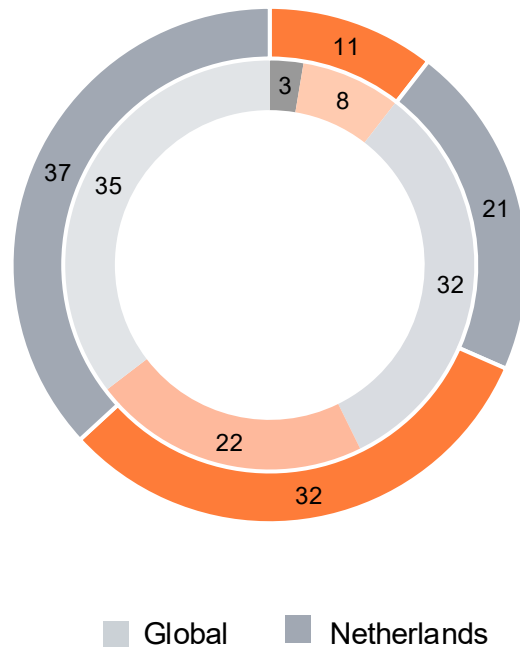
Management response to market disruption or significant industry changes:

Cautious Approach

Make incremental changes but largely stick to familiar management styles and decision-making processes.

Actively Innovate

Rethink management strategies, implement new leadership approaches, and embrace adaptive decision-making.



Fully Reinvent Approach

Disruptions push us to fundamentally change how we lead and manage the business.

Entrench Deeply

Double down on traditional strategies, minimize risk, and focus on protecting core business operations.

Selectively Experiment

Test new management approaches in certain areas while maintaining stability in others.

err on the side of caution and make incremental changes while sticking to familiar management styles and decision-making processes.

37%

35% of global family businesses take a cautious approach

Q14. During times of market disruption or significant industry changes, how does your family business typically respond in terms of management approach?

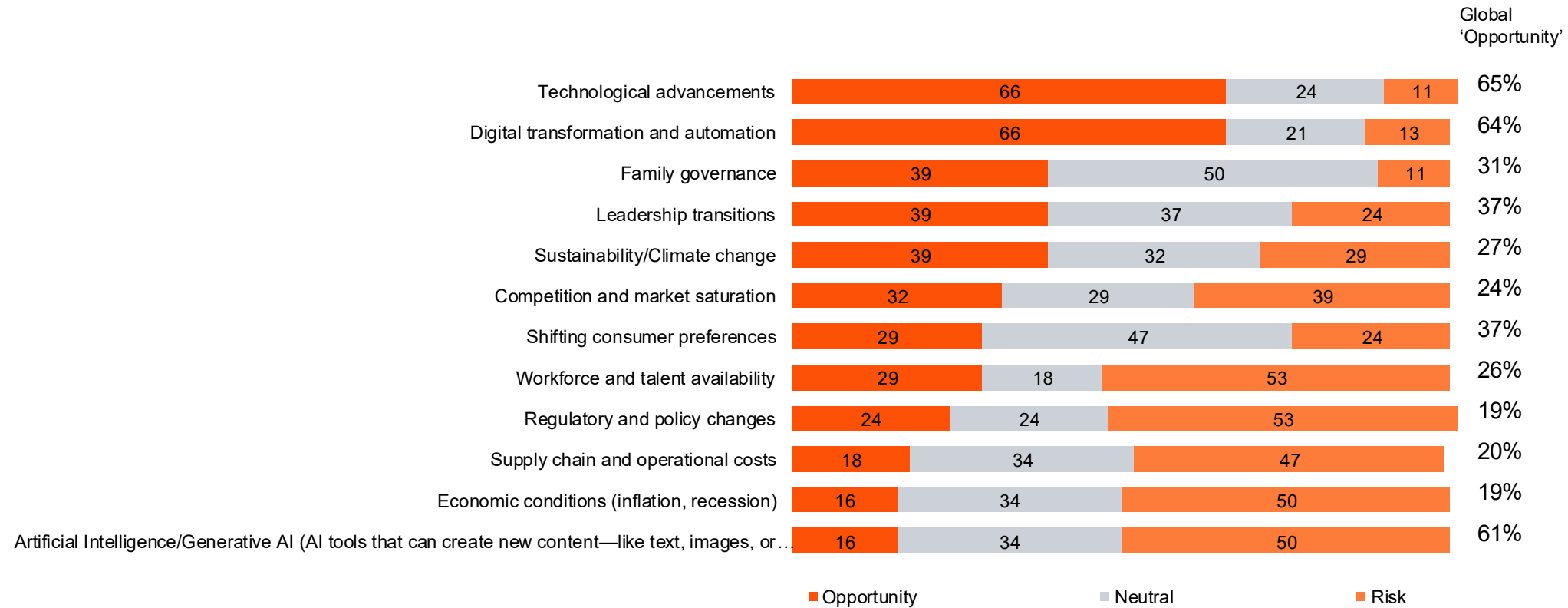
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Technological Advancements and Digital Transformation are seen as Key Opportunities, but also Risks

% Selected Opportunity (4-5/5) / 'Risk' (1-2/5)

Areas of opportunities and risk for family businesses



Q15. For each of the following factors, indicate whether you see it primarily as a risk to minimize or an opportunity for growth in your family business.

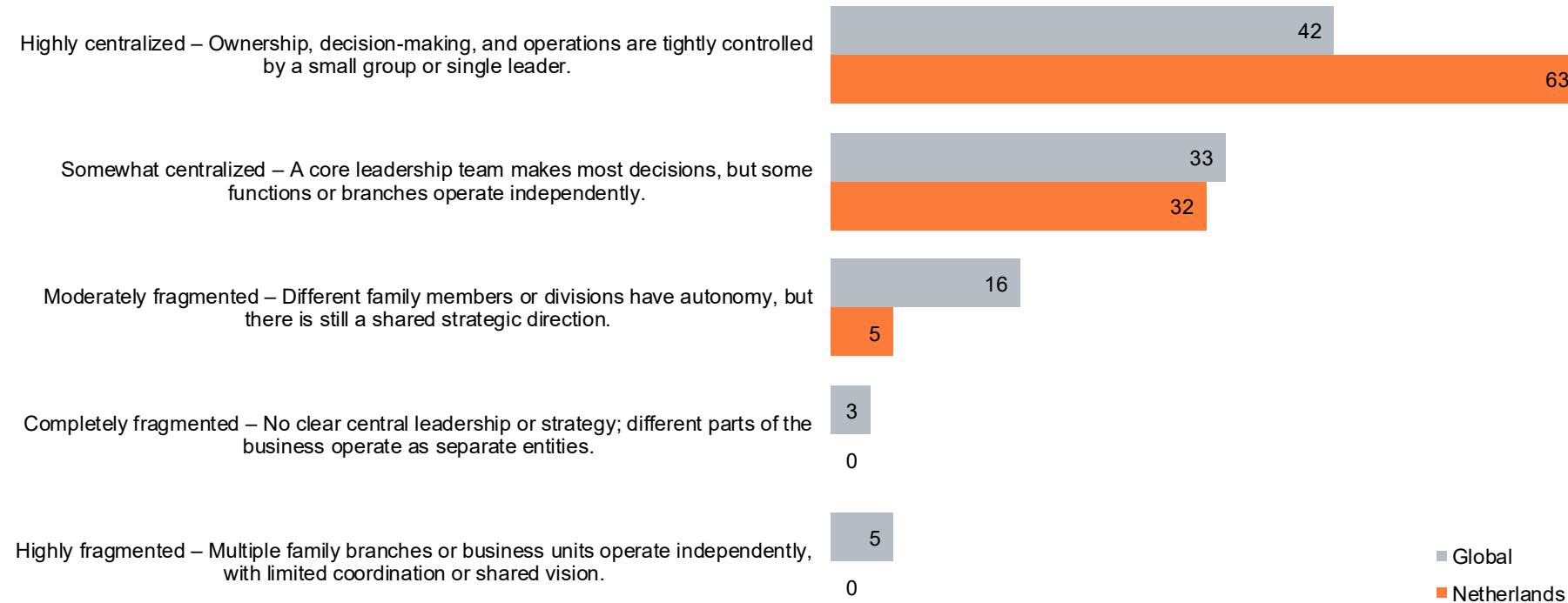
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Dutch Family Businesses are Highly Centralized in Ownership and Decision-Making

% Selected

Level of fragmentation across ownership, decision-making, and operations:



Q16. How would you describe the level of fragmentation within your family business across ownership, decision-making, and operations?

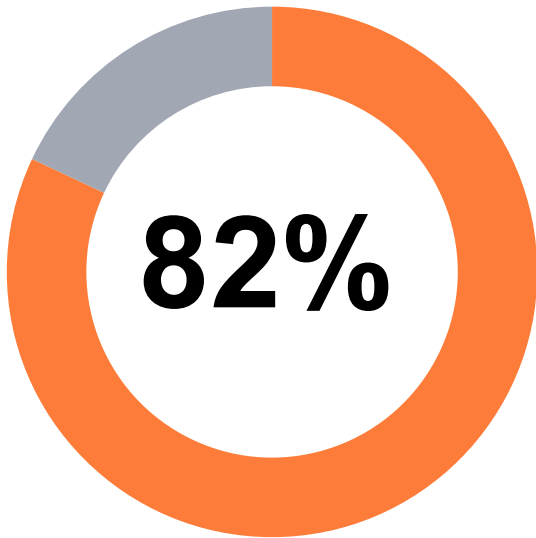
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Maintaining Reputation is Crucial, but Perceived Vulnerability remains Moderate

% Selected

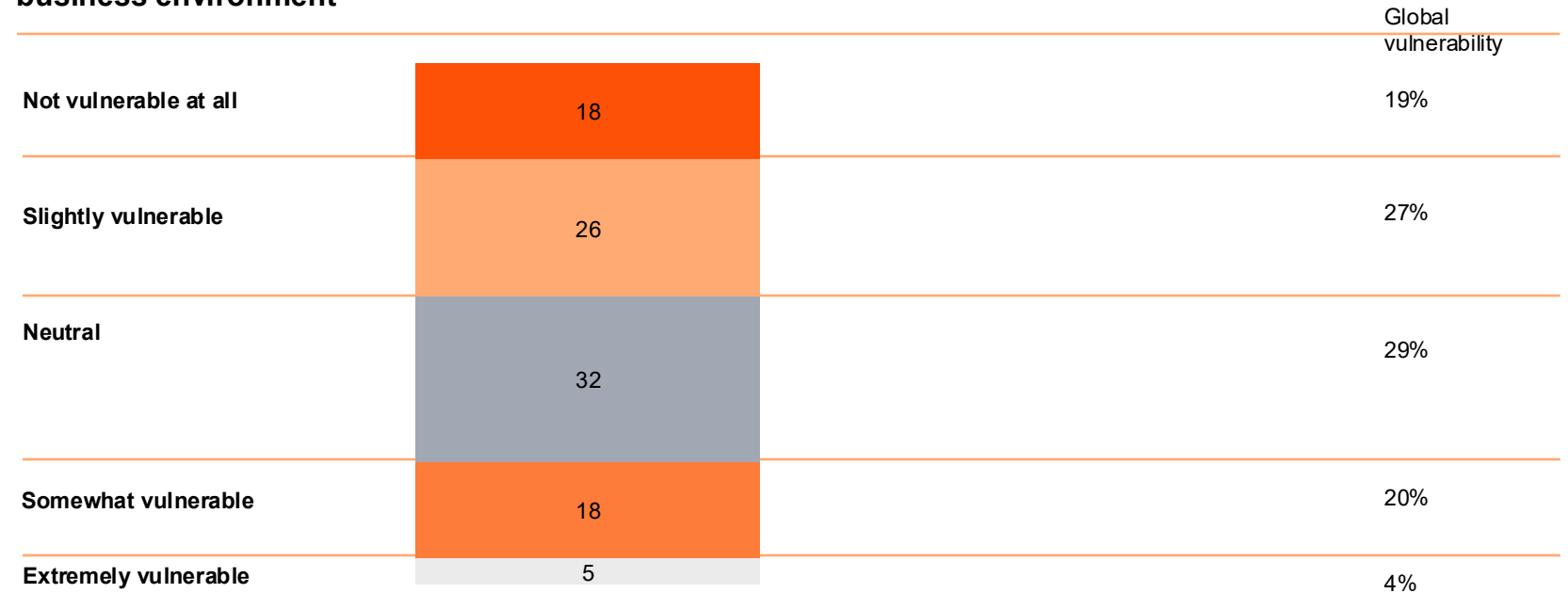
Those that said maintaining the family business's reputation is 'Very Important'



78% of global family businesses said 'Very Important'

% Selected

Level of vulnerability of the family business in the current business environment



Q17. How important is maintaining your family business's reputation to you? Q18. How vulnerable do you feel your family business's reputation is in the current business environment?

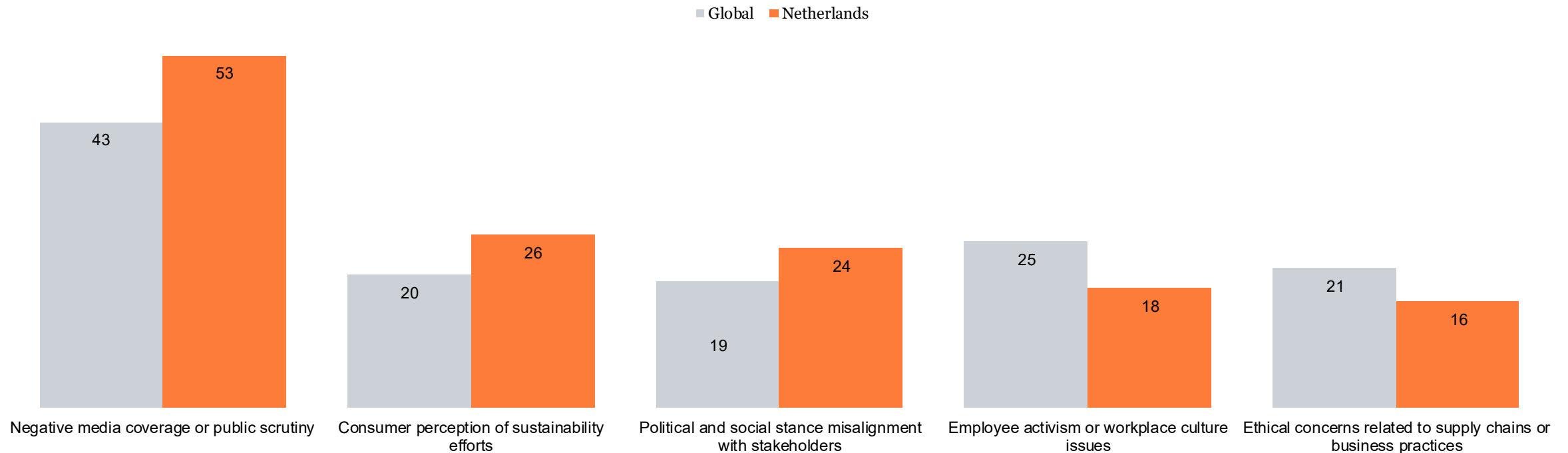
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Negative Media Coverage and Sustainability Perceptions are the Greatest Reputation Risks

% Selected

Greatest risk factors to their business's reputation



Q19. Which of the following factors pose the greatest risk to your business's reputation?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Dutch Family Businesses are Perceived as More Trustworthy than non-Family Businesses

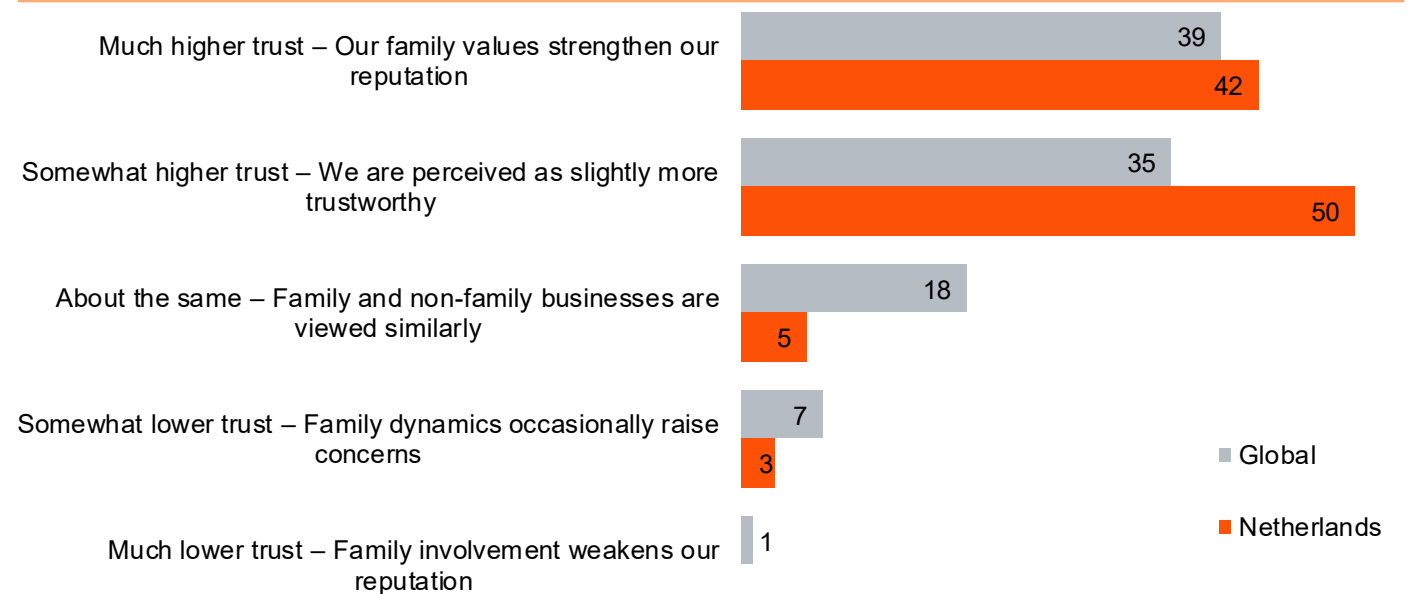
92%

of Dutch family business leaders say their family business has higher trust compared to non-family businesses in terms of trust and reputation with customers, employees and partners. (% Select 1-2/5)

74% globally

% Selected

Level of trust in family business in terms of trust and reputation with customers, employees and partners, compared to non-family businesses:



Q20. How do you think your family business compares to non-family businesses in terms of trust and reputation with customers, employees and partners?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Long-Term Objectives take Priority over Short-Term Profitability for most Dutch Family Businesses

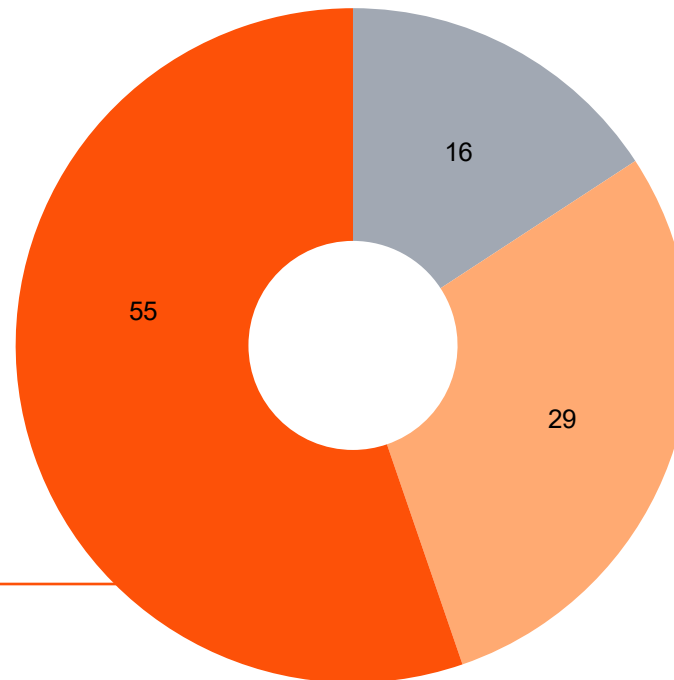
% Selected

How family businesses balance long-term goals with short-term financial pressures:

Over Half

of Dutch family business leaders
prioritize our long-term objectives even
at the expense of short-term profitability

34% globally



We don't have long-term goals
3% globally

We prioritize immediate/short-term returns and profitability over long-term returns/growth
12% globally

We balance both equally
51% globally

Q21. How does your family business balance long-term goals with short-term financial pressures?

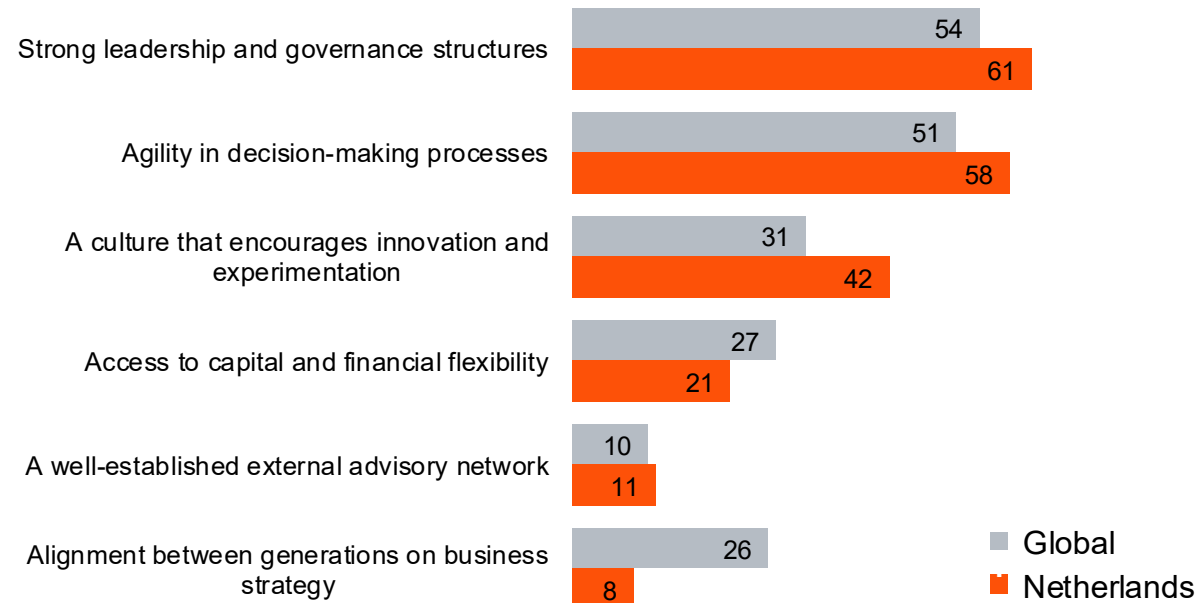
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Strong Leadership and Agility enable Change; Uncertainty and Expertise Gaps hinder Adaptation

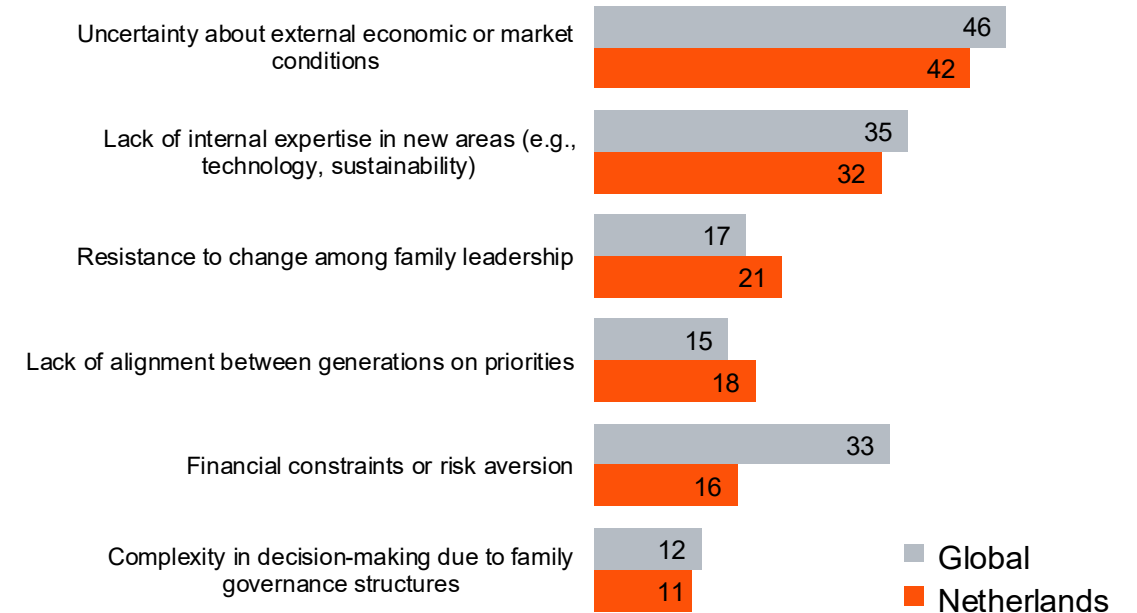
% Selected

Factors best enabling family businesses to adapt to change:



% Selected

Factors most hindering family businesses from adapting to change:



Q22. Which of the following factors best enable your family business to adapt to change? Q23. What most often delays or prevents your family business from adapting to change?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



External Events and Expansion Opportunities most often Trigger Strategic Shifts

% Selected

Most recent triggers of a significant strategic shift in family businesses:

24	Major external events (e.g., regulatory changes, geopolitical shifts) (15% globally)
21	Opportunities for expansion or diversification (21% globally)
16	A major leadership transition (e.g., generational succession, appointment of new leadership) (20% globally)
16	A financial crisis or significant business challenge (e.g., declining revenue, profitability concerns) (18% globally)
11	A shift in consumer expectations or behaviour (10% globally)
8	Employee or customer demands for transformation (4% globally)
5	Competitive pressure from new market entrants (10% globally)

Q24. Which of the following has most recently triggered a significant strategic shift in your family business?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Long-Term Perspective and Employee Commitment are Key Competitive Advantages

% Selected

Biggest competitive advantages associated with the family-owned business status:



% Selected

Level of advantage of being a family business:

76%

Believe family businesses have a moderate to significant advantage compared to non-family businesses when responding to market disruptions and industry changes

63% globally

29%

Believe family businesses have a significant advantage

22% globally

Q25. In today's business environment, which of the following do you feel are competitive advantages associated with your business's family-owned status? Q26. Do you believe family businesses have an advantage or disadvantage compared to non-family businesses when responding to market disruptions and industry changes?

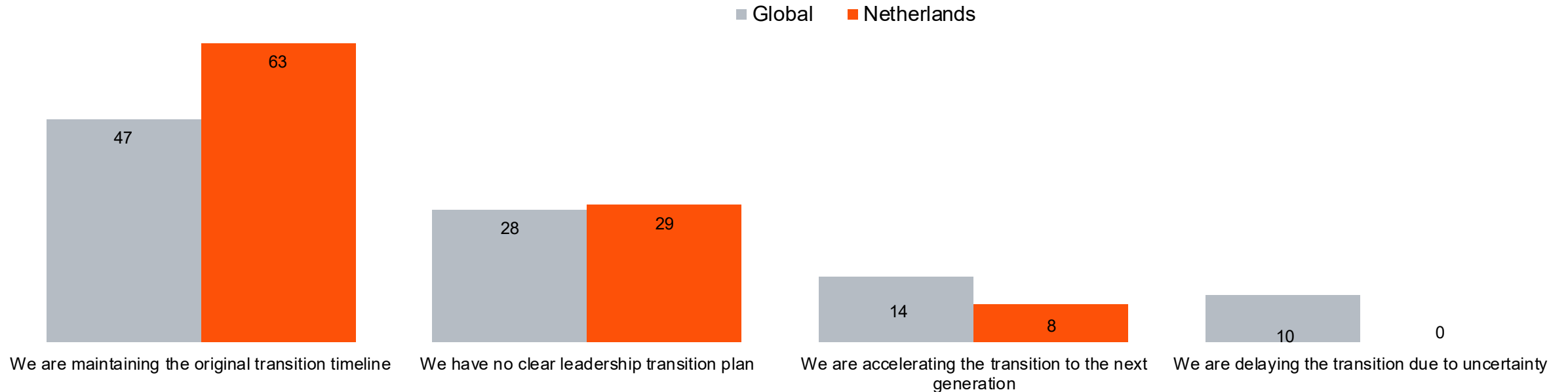
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Most Dutch Family Businesses Maintain Original Leadership Succession Timelines

% Selected

Ways family businesses adjusted the timeline for leadership succession due to industry changes and business dynamism:



Q27. How has your family business adjusted the timeline for leadership succession due to industry changes and business dynamism?

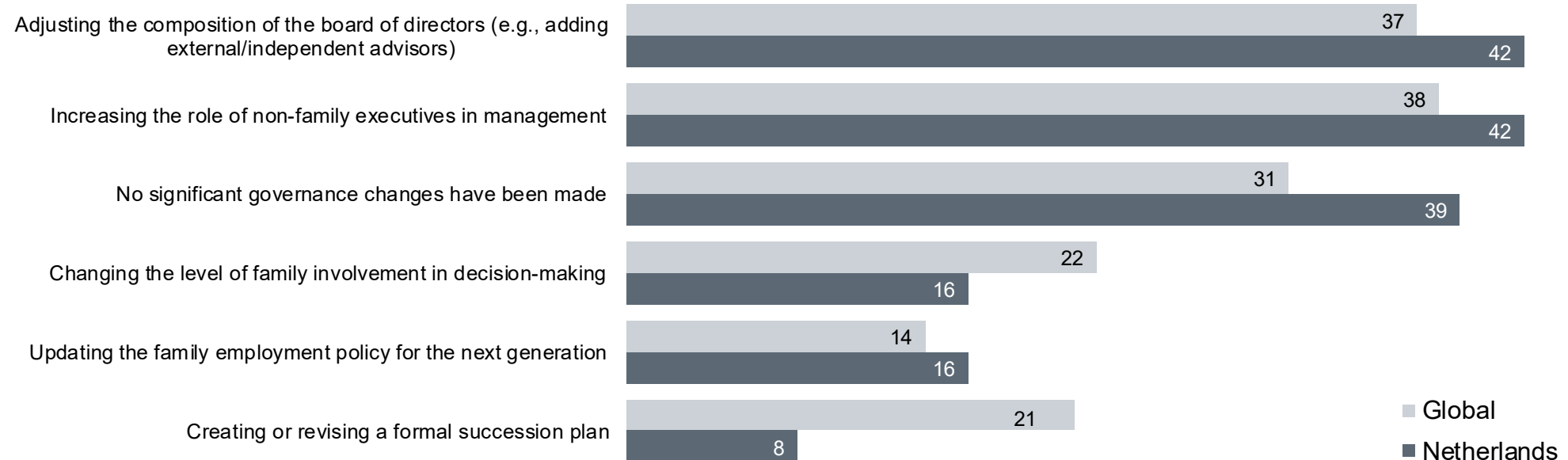
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Board Composition and non-Family Management Roles are the most Common Governance Changes

% Selected

Changes considered or implemented to maximize opportunities and navigate business challenges in response to market changes:



Q28. Which of the following governance changes has your family business considered or implemented to maximize opportunities and navigate business challenges in response to market changes?

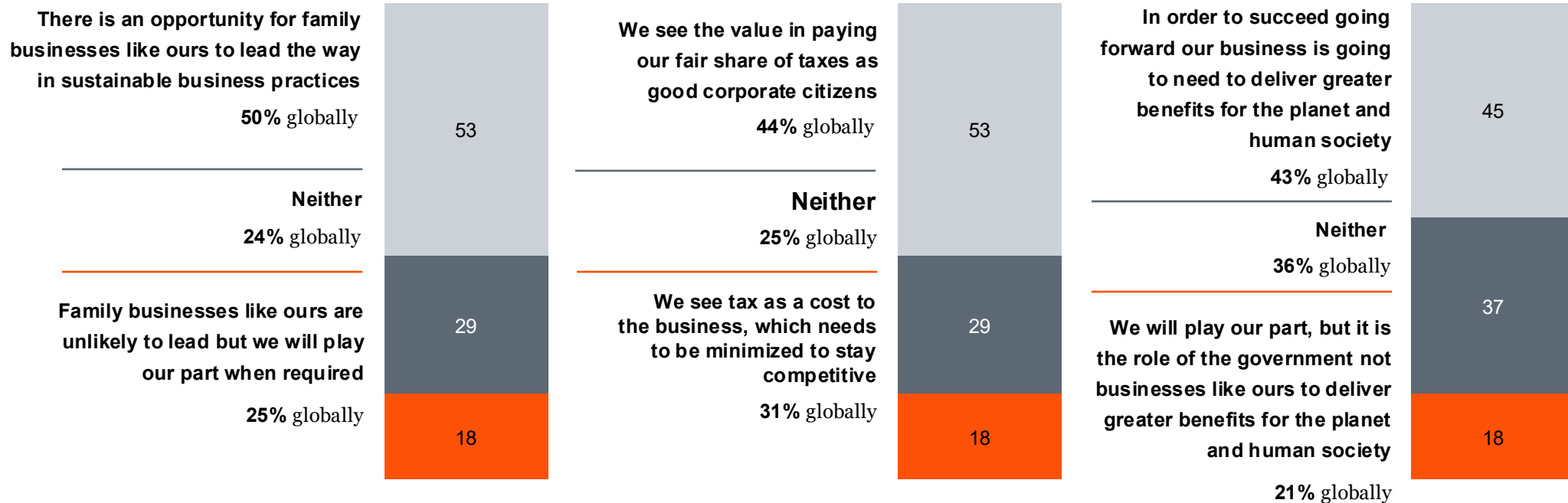
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Dutch Family Businesses see Opportunity to Lead in Sustainability and Societal Impact

% Selected

How family business leaders feel about the role of their family business today:



Q29. Which of the statements below best describes the way you feel about the role of your family business today?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)





Generational Dynamics and Talent Development

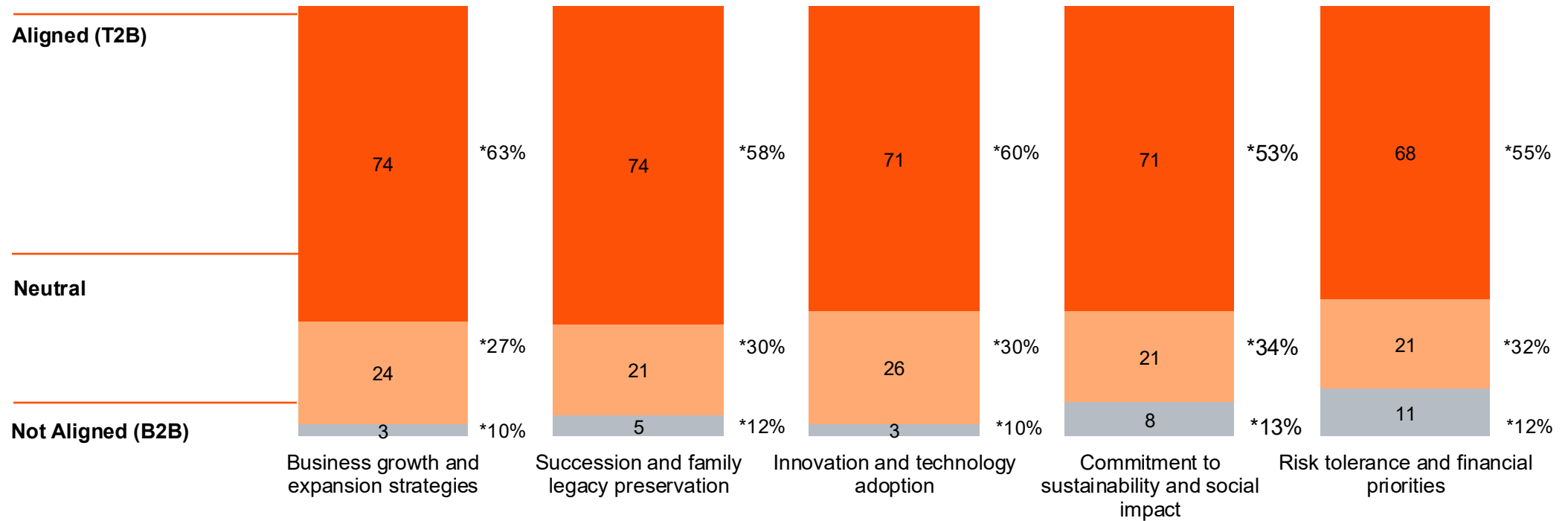
02

Strong Alignment Between Generations on Key Business Priorities, but Value Differences Remain

% Selected

Alignment between current and next generation on key business priorities:

*global family businesses



Q30. How aligned are the current and next generation on key business priorities? Q33. Would you say family conflict is something that...

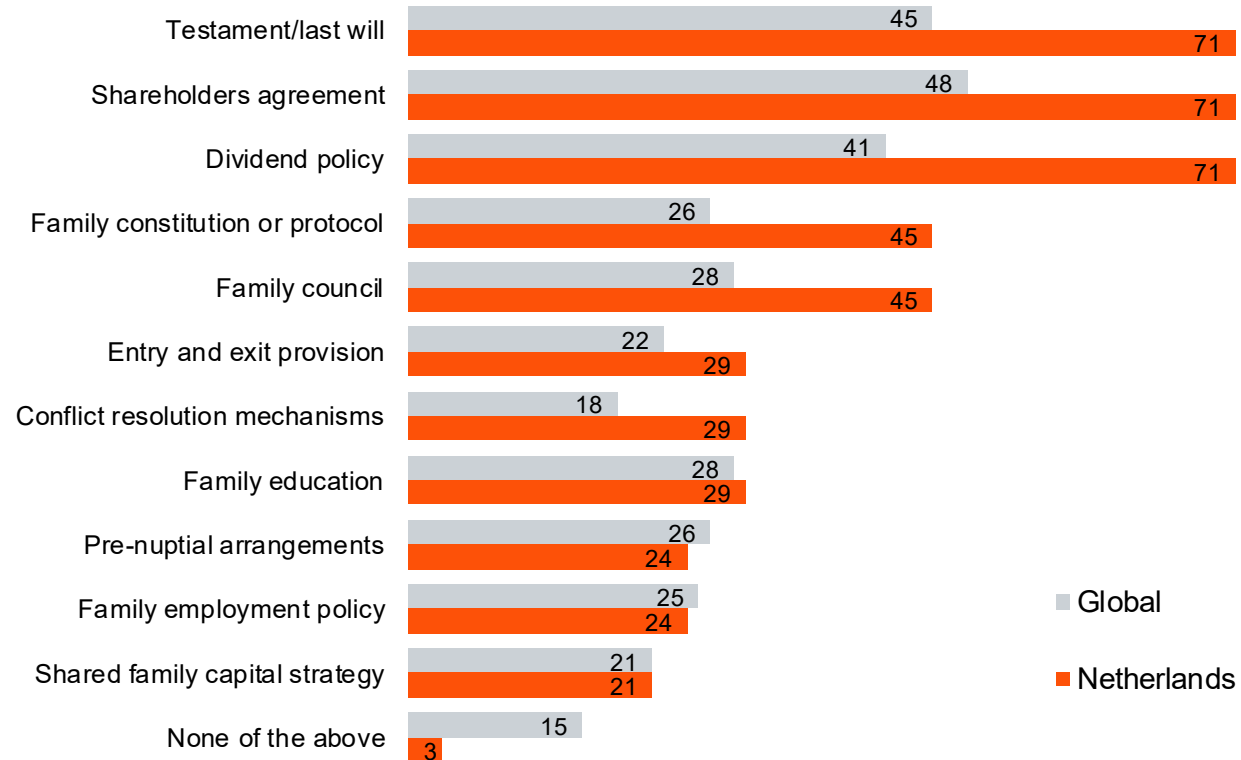
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Strong Alignment Between Generations on Key Business Priorities, but Value Differences Remain

% Selected

Governance policies in place



Q31. Which of the following policies and procedures, if any, do you have in place?

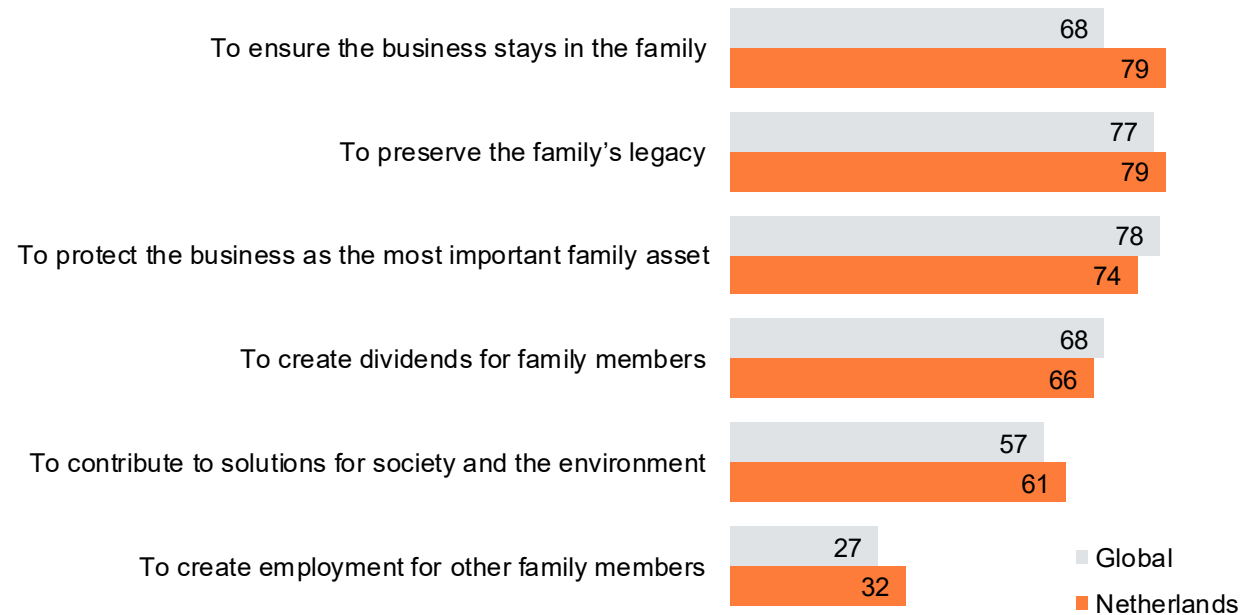
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Long-Term Goals: Family Continuity, Legacy, and Societal Contribution are Top Priorities

% Selected 'Important' (4-5/5)

Importance of longer-term goals



Q32. How important are the following longer-term goals to you (i.e. over the next five years or longer)?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



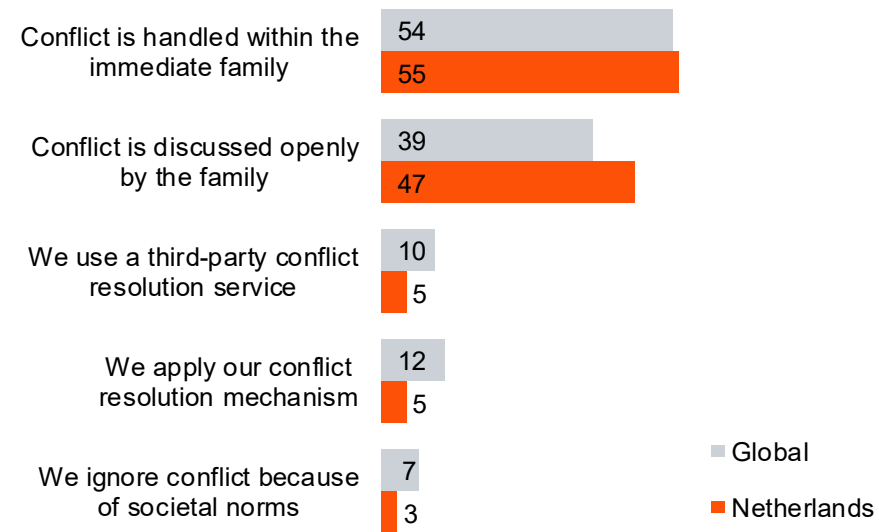
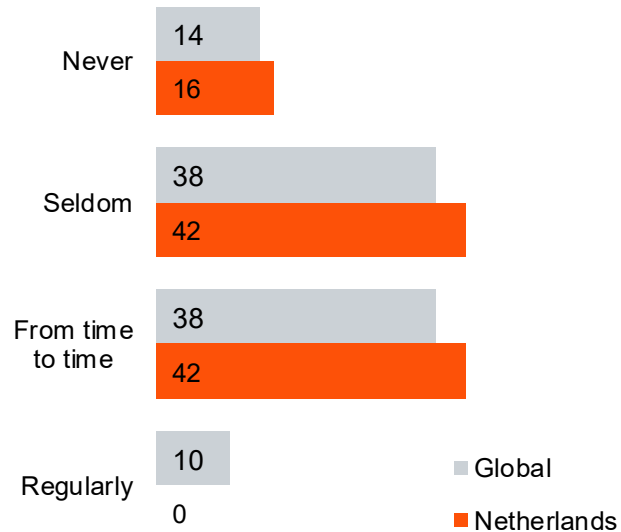
Family Conflict is Rare and usually Managed Internally or through Open Discussion

% Selected 'Important' (4-5/5)

% Selected 'Important' (4-5/5)

Does family conflict within the business occur?

How is this conflict handled? (among those experiencing it at least seldomly)



Q33. Would you say family conflict within the business is something that: **Q34. Which of the following (if any) describe how family conflict is handled at your company?...**

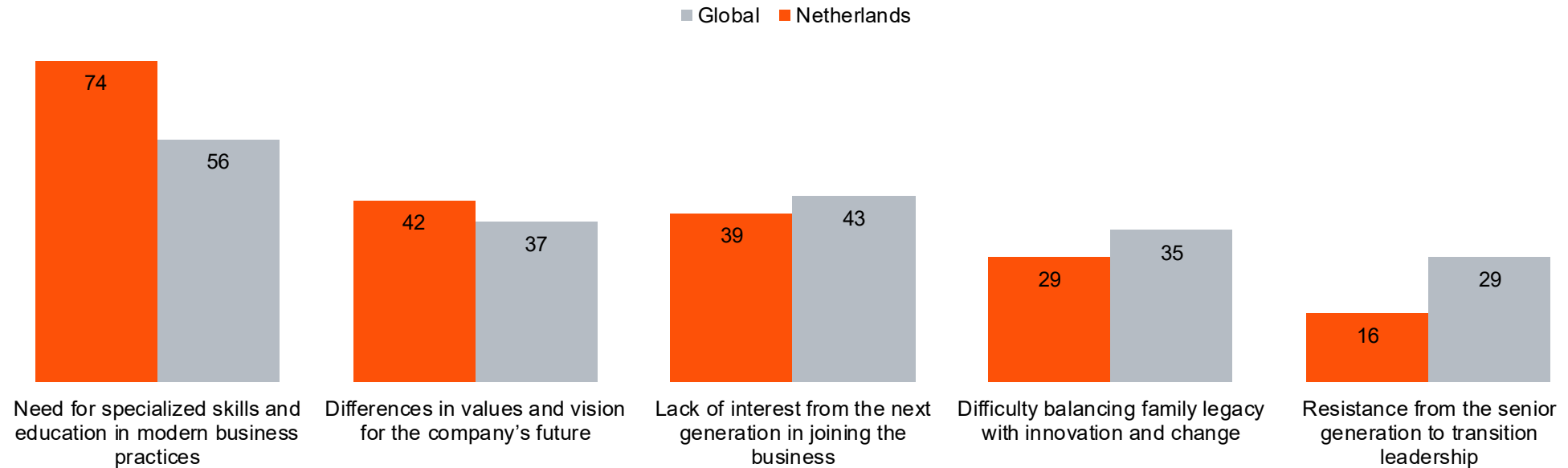
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Preparing the Next Generation: Skills Gaps and Differing Visions are the Biggest Challenges

% Selected (ranked top 2)

Ranked - Challenging for Next Gen preparation



Q35. What are the most significant challenges in preparing the next generation for leadership?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)





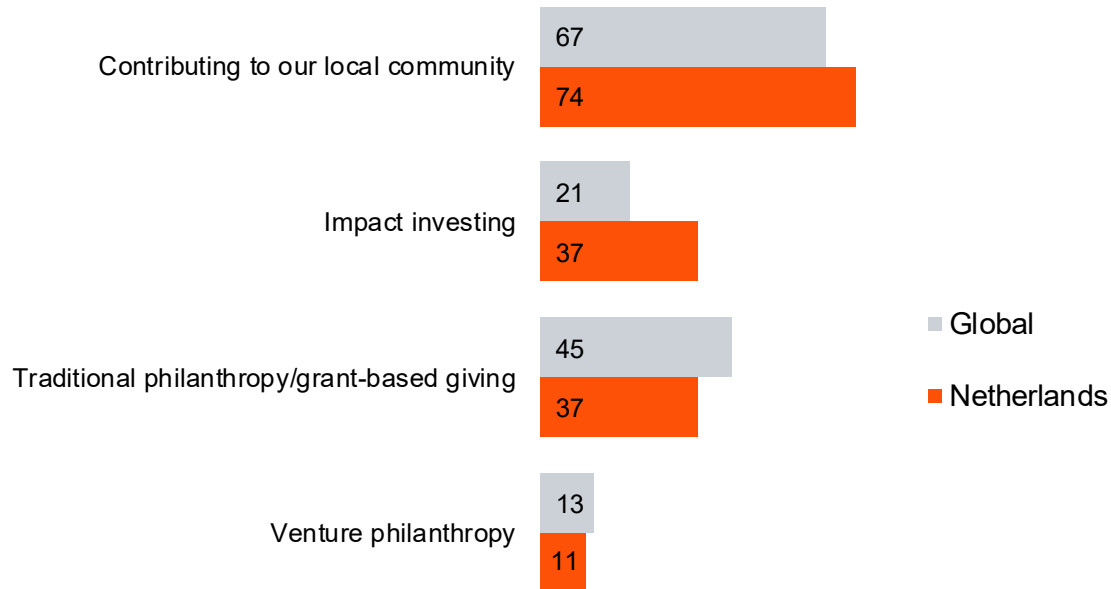
Innovation and Sustainability through Capital Deployment

03

Dutch Family Businesses are Highly Engaged in Local Community Contributions and Impact Investing

% Selected

Local community contributions / philanthropy businesses engaged in



Q8. Which, if any, of the following does the business or the family owning the business engage in?

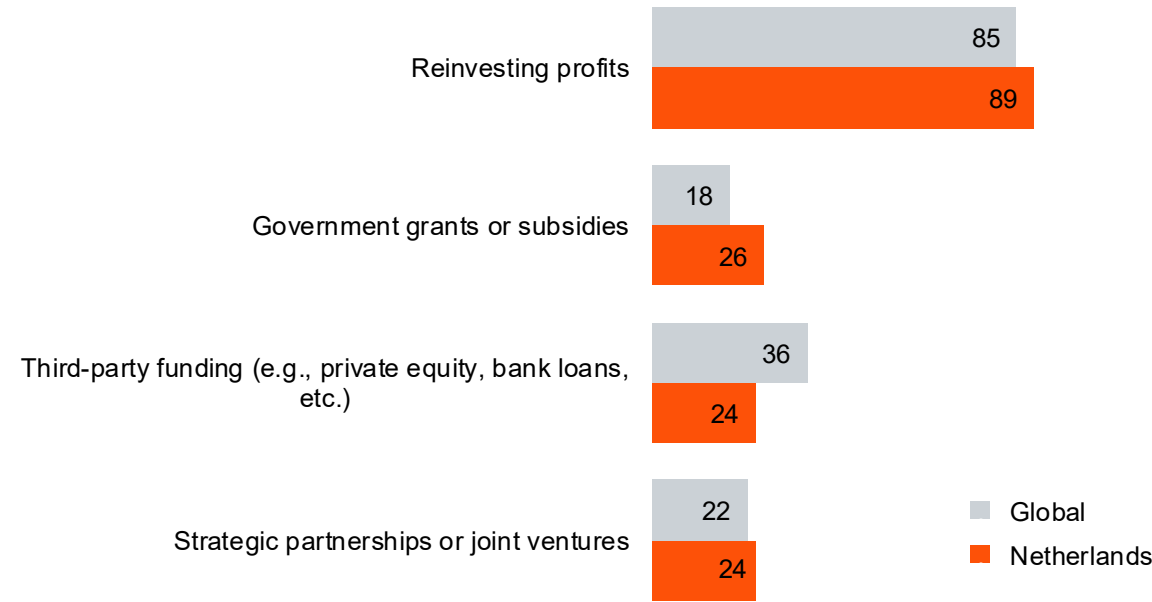
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Innovation is Primarily Funded by Reinvested Profits; Long-Term Sustainability is a Key Investment Priority

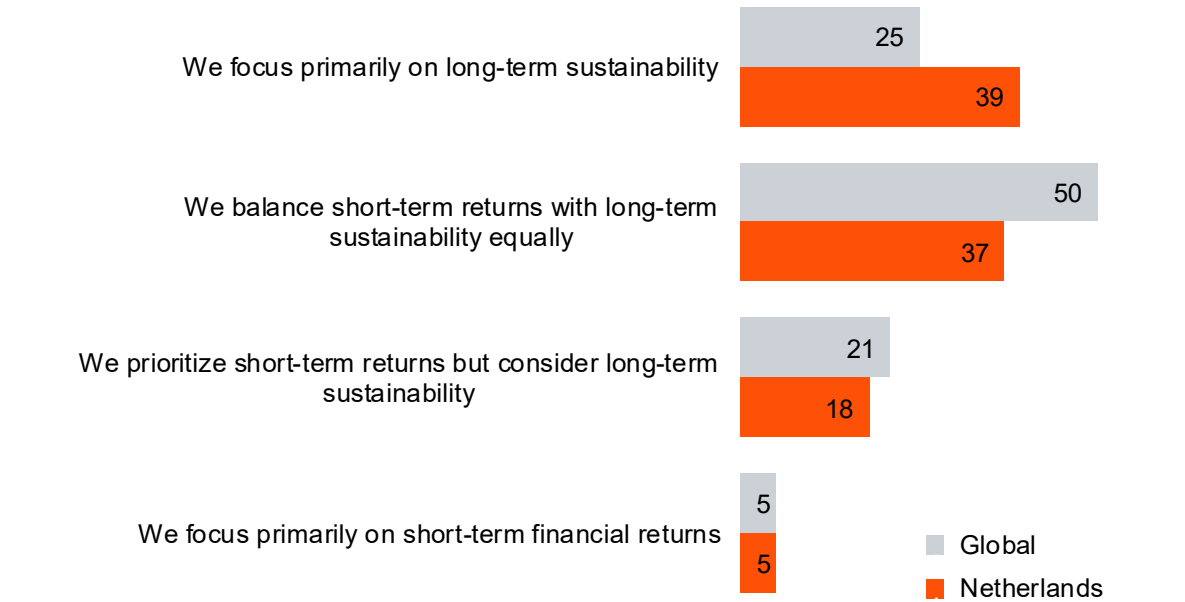
% Selected

How do you fund innovation in your business?



% Selected

How businesses prioritize short-term financial returns and long-term sustainability



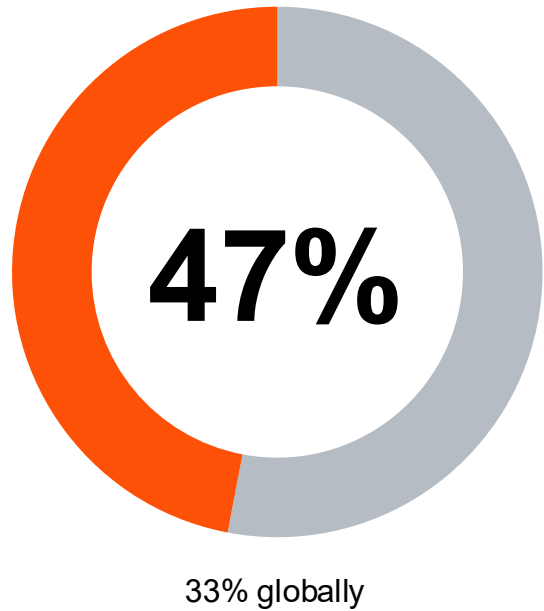
Q36. How do you fund innovation in your business? Q39. When considering capital investments, how do you prioritize short-term financial returns and long-term sustainability?
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Nearly Half of Dutch Family Businesses have a Family Office, Mostly Single Family Offices

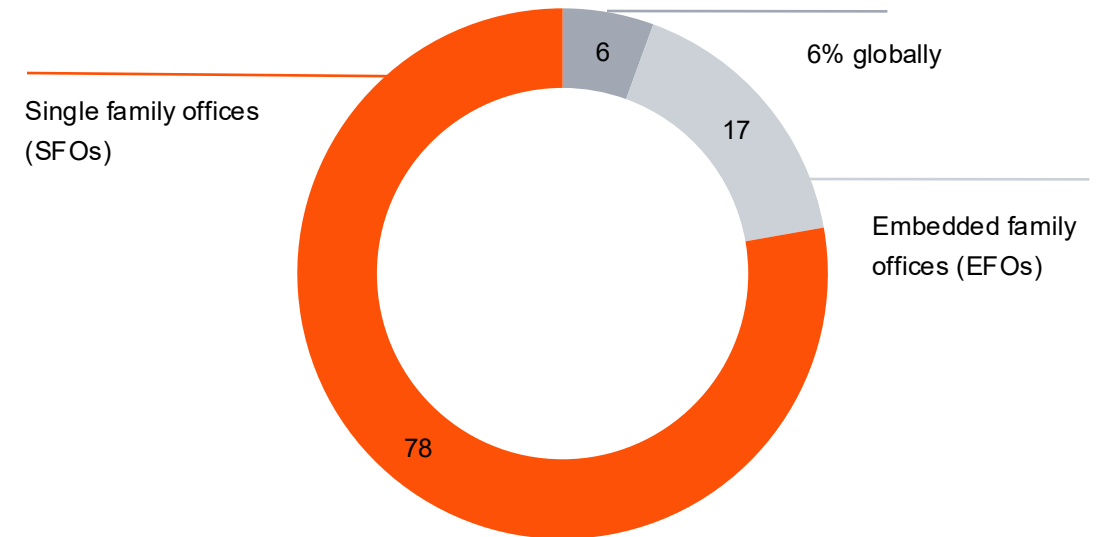
% Selected

Those that have a family office



% Selected

Type of family office for those that have a family office

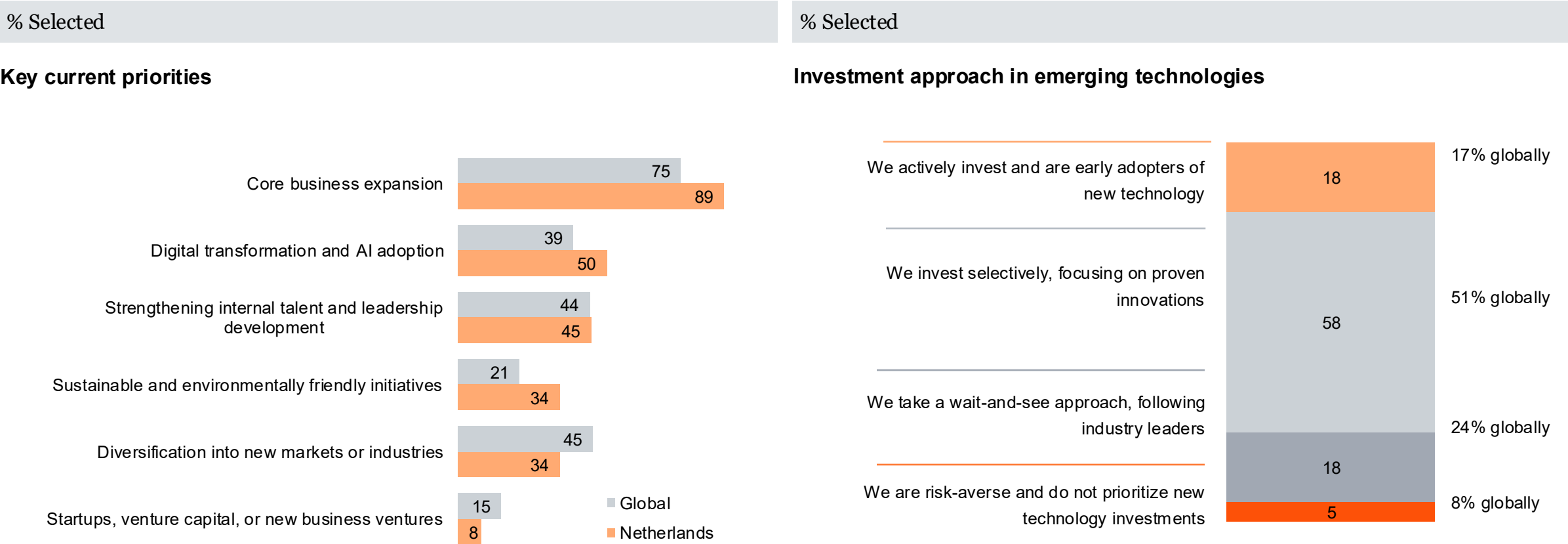


Q37. Do you have a family office? Q38. What type of family office do you have?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38). Base: those that have a family office (2025: n=439), Netherlands respondents that have a family office (n=18)



Core Business Expansion and Digital Transformation are Top Investment Priorities; most prefer Proven Innovations



Q40. Where is your family business currently prioritizing investment for long-term growth? Q41. How does your family business approach investment in emerging technologies (e.g., AI, automation)?

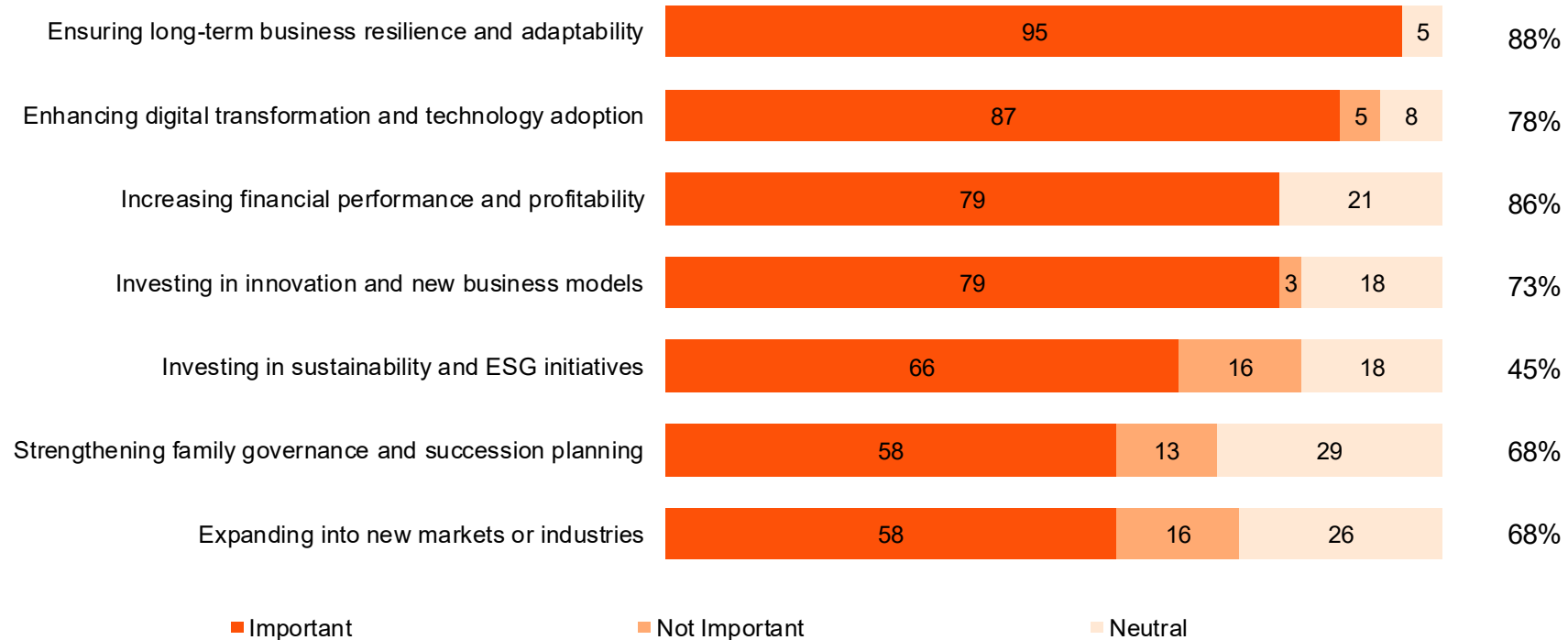
Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)

Ensuring Resilience, Digital Transformation and Innovation are the Most Important Five-Year Priorities

% Selected 'Important' (4-5/5) / % Selected 'Not Important' (1-2/5)

Key priorities over the next five years

(Global: % 'Important')



Q42. Over the next five years, how important do you believe the following will be for your family business?

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Dutch Boards are Small, Family-Dominated and Often Lack Age, Gender and Industry Diversity

4.2

**Average number of people
on the Board of Directors**

The global average is 5.0

61%

Have no women on the board

While a further 26% have just one woman on the board (vs. 35% globally).

32% globally

13%

Have only family members on the board

33% globally

76%

Have no one aged under 40 on the board

59% globally

24%

Have no one from a different industry background on the board

29% globally

Q43. How many people are there on the company's board of directors? Q44. And how many people on the company's board of directors

Base: all Global respondents (2025: n=1,325), Netherlands respondents (n=38)



Thank you