2026 Consumer Sentiment Survey

UK

JUNE 2026

BCG Consumer Sentiment Survey April 2026

11

Countries surveyed: UK, Germany, France, Italy, Spain, Denmark, Sweden, Finland, Norway, Romania, and Poland

~1,800

Respondents per country with a nationally representative sample

12

Product categories surveyed for spending and purchasing behavior

SUMMARY OF RESULTS

Consumer Sentiment in the UK 2026

Pessimism is rising among UK consumers. Concerns about geopolitical and economic conditions continue to rise vs. 2024/2025, exceeding the European average when it comes to inflation and energy prices

Cost pressures persist, with consumers anticipating sustained increases in prices, driving higher expected basic and discretionary spending while income remains stable for most

Consumers keep prioritizing essentials, particularly groceries and pet and home care, while discretionary categories continue seeing reduced volumes and increased deal-seeking

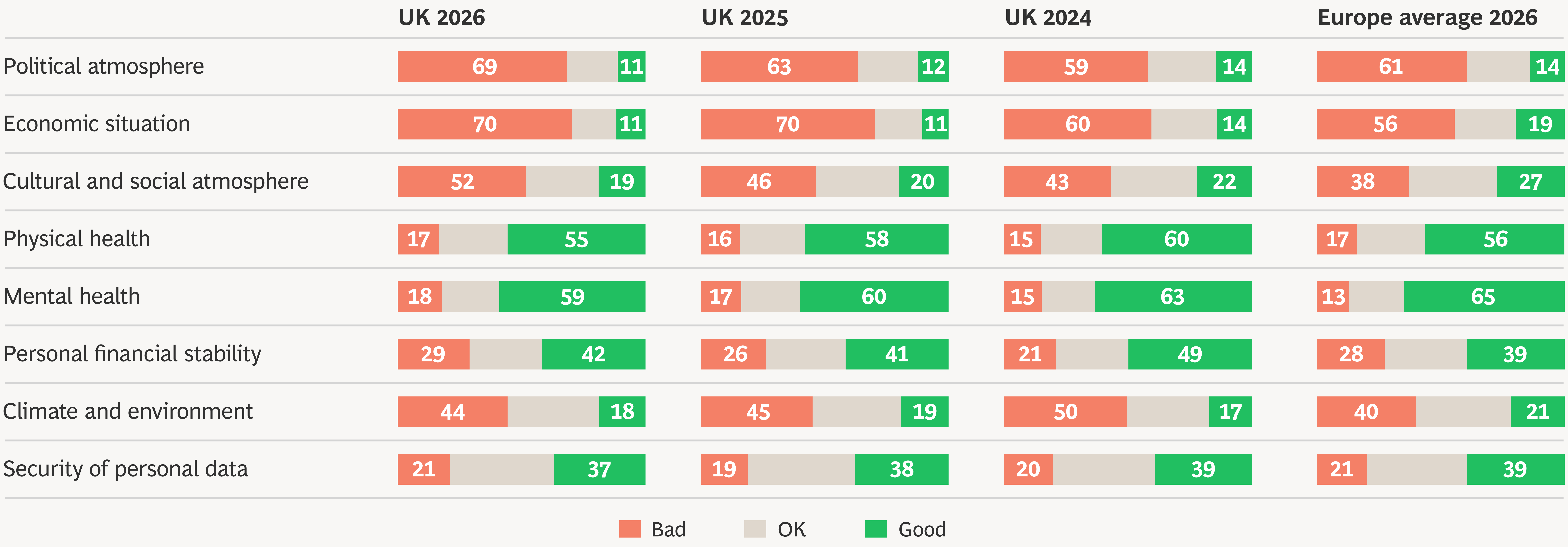
Price sensitivity plays a major role in UK consumer behavior, as discounts drive up to 72% of purchasing decisions. Moreover, at least half of consumers say they are willing to switch brands for better deals. Notably, pet care stands out as the category with the lowest willingness to switch, at just 40%

Online channels are playing a larger role in UK vs. other European countries. UK shows the highest online purchase share, especially in categories such as home appliances, toys, and groceries

Compared to 2025, consumer consideration for sustainability has remained stable, with the share of consumers willing to pay a green premium stayed at around 17%

Consumers continue to feel concerned about the UK's economic situation and political and social atmosphere

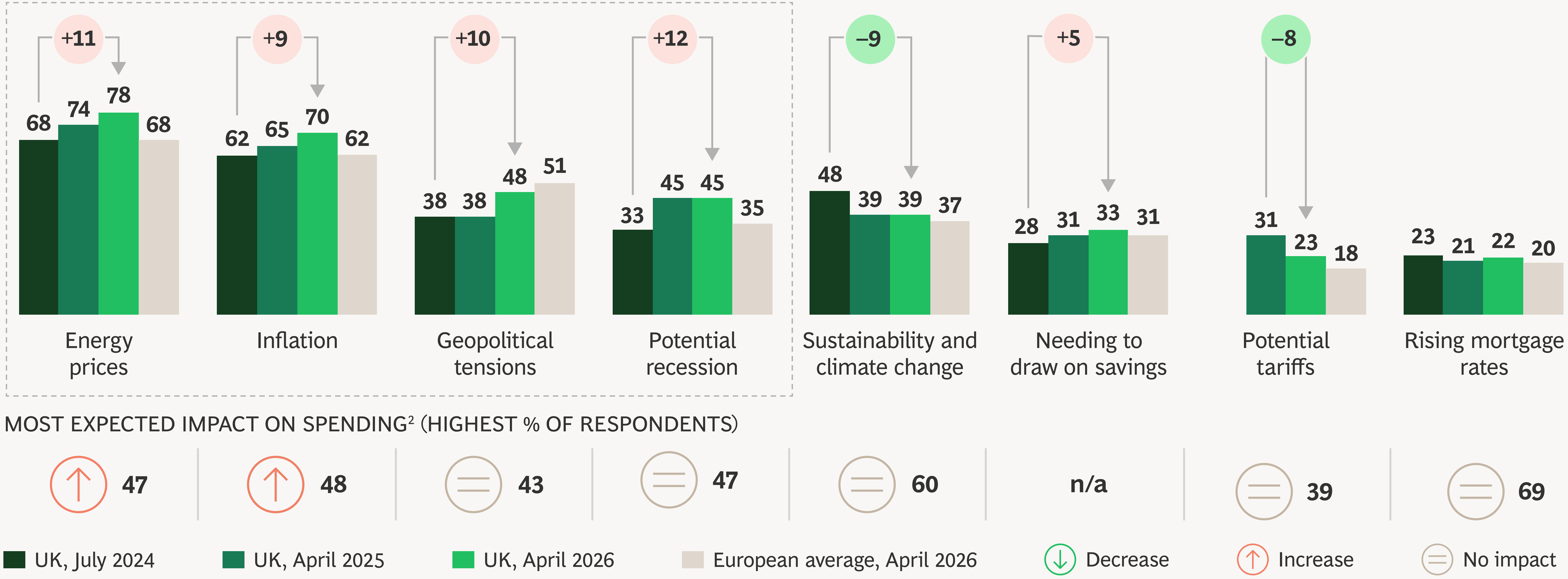
HOW CONSUMERS FEEL ABOUT NATIONAL ISSUES AND THEIR OWN CIRCUMSTANCES (%)



Sources: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries (~1,800 responses per country); 2025 BCG European Consumer Sentiment Survey; 2024 BCG European Consumer Sentiment Survey.
Question 01: *How do you currently feel about each of the following? (Response options: Very bad, Bad, Neither good nor bad, Good, Very good. Results shown as Bad, OK, and Good.)*

Concern about energy prices, inflation, and geopolitical tensions continues to rise

KEY AREAS OF CONCERN[1] (% OF RESPONDENTS)

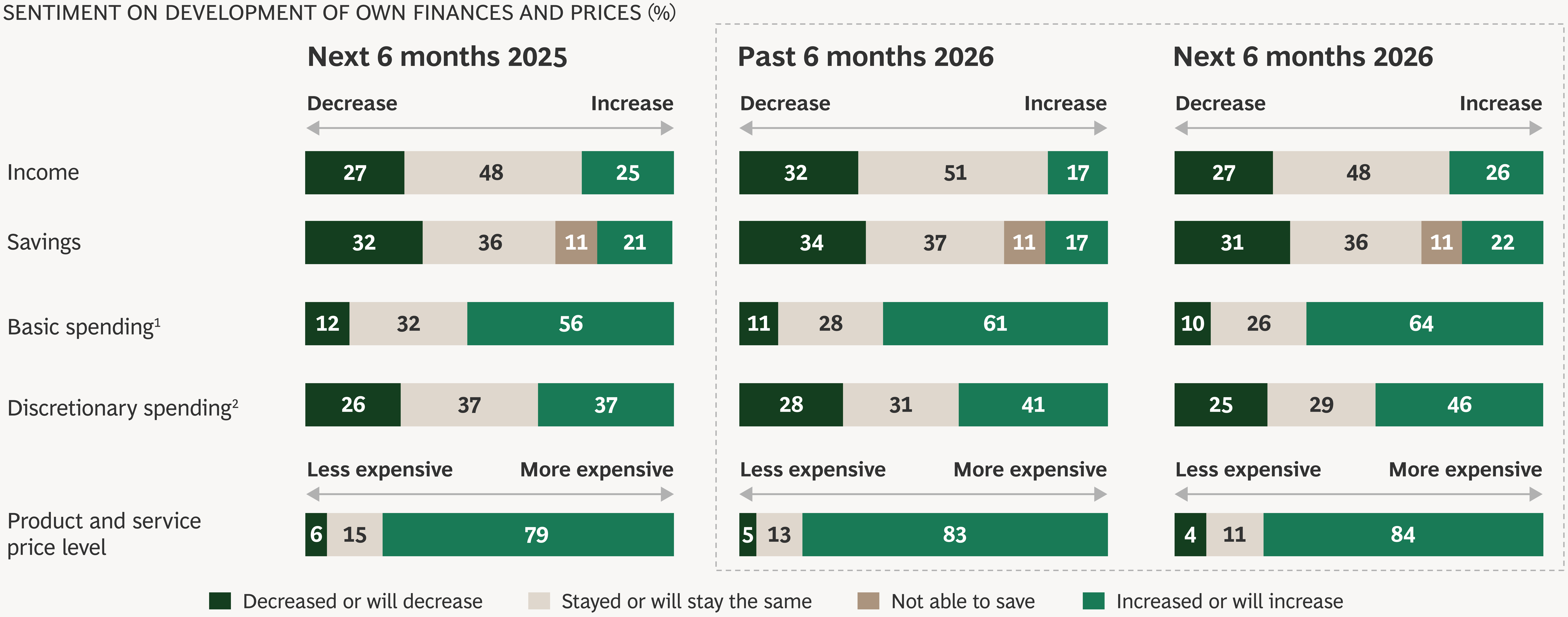


Sources: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries (~1,800 responses per country); 2025 BCG European Consumer Sentiment Survey; 2024 BCG European Consumer Sentiment Survey.

[1]Question O2: *Which of the following are you currently personally concerned by? Select all that apply. (Multiple selection. Bars show those who selected "yes.")*

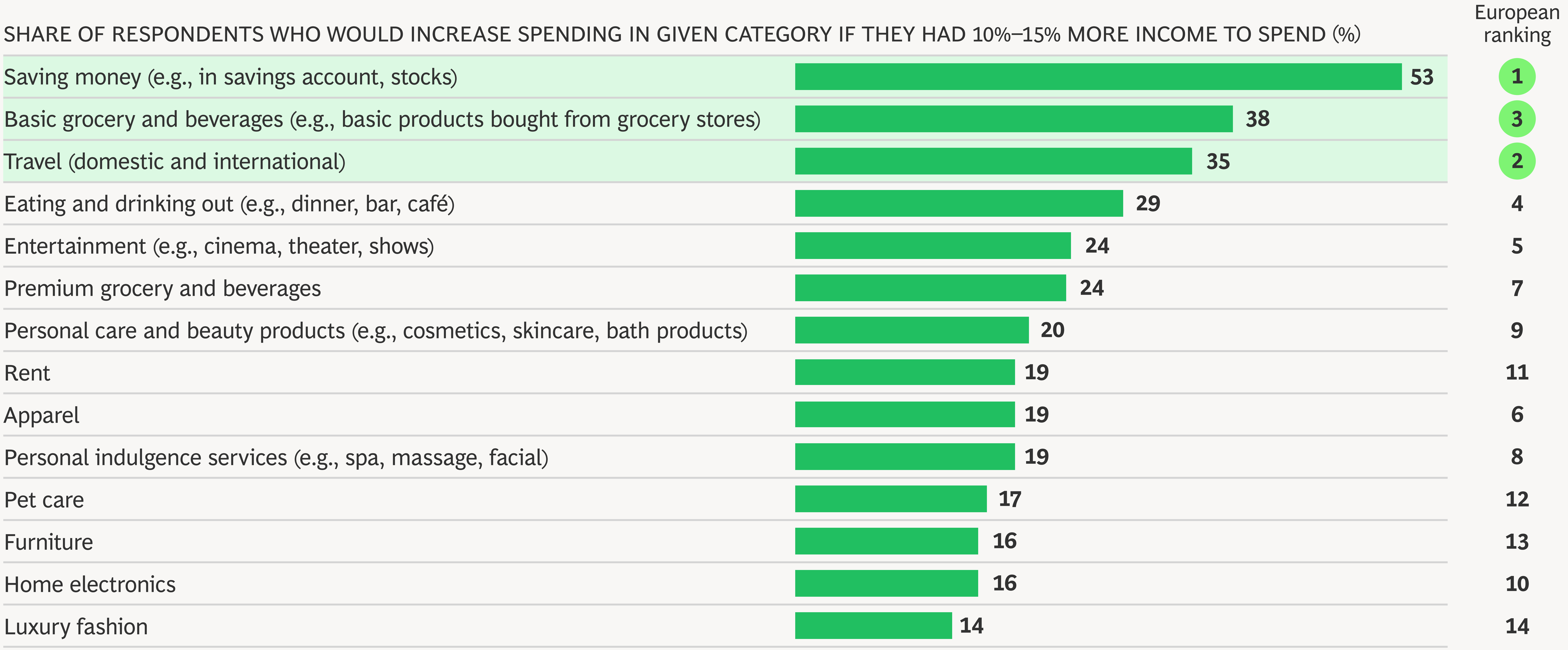
[2]Question O3a: *How do you expect the development of the following factors to impact your spending in the next 6 months? (Response options: Increase, Decrease, No impact.)*

UK consumers anticipate further increases in spending, driven by higher prices



Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.
Questions O4–10, O12–13: *Which of these statements best describe your [income/savings/spending/sentiment on pricing] compared to 6 months ago/in the next 6 months?*
[1]e.g., housing, transport, medication, education, basic food. [2]e.g., clothing, dining out, concerts, entertainment.

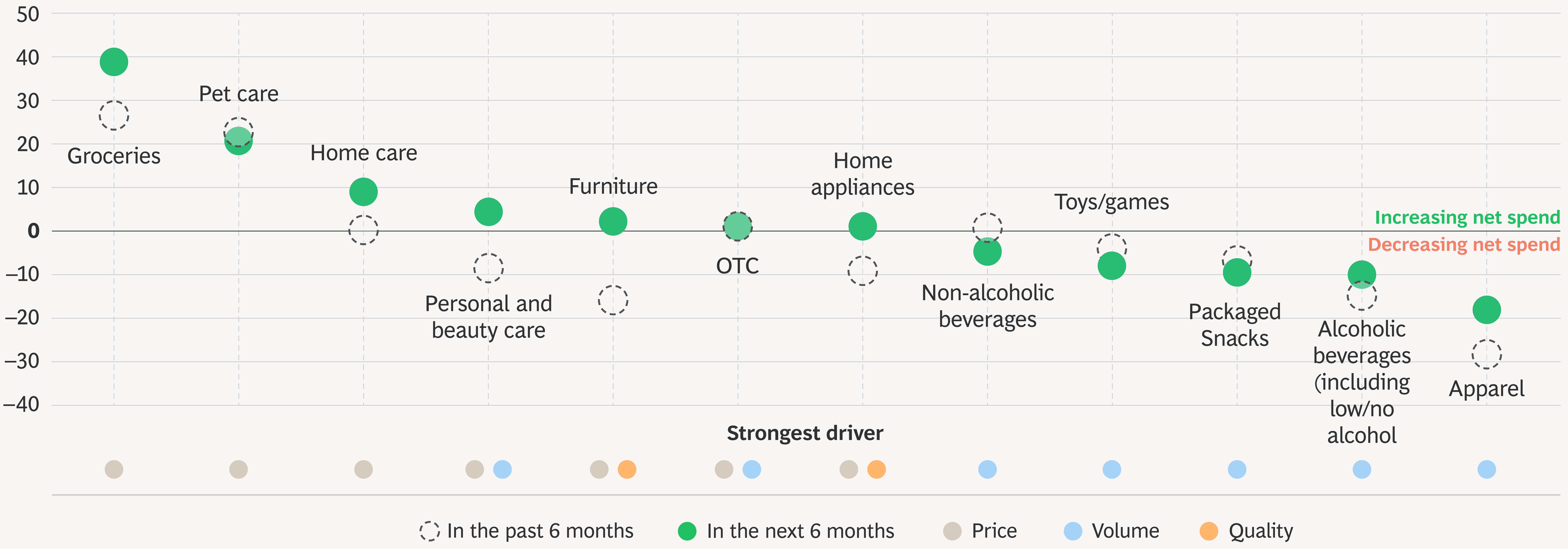
Over half of UK consumers would allocate a 10%–15% increase in income to savings rather than spending



Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.
Question O16: *If you had 10%–15% more income to spend than what you have today, how would you change your spending behavior in the following categories? [Multiple selection; Response options: Reduce or cut, Keep the same, Increase, Start. Results shown for Increase or Start.)*

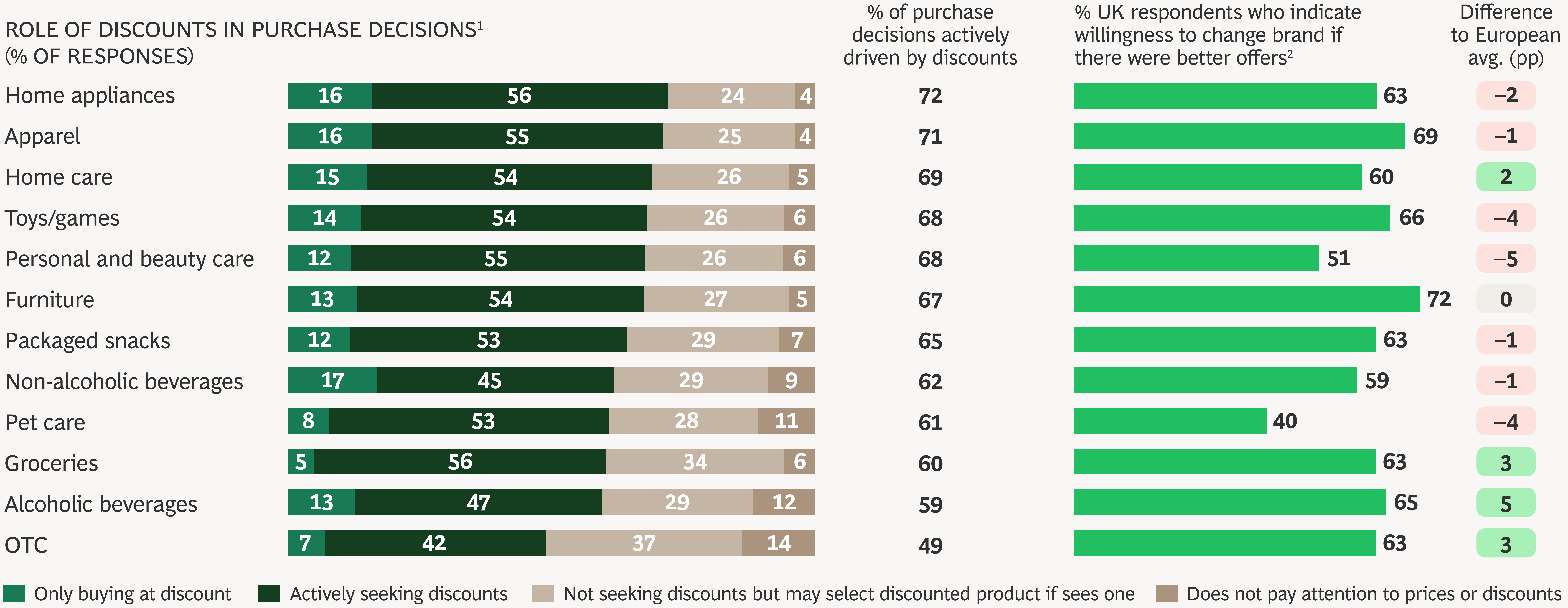
UK consumers continue prioritizing essentials; spending increases are linked to price rises and decreases are linked to deal-seeking and decreased volume

NET SPENDING CHANGE AMONG CONSUMERS WITHIN CATEGORY (PP)



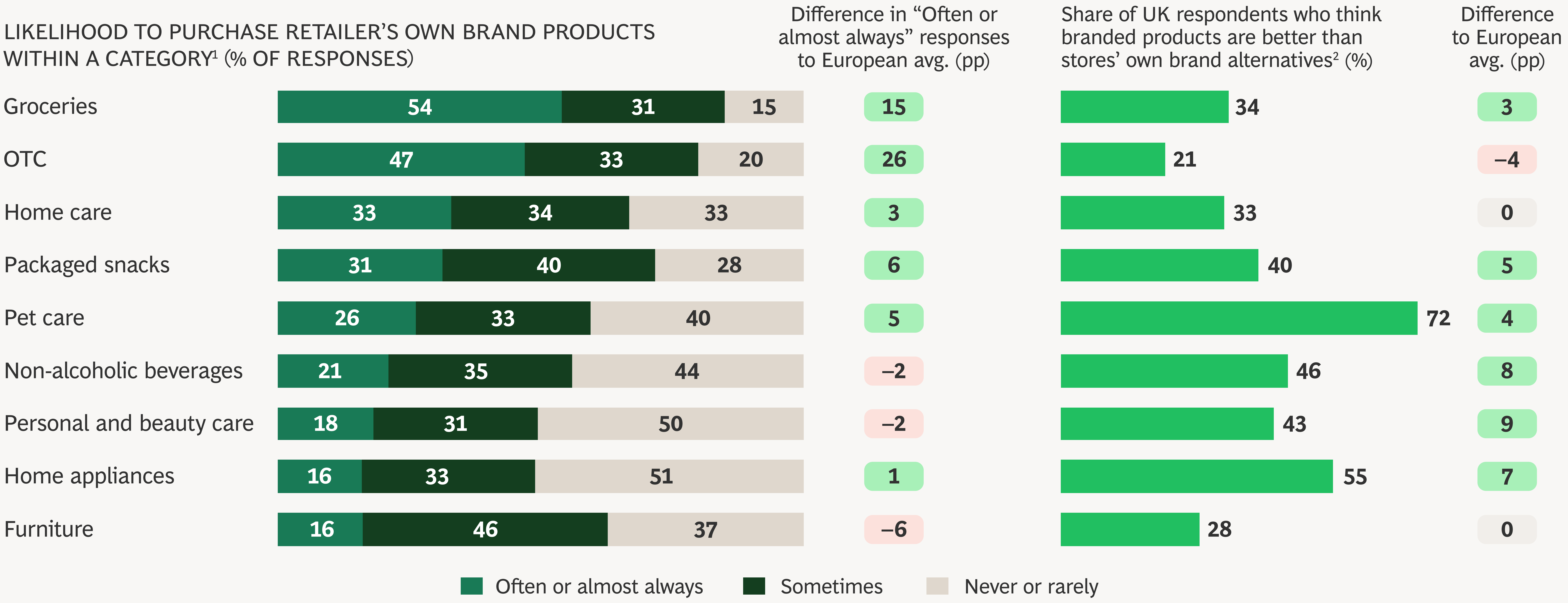
Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.
Note: Net spending is the percentage difference between the share of respondents indicating increased spending and those indicating decreased spending within a category. OTC = Over-the-counter drugs and supplements.
Question C2.1: *In the past six months / one year, how much has your total spending changed compared to six months ago / a year ago?"*
Question C3.1: *How much do you expect your total spending to change in the next six months/year compared to today? (Responses: Less, Neutral, More, Will not buy.)*

Impact of discounts varies significantly: over 70% of purchase decisions are driven by discounts in appliances and apparel, versus less than 50% in OTC



Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.
Note: OTC = Over-the-counter drugs and supplements.
[1]Question C5.4: *Thinking about [category], how would you describe your behavior regarding discounts within [category]?* [2]Question C5.3: *To what extent do you agree with the following statement: "I rarely switch brands for the [category] I buy, even if there were better offers for other brands." (Response options: Agree, Neutral, Disagree.)*

UK consumers are more open to retailers' own brands than other European consumers, especially within groceries and OTC



Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.
Note: OTC = Over-the-counter drugs and supplements.
[1]Question C5.3a: *Thinking about [category], how likely are you to buy unbranded or retailers' own brand items (instead of branded items)?* [2]Question C5.3: *To what extent do you agree with the following statement: "I think branded [category] products are more effective/better in quality and taste than non-branded / stores' own brand alternatives." (Response options: Agree, Neutral, Disagree.)*

Value for money, convenience of purchase, and ease of use are the top drivers in purchasing decisions in most categories

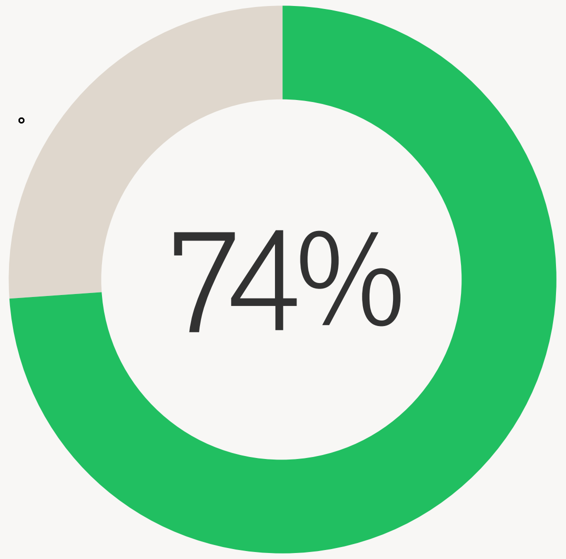
CHARACTERISTICS THAT INFLUENCED A RECENT PURCHASE (%)	Apparel	Personal care	Home care	OTCs	Snacks	Groceries	Alcohol	Beverages	Toys and games	Pet care	Home appliances	Furniture
Good value for money	73	75	77	70	69	75	65	62	66	66	73	67
Trusted brand	49	64	53	54	51	51	50	53	48	62	54	45
Convenience of purchase	51	52	60	59	51	51	48	52	53	59	56	47
Functionality	50	50	54	56	45	42	59	52	54	59	56	52
Practical/ease of use	70	62	66	67	41	29	26	33	57	53	65	58
Low price	48	53	60	51	53	59	51	48	50	47	50	43
Availability	44	52	52	56	38	41	47	44	51	53	57	42
Health	24	37	28	44	29	41	20	28	39	69	37	41
Good customer service	44	36	31	29	19	36	23	27	44	41	48	44
Attractive design	64	19	19	10	16	16	19	18	51	25	45	64
Recommendation	25	27	22	30	23	20	23	24	45	37	41	32
Sustainability	24	28	28	28	22	24	23	23	34	35	42	25
Local production	17	20	15	15	22	20	21	19	24	26	27	19

Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.
Note: KPC = Key purchasing criteria; OTCs = Over-the-counter drugs and supplements.
Question C5.1: *Thinking about your most recent purchase of [category], how important were each of the following in influencing your choice? (Share of responses for "Very important.")*

Top 3 KPCs
Bottom 3 KPCs

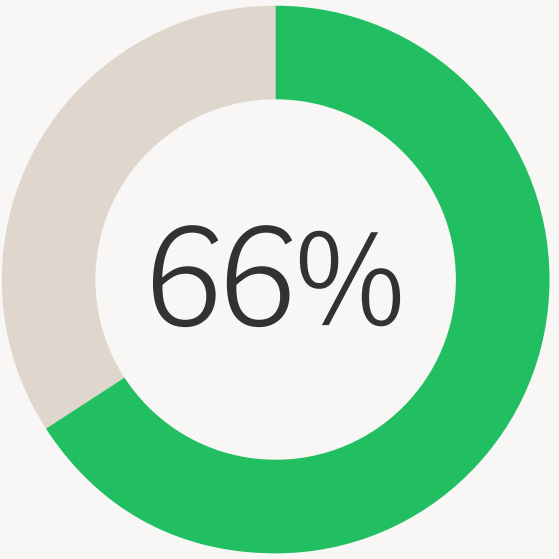
A few consumer attitudes stand out across categories

Toys and games



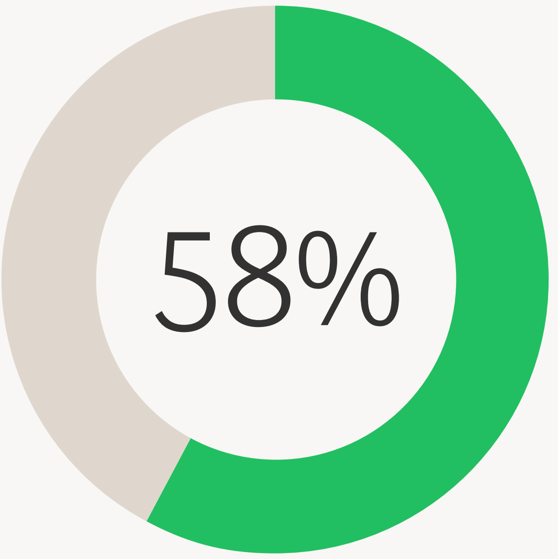
of consumers say that they think **“Screen-free learning and play is critical for children”**

Groceries



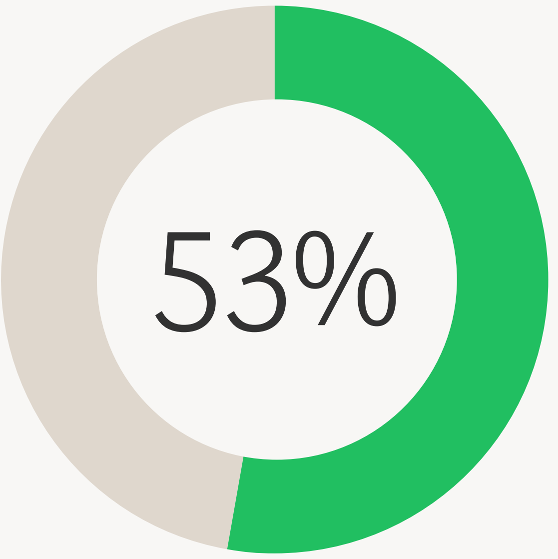
of consumers agree with the statement **“I prefer to buy fresh items and prepare a meal by myself”**

Beverages



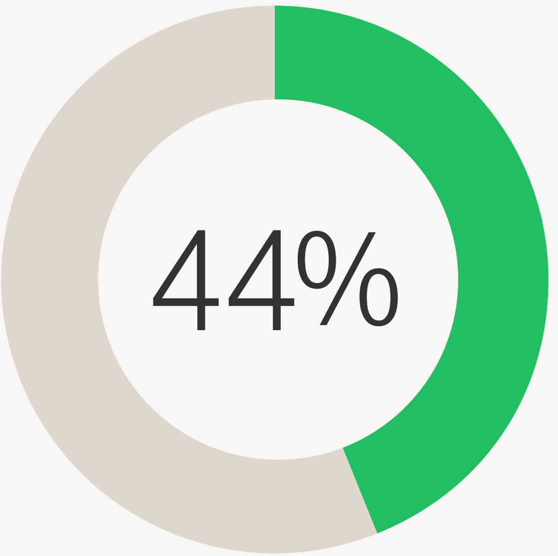
of beverage consumers say they **“look for beverages that are low in sugar or calories”**

Apparel



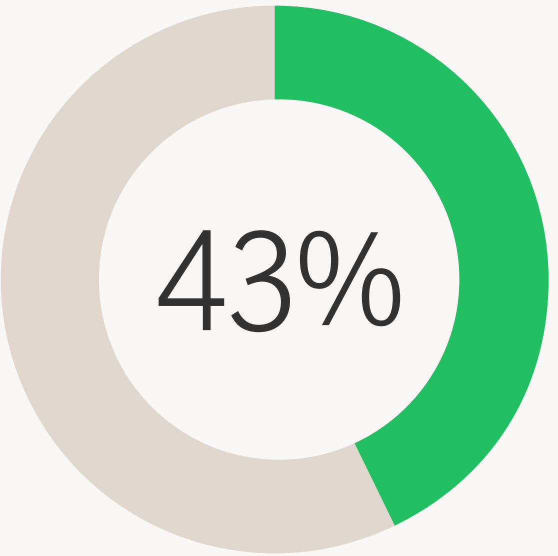
of fashion-buyers say that they are **“moving away from fast fashion, buying fewer items that last longer”**

Personal care



of customers say that they **focus on key ingredients when purchasing skincare items**

Alcohol



of alcohol buyers say that they **have reduced or plan to reduce their alcohol consumption**

Source: 2026 BCG European Consumer Sentiment (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.
Question C5.3: *Please indicate to what extent you agree with each of the following statements in relation to [assigned category]. (Multiple selection; Response options: Strongly disagree, Somewhat disagree, Neither disagree or agree, Somewhat agree, Strongly agree. Results shown for Somewhat agree and Strongly agree).*

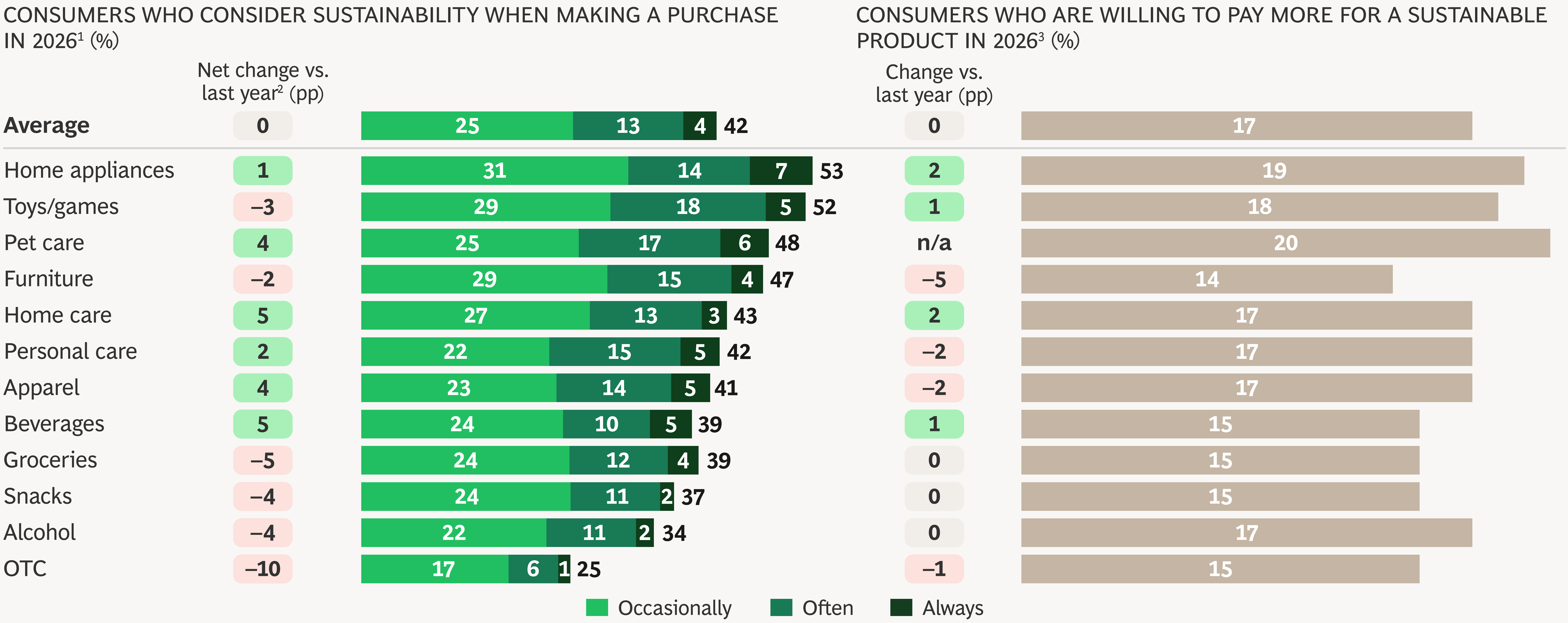
UK consumers are using online channels for purchasing much more than Europeans on average, especially for home appliances and groceries

Online more important for purchasing ← → **Online less important for purchasing**

	Home appliances	Toys and games	Apparel	Furniture	Pet care	Personal care	Groceries	Home care	Beverages	OTCs	Alcohol	Snacks
CONSUMERS WHO USE ONLINE AS THE MAIN SOURCE OF INSPIRATION[1] (%)	42	39	36	36	25	25	18	20	13	18	12	13
Difference to European avg. (pp)	5	2	2	4	1	–1	6	5	3	–8	–1	3
CONSUMERS WHO USE ONLINE AS THE MAIN SOURCE OF PURCHASE[2] (%)	34	32	28	23	21	18	17	13	12	11	9	9
Difference to European avg. (pp)	14	10	7	7	5	3	11	6	7	–5	3	4

Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.
Note: OTC= Over-the-counter drugs and supplements.
[1]Question C4.1: *Thinking about when you're deciding to purchase [category], how would you typically browse, research, or look for inspiration on what to buy? (Response options: Mostly online, Mixed, Mostly offline.)* [2]Question C4.3: *Thinking about when it comes to making a purchase of [category], what proportion of your spending is made online/digitally today (instead of buying products from physical stores)? (Response options: Mostly online, Mixed, Mostly offline.)*

Share of UK consumers considering sustainability when purchasing has been stable at 42% since 2025, but only 17% are willing to pay a green premium



Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.
Note: OTCs = Over-the-counter drugs and supplements.
[1]Question C6.1: *Being completely honest, how often do you think about sustainability when you make decisions regarding the purchase of [category]?* [2]Question C6.2a: *How have your sustainability considerations when purchasing [category] changed over the past year?* [3]Question C6.2: *How much less or more would you be willing to pay in [category] products for sustainable alternatives that minimize your climate impact (vs non-sustainable alternatives)?*

Please contact your local MDP team for more information

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