



2026 Consumer Sentiment Survey

Italy

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 Italy 2026



Pessimism is rising. Italian consumers remain concerned about the political atmosphere and economic situation, in line with other European countries, such as France, Spain, Sweden, and the UK



Italy's consumers are increasing their spending on household essentials such as groceries and home care, primarily driven by price inflation. Spending also remains high among pet owners. At the same time, consumers are cutting back in other categories by reducing volume or actively seeking deals



Price sensitivity strongly influences Italian consumer behavior, with up to 78% of purchase decisions driven by discounts. Additionally, 47%–74% of consumers report a willingness to switch brands for better offers



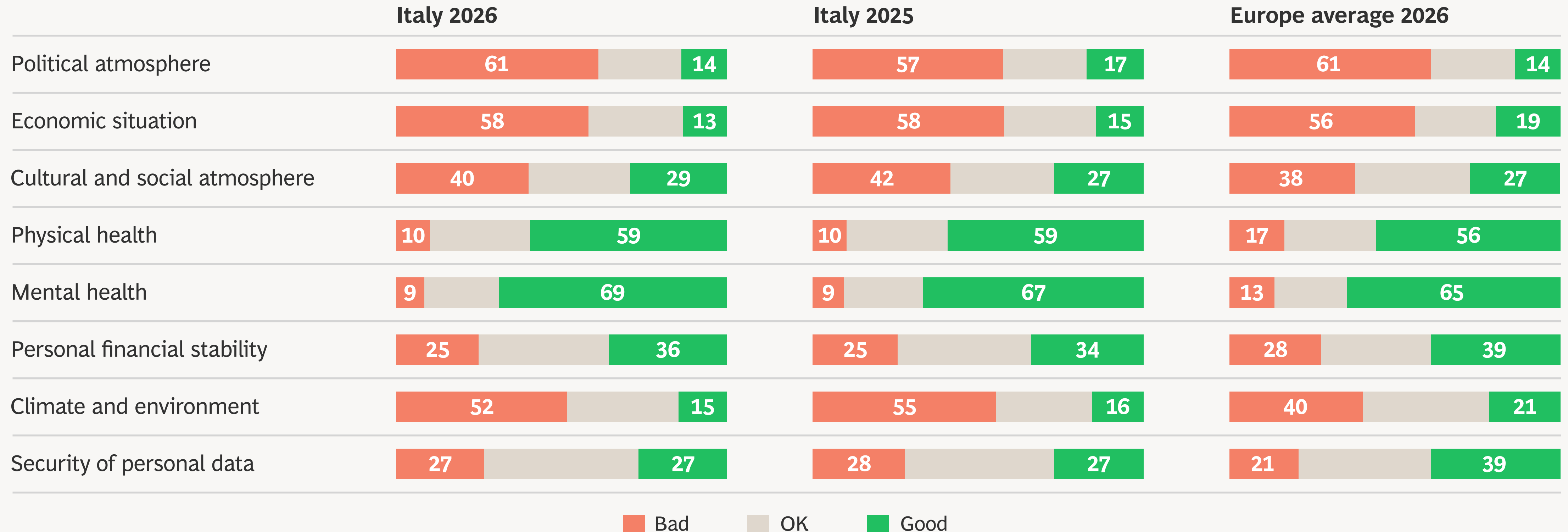
Italy shows one of the lowest levels of online adoption among the countries surveyed, particularly in high-frequency categories such as snacks, beverages, and alcohol



Compared to 2025, consumer consideration for sustainability has increased. **However, the share of consumers willing to pay a premium for sustainable products remains low**

Italians remain as pessimistic as in 2025 on the macro situation, less financially polarized but more negative on climate and data vs. Europe

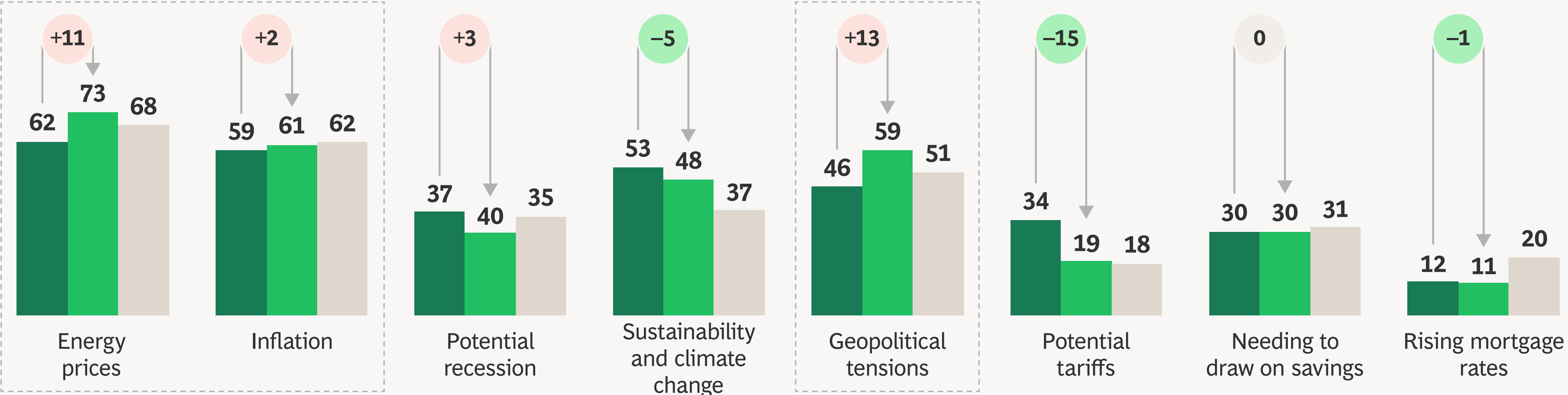
HOW CONSUMERS FEEL ABOUT NATIONAL ISSUES AND THEIR OWN CIRCUMSTANCES (%)



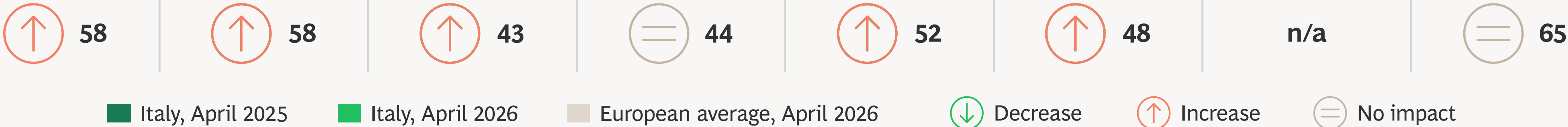
Sources: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries (~1,800 responses per country); 2025 BCG European Consumer Sentiment Survey. Question O1: How do you currently feel about each of the following? (Response options: Very bad, Bad, Neither good nor bad, Good, Very good. Results shown as Bad, OK, and Good.)

Italy's consumers feel impacted by energy prices, inflation, and geopolitical tensions, with an expectation they will translate to higher spending

KEY AREAS OF CONCERN¹ (% OF RESPONDENTS)



MOST EXPECTED IMPACT ON SPENDING² (HIGHEST % OF RESPONDENTS)

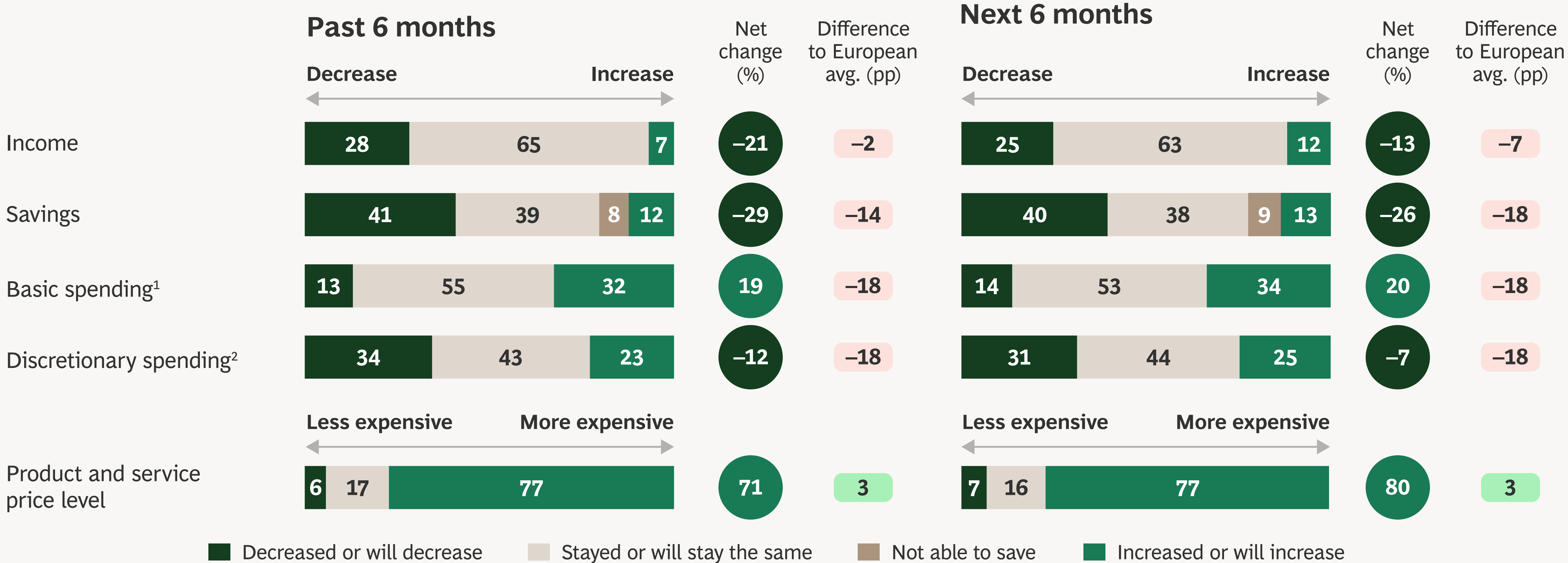


■ Italy, April 2025
 ■ Italy, April 2026
 ■ European average, April 2026
 ↓ Decrease
 ↑ Increase
 = No impact

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.
¹Question O2: Which of the following are you currently personally concerned by? Select all that apply. (Multiple selection. Bars show those who selected "yes.") ²Question 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.)

Italy's respondents anticipate prices to increase and net income, discretionary spending, and savings to experience a sustained decrease

SENTIMENT ON DEVELOPMENT OF OWN FINANCES AND 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? ¹e.g., housing, transport, medication, education, basic food. ²e.g., clothing, dining out, concerts, entertainment.

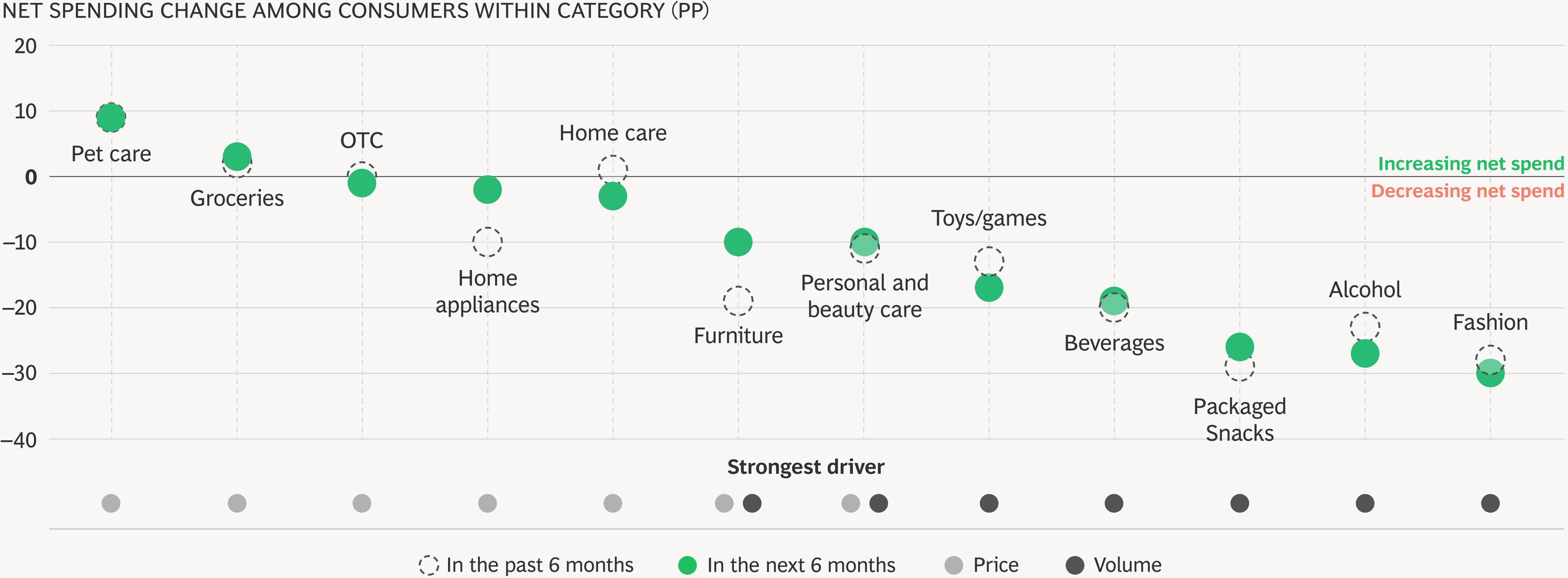
Savings are prioritized over consumption: 40% of Italy's respondents would allocate at least a part of a 10%–15% income boost to savings



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

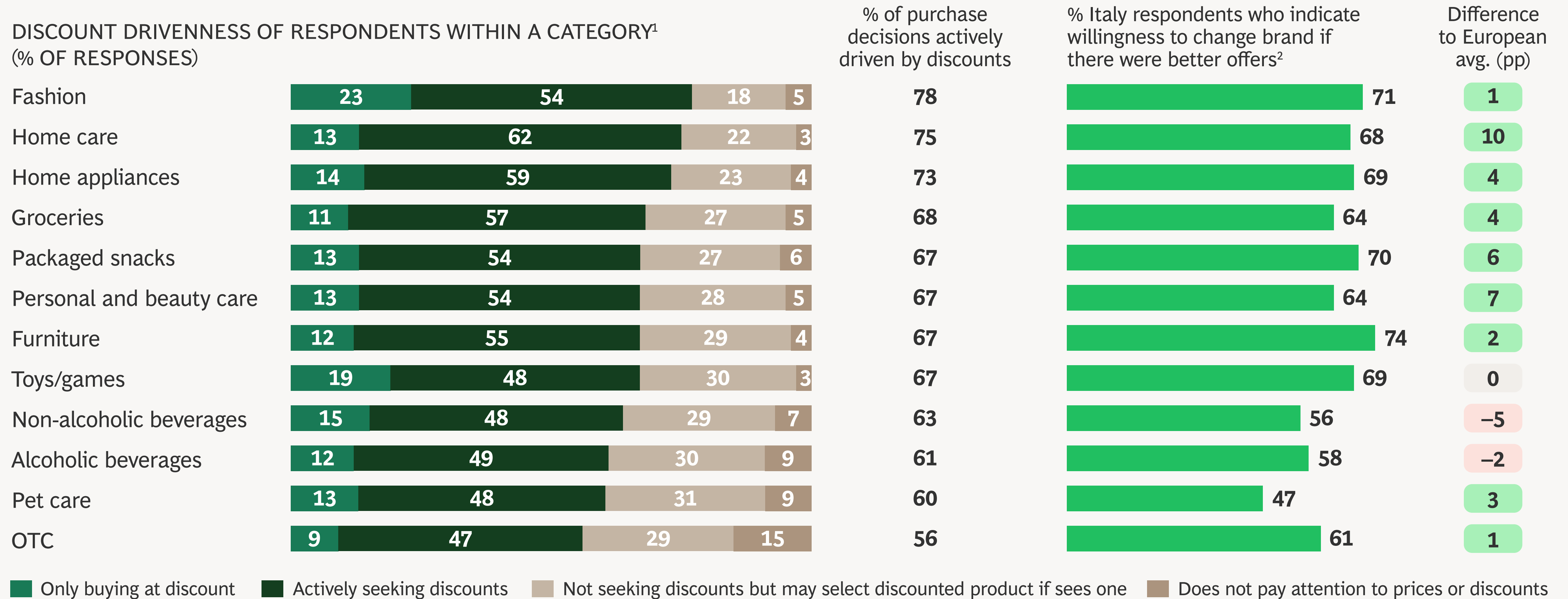
Question O16: If you had 10%–15% more income to spend than what you have today, how would you change your spending behavior in the following categories? [Multiple selection; Response options: Reduce or cut, Keep the same, Increase, Start. Results shown for Increase or Start.]

Groceries and pet care are the only categories with expected spend increase; consumers cutting spending elsewhere by deal-seeking and volume cutting



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.)*

Up to 78% of Italian consumers' purchase decisions are driven by discounts, and 47%–74% indicate willingness to switch brands for better offers

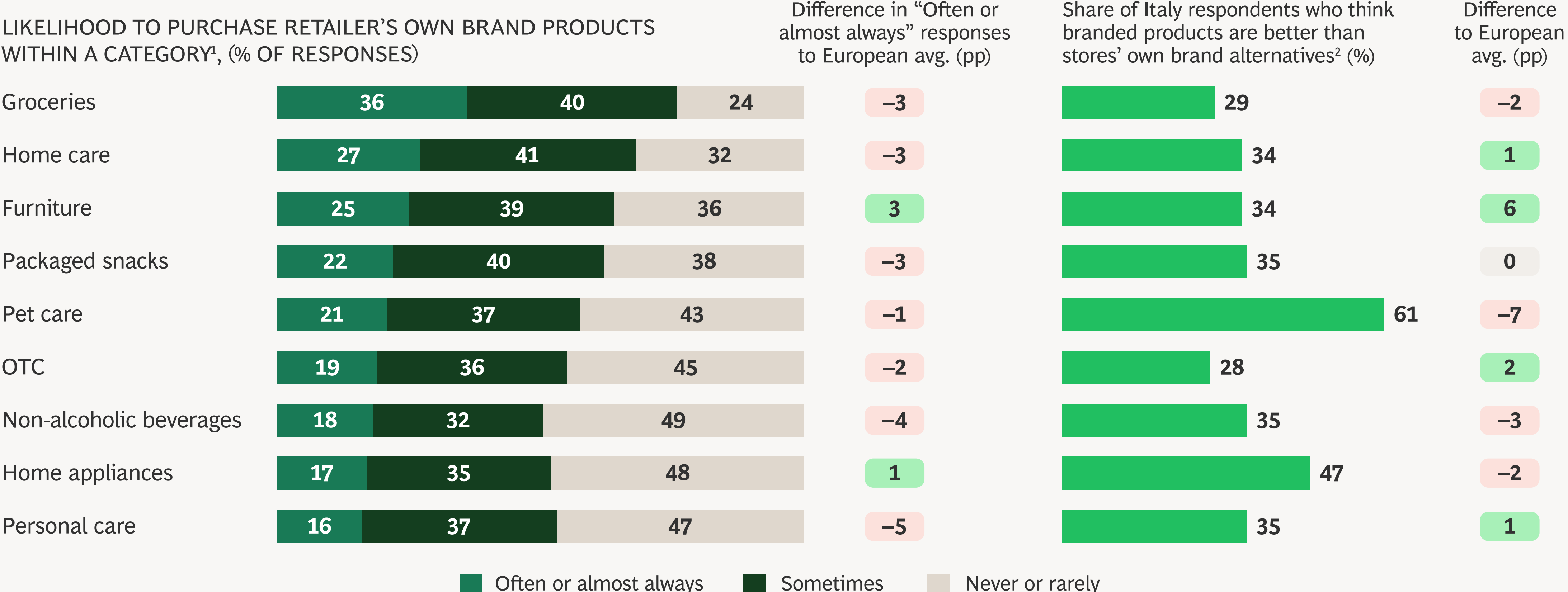


Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.

Note: OTC = Over-the-counter drugs and supplements.

¹Question C5.4: Thinking about [category], how would you describe your behavior regarding discounts within [category]? ²Question 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.)

Italian consumers are less open to retailers' brands compared to Europeans on average, especially within personal care and beverages

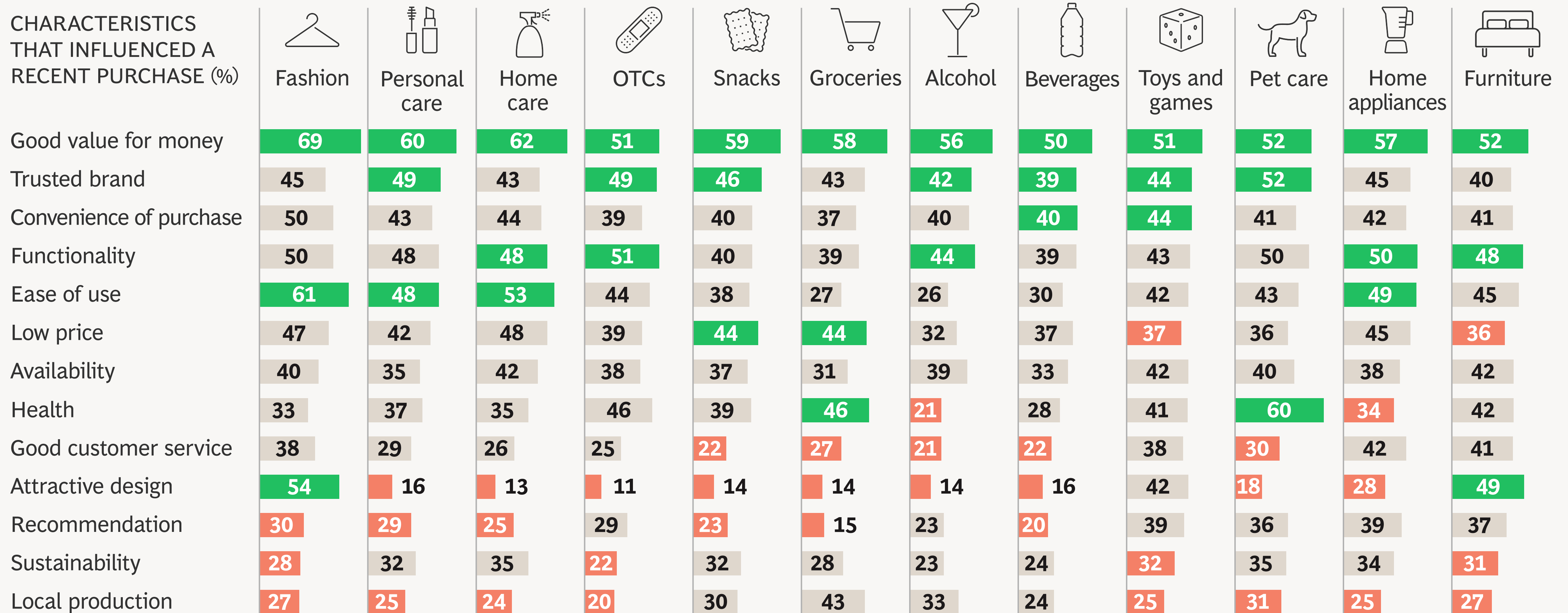


Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.

Note: OTC = Over-the-counter drugs and supplements.

¹Question C5.3a: Thinking about [category], how likely are you to buy unbranded or retailers' own brand items (instead of branded items)? ²Question 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, trusted brand, and ease of use are the top drivers in purchasing decisions in most categories



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

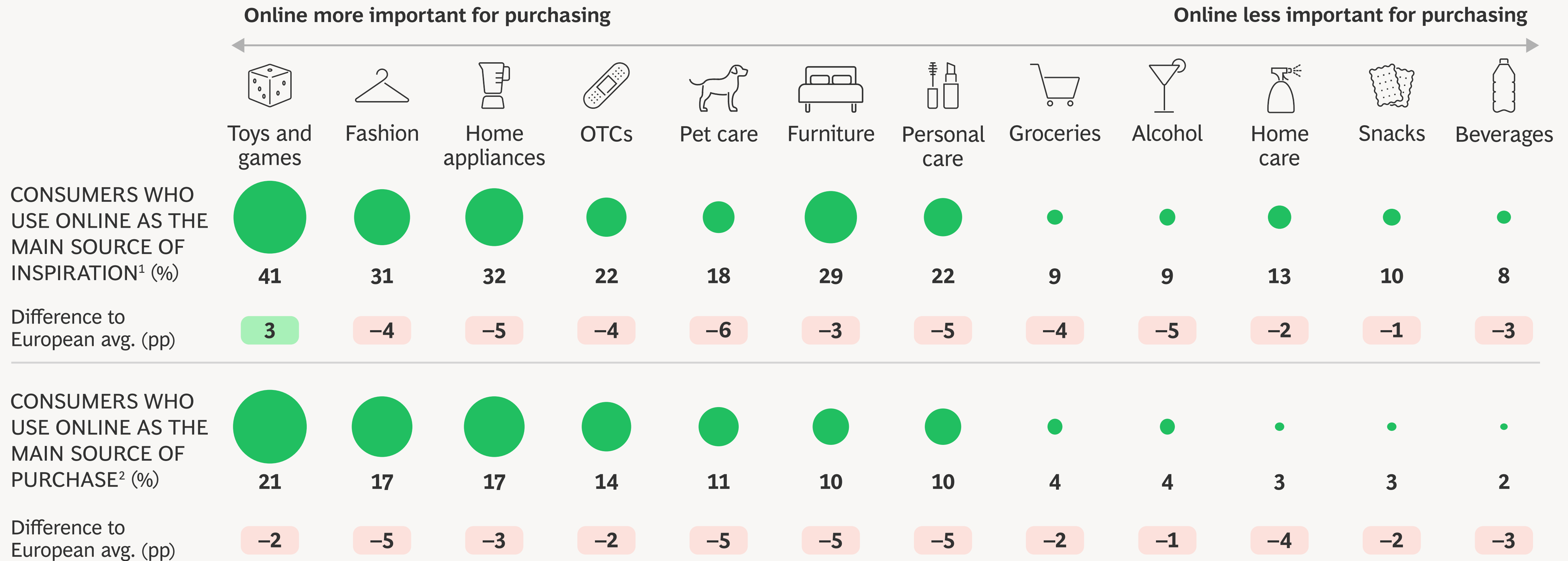
Note: KPC = Key purchasing criteria; OTCs = Over-the-counter drugs and supplements.

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

Italy's consumers are using online channels for purchasing much less than Europeans across all categories



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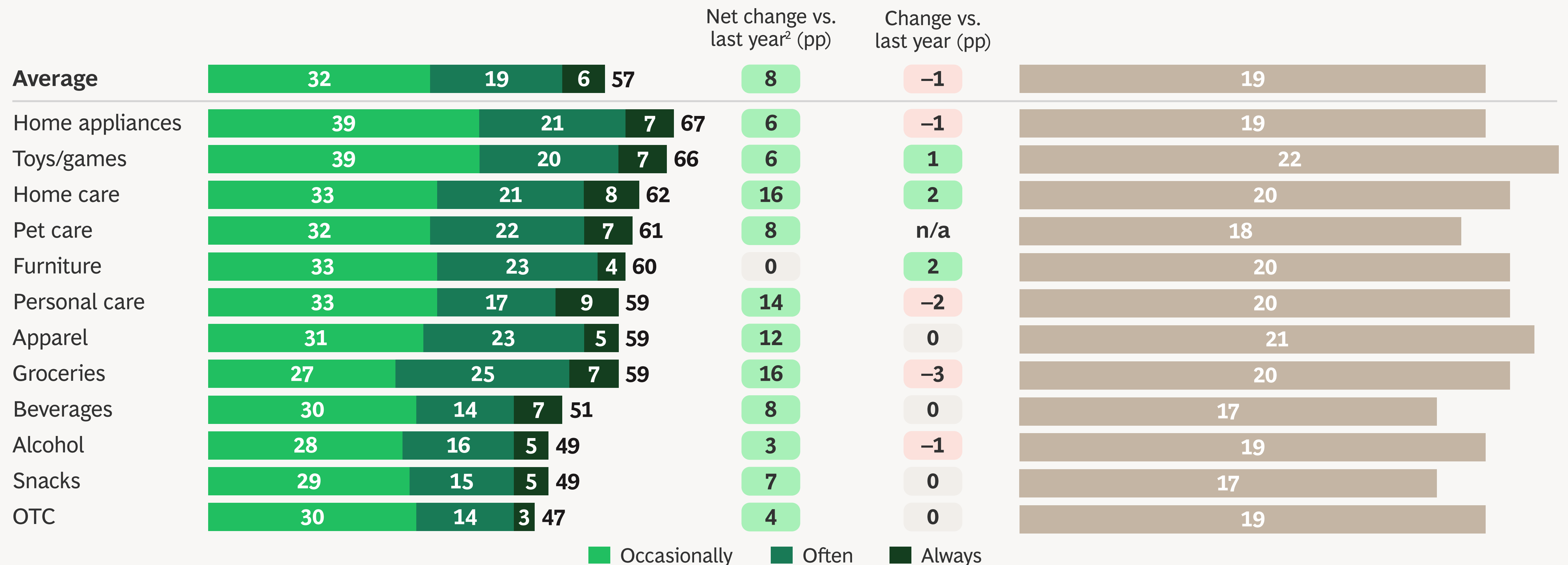
Note: OTC= Over-the-counter drugs and supplements.

¹Question 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.) ²Question 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 Italian consumers considering sustainability when purchasing increases, yet those willing to pay a premium remains stable

CONSUMERS WHO CONSIDER SUSTAINABILITY WHEN MAKING A PURCHASE IN 2026¹ (%)

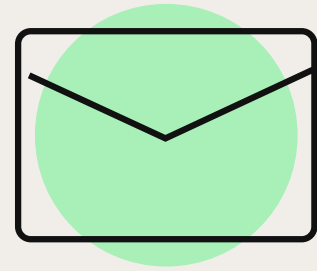
CONSUMERS WHO ARE WILLING TO PAY MORE FOR A SUSTAINABLE PRODUCT IN 2026³ (%)



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.

¹Question C6.1: Being completely honest, how often do you think about sustainability when you make decisions regarding the purchase of [category]? ²Question C6.2a: How have your sustainability considerations when purchasing [category] changed over the past year? ³Question 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 for
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