



# 2026 Consumer Sentiment Survey

**Poland**

**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 Poland 2026



**Cautious optimism.** Polish consumers are more optimistic than the average European consumer on both the economic situation and their personal finances. Their main concerns are inflation, energy prices, and geopolitical tensions



**Polish consumers are increasing their spending on household essentials such as groceries, home care, pet care, and OTCs.** However, these increases are driven mainly by inflation rather than an increase in volume or purchasing frequency. Consumers also show willingness to spend more on home appliances and furniture by purchasing better quality items. For other categories, consumers are cutting back by reducing quantity, in particular beverages, with alcohol being most affected



**Price sensitivity strongly influences Polish consumers, with at least 1 in 2 consumers making purchase decisions based on discounts.**

Additionally, more than half of consumers also report a willingness to switch brands for better offers. Pet care is the category where less than 50% are willing to switch brands despite better offers



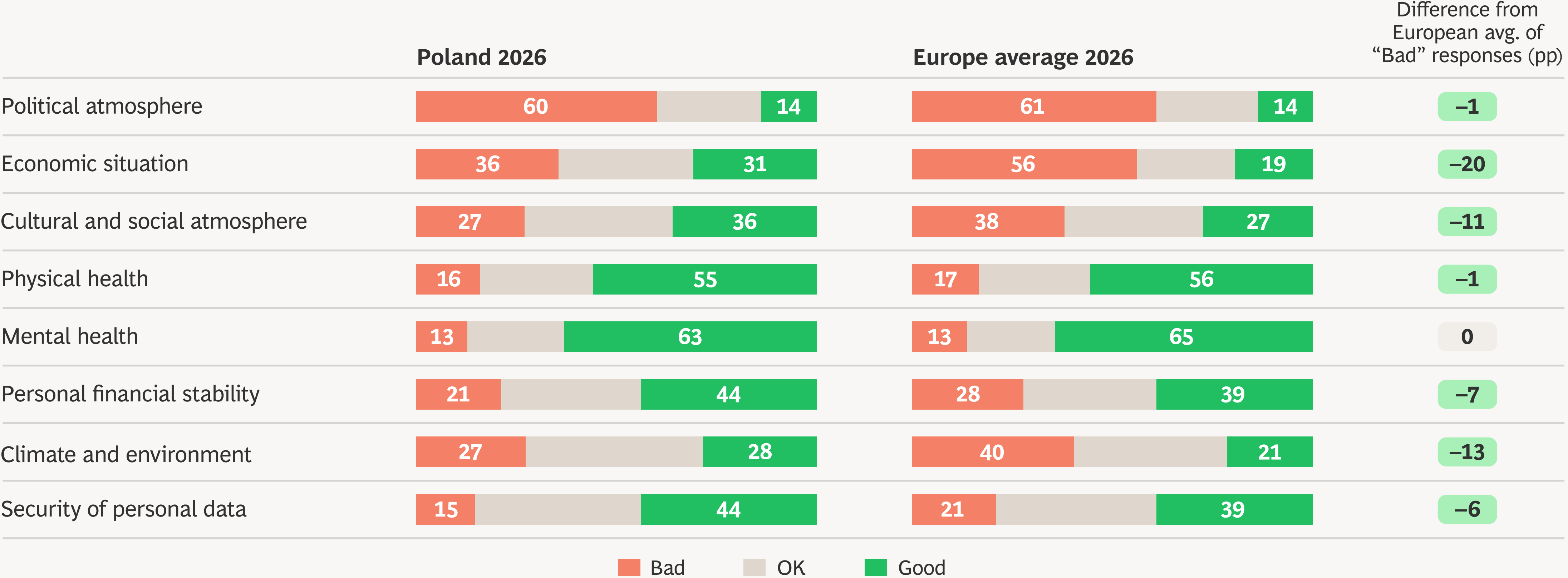
**Online adoption in Poland is mixed,** with the highest levels in toys and pet care, but below European average levels in groceries and beverages, signaling upcoming opportunity



Consumer consideration for sustainability is decreasing, and **consumers' willingness to pay a premium for sustainable products is slightly below the European average**

# Polish consumers are more optimistic than the average European consumer regarding the overall economic situation and their personal finances

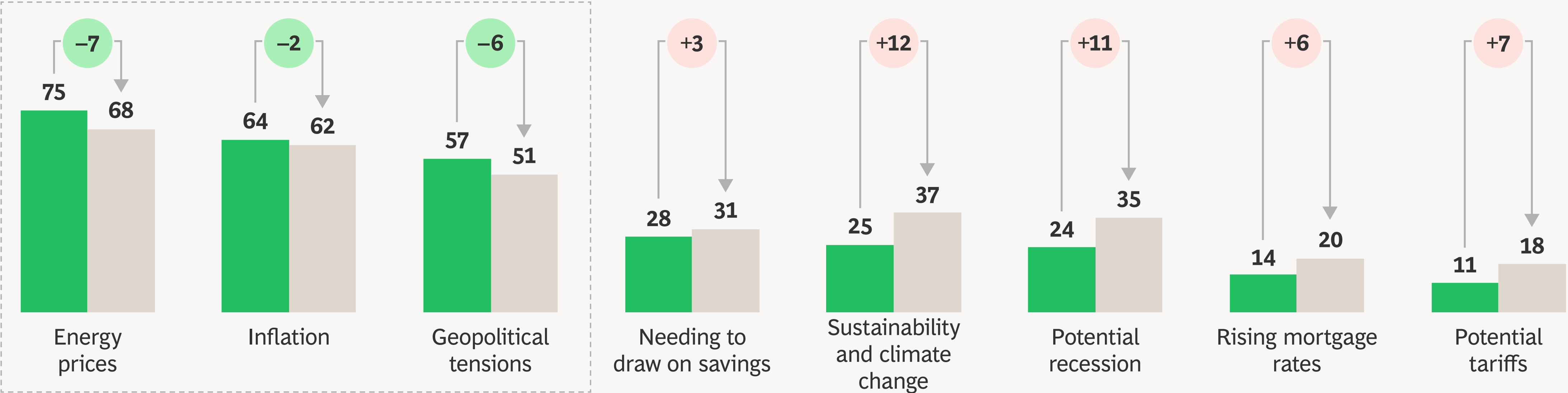
HOW CONSUMERS FEEL ABOUT NATIONAL ISSUES AND THEIR OWN CIRCUMSTANCES (%)



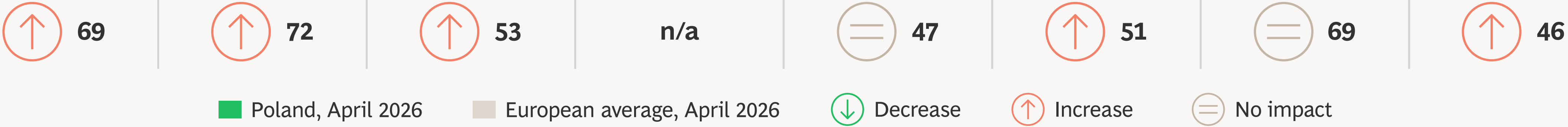
Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.  
 Question O1: How do you currently feel about each of the following? (Response options: Very bad, Bad, Neither good nor bad, Good, Very good. Results shown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

# Poles' concerns skew to energy, inflation, and geopolitical tensions; they are less worried about shrinking savings, sustainability, and recession

KEY AREAS OF CONCERN<sup>1</sup> (% OF RESPONDENTS)



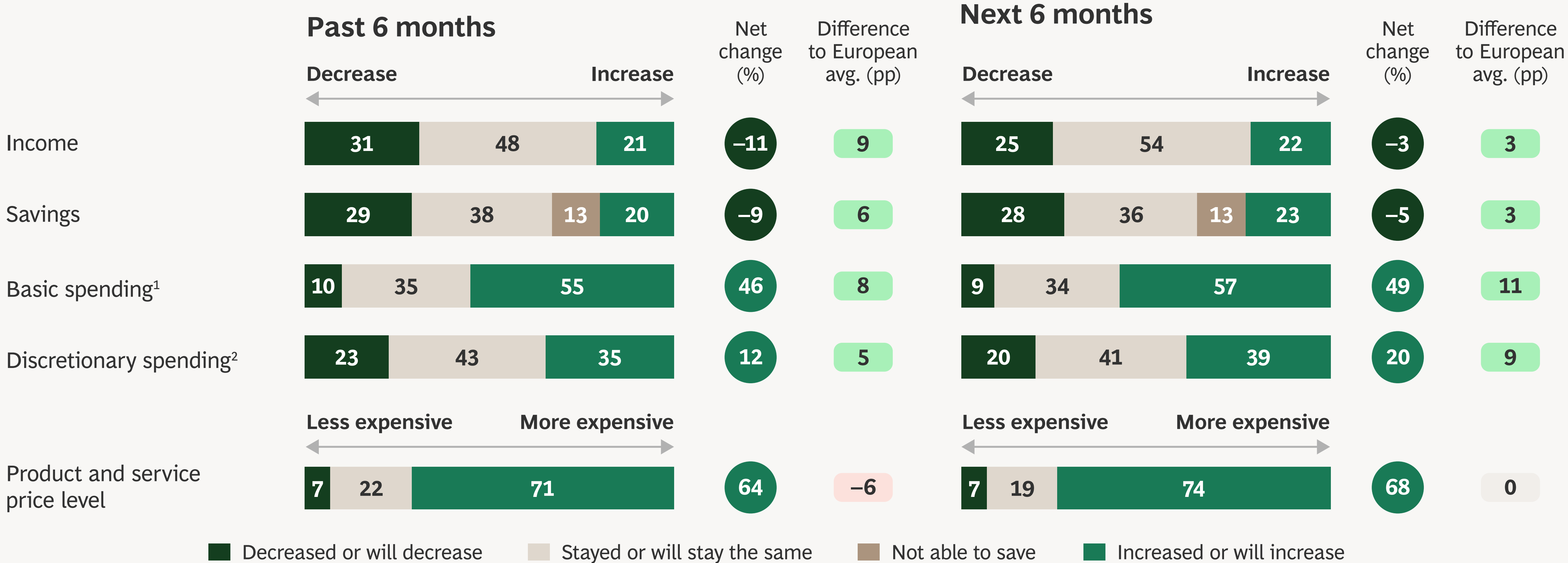
MOST EXPECTED IMPACT ON SPENDING<sup>2</sup> (HIGHEST % OF RESPONDENTS)



**Source:** 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 European countries; ~1,800 responses per country.  
<sup>1</sup>Question O2: Which of the following are you currently personally concerned by? Select all that apply. (Multiple selection. Bars show those who selected “yes.”) <sup>2</sup>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.)

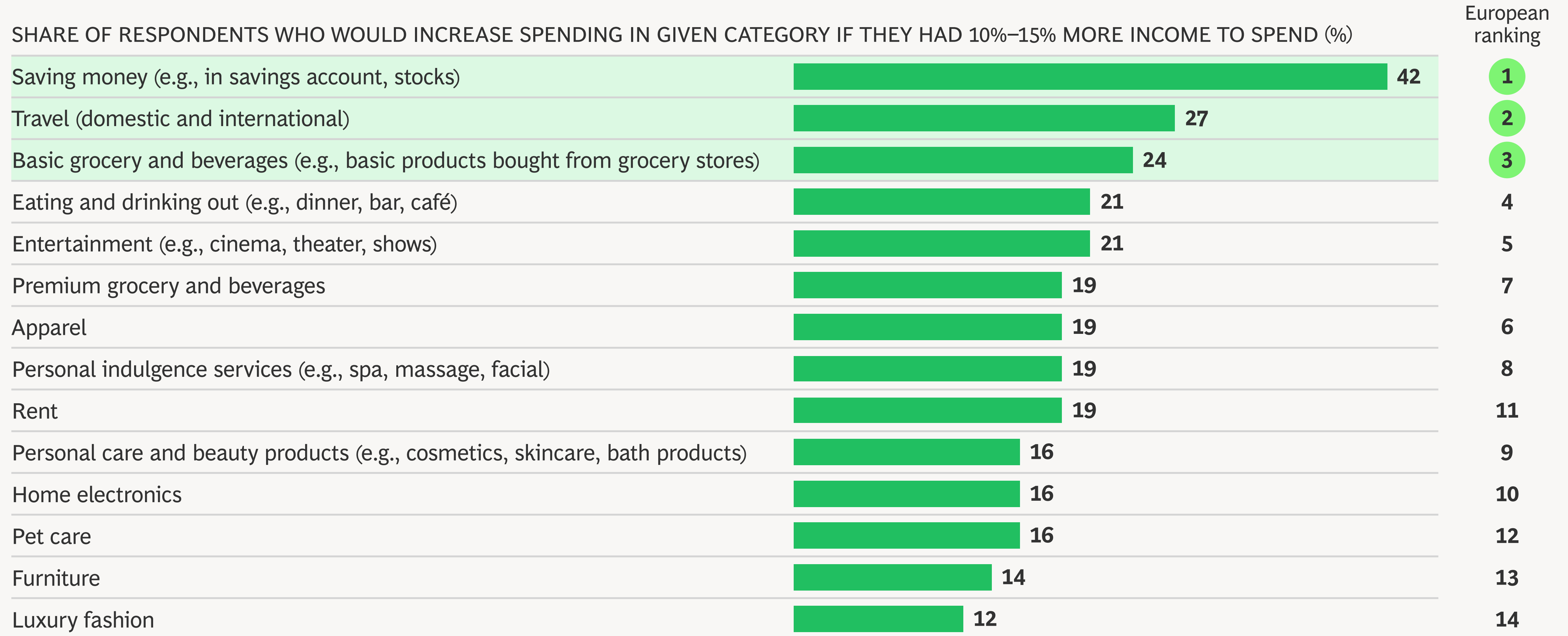
# Poles are more optimistic than average Europeans about their income and savings; they also expect a higher increase in spending

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? <sup>1</sup>19% of “Not able to save” is included in “Stayed or will stay the same” for both past and next six months. <sup>2</sup>e.g., housing, transport, medication, education, basic food. <sup>3</sup>e.g., clothing, dining out, concerts, entertainment.

# Savings are prioritized: 42% of respondents in Poland would allocate at least a part of a 10%–15% income boost to savings

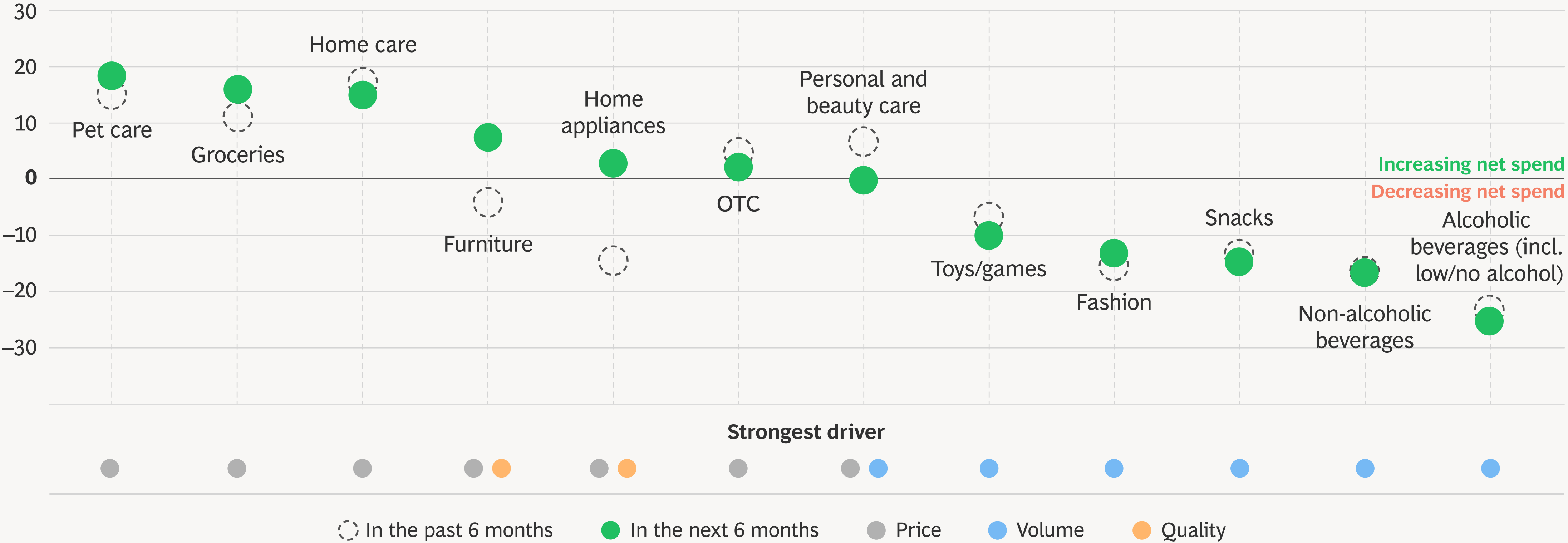


**Source:** 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.

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.]

# Polish Consumers prioritize essentials, including pet care products; spending increases are linked mainly to inflation rather than increased volume

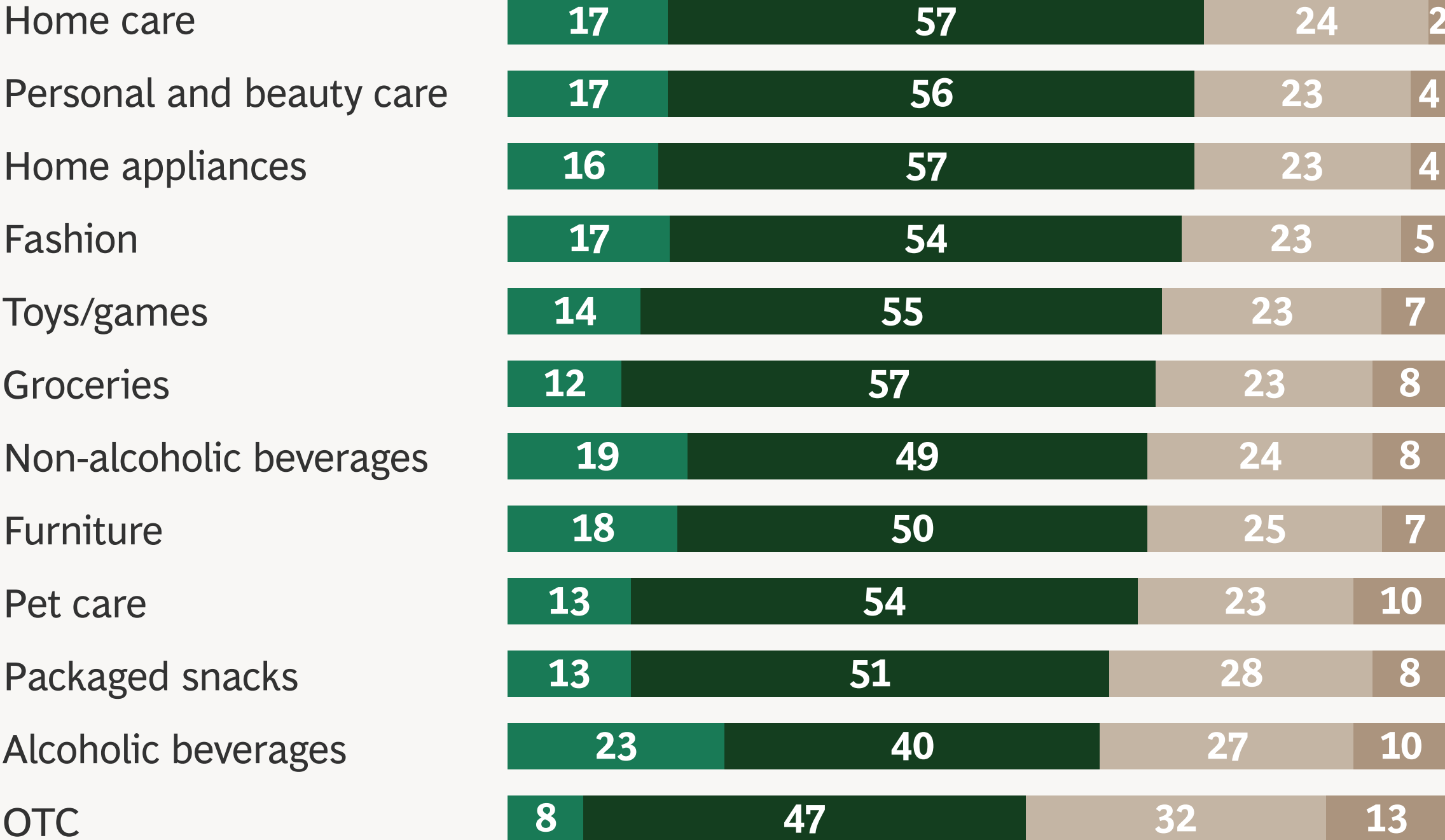
NET SPENDING CHANGE AMONG CONSUMERS WITHIN CATEGORY (PP)



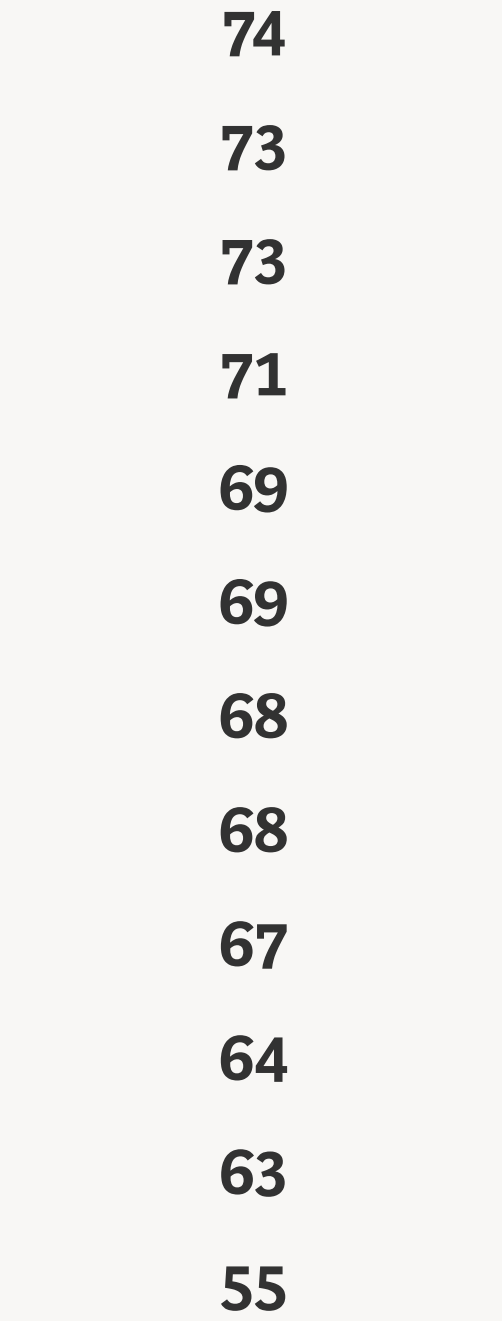
**Source:** 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.  
**Note:** Net spending is the percentage difference between the share of respondents indicating increased spending and those indicating decreased spending within a category. OTC & supplements = 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.)

# Polish consumers show strong discount-seeking behavior, with more than half of respondents making purchase decisions based on discounts

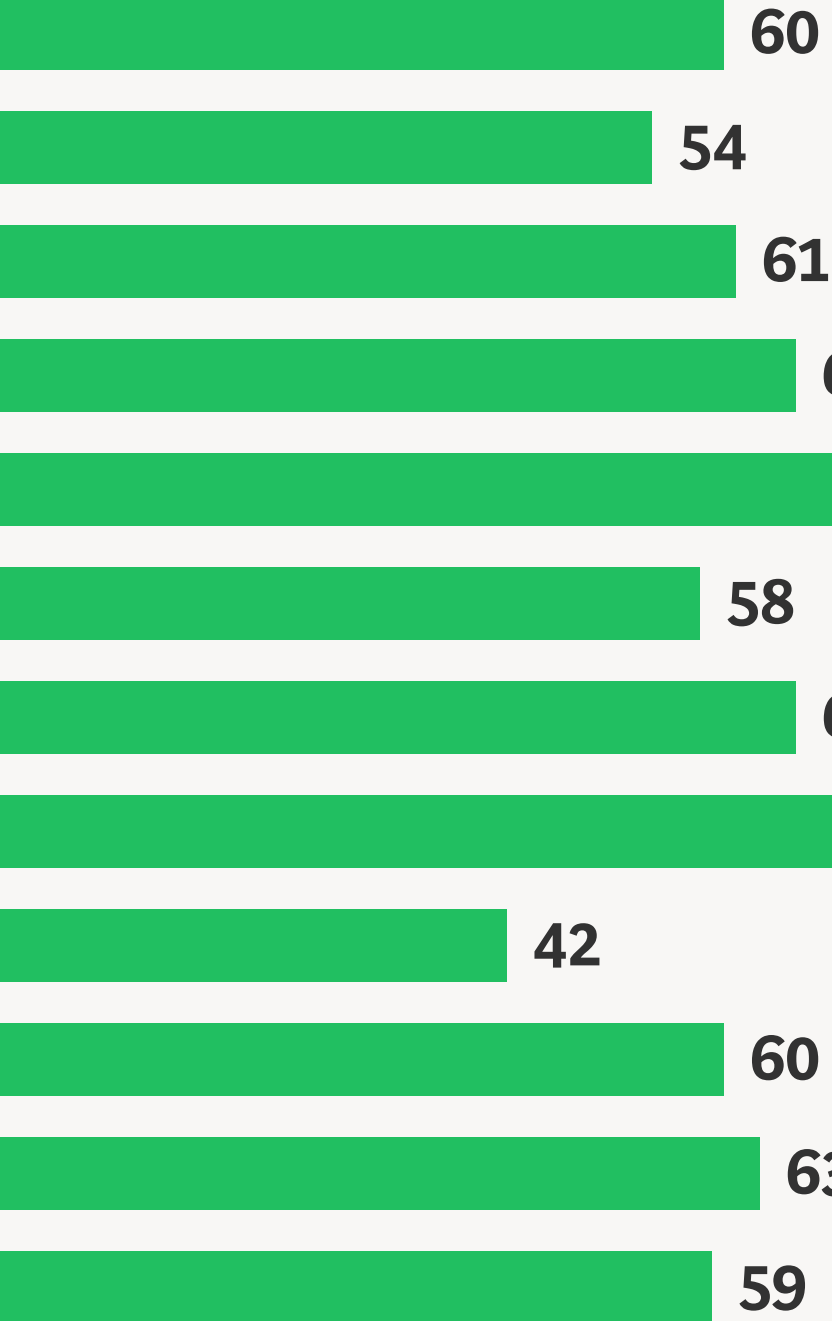
## DISCOUNT DRIVENNESS OF RESPONDENTS WITHIN A CATEGORY<sup>1</sup> (% OF RESPONSES)



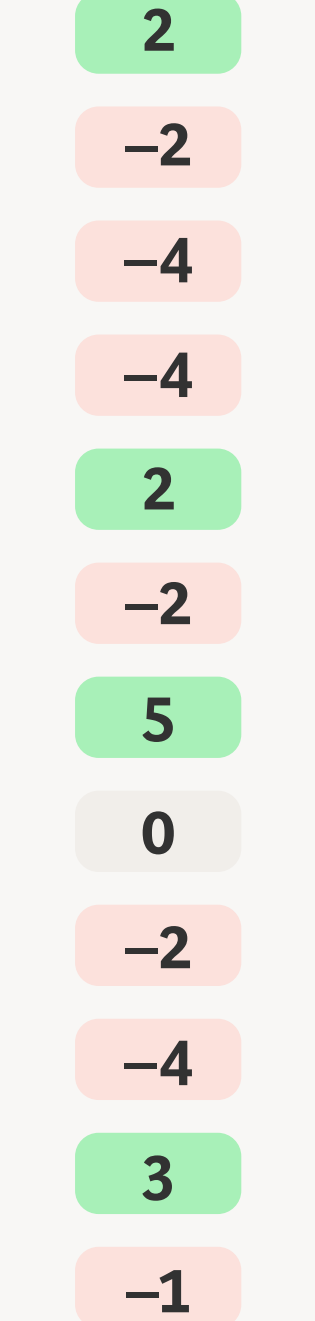
## % of purchase decisions actively driven by discounts



## % Polish respondents who indicate willingness to change brand if there were better offers<sup>2</sup>



## Difference to European avg. (pp)



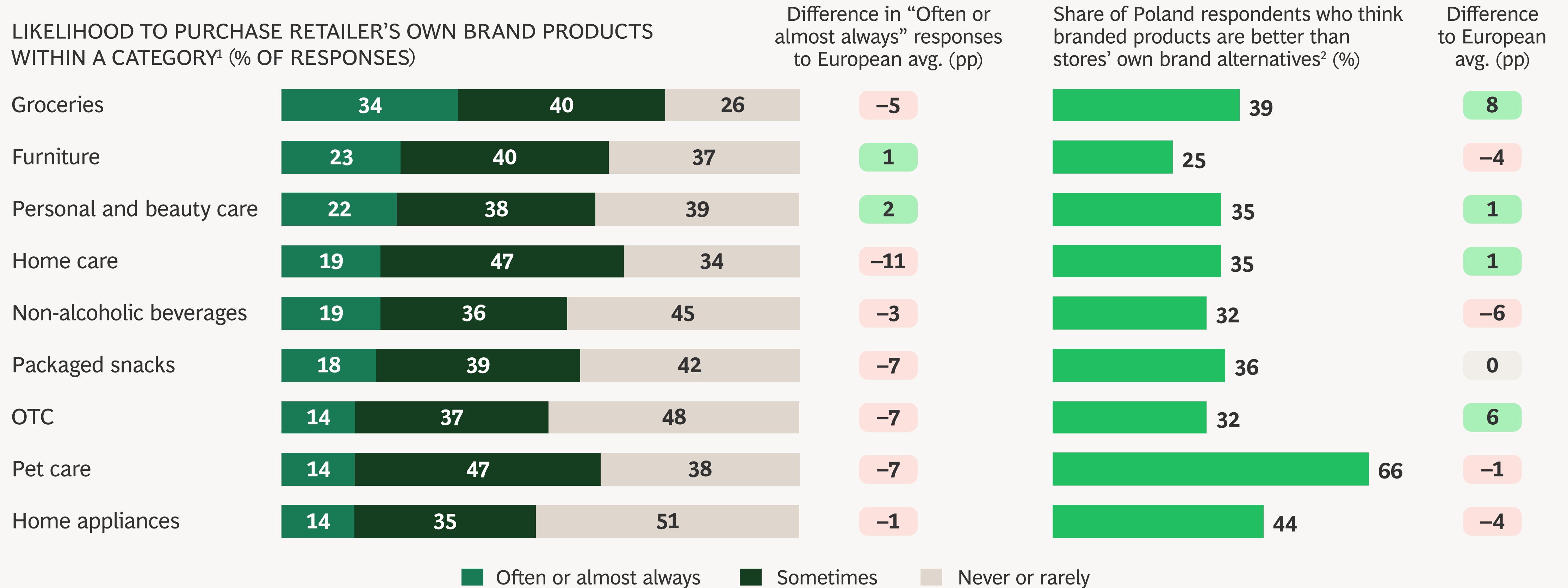
■ Only buying at discount  
 ■ Actively seeking discounts  
 ■ Not seeking discounts but may select discounted product if sees one  
 ■ Does not pay attention to prices or discounts

**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.

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

# Poland consumers are less open to retailer brands than other European consumers on average in most categories

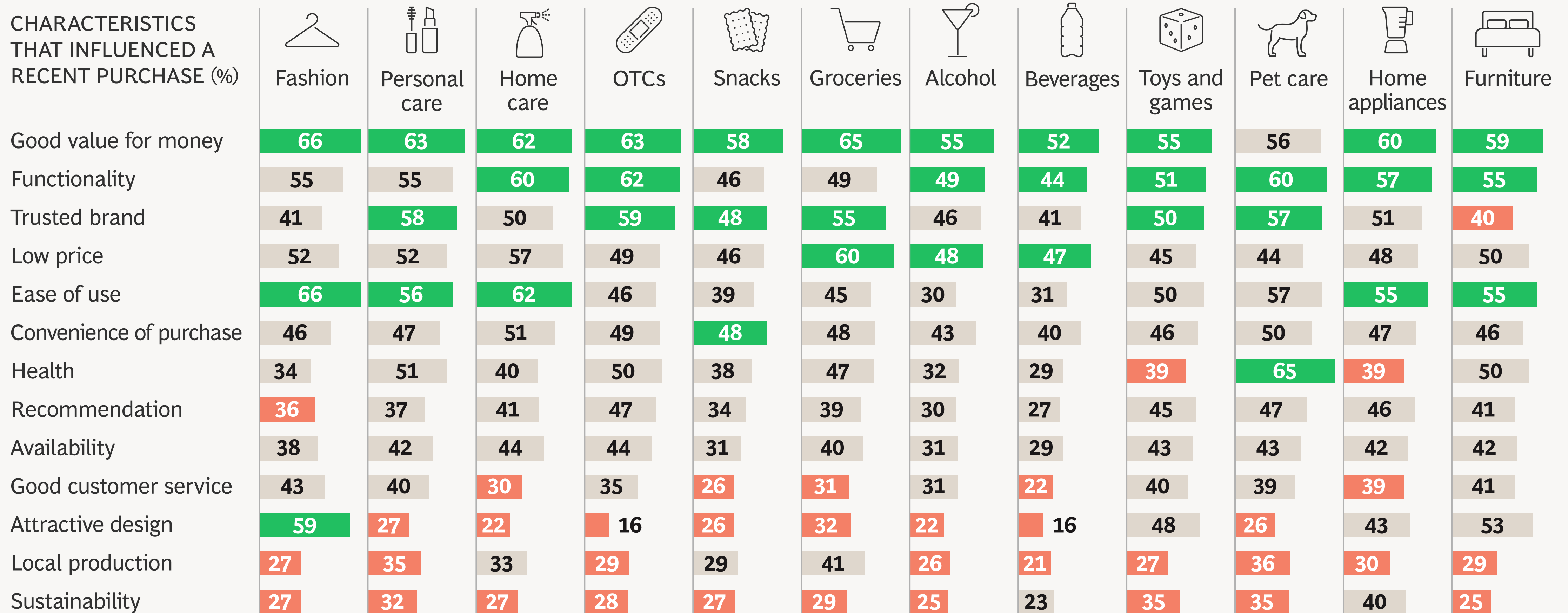


**Source:** 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.

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

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



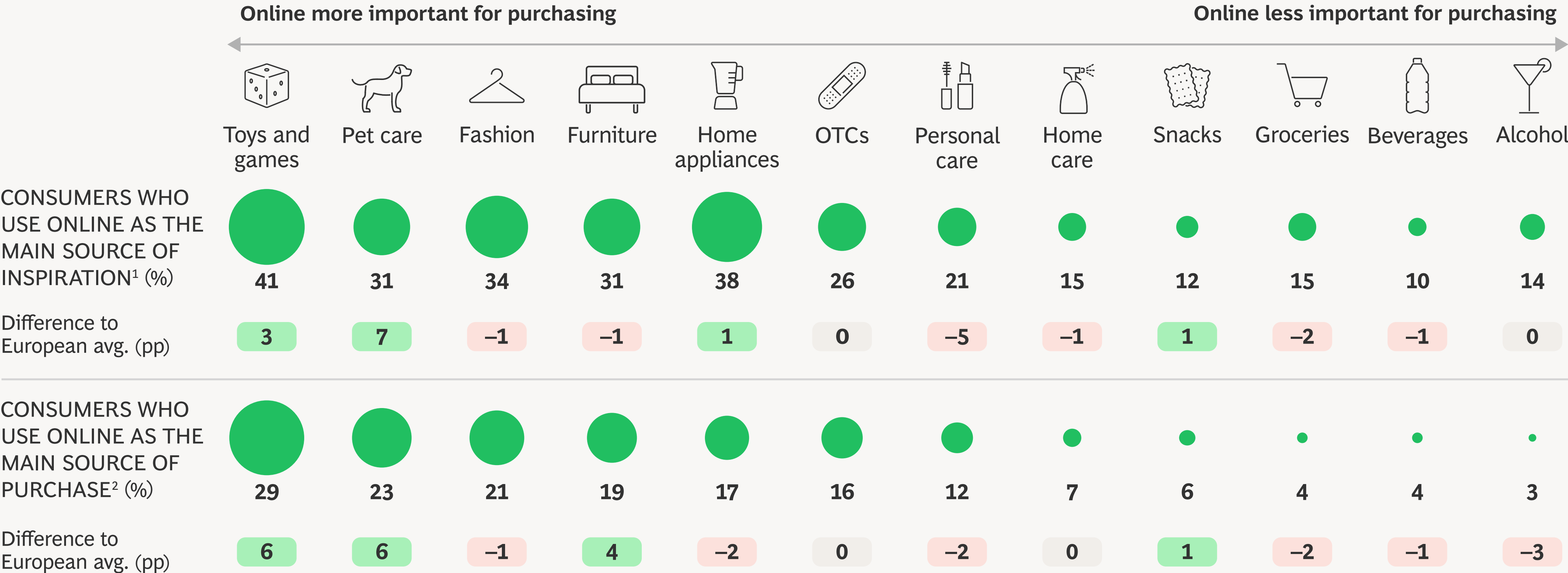
Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.

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

# Polish consumers are using online channels for pet care and toys much more than Europeans on average



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

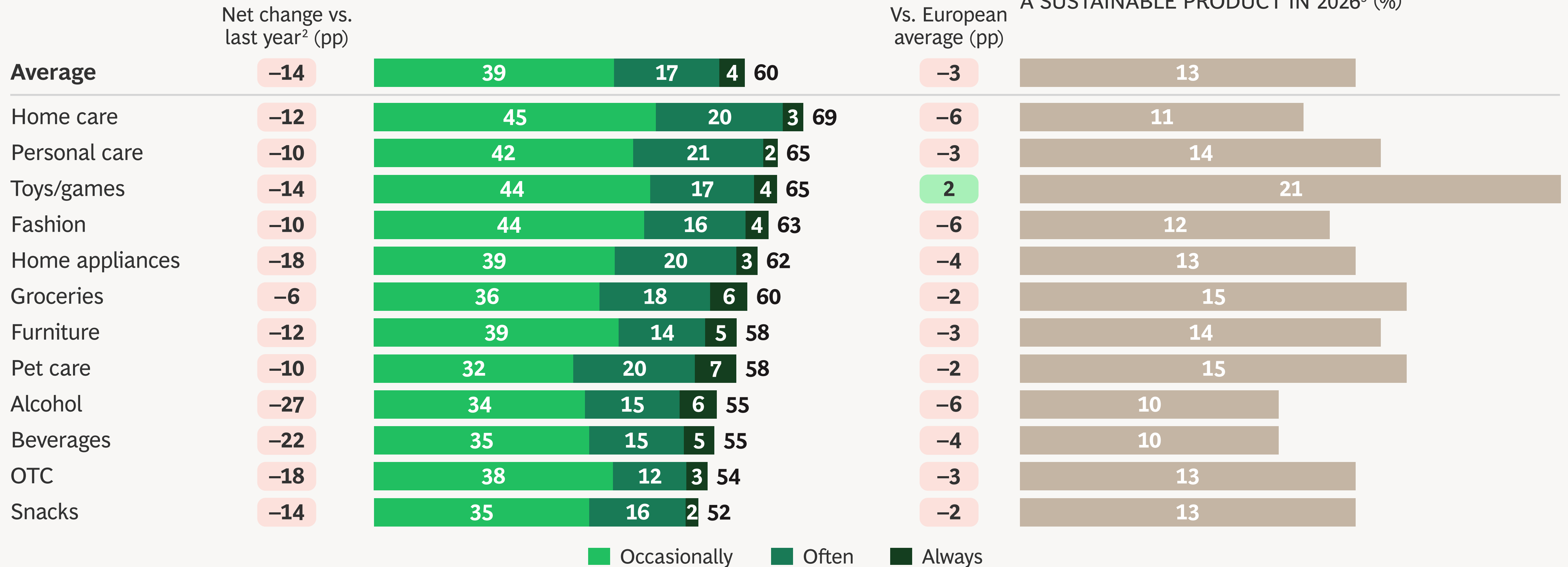
**Note:** OTC = Over-the-counter drugs and supplements.

<sup>1</sup>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.) <sup>2</sup>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 Polish consumers considering sustainability has dropped significantly since 2025, and only 13% are willing to pay a green premium

CONSUMERS WHO CONSIDER SUSTAINABILITY WHEN MAKING A PURCHASE IN 2026<sup>1</sup> (%)

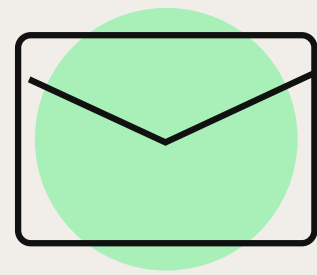
CONSUMERS WHO ARE WILLING TO PAY MORE FOR A SUSTAINABLE PRODUCT IN 2026<sup>3</sup> (%)



**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.

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



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