2026 Consumer Sentiment Survey

Sweden

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 Sweden 2026

Swedish consumers remain more optimistic than the European average. Swedish consumers' worries for economic situations remain lower than both 2025 and the European average

Swedish consumers are increasing their spending on household essentials such as groceries and home care, and this increase is driven by price inflation, not volume growth. Spending is notably rising among pet owners. At the same time, consumers are cutting back in other categories by actively seeking deals

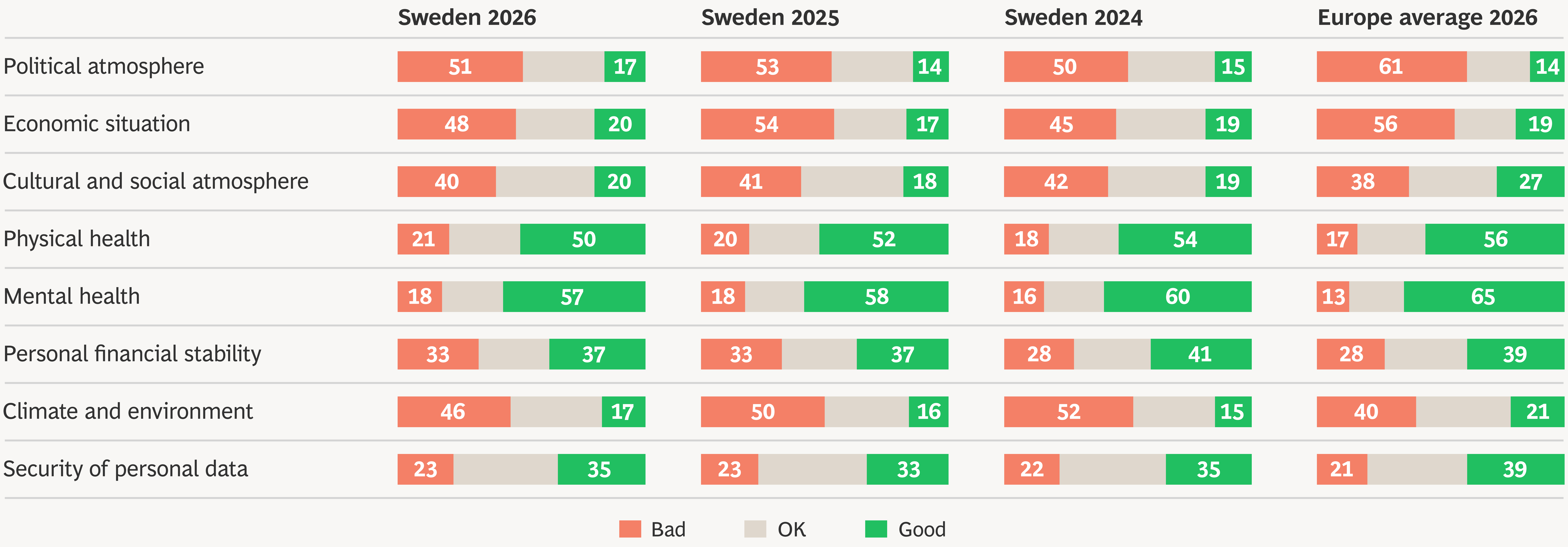
Price sensitivity strongly influences Swedish consumer behavior, with up to 67% of purchase decisions driven by discounts. Additionally, 42%–76% of consumers report a willingness to switch brands for better offers

Sweden shows average levels of online adoption among the countries surveyed, especially in categories such as toys and games, fashion, and pet care

Compared to 2024, consumer consideration for sustainability has significantly decreased. Compared to 2025, consumer consideration for sustainability has significantly decreased. Yet, **the share of consumers willing to pay a premium for sustainable products has remained stable**

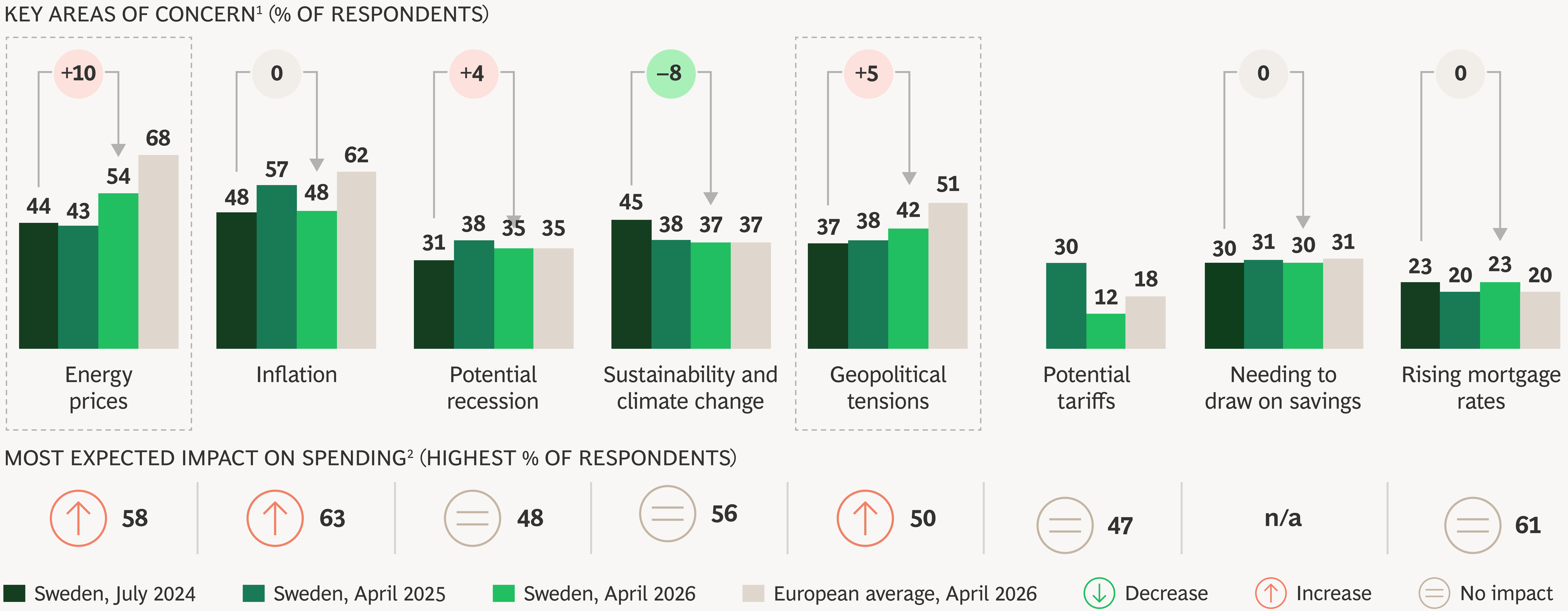
Swedish consumers are optimistic as economic concerns ease and report better mental health than the European average

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.)*

Financial concerns for energy prices and geopolitical tensions are peaking; however, they remain below the European average



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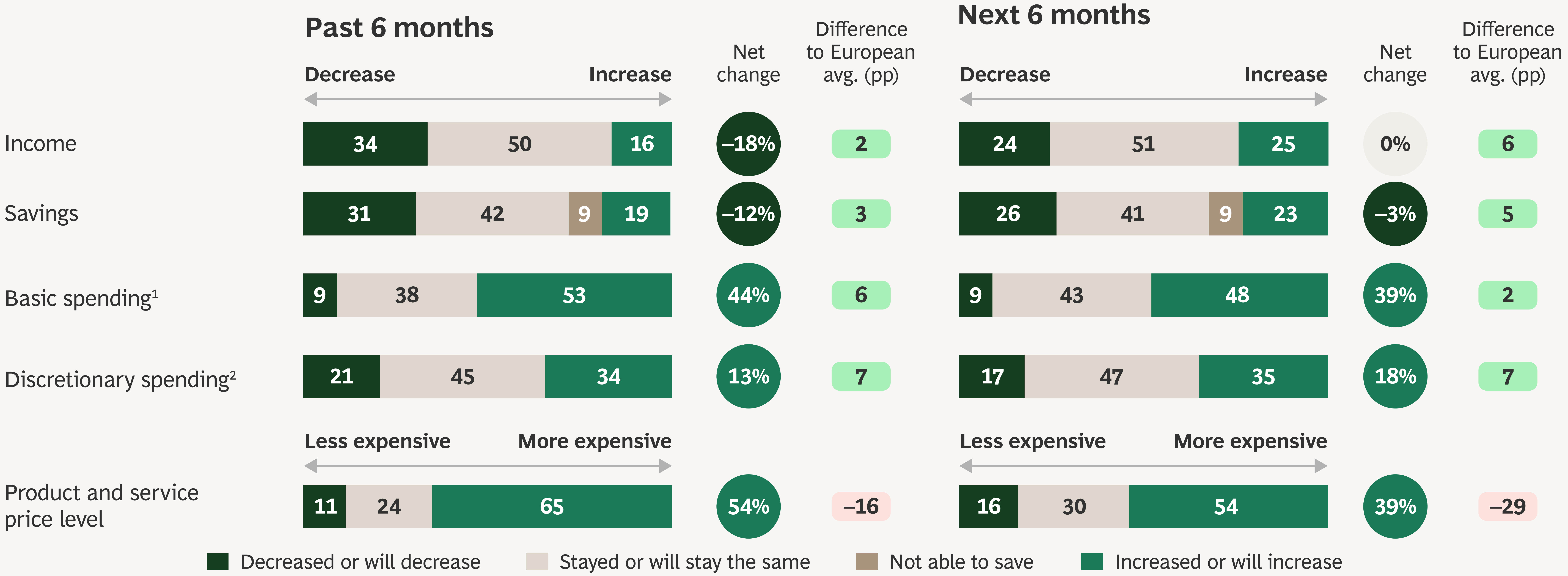
[1]Question O2: *Which of the following are you currently personally concerned by? Select all that apply.* (Multiple selection. Bars show those who selected "yes.")

[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.)

Swedish consumers anticipate an increased income and ability to spend, much higher than the European average

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?*
[1]e.g., housing, transport, medication, education, basic food. [2]e.g., clothing, dining out, concerts, entertainment.

Savings remain prioritized over consumption, yet Swedes' second priority is to indulge in the non-essentials, such as traveling and dining out

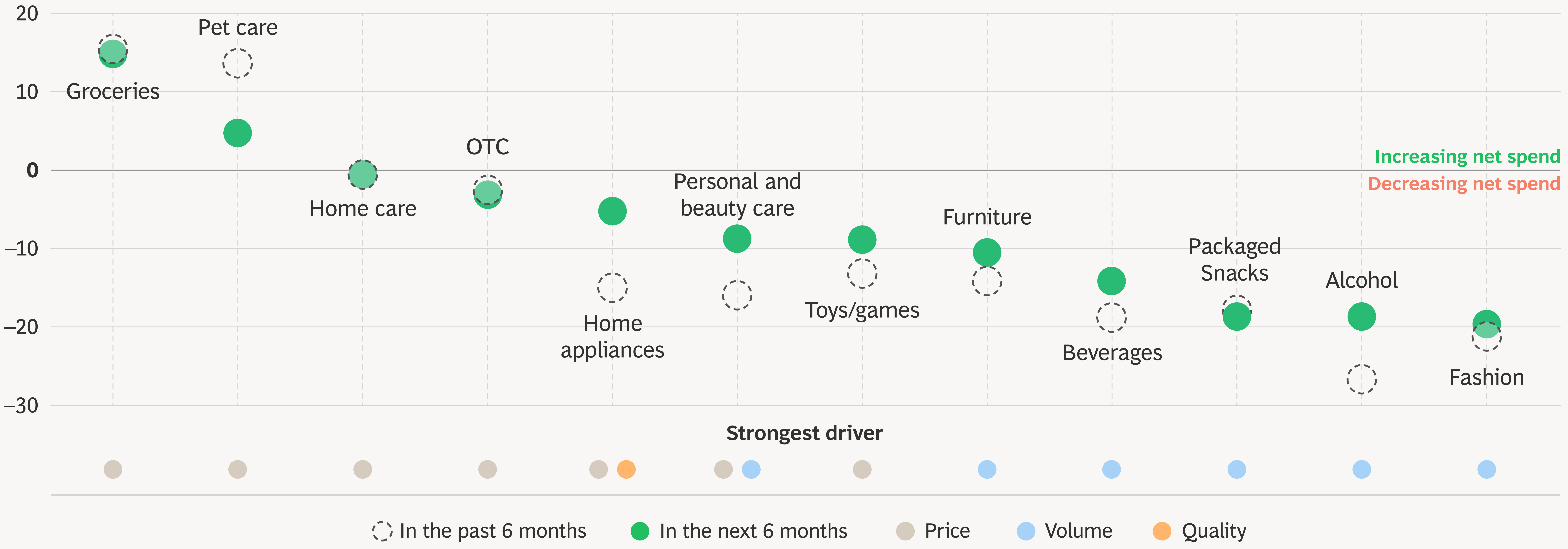
SHARE OF RESPONDENTS WHO WOULD INCREASE SPENDING IN GIVEN CATEGORY IF THEY HAD 10%–15% MORE INCOME TO SPEND (%)

		European ranking
Saving money (e.g., in savings account, stocks)	55	1
Travel (domestic and international)	33	2
Eating and drinking out (e.g., dinner, bar, café)	29	4
Basic grocery and beverages (e.g., basic products bought from grocery stores)	28	3
Entertainment (e.g., cinema, theater, shows)	26	5
Personal indulgence services (e.g., spa, massage, facial)	25	8
Apparel	25	6
Premium grocery and beverages	22	7
Personal care and beauty products (e.g., cosmetics, skincare, bath products)	19	9
Furniture	19	13
Rent	19	11
Home electronics	18	10
Pet care	16	12
Luxury fashion	13	14

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.)*

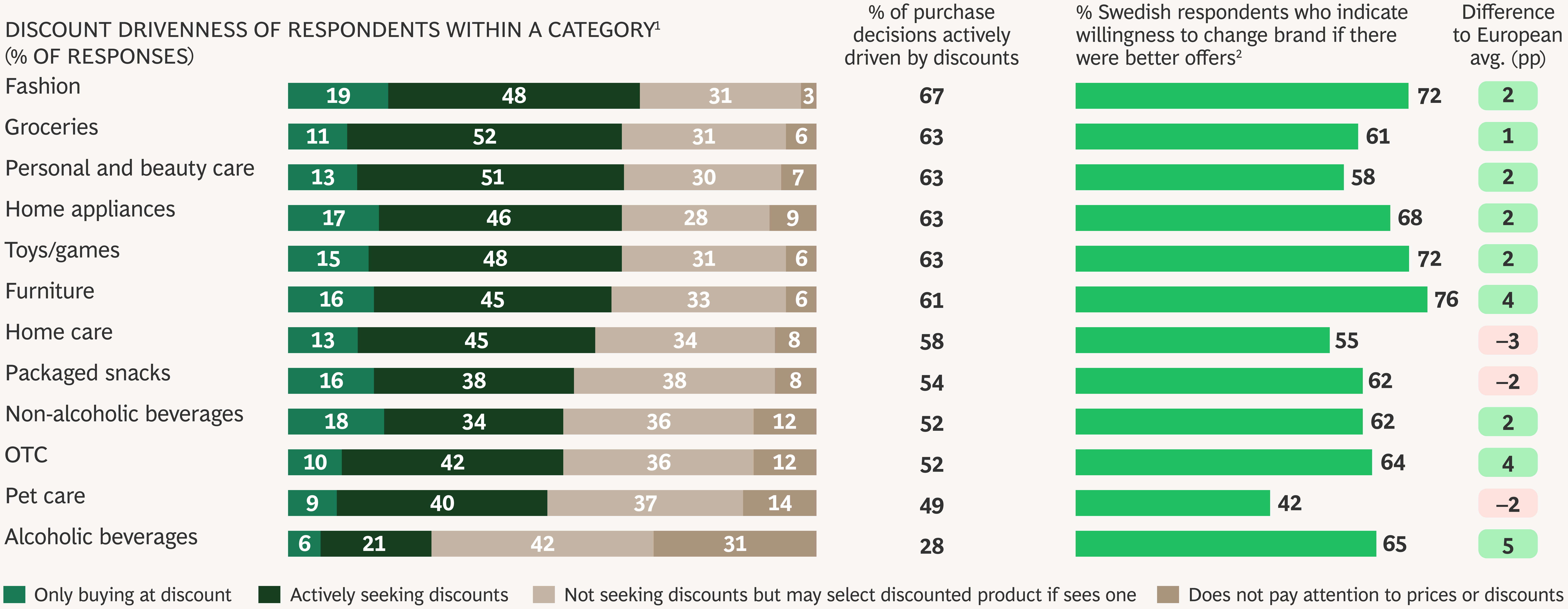
Swedish consumers continue prioritizing essential items; spend increases are linked to inflation and decreases are linked to deal seeking or cutting volume

NET SPENDING CHANGE AMONG CONSUMERS WITHIN CATEGORY (PP)



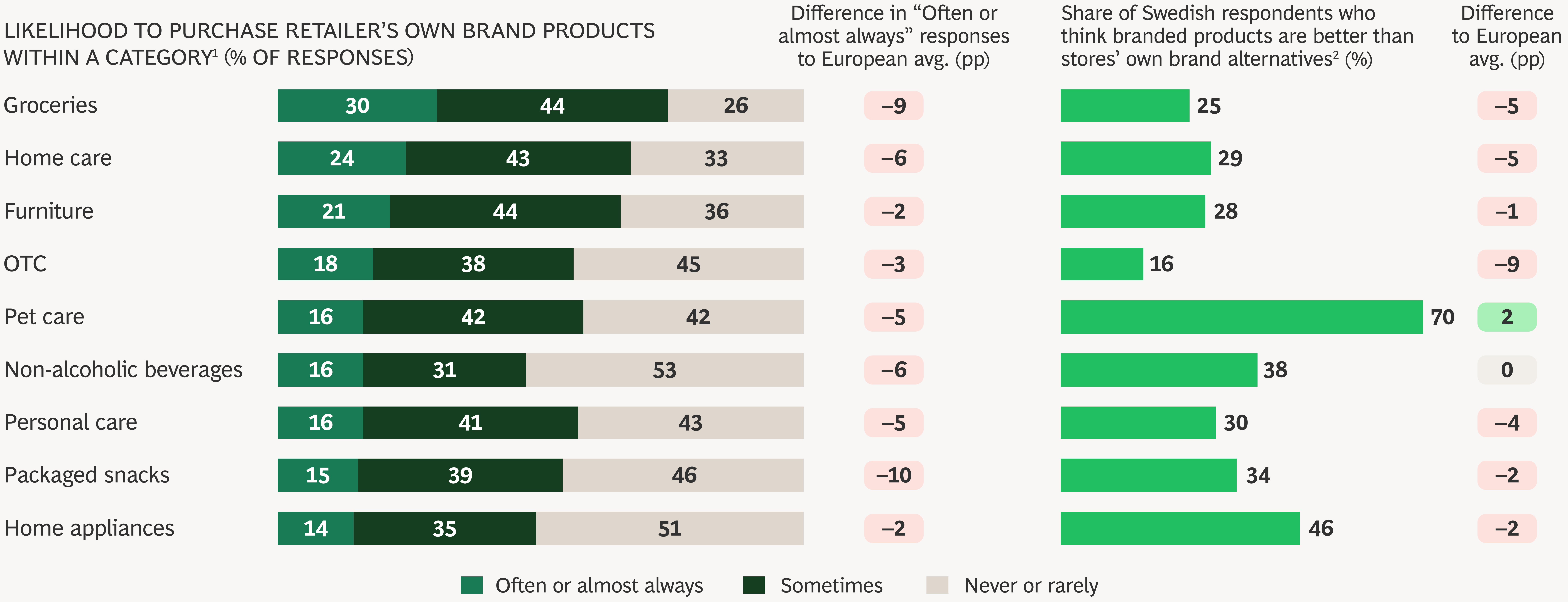
Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.
Note: Net spending is the percentage difference between the share of respondents indicating increased spending and those indicating decreased spending within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

Up to 67% of Swedish consumers' purchase decisions are actively driven by discounts, and 42%–76% 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.
[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.)*

Swedish consumers shop retailers' own brands less frequently than the European average, especially within groceries and packaged snacks



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, functionality, and ease of use are the top drivers in purchasing decisions in most categories

CHARACTERISTICS THAT INFLUENCED A RECENT PURCHASE (%)	Fashion	Personal care	Home care	OTCs	Snacks	Groceries	Alcohol	Beverages	Toys and games	Pet care	Home appliances	Furniture
Good value for money	62	58	62	59	49	59	49	49	55	60	54	57
Trusted brand	38	49	42	50	41	48	35	37	36	50	44	38
Convenience	42	42	43	42	34	39	32	38	38	48	38	42
Functionality	38	43	50	53	37	43	52	47	36	53	47	36
Ease of use	57	47	50	35	18	19	15	27	39	52	50	47
Low price	45	44	44	48	38	48	34	38	43	41	43	42
Availability	41	38	48	46	42	44	42	38	38	52	43	41
Health	22	28	31	40	17	27	15	19	27	66	30	35
Good customer service	38	31	23	25	13	28	18	16	31	35	37	32
Attractive design	63	14	13	9	11	12	13	12	33	13	28	54
Recommendations	22	26	26	29	17	19	19	16	32	30	36	29
Sustainability	23	28	26	20	19	23	16	20	26	24	28	31
Local production	16	17	19	16	17	23	15	17	17	21	24	23

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

Swedish consumers are using online channels for purchasing less than Europeans on average

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

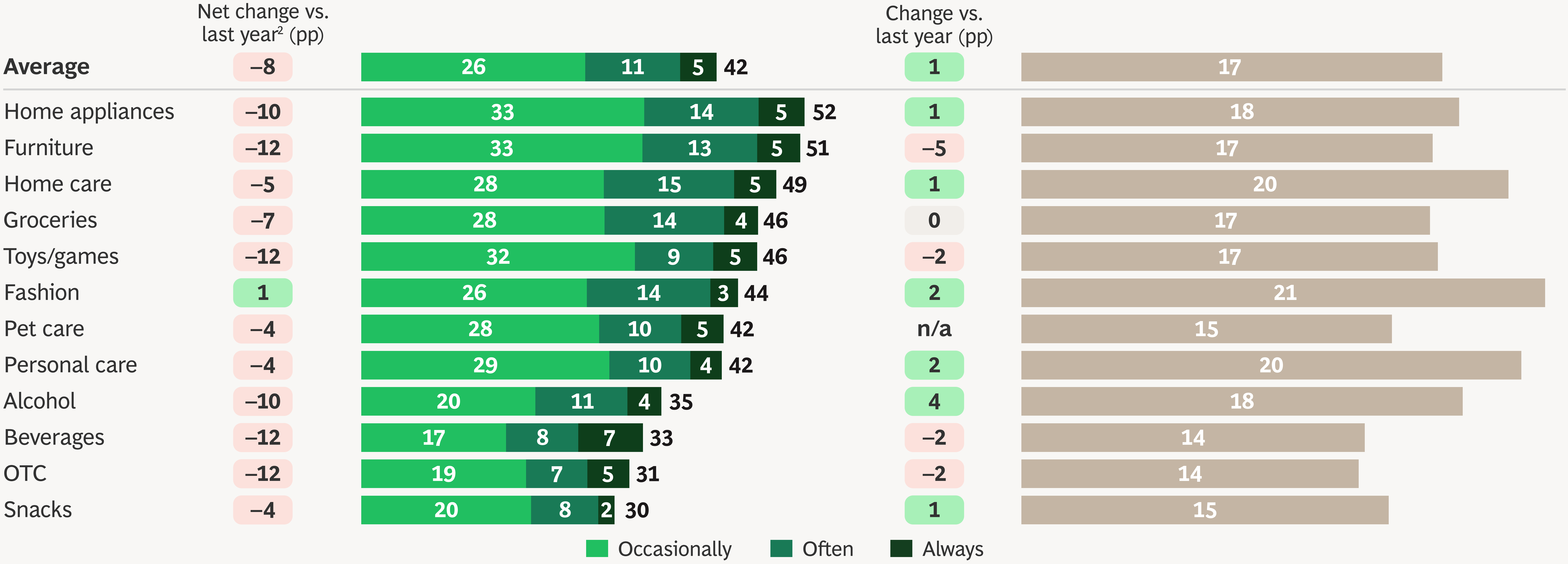
	OTCs	Toys and games	Fashion	Personal care	Pet care	Home appliances	Furniture	Home care	Groceries	Alcohol	Beverages	Snacks
CONSUMERS WHO USE ONLINE AS THE MAIN SOURCE OF INSPIRATION[1] (%)	43	43	39	32	29	41	36	17	15	23	15	8
Difference to European avg. (pp)	17	5	5	6	4	3	3	1	2	9	4	–2
CONSUMERS WHO USE ONLINE AS THE MAIN SOURCE OF PURCHASE[2] (%)	32	22	21	19	17	16	14	8	6	6	6	4
Difference to European avg. (pp)	16	–1	0	4	1	–4	–1	2	0	0	1	–1

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 consumers considering sustainability has dropped significantly, yet willingness to pay a green premium remains stable

CONSUMERS WHO CONSIDER SUSTAINABILITY WHEN MAKING A PURCHASE IN 2026[1] (%)

CONSUMERS WHO ARE WILLING TO PAY MORE FOR A SUSTAINABLE PRODUCT IN 2026[3] (%)



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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