



2026 Consumer Sentiment Survey

France

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 France 2026



Pessimism is further rising. French consumers are increasingly worried about the local economic outlook and their personal financial situation compared to 2025, marking concerns much higher than the European average. On the other hand, climate concerns have decreased substantially, as have worries about inflation (except for energy prices)



French consumers are increasing their spending on household essentials such as groceries and home care, primarily driven by price inflation. Spending is also rising among pet owners, where volume is holding steady. At the same time, consumers are **cutting back in other categories** by reducing purchase frequency or actively seeking deals



Savings remain at the forefront of consumers' minds. If consumers were to receive a 10% to 15% boost in income, 40% would allocate more to savings. The same share fear they will have to draw on savings in the year ahead



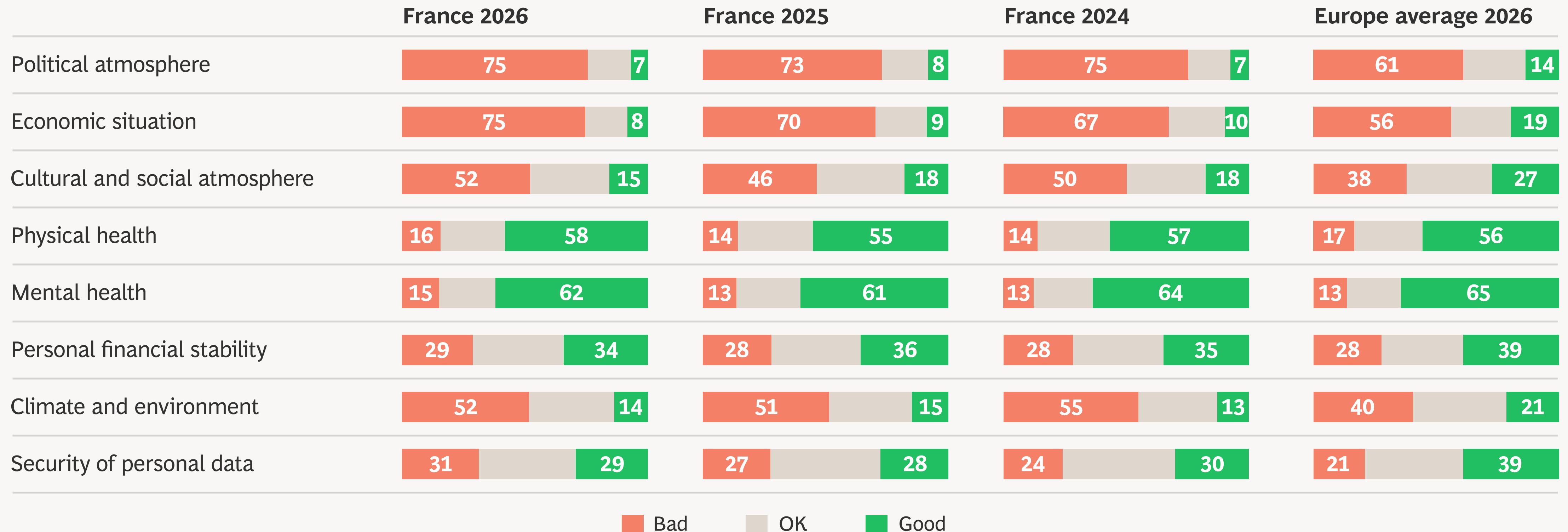
Price sensitivity strongly influences French consumer behavior, but less than other European consumers, as French consumers seek a trusted brand over and above a low price (a behavior consistent with past years' surveys)



Consideration for sustainability and willingness to pay a green premium has slightly declined among French consumers

Personal financial stability shows deterioration vs. the European average, echoing French pessimism amid economic and geopolitical pressures

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

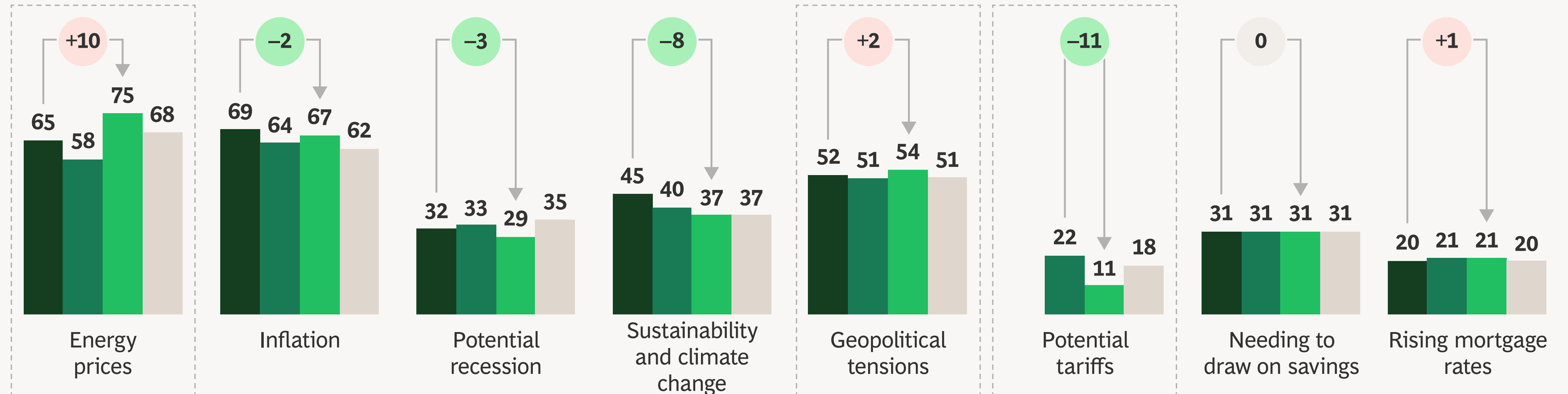


Sources: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries (~1,800 responses per country); 2025 BCG European Consumer Sentiment Survey; 2024 BCG European Consumer Sentiment Survey.

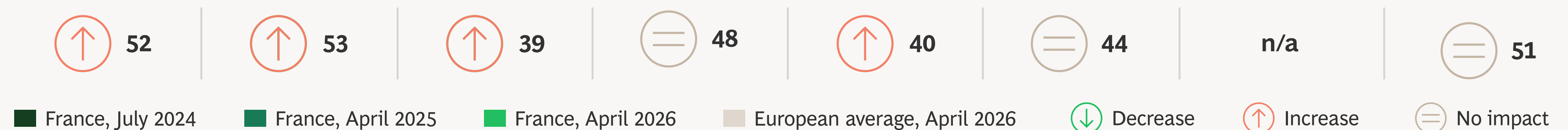
Question O1: How do you currently feel about each of the following? (Response options: Very bad, Bad, Neither good nor bad, Good, Very good. Results shown as Bad, OK, and Good.)

French concerns shift from climate change and tariffs towards energy prices and geopolitical tensions, peaking after some relief last year

KEY AREAS OF CONCERN¹ (% OF RESPONDENTS)



MOST EXPECTED IMPACT ON SPENDING² (HIGHEST % OF RESPONDENTS)

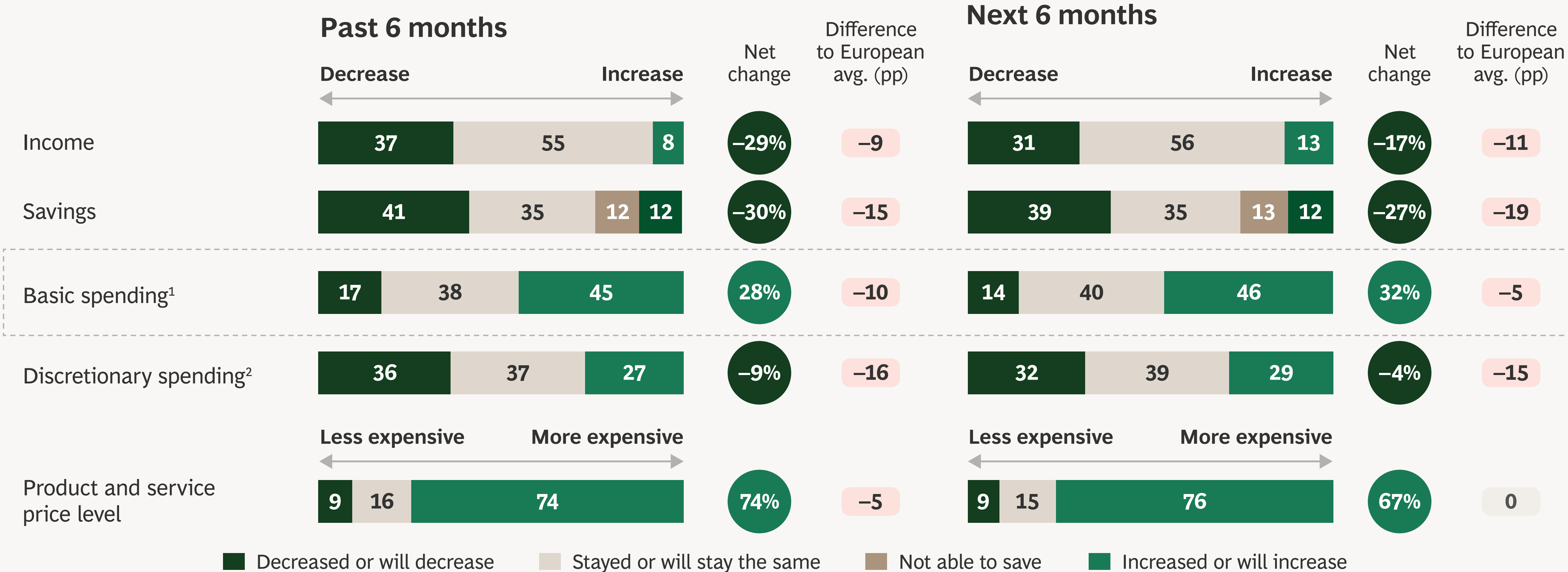


Sources: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries (~1,800 responses per country); 2025 BCG European Consumer Sentiment Survey; 2024 BCG European Consumer Sentiment Survey.

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.)

French consumers anticipate much higher cost pressure than European peers, as prices and essential spending rise while net income declines

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 remain prioritized over consumption: 40% of French respondents would allocate at least part of a 10%–15% income boost to savings

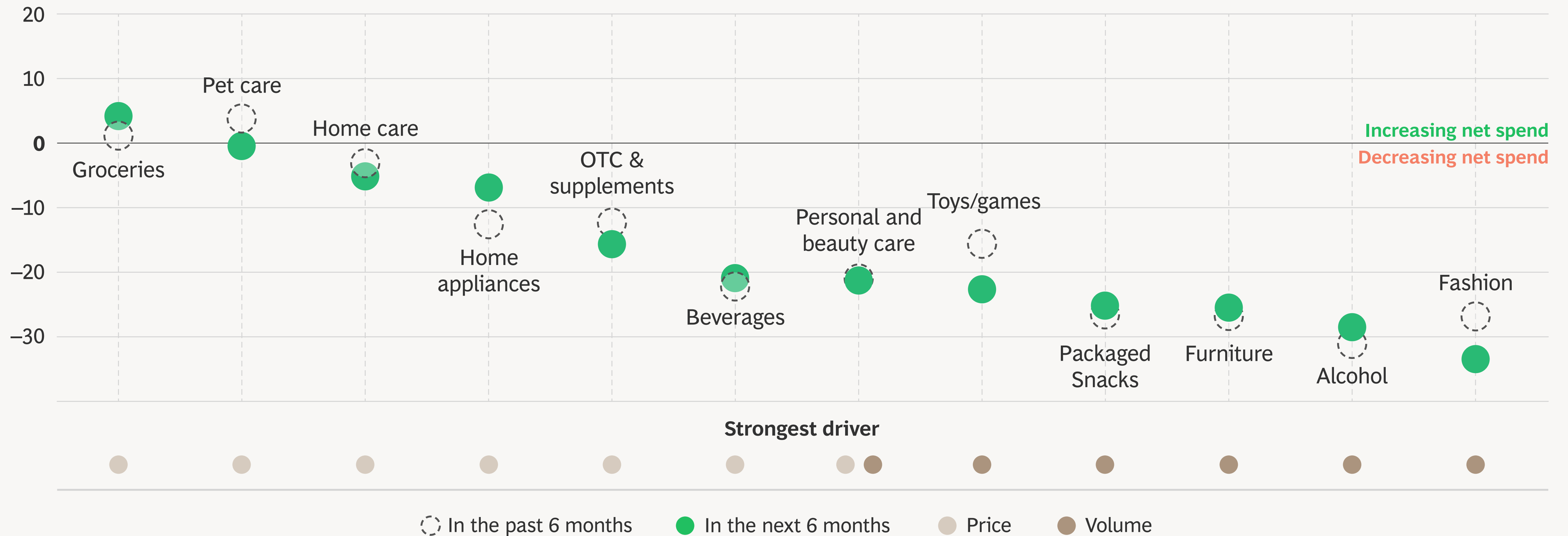


Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.

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.]

French consumers continue prioritizing essentials; increases in spending in categories such as groceries are entirely price-linked

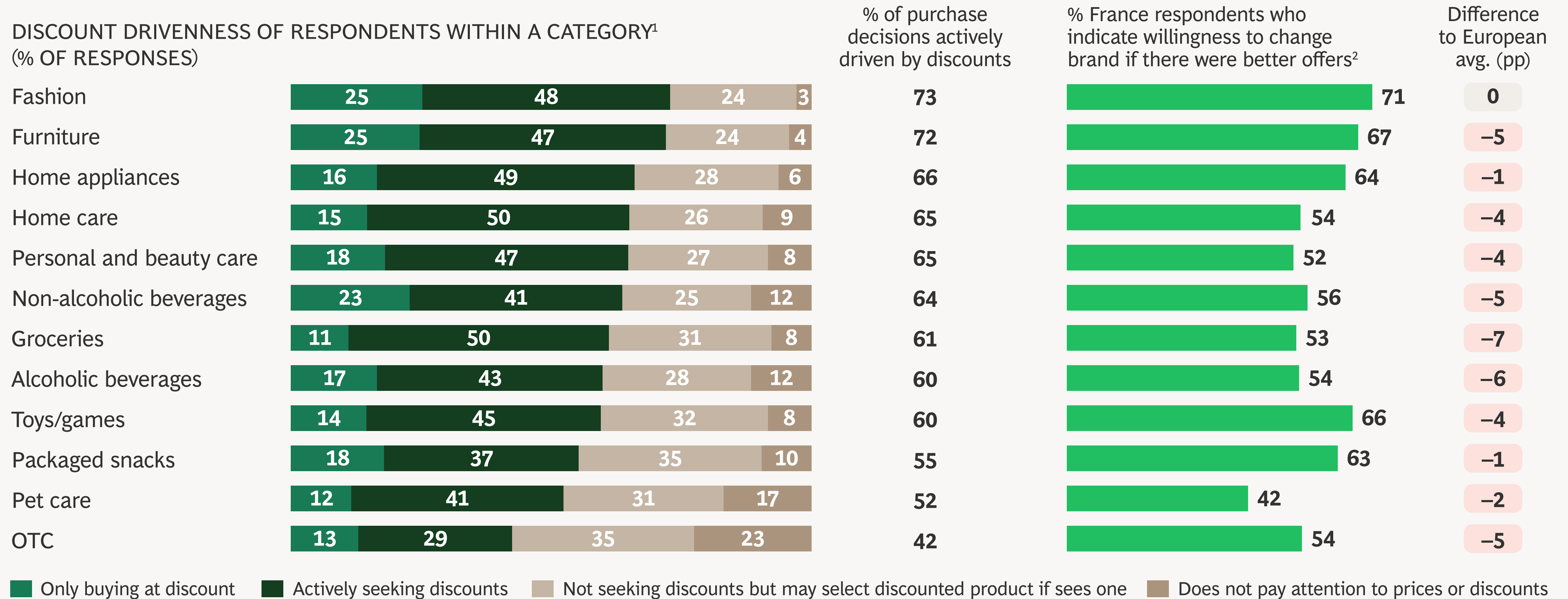
NET SPENDING CHANGE AMONG CONSUMERS WITHIN CATEGORY (PP)



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.)*

Many French consumers' purchases are driven by discounts, yet their desire to switch to lower priced brands is less than European average

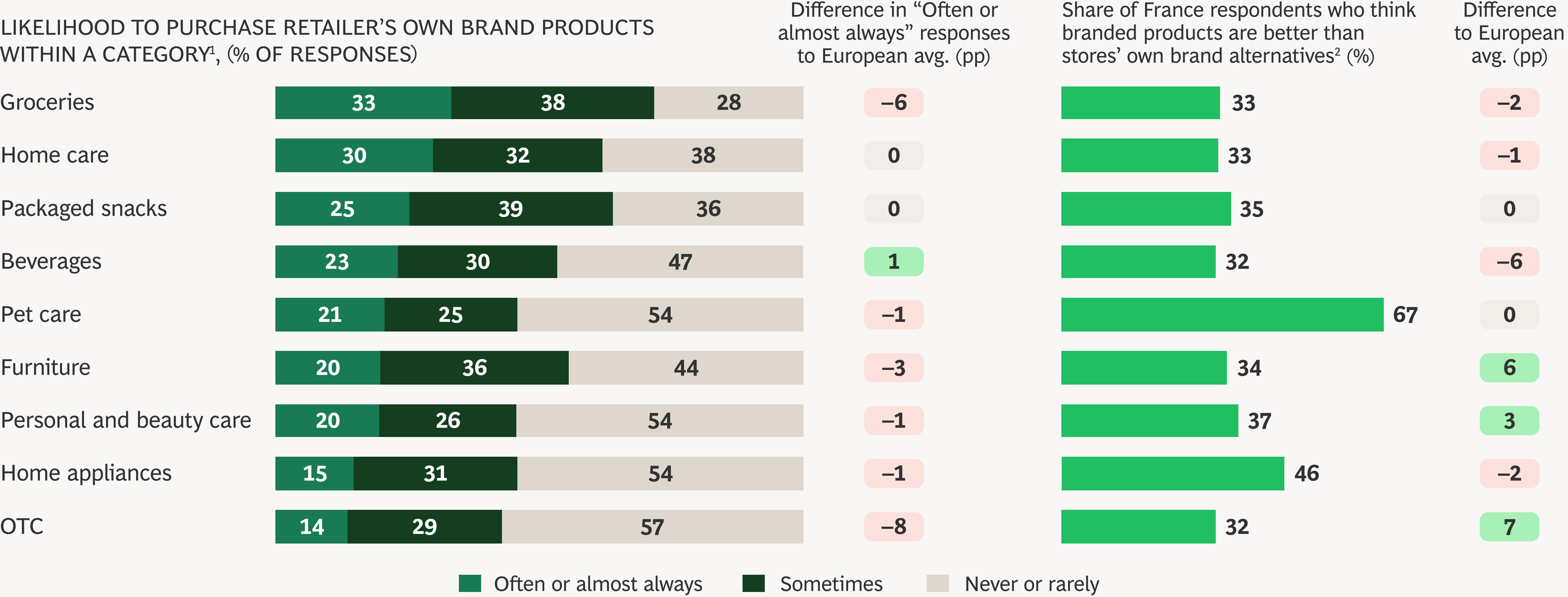


Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.

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

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.)

French consumers are less receptive to own-brand products than the European average, despite no strong quality-driven preference

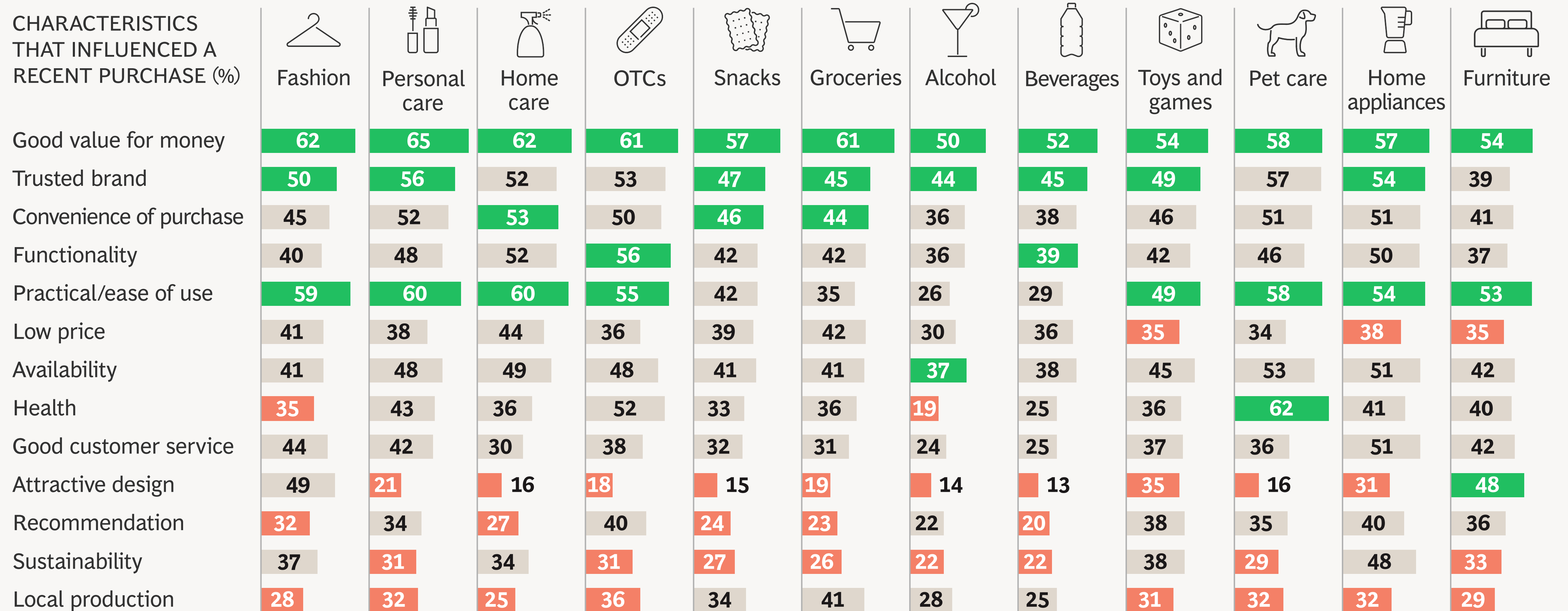


Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.

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 and a trusted brand are the top characteristics in most categories, while sustainability gets consistently deprioritized



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

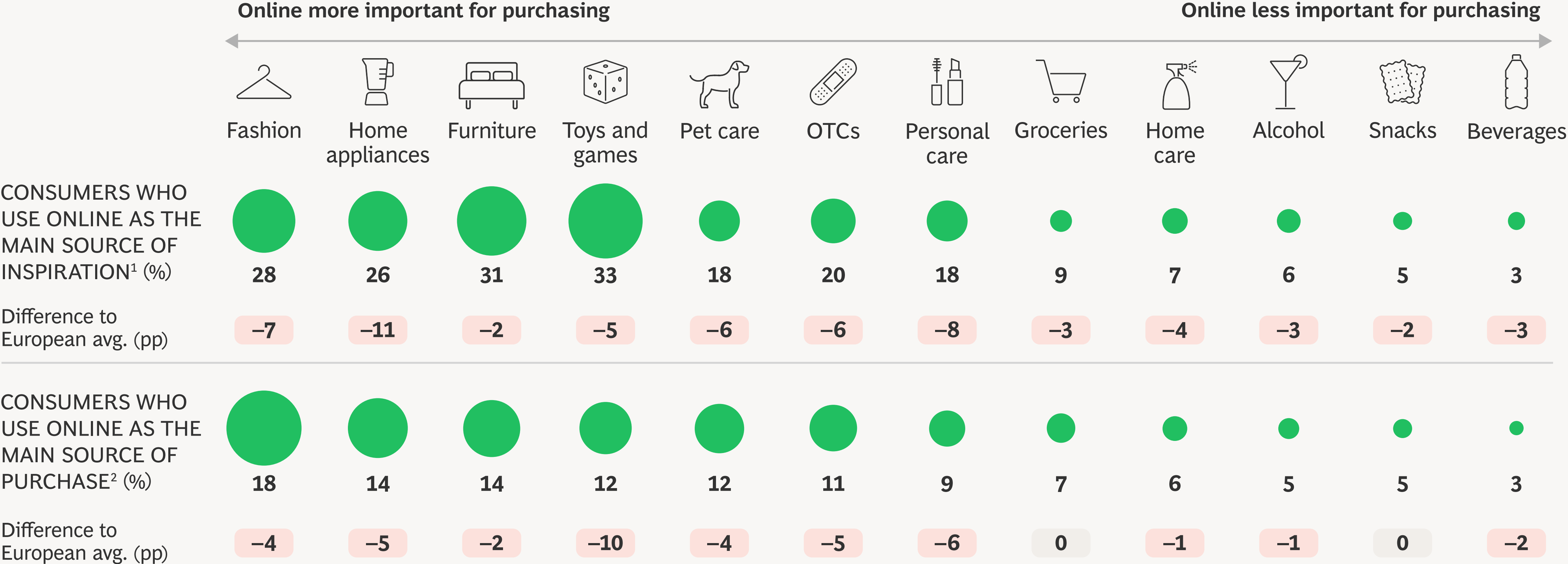
Note: KPC = Key purchasing criteria; OTCs = Over-the-counter drugs and supplements.

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

Online adoption for French consumers remains below the European average across categories



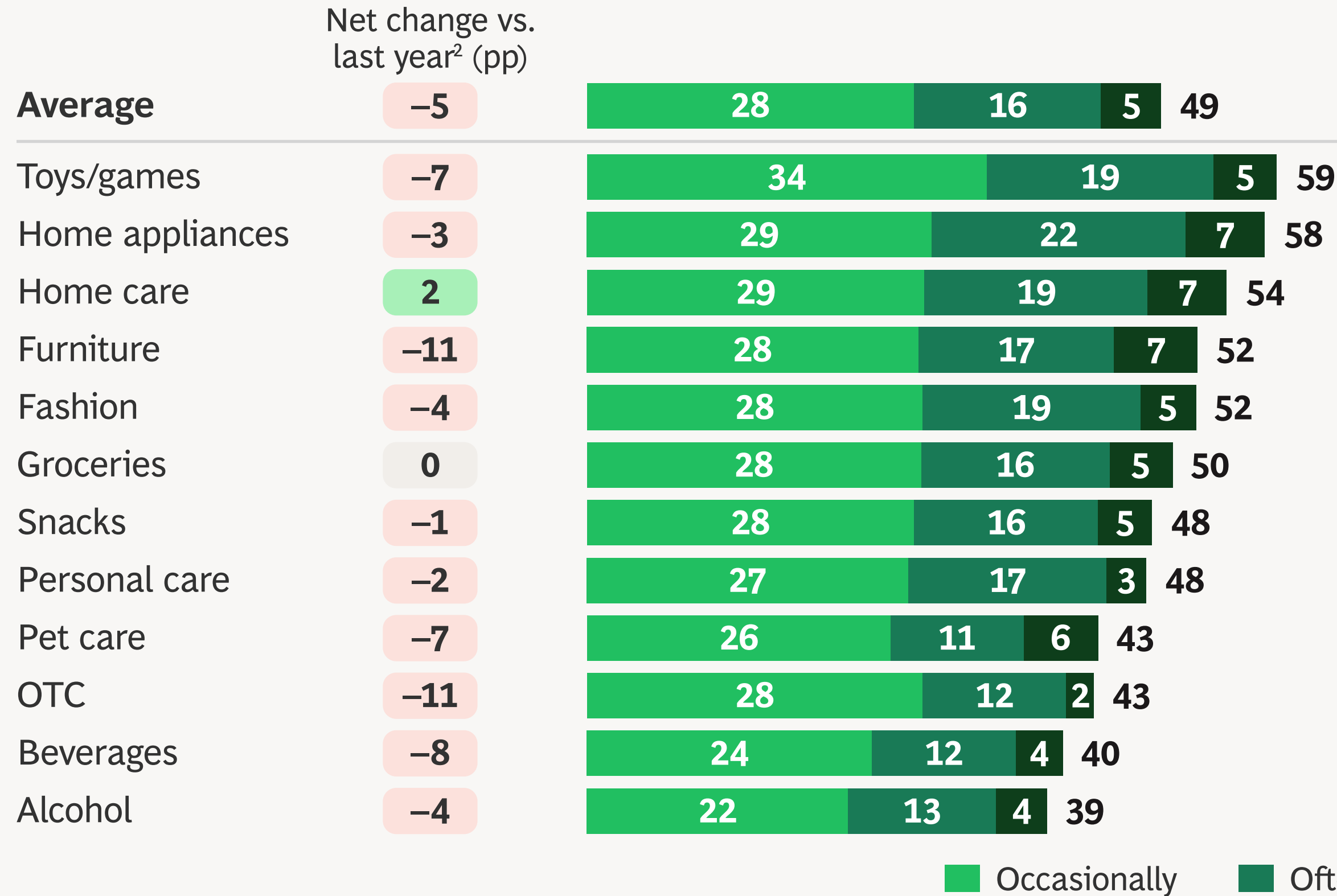
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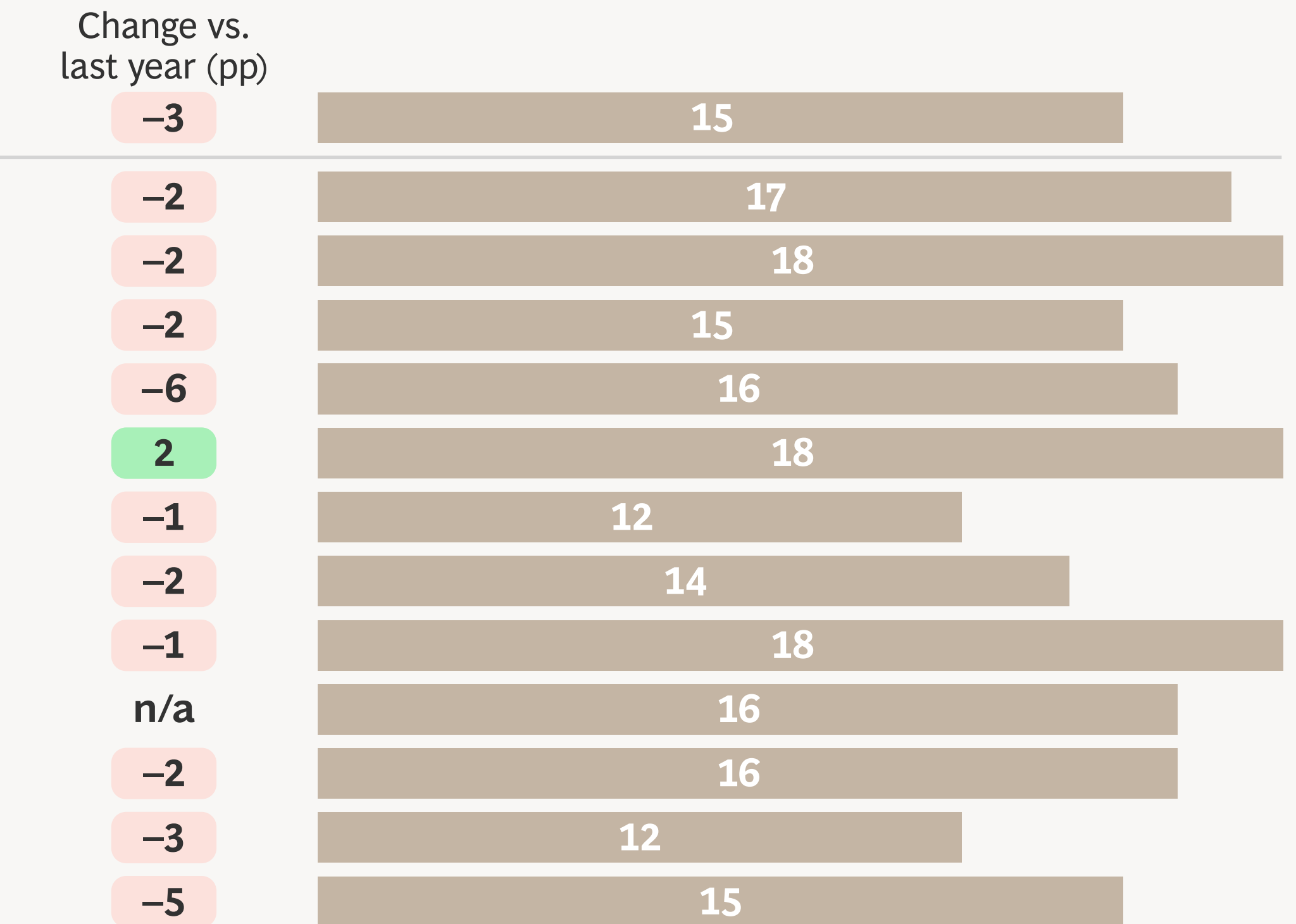
¹Question C4.1: Thinking about when you're deciding to purchase [category], how would you typically browse, research, or look for inspiration on what to buy? (Response options: Mostly online, Mixed, Mostly offline.) ²Question C4.3: Thinking about when it comes to making a purchase of [category], what 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 consumers considering sustainability decreases, and the say-do gap persists, whereby only 15% are willing to pay a green premium

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



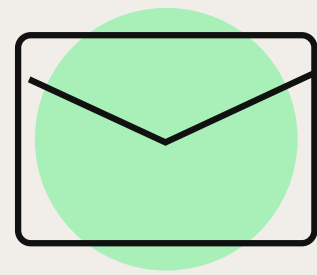
CONSUMERS WHO ARE WILLING TO PAY MORE FOR A SUSTAINABLE PRODUCT IN 2026³ (%)



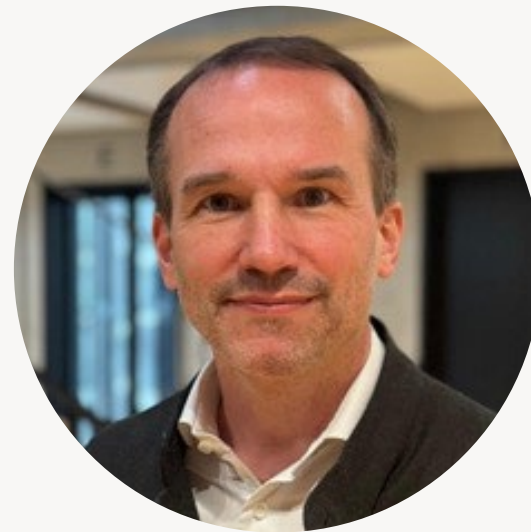
Source: 2026 BCG European Consumer Sentiment Survey (April 2026) with 20,093 total respondents across 11 countries; ~1,800 responses per country.

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
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