Official Statistics

Scottish Consumer Sentiment Indicator Quarter 2 2026 (April to June)

Release date: 29 July 2026

Key Points

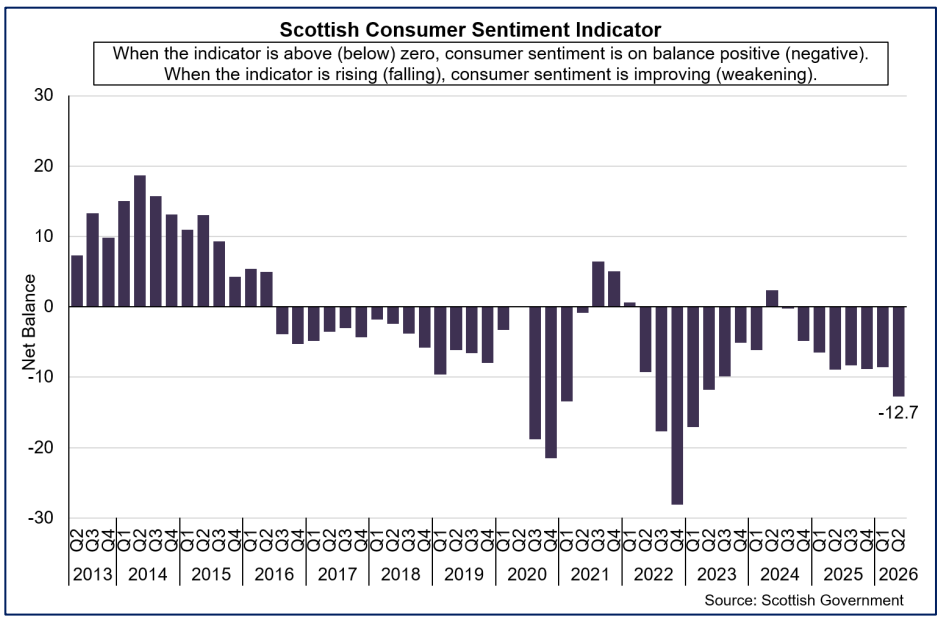
In Q2 2026, the Scottish Consumer Sentiment Indicator fell by 4.1 points over the quarter to -12.7, its lowest level since Q1 2023.

Over the year, consumer sentiment has weakened, with the indicator falling by 3.8 points compared to Q2 2025.

The consumer sentiment indicator is currently 10.1 points weaker than the quarterly series average of -2.6.[1]

Figure 1: The Scottish Consumer Sentiment Indicator fell by 4.1 points over the quarter to -12.7 in Q2 2026.

Consumer Sentiment, quarterly net balance, Q2 2013 to Q2 2026.



[1] The quarterly series average is from Q2 2013 to Q2 2026.

Introduction

The Scottish Consumer Sentiment Indicator is a composite measure of consumer sentiment in Scotland based on a quarterly survey of households' current sentiment and future expectations of: Scottish economic performance, security of households' financial position, and attitudes to spending money. Excel tables of the results are available online alongside the publication, and include a monthly breakdown of the results.

The latest survey for Q2 2026 was conducted online between 1 April and 30 June 2026, with a total sample size of 3,177 adults. The indicator represents the balance of respondents who report that consumer sentiment is positive/negative.

An Official Statistics Publication for Scotland

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More information about Scottish Government statistics is available on the Scottish Government website.

Results Breakdown

Composite Indicator

In Q2 2026, the Scottish Consumer Sentiment Indicator fell by 4.1 points to -12.7 indicating a weakening in sentiment over the quarter. The indicator is also lower than its average since Q2 2013 (-2.6).

All five of the sentiment sub indicators fell over the quarter, covering current and expected economic performance, current and expected household finances and current attitudes to spending.

The largest falls in sentiment were in the current economic performance and current attitudes to spending sub-indicators, which fell by 6.1 points and 6.5 points, respectively.

Figure 2: The weakening in the Consumer Sentiment Indicator in the second quarter of 2026 came from weakening in all five sub-indicators.

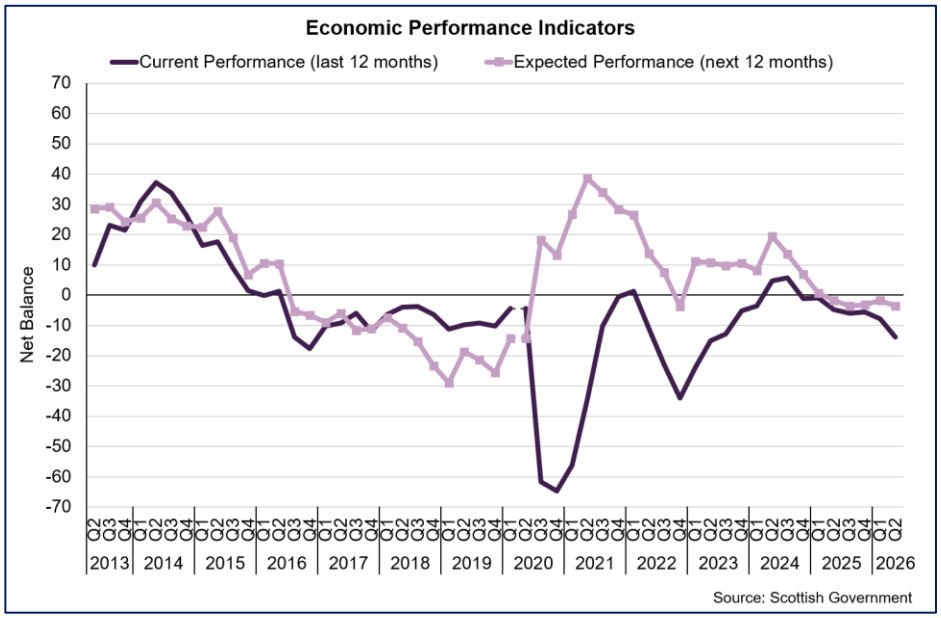
Results (Net Balances)	Latest Quarter (Q2 2026)	Previous Quarter (Q1 2026)	Change between Q1 and Q2 2026
Consumer Sentiment composite indicator	-12.7	-8.6	-4.1
Current indicators			
(a) Economy performance	-13.9	-7.7	-6.1
(c) Households' finances	-12.8	-9.6	-3.2
(e) Attitude to spending	-28.0	-21.5	-6.5
Expectation indicators			
(b) Economy performance - next 12 months	-3.5	-1.8	-1.7
(d) Households' finances - next 12 months	-5.3	-2.3	-3.0
Note: The consumer sentiment indicator score is the average of the net balances for each question topic. The net balance is the difference between the percentage of respondents reporting an improvement and those reporting a weakening. Scores are subject to rounding therefore differences in scores over the quarter may not sum.			

Economic Performance

The Economic Performance indicators reflect how respondents consider Scotland's economy is currently performing relative to 12 months earlier and how they expect it will be performing in 12 months' time relative to current performance.

Figure 3: Both current and expected economic performance indicators fell over the quarter.

Consumer Sentiment, economic performance indicators, quarterly net balance, Q2 2013 to Q2 2026.



The net balance of Scotland's current economic performance indicator in Q2 2026 was -13.9, implying that households, on balance, consider current economic performance to be weaker than 12 months ago. Current economic performance sentiment weakened over the quarter by 6.1 points and weakened over the year by 9.0 points compared to Q2 2025. The sub-indicator is at its lowest level since Q2 2023.

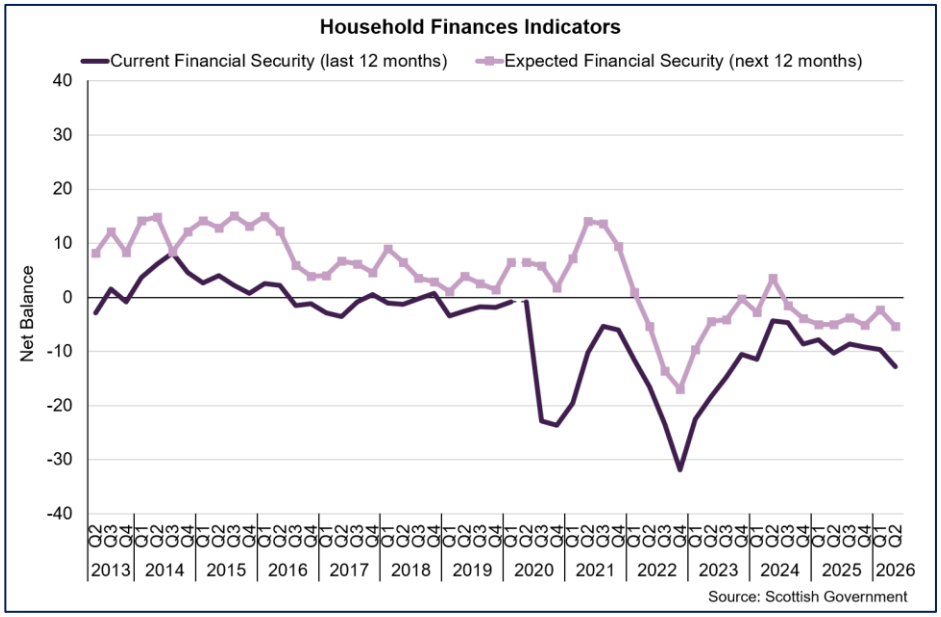
The net balance of Scotland's expected economic performance indicator was -3.5, implying that households, on balance, expect economic performance to weaken over the next 12 months. Expected economic performance sentiment weakened by 1.7 points over the quarter, and weakened over the year by 1.9 points compared to Q2 2025. The sub-indicator is at its lowest level since Q3 2025.

Household Finances

The Household Finances indicators reflect how secure respondents consider their current household financial position to be relative to 12 months earlier and how secure they expect it to be in 12 months' time relative to its current position.

Figure 4: Both the current and expected households' finances indicators fell over the quarter.

Consumer Sentiment, household finances indicators, quarterly net balance, Q2 2013 to Q2 2026.



The net balance of the current household financial security indicator was -12.8 in Q2 2026, implying that households, on balance, consider their current financial conditions to be less secure than 12 months ago. Sentiment on current household financial security weakened by 3.2 points over the quarter and weakened by 2.5 points over the year compared to Q2 2025. The sub-indicator is at its lowest level since Q3 2023.

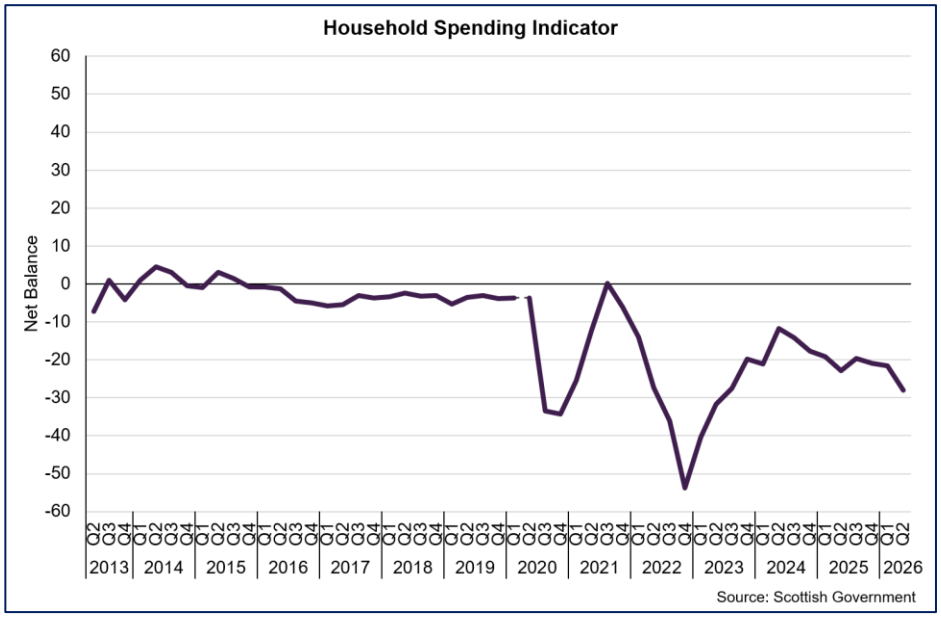
The net balance of the expected household financial security indicator was -5.3 in Q2 2026, implying that households, on balance, expect their future household finances will become less secure over the next 12 months. Sentiment on expected household financial security weakened by 3.0 points over the quarter and weakened by 0.3 points over the year compared to Q2 2025. The sub-indicator is at its lowest level since Q1 2023.

Household Spending

The Household Spending indicator reflects how relaxed respondents currently feel about spending money relative to 12 months earlier.

Figure 5: The attitudes to spending indicator fell over the quarter.

Consumer Sentiment, attitudes to spending indicator, quarterly net balance, Q2 2013 to Q2 2026.



The net balance of the current attitudes to spending indicator was -28.0 in Q2 2026, implying that households, on balance, feel less relaxed about spending money than 12 months ago. Attitudes to spending sentiment weakened by 6.5 points over the quarter and weakened by 5.2 points over the year compared to Q2 2025. The sub-indicator is at its lowest level since Q2 2023.

Data and Methodology

Overview

The Scottish Consumer Sentiment Indicator has been compiled quarterly since Q2 2013, initially based on a face-to-face survey of approximately 2,250 adults in Scotland. As a result of the coronavirus pandemic, the consumer sentiment survey was paused in March 2020 and restarted as an online survey in June 2020 with a quarterly sample of c. 3,000 adults in Scotland. This data can be viewed and compared as far back as Q2 2013 and, on a monthly basis since April 2019.[2]

Data sources and quality

The Consumer Sentiment Survey asks respondents questions to ascertain whether sentiment has improved, declined or remained unchanged across 5 indicators:

a. Current Scottish economic performance over the past 12 months;
b. Expected Scottish economic performance over the next 12 months;
c. Current security of households' financial position over the past 12 months;
d. Expected security of households' financial position over the next 12 months;
e. Current attitude to spending money over the past 12 months.

Estimates, across these indicators, are based on a randomly selected representative sample of around 3,000 YouGov online panel members aged 16+ in Scotland every quarter, with around 1,000 responses gathered every month. The data are weighted to be a representative sample of the Scottish population as a whole with respect to age, gender, sex, region and socioeconomic grade. All results are based on a sample and are therefore subject to statistical errors normally associated with sample-based information, however all results reported are considered to be of sufficient quality.

Data Processing and Quality Assurance

Indicator scores for each question are presented in the form of net balances. The net balances are calculated by subtracting the percentage of respondents that report a decline in sentiment from the percentage of respondents that report an improvement in sentiment, excluding respondents that report unchanged

[2] Due to the coronavirus pandemic, data were not collected in the last two weeks of March 2020 and in April and May 2020. Therefore there are no results for Q2 2020 as a whole and in Q1 2020 results are based on 2,129 adults instead of 2,250.

sentiment. In each quarter this shows whether the balance of responses is positive, negative or balanced. From this, the composite Consumer Sentiment Indicator score is derived as the average of the net balances for each of the five sub-indicators.

On a quarterly and monthly basis, the distribution of responses to questions and the net balances provides a snapshot of consumer sentiment. The change in net balances between time periods can also show whether sentiment is improving or weakening. Taken together, the latest net balance scores, and the change compared to previous periods, provide an early signal of potential changes in household spending, a key component of Scottish GDP.

Anonymised raw data are received in Scottish Government for analysis. After statistical processing, quality assurance is undertaken to ensure processing meets the required accuracy. This involves internal checks using two separate methodologies to process the data, conducted by at least two different analysts.

Relevance and Coherence

The Scottish Consumer Sentiment Indicator (SCSI) is a key indicator for tracking the performance of the Scottish economy. Estimates are published around four weeks after the end of the month or quarter when data are collected. The SCSI provides insights on consumer sentiment in Scotland in advance of a wider range of accredited official and official statistics relating to business insights and economic performance such as GDP or Labour Market statistics.

Insights on the sentiment of households is an important aspect of understanding economic conditions in Scotland. SG Quarterly National Accounts estimate household final consumption expenditure (measuring how much money people in households spend on a range of commodities) makes up around 62 per cent of Scottish GDP.

The SCSI provides an understanding of the sentiment of consumers in the economy. This survey is for Scotland only, however can be used alongside similar indicators at a UK level (such as GfK UK Consumer Sentiment) Global - NIQ to illustrate the economic and financial conditions facing households.

Accessibility

The Scottish Consumer Sentiment Indicator is released as a statistical bulletin every calendar quarter alongside quarterly publication tables. Excel tables are also updated every month. These are all available on the Scottish Government website

at the following link Economy statistics - gov.scot. Publication tables include data on the five sub-indicators of sentiment and report the distribution of respondents reporting better, worse, or the same level of sentiment for each sub-indicator.

Key findings are also widely disseminated through regular Chief Economist Publications including in the Scottish Economic Bulletin and Scottish Economic Insights publications. These are published at the following link Economic briefs and bulletins - gov.scot

Related links

GDP Monthly Estimate, May 2026: Economy statistics - gov.scot
Bulletin Release 29 July 2026
Gross Domestic Product (GDP) statistics measure changes in the output of the economy. This is an official Statistics in Development publication for Scotland

Scottish Economic Bulletin Report, July 2026: Economic briefs and bulletins - gov.scot
Bulletin Release 3 July 2026
Provides a summary of latest key economic statistics, forecasts and analysis on the Scottish economy.

Other relevant statistics can be found at

Economy statistics - gov.scot

Economic briefs and bulletins - gov.scot

Business and innovation statistics - gov.scot

Background Information

The following supporting documents have been published:

- Excel tables of results, including monthly data.

The Scottish Consumer Sentiment Indicator also features in the Monthly Economic Bulletin and the Scottish Economic Insights report. Links to the latest versions of these publications can be found and accessed at: Economic briefs and bulletins - gov.scot (www.gov.scot)

Next publications

The next quarterly publication of the Scottish Consumer Sentiment Indicator is due in October 2026. Updates to the monthly data will also be released before this in August and September 2026.

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We are always interested to hear from our users about how our statistics are used, and how they can be improved.

Feedback survey

We'd appreciate it if you would complete our short feedback survey on this publication.

Enquiries

For enquiries about this publication please contact:
Office of the Chief Economic Adviser
E-mail: economic.statistics@gov.scot

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