



2026

How Advertisers Should Prepare For Holiday 2026



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The holidays are all about connection — bringing together family, friends, and communities — and now the shopping experience is more connected than ever, too. Traditional store visits and handwritten lists have given way to an environment in which consumers **are browsing and buying across more channels, influencer-driven discovery platforms, times, and AI-powered experiences.**

They may be rushing home with their treasures, as the popular holiday carol goes, but today's shopping trip is decidedly different. The treasures are likely purchased at a variety of retail locations, while delivery has changed some routes from the mall to the front door.

Shifting behaviors — confirmed and explored by industry leaders during the recent [Cannes Lions event](#) — are compelling marketers to rethink how they plan, measure, and optimize marketing effectiveness throughout the year and especially during the busiest shopping times. Although the operating environment may be more competitive, it opens up new opportunities to forge and maintain all-important connections with consumers.

Ahead of every holiday season, brands look for ways to win. Businesses that succeed during the crucial commerce weeks in 2026 will recognize demand where and when it starts, activate across linked commerce environments, and measure outcomes across the complete customer journey.

Last Year's Shifts Set to Define the Upcoming Holiday Season

As economic conditions remain uncertain — and have actually compounded **due to pressures** such as energy costs and global volatility — consumers are likely to continue habits from last year, which grew 2% in dollars and had **flat unit demand**.



Holiday head start: To stretch their stressed budgets, many people began holiday shopping earlier in 2025. Circana data indicates that nearly one-half (48%) of consumers browsed before Thanksgiving, and the number of people who shifted shopping to early November increased three percentage points from the prior year. Overall, 44% planned to shop earlier.

Insights from Circana's partners confirm such behaviors. The Trade Desk found that nearly two in five Americans started researching purchases before Black Friday and 38% went on to buy during the early window.



Social media acceleration: Circana insights from the 2025 holiday period show that consumers got ideas and inspiration from social media platforms including TikTok, YouTube, and Instagram, among others.



Omnichannel expectations: Shopping for the season is everywhere, literally and figuratively. Circana's data shows that 81% of consumers shopped online during the 2025 holiday period. Nearly one-half (47%) used their smartphone to browse and buy items on their list or perhaps not on their list. In this era that includes visits to brick-and-mortar locations and immediate access to digital storefronts, the distance between "I want that" and "I bought that" is often reduced to a simple press of the thumb.

The overarching takeaway is that consumers are shopping — and shopping earlier — across an increasingly connected commerce ecosystem. Marketers can use last year's results to plan and execute relevant programs for this year, from scenario planning to ensure proper inventory levels to identifying relevant creator partners to targeting consumers at the right moments on their holiday spree.

Source: Circana, *Annual Holiday Survey, October 2025*, cited in Circana's 2025 U.S. Holiday Purchase Intentions report. The Trade Desk, "Holiday Shopping Data 2026: Success," <https://www.thetradedesk.com/insights/holiday-shopping-data-2026-success>

Five Trends Set to Shape Holiday 2026

Last year's patterns set the stage. The trends below reveal where holiday commerce is heading now and how marketers should position themselves to compete.

1 | Festive feeds

It wasn't that long ago when people camped out in front of stores for Black Friday deals and swarmed malls en masse. In 2026, the shopping journey no longer begins in the store aisle or a search bar, but with a social feed. Consumers scroll, watch, and save long before they ever intend to buy, and this reordering of behavior has permanently altered where demand originates.

Circana data confirms the movement:

- **A majority (50.1%) of social media users are also expected to be social buyers**, meaning that most people discover and transact within the same environment.
- **TikTok Shop has scaled to an estimated \$6.5 billion in U.S. sales**, turning entertainment into a direct path to purchase. Circana estimates that TikTok Shop alone has influenced about 1% of total U.S. retail sales and 3% of e-commerce sales in a short period of time.

Circana partner Meta reports similar behaviors. The social technology company finds that 86% of holiday shoppers use social media for inspiration, and 72% use it specifically to get ideas on what to buy.



For this upcoming holiday period, brands that treat discovery as a distinct, fundable priority will capture attention before competitors even enter the consideration set.

2 | Influencers as inspiration

In this era of social commerce, many shoppers are following people, not brands, another shift that impacts traditional holiday marketing plans. Circana's data shows that the influencer economy has grown into a \$31 billion market, with creators functioning as both a media channel and a trusted recommendation engine.

There's a lot of runway for additional growth, as 92% of Gen Z shoppers are more likely to purchase because of influencer impact.

3 | Earlier demand signals

For decades, a sales report was the primary indicator of demand. That's not enough in today's omnichannel market because by the time a transaction has registered, the moment to influence it has passed. Those moments are crucial during make-or-break periods like the holidays.

Brands and retailers can detect holiday demand earlier in a variety of ways, starting from late summer:



Engagement patterns that reveal intent, including saves, shares, and comments.



Influencer content that lays the groundwork for interest weeks ahead of purchase.



Social commerce activity that signals category momentum in real time.



AI-assisted queries that expose what consumers are researching.



Retail media performance that surfaces early conversion behavior.

Taken together, these signals allow brands to focus on business outcomes rather than channels. Measurement becomes a planning tool that can be used to allocate holiday investment before the season peaks, not when it starts to fade.

Sources: EMARKETER, U.S. Social Commerce Forecast 2026; Circana, Social Commerce; EMARKETER Forecast, February 2026; Circana ShopperSights U.S.; 2025 Meta Global Holiday Shopping Study, Meta Shoppers

Five Trends Set to Shape Holiday 2026

4 | AI as a shopping companion

AI has moved from novelty to utility in the shopping journey.

For example, Circana data shows that 25% of consumers reported that they used AI recommendations to purchase a CPG product.



Especially during busy holiday weeks with events, travel, and errands, more consumers are using AI to compare products, generate gift ideas, summarize reviews, and shortlist options. In essence, shoppers are delegating the early stages of discovery to a digital assistant.

It's important to note that AI isn't replacing shopping, but reshaping discovery. As assistants filter and rank options, visibility depends on machine-readable relevance rather than shelf placement alone. For 2026, marketers' holiday preparations now include AI readiness. Brands that structure their content and product data for AI discoverability set themselves up for more recommendations.

Meanwhile, in what's shaping up to be an agentic commerce world, data quality is not only crucial but existential. Agentic systems can actually exacerbate data problems, leading to a host of potential issues for brands, retailers, and consumers.

Source: Circana Shopper Survey, March 2026; Circana ShopperSights U.S.

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5 | Younger consumers on a mission

Gen Z and younger millennials get a lot of attention in the omnichannel environment and for good reason. Although all generations are participating in shifts to some degree, Circana's ShopperSights data confirms that these cohorts are reshaping holiday buying:

- **Gen Z** and millennials are significantly more likely than older generations to shop on Thanksgiving Day.
- **28.5% of Gen Z** plan to shop on Black Friday and **26.6% of millennials** plan to shop on Black Friday.
- **18.1% of Gen Z** expect to split Black Friday shopping evenly between stores and online.
- **These consumers also have shown a penchant for shopping multiple days:** 12.7% of Gen Z and 12.9% of millennials are likely to browse for more than one day, compared to 8.1% of those in other generations.
- **Gen Z and millennials** over-index on both exclusively in-store shopping and mostly in-store shopping.

Shoppers within these age groups are:

- **Leading adoption of social commerce**, treating discovery and purchase as one seamless act.
- **Powering the creator economy**, placing greater trust in individuals than in traditional advertising.
- **Embracing AI-assisted shopping** as a default rather than an experiment.
- **Clustering among urban shoppers**, where connected retail environments are densest.

Brands that build for the expectations of consumers in these generations are building for the entire market's future expectations.

Industry Leaders Weigh In on Shifting Behaviors

It may have been six months before the peak holiday season, but industry leaders at the Cannes Lions event this summer addressed market challenges and opportunities from different vantage points. These approaches apply to the all-important fourth quarter stretch.

Google POV

Google

The industry is segueing from correlation to causal measurement. [Google leaders](#) emphasized that knowing that two things happened together is not the same as knowing one caused the other. In addition, measurement interoperability — the challenge of comparing results across different measurement systems — is an obstacle that marketers need to solve if unified measurement is going to mean anything in practice.



L'Oréal POV

L'ORÉAL

As the company faces the challenge of balancing marketing effectiveness across 50 global brands simultaneously, measuring creative as a genuine driver of return is crucial. [L'Oréal](#) also recognizes that the most durable results come from investments that serve both the season and the years beyond it.



Walmart Connect POV

Walmart

[Walmart Connect](#) focuses on building methodologies that allow results to be evaluated across channels on a consistent basis. Incrementality ultimately enables this retail organization and its brand partners to understand what drove a sale and lifted business results. Measurement is really about looking forward.

CVS Media Exchange POV

CVS Media Exchange

[CVS Media Exchange](#) adheres to the belief that the fragmentation of media creates the fragmentation of measurement. As touch points multiply, a unified view becomes essential rather than optional. At the same time, in-store experiences are as crucial as online discovery for CVS: About 94% of customers who enter a CVS Pharmacy store leave with a purchase, and the physical store is still where most transactions close.

While each company leader approached the challenge from a different perspective, they all pointed to consistent conclusions: Causal methods are becoming the standard, platform self-reporting is not enough, incrementality is the clearest test, and short- and long-term measurement must coexist. As consumer journeys become more connected, marketers at these and other organizations are taking a fresh and needed look at how they plan, activate, and measure holiday marketing.

Source: Circana interviews at Cannes Lions 2026. Check out more at <https://www.circana.com/insights-hub/circana-at-cannes-lions-2026>

Holiday Insights from Circana Partners

∞ Meta

95%



of shoppers will shop promotional sales events.

86%



of holiday shoppers use social media for inspiration.

Partner Spotlight: Meta

The 2026 holiday season kicks off in early October. 49% of shoppers plan to spend more than last year, 95% will shop promotional sales events, and 46% will do most of their holiday buying inside promotional windows that now run from the October warm-up sales through Black Friday and into the new year. And they're completing the entire journey in one place. 86% of holiday shoppers use social media for inspiration, ahead of online retailers at 44%. 63% use it to confirm a brand they're already considering. 56% say it moved them to buy sooner, and 68% of shoppers who discover a product on Facebook are likely to purchase.

The efficiency follows: in North America, median advertiser CPA dips up to 15% for retail during Black Friday.

[Visit the Meta Holiday Insights Center](#) for more information.



Source: 2025 Meta Global Holiday Shopping Study, Meta Shoppers Filter, n=4,669; Meta internal analysis, median advertiser CPA on purchase-optimization campaigns, February 2023–February 2026.

Holiday Insights from Circana Partners



Americans started researching purchases before Black Friday.

62% 

shopped online outside of Amazon and social platforms.

87% 

of shoppers said ads influenced their research and purchase decisions.

Partner Spotlight: The Trade Desk

Holiday shopping began earlier in 2025 and shoppers made decisions with more intention than in years past. Nearly two in five Americans started researching purchases before Black Friday. This tells us that brands who show up before the rush have a longer runway to build consideration.

Value shaped a lot of what people bought. Shoppers favored everyday, practical purchases over luxury items. Clothing led the gift list, with 54% of shoppers buying in that category. Deal-seeking stayed strong throughout the season too, with roughly 3 in 10 shoppers actively hunting for discounts.

Where shoppers spent their time tells its own story. 62% shopped online outside of Amazon and social platforms. Gift-givers overall spent a comparable share of their media time away from social apps, gravitating instead toward connected TV, streaming music, gaming, and editorial content. Q4 spend for CPG/electronics advertisers reflects that shift. CTV accounted for 41% of holiday channel mix this season. Mobile display followed at 23% and native video at 15%.

Advertising played a role in the decisions that followed. This was confirmed by 87% of shoppers surveyed who said ads influenced their research and purchase decisions, and 30% pointed to CTV specifically as part of that process. Advertisers planning for this season should get in front of shoppers early, lead with value in their messaging, and stay present on the channels where people are spending their time and attention this holiday.



Source: The Trade Desk, "Holiday Shopping Data 2026: Success,"
<https://www.thetradedesk.com/insights/holiday-shopping-data-2026-success>

Holiday Insights from Circana Partners

Snapchat

Partner Spotlight: Snapchat

Holiday shopping thrives among Snapchatters, as they use the platform for their entire path to purchase – from discovery and recommendations to gift planning and spending.

According to recent research from Snapchat, Snapchatters explore a range of gifting categories, but sweets, food, drinks, and beauty products are top areas of interest. With 76% of daily Snapchatters seeing the holiday season as one long, continuous celebration with multiple exciting moments rather than a single event, holidays is no longer just one big day for brands, but it's about being present in a series of small purchase moments along the way.

Recommendations from the inner circle are especially influential, as 67% use Snapchat to chat with friends and family about gift ideas during Q4 and 59% of Snapchatters have shared or received a product/brand recommendation from friends or family on the platform. Augmented reality (AR) lenses also presents a strong opportunity for advertisers to connect with consumers in fun and engaging way, as AR lenses is the #1 type of holiday-related content Snapchatters most prefer to see from brands or creators.

67%

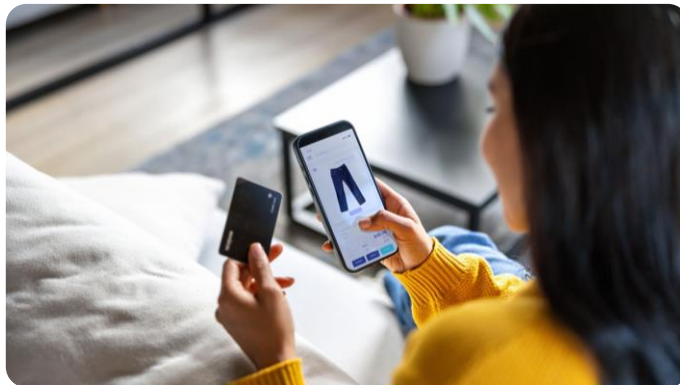


of Snapchatters use Snapchat to chat with friends and family about gift ideas during Q4.

59%



have shared or received a product or brand recommendation from friends or family on Snapchat.



Source: Snapchat research, 2026
Snapchat case study

Holiday Insights from Circana Partners

reddit



ALMOST 2 IN 3 holiday shoppers used AI tools while shopping.

HOW SHOPPERS USED AI

Product research.

62%

Price comparisons

52%

Deals & promotions

41%

Partner Spotlight:

Reddit

At the center of the new consumer decision journey, Reddit powers trusted recommendations. Two in three Reddit users check Reddit to verify AI-generated gift recommendations with real people before purchasing.

Reddit conversations drive confidence and higher holiday spending. Over one in two Reddit users spent more than \$1,000 on holiday-related purchases last season, and 40% plan to spend more money this holiday season.

This season, holiday shoppers welcome brands that engage on Reddit. 68% of Reddit users agree that seeing an ad on Reddit makes them more likely to buy that brand or product as a holiday gift, and 74% of Reddit users are interested in seeing brands actively engage in holiday shopping conversations on Reddit.

Holiday shopping starts early and builds momentum. Shopping conversations begin building in July and accelerate through fall as people research, plan, and prepare. By early November, activity has grown nearly 10x, peaking around Black Friday and Cyber Monday.

Boost performance with proven strategies. Run takeovers during peak moments, increase your creative variety to avoid creative fatigue, and utilize a mix of formats on Reddit to maximize impact and reach redditors across visually distinct formats.



Source: Reddit, United States, "Let's talk about Holidays Gifts & Social Media", n=1,000, A18+, monthly social media users (including Reddit), Attest panels, February 2026

From Insight to Action: Circana's Holiday Readiness Playbook

Data is most valuable when it drives action. The following recommendations translate holiday trends into a practical framework for the selling season that runs from November through early January.

1 | Build discovery into your holiday strategy

Think beyond search. Discovery now begins in feeds and communities, so marketers should invest deliberately in creators, social commerce, and retail media. Treat these channels as demand generators, not afterthoughts, and fund them as core holiday infrastructure.

3 | Prepare for AI-assisted shopping

AI readiness is now holiday readiness. Ensure your product data is structured, your content is consistent across touch points, and your catalog is optimized for AI discoverability. Establish agentic readiness so your products can be surfaced, understood, and recommended by the assistants consumers increasingly rely on.



2 | Recognize demand before purchase

Stop waiting for the backward-looking sales report. Monitor engagement, creator activity, AI-assisted queries, and search behavior as leading indicators. Reading these signals early lets you act while there is still time to influence the outcome.

By reading signals early, you can advertise before the traditional ad-heavy period. That ensures that your brand has less overall media competition to grab consumers' attention and also ensures that your brand has a starting level of salience.

4 | Measure business outcomes, not channel performance

Individual channel metrics obscure more than they reveal. Bring together retail media, AI, e-commerce, in-store, and creators through connected measurement, and evaluate performance against genuine business outcomes. This is how brands prove impact and reallocate investment with confidence.

On another level, investments in custom measurement can help retailers not only understand holiday plan impacts but also inform retail media upfronts. This can help secure premium, high-demand placements.

Turn Holiday Insights Into Lasting Growth



"Ask your media network if they can measure beyond their own four walls. Total market measurement is critical to understand the true impact of your media, especially during holiday season when cross-retailer shopping behavior increases."

Moody Khan

VP, RMN Measurement Strategy, Circana

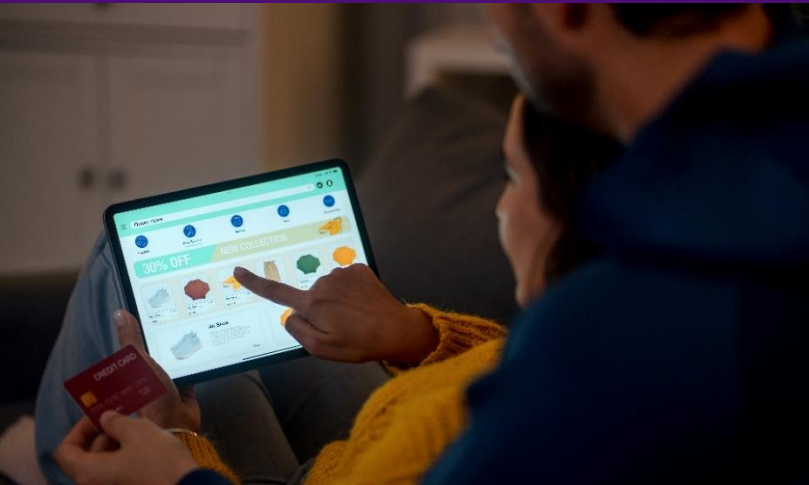
These recommendations reflect a broader market reality. Global ad spending is expected to exceed \$1 trillion, and retail media is set to be 2026's fastest-growing global channel. In an environment this large and this fragmented, disciplined measurement is not a luxury. It is the prerequisite for growth.



"In competitive categories, decide your peak season and how early to lead in with media – usually two to four weeks of buildup."

Jonathan Dizney

VP, Global Measurement Media Consulting, Circana



The path to a winning 2026 holiday

This year's holiday season will be won by brands that recognize demand early, activate across connected commerce environments, and use connected measurement to make forward-looking decisions before consumers ever reach the point of purchase. These priorities will serve marketers well into the new year and, eventually, into 2027 holiday efforts.



Source: EMARKETER Trends, Forecasts & Statistics, December 2025

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Revisit Your Holiday Media Plans

Shopper behaviors are shifting in ways that can affect plans built during upfront and annual planning cycles. Circana's measurement consultants can review your holiday plans to identify where you have room to adjust.



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About Circana

Circana is a leader in providing technology, AI, and data to fast-moving consumer packaged goods companies, durables manufacturers, and retailers seeking to optimize their businesses. Circana's predictive analytics and technology empower clients to measure their market share, understand the underlying consumer behavior driving it, and accelerate their growth. Circana's Liquid Data® technology platform is powered by an expansive, high-quality data set, and intelligent algorithms trained on six decades of domain expertise. With Circana, clients can take immediate action to future-proof and evolve their growth strategies amid an increasingly complex, fast-paced, and ever-changing economy.

For more information, visit circana.com.