



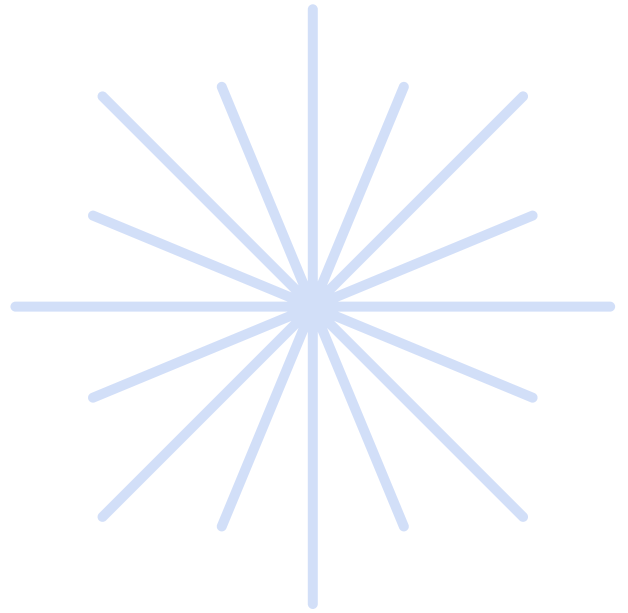
2026

Winter Holidays Shopping Trends

How US consumers will shop, celebrate,
and decide this holiday season.

Basis[®]

Basis ImpactIQ x GWI Custom Research Study US Consumers (n=2,006), Fielded May 2026

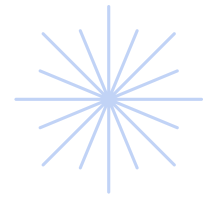


ABOUT THIS RESEARCH

A proprietary read on how 2,000+ US consumers celebrated in 2025 and how they plan to shop and celebrate in 2026.



- Basis ImpactIQ x GWI proprietary survey of US consumers (n=2,006)
- Fielded May 2026
- Captures 2025 holiday behavior and 2026 shopping and celebration intent
- Nationally representative; weighted to the US population



EXECUTIVE SUMMARY

Five shifts defining the 2026 holiday shopping season, and what they mean for brands.

1. Deals are validation.

Price signals help shoppers justify purchases and buy with confidence, so promotions now shape the decision itself, well beyond driving volume.

2. Meaning and money, together.

Consumers want gifts that feel meaningful and smart. Value is no longer about price alone, and brands that frame it as both will prevail.

3. Shopping is a system.

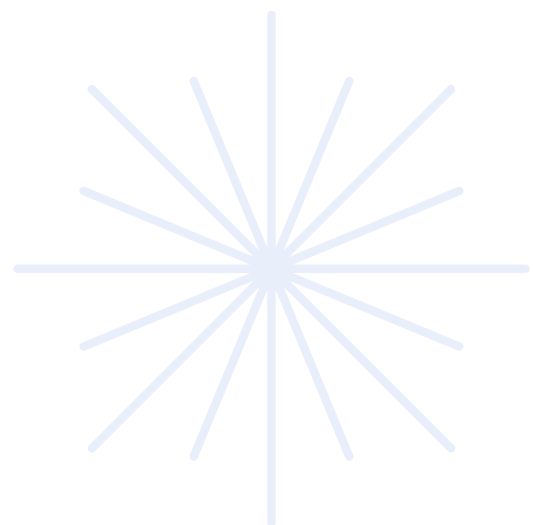
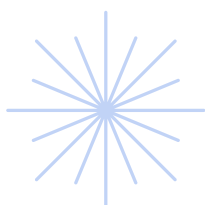
The season is a long, distributed decision journey, and influence builds across months, well beyond one peak weekend.

4. Digital defines consideration.

71% are using digital tools (search, social, and AI) to find gift ideas. Preferences form before consumers reach a brand.

5. AI assists, but it doesn't decide.

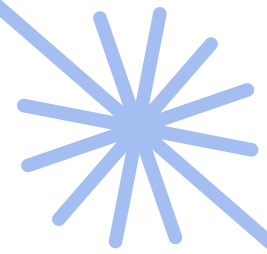
Adoption is rising, and consumers want help comparing and discovering while still handling checkout themselves. Make sure you are visible throughout that journey.





Holiday Meaning & Celebration

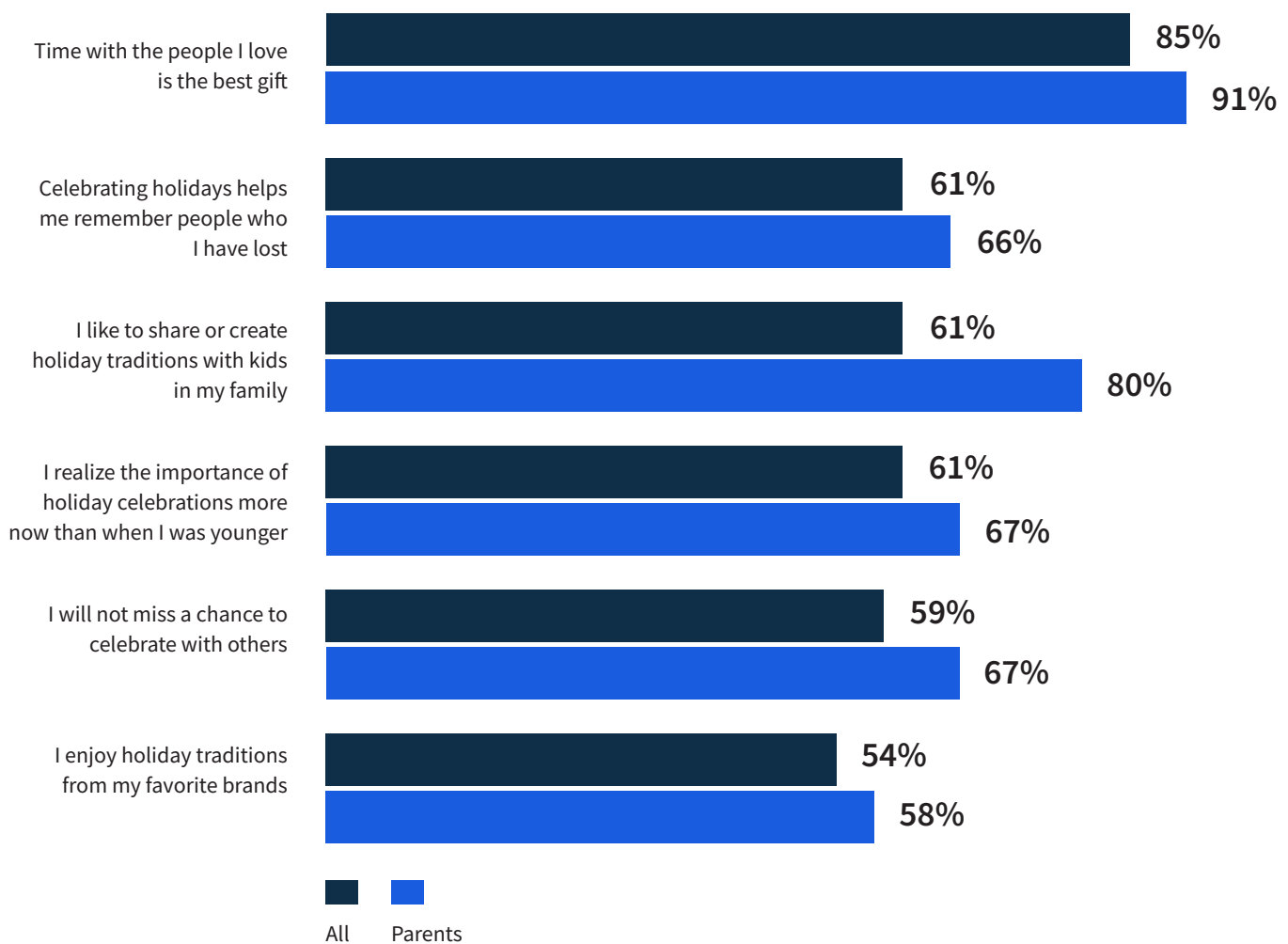
Why people celebrate, and the emotional stakes behind every brand interaction.



Connection drives the holidays

For consumers, the holiday season is a ritual. It is a time to reinforce relationships and shared traditions. That emotional weight raises the stakes, and messaging that misreads the moment gets rejected. Parents feel it most of all, over-indexing on connection and tradition and anchoring how families experience the season.

Holiday & Tradition Attitudes



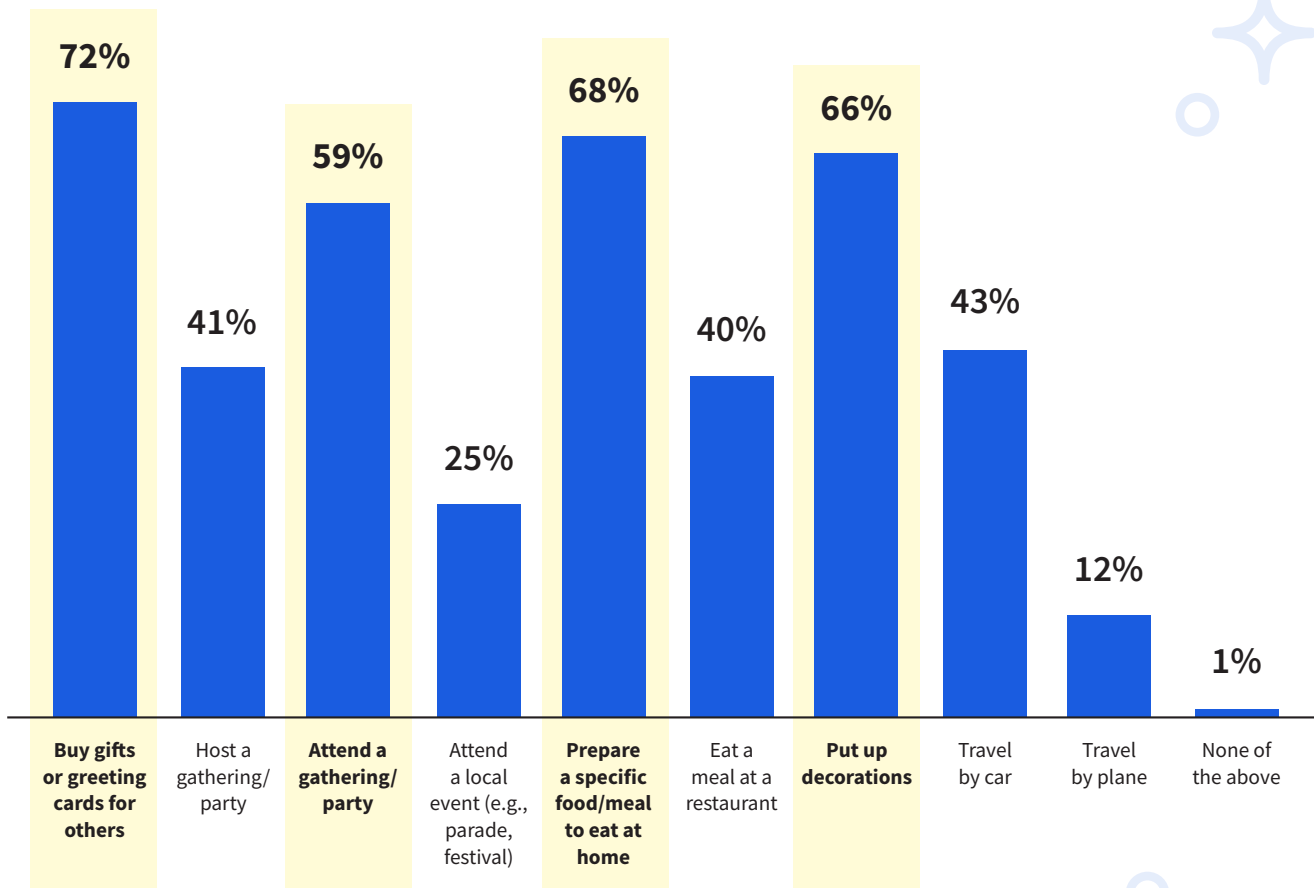
THE LESSON FOR BRANDS

Earn a place in the ritual. Generic or purely transactional messaging won't land, least of all with families.

Consumers celebrate in familiar, consistent ways each year

The meaning of the holidays varies, but the behaviors don't. Gift giving, gathering, decorating, and shared meals define the season year after year. That predictability hands brands across categories a clear set of repeatable moments to plan around.

How Consumers Plan to Celebrate in 2026



THE LESSON FOR BRANDS

Map your calendar to these recurring rituals and show up where consumers already are.



Gift & Spending

Meaning beats practicality—even on a budget

Even in a tighter economy, consumers aren't abandoning the emotional facets of gifting. They're balancing meaning with practicality, and income shapes the balance. Higher earners lean toward meaningful, personal gifts (62% name it their top goal), while lower earners lean toward staying on budget (26%).

The balance, by the numbers:

70%

of gift givers are at least somewhat **excited** for 2026 holiday gift shopping

Low HHI: 69%

Mid HHI: 71%

High HHI: 70%

54%

of gift givers' primary 2026 gifting goal is to find something **meaningful/personal**

Low HHI: 46%

Mid HHI: 52%

High HHI: 62%

18%

of gift givers' primary 2026 gifting goal is to stay within **budget**

Low HHI: 26%

Mid HHI: 20%

High HHI: 10%



72% of US adults are planning to purchase gifts in the 2026 winter holiday season



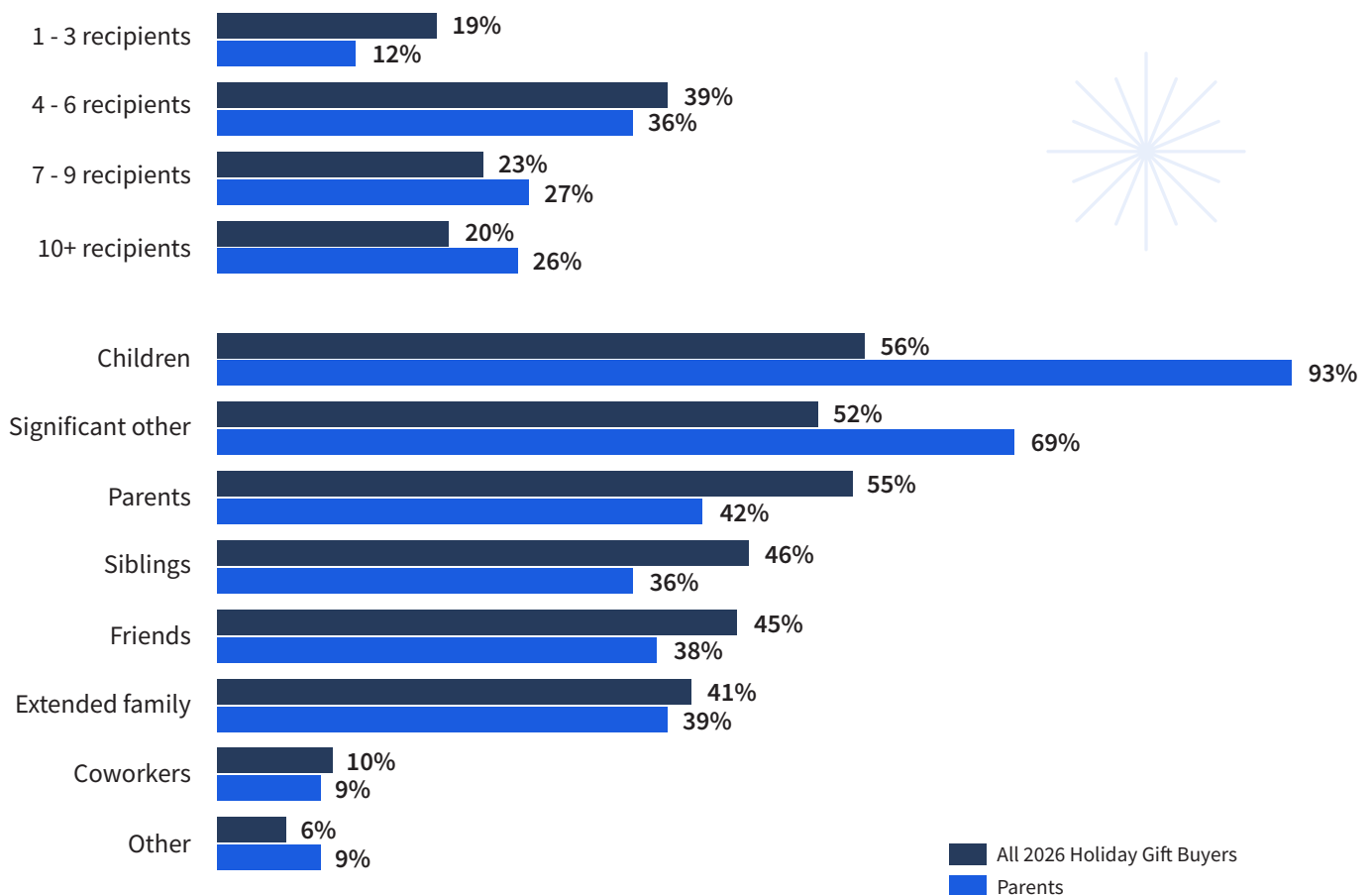
THE LESSON FOR BRANDS

Meet shoppers across the spectrum, with options that feel thoughtful and relevant at a range of price points.

Big gifting lists make the season complex

Holiday shopping is a tangled web of recipients, preferences, and budgets. The longer the list, the more planning and trade-offs required. Parents shop the widest networks, especially children and immediate family, making them a prime source of both demand and decision friction.

Number & Type of Gift Recipients Consumers Will Shop For



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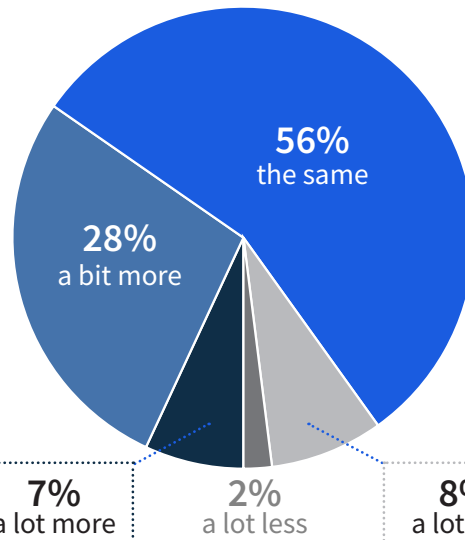
Reduce friction. Tools that simplify multi-recipient shopping (lists, bundles, recommendations) win the bigger baskets.

Spending holds—but scrutiny is rising

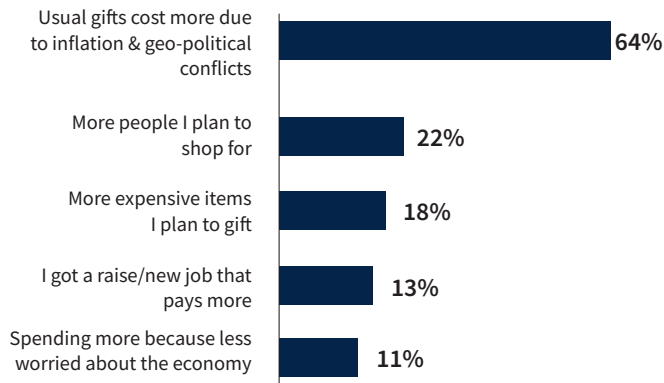
Consumers aren't pulling back from the season...but they are examining it. Most plan to spend the same or more, but economic pressure is pushing them toward more deliberate decisions. Every dollar now faces more competition and more comparison.

2026 Gift Spending Outlook Compared to 2025 Gift Spending

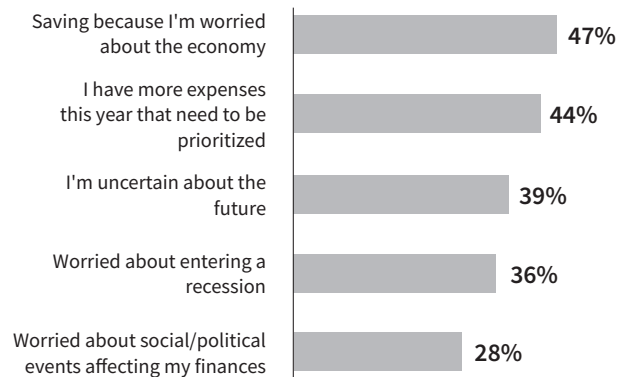
I expect to spend...



Leading Reasons for Expecting to Spend More:



Leading Reasons for Expecting to Spend Less:



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Earn the purchase on both fronts: emotional value and financial value.



Uncertainty is rewriting how, and when, people shop

External pressure is leading to shrinking budgets and shifting behavior. Rather than react in the moment, consumers are getting strategic, rethinking when they shop, where they shop, and how they judge value. The result: earlier purchases, harder deal-hunting, and more openness to alternative retailers.

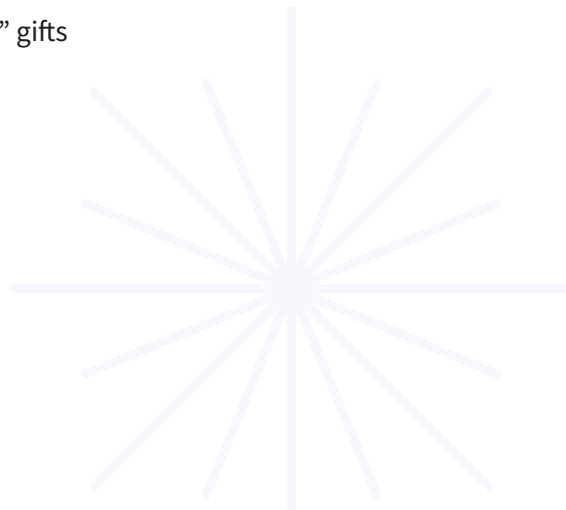
Nearly half of consumers have changed their outlook on holiday shopping

Among those anticipating change:

- 57%** Hunt for deals more actively
- 33%** Set a stricter budget
- 32%** Wait to see if prices improve
- 26%** Start shopping earlier
- 26%** Spend less overall
- 25%** Spread spending over time
- 21%** Choose practical, “evergreen” gifts
- 20%** Buy fewer gifts



45% of gift buyers say political and geopolitical change has shifted their holiday outlook.



THE LESSON FOR BRANDS

Assume a moving target. Shoppers reassess continuously, and the decision never fully settles.

Shoppers hunt for deals—they don't wait for them

Value-seeking is active and constant. Under pressure, price, discounts, and shipping become front-of-mind signals consumers use to judge a purchase well before checkout.



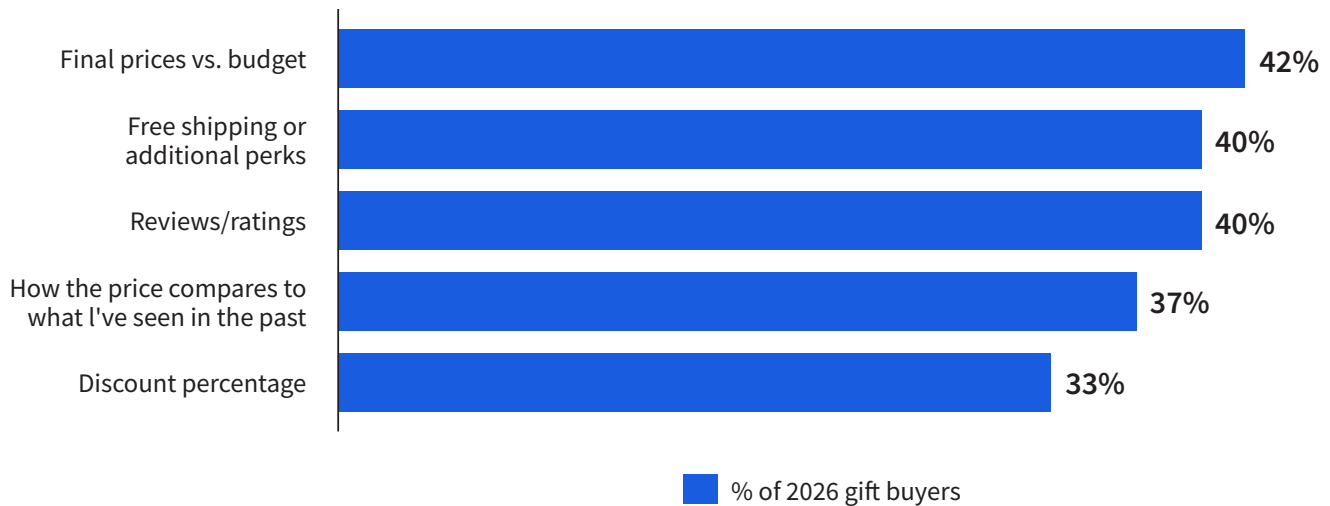
26% of all gift buyers plan to seek out more deals this year



Among those feeling the impact of current events, that jumps to 57%

Holiday Deal Evaluation

How do you determine whether a holiday deal is worth purchasing?



THE LESSON FOR BRANDS

Compete on visible value. Surface deals and shipping perks early and often, so you're in the running when the hunt begins.



Shopping Timelines & Behaviors

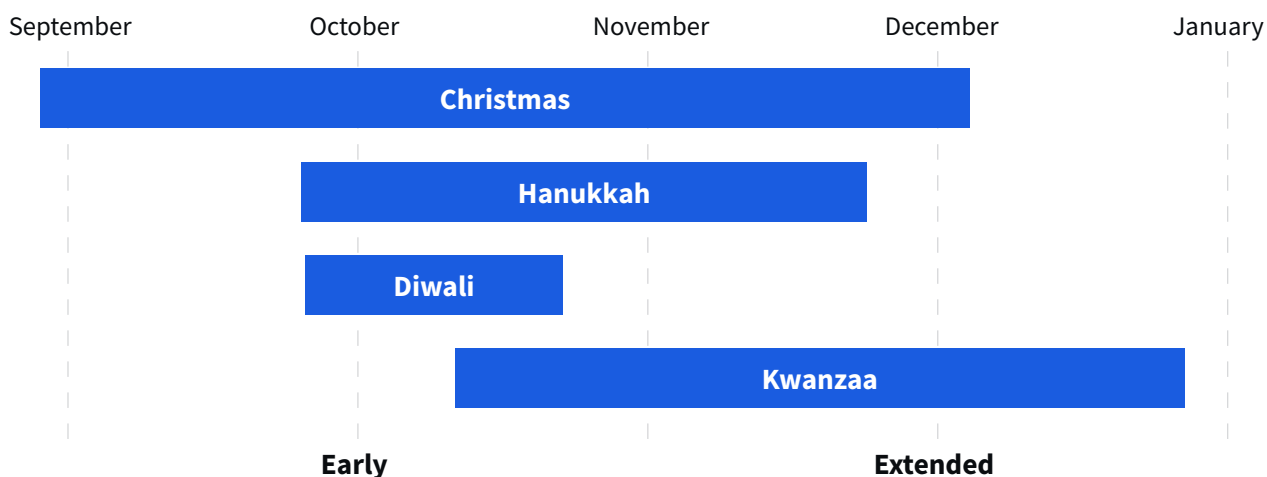
When the season starts, where the moments are, and how decisions actually get made.

Early and extended is the new normal

The holiday shopping season no longer lives in one window. Consumers start earlier and buy throughout, spreading purchases across months instead of reacting to a single peak. Shopping now stretches from September to late December and influence is built over time.

Anticipated 2026 Winter Holiday Shopping Timeline

Holiday Shopping Window



68% shop early to avoid delays

34% seem to be shopping earlier each year

57% shop throughout the year to take advantage of deals

25% plan to spread out their holiday shopping because of current events



THE LESSON FOR BRANDS

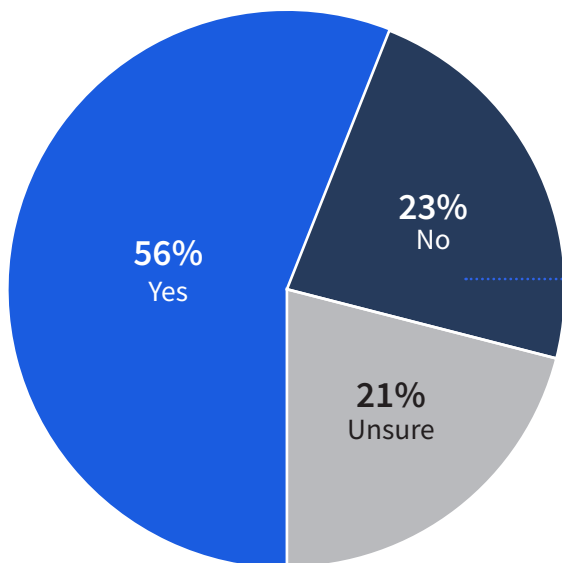
Show up early and stay present. A late, single-burst push misses most of the journey.

Black Friday and Cyber Monday are no longer make-or-break

The big weekend still draws a majority, but its grip on consumers' wallets has loosened. A steady share of shoppers don't see it as essential, because deals now run all season.

Planned Black Friday / Cyber Monday Participation

Do you plan to shop for holiday gifts during 2026 Black Friday/Cyber Monday sales (including sales that extended before/after the actual date)?



54% of shoppers say it's not critical to shop Black Friday and Cyber Monday, since deals are available throughout the season.

9% say no because they plan to be done with their shopping by then. Remaining 14% for another reason.

THE LESSON FOR BRANDS

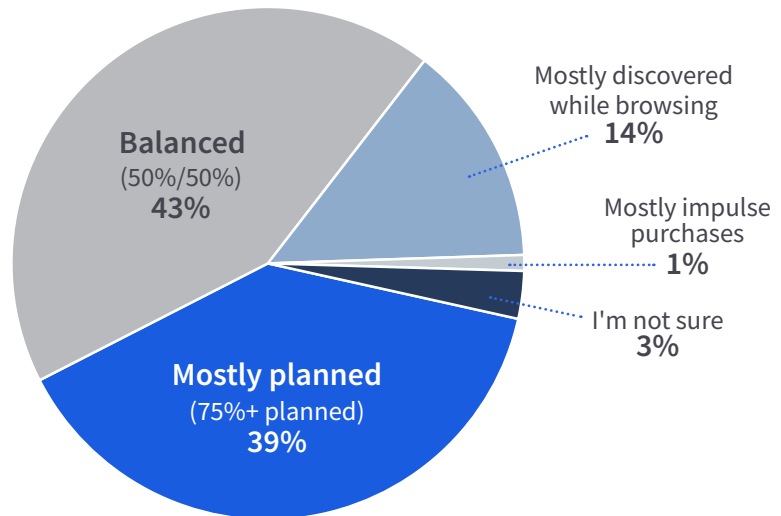
Spread your bets across the season, and stay visible with offers and presence from early fall through December to effectively reach value-seekers when they are actively buying.

Holiday shopping is deliberate

Most purchases are planned well in advance. Shoppers discover ideas along the way but weigh options and validate choices before they buy. Decisions take time, which means brands need presence across the whole journey, well beyond the moment of intent.

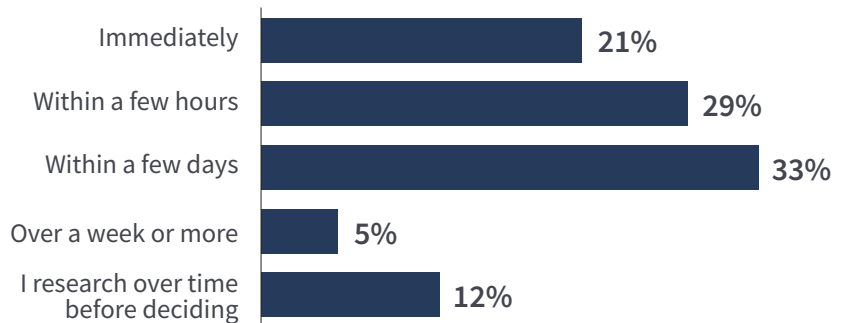
Planned vs. Discovered Gifts

To the best of your knowledge, what percentage of your holiday gift purchases typically planned vs. discovered?



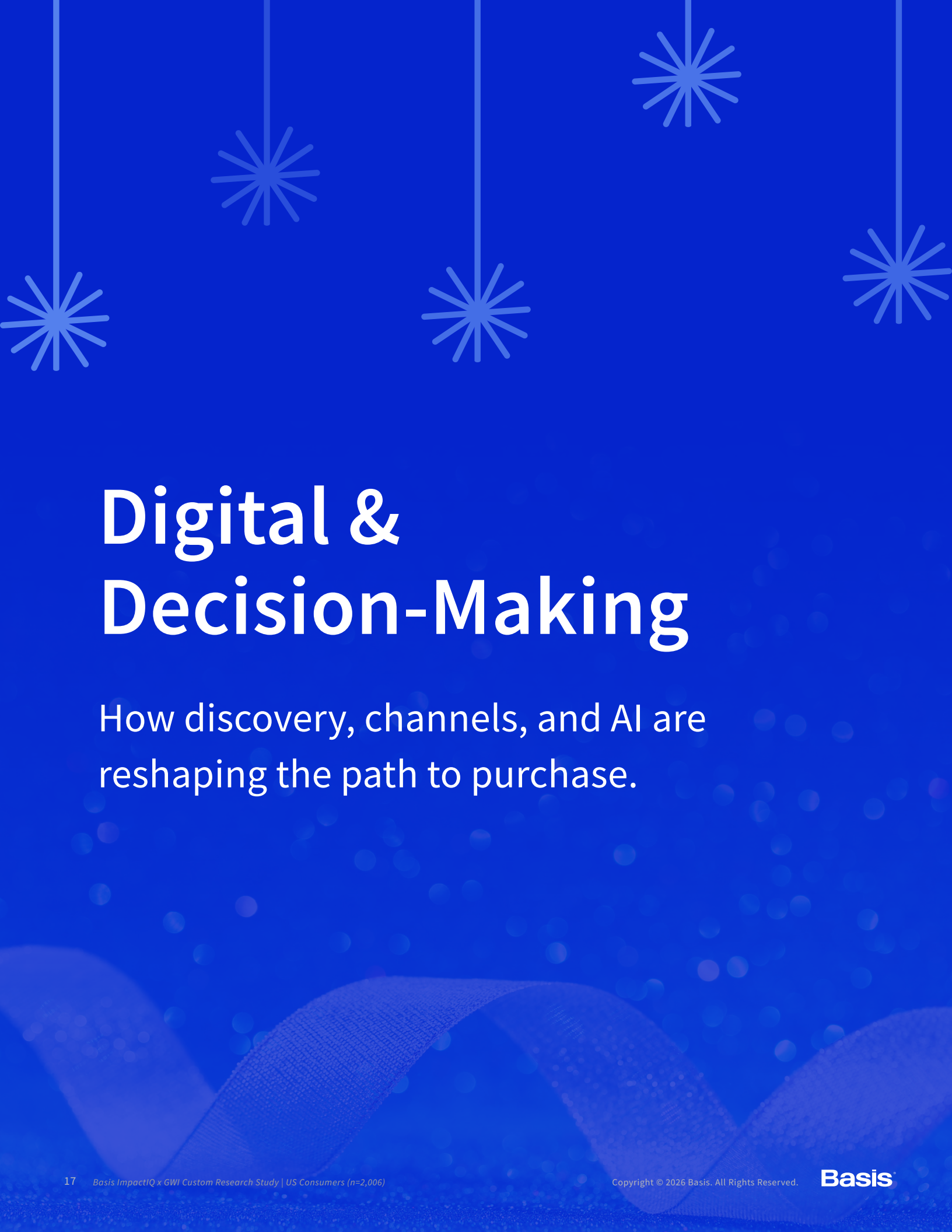
Time Spent Deciding

How quickly do you typically decide on a holiday gift after first discovering it?



THE LESSON FOR BRANDS

Be findable at every step: discovery, comparison, and validation.



Digital & Decision-Making

How discovery, channels, and AI are
reshaping the path to purchase.

Digital defines what consumers consider

The path of discovery runs through digital. A mix of search, social, and AI shapes the gift ideas consumers entertain, often before a brand enters the picture. Search leads, social scales with youth audiences, and AI is emerging. Together, these touchpoints form the consideration set.

Digital tools used by shoppers for their holiday gift buying:

SEARCH 51%

55%	56%
Gen Z	Millennials
51%	43%
Gen X	Baby Boomers

SOCIAL 44%

66%	61%
Gen Z	Millennials
37%	25%
Gen X	Baby Boomers

AI 23%

38%	27%
Gen Z	Millennials
23%	9%
Gen X	Baby Boomers



71% used at least one digital tool to find holiday gift ideas in 2025

TOP SOCIAL SITES:

- Instagram: 21%
- Facebook: 20%
- Pinterest: 16%
- TikTok: 15%
- Reddit: 9%
- X: 7%
- Influencers: 6%

TOP SOCIAL SITES:

- ChatGPT: 12%
- Google Gemini: 12%
- Microsoft Copilot: 7%
- Claude: 1%
- Grok: 1%



THE LESSON FOR BRANDS

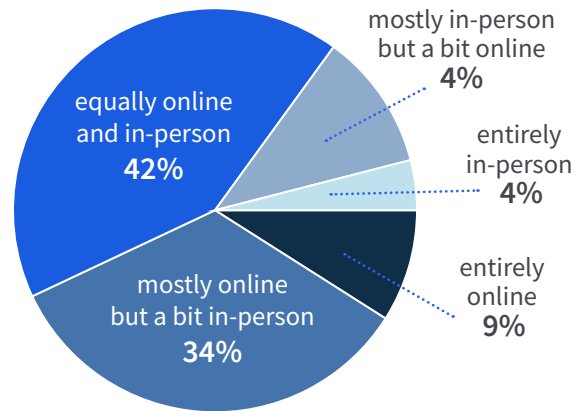
Win early visibility across search, social, and AI, or risk never making the list.

Shopping is a blend of online and in-store

Most consumers split their shopping across channels. They lean online but move fluidly between digital and physical, treating the season as one continuous experience across channels.

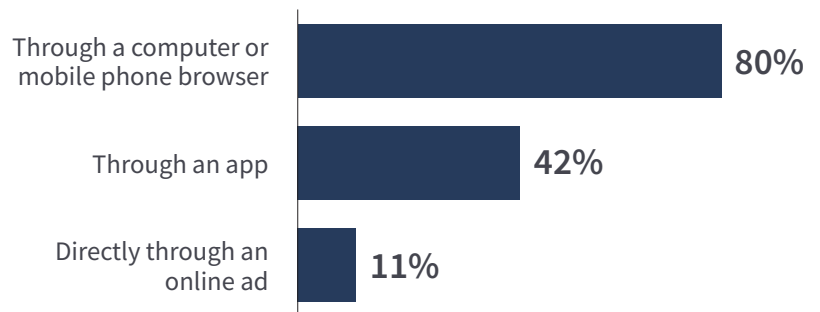
2026 Online vs. In-Store Shopping Plans

Which of the following statements best describe how much you expect to shop in stores or online for winter holiday gifts? I expect to shop...



2026 Online Shopping Methods

Among those shopping:



THE LESSON FOR BRANDS

Support both ends. A seamless browser-to-store path beats betting on a single channel.

Social commerce is small, but growing

Buying directly inside social is still a nascent behavior. But it's rising, and younger consumers are pulling the curve forward. It's a channel to build for now and bank on later.

Purchasing of Gifts Directly from Social Media

2025

11%

of gift buyers purchased gifts directly through social media

2026

19%

of gift buyers are at least somewhat likely to purchase gifts directly through social media

VS

21%

Gen Z

15%

Millennials

9%

Gen X

2%

Baby Boomers

33%

Gen Z

27%

Millennials

13%

Gen X

8%

Baby Boomers

2026 Social Media Shopping Channels

(Among those likely to buy gifts directly from social media)



50%



50%



43%



32%



THE LESSON FOR BRANDS

Experiment now with younger audiences; expect the share to climb.

AI is in play, but adoption is early

AI is already part of the shopping landscape for a meaningful minority. Most consumers, though, are still trialing or considering it rather than committing. The behavior hasn't consolidated yet.

40% are open to AI,
with Gen Z leading the way



Planned AI Usage for the 2026 Holiday Season

*Do you plan to use AI in your 2026
holiday shopping or planning?*

Yes: 17%

24% Gen Z	22% Millennials
18% Gen X	8% Baby Boomers

Unsure: 23%

16% Gen Z	22% Millennials
28% Gen X	25% Baby Boomers



THE LESSON FOR BRANDS

The window is open. Build visibility inside AI tools before habits set.

AI assists with decisions, but it doesn't yet make them

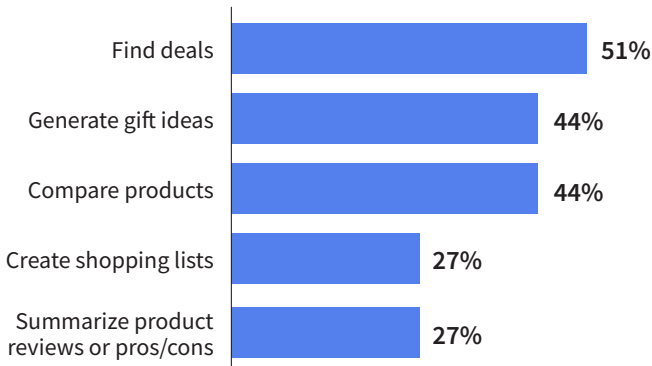
Consumers want to use AI for the work around a decision: finding deals, generating ideas, comparing products. They're far more hesitant to hand over the purchase itself, a clear signal that control and trust still matter.



Help with the decision? Yes. Take over the purchase? Not quite yet.

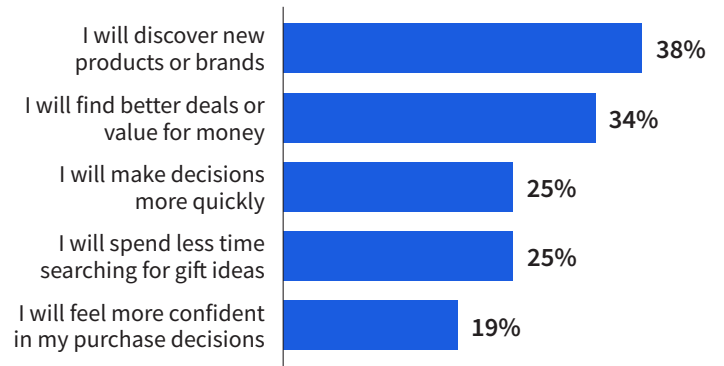
Top 5 AI Uses

How do you think you will use AI in your 2026 holiday shopping or planning? Among those likely to use AI



Top 5 Impacts of AI

How do you think using an AI tool will change your holiday shopping experience or behaviors from years prior? Among those likely to use AI or unsure



THE LESSON FOR BRANDS

Show up where AI helps shoppers decide; don't assume it will close the sale for you.



What this all means for the 2026 season

The 2026 season is defined by both emotional intent and practical constraint. Winning brands balance meaning with value, showing up early, supporting the full decision journey, and stripping out complexity wherever they can. The brands that align with how consumers feel and how they behave will capture the attention, engagement, and spend that's up for grabs.

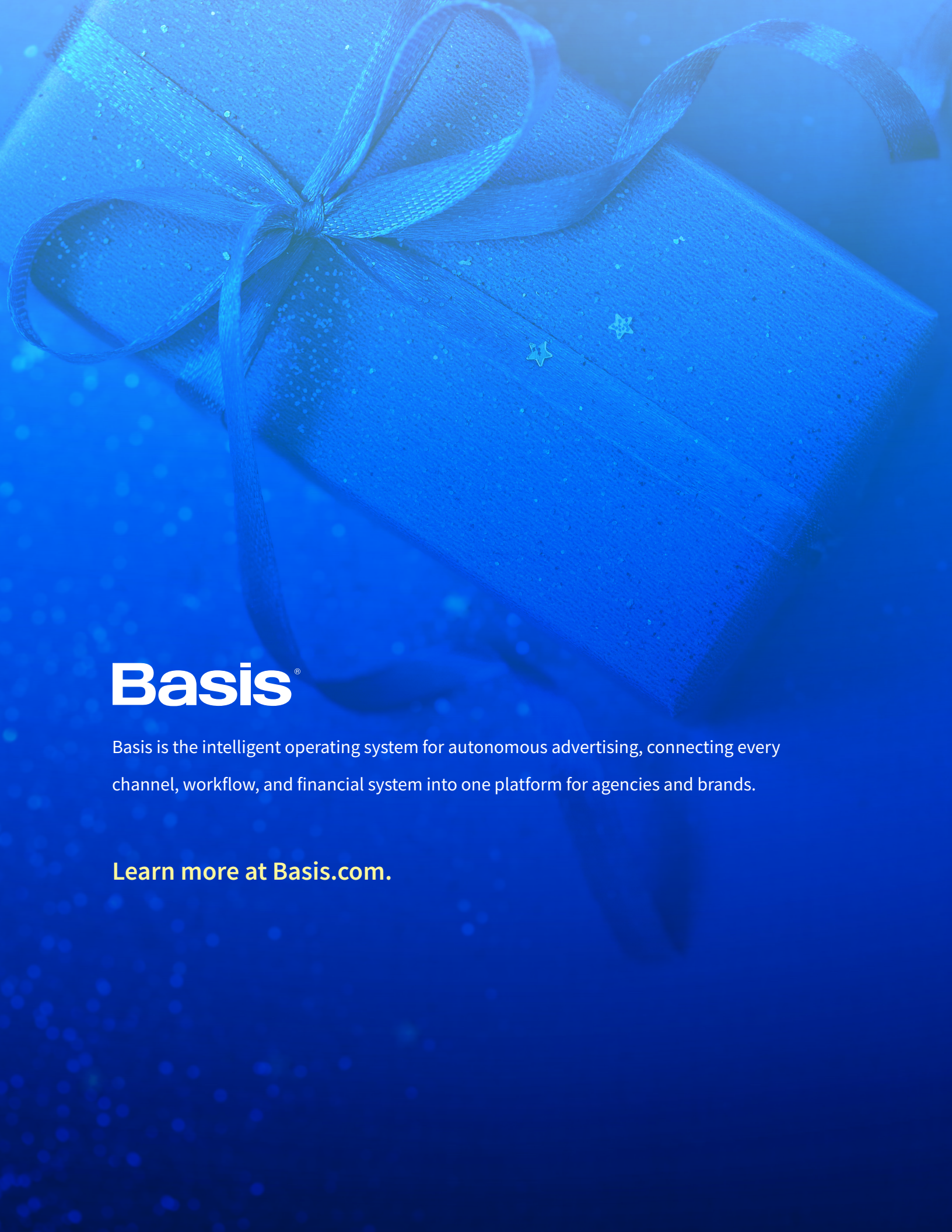




Five Forces Shaping the 2026 Holiday Shopping Season

1. Holidays stay emotionally central, and connection still leads.
2. Consumers enter the season more planned and more value-focused.
3. Shopping starts early and runs across a longer window.
4. Digital shapes discovery and decisions from the start.
5. AI and social influence the journey—even when they're not the final checkout.





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