dynata™

2026 HOLIDAY GUIDE

From insight to activation:

Turning consumer attitudes and purchase intent into activation-ready, high-performing audiences available for you directly in LiveRamp.



Every trend and behavior highlighted here represents real consumer research that's already been transformed into ready-to-use audience segments. **These aren't hypothetical categories; they're live, activation-ready audiences you can deploy today across LiveRamp, The Trade Desk, Meta, Google, or any buying platform of your choice.**

Think of this guide as a working example of Dynata's broader capability: we don't just report on consumer behavior, we turn it into targetable audiences built on real survey responses from real people. What you see in these pages is a small sample of what's possible. Dynata offers over 2,800 syndicated segments, plus the ability to build fully custom audiences from any research question you need answered.



ABOUT OUR METHODOLOGY Dynata surveyed 2,000 representative respondents in the U.S. to help you understand the trends impacting consumer spending plans this holiday season. We then created audience segments for targeting based on the insights uncovered in this study. Use this guide to improve your outcomes through insights, targeting, or audience modeling. If you'd like to turn market research into custom audience segments, reach out to learn more. We look forward to connecting.

This guide is more than a look at **consumer sentiment this holiday season**; rather, it's a preview of what's possible with Dynata's Audience Activation solution.

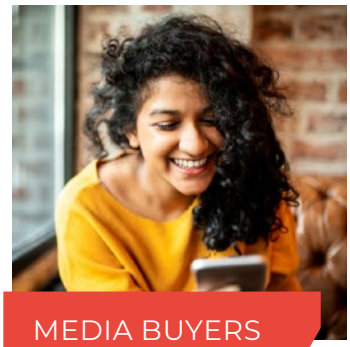
Who this guide is for:

Marketing and media leaders turning consumer insights into targetable advertising audiences, looking to sharpen messaging and media strategies with declared attitudinal, sentiment, and intent data.


MARKETERS


STRATEGISTS


MEDIA PLANNERS


MEDIA BUYERS

What's in this guide:

- **Consumer sentiment and signals shaping the 2026 holiday season**
- **Consumer budget and spending plans — categories they'll shop, what drives purchase decisions, and which media touchpoints matter most**
- **Syndicated audience segments built directly from this survey, available via Dynata's Audience Activation solution**

Let's dive in.

Five signals shaping the 2026 holiday opportunity

Consumers are not moving in one direction. The season is defined by a broad middle that expects steady spending, a meaningful growth segment, intense sensitivity to value, and some pockets of demand for premium brands.

The planning advantage comes from finding the right audience for each message, reaching the right segment for your brand.

74%

say promotions or discounts motivate them to start shopping. Percentage discounts are the single most influential promotion for **43.8%**, followed by free shipping at **30.2%**.

62% use online search for holiday gift discovery. Retail sites and apps, social media, and TV/CTV also play meaningful discovery roles.

47%

expect to spend about the same as last year. Another **26.5% expect to spend slightly or much more, while 26.6% expect to spend less.**

33%

often or almost always trade up during the holidays. Better quality is the dominant justification for paying more, selected by 70.1%

52% say health and wellness is very or extremely important. Vitamins, supplements, self-care and fitness products create a sizable seasonal opportunity.

For marketers

Do not treat “holiday shoppers” as one target. Build audiences around spending posture, value triggers, discovery behavior, category intent, premium propensity and wellness priorities. Then align the creative promise and media environment to the reason each group is ready to act.

Consumers' spending intentions, an even split

Nearly half of consumers expect holiday spending to remain stable. The remainder is almost evenly split between those planning to spend more and those planning to spend less. That balance argues against a single recessionary or celebratory narrative. The market will reward segmentation.

EXPECTED HOLIDAY SPENDING VERSUS LAST YEAR



Younger adults provide a growth pocket: **56.4% of ages 18-34 expect to spend more,** compared with 26.6% of ages 35-54 and 19.9% of ages 55+.

55% expect total holiday spending below $500

21% expect $500-$999, while 25% expect $1,000 or more across gifts, food, travel and experiences.

Dynata's Syndicated Audience segments can help marketers reach high-propensity cohorts and engage them across channels with timely, holiday-aligned messaging.

Consider the following high-spending holiday audiences:

- **Plans to spend slightly more or much more this holiday season**
- **Expects to spend $1,000 or more this holiday season**

Promotions signal the start of the season

Each year the holiday period seems to begin sooner; perhaps marketers know their offers mark the season's opening for buyers. Ranking above convenience, time savings, budget management, and scarcity, promotions and discounts lead the purchase triggers.

Shoppers appear to weigh the influences they can sense today, such as their own income and available discounts and promotions, more heavily than wider economic conditions.

WHAT WILL INFLUENCE HOLIDAY SPENDING THIS YEAR



WHAT MOTIVATES CONSUMERS TO START SHOPPING



Holiday clearance is the most widely cited event shoppers plan to participate in, 62%, followed by Black Friday at 60%. Prime Day-style events and Cyber Monday each attract 53%.

Media plans should treat the calendar as a sequence of audience moments, not one peak weekend.

60%
plan to shop Black Friday

Consider the following syndicated audience segments for targeting your next campaign:

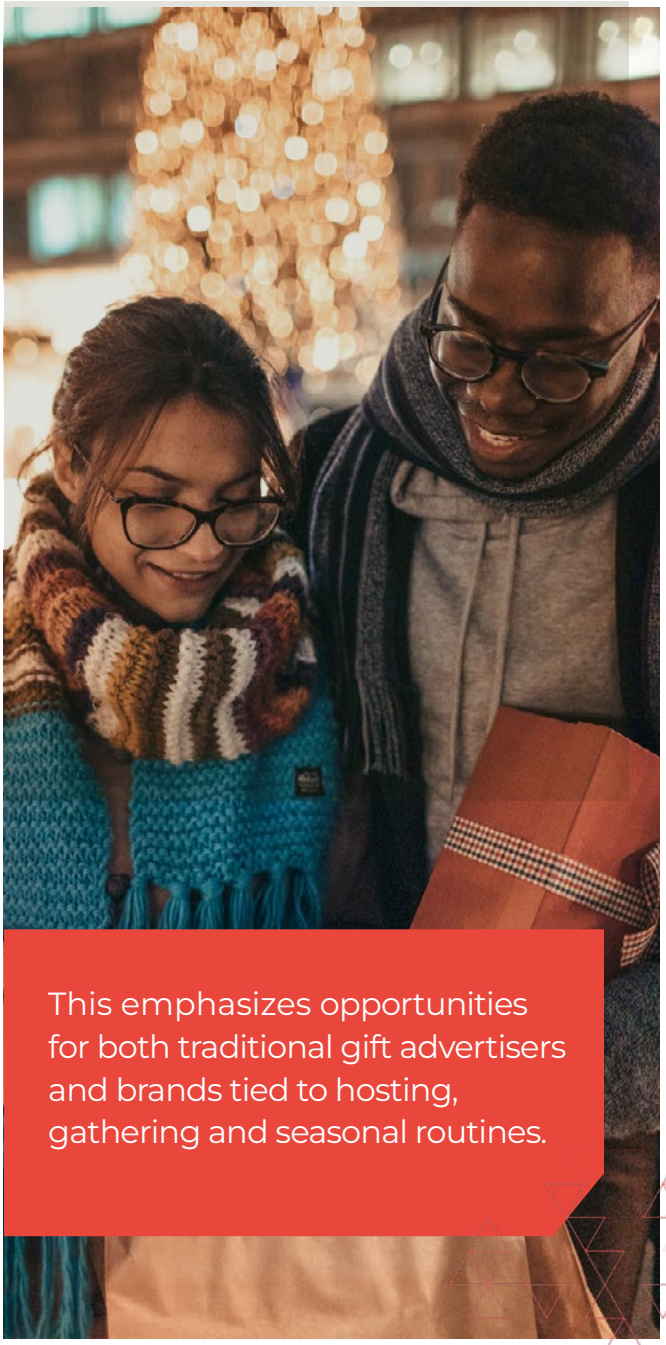
- **Plans to shop Black Friday deals**
- **Plans to shop Cyber Monday deals**
- **Holiday shopping is influenced by discounts and promotions**

Practical categories dominate spending plans

Consumers seem to look to practical gift giving this year, and possibly to spending on themselves, with almost 70% saying clothing shoes & accessories will receive the largest share of their holiday spend.

LEADING CATEGORIES CONSUMERS PLAN TO SHOP

- **69%** clothing, shoes & accessories
- **58%** gift cards
- **47%** beauty & personal care
- **40%** toys & games
- **35%** experiences
- **28%** travel



This emphasizes opportunities for both traditional gift advertisers and brands tied to hosting, gathering and seasonal routines.

Consider the following syndicated audience segments for targeting your next campaign:

- **Plan to shop for clothing, shoes and accessories**
- **In-market beauty and personal care this holiday**
- **Plan to shop for toys and games this holiday**
- **In-market holiday experiences**
- **In-market holiday travel**

Despite practical category spending, quality and reputation encourage higher-priced options

33% often or almost always trade up to a higher-priced or premium product during the holidays. And 55% sometimes choose a higher-priced or premium product during the holidays.

The trade-up happens for better quality, which coincides with reputation and strong reviews. 27% of respondents saying they would act on an exclusive offer.

Brands that lead on quality should consider messaging strategies that highlight their value and reputation this holiday; ensure that messaging is targeted to consumers who are open to spending more.

WHAT MAKES HIGHER-PRICED OPTIONS WORTH IT





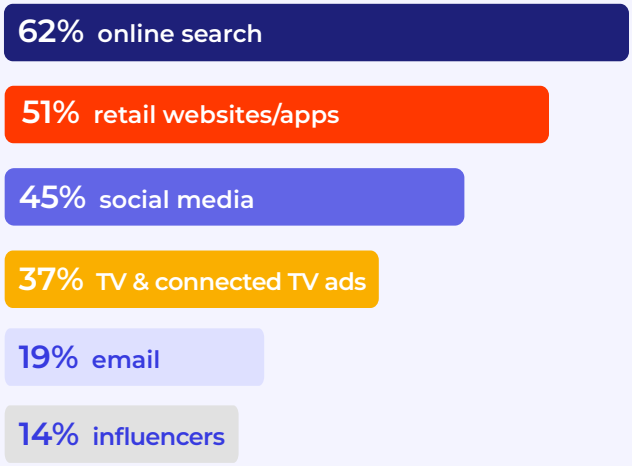
Consider the following syndicated audience segments for targeting your next campaign:

- **Plan to shop for clothing, shoes and accessories**
- **In-market beauty and personal care this holiday**
- **Plan to shop for toys and games this holiday**
- **In-market holiday experiences**
- **In-market holiday travel**

Media's influence on holiday shopping

Consumers said they typically discover holiday gift ideas primarily by online search but no single channel owns inspiration. Retail environments can convert active exploration, while social and TV/CTV can create demand before a query exists. The implication is to coordinate audience definitions and creative cues across platforms rather than optimizing each channel in isolation.

WHERE CONSUMERS DISCOVER HOLIDAY GIFT IDEAS



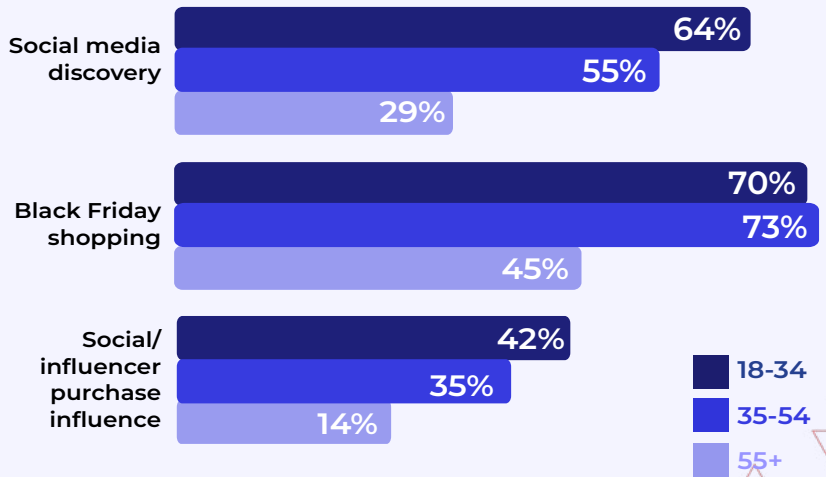
14%

of consumers will lean on social influencers for gift ideas this holiday; a behavior most expected among adults under 35.

The strongest planning differences are not simply demographic. They reflect different media habits and event participation.

Social discovery, including influencers, is especially pronounced among younger adults, while older adults show comparatively stronger preference for free shipping and lower participation in the major deal events tracked.

HOLIDAY BEHAVIORS BY AGE



Go from insight to activation with holiday-ready audiences

Use the segments below to activate high-value audiences and holiday shoppers via programmatic, CTV, social, DOOH, and more.

HOLIDAY SPENDING & BUDGET

- Spending Less Than Last Year
- Spending More Than Last Year
- Mid-Range Gift Shoppers ($500–$1,499)
- Big Gift Spenders ($1,000+ on Gifts)
- Spending About the Same
- Budget-Conscious Shoppers (Under $500)
- Big-Ticket Holiday Shoppers ($1,500+)
- Moderate Gift Budgeters ($500–$999 on Gifts)

HOLIDAY TRADITIONS, HOSTING & TRAVEL

- Summer Holiday Hosts
- Flying Home for the Holidays
- Taking the Train Home for the Holidays
- Holiday Broadway Fans
- Winter Holiday Hosts
- Driving Home for the Holidays
- Family Holiday Visitors

GIFTING & SHOPPING CALENDAR

- Early-Bird Shoppers (Buy in November)
- All-Around Holiday Shoppers
- Down-to-the-Wire Shoppers (Buy in December)
- Holiday Decorators

WHAT THEY'RE BUYING: CATEGORY FOCUS

- Toy & Game Gifters
- Smart Home & Tech Shoppers
- Experience Gifters
- Fashion & Accessory Shoppers
- Jewelry & Watch Shoppers
- Gift Card Buyers
- Mobile & Device Shoppers
- Furniture & Home Shoppers
- Holiday Travelers
- Fitness & Wellness Gifters
- Beauty & Self-Care Shoppers
- Luxury Shoppers
- Electronics Shoppers
- Home Appliance Shoppers

Holiday-ready audiences

Use the segments below to activate high-value audiences and holiday shoppers via programmatic, CTV, social, DOOH, and more.

DEAL EVENTS & SHOPPING MOTIVATIONS

- Black Friday Shoppers
- Cyber Monday Shoppers
- Prime Day-Style Shoppers
- Clearance Hunters
- Deal-Motivated Shoppers
- Beat-the-Shortage Shoppers
- Budget-Spreading Shoppers
- Convenience-First Shoppers
- Time-Saving Shoppers

WHAT DRIVES THEIR SPEND

- Discount-Driven Shoppers
- Economy-Minded Shoppers
- Income-Driven Shoppers
- Stock-Availability Shoppers
- Brand-Loyal Shoppers



PROMOTIONS THAT WIN THEM OVER

- Percent-Off Shoppers
- Free-Shipping Seekers
- Bundle Buyers
- Loyalty Reward Shoppers
- Limited-Time Deal Shoppers

Turn insights into precise audience targeting

SYNDICATED AUDIENCES

Dynata offers over 2,800 activation-ready audiences, based on research like this, available via LiveRamp, The Trade Desk, Meta, Google, or any buying platform of your choice.

CUSTOM AUDIENCES

Dynata's custom audiences offer the flexibility and precision to reach exactly who you need. Go from custom research to activation, resulting in more ROI.



Ready to connect with your best audience and skip the guesswork?

Contact Dynata today

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