

UNITED STATES



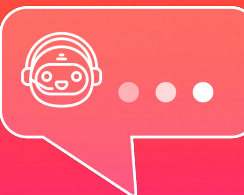
The bots and the basket:

AI's role in Black Friday and Cyber Monday 2026

How U.S. shoppers plan to spend, and how AI is changing the way they find a deal.

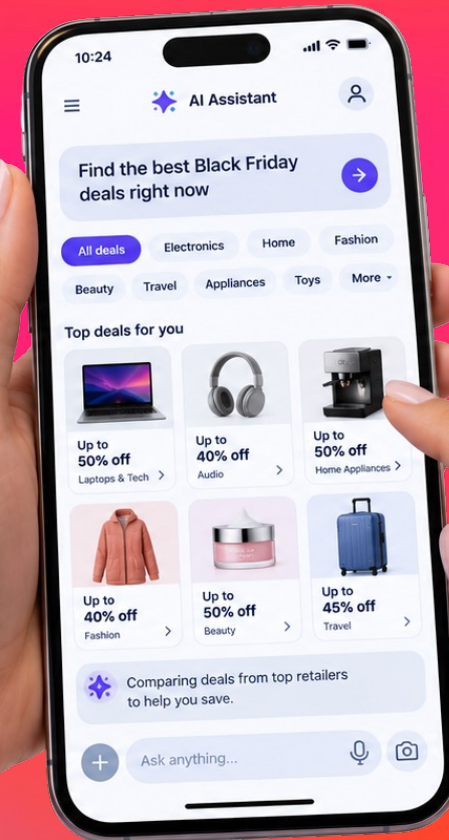
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What are the top 10 best deals this Black Friday/Cyber Monday?



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Foreword



AI is becoming a more established part of the Black Friday and Cyber Monday (BFCM) shopping journey. Among likely BFCM shoppers, the share who say they are likely to use AI to navigate the sales has more than doubled since last year, from 16% to 34%. And among those who used AI tools during last year's sales, most expect to use it as much or more this year.

But shoppers are drawing a clear line around what they want AI to do. They are comfortable using it to find prices, track deals and compare products, but far fewer are ready to let it add items to a basket or complete a purchase. AI also remains the lowest-confidence way to find the best deal overall, behind familiar channels such as retailer websites.

For retailers and brands, that points to a more immediate opportunity than automated shopping: help AI help the shopper. Accurate product information, clear pricing and credible recommendations can put brands in the conversation while consumers still retain control of the final purchase."

Mark Fantino

Senior Vice President, YouGov America

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Key takeaways

01

Planned AI use for BFCM has more than doubled in the past year: 16% to 34%

A third of likely BFCM shoppers now plan to use AI to help navigate the sales, up from just 16% last year, a sign that AI-assisted shopping is moving from a niche behavior to the mainstream.

02

Most recent AI users expect to maintain or increase their use

Trial is close to one-way, with 92% of last year's AI users planning to maintain or increase their use. Very few shoppers who have used AI to shop BFCM sales expect to decrease their use.

03

AI is strongest at discovery, not checkout

Shoppers will let AI research and compare, but want to make the purchase themselves. AI inspires the least confidence as a deal finder at 48% against 80% for retailer sites.

Why YouGov?

YouGov is a market research and analytics company powered by reality: insight from real people, captured in real time, built to hold up when decisions matter. Because quality is easy to claim and hard to prove, we don't just publish data, we stand behind it: an owned, highly engaged panel, rigorous quality controls, and technology that strengthens the human response instead of distorting it.



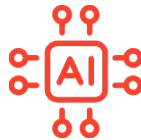
Real people

Highly engaged panel members share true reflections of their reality rooted in an ongoing relationship, not one-off transactions.



Accurate data

Data you can trust with confidence. Designed for representativeness, integrity and accuracy, and backed by a system built to prove it.



Pioneering tech & AI

Always-on technology that strengthens real-world insight keeping the data clean, scaling analysis, and avoiding the distortions that come from weak inputs.



Award-winning experts

Research experts who turn robust data into usable decisions tailoring delivery, interpreting change, and making insights actionable in the real world.

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Assessing the appetite for Black Friday and Cyber Monday in 2026



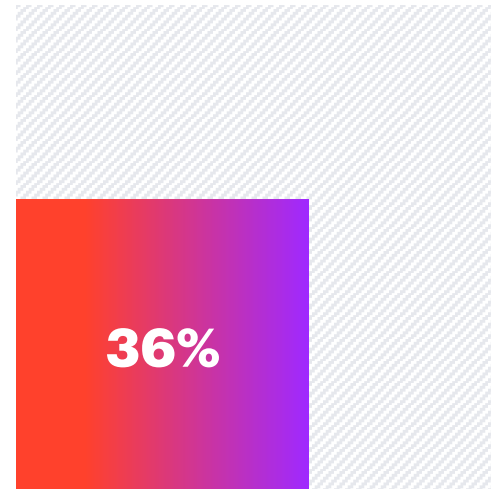
Younger Americans lead BFCM shopping intent

BFCM purchase intent is highest among younger consumers: 47% of Gen Z and Millennials say they are likely to shop, compared with 27% of Gen X and Baby Boomers+.

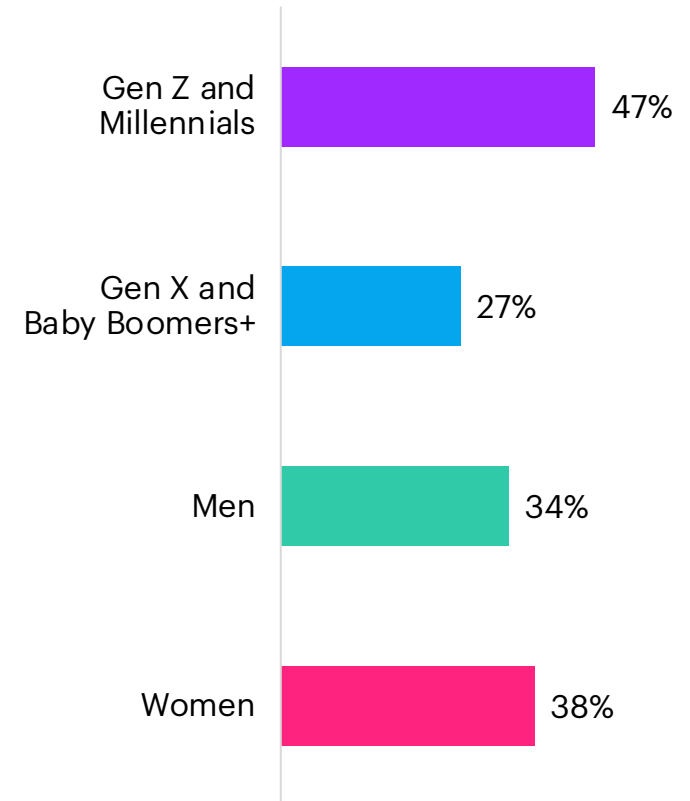
Women are also slightly more likely than men to expect to shop (38% vs. 34%).

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How likely are you to make purchases during Black Friday or Cyber Monday? Answered “very likely” or “somewhat likely” (U.S. gen pop)



of **US gen pop** is likely to shop during Black Friday or Cyber Monday





Who are America's BFCM shoppers?



Male: 46%
Female: 54%

Compared with 49% male, 51% female in U.S. gen pop



30%

have used AI tools for shopping (e.g. research or completing a purchase)

Compared with 18% of U.S. gen pop



29%

are Gen Z

Compared with 19% of U.S. gen pop



36%

of Americans are BFCM shoppers



\$393

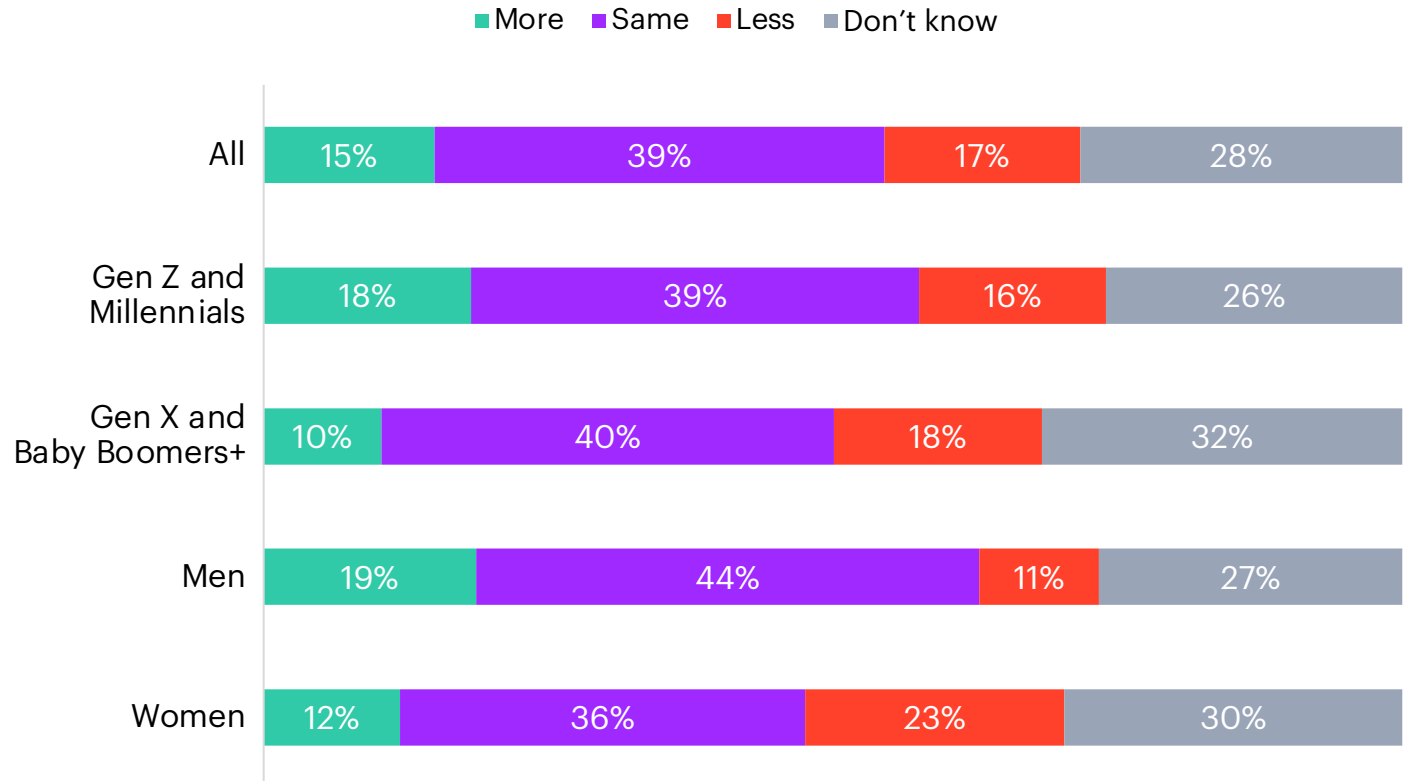
Expected mean spend

Spending is most likely to stay at last year's levels, with men and younger shoppers most likely to increase

As of summer 2026, 39% of likely shoppers expect to spend about the same as last year. Smaller shares expect to spend less (17%) or more (15%), while 28% are not yet sure.

Younger shoppers (Gen Z and Millennials) are more likely to spend more this year (18%) than their elders, and men (19%) are more likely to do so than women (12%). Women (23%) are more likely than men to say that they expect to spend less this year (23% vs. 11%).

Compared with last year, how much do you expect to spend during BFCM? (likely BFCM shoppers)



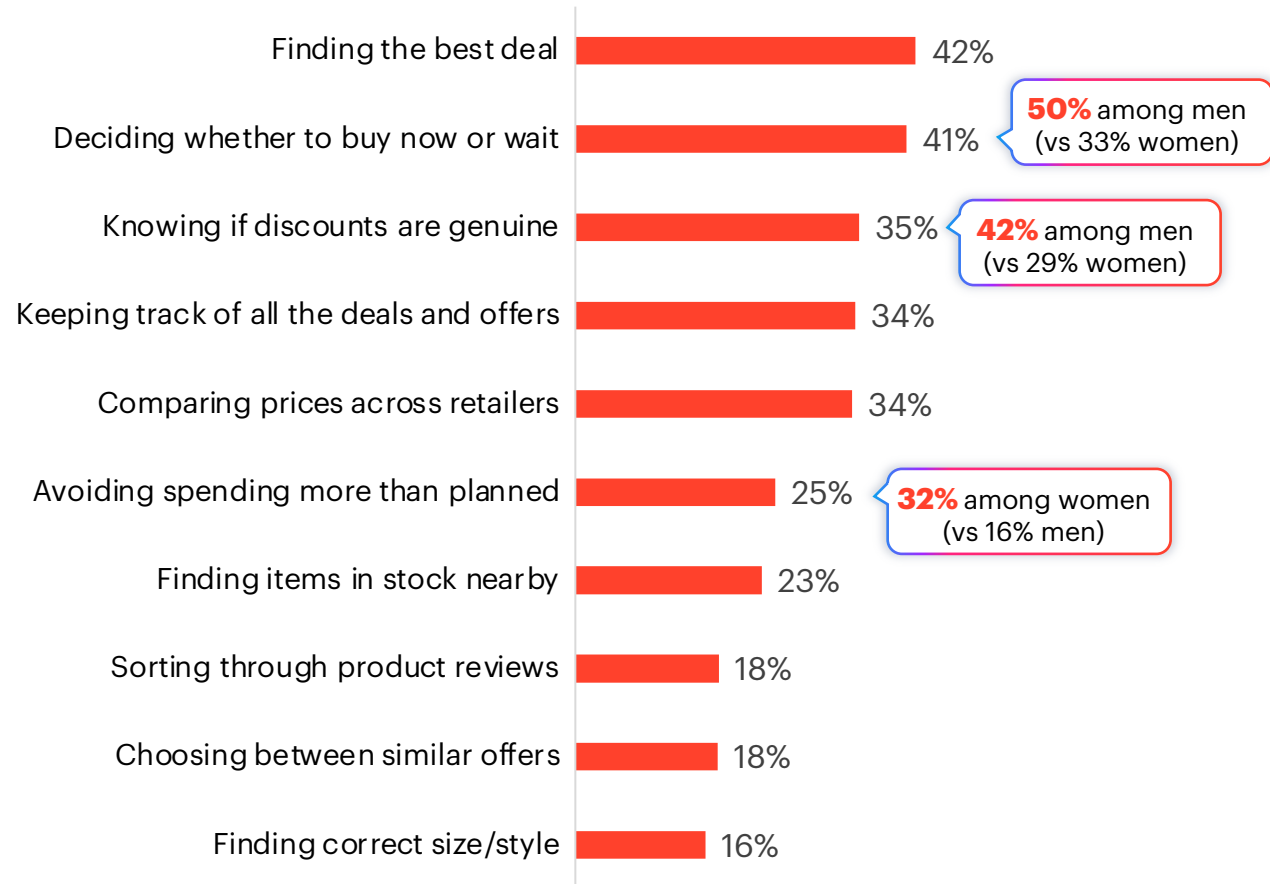
YouGov Surveys, July 13, 2026 – August 11, 2026. BFCM shoppers n> 500, Gen Z and Millennials n> 300, Gen X and Baby Boomers+ n> 200, men n> 200, women n> 250. Responses rebased by excluding "Not applicable" option.

Many BFCM shoppers face a deal-overload problem

Finding the best deal is the biggest challenge for likely BFCM shoppers (42%), closely followed by deciding whether to buy now or wait (41%). More than a third struggle to judge whether discounts are genuine (35%), keep track of competing offers (34%) or compare prices across retailers (34%).

Men are more likely than women to find it difficult to decide whether to buy now or wait (50% vs. 33%) and know if deals are genuine (42% vs. 29%). Twice as many women are more concerned with spending more than planned (32% vs. 16%).

Which aspects of shopping during BFCM do you find difficult? (likely BFCM shoppers)



The role of AI for retail:

Interest in AI shopping is growing, from a low base

AI shopping is still emerging, but BFCM shoppers show growing interest in using it to navigate a complex sales environment.

AI tools and shopping: U.S. adoption lags (18%)

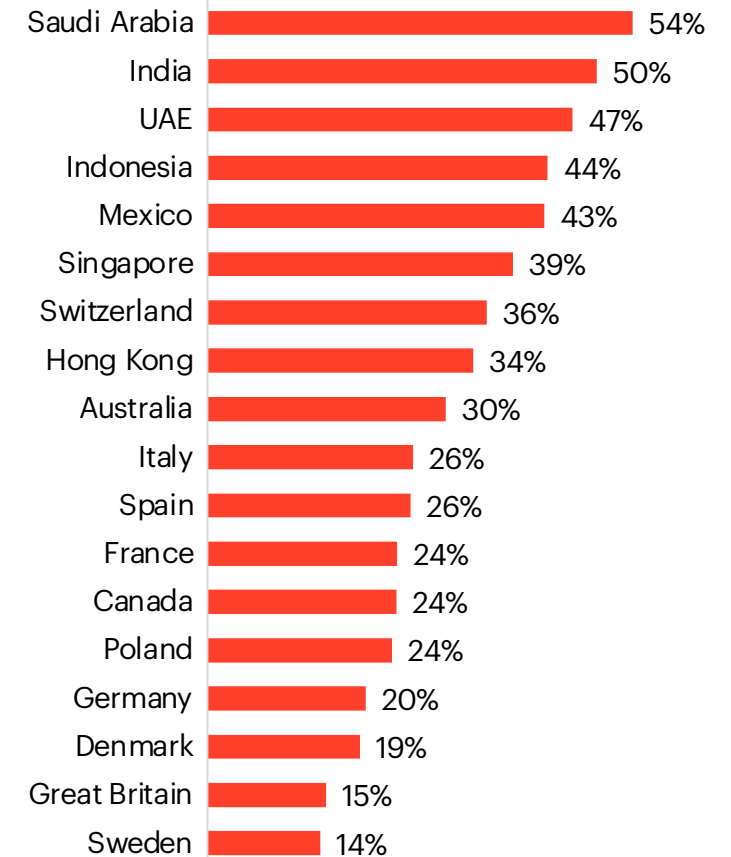
AI tool usage for shopping splits sharply by market: around half of adults in Saudi Arabia and India have used AI to shop, against far lower rates across Western Europe and North America.



YouGov Surveys, July 13, 2026 – August 11, 2026. U.S. n> 1,400, Hong Kong n> 450, Great Britain n> 2,000, rest of the markets n> 950 each. % respondents selecting “I have used AI tools to help me shop, including anything from telling me about products to completing a purchase” to question: Which, if any, of the following best describes your experience using AI tools when shopping?

Which, if any, of the following best describes your experience using AI tools when shopping? Answered
“I have used AI tools to help me shop” (gen pop)

U.S. 18%

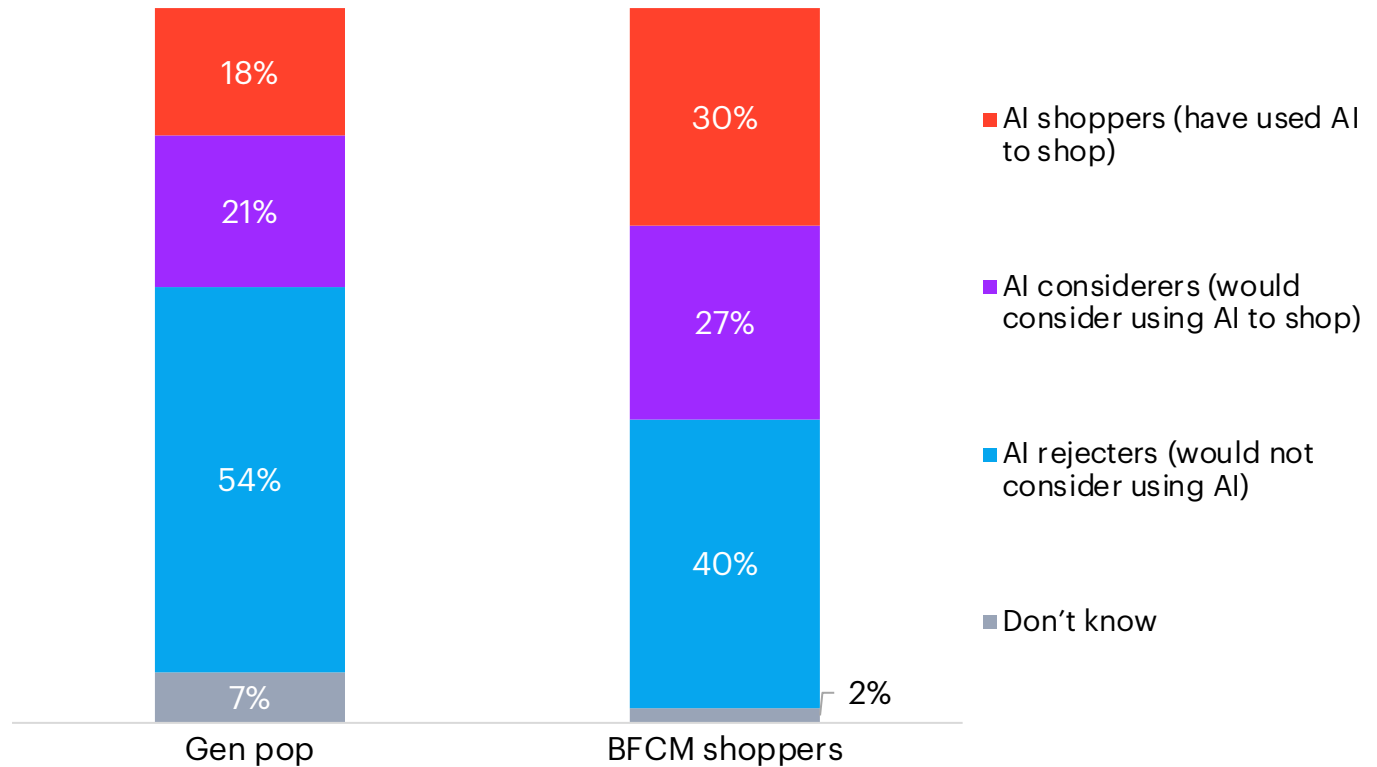


AI shopping is not yet widespread, but BFCM shoppers are more open

Around one in five U.S. adults (18%) say they have already used AI tools to help them shop, while another 21% have not used them but would consider doing so.

Openness is considerably higher among likely BFCM shoppers: 30% have already used AI for shopping and another 27% would consider it. Four in 10 say they would not consider using AI in this way.

Which, if any, of the following best describes your experience using AI tools when shopping? (U.S. gen pop, likely BFCM shoppers)



YouGov Surveys, July 13, 2026 – August 11, 2026. U.S. gen pop n> 1,400, BFCM shoppers n> 500.

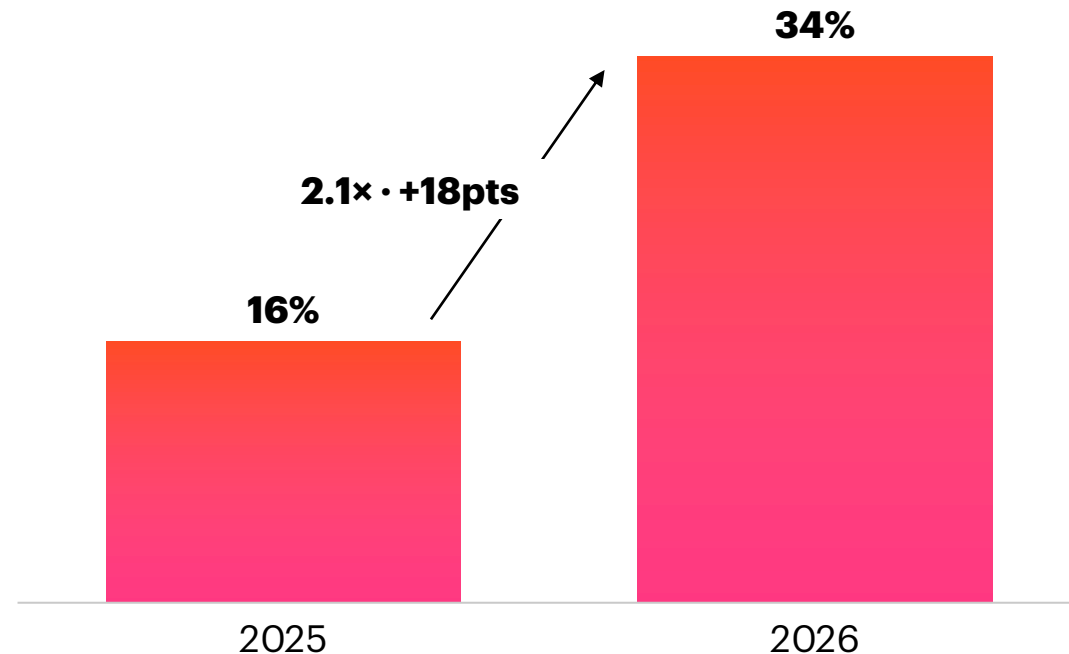
AI shoppers: "I have used AI tools to help me shop, including anything from telling me about products to completing a purchase". AI considerers: "I have not used AI tools to help me shop, but I would consider doing so". AI rejecters: "I have not used AI tools to help me shop, and I would not consider doing so".

Planned AI use for BFCM has more than doubled since last year

This year, 34% of likely BFCM shoppers say they are likely to use AI to help navigate the sales. In last year's survey, 16% said they were likely to use AI to help navigate mega sales events.

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How likely or unlikely are you to use an AI tool to help make the BFCM easier to navigate this year? Answered "very likely" or "somewhat likely" (likely BFCM shoppers)



YouGov Surveys, July 13, 2026 – August 11, 2026. 2026 BFCM shoppers n> 500, 2025 BFCM shoppers n> 700 (2025 survey fielded from August 8 – August 18, 2025). Question wording changed between surveys: 2025 referred to major sales events and 2026 to BFCM. 2025 question: "How likely or unlikely are you to use an AI (Artificial Intelligence) tool (e.g., ChatGPT, Gemini, Amazon Alexa, Siri, etc.) to help make the mega sales events easier to navigate this year?"

Most who have tried AI expect to maintain or increase usage

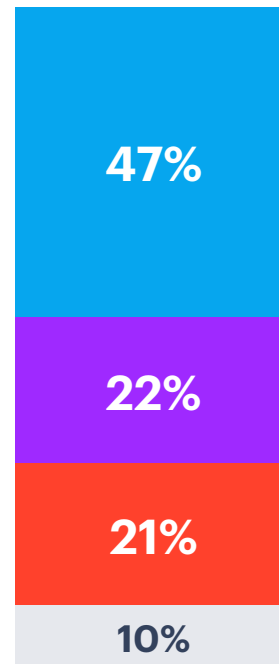
Just 21% of likely BFCM shoppers used standalone AI to navigate the sales last year.

Within the group, 92% expect to use AI as much or more this year and only 8% expect to cut back.

A further 22% of all likely BFCM shoppers expect to start this year.

Compared with last year's BFCM sales, how do you expect your use of standalone AI tools to change? (likely BFCM shoppers)

All BFCM shoppers



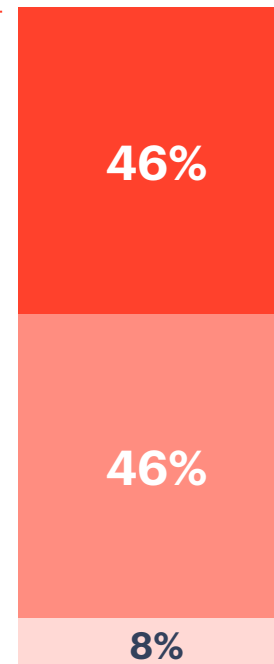
Did not use last year,
do not expect to
start this year

Expect to start this
year

Used AI last year

Don't know

Used AI last year



Will use more

**Will use the
same**

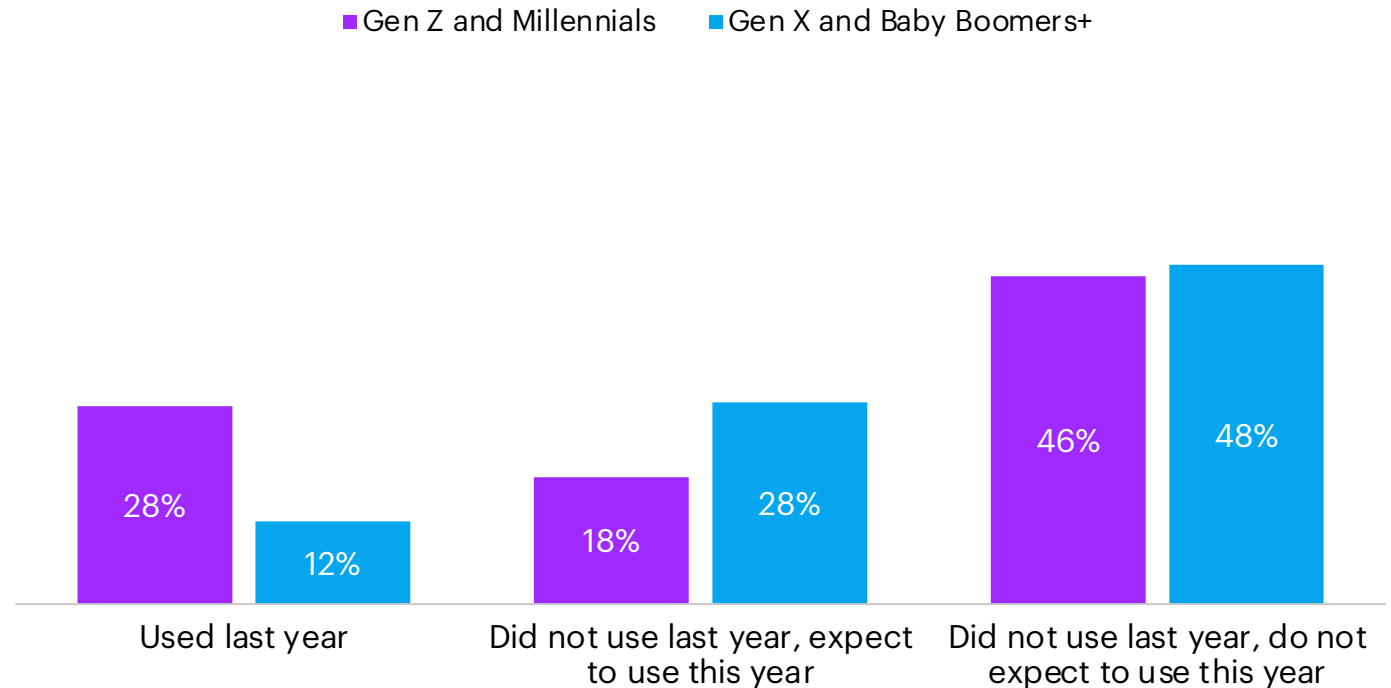
Will use less

Older shoppers lag on current AI use, but not openness

Rejection of AI is flat across age: 46% of Gen Z and Millennials say they would not consider it, against 48% of Gen X and Baby Boomers+.

The bigger difference is experience: younger shoppers are more likely to be current users (26% vs. 10%), while older shoppers are more likely to say they expect to start this year (29% vs. 18%).

Compared with last year's BFCM sales, how do you expect your use of standalone AI tools to change? (likely BFCM shoppers)



YouGov Surveys, July 13, 2026 – August 11, 2026. BFCM shoppers: U.S. gen pop n> 500, Gen Z and Millennials n> 200, Gen X and Baby Boomers+ n> 250. "Don't know" responses not shown.

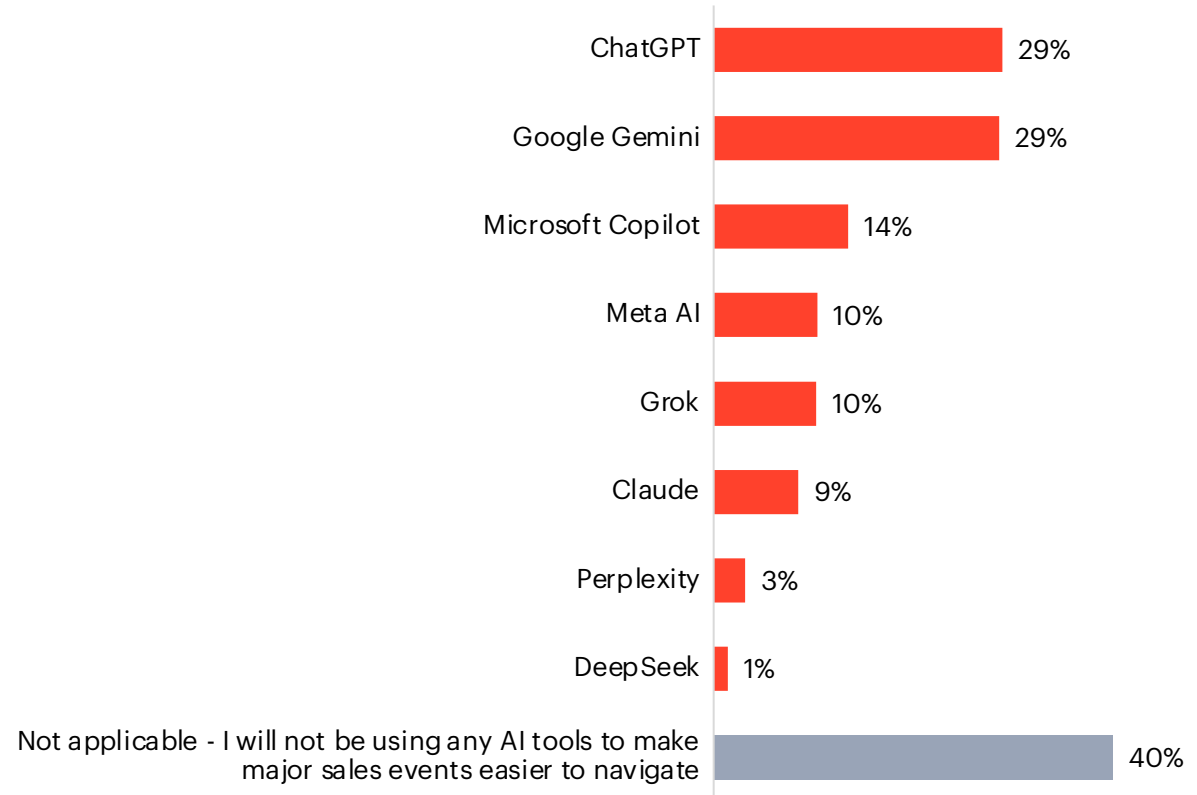
ChatGPT and Gemini lead the AI tools BFCM shoppers would use

Among likely BFCM shoppers, Four in ten say they will not use any AI tool during the sales.

ChatGPT and Google Gemini are the most widely selected tools, at 29% each, followed by Microsoft Copilot at 14%. Around one in 10 select Meta AI or Grok, and Claude is selected by 9%.

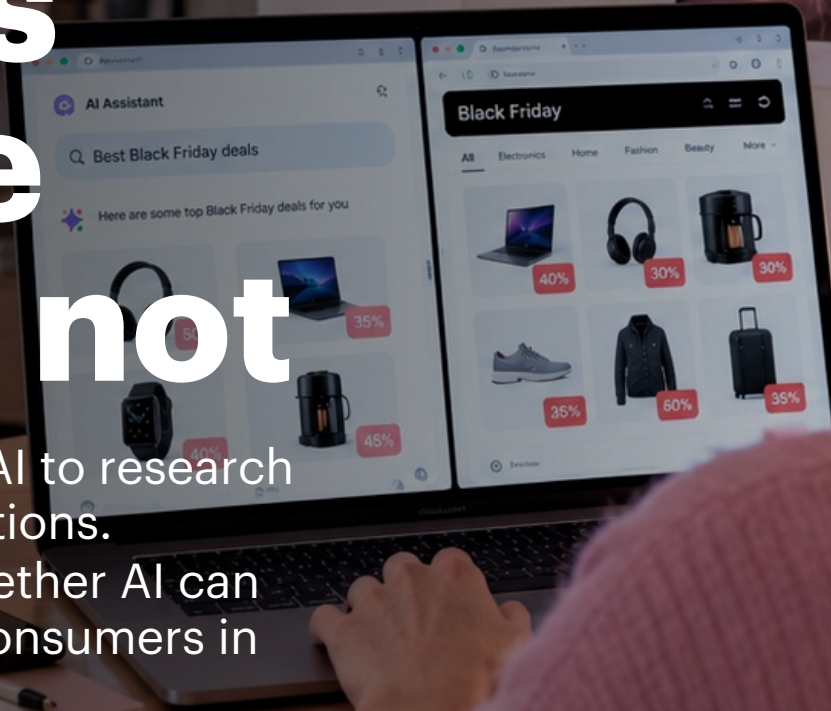
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Which AI tools, if any, would you be likely to use when shopping during major sales events? Please select all that apply. (likely BFCM shoppers)



Discovery is shifting, the checkout is not

Shoppers are more comfortable using AI to research and compare than to complete transactions. Building confidence will depend on whether AI can demonstrate accuracy while keeping consumers in control.



Shoppers want AI to assist, not make decisions

Likely BFCM shoppers are most comfortable using AI for research and deal-finding tasks. More than four in ten (43%) would be comfortable using it to find the best price, while 37% are comfortable with AI tracking price changes and 34% with comparing similar products or offers.

Comfort falls sharply as AI gets closer to completing the transaction. Just 9% would feel comfortable with AI adding items to their basket, 5% would be comfortable allowing it to complete a purchase after approval and 4% with letting it purchase without asking first.

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Which, if any, of the following would you be comfortable using an AI tool to help with during Black Friday/Cyber Monday? (likely BFCM shoppers)



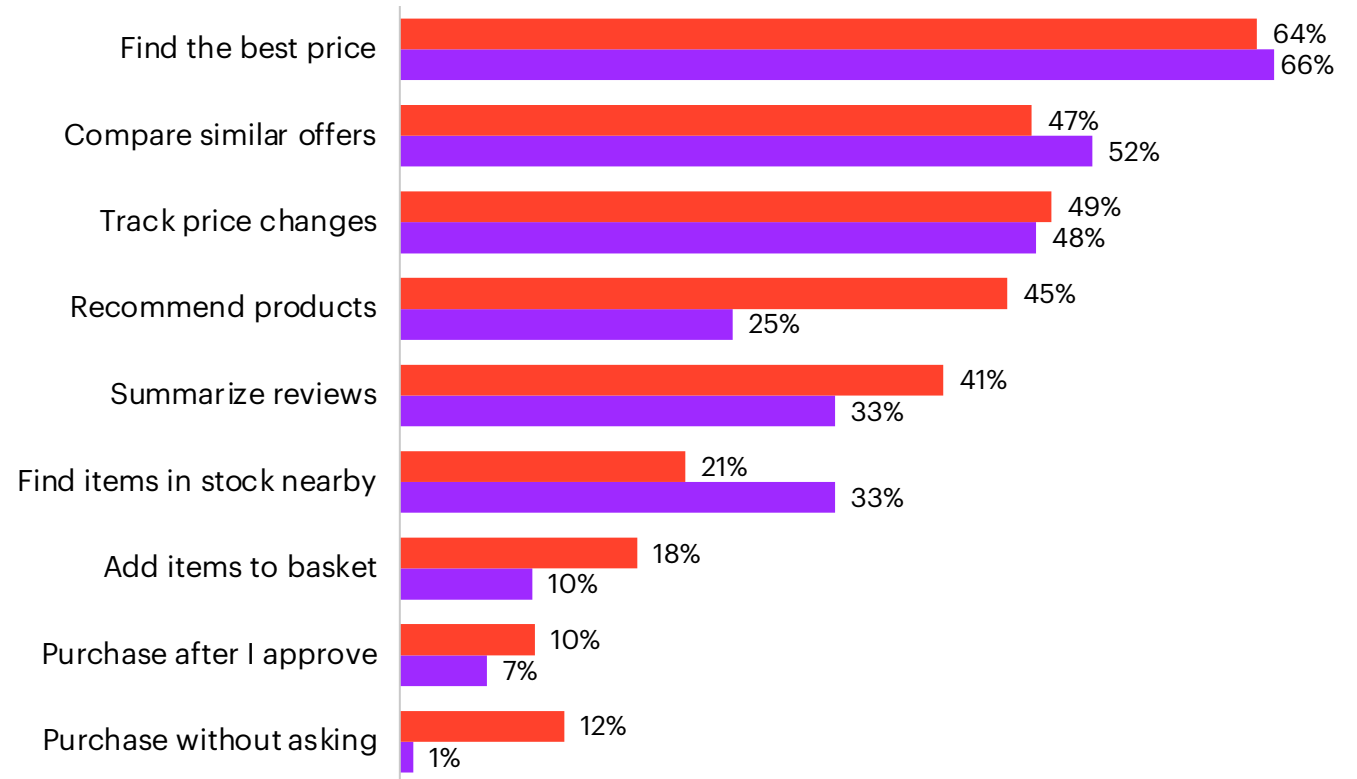
AI shoppers are more willing to delegate, but purchasing remains a boundary

AI shoppers are more comfortable than considerers letting AI add items to a basket (18% vs. 10%) or purchase without asking (12% vs. 1%).

Yet comfort with these tasks remains low in both groups. Finding the best price attracts much broader support, at 64% among AI shoppers and 66% among considerers.

Which, if any, of the following would you be comfortable using an AI tool to help with during Black Friday/Cyber Monday? (likely BFCM shoppers)

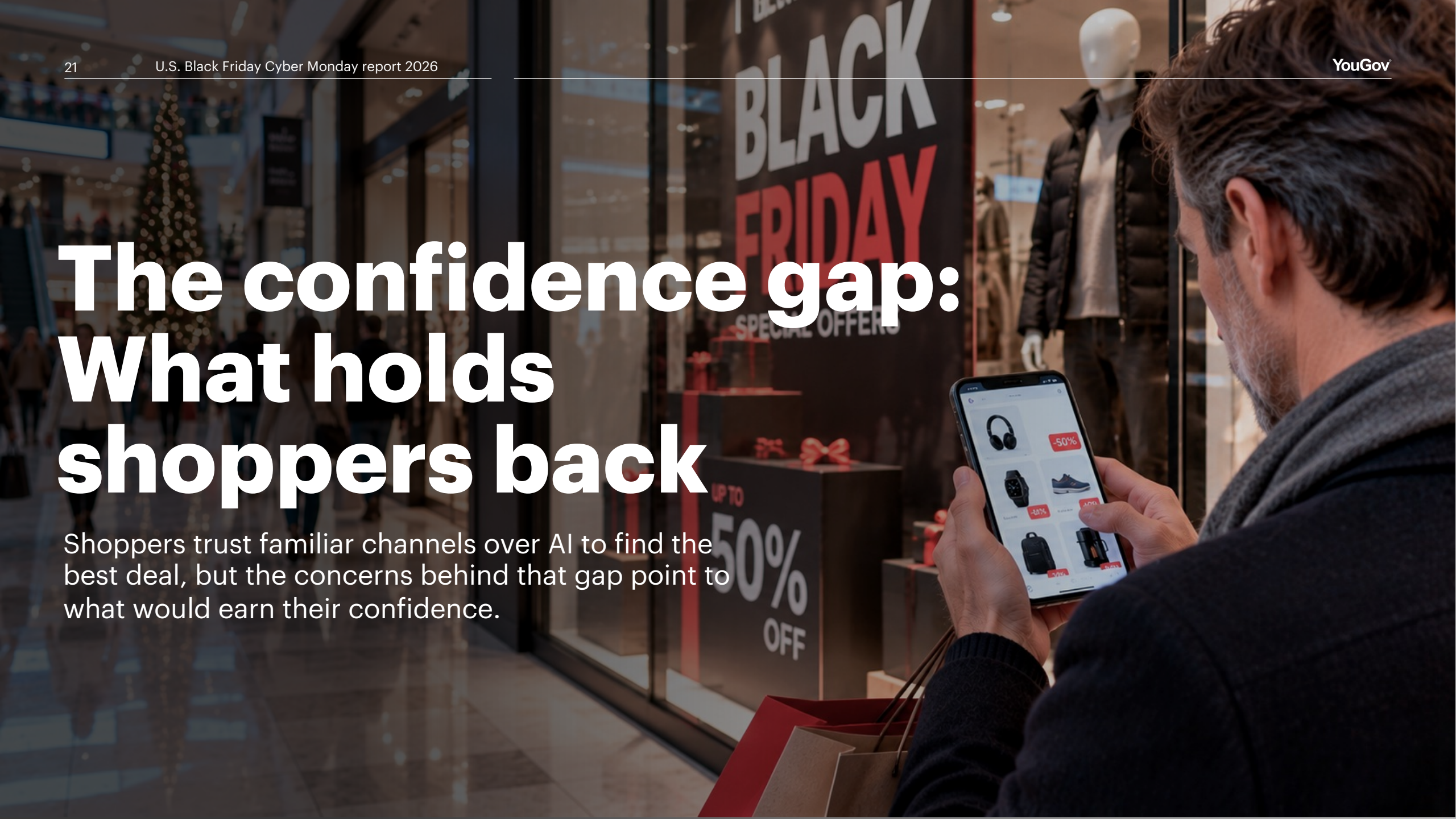
■ AI shoppers ■ AI considerers



YouGov Surveys, July 13, 2026 – August 11, 2026. BFCM shoppers: AI shoppers n> 100, AI considerers n> 150. Selected tasks shown.

The confidence gap: What holds shoppers back

Shoppers trust familiar channels over AI to find the best deal, but the concerns behind that gap point to what would earn their confidence.

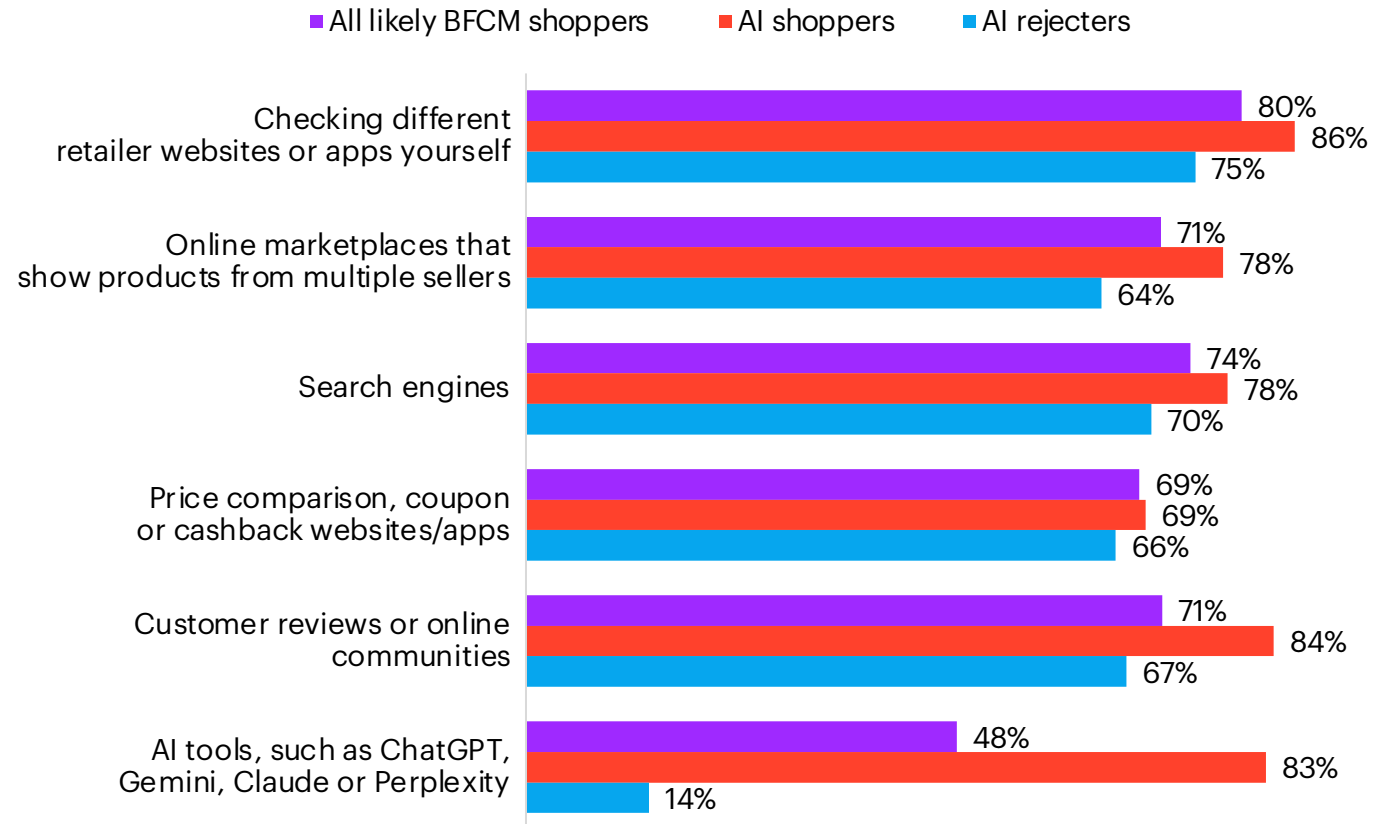


Credibility gap: AI is the lowest-confidence deal finder, especially among rejecters

On average, shoppers remain more confident in familiar ways of finding bargains than in AI tools. Among likely BFCM shoppers, 80% are confident that checking retailer websites or apps themselves will help them find the best deal. AI tools trail every other channel at 48%.

However, that average hides a split: 83% of shoppers who have used AI are confident in it, against 14% of those who reject it. This suggests that rejecters are not skeptical in general, but specifically about AI.

How confident are you that each of the following would help you find the best BFCM deal? Answered “very confident” or “fairly confident” (likely BFCM shoppers)



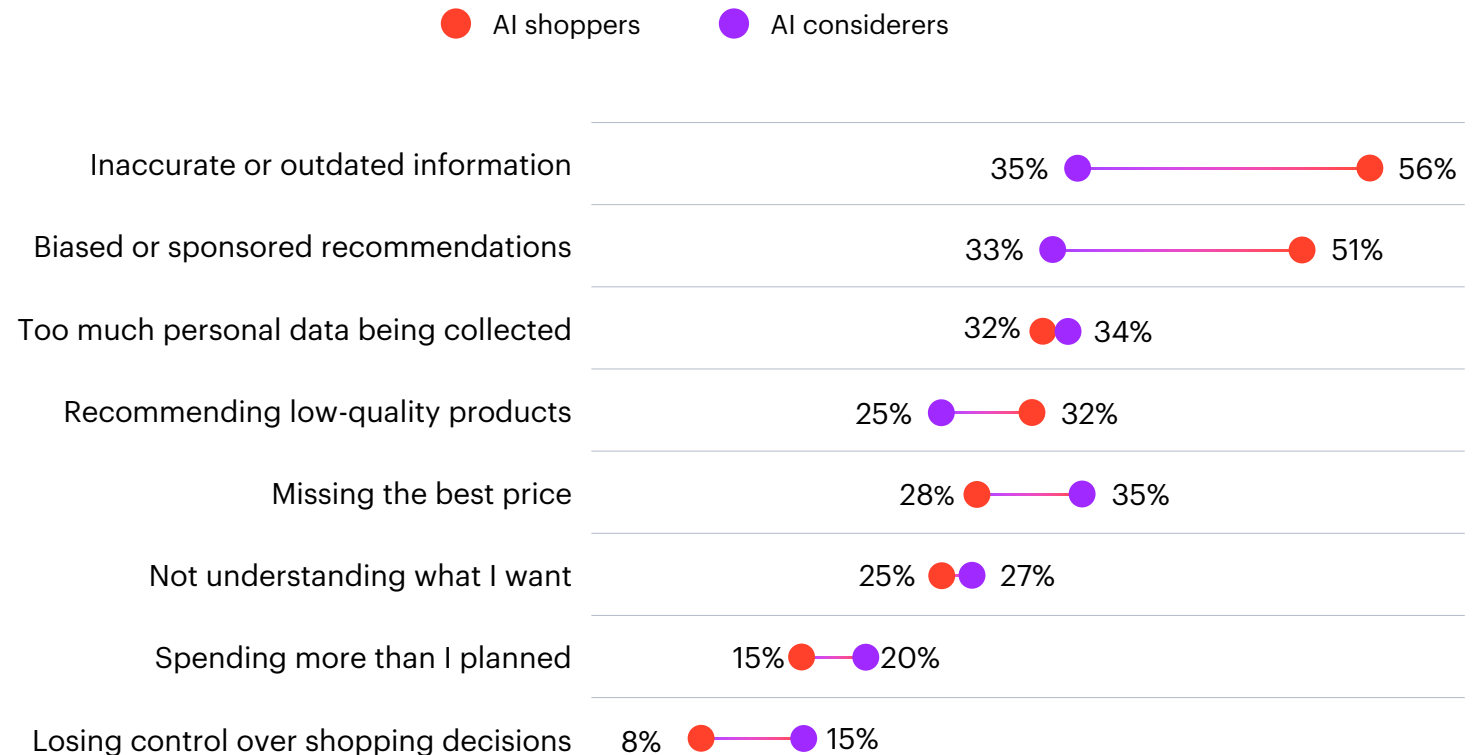
YouGov Surveys, July 13, 2026 – August 11, 2026. BFCM shoppers: All likely shoppers n> 500, AI shoppers n> 100, AI rejecters n> 200. AI considerers not shown.

AI users are more focused on accuracy and bias than considerers

AI shoppers are particularly concerned about the reliability and neutrality of AI: 56% cite inaccurate or outdated information and 51% cite biased or sponsored recommendations. Among considerers, those figures are 35% and 33%, respectively. On most other concerns, the two groups are closer.

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Which, if any, of the following would concern you about using AI to help shop during Black Friday/Cyber Monday? Please select all that apply. (likely BFCM shoppers)



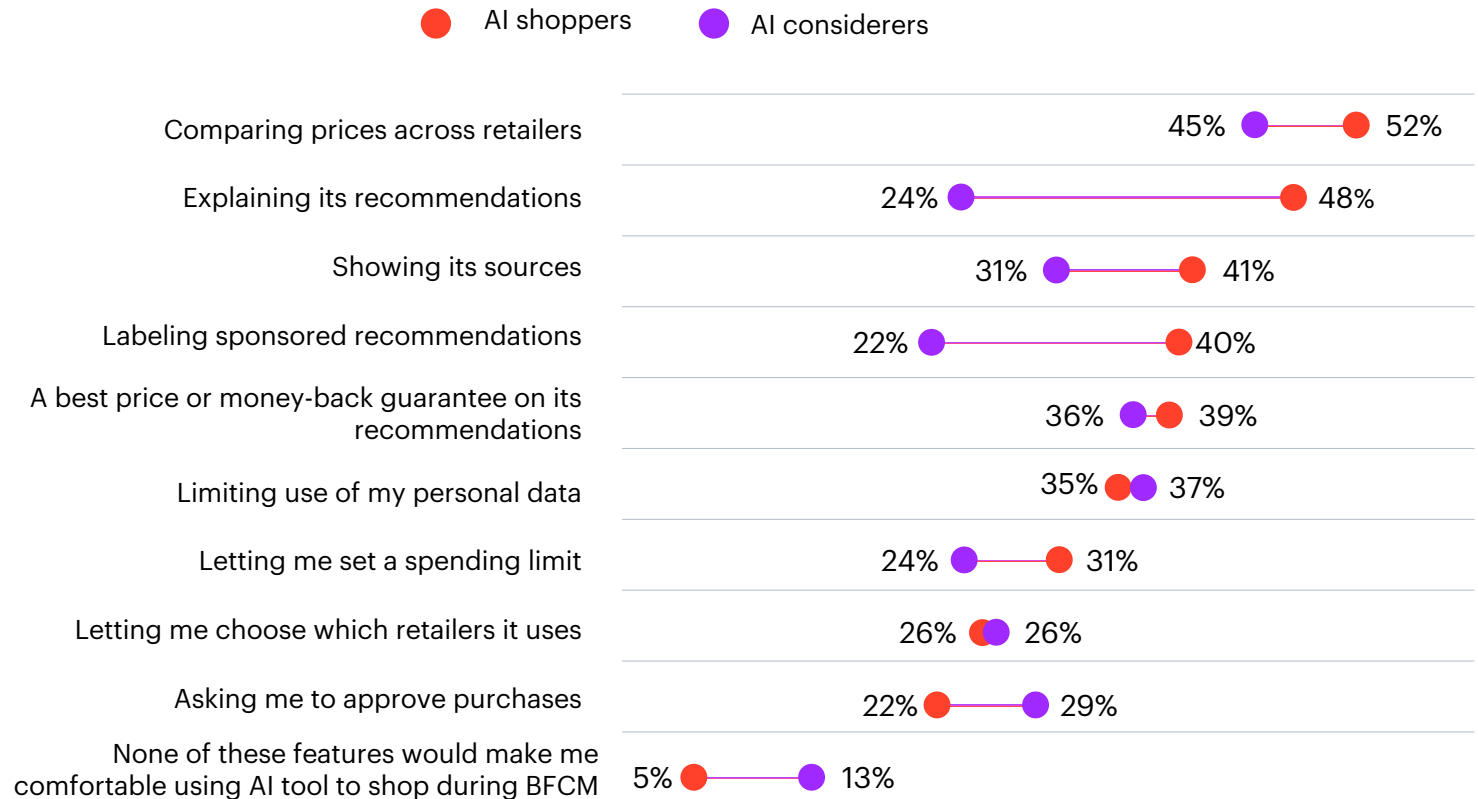
YouGov Surveys, July 13, 2026 – August 11, 2026. BFCM shoppers: AI shoppers n> 100, AI considerers n> 150. AI rejecters, "Others", "Don't know", and "Not applicable" responses not shown.

Transparency matters more to shoppers already using AI

Price comparison appeals to both AI shoppers and considerers (52% vs. 45%). But transparency features stand out more among people who already use AI: 48% want AI to explain its recommendations, 41% want it to show its sources and 40% want sponsored recommendations clearly labeled.

Control features show less separation between the groups. Limiting personal data, offering a best-price guarantee and allowing shoppers to choose which retailers AI uses attract similar levels of interest.

Which, if any, of the following features of an AI tool would make you more comfortable using it to help shop during Black Friday/Cyber Monday? (likely BFCM shoppers)



YouGov Surveys, July 13, 2026 – August 11, 2026. BFCM shoppers: AI shoppers n> 100, AI considerers n> 150. AI rejecters and “Don’t know” responses not shown.

Activate the audiences that matter during Black Friday and Cyber Monday 2026

Define your perfect audience group, then reach them with confidence

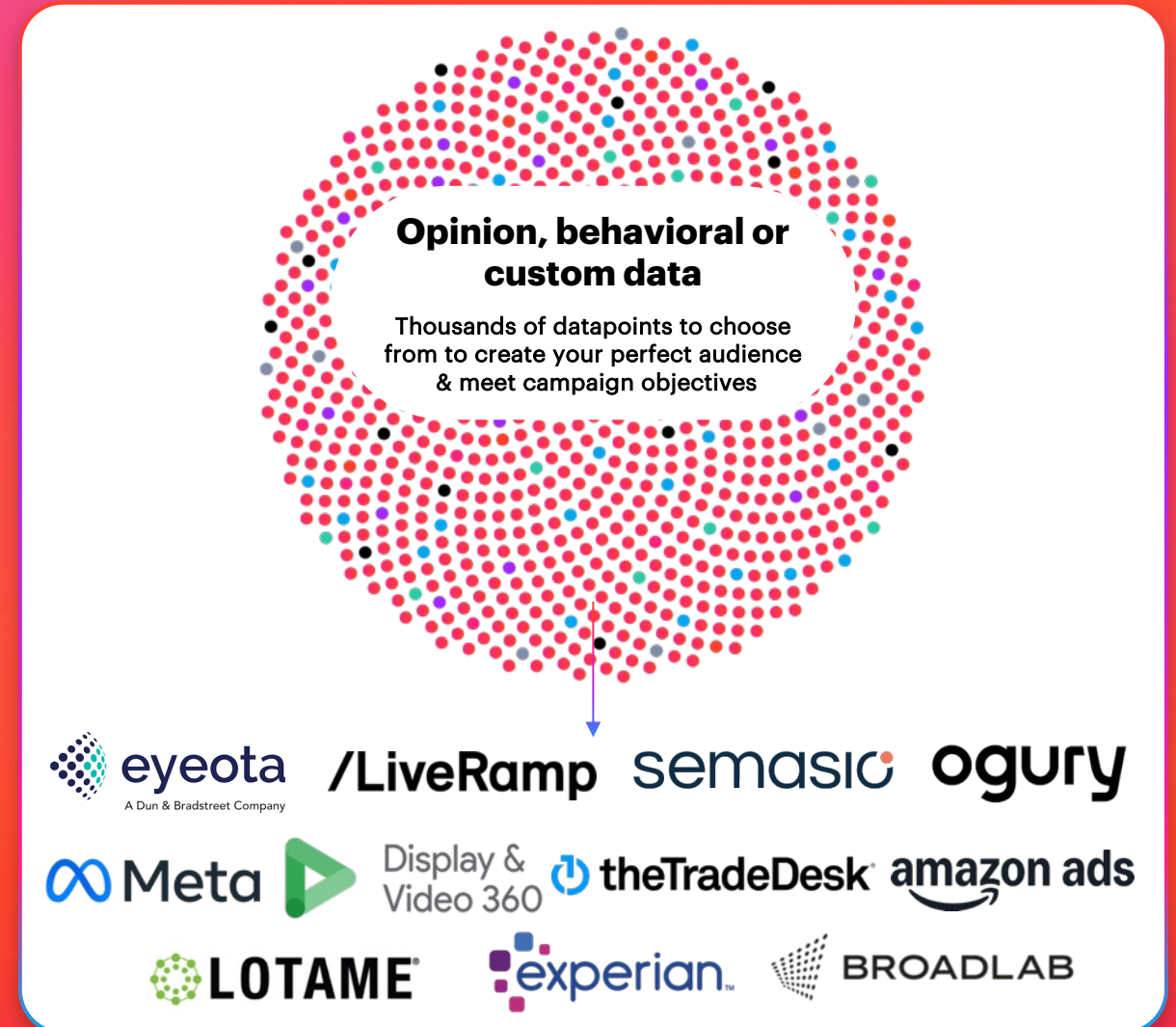
Once you've defined your audience, the real work starts - reaching them when and where it matters.

With YouGov, your audiences are built from real people and real behaviors - whether they're luxury shoppers or holiday gift buyers.

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Methodology

The insights in this report have been sourced via YouGov Surveys: Serviced – providing rapid answers from the right audience.

- All figures, unless otherwise stated, are from YouGov Plc. The multi-region survey was conducted online from July 13, 2026 – August 11, 2026.
- Australia n= 956, Canada n= 993, Denmark n= 1006, France n= 977, Germany n= 1014, Great Britain n= 2039, Hong Kong n= 498, India n= 988, Indonesia n= 989, Italy n= 1034, Mexico n= 978, Poland n= 986, Saudi Arabia n= 987, Singapore n= 1016, Spain n= 996, Sweden n= 1001, Switzerland n= 989, U.S. n= 1495, UAE n= 976. The figures have been weighted to be representative of adults aged 18+ in each market's respective target population.
- Audiences are nationally representative in Australia, Canada, Denmark, France, Germany, Great Britain, Italy, Poland, Saudi Arabia, Singapore, Spain, Sweden, Switzerland, the U.S., and the UAE. Audiences in India and Mexico are representative of the urban population and those in Hong Kong and Indonesia are representative of the online population.
- Throughout the report, each generation is defined as: Gen Z (1997 or later), Millennial (1981-1996), Gen X (1965-1980) and Baby Boomers+ (Pre-1964).
- BFCM shoppers are respondents who answered "Somewhat likely" or "Very likely" when asked how likely they are to make purchases during Black Friday or Cyber Monday.
- AI shopping segments are based on the question, "Which, if any, of the following best describes your experience using AI tools when shopping?".
 - 'AI shoppers' are those who selected "I have used AI tools to help me shop, including anything from telling me about products to completing a purchase"
 - 'AI shopping considerers' are those who selected "I have not used AI tools to help me shop, but I would consider doing so"
 - 'AI shopping rejecters' are those who selected "I have not used AI tools to help me shop, and I would not consider doing so"

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The insights in this report are fueled by YouGov's consumer research panel, which has 34 million registered members from 55+ markets.

Every day, our members share their realities with us – enabling true insights into behaviors and attitudes from people of all ages, backgrounds and beliefs.

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This dedication to reflecting reality means we're cited as the most accurate online pollster regularly.

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34m
registered
panel members

55+
markets



Thank you

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