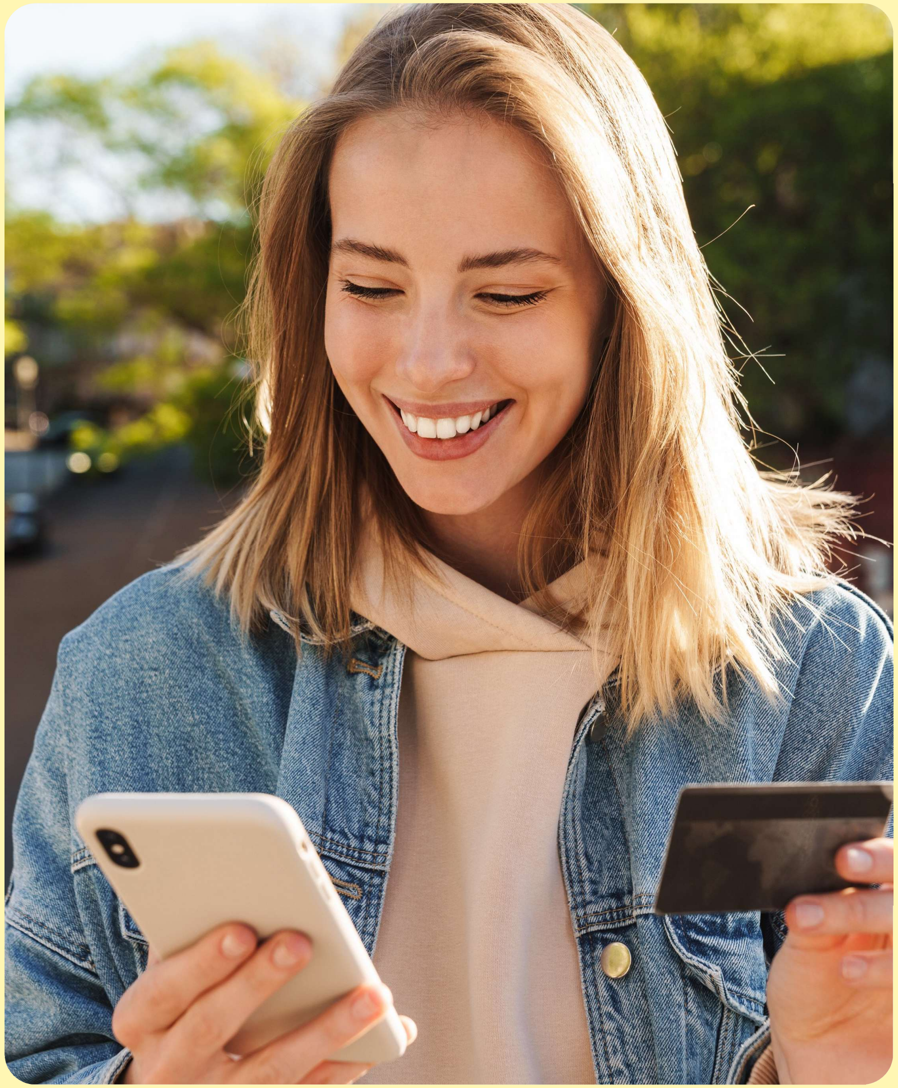
PRESS MATERIAL

Sinch Black Friday Cyber Monday Survey 2026

What do consumers expect from brands during the 2026 holiday season?

BFCM CONSUMER SURVEY 2026

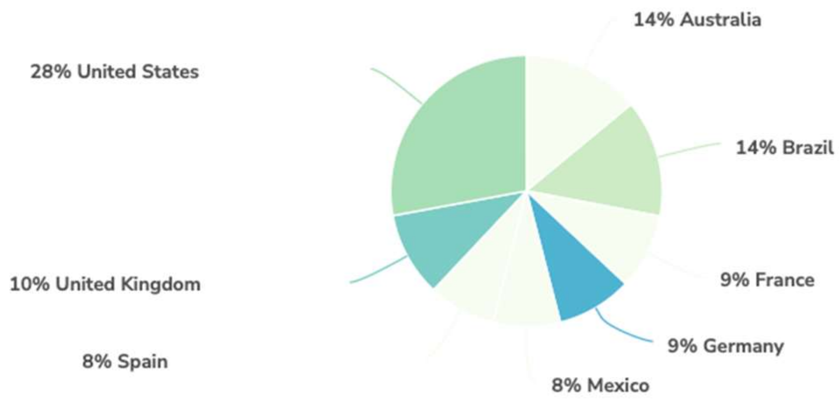
Demographics



Where respondents live

2,501 respondents across eight countries

1. In what country are you currently located? Please select from the dropdown menu. (Note: Start typing your country to jump to it on the list.)



Results from 8 countries

**Note that India and Canada were excluded from this year's sample*

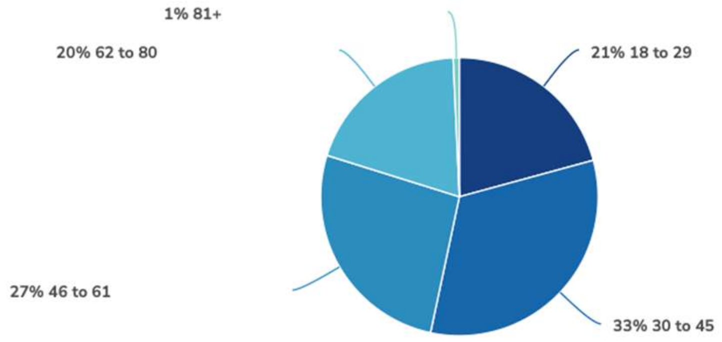
- United States – 698
- Australia – 351
- Brazil – 350
- United Kingdom – 252
- France – 225
- Germany – 225
- Mexico – 200
- Spain – 200

Source: BFCM Report 2026, Question 1

Generation breakdown

Respondents skew toward the 30–45 age group, with solid representation across every generation.

2. In which age group do you belong?



Respondents aged between 18 and 81+

**Note that Silent Generation (81+) sample is too small to extract valuable insights from – 17 / 0.7%*

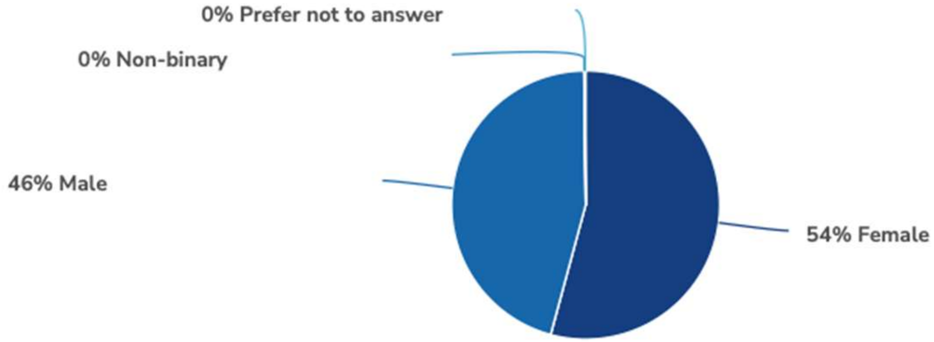
- Gen Z (18 to 29) – 519
- Millennials (30 to 45) – 816
- Gen X (46 to 61) – 662
- Boomers (62 to 80) – 487
- Silent Gen (81+) – 17

***Source:** BFCM Report 2026, Question 2*

Gender split

A near-even split between female and male respondents.

3. What gender do you identify as?



Male, female and non-binary respondents

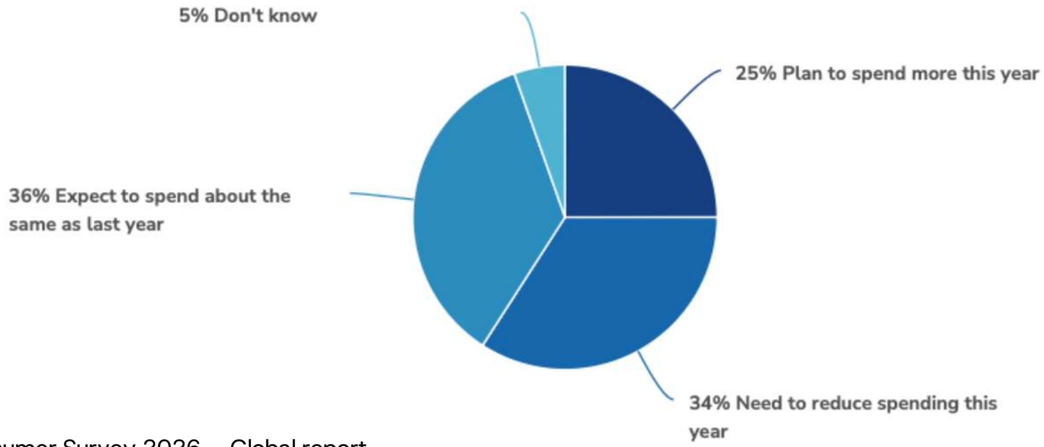
- Female – 54%
- Male – 46%
- Non-binary – 0.1%
- Prefer not to answer – 0.1%

Source: BFCM Report 2026, Question 3

Expected spend during BFCM 2026

More consumers are cutting back than spending more

4. Which of the following best describes your household's plans for spending throughout the traditional holiday shopping season?



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Spending intent

- Plan to spend more – 25%
  (–7pp vs 2025*)
- Plan to spend less – 34%

**Excluding India (and Canada) this year has made this drop more significant*

Spending intent is down slightly from last year with a third planning to spend less this holiday season. Tighter budgets make it more important than ever to get each message right.

Source: BFCM Report 2026, Question 4

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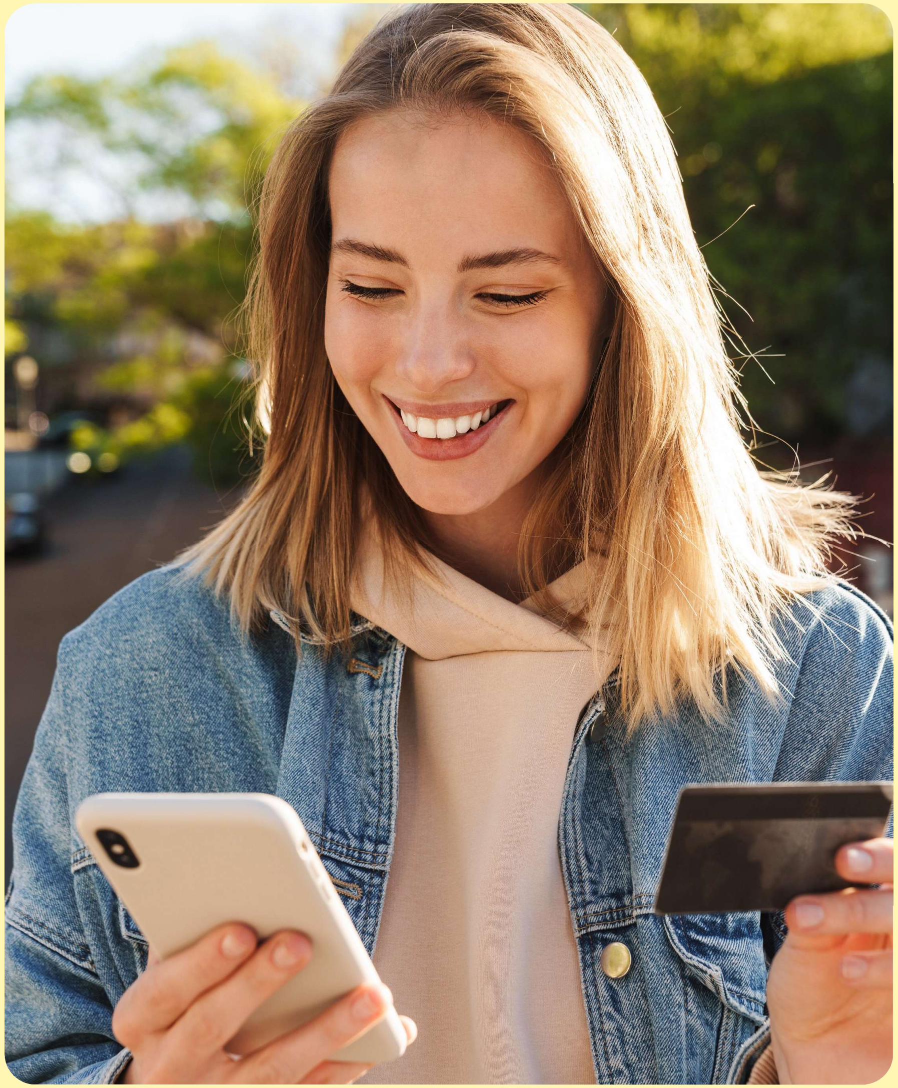
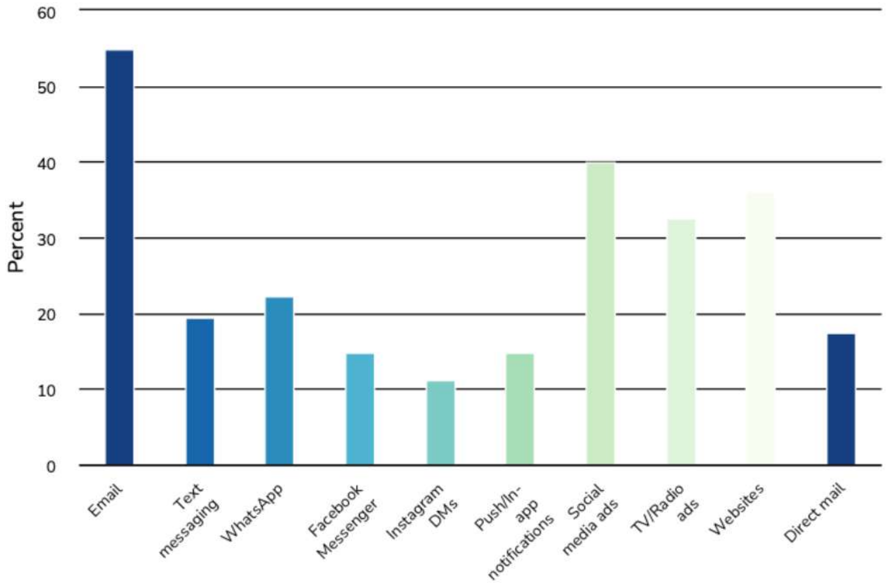
Brand communication preferences



Preferred promo channels

A third now prefer to be contacted through just one channel, but there's a lack of consensus on which one to use.

5. How do you prefer to hear from brands about Black Friday, Cyber Monday, and other holiday season deals? (Select all that apply)



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Top channels for promo messages

- Email – 55%
- Social media ads – 40%
- Websites – 36%

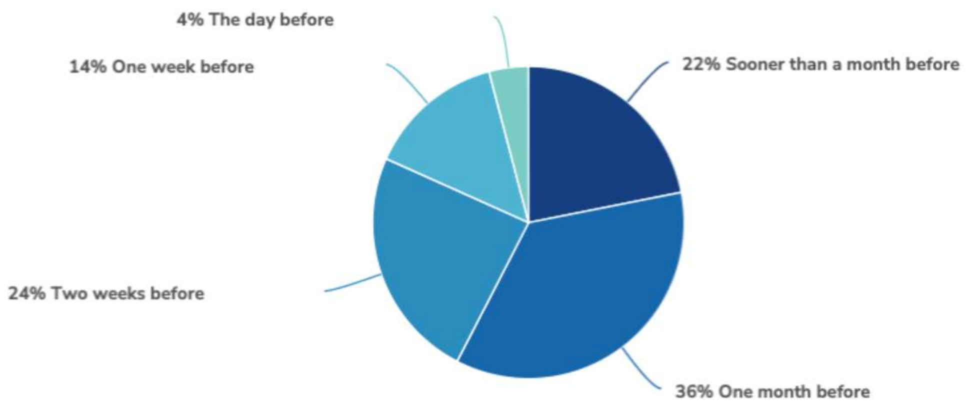
- Of those that select one channel only, email is that channel for only 37% of them – The remaining 63% were spread across nine alternatives, none reaching 15%. It's important brands continue to cover the rest of the channels, but they should adapt to the optimal channel for each customer.

Source: BFCM Report 2026, Question 5

How soon do people want to hear about BFCM deals

Most consumers want to start hearing from brands at least one month before.

6. How soon before a promotion begins do you want to start hearing from brands about Black Friday and Cyber Monday deals?



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When consumers want BFCM messaging to start

- At least one month before – 58%
- One month before – the most popular choice

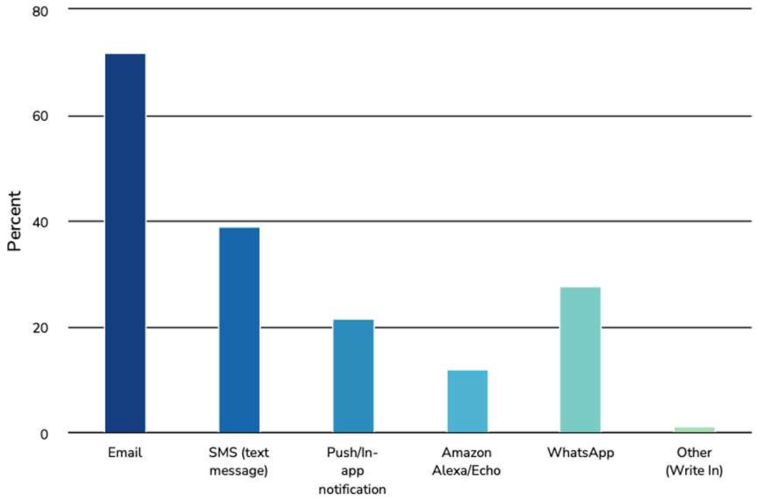
Brands should take note that 58% want BFCM messaging to start at least one month before. As many as 82% expect it to start at least two weeks out so if you're leaving it to the day of to promote your deals, it's too late.

Source: BFCM Report 2026, Question 6

Preferred transactional channels: Part 1/2

Consumers prefer email for important updates

7. How do you prefer to receive transactional messages such as order confirmations, delivery notifications, and shipping updates during the holiday shopping season? (Select all that apply)



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Top channels for transactional messages

- Email – 72%
- SMS – 39%
- WhatsApp – 28%

49% of people prefer to receive updates through more than one channel. Email is critical but brands must adapt to preferences.

Source: BFCM Report 2026, Question 7

Preferred transactional channels: Part 2/2

Email is preferred globally but the consensus does not hold in every region

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Regional view of top channels for transactional messages

- WhatsApp outranks email in Mexico and Brazil

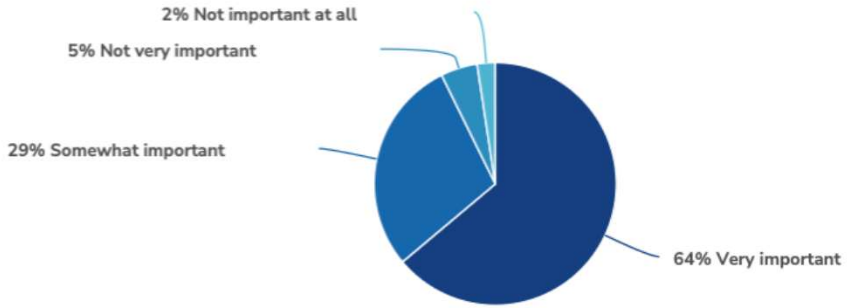
While the global preference is email, this varies by region and brands should adapt to the optimal channel for each consumer and region.

Source: BFCM Report 2026, Question 7

Importance of shipping updates

Shipping and tracking messages considered very important

8. During the holiday shopping season, how important are messages containing shipping updates and order tracking to your customer experience?



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How important shipping updates are to consumers

- Important – 93%
- Very important – 64%

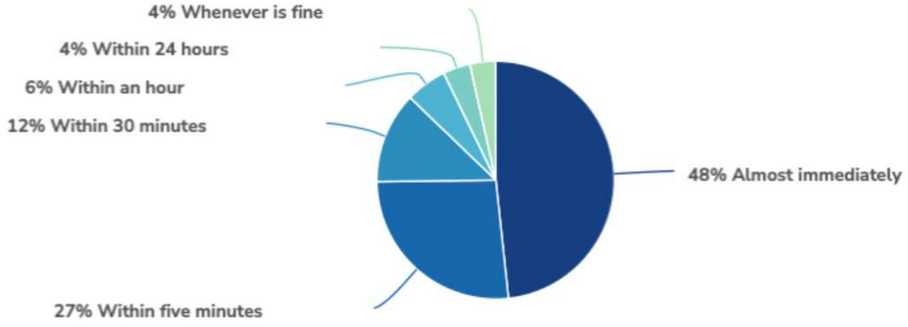
Shipping and tracking messages are vital to the customer experience and should be prioritized.

Source: BFCM Report 2026, Question 8

Speed of order confirmation

Nearly three-quarters of shoppers expect confirmation within five minutes of checkout

9. After placing an online order during Cyber Week shopping, how soon do you expect to receive a message confirming your order?



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How soon after purchase customers expect order confirmation

- Within five minutes – 75%
- Almost immediately after – 48%

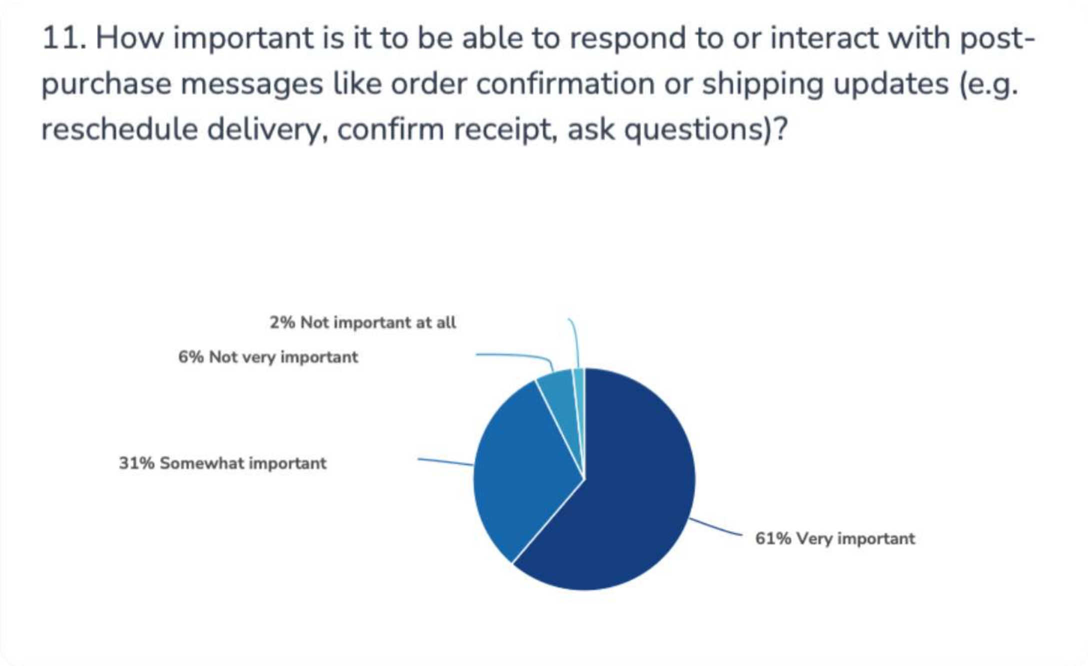
- **Over half** of Millennials expect order confirmation almost immediately

Customer update messages are critical during the holiday season and vital to the customer experience. Consumers expect them shortly after they purchase. If your provider can't scale to deliver during this period, you're failing your customers.

Source: BFCM Report 2026, Question 9

New Value of interactive updates

Most shoppers now expect two-way, actionable post-purchase messages.



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Importance of ability to interact with messages post-purchase

- Important – 93%
- Very important – 61%

Interactive updates are in high demand, highlighting the value of conversational experiences during peak shopping moments.

Source: BFCM Report 2026, Question 11

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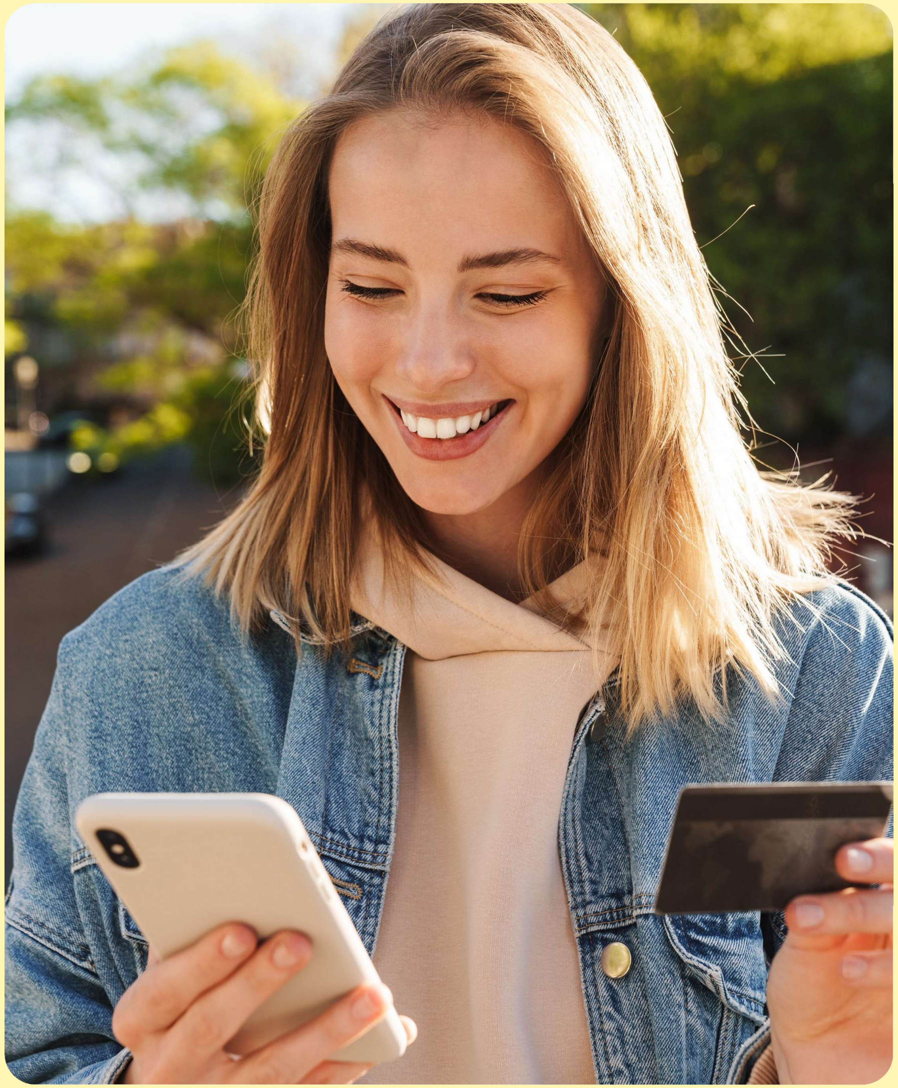
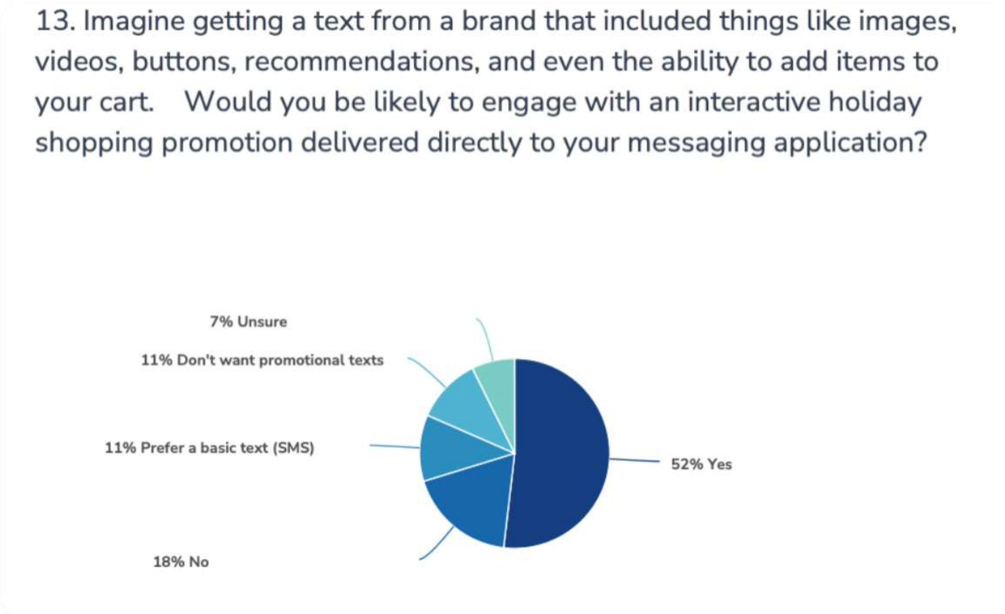
Emerging forms of brand communications



Interactive message engagement

Over half of consumers now want richer, interactive messaging – an opening for RCS and WhatsApp.



Likelihood of engaging with interactive message

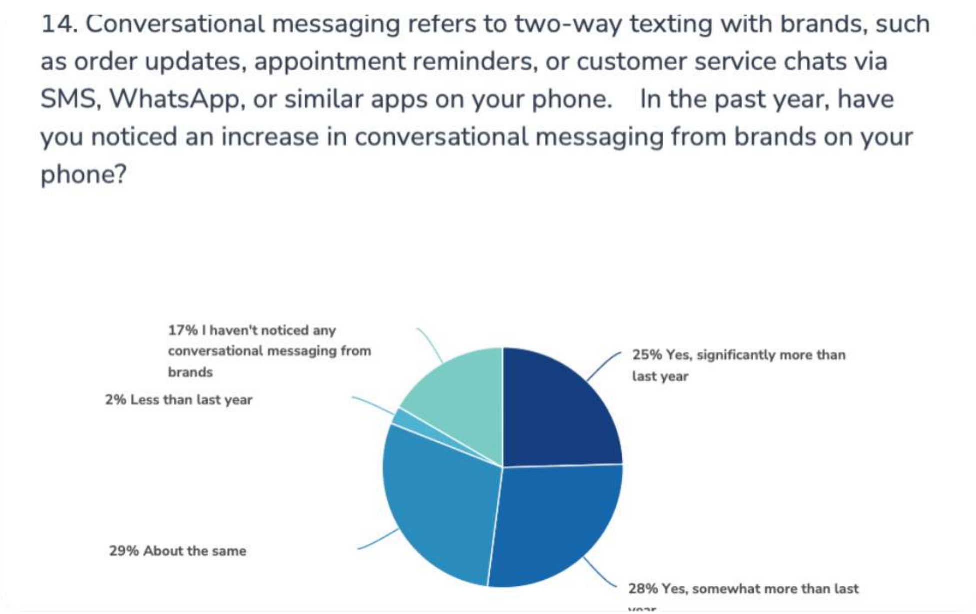
- Likely to engage with interactive messages sent to their phone (RCS) – 52% (+5pp vs 2025)
- Prefer a basic text – 11% (–5pp vs 2025)

Brands should respond to consumer appetite for more interactivity this year

Source: BFCM Report 2026, Question 13

New Q Conversational messaging is up

Over half of consumers have noticed more conversational, two-way messaging this past year



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Number of people who noticed an increase in conversational messaging in the past year

- Noticed an increase in conversational messaging from brands vs last year – 52%

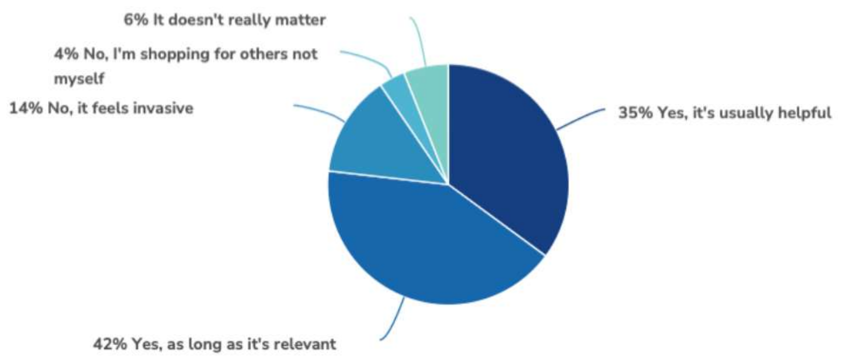
Conversational messaging is becoming more standard and will be expected.

Source: BFCM Report 2026, Question 14

Appetite for personalization

The appetite for personalization is up again this year, especially among those receiving richer experiences.

12. Do you value receiving personalized recommendations from brands during Cyber Week and the holiday shopping season? Choose the option that best reflects your opinion and experience with personalization.



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Value of personalized messages

- Want personalized messages – 77% (+4pp vs 2025)
- Want them if relevant – 42%
- They feel invasive – 14%

Consumer appetite for personalization is up from last year. Those that report an increase in conversational messaging on their phones are also more positive towards personalization messages.

Source: BFCM Report 2026, Question 12

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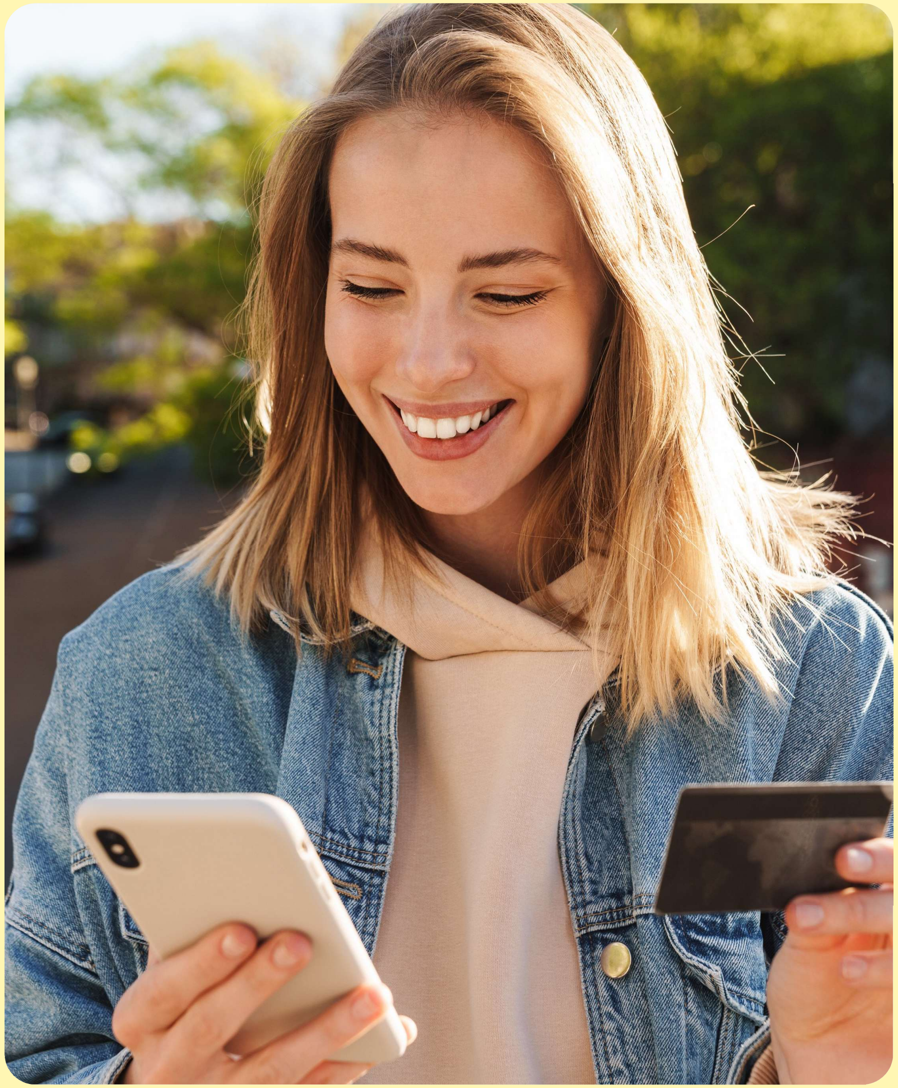
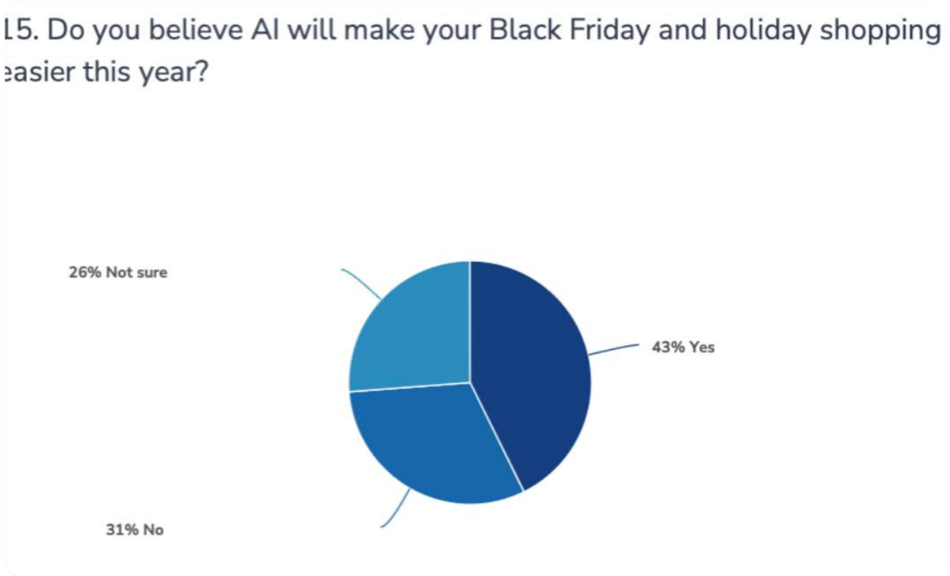
AI confidence and sentiment



Will AI ease BFCM shopping?

Optimism about AI edges out scepticism, but is down from 2025.



AI optimism

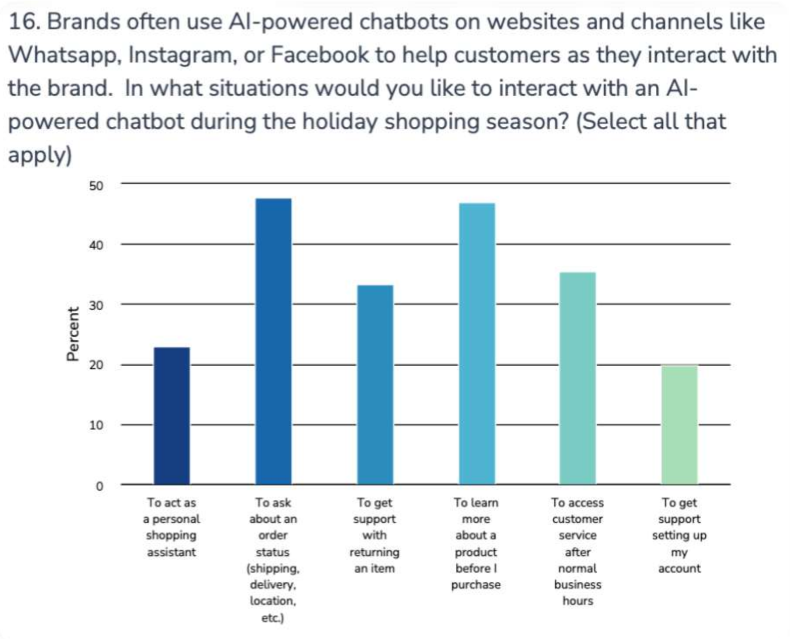
- Think AI will make their holiday shopping easier this year – 43% (-5pp vs 2025)
- Don't think AI will make it easier – 31%
- Aren't sure – 26%

More people believe AI will help them with their shopping this year than not, but skepticism is up year-over-year. Brands should be mindful of the growing hesitation and make efforts to prove value and build trust through more transparent use.

Source: BFCM Report 2026, Question 15

Best use cases for AI chatbots

Chatbots are welcomed for practical tasks, but less so for more complex use cases that typically use human support.



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When consumers would like to interact with AI chatbots

- Order tracking – 48%
- Learn more about a product pre purchase – 47%

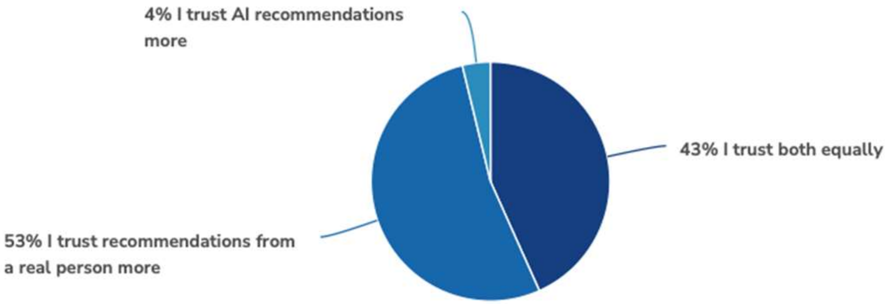
People are more hesitant to use AI chatbots for complex use cases but everyone wants to use them for something. Brands should focus on identifying high-value opportunity for the AI chatbot developments.

Source: BFCM Report 2026, Question 16

Trust: AI vs human advice

Human advice still holds the edge over AI.

17. How much do you trust product recommendations from AI chatbots compared to those from a real person?



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Trust for AI product recommendations

- Trust recommendations from a real person more – 53%

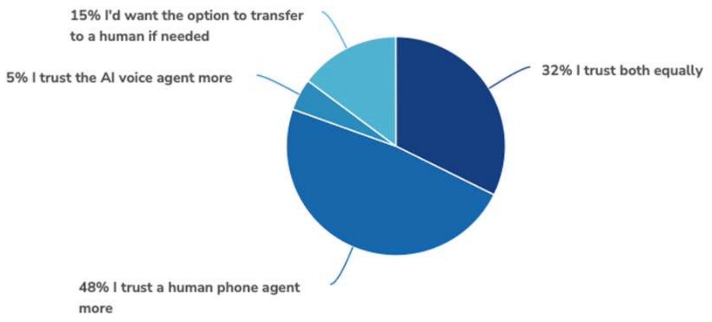
Over half say they trust human recommendations more than AI, slightly up from 2025. Brands must focus on overcoming AI skepticism, building trust, and balancing AI and human connection.

Source: BFCM Report 2026, Question 17

New Q Trust in AI voice agents

Voice is where AI trust lags most, and a human fallback option is essential.

18. Some brands now offer AI voice agents – not traditional automated phone menus, but AI that can hold a natural conversation to help with order tracking, returns, or account questions over a phone call. During Black Friday or the holiday season, how much do you trust an AI voice agent to resolve your issue compared to a human phone agent?



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Trust in AI voice agents

- Trust human phone agents more overall – 48%

Almost half say they'd trust a human phone agent over an AI one. But, 52% are actually open to AI voice agents, provided they allow for effective transfer to a human. Brands should focus on ensuring transparency around AI use and implementing effective flows that identify when a human is needed.

Source: BFCM Report 2026, Question 18

New Q AI confidence by task

Consumer confidence in AI assistants is high, but drops as the task gets closer to money and account security.

19. How confident are you that a brand's AI-assistant (like an AI-powered chatbot or voice assistant) can handle the following?

	Very confident	Somewhat confident	Not very confident	Not confident at all	Responses
Pre-purchase questions (sizing, availability, compatibility) Count Row %	687 27.5%	1,168 46.7%	422 16.9%	224 9.0%	2,501
Order tracking and shipping updates Count Row %	922 36.9%	1,094 43.7%	297 11.9%	188 7.5%	2,501
Account changes (shipping/billing address, communication preferences) Count Row %	658 26.3%	997 39.9%	590 23.6%	256 10.2%	2,501
Payment/billing changes (updating card, redeeming a gift card) Count Row %	626 25.0%	917 36.7%	614 24.6%	344 13.8%	2,501
Totals Total Responses					2501

Confidence in AI assistants

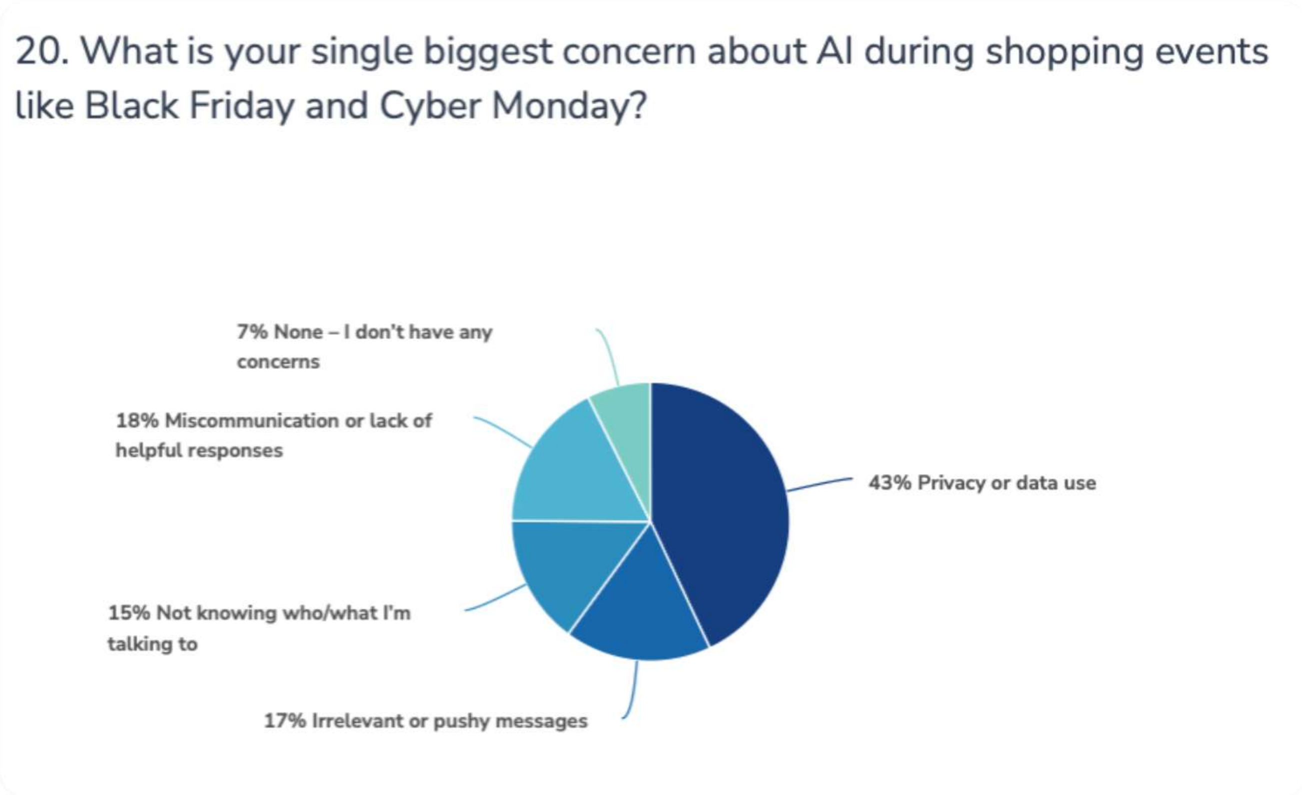
- Order tracking and shipping updates
  - Confident – 81%
- Pre-purchase questions
  - Confident – 74%
- Account changes
  - Confident – 66%
- Payment/billing changes
  - Confident – 62%

Not all tasks should be treated equally when it comes to deciding on AI assistance

Source: BFCM Report 2026, Question 19

Top AI concerns

Privacy is by far the top AI concern



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Top AI concerns

- Privacy or data use – **43%**
- No concerns – **7%** (−2pp vs 2025)

Privacy/data use has stayed a consistently top concern and only 7% have no concerns, slightly down from 2025. Any AI strategy needs clear data trust.

Source: BFCM Report 2026, Question 20

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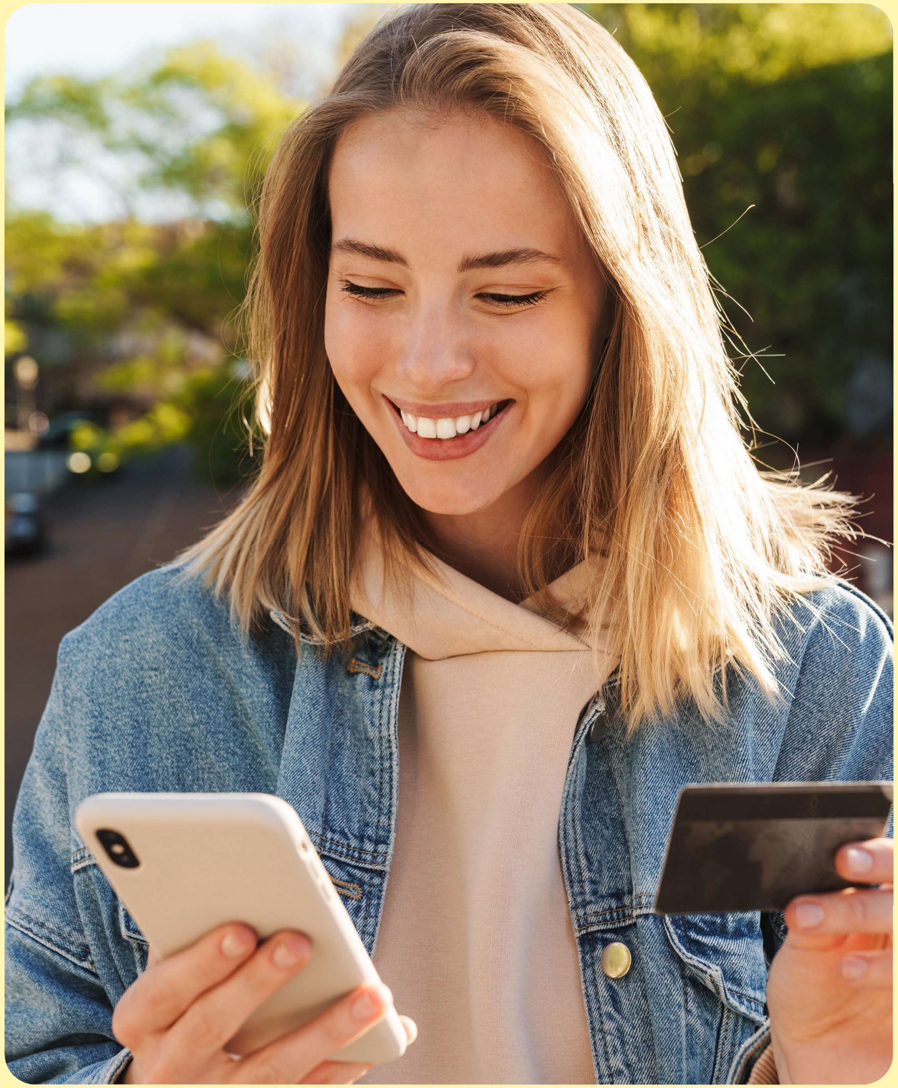
Comparisons vs 2025

YoY comparisons between 2025 and 2026.



Main YoY differences: Spend & channel preference

Key movements between 2025 and 2026

- Plan to increase holiday spend decreases (–7pp)
  - Consumers are more conservative in their spending plans this year. Fewer people plan to increase their spending.

- Preference for more than one channel for promotional messaging is down
  - Preference for multiple channels has dipped again, indicating that consumers are becoming more selective.

- Preference for more than one channel for transactional messaging is down (–3pp)
  - Consumers are also becoming more selective in transactional messaging preferences but email still rules overall.

Main YoY differences: Interactivity, personalization & AI sentiment

Key movements between 2025 and 2026

- Interest in interactive (RCS/WhatsApp-style) messaging increased (+5pp)
  - Preference for basic SMS fell from 16% to 11%.

- Interest in personalized messages has gone up (+4pp)
  - Those finding them invasive fell to 14%.

- Conversational messaging awareness is up (52%)
  - Over half noticed an increase in conversational messaging from brands vs last year.

- AI optimism is down (−5pp)
  - Fewer people think AI will make holiday shopping easier

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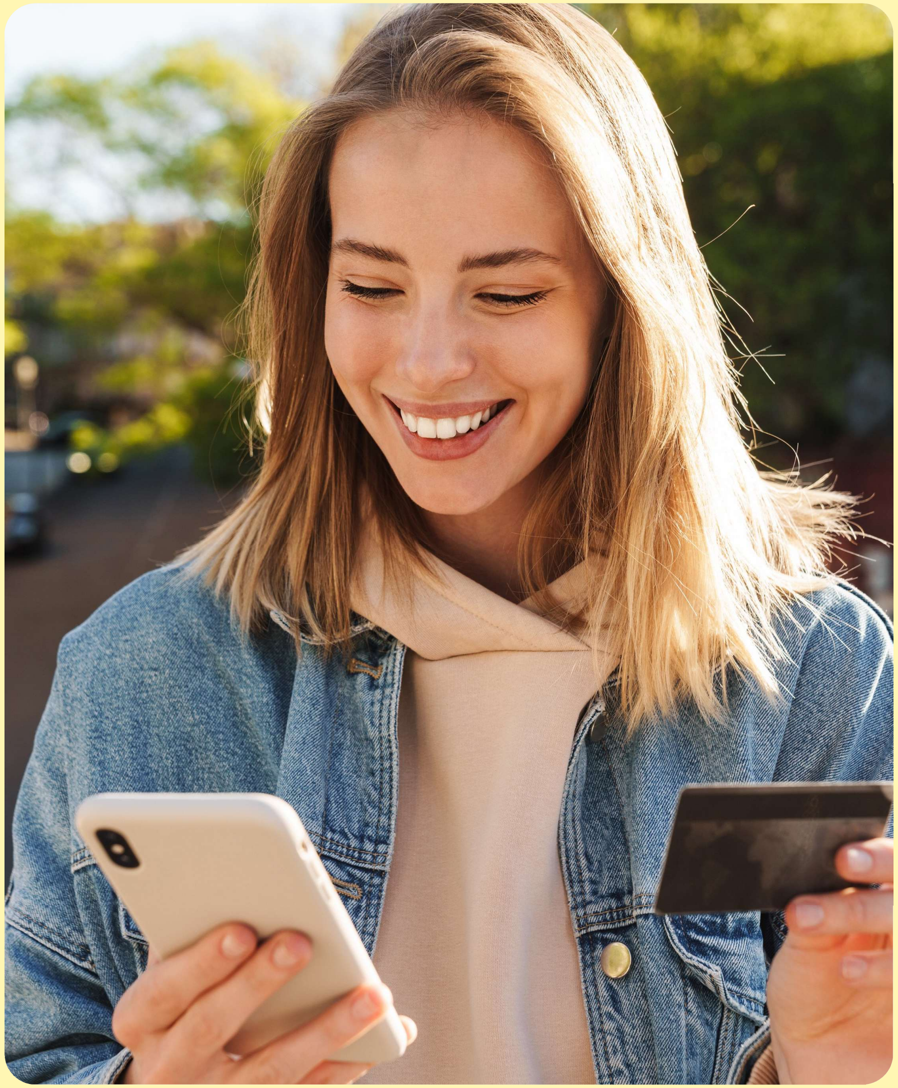
Comparisons between generations

Comparisons between Gen Z, Millennials, Gen X, and Boomers



Generational differences: channels & speed

Younger shoppers lean on social channels, and expect order confirmation fastest

- Gen Z's top channel for promotions is social ads.
  - 58% of Gen Z prefer social ads. 49% of Gen Z prefer email.

- Millennials are the most impatient group
  - 53% of Millennials expect order confirmation immediately, compared to 39% of Boomers.

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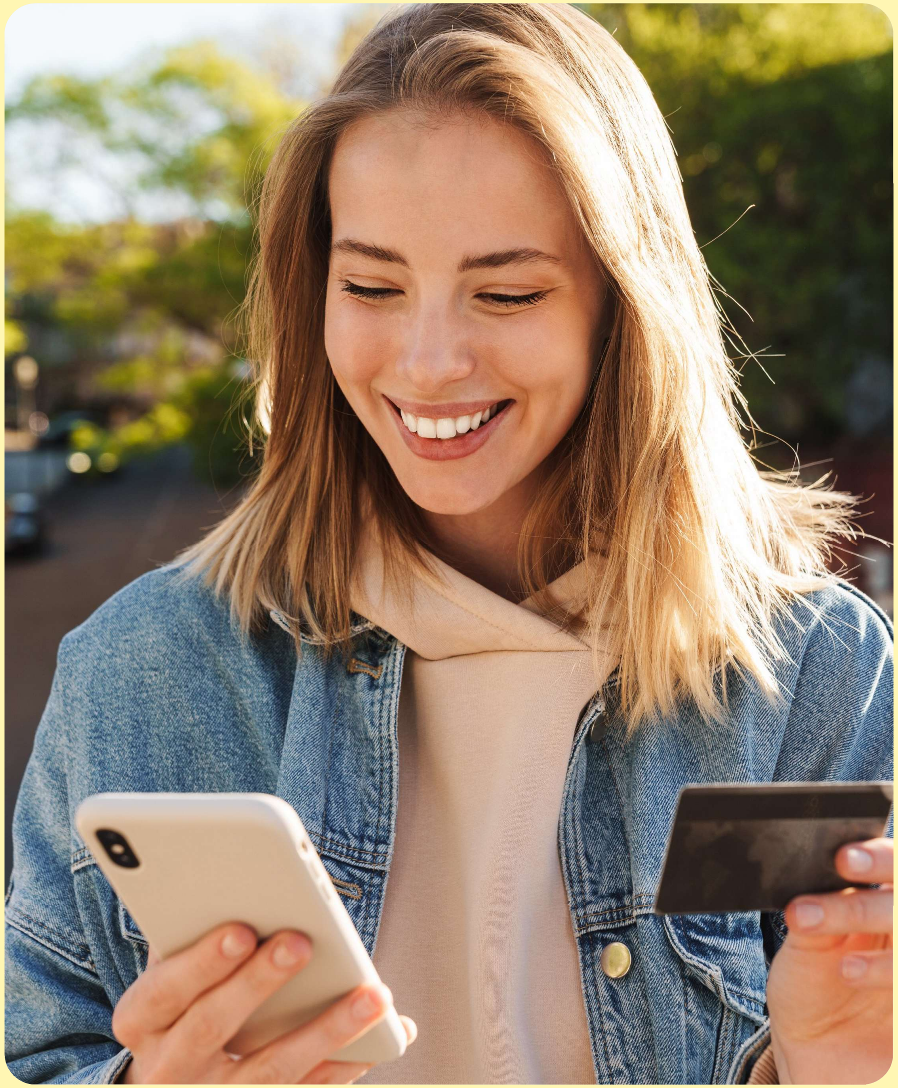
Comparisons between regions

Comparisons between Europe, North America, LATAM and APAC regions



Regional differences

Top findings by region, as published in the BFCM 2026 blog

Europe (UK, France, Germany, Spain)

- **Spending is the most divided.** 23% plan to spend more. 42% of UK shoppers need to cut back, against 25% in France.
- **Email is the constant.** 54% want promotions by email and 72% want order updates there. France is the most email-led market at 64%.
- **The widest internal variation.** Appetite for interactive messaging runs from 32% in Germany to 67% in Spain.
- **AI interest is conditional.** 39% think AI will make shopping easier and 49% would engage with interactive messaging. 19% name AI transparency as their top concern, the highest of any region.

North America (US)

- **Spending is stable.** 42% expect to spend about the same as last year. 18% plan to spend more, against 25% globally.
- **Email dominates both promotions and updates.** 63% want promotions by email and 82% want order updates there, the highest transactional email preference of any region.
- **AI skepticism is the highest anywhere.** Just 26% think AI will make their shopping easier, 17 points below the global average.

LATAM (Brazil, Mexico)

- **Spending is the most confident.** 39% plan to spend more. It is the only region where more shoppers plan to increase their spending than reduce it.
- **WhatsApp is the number one transactional channel.** 68% want order updates on WhatsApp and 57% by email, the only region where WhatsApp beats email.
- **AI confidence is the highest anywhere.** 72% think AI will make shopping easier and 61% trust AI recommendations as much as or more than a person's. Privacy is still the top concern for 51%.
- **Expectations are the highest too.** 79% say shipping updates are very important, 58% expect confirmation almost immediately, and 80% would engage with an interactive promotion.

APAC (Australia)

- **Spending is the most squeezed.** 45% plan to cut their BFCM spending and only 22% plan to spend more.
- **SMS leads for order updates.** 53% want order updates by SMS, the highest of any region.
- **AI confidence is growing fastest.** 40% think AI will make shopping easier, up 11 points from 2025 — the largest regional gain in the survey.

Source: BFCM 2026 Consumer Survey, 2,501 respondents. Europe = UK, France, Germany, Spain | North America = US | LATAM = Brazil, Mexico | APAC = Australia

Thank you!

If you have any questions, reach out to Sinch press desk

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