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2026 U.K. Holiday Forecast

Adobe Digital Insights | September 2026



Methodology

Adobe Digital Insights produces the only industry report that measures direct consumer transactions online. Daily transaction data is aggregated and **anonymised** across categories, payment methods, marketing channels, device types and more to provide a pulse on the digital economy. The sample includes:

100M+

Product SKUs

100B+

Annual Website Visits

18

Online Retail Categories

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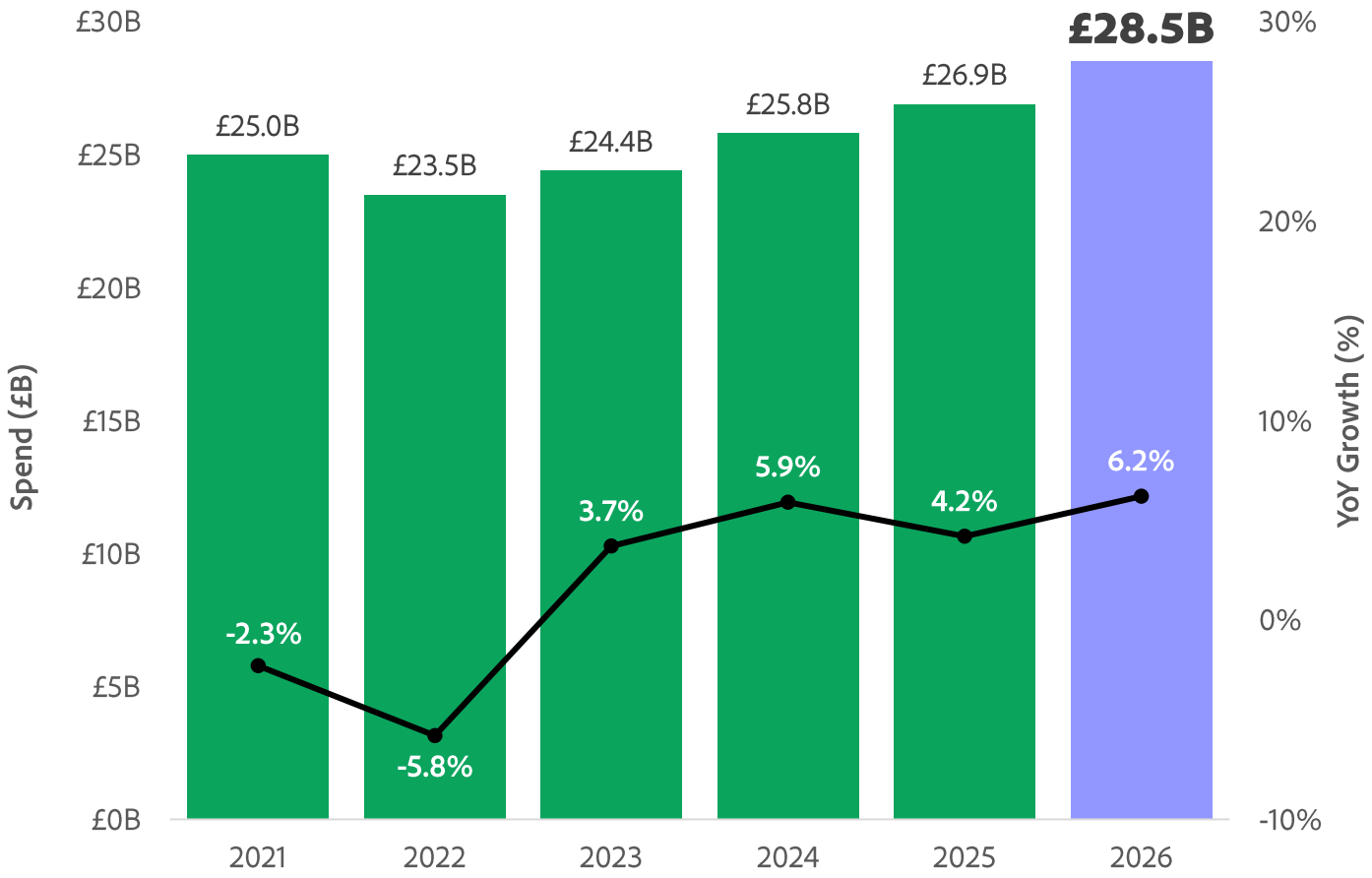
Key Findings for Holiday 2026

Record £28.52 billion season, with November the first £15 billion month	Online spend Nov.–Dec. is forecast at £28.52 billion (+6.2% YoY). November reaches £15.0 billion (+10.7%) as Cyber Monday moves to 30 Nov. and Q4 tops £40 billion (+6.4%).
October kicks off early momentum	October is forecast at £11.5 billion (+6.9% YoY), growing faster than the season. Prime Big Deal Days passes £1 billion for the first time (£1.01 billion, +5.1%).
Value-first shopping powers the season	Online prices are down 2.5% YoY against +3.1% CPIH. Discounts peak at 25%, and Black Friday is the biggest day (£1.24 billion) of a £4.05 billion Cyber Weekend (+6.6%).
Online price advantage drives shoppers to trade up on gifts and stock up on essentials	The share of the most expensive goods sold rises 13%+ vs. 2026 averages. Cyber Week lifts clothing basics +215% and personal hygiene +148%.
AI is emerging as a new front door for online retail	AI-driven retail traffic is forecast at +214% YoY Nov.–Dec., up from +111% in September, peaking at +268% on Boxing Day.
Social and affiliate channels are reshaping traffic acquisition	Social Networks (+24%) and Affiliates/Partners (+7%) lead revenue share growth; Paid Search +4%, Natural Search +1%.

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Online shoppers expected to spend a record £28.52 billion

- From November-December 2026, online holiday spending is expected to reach **£28.52 billion** and grow **6.2% YoY**.
- As holiday spending pushes earlier into the year, the broader Fourth Quarter (October–December) is projected to see **£40 billion** spent online, up **6.4% YoY**.



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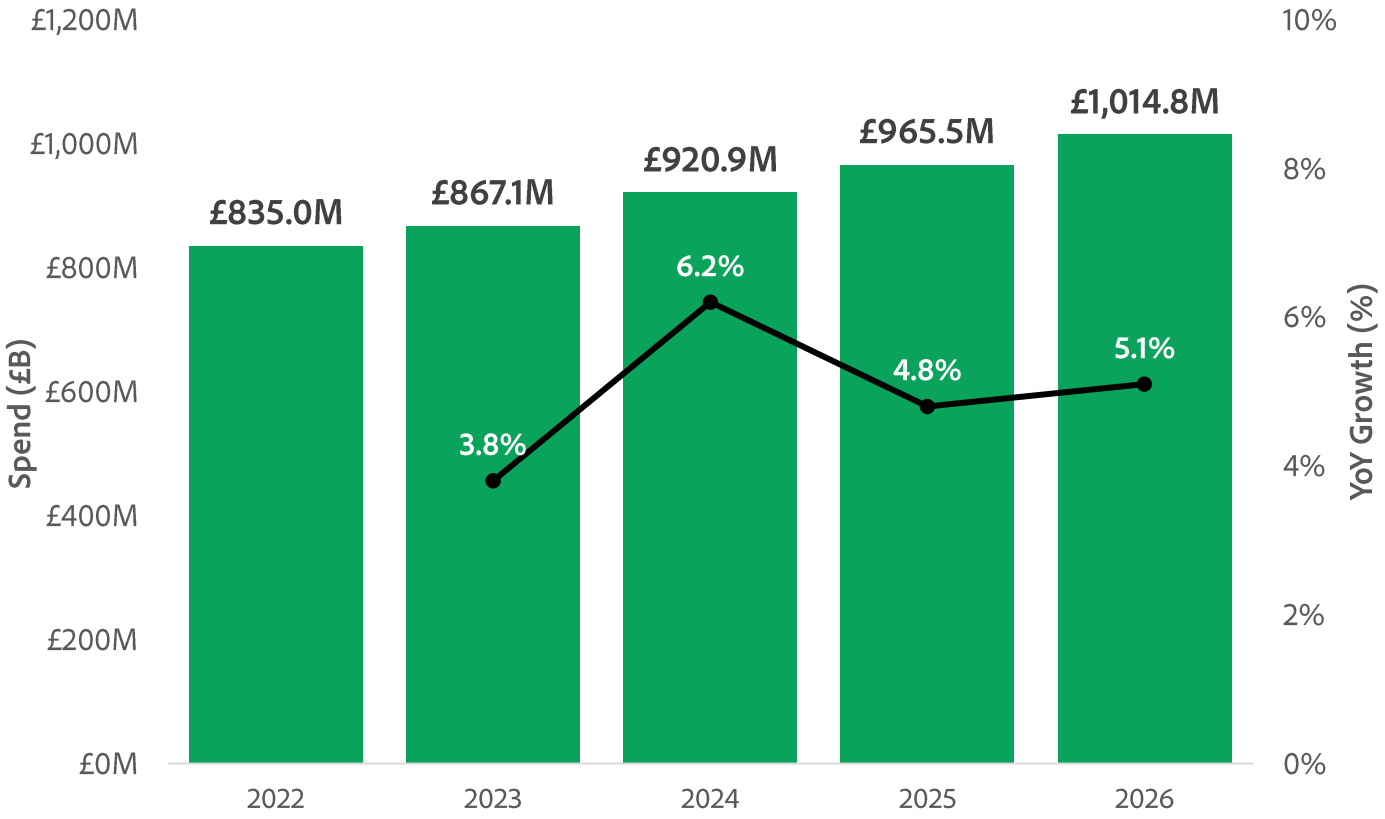
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Early Holiday Shopping Kicks Off in October

- October's online spending in 2026 is projected to be **22.6%** higher than the average monthly spending from January to July.
- Prime Big Deal Days is a key driver of that shift, recording more than **£1 billion** in online spending this year for the first time, up **5.1% YoY**.
- Online shoppers are already shifting to holiday preparations with online sales of Christmas trees and ornaments up **155%** in the first three weeks of October, compared to average levels in September.

Prime Big Deal Days – October

Adobe Digital Insights, 2026



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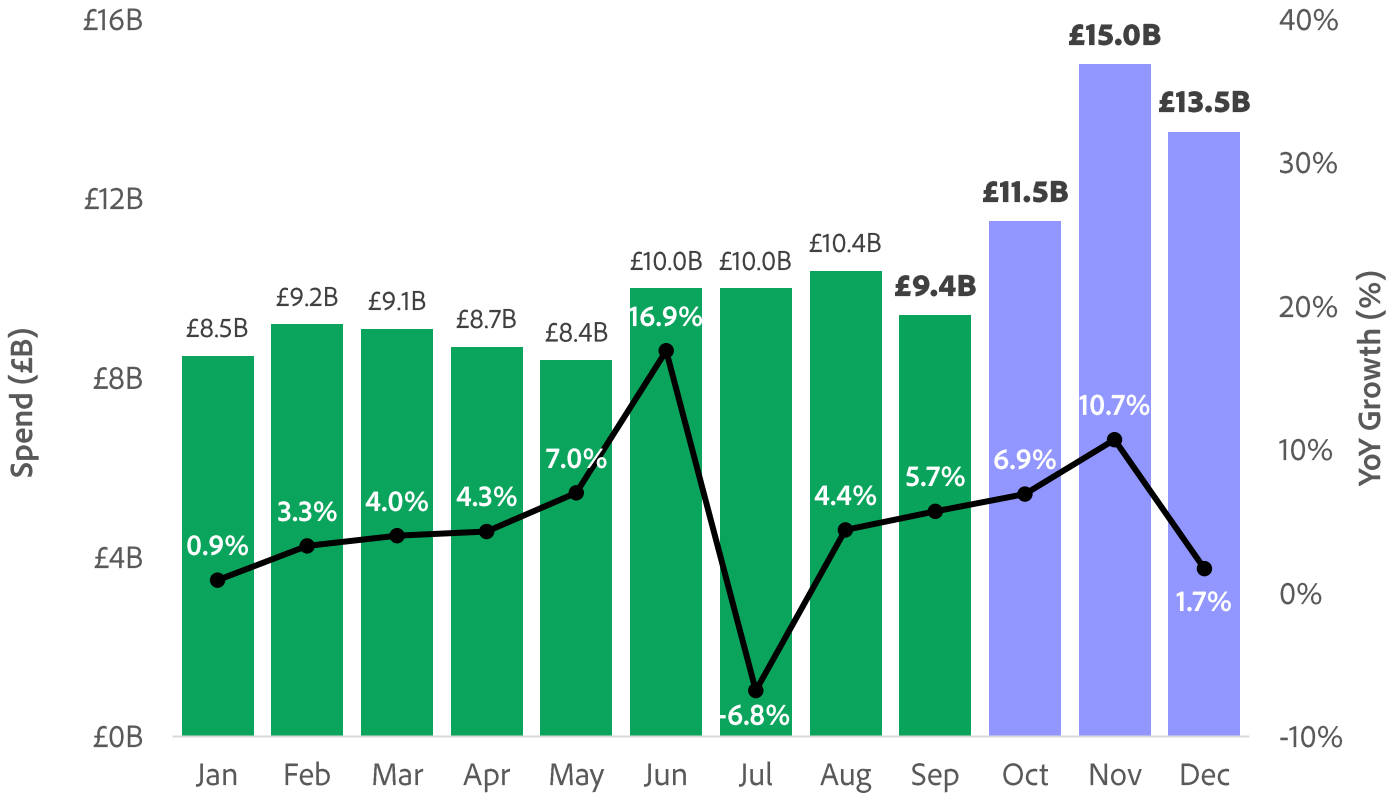
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November to Be the First £15 Billion Month for U.K. Online Retail

- Online spending in October is projected to reach **£11.5 billion**, up **6.9% YoY** outpacing full season's 6.2% growth.
- November is forecast to record the highest growth of the season at **10.7% YoY**, drawing in **£15.0 billion**. This elevated growth is largely due to calendar shifts as Cyber Monday, the largest shopping day of the year, moves from Dec. 1, 2025, to Nov. 30, 2026.
- December is similarly subject to calendar effects reflected in the projected **1.7% YoY** growth, but total online spending between November and December is forecast to total **£28.52 billion**, up **6.2% YoY**.
- Similarly, Prime Day's shift from July to June this year was reflected in significant YoY growth in June (+16.9%) and decline in July (-6.8%).

U.K. Monthly Spend Forecast 2026

Adobe Digital Insights, 2026



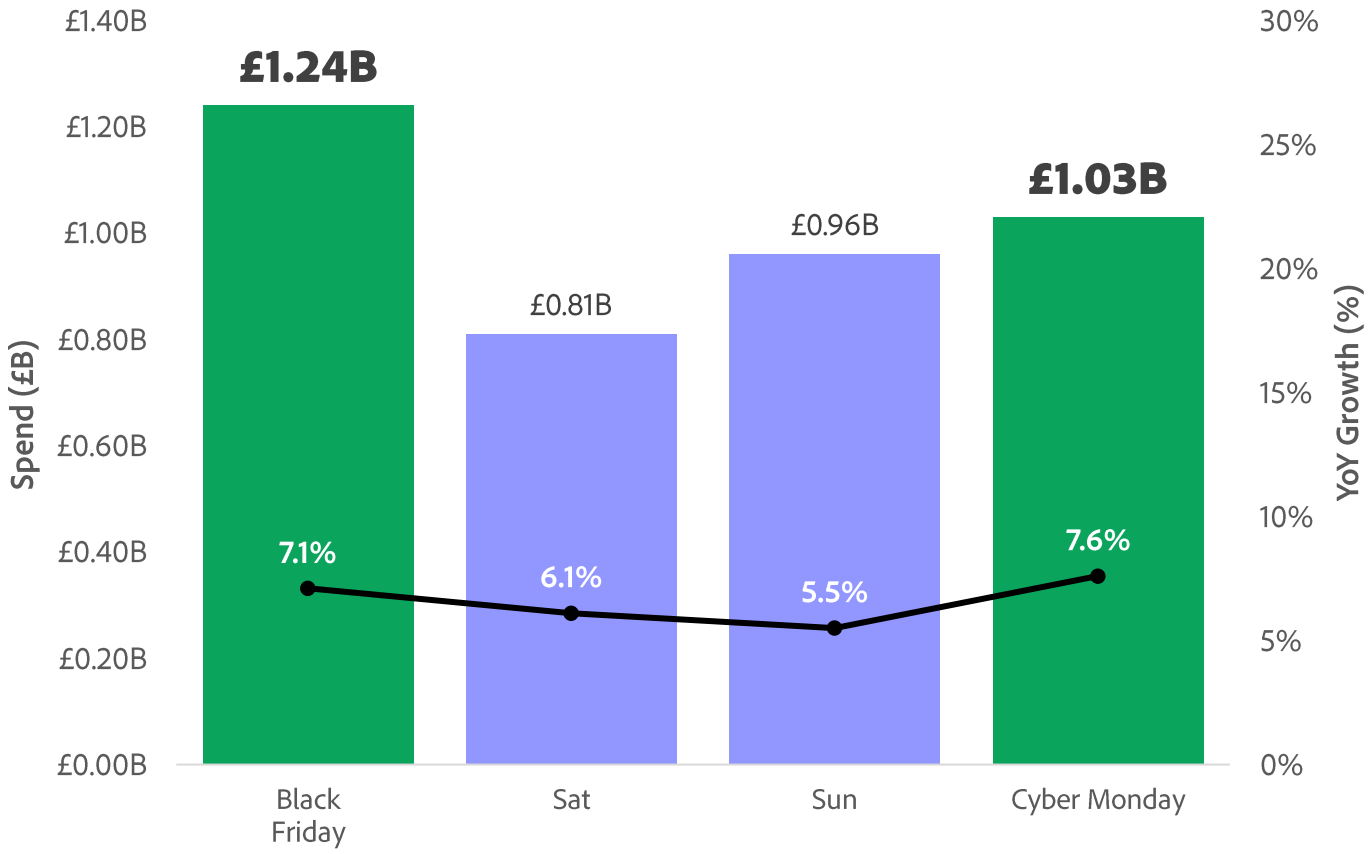
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Four-Day Cyber Weekend to Draw More than £4 Billion

- Black Friday is forecast to see the highest online spend over Cyber Weekend at **£1.24 billion**, growing **7.1% YoY**.
- Cyber Monday is expected to see the fastest growth of Cyber Weekend at **7.6% YoY**, driving the day's spending over **£1 billion** for the first time.
- Overall Cyber Weekend growth (Black Friday to Cyber Monday) is forecast to draw in **£4.05 billion,** up **6.6% YoY**.

UK Cyber Weekend Forecast 2026

Adobe Digital Insights, 2026



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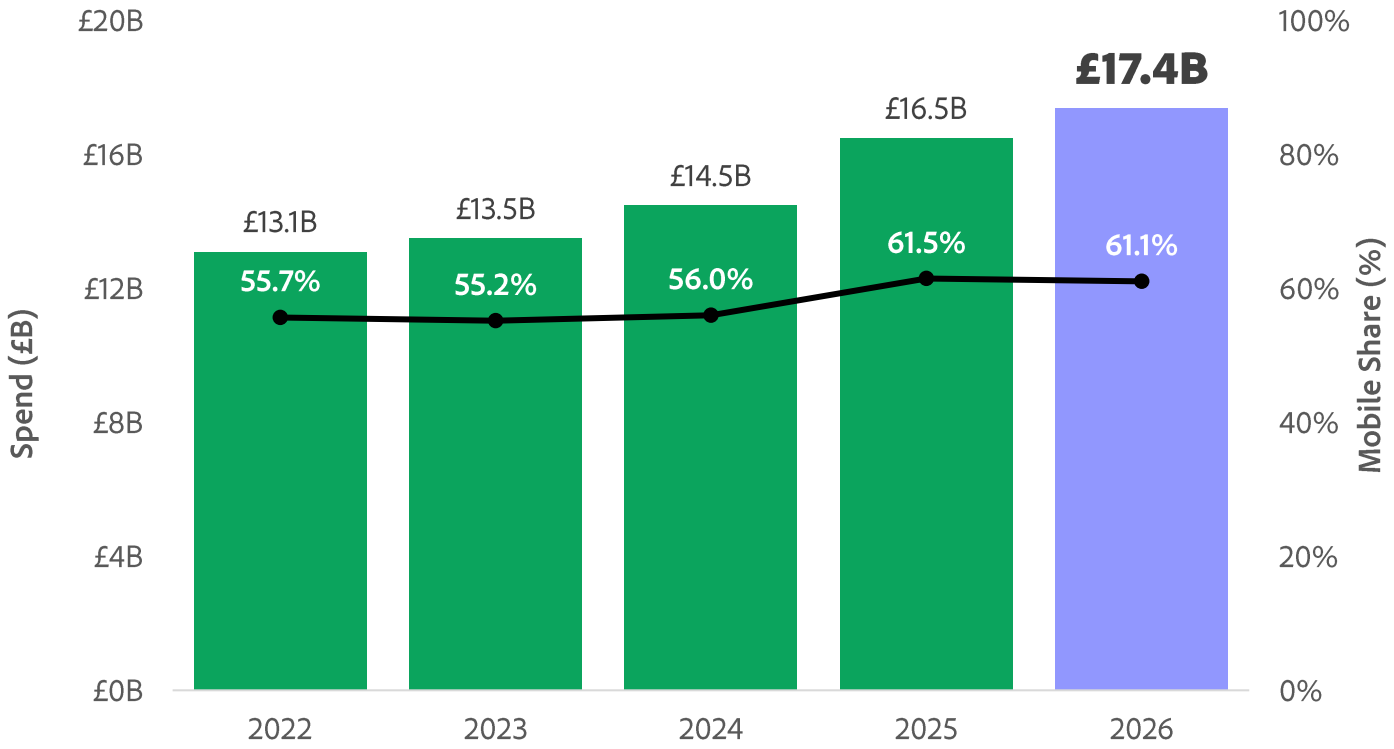
Mobile Shopping

Mobile share continues to scale

- Mobile shopping is forecast to again hit a new milestone with most online transactions **(61.1%)** taking place on a mobile device this season (November–December).
- This marks the second holiday season where mobile share of revenue is forecast above 60% for the season.

Mobile Share Over Time

Adobe Digital Insights, January 2019 – December 2026 (Forecast)



Key insight: Mobile spend is forecast to hit **£17.4 billion** this holiday season, up **5.8% YoY** from last year's £16.5 billion.

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Christmas Day Forecast as the Strongest for Mobile Shopping

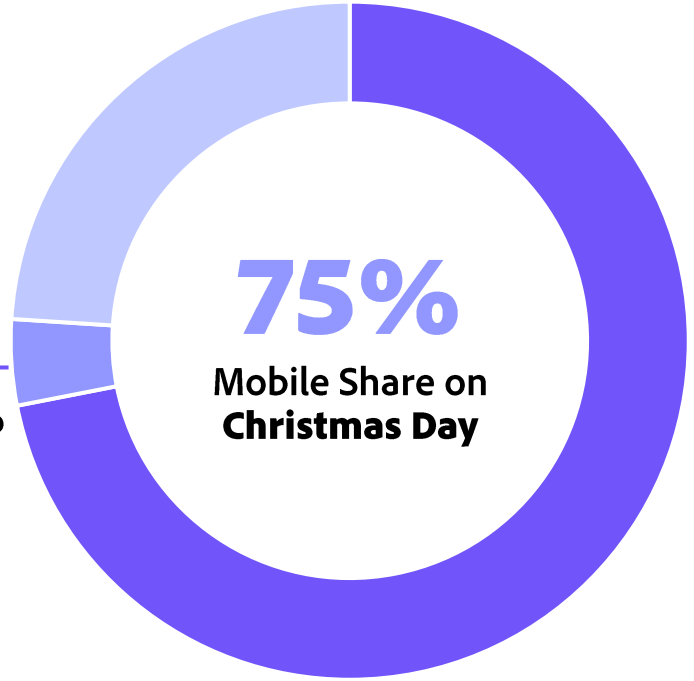
- Mobile shopping tends to peak on holidays when people are at home with family and less likely to be using a computer.
- Mobile shopping is forecast to peak on Christmas Day when it hits **75%** of online sales, on par with 2025 levels.
- This is projected to translate to **£225.6 million** spent through a mobile device on Christmas Day, up **4.1% YoY** from 2025.



£225.6M

Mobile Spend on **Christmas Day**

Up 4.1%
From 2025



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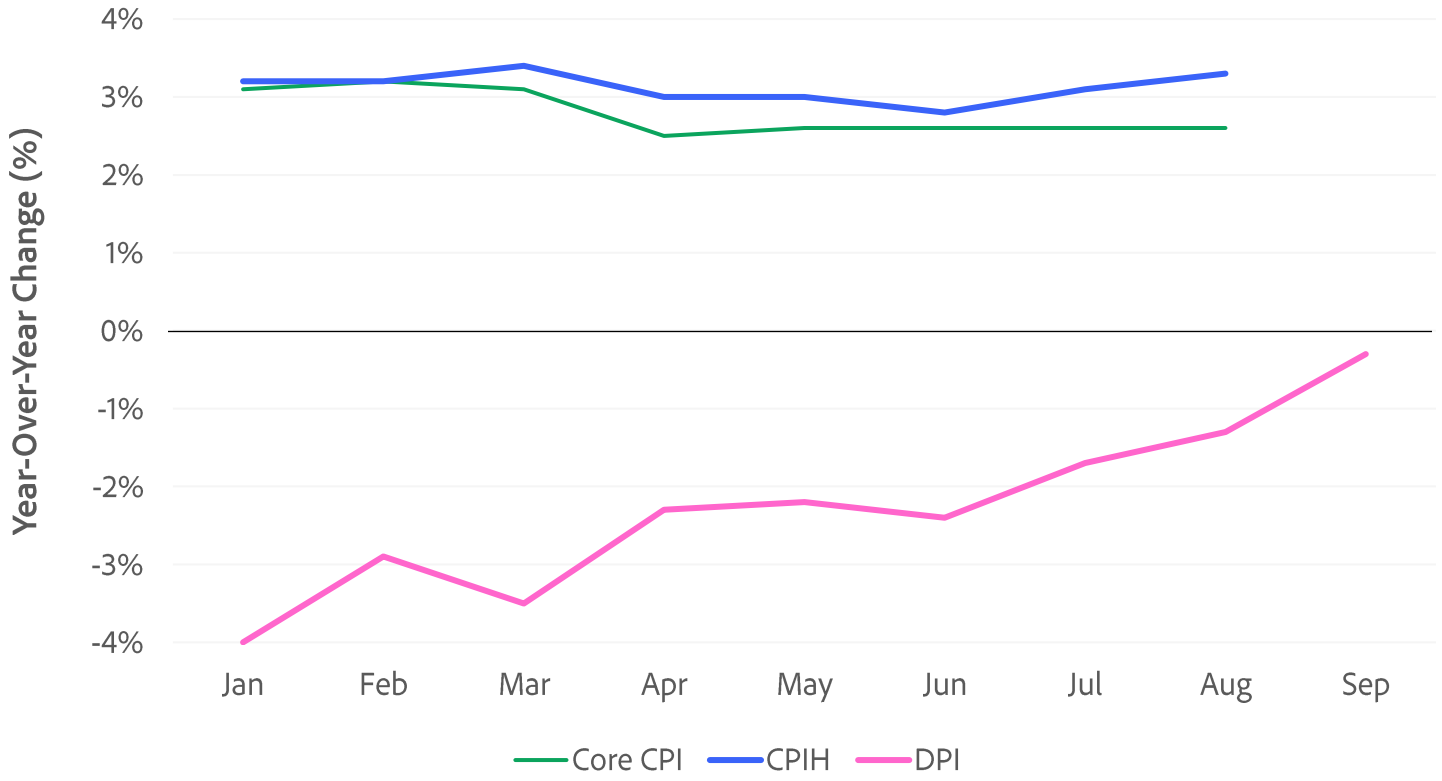
Pricing & Discounts

Shoppers Turn to Online Goods for Favourable Prices

- As of August 2026, online inflation has averaged **-2.5% YoY** in 2026, compared to **+3.1% YoY** for the U.K. Consumer Prices Index (CPIH).
- The gap can be partially explained by differing basket compositions, but even the more closely aligned Core CPI (excluding fuel, shelter, food, alcohol, and tobacco) has still averaged **+2.8% YoY**.
- While the gap has narrowed in recent months with the August DPI landing at **-1.3% YoY** and the CPIH at **+3.3% YoY**, online retail presents consumers with a significant price advantage over in-store shopping, expected to drive more than **1 in 3 pounds** to be spent online this holiday season.

Inflation: Online vs Topline

Adobe Analytics, January 2016 – August 2026



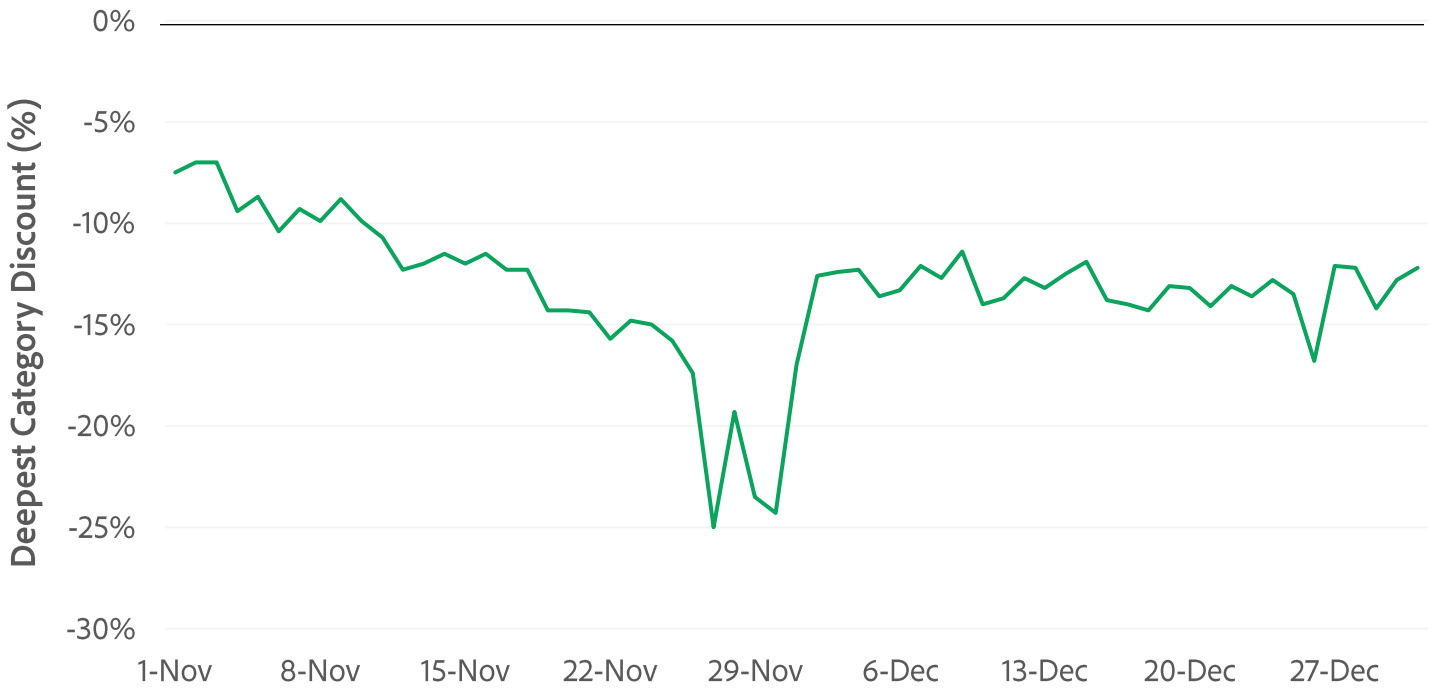
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Discounts Climb Steadily All the Way to Cyber Week

- Discounts keep building earlier each year: 12% off in early November, 18% off just before Black Friday, and 25% off—the season's deepest—once Cyber Week hits.
- That 25% peak holds through Cyber Week (Nov. 27 to Nov. 30), with Black Friday marking the single best day to shop.
- December discounts ease off slightly from November's high but still stay strong in the 10% to 17% range.

Deepest Discount Levels – Forecast

Adobe Digital Insights, 2026



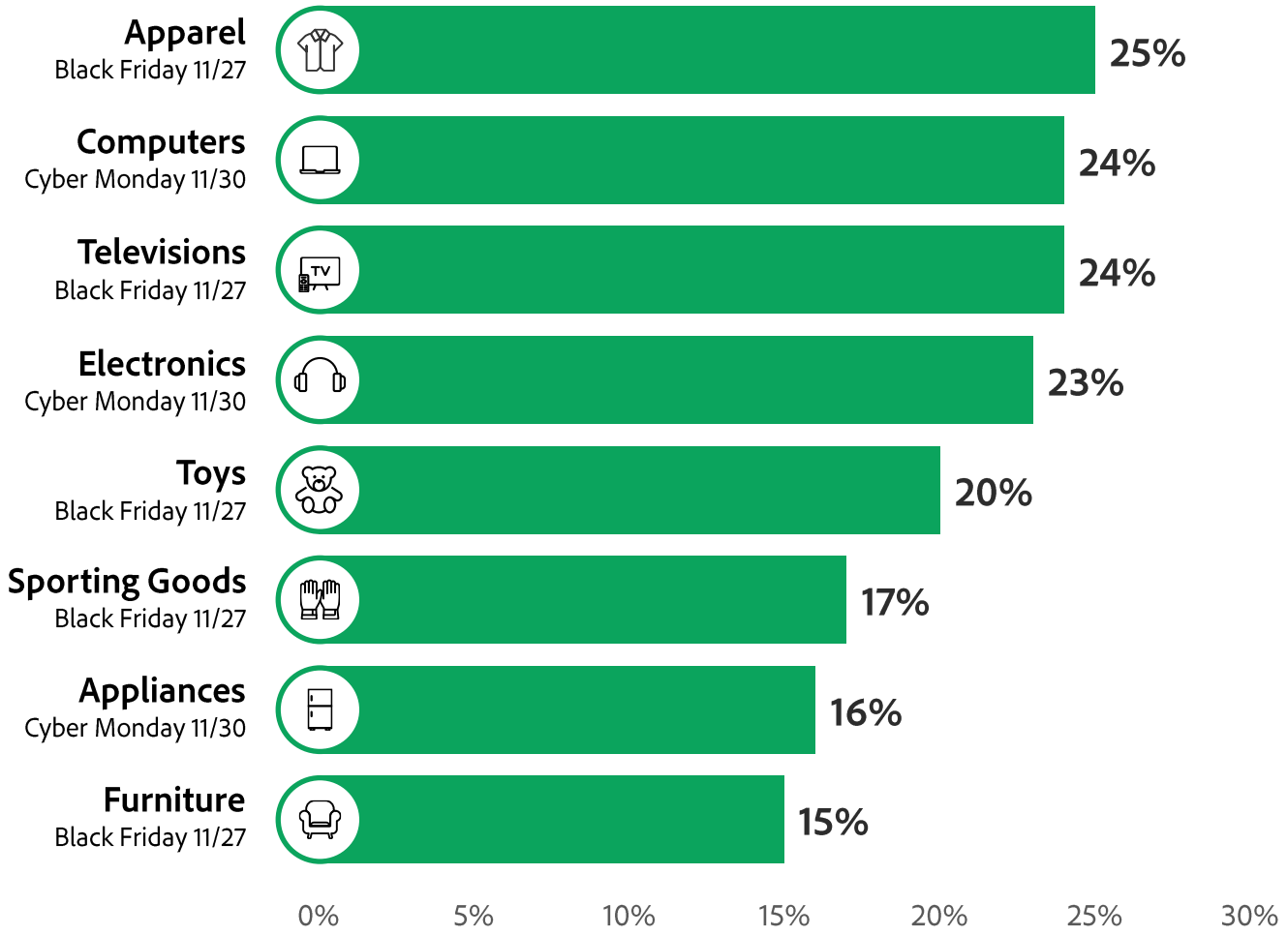
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Categories

Black Friday to Offer the Deepest Discounts of the Year

- To encourage higher spending from price-sensitive consumers, we expect retailers to provide significant seasonal discounts up to **25%.**
- Black Friday is expected to be the best overall day to shop, closely followed by Cyber Monday, offering the deepest discounts of the year across most online retail categories.

The 2026 holiday season's **deepest discounts** are expected to reach the following levels:



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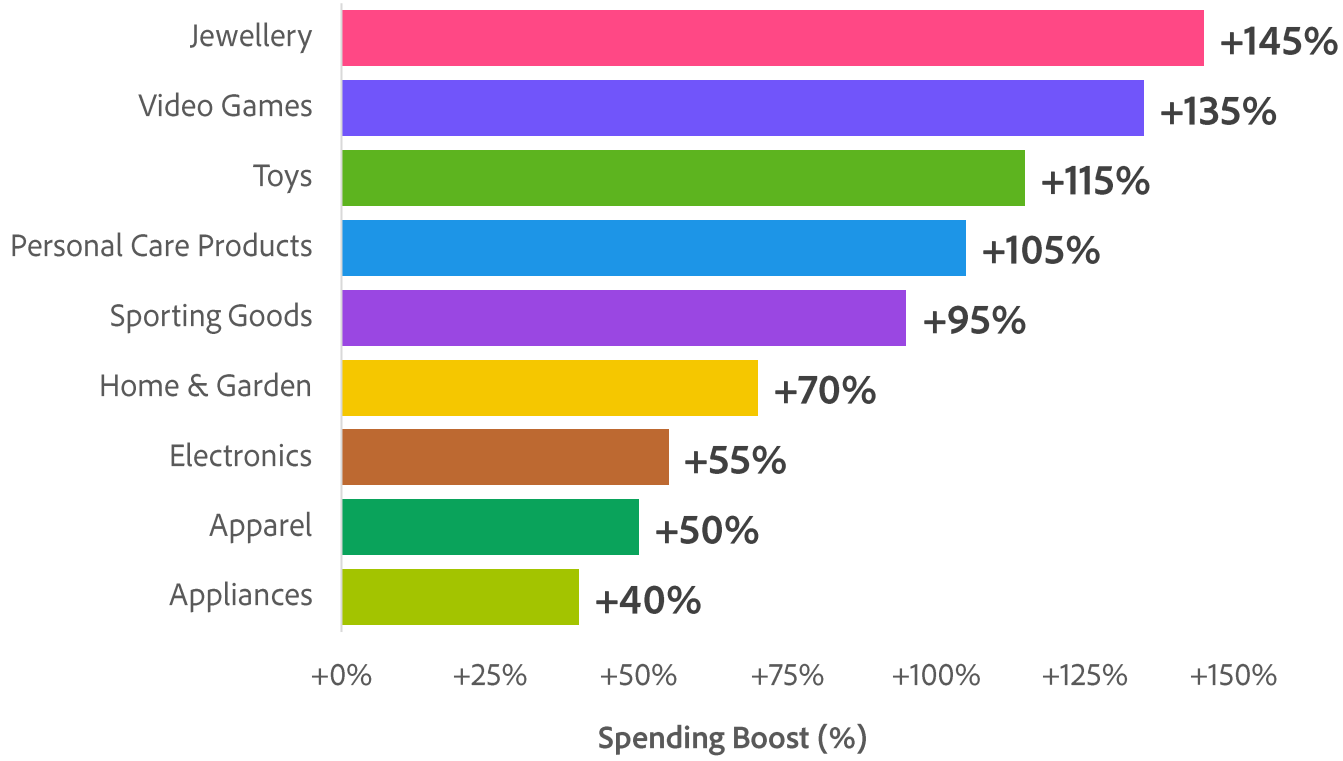
Categories

Top Categories Driving Holiday Spending Growth

- The 2026 holiday season is projected to bring a **51%** lift in online spending compared to average daily levels this year, led by categories

Holiday Season Category Boost

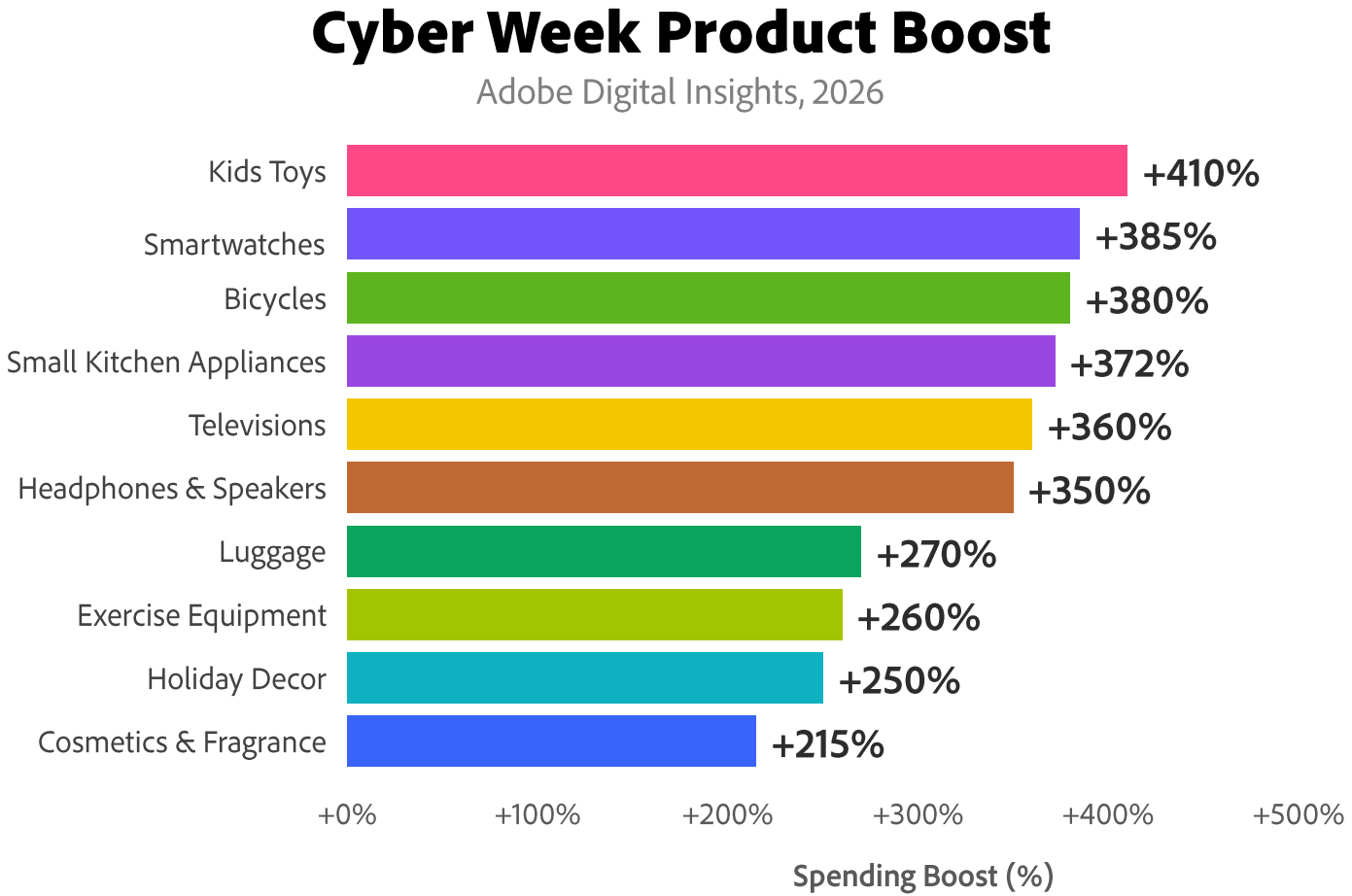
November-December Period, Adobe Digital Insights, 2026



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Top Subcategories Will Significantly Overperform During Cyber Week

- While broad upticks across ecommerce products are expected during Cyber Week, top products across electronics, home goods, sporting goods, and toys are expected to significantly overperform.
- Top product subcategories during the Cyber 5 period are expected to see more than a **200%** uptick in sales compared to the daily average from January-August



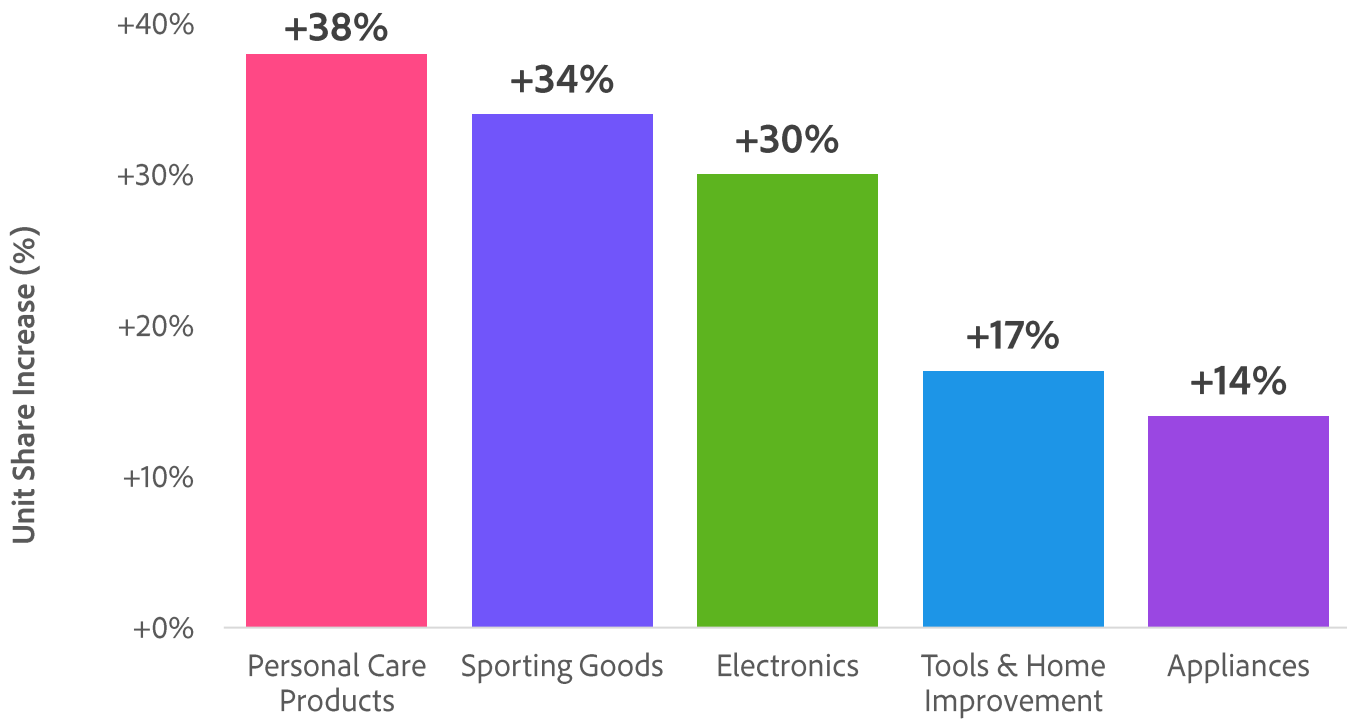
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Consumers Bring Trading-Up Momentum into the Holidays

- In 2026, consumers have started to reverse long-standing trends of trading down to cheaper goods across categories including electronics and appliances.
- During the 2026 holiday season, the share of goods sold from the most expensive goods is expected to rise by more than **13%** across retail categories compared to average levels this year.

Holiday Season Trading-Up Forecast

Adobe Digital Insights, 2026



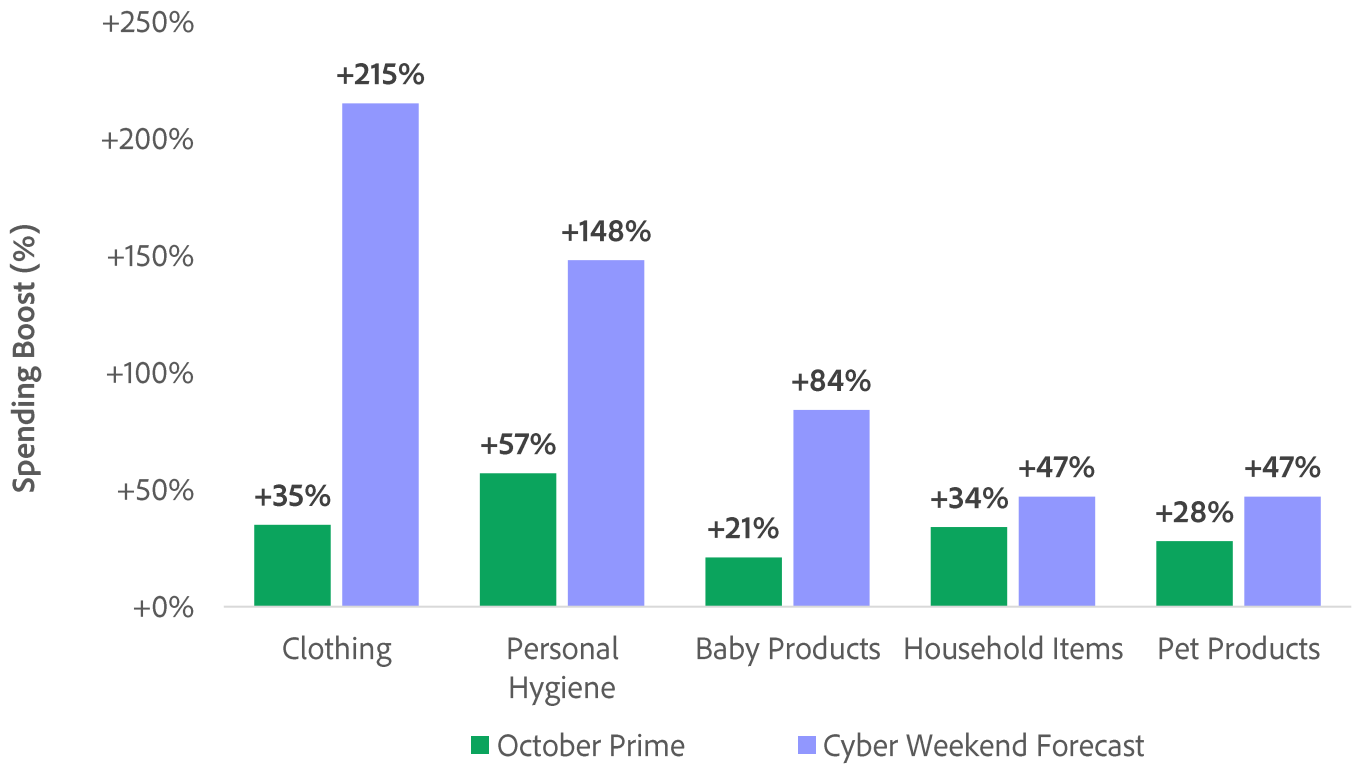
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Consumers Capitalise on Holiday Sales to Stock Up on Essentials

- In addition to seeking out deals on gifts and high-ticket items, consumers are increasingly turning to holiday sales to save and stock up on essentials like clothing basics, personal hygiene products, and household cleaning supplies.

Holiday Essentials Boost

Adobe Digital Insights, 2026



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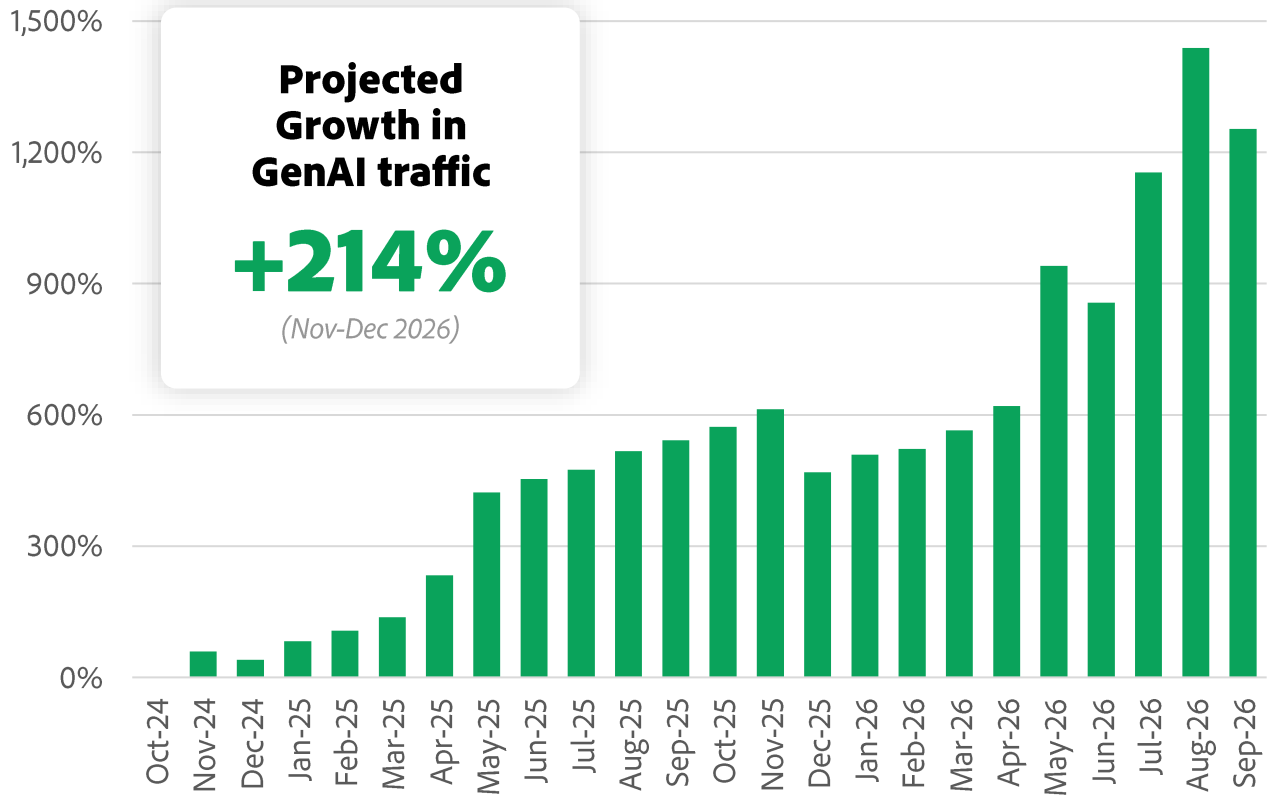
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AI Shopping Momentum Accelerates into the 2026 Holidays

- AI-driven retail traffic grew **111% YoY in September 2026** and is projected to accelerate through the holidays, with November-December traffic forecast to grow **214% YoY.**
- Holiday traffic is projected to grow **158%** on **Black Friday, 226%** on **Cyber Monday**, and **268%** on **Boxing Day**, reinforcing AI's expanding role in holiday shopping journeys.

Indexed Growth in AI Driven Visit Share

Adobe Digital Insights, October 2024 – September 2026



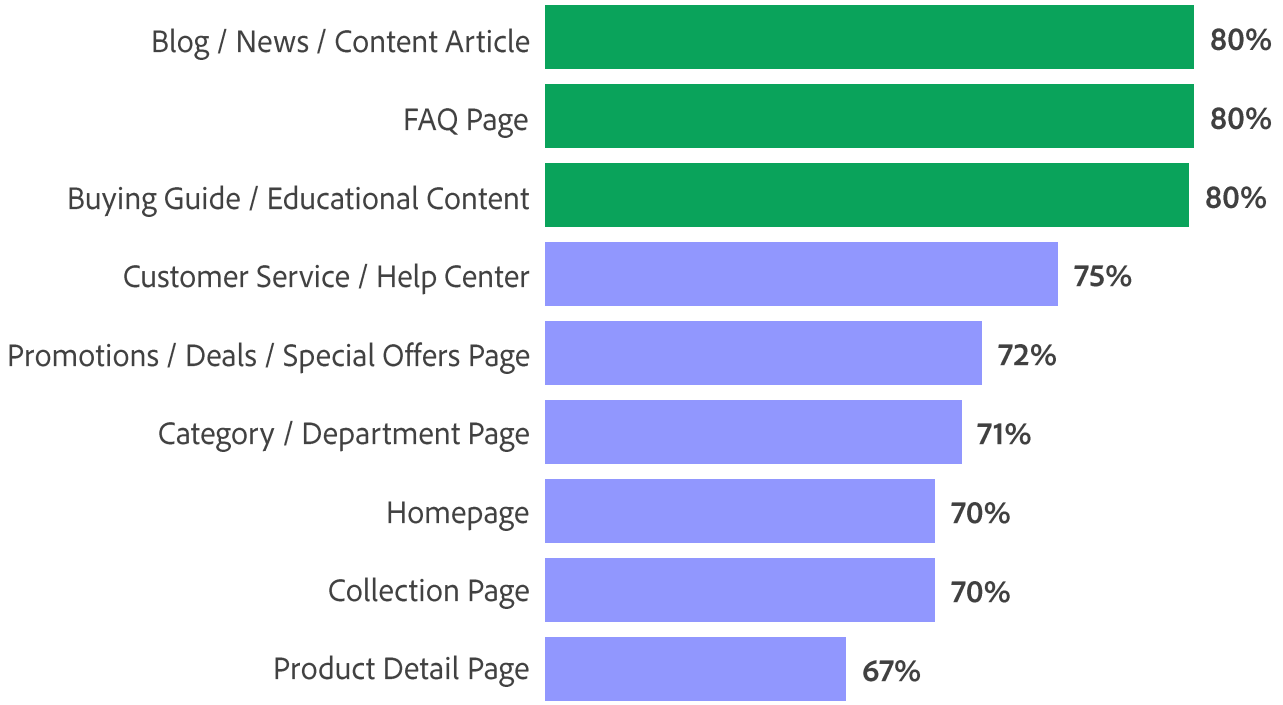
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Buying Guides, FAQs, and News Content Lead AI Citation Performance

- **Blog/news content, FAQ pages, and buying guides lead AI citation readability at 80%,** suggesting AI platforms favor informational, educational, and question-driven content when selecting sources.
- Customer service pages (75%) and promotions pages (72%) also perform well, indicating that practical support content and deal-focused pages are readily understood and cited by AI tools.
- **Product detail pages (67%) rank lowest** among page types, trailing the top-performing categories by 13 percentage points and representing the largest opportunity to improve AI readability and citation potential.

AI Citation Readability by Page Category

Adobe Digital Insights, September 2026



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AI-Boosted Product Categories This Holiday Season

STRONG BOOST	MODERATE BOOST	WEAKER BOOST
• Video Games	• Jewellery	• Home & Garden
• Toys	• Personal Care Products	• Home Improvement
• Electronics	• Sporting Goods	• Baby & Toddler
• Appliances	• Apparel	
	• Pet Products	

Products expected to see strong AI-driven referral growth this season include :

- Outerwear
- Adidas Sneakers
- Hair Care
- Cosmetics
- Smartwatches
- Nintendo Switch
- Lego
- Blenders
- Air Fryers

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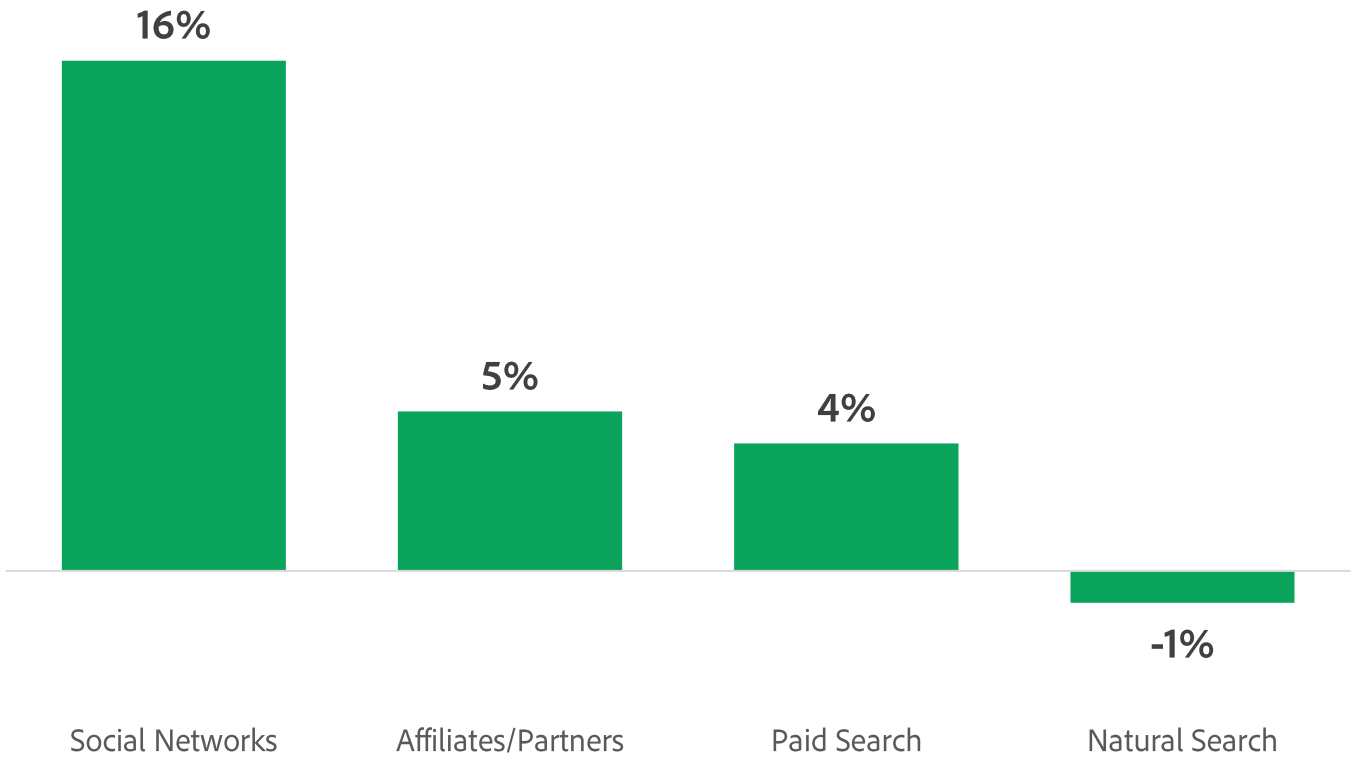
Affiliate & Social Impact

Social Networks Lead Revenue Share Growth

- In the pre-holiday period (Jan.-Sept.), **Social Networks** led revenue share growth at **+16% YoY**, significantly outpacing other marketing channels.
- **Affiliates/Partners** (+5%) and **Paid Search** (+4%) posted modest gains, while **Natural Search** declined 1%, signaling a shift toward social- and partner-driven channels.

Growth in Revenue Share by Marketing Channels

Adobe Digital Insights, Jan-Sep 2025 vs Jan-Sep 2026



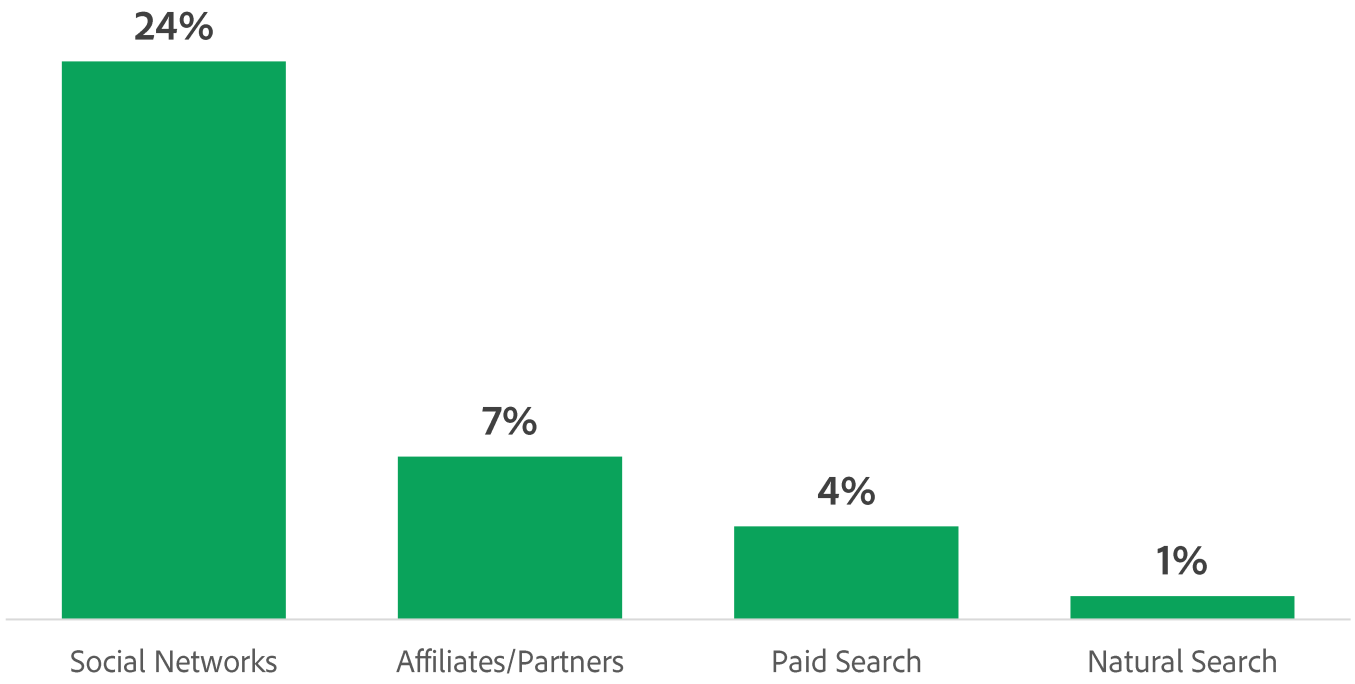
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Social & Affiliates to Extend Lead in Revenue Share Growth Through Holidays

- **Social Networks** (+24%) and **Affiliates/Partners** (+7%) are forecast to extend their lead in revenue share growth into the holidays, reinforcing the growing importance of social- and partner-driven acquisition.
- **Paid Search** (+4%) and **Natural Search** (+1%) are projected to see modest gains.

Forecast: Growth in Revenue Share by Marketing Channel

Adobe Digital Insights, Holiday Season 2025 vs Holiday Season 2026



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Hot Products for the 2026 Holiday



- Jellycat Plush
- KPop Demon Hunters Toys
- LEGO Pokémon & Smart Play
- Mini Brands Really Works Vinyl Playset
- Pokémon Pikachu Puppetronic
- Tickle Me Elmo Giggle Max
- Toniebox Lite
- Toy Story 5 Toys



- Call of Duty: Modern Warfare 4
- EA Sports FC 27
- Grand Theft Auto VI
- Marvel's Wolverine
- Minecraft Dungeons II
- Nintendo Switch 2
- Pokémon Pokopia
- PS5 / PS5 Pro
- Xbox Series X



- AirPods Pro 3
- Dyson Airwrap
- Google Pixel 11
- iPhone 18 Pro
- iPhone Duo
- Kodak Charmera
- Meta AI Glasses
- Oura Ring 5
- Samsung Galaxy S26 / Z Fold8
- WHOOP

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