HOW TO WIN CYBER WEEK 2026

H1 INSIGHTS TO MAXIMIZE YOUR BRAND'S IMPACT

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THE HOLIDAY SHOPPING OUTLOOK

The good news: consumers aren't pulling back from spending this holiday season. The challenging news: they're increasingly cautious.

According to the Basis 2026 Holiday Shopping and Advertising Trends report, most consumers (56 percent) plan to spend the same amount, with nearly 30 percent saying they'll spend even more. Those metrics match the steady growth that eMarketer predicts in its Holiday Shopping 2026 report. The company's research forecasts that retail sales for November and December 2026 will rise by 4.1 percent (an improvement on last year's holiday growth rate), marking the second consecutive year in which holiday season growth trails the full-year average.

Economic pressure is pushing consumers toward more deliberate decisions. Basis found that a total of 26 percent plan to seek out more deals this year. eMarketer has even more detail: strained consumers will hold out for the deepest discounts, driving the Cyber Five period to reclaim its place at the center of the holiday shopping calendar and surpass $50 billion in ecommerce for the first time. Black Friday will lead growth among the five days at 7.7 percent, while Cyber Monday will hold on to its title of the biggest online shopping day of the year.

That deal-seeking is playing out against a shifting, AI-driven discovery landscape that's changing how consumers shop this holiday season. How consumers find, research and check out products is collapsing into a single shopping moment that no longer starts at a search bar.

THE HOLIDAY SEASON IS WON MONTHS BEFORE CHECKOUT

2026

We're seeing signals that the promotional calendar is shifting, meaning that brands must focus on holiday shopping months before checkout. Two of the most significant markers: Amazon moved Prime Day from July to June 23-26, 2026, the earliest summer slot in years, and Walmart stacked its own event directly onto that window rather than ceding it. This move pulled summer sales into Q2, creating a wider gap before autumn and winter promotions.

Shrinking budgets and continued economic uncertainty are making consumers more strategic with their holiday spend. Fewer are reacting in the moment, and more are researching longer, purchasing earlier, hunting harder for deals, and showing less brand loyalty. According to Basis's 2026 Winter Holiday Shopping Trends report, 57 percent of consumers will hunt for deals more actively, 33 percent have set a stricter budget, and 25 percent plan to spread spending over time.

Shoppers now start earlier, compare across more channels, and lean on search, social, and AI long before a brand enters the picture. They'll also look to stretch their budgets by holding out for the best deals, relying on credit, and turning to buy now, pay later financing. Even so, Cyber Five's appeal holds for consumers who have been conditioned to wait for the deepest discounts during this period.

Because of the earlier start to the holiday shopping season, shoppers will take more time to make decisions. That means brands need presence across the whole journey, well beyond the moment of intent. By working with diverse partners across the customer journey, brands can have visibility at all touchpoints.

REAL-WORLD INSIGHTS FROM AP CLIENTS

Our performance analysis for the first half of 2026 shows a portfolio converting more efficiently on far less traffic. Acceleration Partners clients saw clicks fall 23.6% year over year, yet conversion rate rose 38.2%, driving a 5.5% increase in actions. Revenue grew just 1.3% as average order value declined 4%, meaning the additional conversions were largely offset by lower spend per transaction. The data points to consumers being more selective about when and where they click but converting at a much higher rate once they do. That's consistent with forecasted trends toward more deliberate, comparison-driven shopping instead of broad browsing.

H1 GLOBAL CLIENT PERFORMANCE

	Revenue Y/Y	Clicks Y/Y	Actions Y/Y	CR Y/Y	AOV Y/Y
January	-5.7%	-30.3%	-24.2%	4.8%	10.6%
February	12.6%	-30.3%	14.2%	70.5%	-12.2%
March	8.3%	-29.1%	22.1%	81.4%	-18.9%
April	-3.0%	-25.9%	18.9%	60.4%	-19.9%
May	-18.4%	-14.2%	-17.5%	-8.3%	-0.0%
June	17.6%	-9.8%	26.3%	42.2%	-12.2%
Total	**1.3%**	**-23.6%**	**5.5%**	**38.2%**	**-4.0%**

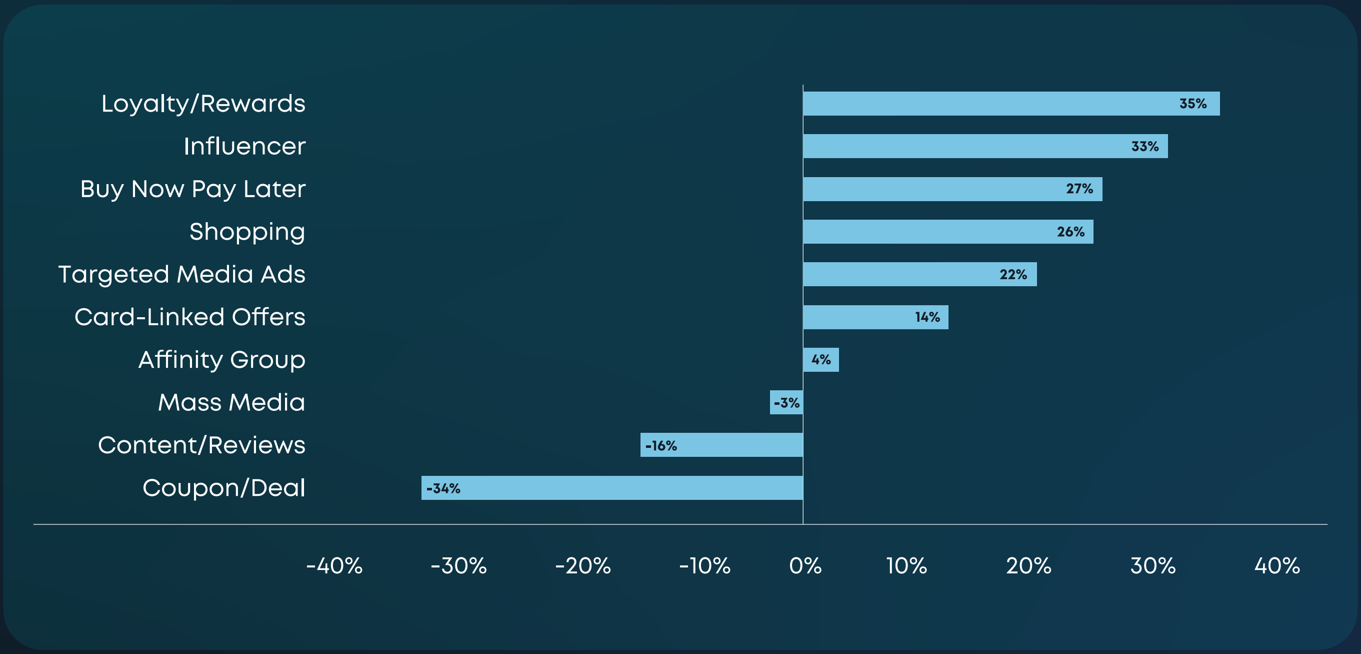
FOUR SHIFTS DEFINING THE 2026 HOLIDAY SHOPPING SEASON

1 THE WINNING PARTNERS ARE SHIFTING.

Discount partners still play a role, especially in today's price-sensitive environment, but brands are increasingly investing in next-gen partners such as card-linked offer (CLO) platforms, creators and buy now, pay later (BNPL) providers. Consumer research shows shoppers discover and research products across a diverse set of channels rather than one dominant path, and nearly 23% research a product five or more times before buying, another reason that brands should invest in diverse partnerships to reach shoppers throughout their purchasing journey.

Across AP's global client portfolio, the data shows where growth is concentrating: Loyalty, BNPL, content, affinity, influencer, commerce solution, and CLO combined grew 30% year over year and now make up 69% of total revenue, up from 66%.

Y/Y REVENUE GROWTH BY PUBLISHER VERTICAL



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LOYALTY

Loyalty websites continue to lead all publisher verticals, driving the highest share of revenue growth year over year. Their performance highlights how effectively loyalty partners reach value-conscious consumers who are actively seeking added benefits with their purchases, such as cash back, points, or other rewards. AP clients leveraging loyalty sites have seen a modest uptick in both revenue and conversions.

INFLUENCER

Creator marketing has become a powerful tool for brands looking to build authentic connections with consumers. For Acceleration Partners clients, influencer revenue rose 33% year-over-year while commissions paid fell 12%, evidence that creator partnerships are converting efficiently and not just building awareness. By collaborating with trusted voices in niche communities, brands can boost awareness, drive measurable results and foster long-term loyalty across the holiday season.

BUY NOW PAY LATER

Consumers are increasingly using alternative payment methods for larger purchases. Retailers are integrating BNPL options into their strategies to meet consumer demand for flexible financing. Affordability remains a critical concern for households, making BNPL a vital feature this holiday season.

COUPON/DEAL

Data from H1 2026 shows this partner vertical is declining, a signal that programs leaning heavily on coupon partners are increasingly tied to a shrinking share of a much wider discovery landscape. Coupon still converts, but it now represents a smaller portion of the overall mix heading into the year's biggest promotional window. The opportunity for brands is to diversify promotional budget across the growing partner categories, which reach that same deal-seeking shopper through additional channels.

CONTENT/REVIEWS

This channel is the quiet warning sign. Revenue is down 16%, active revenue-driving content partners dropped about 11%, and the effective commission rate rose from 8.5% to 10.7%. Brands are paying more per dollar for less content revenue, a trend tied directly to AI search compressing publisher traffic.

But the affiliate channel isn't just exposed to this shift, it can help brands navigate it. Many of the content and review partners losing traffic are the same publishers AI engines cite most often, so investing in those relationships now can protect visibility as search behavior evolves.

2 SHRINKING VOLUME DOESN'T MEAN SHRINKING VALUE.

More and more often, consumers are turning to AI-generated summaries and chat interfaces instead of traditional search. That move shrinks addressable audiences on the open web and reduces click-through rates. Many affiliate partners are also seeing drops in organic traffic because of AI search summaries that don't drive clicks, which impacts their ability to monetize and stay invested in brands. AI adoption in shopping is concentrated in the comparison stage, around 62% of usage, versus 23% at checkout, changing the function that traditional comparison and review content used to serve.

INSIGHTS FROM THE AP GLOBAL PORTFOLIO

Content/reviews and mass media both shrank in H1 2026, with active partners decreasing in both categories.

What's driving the reduction, though, matters more than the headline number. Think of it this way: fewer clicks are arriving. The ones that do convert better. This isn't a vertical quietly disappearing. It's top-of-funnel browsing traffic thinning out while the traffic that remains carries higher intent. These partners aren't failing to deliver. What they deliver is changing, less volume, but more qualified traffic.

CONTENT/REVIEWS

-33%
Clicks

-16%
Revenue

+24%
Revenue per Click

MASS MEDIA

-9%
Clicks

-3%
Revenue

+8%
Revenue per Click

3 YOUR AFFILIATE PROGRAM IS ALREADY SHAPING AI ANSWERS.

AI interfaces, including ChatGPT, Perplexity and Google AI Overviews, are now answering purchase decisions directly. What feeds those answers: review sites, comparison articles, and best-of guides that affiliate programs have been working with for years.

MOST OF THOSE PROGRAMS ARE ALREADY INFLUENCING AI ANSWERS

- More than 95% of citations in AI-generated answers come from third-party content.
- Between 20 and 40% of those citations come from affiliate-style publisher content.
- For one sports brand we measured, 16 of the top 25 AI-cited publishers in its category were already active in its affiliate program.

Where a brand has strong publisher relationships, those publishers are already influencing AI recommendations. Where the relationships are thin, the gap is visible in the citation data.

Instead of thinking of AI as a new channel to manage, consider it a system to understand, influence, and shape incentives around. For AP clients, our teams map what's happening in brand citation data, identify which publisher relationships are driving AI visibility, and tell clients what to do with that information. We treat it as part of the same growth engine rather than a separate workstream. The brands that will be best positioned as AI-mediated discovery matures are those building publisher relationships and citation authority now, not those waiting for perfect measurement before they start.

OUR STRATEGY IN ACTION

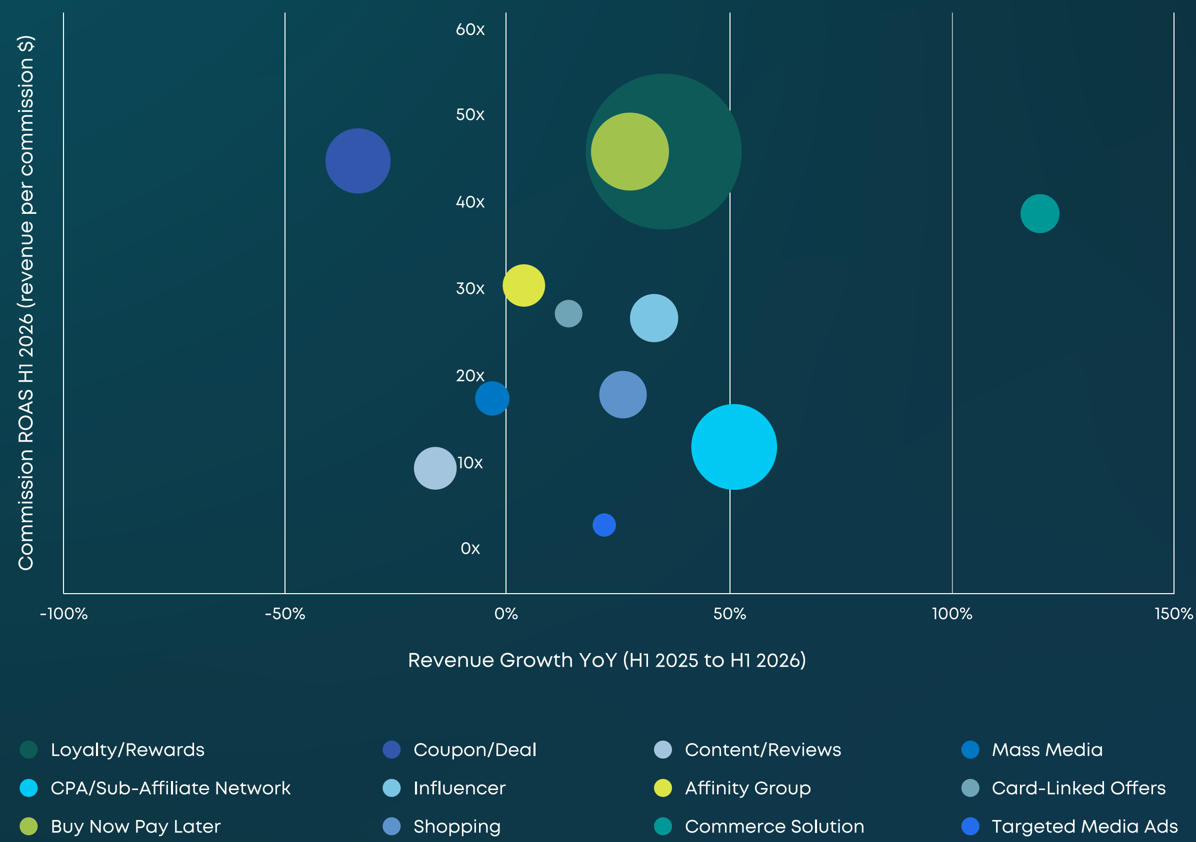
An Acceleration Partners financial services client recently recognized the growing effects of AI and the importance of incorporating it into content planning for an upcoming critical market season. Working with the agency's partnership marketing experts, the brand made a deliberate, bold move on generative engine optimization (GEO), partnering with CNET Group.

The results were substantial and a clear example of how a category leader can align earned authority with multi-channel content partnerships to scale discoverability across answer engines. The brand doubled its AI share of voice from 22% to 45%, grew citations 59.4% month-over-month at peak, and validated video as a legitimate AI discovery channel with 660,000 branded views indexed by ChatGPT, Perplexity, and Gemini.

4 YOU DON'T NEED A BIGGER BUDGET. YOU NEED A SMARTER ONE.

Across AP's client portfolio, some partner verticals delivered more growth per commission dollar than others. The chart below plots each partner vertical by revenue growth and return per commission dollar, with bubble size reflecting total H1 2026 revenue.

GROWTH VS COMMISSION EFFICIENCY BY PARTNER VERTICAL



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AND HERE ARE THE INSIGHTS WE DISCOVERED FROM THE DATA

Growth isn't costing more.
Brands scaling their affiliate investment this year did not pay a premium to do it. That challenges the instinct that leaner budgets mean pulling back. The channel is absorbing growth without giving up efficiency.

Where the dollar goes matters more than how many dollars there are.
Two programs spending identical budgets can produce very different outcomes based purely on partner mix. For teams asked to do more with the same budget, reallocation is the biggest efficiency lever available, bigger than rate negotiation or volume growth. Smarter investments are key to efficiency.

Emerging verticals are getting more efficient as they grow.
The verticals we're advising brands to diversify into are simultaneously becoming more cost-efficient, which means diversification and efficiency are the same play, not competing priorities.

Efficiency gains came from quality, not volume.
Growth is coming from better-qualified traffic and stronger conversion. For budget-conscious brands, that reframes the performance conversation away from traffic volume and toward traffic quality.

An advertiser doesn't need coupon-site exposure to get coupon-site-level efficiency.
On efficiency, coupon/deal still returns well, so partners outside the open coupon/deal channel aren't universally more efficient. But the two highest-volume, highest-efficiency partners in that group, loyalty and BNPL, already match or slightly exceed coupon/deal's return.

HOW TO WIN THIS Q4

REPEAT THIS MANTRA: BRANDS WIN THE HOLIDAY SHOPPING SEASON MONTHS BEFORE CHECKOUT.

☑ DIVERSIFY YOUR PARTNER MIX WITH INTENTION

Coupon and deal partners still drive volume, but they cover a shrinking share of a much wider set of discovery channels. Build coverage across closed user groups, content, and creator partnerships that keep delivering value after Black Friday and Cyber Monday, and test emerging formats like connected TV; audio; and retargeting to reach customers your current mix doesn't.

☑ LEAN INTO CLO PARTNERS FOR EFFICIENT VOLUME

Use that efficiency to create budget room for testing lower-return, higher-upside partners elsewhere in your program.

☑ LOCK BUDGETS AND TIMING BY SEPTEMBER

With this timing, you can defend your share through Target Circle Week in October, then move into Cyber Five without reshuffling spend mid-season. Launch campaigns in October and run them through Thanksgiving and Cyber Five to capture early shopper attention before

☑ CUSTOMIZE YOUR DISCOUNT STRATEGY INSTEAD OF DEFAULTING TO IT

Consumers expect more than a blanket discount. Build a varied plan matched to brand goals, with backup offers ready and progressive promotions that build urgency as the season advances. Where you can't discount heavily, equip partners with messaging on cost savings, product longevity, bundles, or flexible payment options like BNPL instead.

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EXTEND THE HALO INTO JANUARY

Time your gifting and sampling partners to activate late in Q4, with some campaigns built to stretch engagement into January so you extend the holiday shopping instead of letting momentum drop off after Cyber Monday.

PRUNE PARTNERS AS YOU TEST NEW OPPORTUNITIES

Pair every new partner test with active pruning of underperformers. With this approach, you're testing new formats backed by data and reallocated budget, not just open spend. You'll reinforce the principle that where the dollar goes matters more than how many dollars there are.

USE INFLUENCERS ACROSS THE FUNNEL

These partners can generate authentic, evergreen content that you can repurpose across your owned and paid channels. Micro and mid-tier creators often offer strong engagement at a lower cost and may be open to hybrid compensation models, such as a low flat fee plus affiliate commission. These placements can support both upper and lower funnel performance.

INTERESTED IN LEARNING MORE ABOUT HOW YOU CAN STAND OUT THIS HOLIDAY SEASON?

PLEASE REACH OUT TO US AT:
ACCELERATIONPARTNERS.COM

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