THE WINNABLE SHOPPER

The Most Discerning Shopper in History
Is Coming for BFCM 2026
Here's How To Win Them
Without Overpaying for the Sale

blueconic

The 2026 Black Friday shopper is arriving with a point of view

They've asked AI what to buy. They've compared products, read reviews, checked prices, and narrowed their options before they engage with your brand directly.

They are on the lookout this year for recommendations that don't hit the mark, product information that conflicts, an unclear difference between two options, and offers aimed at questions they never asked. And they're far less likely to choose a brand just because they chose it before.

All of it happens out of your view.

What arrives on your site is a session. A few pageviews, a price check, maybe a cart. The work that produced it happened outside your measurement, and it ended much closer to a decision than anything in your data suggests.

So the visit reads as unresolved. And peak season teaches you exactly one way to resolve it.

It's easy to look at this shopper and reach the obvious conclusion: In 2026, they're harder to win and more expensive to convert, so you must give deeper discounts.

But that's where ecommerce teams will go wrong this year, and why controlling the decisioning behind each purchase choice is where they can win.

A shopper who's actively comparing is still actively deciding, which means they can be won. They're clocking the differences between brands, products, experiences, and offers, and giving brands their biggest revenue opportunity of the season.

In 2026, the most discerning shopper in history is also the most winnable. And the easiest one to overpay for.

Partial evidence, full conclusions

Brands are meeting shoppers later in the research process.

AI is part of that shift, yes, but it's only one piece of this new funnel.

Online marketplaces are now the primary research channel for 51% of consumers across the U.S., U.K., and Canada. Among younger shoppers, social platforms carry even more influence: 73% of Gen Z and 67% of millennials describe social media as a leading product-discovery channel, including TikTok.

The question is what that means for the shopper who finally arrives.

Adobe tracked more than a trillion visits to U.S. retail sites and found that AI-referred visitors converted at a rate 54% higher than everyone else and generated 53% more revenue per visit. A year earlier, that same traffic converted at roughly half the rate of everything else.

The gap closed because shoppers became more informed. Those who did their homework are more likely to buy this year, which presents an unprecedented opportunity for ecommerce teams and also a trap.

That shopper arrives closer to a decision than any other visitor on your site, and you cannot see a single step of how they got there.

Teams may see some interactions, but the sequences that produced them are obscured, so it's easy to misread familiar signals, like clicks on product pages signaling impending conversions, price checks reading as discount-hunting, and short visits in specific channels being assessed as disengagement.

2026 HOLIDAY RESEARCH TRENDS

51%

of consumers in the U.S., U.K., and Canada use online marketplaces as their primary research channel

73%

of Gen Z call social media a leading product-discovery channel-67% of millennials say the same

+54%

conversion rate for AI-referred visitors

When you can't see the work behind the visit, you also can't tell what the shopper needs next.

The discount reflex

So you guess. And the guess is almost always price.

Sometimes that's the right call. Just as often, however, the customer is looking for fit, proof, availability, delivery timing, product differentiation, or plain confidence in the choice.

Black Friday and Cyber Monday reward guessing price anyway. The default is to discount broadly and early, on the assumption that a stronger offer creates urgency, pulls more shoppers into the market, and settles the decision in your favor.

For some shoppers it does exactly that.

But many were already moving toward a purchase. And a blanket discount treats all of that effort as irrelevant. It assumes the open question is price, even when the shopper may already be comfortable with the price and weighing something else entirely.

That gets expensive fast.

Some shoppers genuinely need the full offer. But you don't need every shopper to. If you can better predict who needs 15%, who only needs 5%, and who doesn't need a discount at all, even recovering a fraction of that unnecessary discounting can materially change BFCM economics.

Yes. Discounts are central to the season. But they aren't the only way to win a shopper who's already close to choosing.

The problem starts when the discount gets applied before you understand whether price is actually what's holding the decision open.

In a world where high-intent shoppers get the same offer as uncertain ones, we're teaching customers who might have purchased at full price that waiting has value.

The offer may still produce the transaction, but it doesn't necessarily tell you what won the decision.

$1M

Margin at Risk

If a shopper only needed 5% off to buy, but you gave them 15%, you gave away another 10% of the sale without changing the outcome. Across $10 million in promotional revenue, that difference could represent as much as $1 million given away unnecessarily.

Every discounted sale looks like it was won by the discount. Some were won by a decision the shopper made, and you paid for them anyway.

Revenue that explains nothing

A strong promotion can make the plan look right.

1. Revenue rises.
2. Conversion improves.
3. The offer gets credit.

The result leaves three things open: how many shoppers needed the discount, how many were already likely to buy, and whether the right audience saw an offer that made sense for them.

It also leaves open whether clearer product information, stronger proof, better guidance, or a more relevant experience could have closed the same purchase with less margin loss. That uncertainty matters, because the next move is usually more of the same.

4.5%	29.9%	30.2%
said nothing about their approach had changed	are more likely to wait for a key sales event	compare more retailers before buying

SIMILARWEB - HOW U.S. HOLIDAY SHOPPING CHANGED VS. 2-3 YEARS AGO

That's a single shopper behaving two ways at once. More comparison, more patience, and every broad promotion teaches patience again and again.

Worse, if you never learn why they bought the first time, you have very little to work with when it's time to win the second or third purchase. So what happens then? Another discount?

Once the sale counts as proof that the discount was necessary, everything else that might have won the decision stays untested.

Discounts will remain central to the season. The opportunity is to be more deliberate about where they're actually needed, and to use the other moments already available to move the purchase without giving away more margin.

Next year's problem

The promotion starts earlier. It reaches more people. The customer becomes more discount-minded. What looked like a successful BFCM begins shaping the behavior you'll have to work against later.

You may win the transaction and still train the customer to wait. In fact, it already has.

Before adding another incentive, identify what's between the shopper and a confident purchase Sometimes it comes down to price, sure. But it can also be informational: understanding the difference between products, confirming fit, finding actual proof, checking delivery timing, or navigating too many credible options. Your peak-season plan should give you more than one way to remove those barriers.

Seven places the BFCM 2026 decision is still visible, and winnable

Your offers, campaigns, and budgets are locked for BFCM. The plan is set, the roadmap is committed. What's still open is which of these seven moves you make before the big weekend.

Where are you defaulting to a discount before you know price is the problem? Where does a shopper have to work too hard to compare products, understand the difference between SKUs, or feel confident in the choice? Where are high-intent shoppers receiving the same message as casual browsers?

This is how you find out.

01

Diagnose carts before you discount

Cart abandonment often gets treated as one event with one response: someone leaves, a message follows, a coupon appears.

Carts are abandoned for many different reasons, so the better question is what would actually complete this one.

For one shopper, it may be more product proof. For another, clearer availability, a reminder about something they considered, a complementary product, or a credible alternative. In some cases, the answer may still be a discount.

The key is using what you know about the shopper, the products they considered, and their past behavior to determine the next best action most likely to get them to convert.

A discount can still be part of the recovery. It just doesn't need to be the default or larger than it needs to be.

Make it make sense

Does the recommendation make the purchase feel more complete, or just make the checkout page busier?

02

Recover margin on the way to checkout

Once someone is preparing to purchase, there are still ways to improve the economics of the transaction without discounting the original product further.

A relevant bundle, complementary item, upgraded configuration, or threshold benefit can increase the value of the order while giving the shopper a more complete solution.

This becomes especially important when an incentive was required to close the original purchase. A relevant add-on, bundle, or threshold can help recover some of that margin without reducing the original product's price further.

It should connect to the product, the cart, the shopper's known preferences, or what they're likely to need next. Relevance is what keeps the moment calm while the customer is trying to finish.

03

Catch intent while it's still visible

So much of peak season traffic is anonymous, but that doesn't make the behavior meaningless. A variety of signals distinguish casual browsing from a purchase decision already in motion.

It's key to capture and use those signals before the shopper's context is lost.

Group visitors by the strength and type of intent they are showing, suppress recent purchasers from unnecessary acquisition spend, and change the next interaction when someone repeatedly returns to the same product or category.

04

Ask for more, give back immediately

A single email address tells you very little about why someone is actually shopping. Asking for more during BFCM works when the shopper gets something useful in return.

The exchange has to be clear: tell us a little more, and we'll make this easier and better for you. That value could be a better recommendation, a faster path to the right product, more relevant guidance, or even fewer options to sort through.

Someone comparing skincare may share their skin type if it produces a routine that actually fits their needs. A customer shopping for apparel may offer up fit or style preferences if it helps them find the right option faster.

Learn through short questions, preferences, comparisons, and behavior. Then use each answer immediately: change the products shown, reorder recommendations, narrow the assortment, or provide guidance to make the next step easier.

When the shopper can feel the value of the exchange, the question becomes part of the service.

05

Close first-time buyers with proof vs. price

First-time shoppers often convert differently from returning customers. Especially during peak season.

They're still building the history, familiarity, and trust returning customers bring to the table. They might need stronger proof of product quality, clearer comparisons, greater confidence in fit or compatibility, and reassurance around delivery, returns, or customer support.

Look at the behavior. Has the shopper returned several times? Are they repeatedly viewing one category? Are they comparing products but not moving forward? Are they spending time with reviews, sizing information, ingredients, delivery details, or return policies?

Those signals shape your response. A more useful recommendation, clearer product proof, better comparison content, or a selective first-purchase offer can each move the decision forward as quickly as a deep discount.

06

Compete in the comparison

Your product information is a comparison tool now, whether you treat it as one or not. Shoppers compare across AI, marketplaces, retailer listings, social platforms, search, and your own site, and the clarity of what they find there is part of the purchase decision.

1. Start with the places you can influence today. Then, review how the products and SKUs you expect to drive peak are described across your site, product feeds, marketplace listings, retailer content, and the other places customers are likely to compare them.

2. Look for missing attributes, conflicting descriptions, outdated availability, unclear differences, and language that makes your product harder to understand than a competitor's.

3. Pay particular attention to product names, claims, imagery, compatibility information, availability, and the attributes shoppers use to distinguish one SKU from another. These are also the details AI systems, search engines, marketplaces, and retail partners may rely on when comparing or recommending products.

07

Curate instead of catalog

Your assortment is at its largest during peak, and your shopper has the least patience for it.

A category page with forty credible options hands the comparison work to the shopper. Filters only help someone who already knows which attributes matter. (Gift shoppers rarely do.)

Guided selling narrows the assortment before the shopper has to. Ask what eliminates options. Who it's for, fit, skin type, compatibility, budget, delivery timing. Then show the short list and say why those products. Because at the end of the day, a recommendation the shopper can't evaluate sends them back to browsing.

Every one of these actions leaves discounts in place for BFCM. They also give you other ways to influence the purchase. The harder part is recognizing which action fits the shopper, the moment, and the result you're trying to improve.

Win by decision

The most discerning shopper in history will arrive in the 2026 holiday season researched and ready.

They're comparing. Narrowing. Returning. Checking one last detail. Deciding whether your product deserves the purchase.

Black Friday and Cyber Monday give you every reason to discount. That's kind of the whole point. And some shoppers will need one. But others need clearer information, stronger proof, a simpler choice, or an experience that recognizes how close they already are.

When deeper discounts become the answer for everyone, you lose the ability to tell those two groups apart. Demand you created and demand that was already moving toward you arrive at checkout looking identical, and you pay the same price for both.

That's where the margin goes. It's also where the next relationship starts, because a customer who bought for a reason you can name is a customer you can win again.

The shopper has already invested the effort. The question is whether your BFCM strategy recognizes that effort or pays again for demand you already earned.

Get the Won by Decision Checklist

Run the seven-point checklist against the plan you already have and uncover where you're about to pay twice when you don't have to.

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