Sprout Social Q4 2025 Pulse Survey Analysis

Holiday Campaign Timing

With pumpkin spice lattes dropping before Labor Day, we couldn't help but ask—how early is too early for holiday campaigns? Most social users are unbothered by the Christmas in August approach—and nearly half say they're more likely to buy from brands that get this message out early.

- 44% of social users say they are **more likely** to buy from brands that launch their fall and winter (e.g., holiday/Christmas) marketing campaigns as early as August.
    - This goes up to 63% for Gen Z, 53% for Millennials and 60% for Black social media users.
    - 38% of all respondents say the campaign timing has **no impact** on their likelihood to buy.

- 45% of social users think brands should launch holiday campaigns between August/September, and 38% say between October/November.
    - 35% of Australians say brands should launch these campaigns whenever they want, compared to 13% of all consumers.

🛍️ Holiday Shopping + Product Discovery

Social media is a top-two source for holiday gift inspiration and product discovery this holiday season—so it's no surprise 8 in 10 users plan to rely on it more this year than last.

Family and friend recommendations on social remain the most trusted source for the third year in a row, while influencers' impact has taken a back seat to user-generated comments. Audiences are only savvier to the influencer game. An influencer cosign may be enough to spark an

impromptu purchase for themselves, but people want validation from other consumers when shopping for loved ones.

As tariffs force nearly half of all users to reign in holiday purchases, they're most likely to spend their money with brands who offer promo codes and high quality customer service—not necessarily those with the most original campaign content.

Where social users are most likely to turn for holiday gift ideas / product discovery
1. Physical stores - 49% 2. Social media - 45% 3. Recommendations from friends/family - 35% 4. TV - 26% 5. Review sites - 22% 6. Print/digital media - 14% 7. AI chatbots - 12%

Gen Z	*Millennials*	*Gen X*	*Baby Boomers*
1. Social (57%) 2. Stores (37%) 3. Friends/family (35%)	1. Social (56%) 2. Stores (46%) 3. Friends/family (33%)	1. Stores (56%) 2. Social (39%) 3. Friends/family (34%)	1. Stores (58%) 2. Friends/family (37%) 3. TV (29%)

- Compared to the 2024 holiday season, 80% of social users plan to use social **as much if not more** to find gifts. (41% more, 39% the same as last year)
    - 63% of Gen Z and 51% of Millennials plan to use social more.

Most trusted sources on <u>social</u> for holiday gift ideas / product discovery
1. Family/friends - 56% 2. User comments on social media - 38% 3. Brand social accounts; Influencer recommendations - 35% 4. Paid social ads - 21%

- UK users are <u>more</u> likely than average to trust brands' social accounts (43% v. 35%)
- US users are <u>less</u> likely than average to trust brands' social accounts (27% v. 35%)

Gen Z	*Millennials*	*Gen X*	*Baby Boomers*
1. Family/friends (55%)	1. Family/friends (57%)	1. Family/friends (56%)	1. Family/friends (53%)

2. Brand social accounts; Influencer recs (38%) 3. User comments (36%)	2. Influencer recs (40%) 3. User comments (38%) 4. Brand social accounts (34%)	2. Brand social accounts; User comments (37%) 3. Influencer recs (30%)	2. User comments (46%) 3. Brand social accounts (26%)

Impact of Brand Content on Likelihood to Buy During the Holidays
1. Promo codes that the company or an influencer shares on social media - 28% 2. The quality of the company's social media customer service - 27% 3. Content from regular social media users (not influencers) - 24% 4. Social media does not impact my likelihood of purchasing from a company - 23% 5. Organic posts from a brand showing their product or service in action; The originality of their holiday-specific social media content - 21% 6. Targeted social media ads from the company - 20%

- 44% of all social users plan to reduce their holiday spending due to tariffs. 27% are unsure.

- 47% of social users plan to buy mostly from companies they have shopped with before this holiday season. 35% plan to buy from a mix of companies they have and haven't shopped with before.
    - Asian (25%), Black (24%) and Latino (27%) users are more likely to research and buy mostly from companies they haven't shopped with before (18% global average).
    - Gen Z (28%) and Millennial users are also more likely to research/buy from companies they haven't bought from before.

- Top types of gifts social users plan on buying this season
    - Clothes - 51%
    - Toys - 35%
    - Jewelry/accessories - 34%
    - Consumables (food, drinks) - 31%
    - Electronics; Games - 30%
    - Restaurant gift cards - 27%
    - Books - 23%
    - Experiential items (e.g., concert or sporting event tickets) - 16%
    - Travel - 13%

- Spa services - 10%
- Donations - 9%
- Top write-in option: Home goods/home decor

💬 Holiday Customer Care on Social

Social continues to be a hub for holiday season customer care, with almost two-thirds of users planning to rely on it more. While Facebook and Instagram remain core channels for holiday care, Bluesky has quickly surged to the top, dethroning TikTok and X.

Continuing a trend from the last couple years, most users are likely to reach out to brands via DM. But when they do call out a brand publicly, they expect public acknowledgement (even if the conversation eventually shifts to a private, 1:1 space).

Most social users (69%) are still comfortable with brands relying on AI to deliver faster or more personalized care—particularly younger generations—but even this has dipped slightly compared to early 2024.

- Compared to the 2024 holiday season, 65% of users plan to use social **as much if not more** to get customer service questions answered. (31% more, 34% the same as last year)
    - 45% of Black users, 44% of Gen Z and 39% of Millennials plan to use social more.

Networks social users are most likely to contact brands during the holidays (based on where they already have accounts)
1. Facebook - 50% 2. Instagram - 32% 3. Bluesky - 28% 4. TikTok - 24% 5. YouTube - 15% 6. WhatsApp - 14% 7. X - 10% 8. Snapchat; Pinterest - 8% 9. LinkedIn - 7% 10. Reddit - 4% 11. Threads - 3%

Gen Z	*Millennials*	*Gen X*	*Baby Boomers*
1. Instagram - 62%	1. Facebook -	1. Facebook -	1. Facebook - 74%

2. TikTok - 54% 3. Facebook - 51% 4. X - 34%	54% 2. Instagram - 58% 3. TikTok - 51%	60% 2. Instagram - 42% 3. TikTok - 40%	2. TikTok - 37% 3. WhatsApp, YouTube - 33%

- 73% of all social users are likely to use social to contact a brand during the holiday season. They are most likely to contact brands on social via DMs this holiday season (49%), followed by comment sections (27%).
    - Gen Z (28%) and Millennials (24%) are more likely than average (18%) to tag or @-mention a brand publicly.
    - Gen Z is also more likely to reach out via story replies (25% v. 15% overall).

- When users reach out to a company on social in a public way (e.g., @-mention or in the comments), 51% expect an initial response in that same public setting, and then to move the conversation to a private one (e.g., DMs).
    - Only 32% of all users expect a response in the same public setting.

- 69% of users are comfortable with companies using AI (e.g., chatbots, or tools to help human employees refine their responses) to deliver faster customer service on social media.
    - This rises to 78% each for Gen Z and Millennials

🔮 2026 Predictions

Audiences have made it clear: they're fatigued by the algorithms, AI and always-on discourse. In 2026, they want social to feel less toxic and more human. More people-to-people than machine-to-masses.

From a brand standpoint, users want companies prioritizing human-generated content, along with personalized customer service and surprise-and-delight moments. And while nearly 90% feel brands do a good job of listening to their audiences on social, 55% don't think they do enough to act on these insights.

On the network side, users are less concerned with having new content formats to consume. Rather, they crave safer spaces and more agency over their entire experience (something Instagram is already testing).

- 55% of all users say most companies do a good job of listening to what audiences say on social media, **but they don't always act on those conversations / feedback**.

- Only 31% say companies do a good job of listening to what audiences say on social media, AND acting on those conversations / feedback.

Networks users plan to use <u>more</u> or start using in 2026
1. Facebook - 39% 2. Instagram - 32% 3. YouTube - 30% 4. TikTok - 27% 5. WhatsApp - 19% 6. LinkedIn, Pinterest, X - 14% 7. Snapchat - 12% 8. Discord, Reddit - 9% 9. Threads - 7% 10. Bluesky - 5%

Gen Z	*Millennials*	*Gen X*	*Baby Boomers*
1. Instagram - 41% 2. TikTok - 39% 3. Facebook - 35% 4. YouTube - 38%	1. Facebook, Instagram - 42% 2. TikTok - 33% 3. YouTube - 32%	1. Facebook - 40% 2. YouTube - 32% 3. Don't plan to use any networks more - 28% 4. Instagram - 25%	1. Facebook - 40% 2. Don't plan to use any networks more - 36% 3. YouTube - 26%

What users want <u>brands</u> to prioritize on social in 2026
1. Prioritize human-generated content - 32% 2. Personalized customer service on social media; Surprise-and-delight moments (e.g., sending free product or a custom gift based on a user's post) - 28% 3. Selling products directly through social platforms - 21% 4. Interacting with audiences in smaller digital spaces (e.g., IG Broadcast Channels, Reddit AMAs) - 19% 5. Collaborations or campaigns with other companies - 17% 6. Investing in social media content that tells a story over multiple episodes or posts - 16% 7. Long-term collaborations w/influencers; Experimenting with AI-generated content - 15%

Gen Z	*Millennials*	*Gen X*	*Baby Boomers*
1. Interacting in smaller spaces; Surprise and	1. Human-generated content; Personalized	1. Human-generated content (33%)	1. Human-generated content (38%)

delight (28%) 2. Human-generated content (26%) 3. Collabs w/other companies; Selling products on social (25%)	customer service (31%) 2. Surprise and delight (28%) 3. Interacting in smaller spaces; Selling products on social (24%)	2. Personalized customer service (30%) 3. Surprise and delight (29%)	2. Personalized customer service; Surprise and delight (24%) 3. Experimenting with AI-generated content (12%)

What users want <u>platforms</u> to prioritize on social in 2026
1. Data privacy and security protections - 37% 2. Fewer ads / more control over ads I see - 36% 3. Stronger content moderation (removing or reporting harmful material) - 27% 4. Better ways to connect with family and friends - 26% 5. Tools for mental health and digital well-being (screen time mgmt) - 24% 6. More entertaining content formats; Smarter algorithms to help discover new content, products, or influencers - 20% 7. Features that make it easier for brands to interact with audiences in smaller digital spaces - 19% 8. Social commerce tools (within platforms) - 15%

- Gen Z (24%), Millennials (24%) and Black social users (26%) are slightly more likely than average to want features that support interaction in smaller spaces (19%)
- Millennials (26%) and Black users (28%) are more likely than average to want smarter algorithms (20%)
- Gen Z (29%) and Black users (29%) are more likely than average to want better tools for mental health (24%)

- Personal goals users will prioritize in 2026
    - Improving physical health - 50%
    - Improving mental health - 39%
    - Traveling more; Saving up for a large investment (car/house) - 30%
    - Reading more - 23%
    - Picking up a new hobby - 21%
    - Finding a new job; Going to more in-person events (20%)

💃 To post or not to post: The Life of a Showgirl

October 3 is a big day—not because of Mean Girls or Daniel Day-Lewis' return to acting. The Life of a Showgirl drops that Friday, with brands already jumping on the hype (see: KitchenAid, Stan's Donuts, Funfetti). Audiences are OK with brands getting in on the glamour, so long as the product tie-in is clear.

- 69% of all social users think brands should post about TS12, but of this group, 44% think it has to be relevant to a company's product or service.
    - Only 31% say brands shouldn't jump on this release.
    - Gen Z (35%) and Millennials (31%) are more likely than average (25%) to think any company can post about TS12.

Methodology

Full crosstabs

Methodology: This consumer survey was conducted online by Panoplai, a global market research firm, on behalf of Sprout Social. Participants included 2,270 social media users across the US, UK and Australia. The survey was conducted from September 25 to September 28, 2025.

Demographic Highlights:

- Country: 1,002 US, 1,000 UK, 268 AUS
- Ages
    - 524 Gen Z
    - 684 Millennial
    - 593 Gen X
    - 468 Boomers
- Gender
    - 1,119 Female
    - 1,150 Male