



2025 Holiday Trends

Forecast for 2025 & A Look Back at 2024

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5 Must-Know Insights for Brands Preparing for the Holiday Season

1

Stricter budgets,
but higher
spending overall

2

The new
administration is
shaping mindsets

3

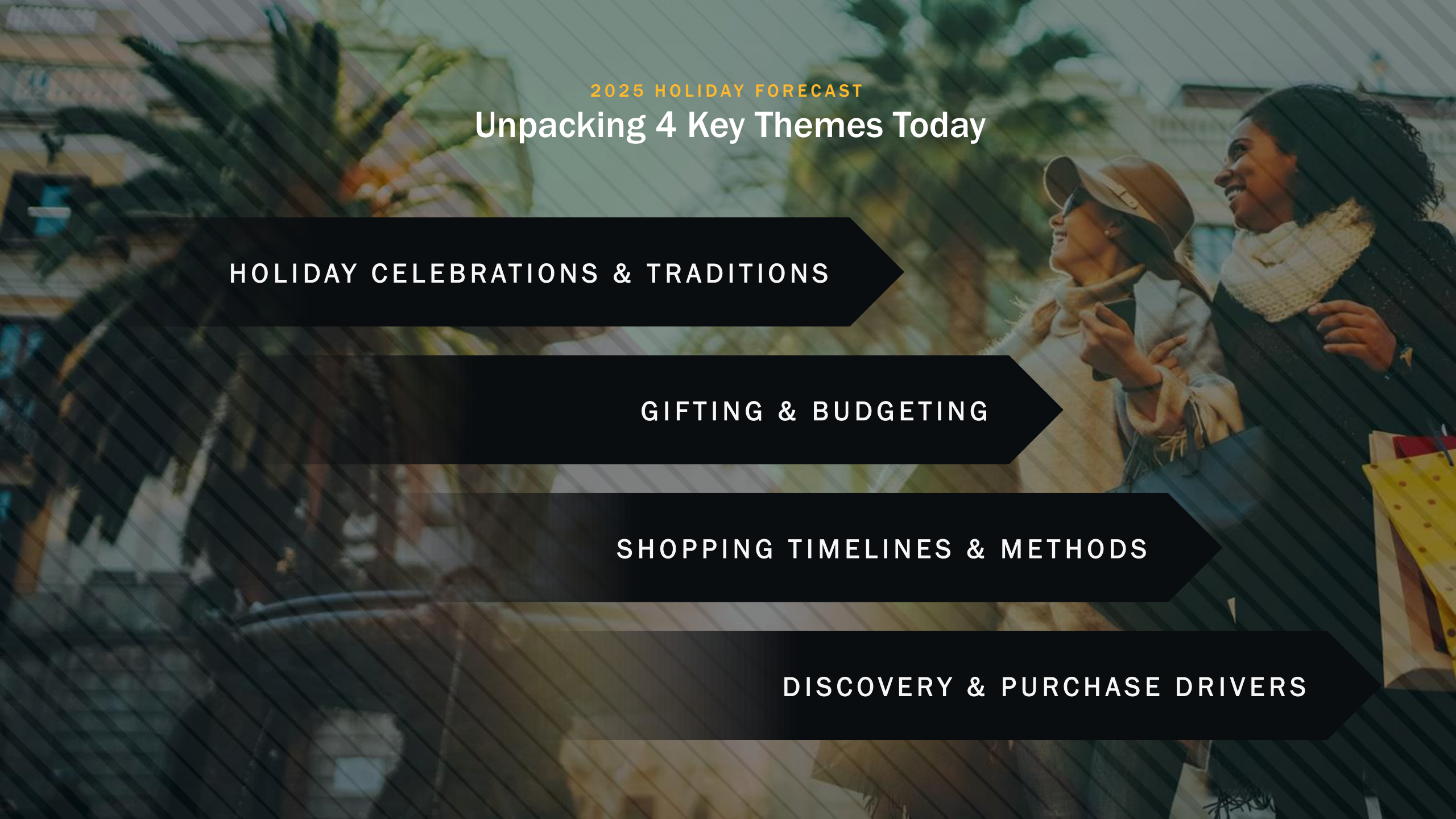
Retailer boycotts are
becoming behavior,
not just belief

4

Search and social
are gaining ground in
discovery

5

Shopping events
matter less so timing
is more personal

A background image showing two women walking and shopping in a city street. One woman is wearing a brown hat and sunglasses, and the other is wearing a white scarf. They are both smiling and looking towards the right. In the background, there are palm trees and buildings.

2025 HOLIDAY FORECAST

Unpacking 4 Key Themes Today

HOLIDAY CELEBRATIONS & TRADITIONS

GIFTING & BUDGETING

SHOPPING TIMELINES & METHODS

DISCOVERY & PURCHASE DRIVERS

Key Themes

HOLIDAY CELEBRATIONS & TRADITIONS

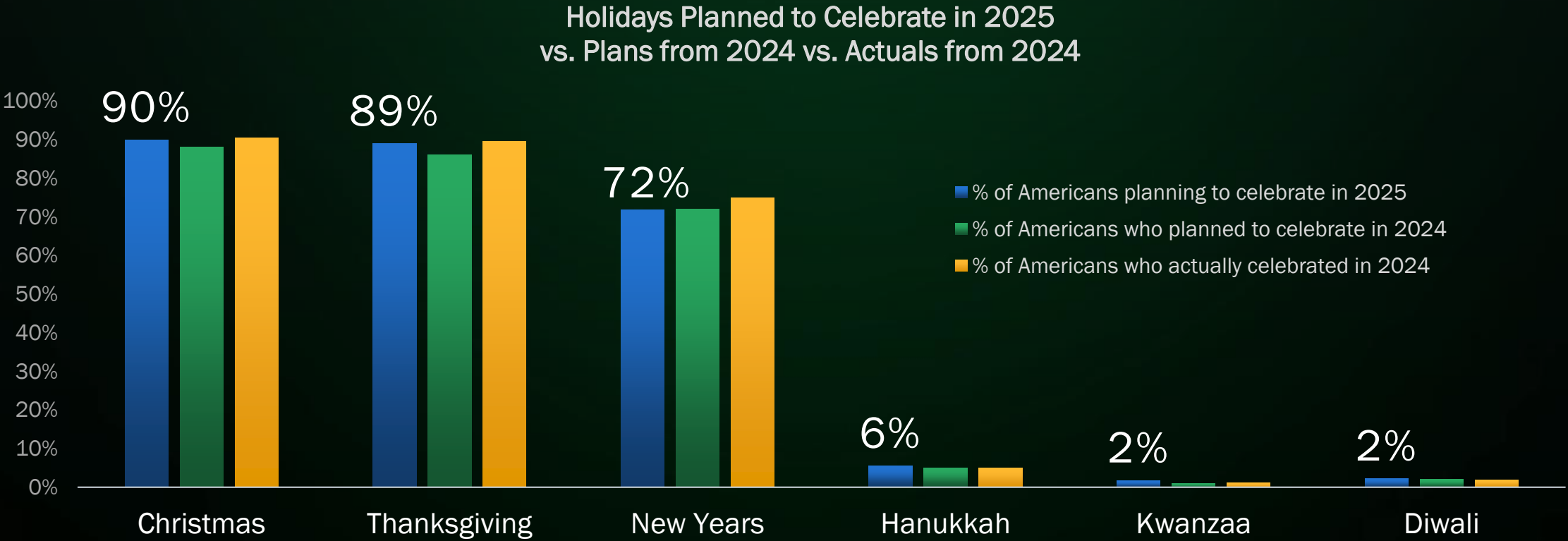
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graph TD; A[HOLIDAY CELEBRATIONS & TRADITIONS] --> B[Widespread winter holiday participation persists]; A --> C[Holiday behaviors are rooted in tradition and stability]; A --> D[Holiday traditions are personal, and consumers expect brands to reflect that];
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Widespread winter holiday participation persists

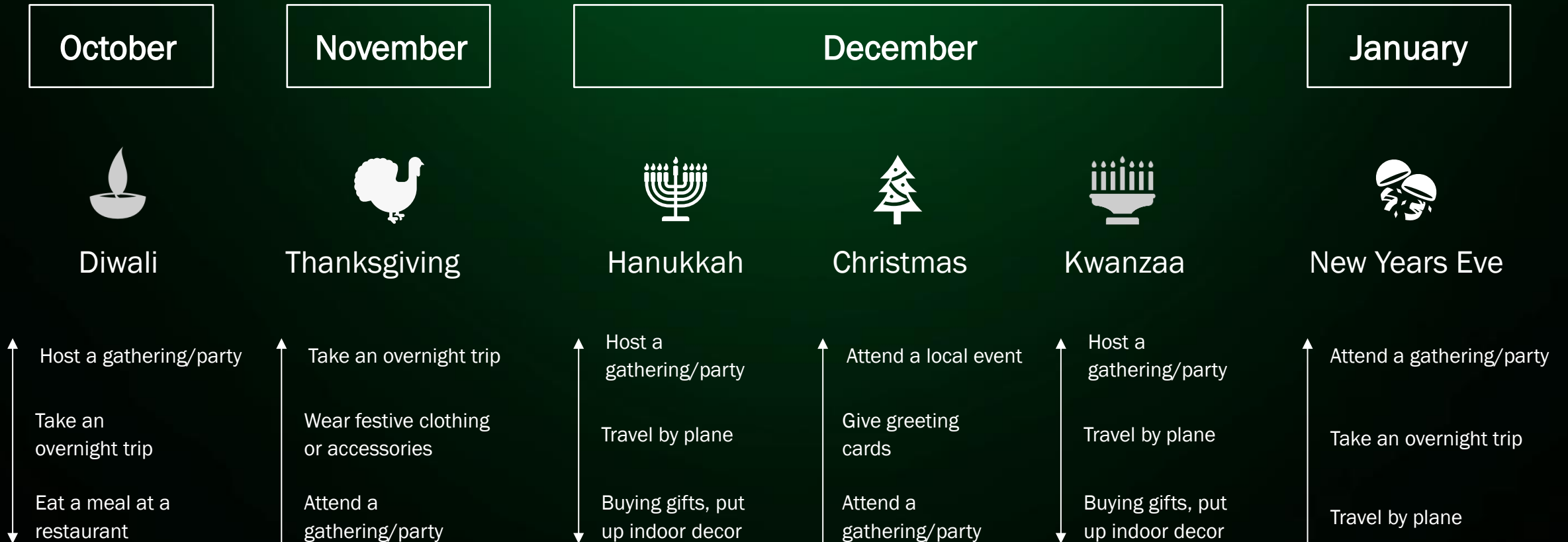
Holiday behaviors are rooted in tradition and stability

Holiday traditions are personal, and consumers expect brands to reflect that

Holiday celebrations will remain a near-universal trend



How Consumers Are and Aren't Celebrating



Holiday traditions are deeply personal. Consumers are looking for brands to reflect that.

65%

like to share holiday traditions with kids in their family

57%

believe holidays they celebrate are an important part of their identity

50%

enjoy holiday traditions from their favorite brands

54%

appreciate when brands change their branding to represent different winter holidays during the season

44%

say brands need to recognize more holidays from a variety of cultures

Key Themes

GIFTING & BUDGETING

Gift giving drives holiday shopping

Gift priorities and budgets differ sharply by holiday

Holiday shoppers will walk the line between budgeting discipline and increased spending

2025 HOLIDAY FORECAST

Gift giving remains a core part of holiday celebrations,
especially for Christmas and Hanukkah

Shoppers are buying for fewer people



Christmas remains
the gifting holiday.

75%
plan to buy gifts.

CHRISTMAS

53%
gift for
1-6 people

HANUKKAH

84%
gift for
1-6 people

KWANZAA

65%
gift for
1-6 people

DIWALI

73%
gift for
1-6 people

*41% of which
will only gift for
1-3 people*

Who consumers buy for and how much they spend varies widely

CHRISTMAS

INNER CIRCLE:
FAMILY + FRIENDS

- 52% parents
- 58% children
- 54% significant other
- 45% siblings
- 42% friends

HANUKKAH

KIDS AND SIGNIFICANT OTHER

- 71% children
- 61% significant other
- They do not buy for
their parents (32%) or
siblings (34%)

KWANZAA

FRIENDS OVER FAMILY

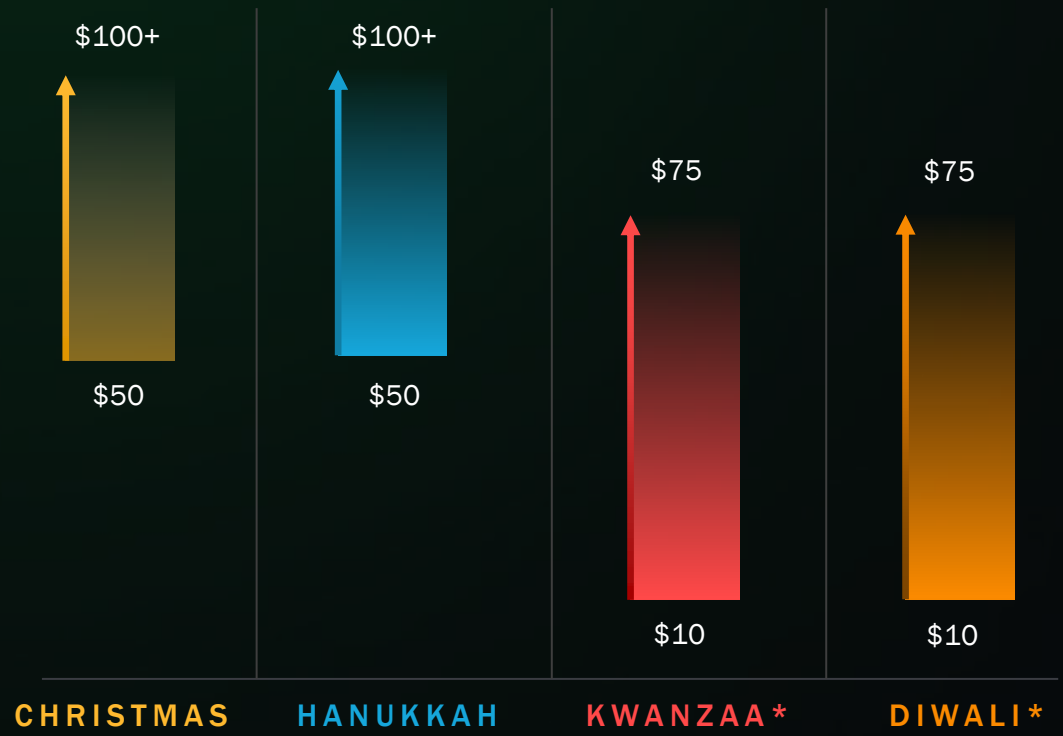
- 77% friends
- 65% significant other
- 67% children

DIWALI

- 84% children
- 68% friends
- 59% parents

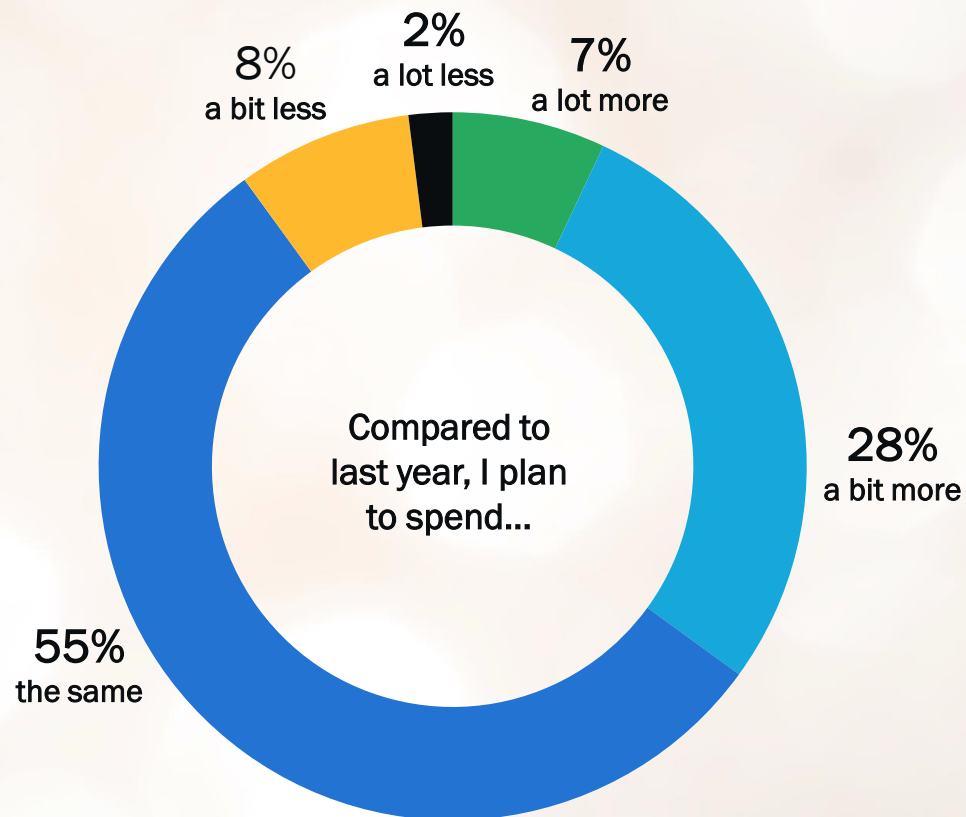
Who consumers buy for and how much they spend varies widely.

Amount Gift Buyers Plan to Spend Per Gift



Shoppers are setting stricter budgets even as many plan to spend more this holiday season

**2025 Anticipated Changes in Holiday Gift Spending,
Among Holiday Gift Givers**



68%

believe it is important to set a budget for gift buying

57%

plan to set a budget for winter holiday shopping and actually stick to it

49%

want to spend the least amount of money as possible on gifting



Economic and political uncertainty retains a strong hold on holiday shoppers and spending.

Reasons for Anticipated Uptick in Holiday Spending
*Among those likely to **Increase** spend*

62%

Inflation has driven prices up, so my usual gifts cost more

22%

I have more people I plan to shop for this year

18%

There are more expensive items I plan to gift this year compared to last year

11%

I have fewer expenses than last year, so I have more money available for gifts

11%

I am spending more money since I am less worried about the economy than last year

Economic and political uncertainty retains a strong hold on holiday shoppers and spending.

Reasons for Anticipated Changes in Spending for 2025 Holiday Gifts

Among those likely to **decrease** spend

41% of 2025 holiday gift givers say that recent political changes (e.g., newly elected officials taking office, newly introduced policies) have changed their outlook on holiday spending

55%

I am saving money because I am worried about the economy

53%

I'm uncertain about the future, so I don't want to spend a lot

46%

I'm worried about entering a recession

36%

I'm worried about social/political events affecting my finances

36%

I have more expenses that need to be prioritized over gifts this year

2025 HOLIDAY FORECAST

Key Themes

HOLIDAY SHOPPING TIMELINES & METHODS

Holiday shopping
will start early and
stay active
for longer

Cyber Week
feels less
essential in an
always-on deal
season

Holiday shoppers
embrace a
blended online
and in-store
journey

Social
commerce is
emerging as a
new frontier in
holiday gifting

2025 HOLIDAY FORECAST

Holiday shopping continues to start early requiring brands to keep pace with an extended holiday season

2025 Planned Holiday Shopping Timeline, by Holiday Celebrated



shop early to avoid shipping delays



want to get all of their shopping done as fast as possible



shop throughout the year to take advantage of sales



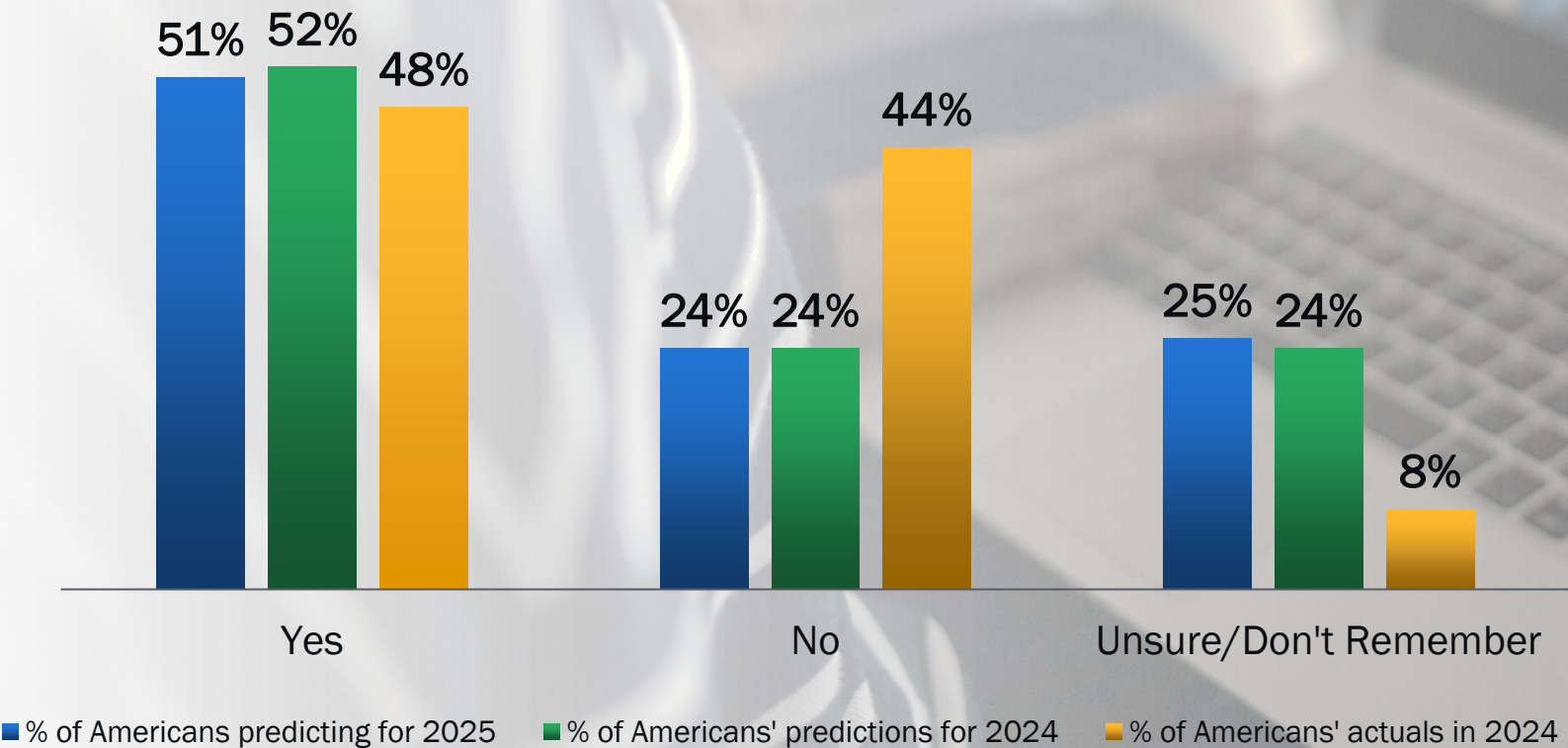
shop earlier now because they're concerned items they want will be out of stock



believe the longer they wait to shop, the better deals they will get

Black Friday & Cyber Monday are losing their urgency

Black Friday & Cyber Monday Participation Plans for 2025 vs. Plans from 2024 vs. Actuals from 2024



Among those not planning to shop Cyber Week this year,

46%

say it's because they will be done with their shopping by then

55%

say it's not critical to shop on Black Friday or Cyber Monday because they can get good deals at any time during the winter holiday season

Holiday gift shopping continues to be a hybrid, cross-channel experience

Among gift buyers in 2024...

90%
purchased
gifts **online**

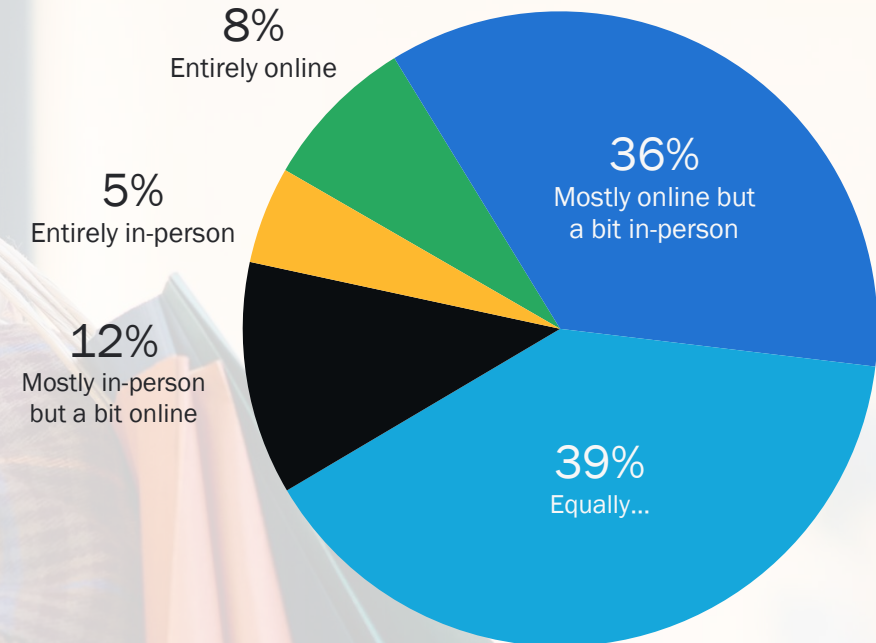
68%
purchased
gifts **in-store**

On Black Friday & Cyber Monday in 2024...

83%
bought online
& shipped

37%
Purchased
in-store

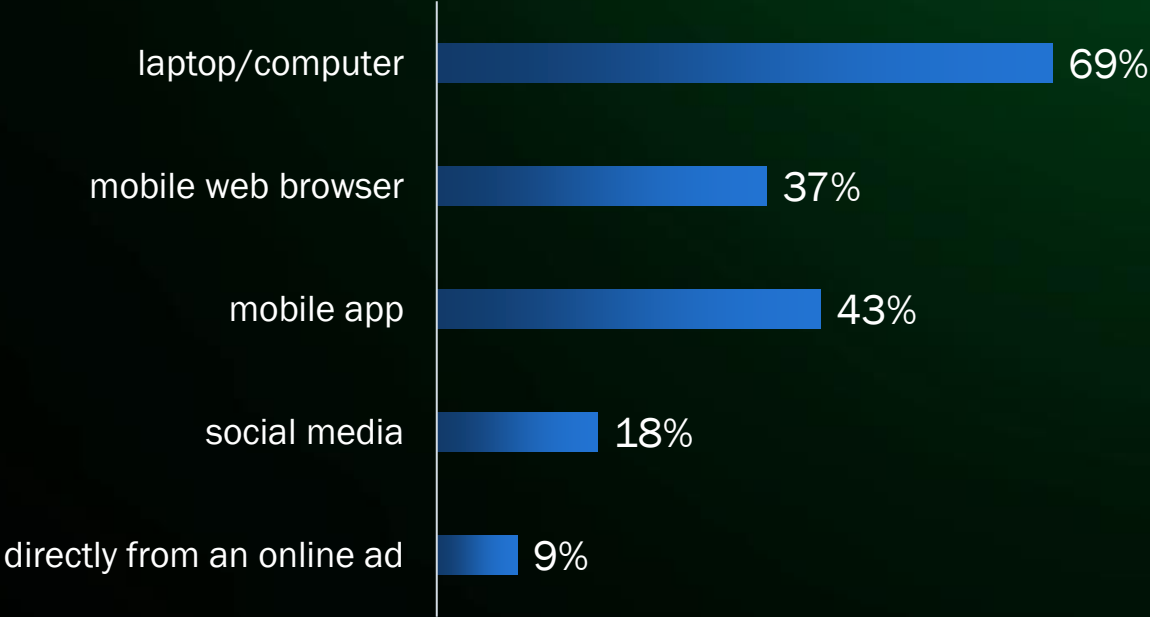
Gift Purchase Locations in 2025, Among Gift Buyers



2025 HOLIDAY FORECAST

Online shopping for holiday gifts is the norm and social media buying is poised to be next.

Anticipated Ways to Shop & Purchase Gifts Online in 2025



■ % of those planning to shop online for gifts in 2025

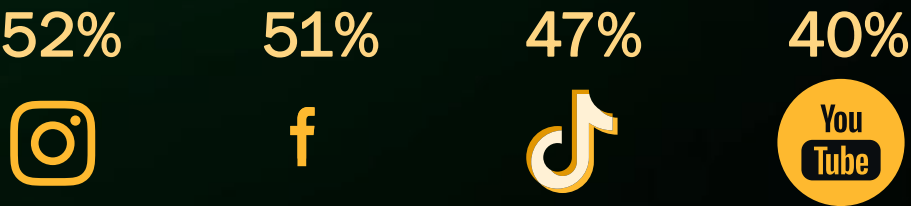
Likelihood to Purchase Gifts Directly Through Social Media in 2025

Share of each generation’s gift givers likely to purchase directly through social media...



Among Those Likely to Purchase Gifts Through Social Media in 2025

Share purchasing through each channel...



Shoppers are purchasing from a mix of retailer types, including a growing share turning to low-cost platforms, like Shein and Temu



of shoppers prefer retailers that help them find unique gifts



like when retailers provide suggestions for gifting or décor



enjoy participating in experiences that stores and malls offer during the holidays



are open to participating in virtual shopping events during the holidays

Key Themes

DISCOVERY & PURCHASE DRIVERS

Value, discovery,
and variety drive
holiday retail
choices

Practicality and
price lead holiday
gift decisions

Digital platforms
shape gift
discovery,
especially for
younger shoppers

Tech is the
holiday helper
shoppers rely on

2025 HOLIDAY FORECAST

**Practical gifts are often most popular,
and price is the biggest influence behind them**



2025 HOLIDAY FORECAST

Price, Promotion, and Word of Mouth Influence Gifting Ideas + Purchase



Holiday shoppers are value seekers and deals will drive their decisions this holiday season



45%

prefer to use their loyalty/rewards account when shopping for the holidays



50%

will be influenced to purchase an item from an online retailer that offers free shipping options



51%

say sales & promotions will influence their gift choices this year

17%

Will join a retailer's loyalty program to receive a discount when shopping for the holidays

49%

want to spend the least amount of money as possible as gifting

25%

anticipate purchasing more gifts from low-cost online retailers this year

2025 HOLIDAY FORECAST

Gift inspiration comes from everywhere,
but value dictates what gifts buyers will choose



Younger shoppers are letting social media and ads guide their gift buys



SOCIAL MEDIA as an Influence for Gifts

Gen Z: Index 225
Millennials: 160
Gen X: 54
Baby Boomers: 25



ONLINE ADS as an Influence for Gifts

Gen Z: Index 104
Millennials: 132
Gen X: 104
Baby Boomers: 60



TV & STREAMING ADS as an Influence for Gifts

Gen Z: Index 80
Millennials: 145
Gen X: 91
Baby Boomers: 82

2025 HOLIDAY FORECAST

Holiday shoppers are using tech to stay on track and discover the right gifts

39%

say online tools are essential for helping to get organized for the winter holidays

28%

say social media is an essential resource for winter holiday shopping

32%

are more likely to buy items that appear higher on a search results page from a retailer

16%

believe AI will be helpful to find gift ideas

2025 HOLIDAY FORECAST

Brand values are becoming a core part of the purchase criteria

60%

shop local or small
businesses to
support
communities

34%

like to buy from
female or minority
owned
brands/stores

42%

believe brands
should have clearly
stated values

41%

will stop buying from a
retailer that doesn't
align with their
personal values

30%

plan to switch to a
brand/retailer that
better aligns with
their values this year

Last year's lessons reveal where brands can do better for the 2025 holiday season

Still, there are many pain points that were experienced last year which shoppers would like to avoid in the upcoming holiday season

39%

of holiday shoppers in 2024 had no issues they experienced while shopping

38%

High Prices

21%

Slow Shipping

20%

Limited Stock in Stores

19%

Difficulty Coming Up With Gift Ideas

18%

Crowded Stores

6%

Lost or Damaged Packages



1

Emotions Drive Gifting,
But Caution Sets the Tone

2

Tradition Meets Practicality

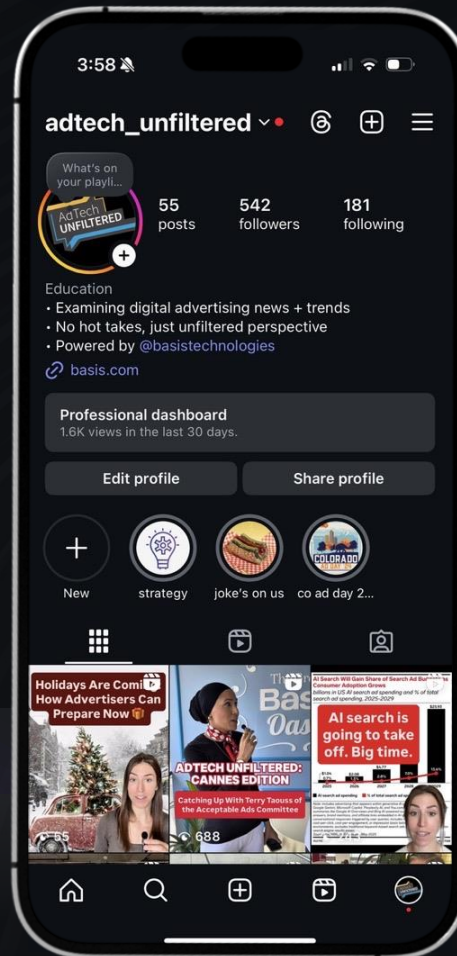
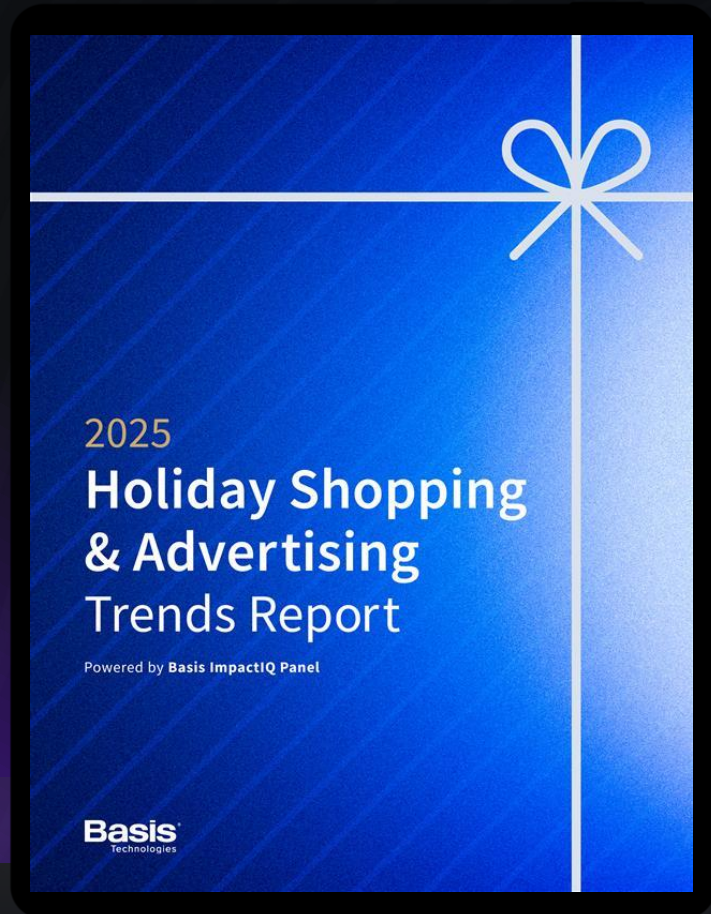
3

Digital Discovery Is Key

4

Authenticity Wins

WHAT ELSE?



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Thank you.