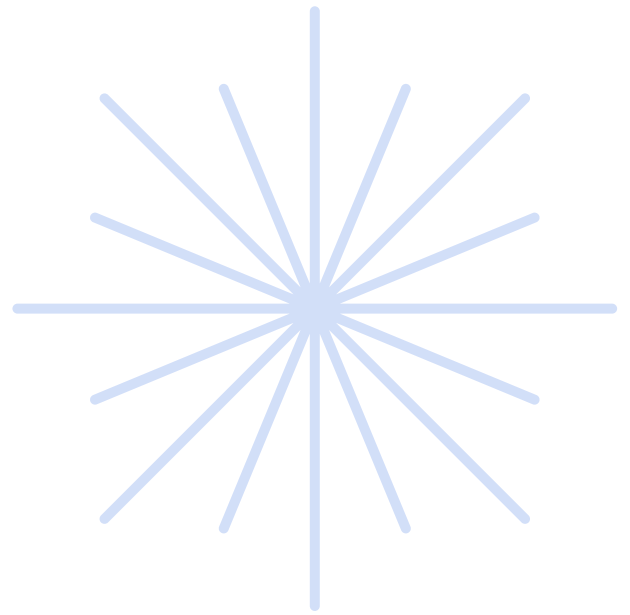




2025

Holiday Shopping & Advertising Trends Report

Powered by **Basis ImpactIQ** Panel



INTRODUCTION

It's the most wonderful time of the year—for revelers, shoppers, and brands alike.

The holiday shopping season is more than just a time for great deals. It's when advertisers do some of their most important work, with marketing efforts that can help fuel key sales and end the year on the right foot." to "with marketing efforts that can fuel key sales and help end the year on the right foot..

Looking for an edge with your Q4 campaigns? This in-depth research report, based on a survey of 2,000 US consumers age 16+ and conducted in partnership with GWI, provides valuable insights into the evolving landscape of holiday shopping—giving you a strategic advantage when planning and fine-tuning your advertising efforts for the 2025 holiday season.

Here's a look at 15 trends that are set to shape holiday shopping and advertising in 2025.

TREND #1

To keep the customer satisfied, learn from last year's pain points.

Want to give your customers a seamless, pain-free holiday shopping experience? Learn from the mistakes of 2024.

A majority of consumers experienced frustrations during their 2024 holiday shopping experience, with **high prices**, **slow shipping**, and **limited stock** among their top pain points.

Meanwhile, a lucky 39% of consumers were more fortunate, saying they had no issues while holiday shopping.



Consumer's biggest frustrations during the 2024 holiday shopping season:



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



RECOMMENDS:

These pain points offer a critical roadmap for refining shopper journeys in 2025. Brands that invest in better pricing strategies, fulfillment speed, and inventory planning can earn trust and loyalty this season by removing friction where it counts the most.

TREND #2

Consumers are more budget-conscious... but not necessarily cutting back spending.



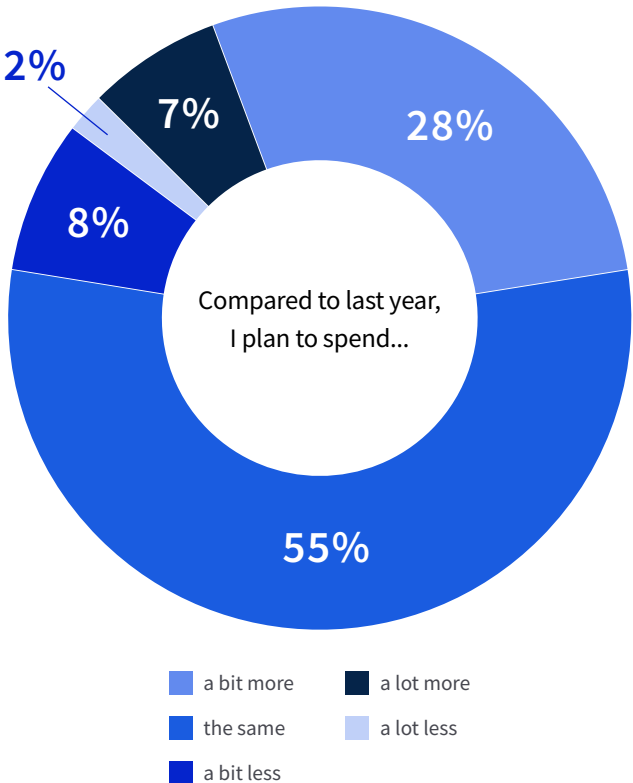
With economic volatility and fears of a recession lingering overhead, consumers are taking a budget-conscious approach into 2025 holiday season. More than two-thirds say it's important to set a budget, and over half plan to stick to one.

At the same time, that careful planning does not appear to be resulting in decreased spending: 90% of holiday gift givers plan to spend the same or more than they did last year, with 35% expecting to spend more and 55% aiming to keep their spending flat. This points to a mindset of cautious control, not cutbacks.

2025 Holiday Shopping Budgeting Attitudes



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



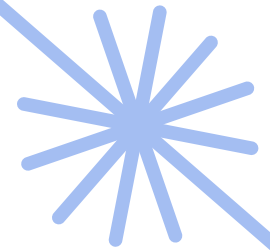
RECOMMENDS:

Digital advertisers should lead with clear value, flexible price points, and urgency-driving tactics like limited-time offers or exclusive bundles to appeal to both budget-conscious consumers and those ready to spend a bit more.



TREND #3

Economic and political uncertainty are looming large and affecting outlooks.



Of course, steady spend levels doesn't necessarily mean people are buying the same number of gifts. Rising prices are pushing many consumers to spend more, while financial and political anxieties are keeping others in saving mode.

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.
- ^ **8%** I got a raise/new job that pays more so I can spend more on gifts.
- ^ **4%** Other

Among those likely to **decrease spend**...

- ✓ **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.
- ✓ **23%** The current state of the market has my income down.
- ✓ **16%** I have fewer people I plan to shop for this year.
- ✓ **14%** There are cheaper items I plan to gift this year compared to last year.
- ✓ **12%** I had a change in employment that is making it difficult to spend on gifts. (e.g., decreased salary, loss of job)
- ✓ **3%** Other

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.



RECOMMENDS:

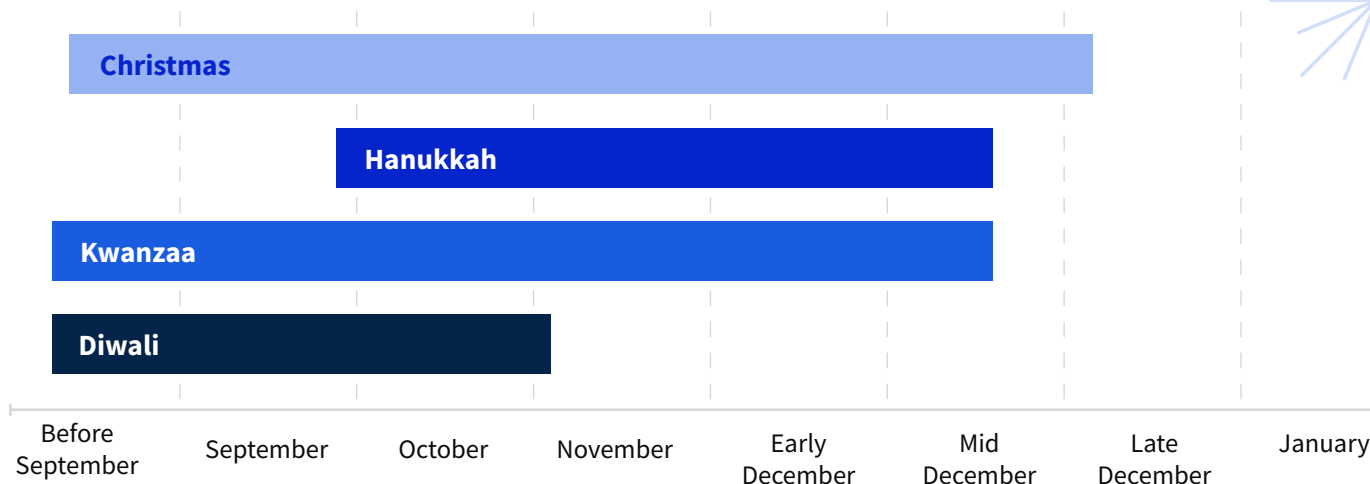
Meet consumers where they are and on their own terms: Messaging should reflect shoppers' mixed financial mindsets while clearly highlighting value, flexibility, and emotional relevance.



Holiday shopping is starting earlier and earlier.

Consumers are kicking off their holiday shopping earlier than ever, with many starting as soon as September to avoid shipping delays, secure items before they sell out, and take advantage of spread-out sales. This shift is creating a longer, more fragmented shopping window that spans several months and peaks at different times for different people.

2025 Planned Holiday Shopping Timeline, by Holiday Celebrated



66%
shop early to
avoid shipping
delays.

63%
want to get all
of their shopping
done as fast as
possible.

57%
shop throughout
the year to take
advantage of sales.

46%
shop earlier now
because they're
concerned items
they want will be
out of stock.

35%
seem to be
shopping earlier
every year.

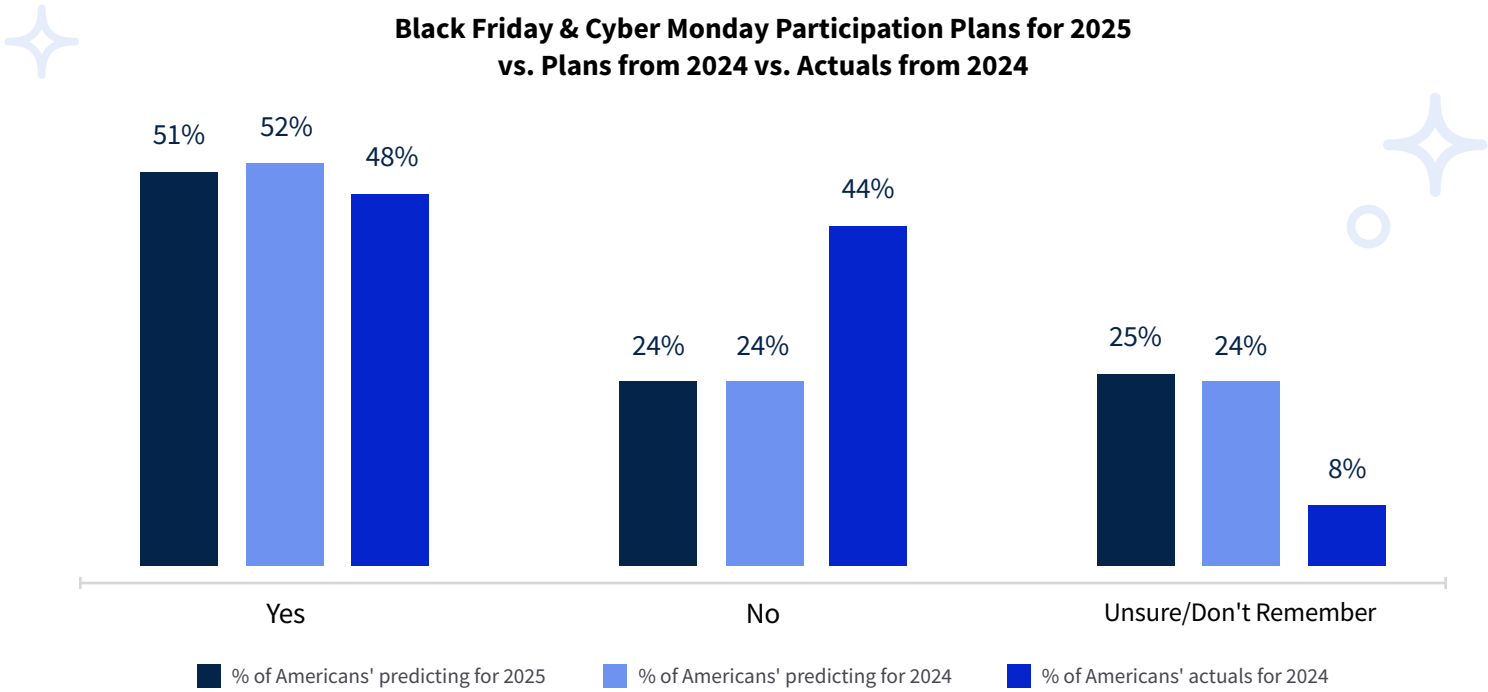
30%
believe the longer
they wait to shop,
the better deals
they will get.

RECOMMENDS:

With budgets tight, marketers will want to ensure they are connecting with consumers early and often. To stay relevant, marketers should think beyond a one-moment push and build messaging plans that evolve throughout the season meeting shoppers with timely offers and reminders wherever they are in their journey.

Black Friday & Cyber Monday are losing their prominence.

While participation in Cyber Week remains steady, fewer shoppers see it as essential. Many say they will already be finished with their shopping by then, or that deals are available throughout the season making these tentpole events feel less special. For brands, it's a cue to not over-rely on Black Friday and Cyber Monday alone.



Among those not planning to shop during 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.

B RECOMMENDS:

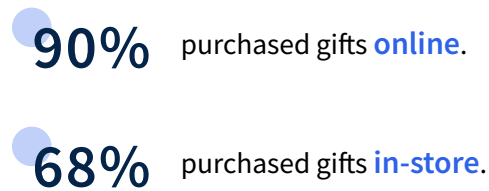
Brands and retailers must consider how to spread out promotions and create excitement earlier to meet consumers where they are in their shopping timeline.

TREND #6

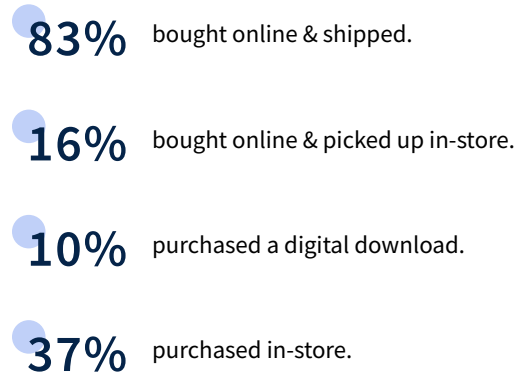
Holiday gift shopping continues to be a hybrid, cross-channel experience.

Shoppers continue to blend online and in-person channels, with most gift buyers saying they will shop across both in the 2025 winter holiday season. Even on Black Friday—a traditionally high-traffic in-store event—online shopping dominated in 2024. While digital channels are clearly central, in-store still plays a meaningful role.

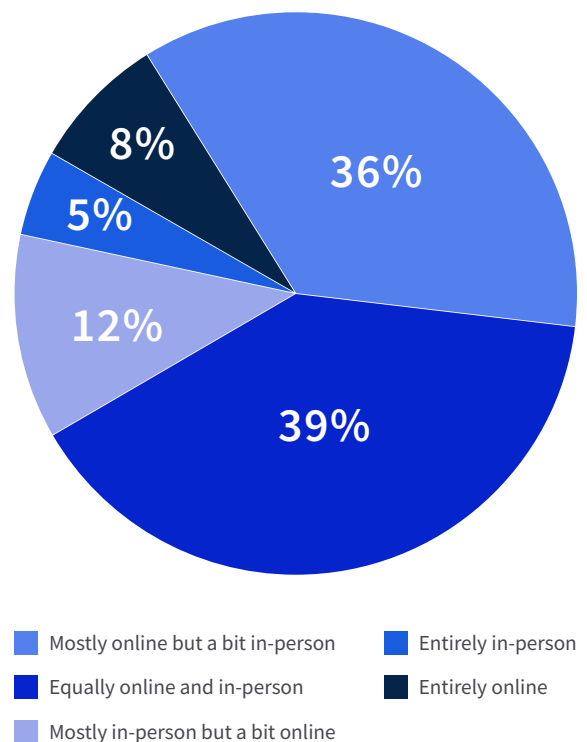
Among gift buyers in 2024...



On Black Friday & Cyber Monday in 2024...



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



RECOMMENDS:

Brands should think beyond a binary choice between online and in-store, and instead focus on creating seamless, connected touchpoints across both.

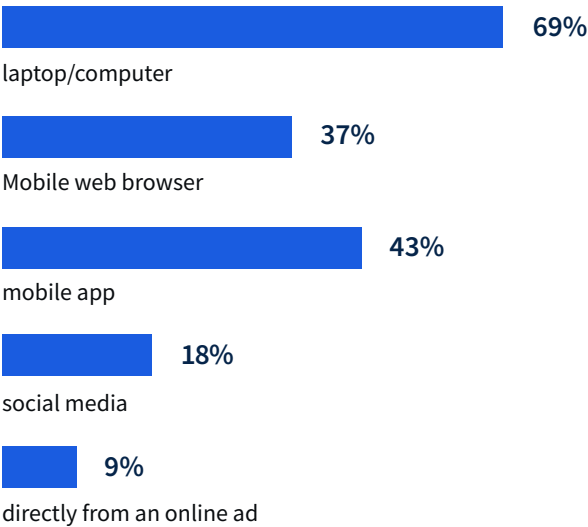
TREND #7

Online shopping is now the norm, and social commerce is poised to be next.

When it comes to the holidays, online shopping is now the norm, with most gift buyers in 2025 planning to purchase via desktop/laptop, apps, or mobile browser.

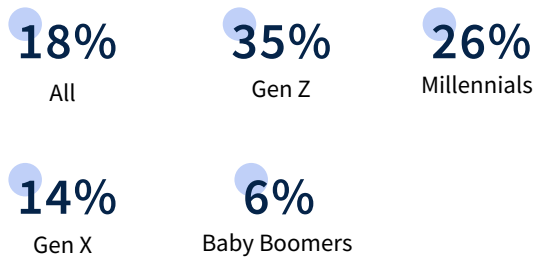
Notably, social commerce is gaining ground, especially among younger generations: **35% of Gen Z** and **26% of millennials** say they will buy gifts directly through social media this year. Instagram and Facebook lead the way as social shopper's go-to platforms, with TikTok close behind.

On Black Friday & Cyber Monday in 2024



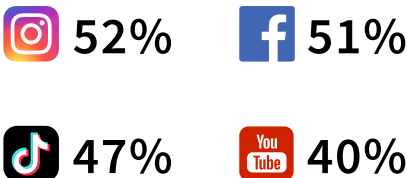
■ % of those planning to shop online for gifts in 2025

Likelihood to Purchase Gifts Directly Through Social Media in 2025 – By Generation



Among Those Likely to Purchase Gifts Through Social Media in 2025

Share purchasing through each channel:



RECOMMENDS:

As these behaviors take hold, social is set to graduate from being an inspiration engine to an established shopping destination. Brands must establish a strong social presence to fuel discovery and sales—particularly among digital natives.

Shoppers are increasingly turning to low-cost platforms.

More than half of gift buyers say they plan to shop with local brands and discount retailers this year. But budget consciousness is driving further shifts, with one in four expect to purchase more gifts from low-cost platforms like Shein and Temu.

When selecting a retailer, shoppers are drawn to unique finds, value, and convenience—factors that span across both traditional and digital-first retailers. Many also appreciate help from retailers through suggestions and festive experiences, both in-person and online.



52%
of shoppers prefer retailers that help them find unique gifts.

48%
like when retailers provide suggestions for gifting or décor.

41%
enjoy participating in experiences that stores and malls offer during the holidays.

36%
are open to participating in virtual shopping events during the holidays.



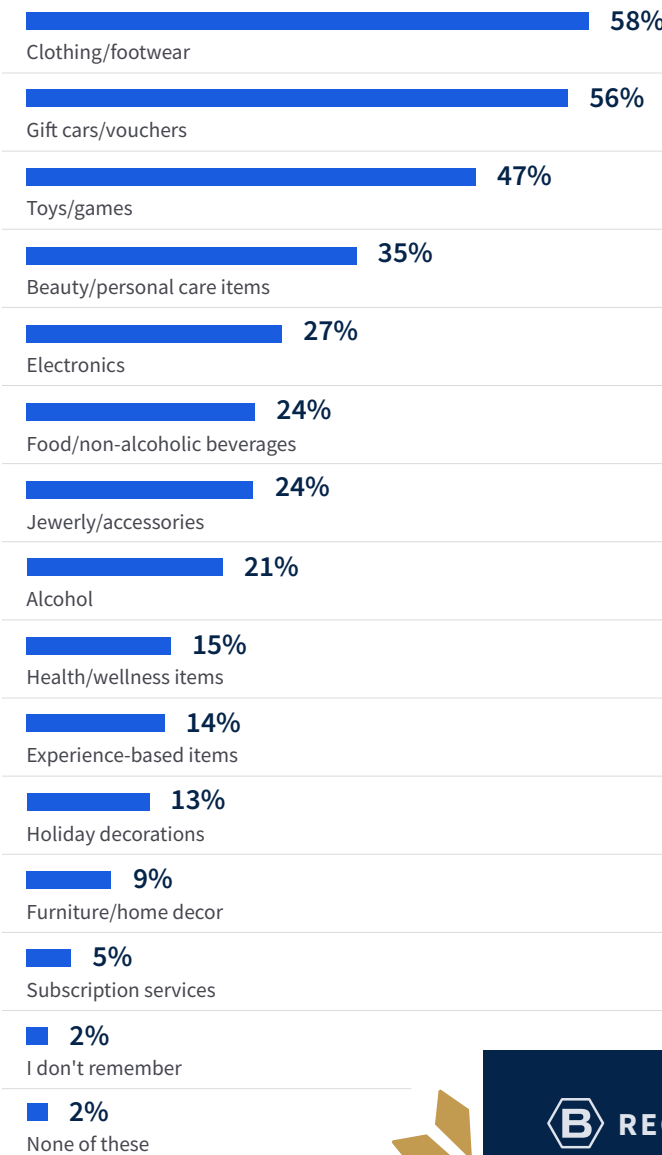
B RECOMMENDS:

With consumers looking for a healthy mix of deals and convenience, retailers must balance affordability with inspiration, discovery, and unique experiences.

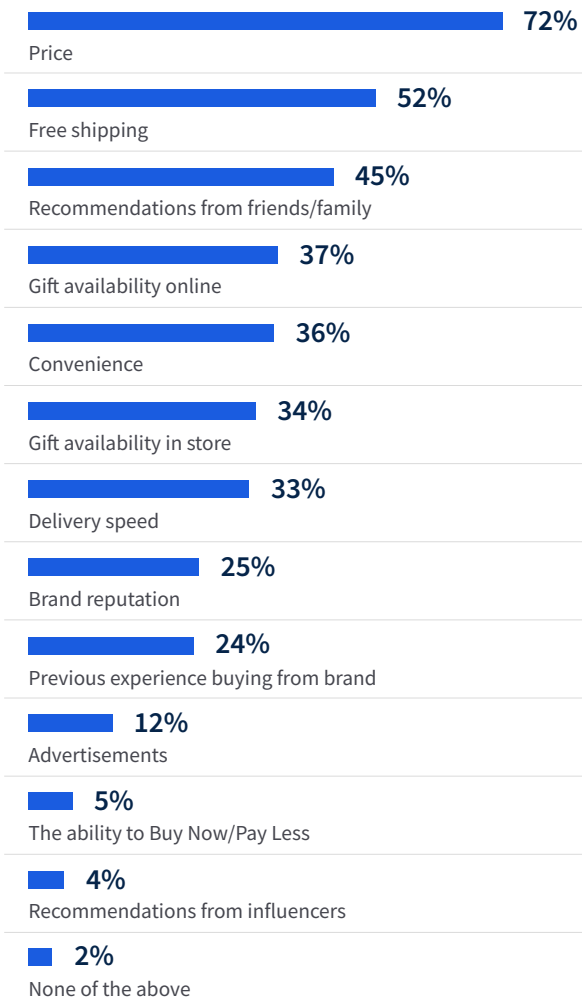
Consumers are seeking out low prices and promotional perks on practical gifts.

Gift giving in 2024 leaned toward practical and universally useful items like clothing, gift cards, and toys. These choices align with shoppers' top priorities: price, free shipping, and recommendations from trusted sources. While emotional or experience-based gifts had lower purchase rates, the data makes it clear that value and convenience are driving decisions.

Types of Retailers Where Holiday Gift Buyers Shop



Holiday Gifts Influencers in 2024



RECOMMENDS:

To win shoppers, brands should lead with affordability and ease, then layer in personalized touches to stand out from the crowd.

TREND #10

Value will win the day among budget-conscious consumers.

Promotions, loyalty programs, and free shipping aren't just nice-to-haves—they're core to how people shop during the holidays.

Half of shoppers say free shipping influences what they buy, and over half will base gift choices on sales and deals. Consumers are actively looking to stretch their budgets, with many prioritizing loyalty perks or choosing low-cost retailers.

Among consumers...

- 51%** say sales & promotions will influence their gift choices.
- 50%** will be influenced to purchase an item from an online retailer that offers free shipping options.
- 49%** want to spend the least amount of money as possible as gifting.
- 45%** prefer to use their loyalty/rewards account when shopping for the holidays.
- 25%** anticipate purchasing more gifts from low-cost online retailers.
- 17%** will join a retailer's loyalty program to receive a discount when shopping for the holidays.

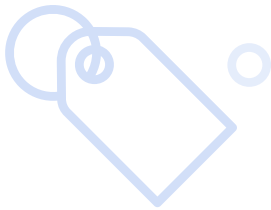


RECOMMENDS:

In order to stay competitive, brands need to lead with value—whether it's pricing, perks, or promotional timing.

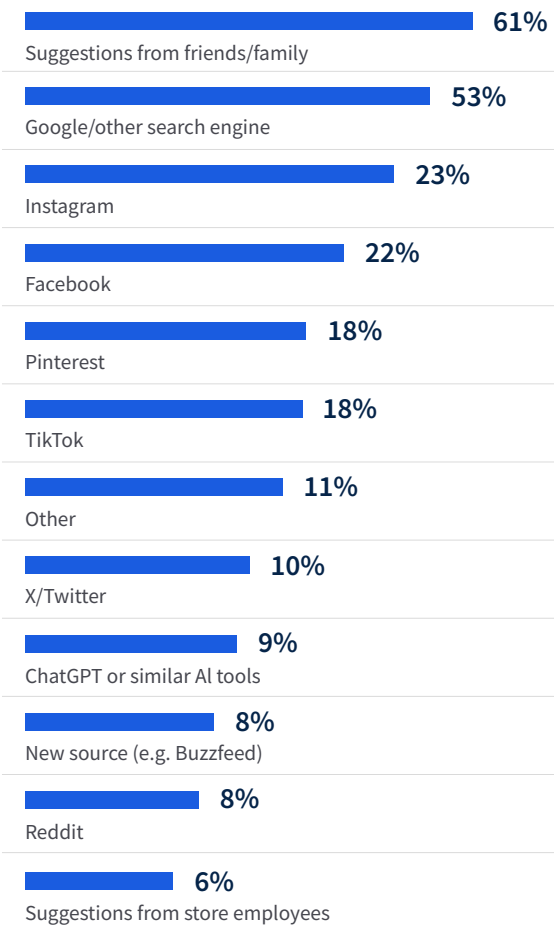


Gift inspiration can come from everywhere, but most purchases come down to value.

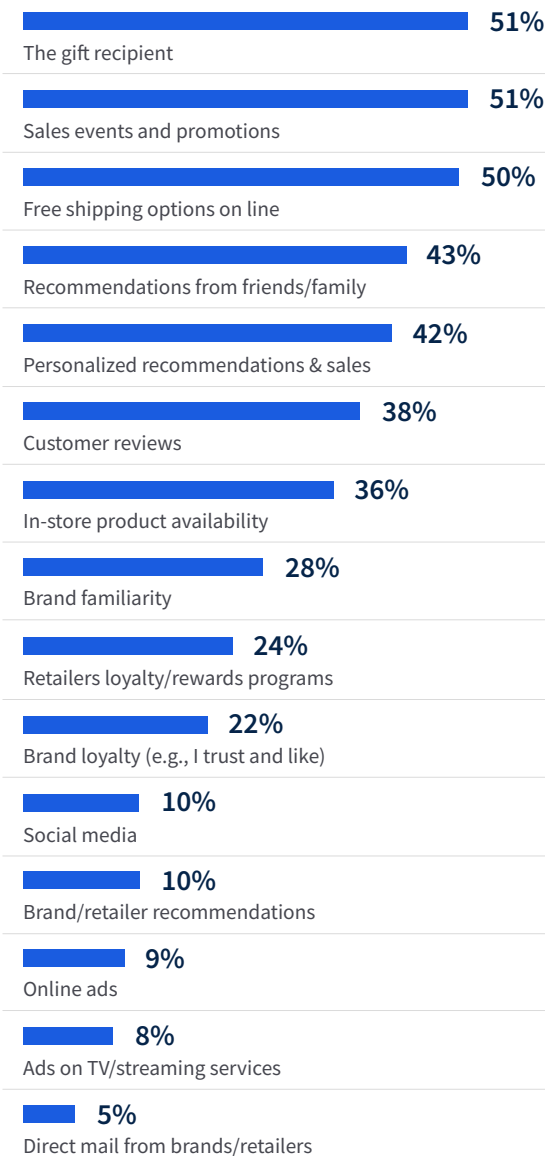


While friends, family, and search engines are still the top spark for gift ideas, shoppers are filtering those ideas through a strong value lens. In 2025, consumers will be seeking out sales, free shipping, and personalized deals will weigh just as heavily as the recipient themselves when deciding on a gift.

Sources for Gift Ideas in 2024, Among Gift Buyers



Anticipated Factors Influencing Gift Ideas in 2025, Among Gift Buyers



To stay in the consideration set, brands need to pair inspiration with practical incentives.

TREND #12

Holiday shoppers are using tech to discover gifts and stay organized.

From planning tools to search rankings, technology plays a quiet but critical role in guiding holiday purchases.

Holiday shoppers are increasingly turning to tech to prepare for the holiday season and find the right gifts for their friends and loved ones. It helps shoppers stay organized, discover new products, compare options and, ultimately, decide where to buy. Whether through search algorithms, social media feeds, or personalized recommendations, tech is embedded at every touchpoint throughout the gifting process.



39%

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



32%

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



28%

say social media is an essential resource for winter holiday shopping.



16%

believe AI will be helpful to find gift ideas.



B RECOMMENDS:

To stay relevant, brands should optimize for visibility across search, social, and recommendation engines, meeting shoppers where tech is already guiding their decisions.

TREND #13

Younger shoppers are letting social media and ads guide them.

Social media and digital ads are becoming increasingly powerful shopping tools, especially for Gen Z and millennials. **Gen Z shoppers** are **125% more likely to say social media influenced** their gift purchases than the average US consumer, while millennials are most likely to be influenced by online and streaming ads.

Altogether, **9% of all shoppers** say they **plan to purchase a gift directly through an online ad** this holiday season, including 14% of millennials. This signals a major shift from inspiration to direct conversion, particularly with younger audiences.



Social Media (as an influence for gifts)

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



Online Ads (as an influence for gifts)

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



TV & Streaming Ads (as an influence for gifts)

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

14%

of millennials plan to buy a gift directly through an online ad this holiday season, the highest of any generational demographic.

Gen Z: Index 45 Millennials: Index 152 Gen X: Index 96 Baby Boomers: Index 84



RECOMMENDS:

Now is the time for digital advertisers to double down on native formats, social commerce placements, and shoppable ad creative to turn influence into action.

Consumers want to see themselves authentically reflected by the brands they support.

At their core, the holidays remain a time of shared connections, celebrations, and experiences with loved ones—all of which make the season deeply emotional.

Increasingly, many consumers want to see their diverse identities and traditions acknowledged in the media and brands they engage with. Half say holiday traditions connect them to their cultural background, and over 50% appreciate when brands adapt their messaging to reflect a range of winter celebrations.

Among consumers...



RECOMMENDS:

This desire for inclusion presents an opportunity for brands to show up authentically—especially in digital environments, where seasonal messaging and brand storytelling are most visible.

TREND #15

Brand values are now a core part of the purchase criteria.

Holiday shoppers aren't just focused on what they are buying—they're also thinking about who they are buying from. Many are actively choosing brands that reflect their beliefs, whether that's by supporting small businesses, backing sustainable practices, or prioritizing ethical treatment of employees.

Nearly half of consumers say they'd walk away from a retailer whose values don't align with their own.

Among consumers...



RECOMMENDS:

Brands that clearly communicate what they stand for—and who can back it up in visible ways—will resonate more deeply with today's conscious consumers.



CONCLUSION

2025 will see emotionally driven gifting shaped by financial caution, continued budget-setting, and thoughtful purchase behavior. Consumers are shopping earlier and may lean into smaller, more meaningful gifts, while balancing tradition with practicality. Online and omnichannel shopping remain dominant, with digital platforms and social media playing an increasing role in discovery. Shoppers are prioritizing value, emotional payoff, and brand authenticity more than ever.

This holiday season, brands should launch emotionally resonant campaigns early, tapping into the spirit of tradition and meaningful connection while helping shoppers feel confident about spending.

With most consumers beginning their shopping well before Thanksgiving and many planning to spend the same or more (while staying mindful of budgeting and value), it is essential to create curated, joy-filled experiences that balance cost with heart.

Brands that lead with warmth, personalization, and a sense of festive purpose in their advertising will be best positioned to win over shoppers who are seeking out thoughtful gifts that matter.



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