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Black Friday & Cyber Monday 2025

Peak Season Success Is Engineered, Not Discounted

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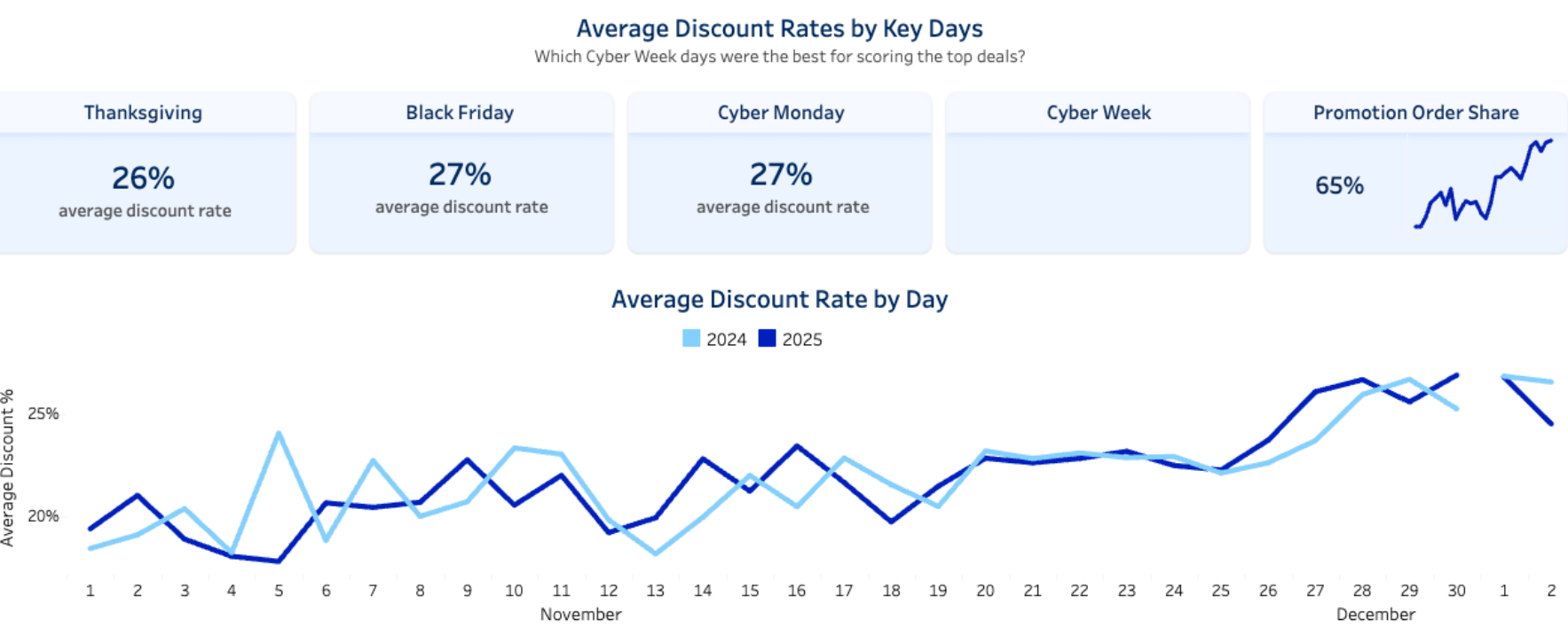
WE *Create* WHAT'S NEXT

A Test of Commercial Systems

Black Friday and Cyber Monday (BFCM) 2025 reinforced a simple truth: peak season is no longer a promotional burst; it is a test of commercial systems. Global online Black Friday sales reached \$79 billion (+6%), [with Cyber Monday adding \\$17.3 billion](#)—the biggest online shopping day of the year. In the U.S., Black Friday online spend hit [\\$11.8 billion \(+9.1%\)](#).

But behind the record numbers, shopper behavior grew more disciplined. Consumers compared relentlessly, used mobile as their primary interface, leveraged AI tools for validation, and waited for trusted signals before converting.

Omnicom’s Flywheel data showed that auction pressure intensified. CPCs climbed, and CVRs fell—clear evidence that demand was high, but conversion was hard-won. The brands that outperformed were the ones with aligned systems: connected media, stable inventory, consistent pricing, strong availability, and dependable fulfillment.



Peak Performance Was Engineered, Not Discounted

The 2025 peak season demonstrated that operational readiness, rather than promotional aggression, is now the primary driver of commercial success.

Brands that stabilized availability, ensured pricing accuracy, prepared product detail pages, aligned retail media, and strengthened fulfillment [outperformed](#) those relying heavily on markdowns.

This was especially evident in the United States, where the [“more shoppers, fewer dollars”](#) paradox in physical retail: offline footfall increased, but spend per shopper declined, while [online purchasing surged](#).

Success wasn’t improvised during the event—it was engineered long before it began. The brands that succeeded were those whose commerce systems were already aligned with availability, content, pricing, fulfillment, and media [working as one](#).

Consumers Became Value Engineers

One of the clearest behavioral shifts was the rise of disciplined, value-driven shopping. Adobe and Criteo both observed increased early-week browsing and cart activity ahead of Black Friday. Rather than impulsively adding items, [consumers strategically ‘parked’](#) products in baskets to monitor price movements, compare retailers, and wait for trusted value signals.

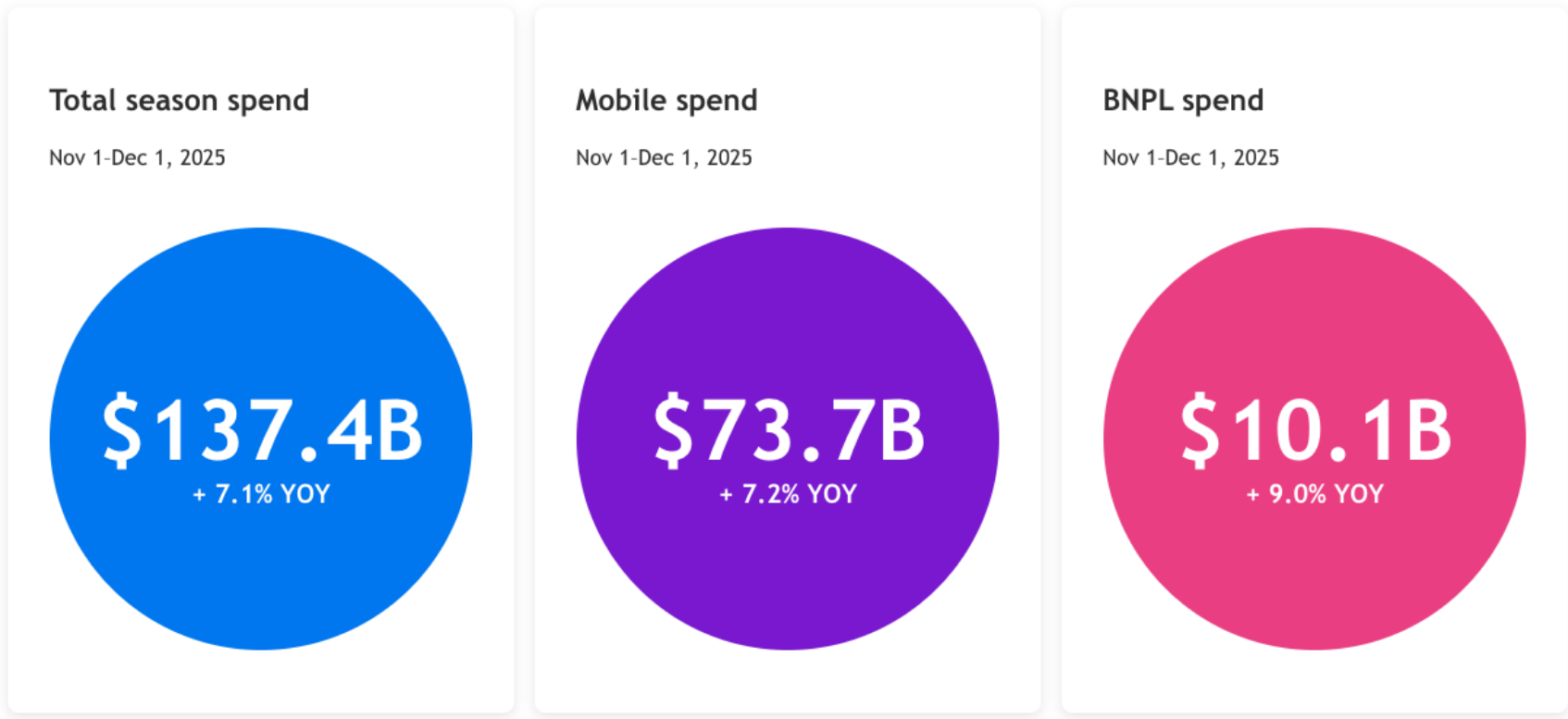
This behavior reflects a broader trust gap. DHL’s global Black Friday trends analysis found that [only around half of consumers fully trust Black Friday deals](#), prompting heightened skepticism and a rise in validation behaviors. Consumers became their own analysts, checking price histories, assessing retailer reliability, and purchasing only when the balance of value and trust was right.

Adobe reports that AI-driven traffic to U.S. retail sites [surged 805% vs. 2024](#), as shoppers adopted tools like [Walmart’s Sparky](#), [Amazon’s Rufus](#), and third-party AI assistants to [navigate deals](#).

Shoppers acted less like bargain hunters, validating every signal and purchasing only when value and trust aligned. [Consumers were not chasing the biggest discount; they were waiting for the most reliable one](#).

Mobile Was the Dominant Shopping OS

Peak season did not happen on websites; it happened on phones. Mobile accounted for most retail traffic during BFCM 2025, with Adobe reporting that [mobile represented over 56% of online revenue](#) across the wider holiday season.



Consumers used mobile apps for personalized deal alerts, price tracking, and frictionless checkout via digital wallets. Shopping behavior became fragmented across micro-moments: browsing during commutes, comparing during breaks, and completing purchases within seconds when trust and value aligned. Mobile was no longer a channel; it was the operating system of BFCM 2025.

Social Commerce Set the Agenda

Social platforms played an outsized role in shaping what consumers wanted, even if they didn't dominate where purchases happened. Shoppers [exposed to creator-led content](#) converted more strongly downstream, underscoring the growing power of human-filtered recommendations. TikTok, Instagram, and YouTube heavily influenced consideration across beauty, home, electronics, and gifting.



But when it came to checkout, consumers gravitated to marketplaces and retailer sites, [where fulfillment reliability, faster shipping, and trusted returns policies remained decisive](#). In Latin America, [livestream commerce amplified](#) social influence, yet most transactions still flowed through platforms with strong logistics ecosystems.

Social channels created desire, while marketplaces captured the transaction.

Trust was the defining psychological driver of BFCM 2025. With [only half of shoppers fully trusting promotional pricing](#), consumers evaluated deals more critically than ever. Price integrity, stable discounts, clear delivery timelines, and transparent returns policies became pivotal in determining whether browsing translated into buying.

Brand credibility outweighed discount depth. Retailers that inflated prices before applying "reductions," or those unable to provide reliable delivery information, saw weaker performance despite aggressive markdowns.

Across markets, shoppers rewarded predictability and transparency. In the U.S., [e-commerce grew 10.4% on Black Friday versus just 1.7% in-store](#), not because online prices were lower, but because [fulfillment confidence was higher](#). Ultimately—trust, not the size of the discount—determined who won the sale.

Amazon's Innovation Playbook

2025 proved that retail media only works when the shelf is ready, but this year, Amazon raised the bar. The platform introduced a [wave of innovations](#) designed to personalize, accelerate, and gamify the shopping experience:

- Personalized deals pages tailored to individual behavior.
- Direct engagement via WhatsApp, which drives urgency with "Shop deals now."
- Navigation upgrades, adding "Same Day & Overnight" delivery options.
- Scarcity signals, such as new badges like "Deal with high demand".
- Gamification, with the "Spin the Wheel" widget in EMEA.
- Timed drops and favourites, building anticipation for doorbuster deals.
- Enhanced desktop UX, embedding deal prices and "Add to Cart" functionality.
- Brand-specific deal links, e.g., "Shop [brand] Deals", were tested during Cyber Week.

These changes didn't just improve shopper experience; they amplified the pressure on brands to be shelf-ready. Rising CPCs punished weak fundamentals, while urgency-driven features shifted conversions later in the attribution window. As 2026 approaches, success will hinge on mastering this interplay: optimizing the shelf while leveraging platform-led innovation to convert demand into revenue.



AI also expanded its influence across [brand operations](#) in 2025. Tools that streamline campaign setup, unify full-funnel activation, and reduce manual effort showed how [AI will increasingly accelerate](#) execution.

Black Friday and Cyber Monday 2025 revealed a global commerce environment defined by maturity, discipline, and operational precision. Consumers behaved intelligently and cautiously, rewarding brands offering clarity, relevance, and reliability.



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