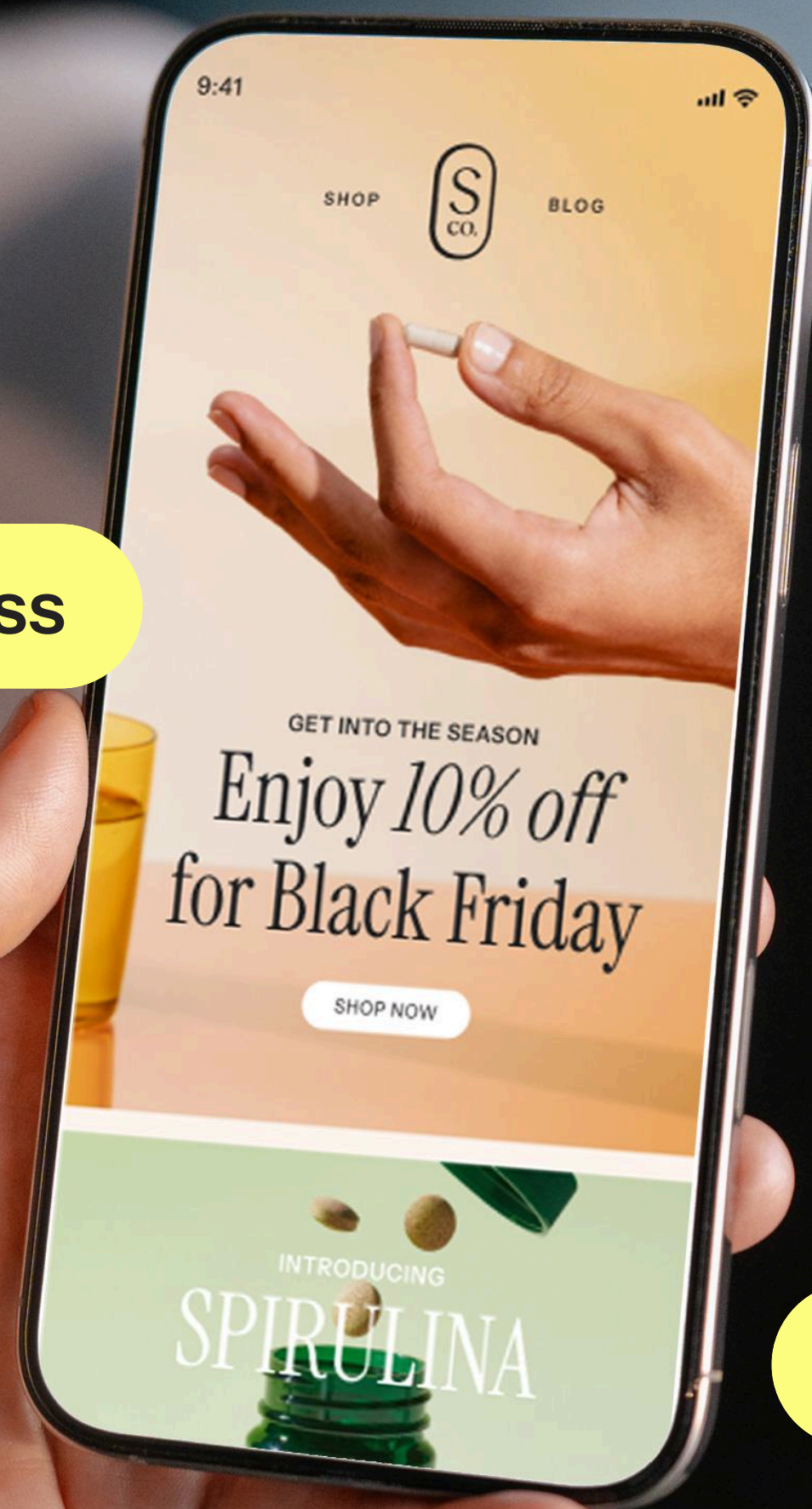


Review discount

Early access



Flash sale

2025

BFCM FORECAST

What marketers need to do to win BFCM 2025,
according to insights from 7,000 global consumers.

klaviyo[®]

The only CRM built for B2C

Navigating a new era of consumer connection

The state of retail is always evolving—and in 2025, things are changing faster than ever.

2025 has been a challenging year for retailers. The World Trade Organization's April 2025 [global trade outlook and statistics report](#) predicted that the total volume of global trade would decline by 0.2% this year. This new estimate is lower than the original forecast for 2025, representing a [shift of \\$840 billion](#) in sales. Not only have [new tariffs](#) created unpredictable costs amid rising inventory and demand risk, but Klaviyo's 2025 [state of B2C marketing report](#) found that customer acquisition costs continue to increase.

Buyer behavior has changed, too. According to new research from Klaviyo, 81% of consumers say inflation is affecting their spending decisions right now or that it will in the future. 35% of buyers have switched to more affordable or value-focused brands, 30% shop less frequently with their trusted brands, and 24% wait for sales or discounts before shopping at all. And 30% of shoppers plan to use AI this holiday season to find discounts and deals.

And Black Friday Cyber Monday (BFCM) is as important to brands as it's ever been: 2 in 5 consumers plan their holiday shopping around these sales. For retailers, these trends present an opportunity. The teams that adapt their strategies to reflect how shopping behavior is changing will be able to capture a larger share of wallet than those operating as if it's all business as usual.

We're here to help. This report, powered by two global surveys of over 7,000 consumers—a BFCM survey and an omnichannel shopping survey—analyzes the trends that will define BFCM 2025 and the strategies retailers can use to stand out.

We explore how personalization, loyalty initiatives, top-notch customer service, and omnichannel customer experiences can drive success and help brands do more with less in a challenging economic climate.

—Jake Cohen, VP of insights and strategy, Klaviyo



Though today’s shoppers are more focused on value, there’s plenty of opportunity if you know where to look for it.



Younger generations start holiday shopping months in advance

While 40% of consumers shop specifically during BFCM sales, 24% start earlier—with Gen Z leading engagement 30% shopping early sales. Year-round campaigns are critical for capturing the greatest share of shoppers who buy outside of the BFCM window.¹



The holidays don’t end in December

9% of consumers make their first holiday purchase in January, and it’s the fourth most popular month for the first holiday purchase. Think: New Year’s Day sales and Boxing Day promotions.¹



AI-assisted shopping is on the rise

54% of consumers anticipate using AI tools during BFCM 2025 for shopping assistance like comparing prices and deals, searching for products, summarizing customer feedback, recommending personalized gift ideas, or tracking price drops. 62% would prefer to shop with AI that remembers their purchase history over explaining their preferences to sales associates.¹



Loyalty still matters in uncertain times

81% of consumers say inflation has affected their spending decisions, but 65% haven’t changed brands. Instead, they’ve consolidated spend with trusted retailers.¹



Email dominates, but mobile-first channels are on the rise

Depending on the message content, 58–64% of respondents said email was their preferred channel for brand communications (product announcements, sale notifications, order and shipping confirmations, and customer support). But, channel preferences continue to diversify, spread across text messaging, mobile push notifications, social media, WhatsApp, live website chat, and even phone calls.¹



Omnichannel is non-negotiable

77% of omnichannel consumers use 3–4 channels when shopping for non-essential products, and more than 1 in 5 (23%) use 5 or more. Physical stores remain a major part of the shopping experience (29–52% of buyers prefer brick-and-mortar locations, depending on the category), but digital channels are convenient and help with brand discovery.²



The economic reality is reshaping gifting

Shoppers aren’t slowing down, but they will be smart about their gifting purchases this year. 77% plan to spend the same or more on holiday shopping than they did last year, but 65% will save in advance to buy gifts during the holiday season.¹

Long live the holiday season(s).

Instead of the frantic 4-day rush between Black Friday and Cyber Monday, consumers will increase “always-on” discovery and purchasing, making their first purchases in May, June, or July and continuing through the end of the year. Early access to sales and sustained, personalized engagement will be key to winning buyers.

Review discount

Early access



In 2025, holiday shopping starts in the summer

Holiday shopping used to be driven by the FOMO of BFCM weekend: flashy deals, countdown clocks, and the biggest discounts of the year. But today’s shoppers are spreading out their spending, planning ahead as early as June: while 40% of consumers plan to shop during BFCM, 24% plan to shop earlier sales, and 36% don’t time their shopping around any particular sale. For retailers, this means BFCM is no longer the center of their year. The best brands will build a steady drumbeat of year-round, always-on campaigns.

36%

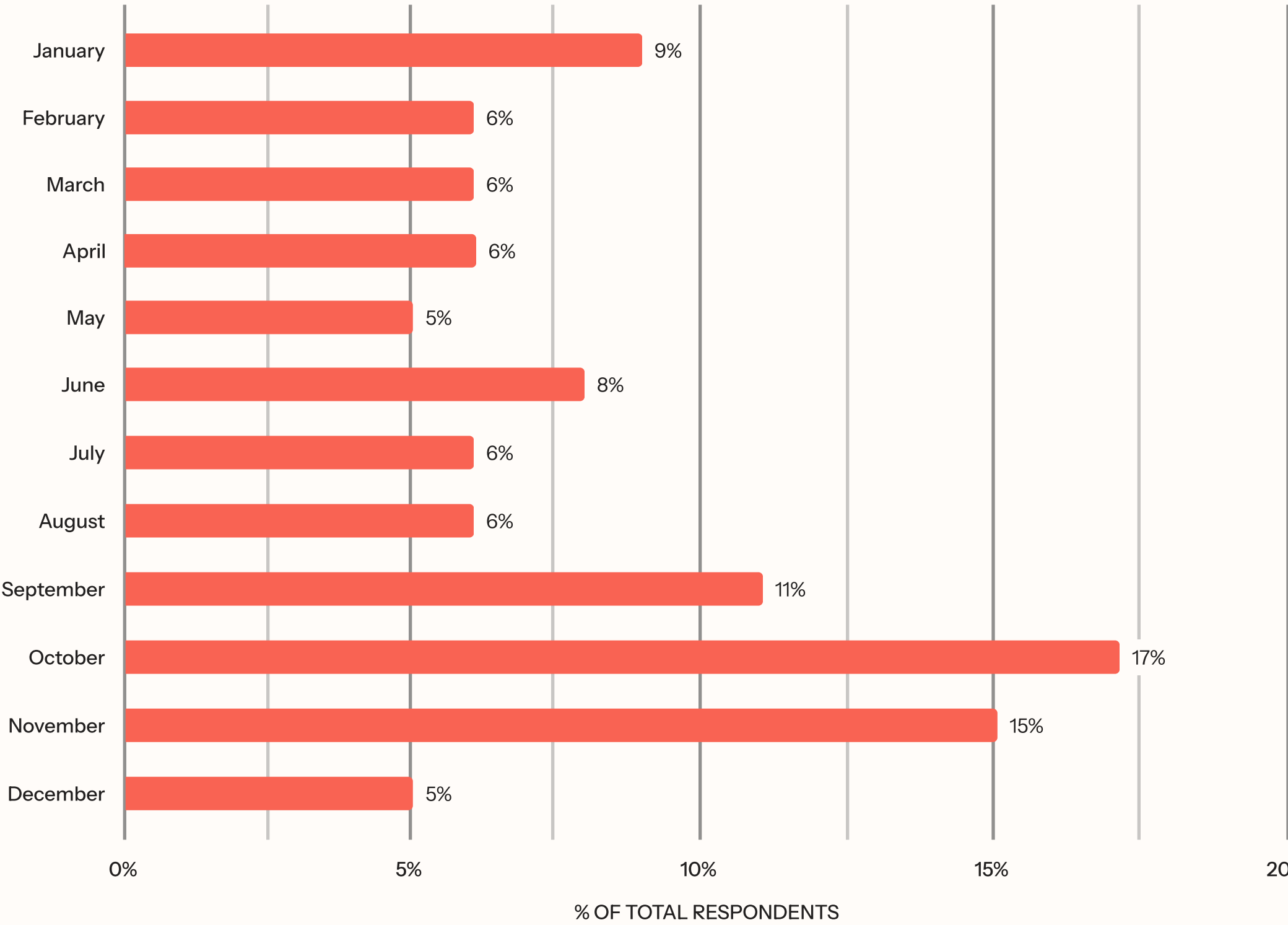
growth in order volume
2 months after installing
the Toast integration

22%

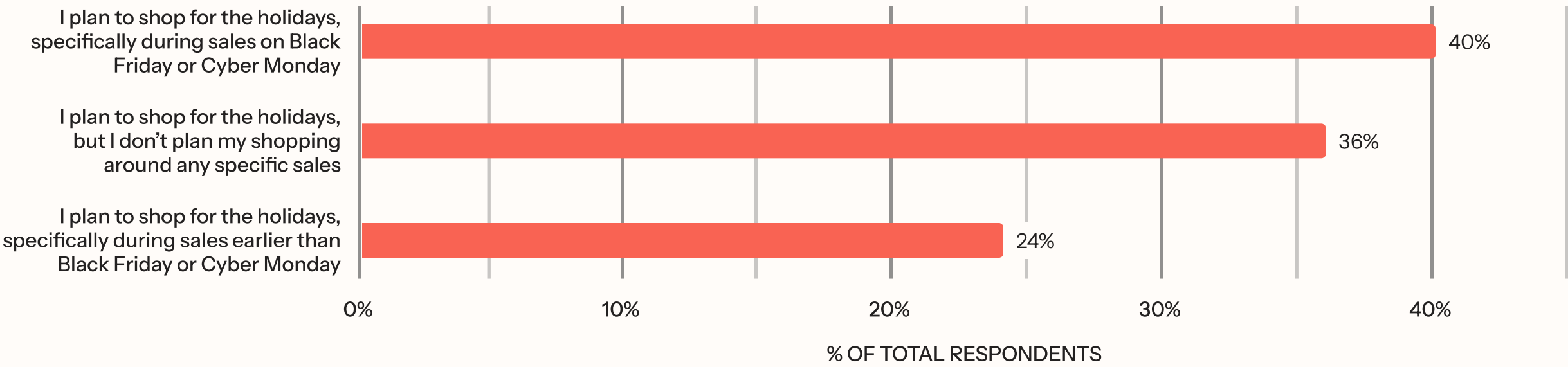
growth in order volume
6 months after installing the
Square integration

More consumers make their first holiday purchase in October than in any other month (17%), but even more (20%) start holiday shopping during the summer (June–August). North American consumers are the earliest holiday shoppers, with 24% making their first purchase in October and 21% in November—both higher than the global average.

When do you typically make your last holiday purchase? (select one)



Which statement best describes your shopping plans for fun, non-essential products or services for the 2025 holiday season?

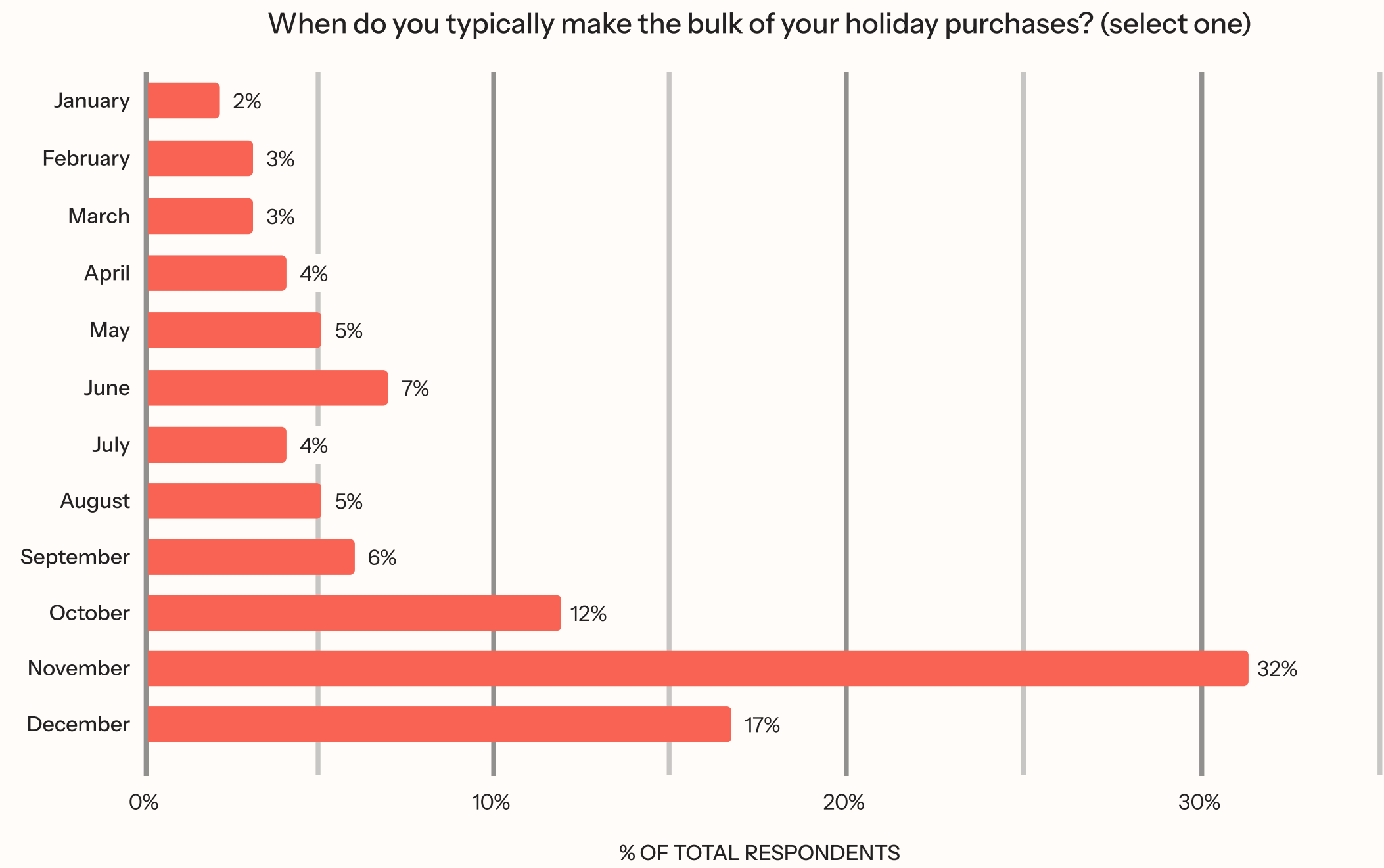
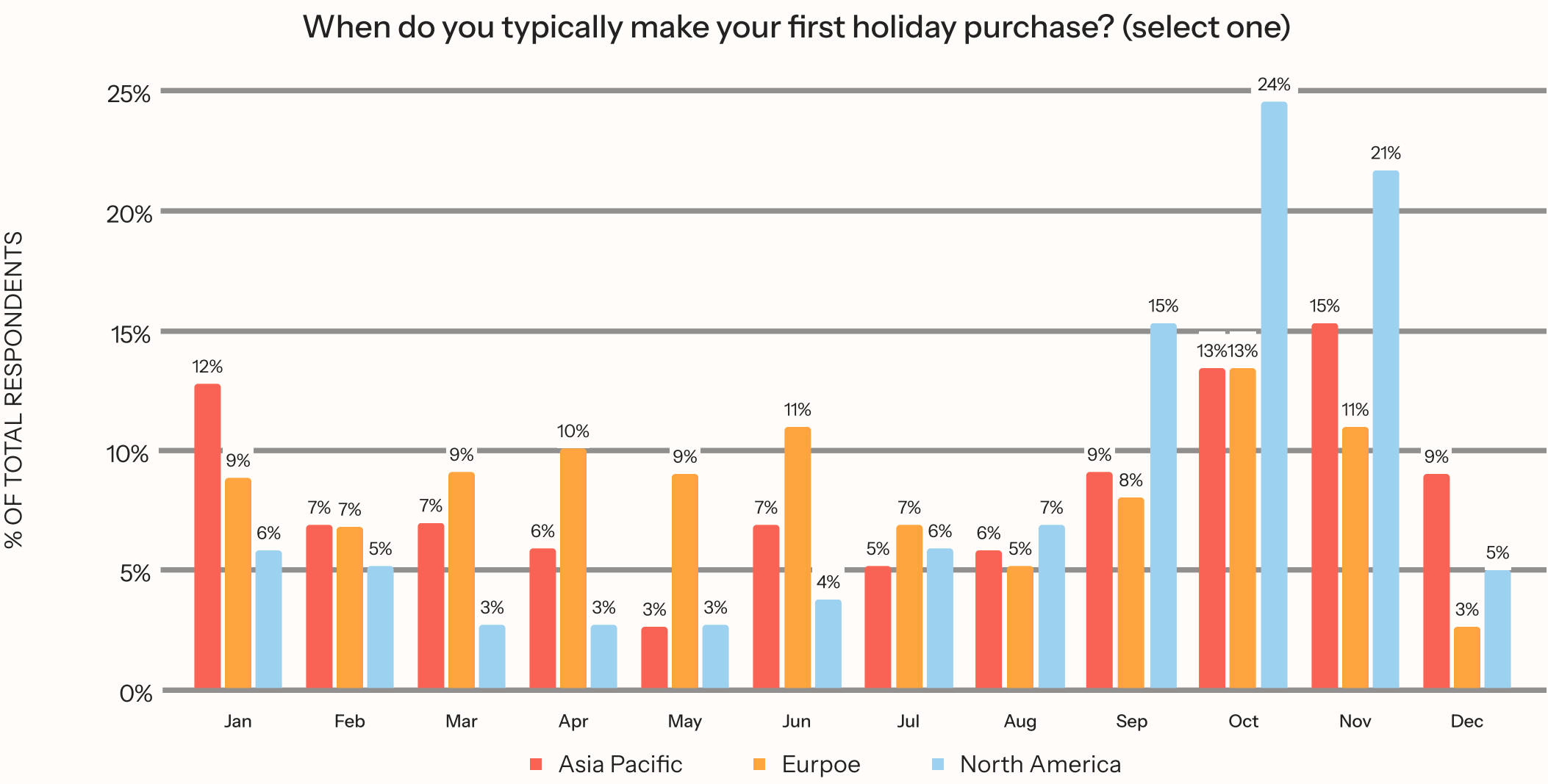


Regionally, the holiday season starts and ends at different times

More consumers make their first holiday purchase in October than in any other month (17%), but even more (20%) start holiday shopping in June–August.

North American consumers tend to start shopping in the months leading up to BFCM, with 15% making their first purchase in September, 24% in October and 21% in November—all higher than the global average.

The start of the New Year is another important season, especially in Asia Pacific and Europe, where Boxing Day sales and New Year’s gatherings can push the gifting season back after Christmas.



The holiday season isn't over after BFCM...

Just because holiday shopping starts earlier doesn't mean it ends earlier. Over half of shoppers (51%) don't make their last holiday purchase until December, with some waiting even longer—8% don't wrap up their holiday shopping until January–March. Consumers are shopping year-round, and to win the biggest share of wallet, you need to be showing up year round for them with “always-on” campaigns.

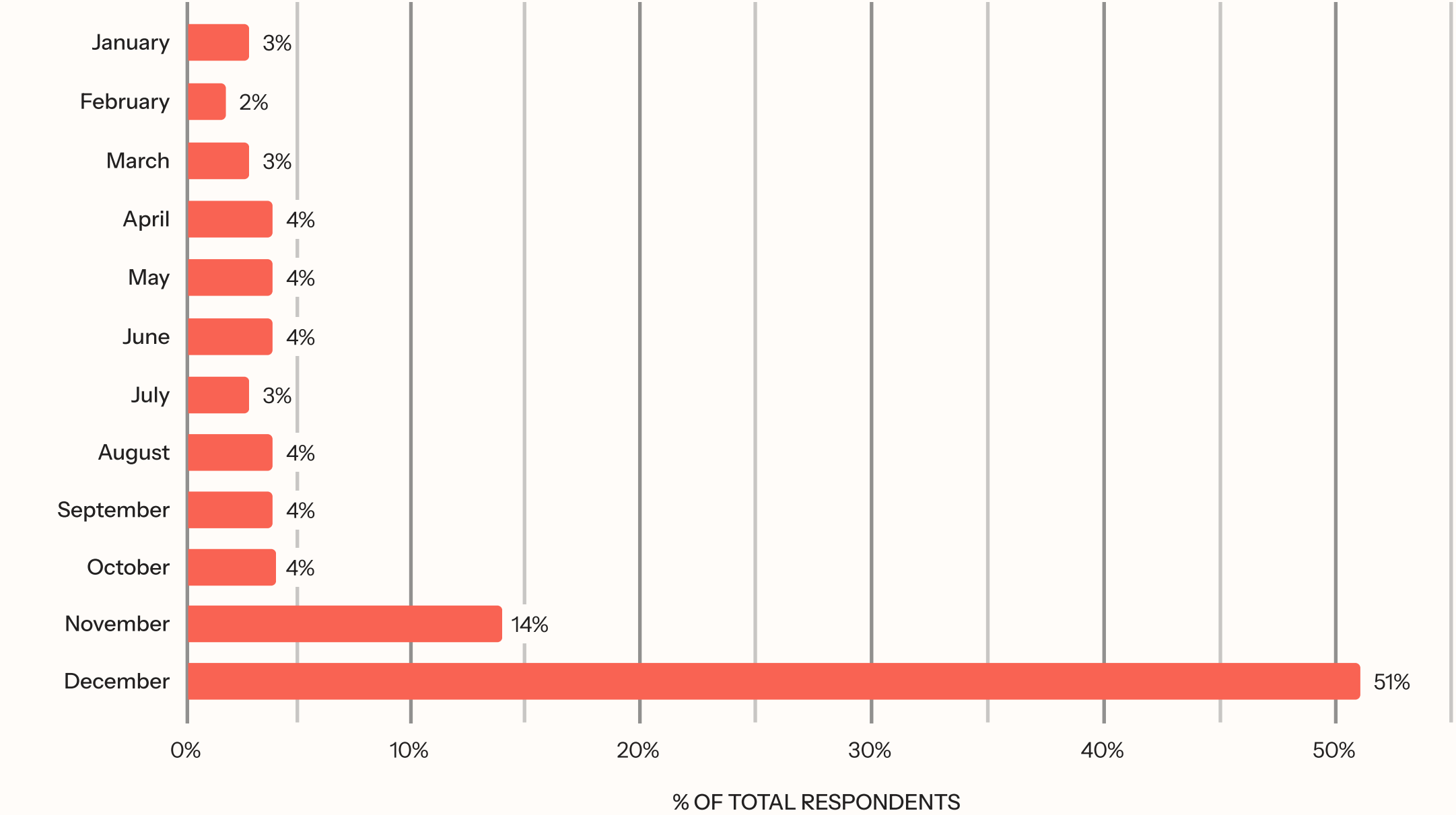
...but BFCM remains a massively popular time to shop

When it comes to holiday sales, BFCM still reigns supreme. 3 of the top 5 holiday discounts that draw in shoppers happen in November and December—Christmas, Black Friday, and Cyber Monday.

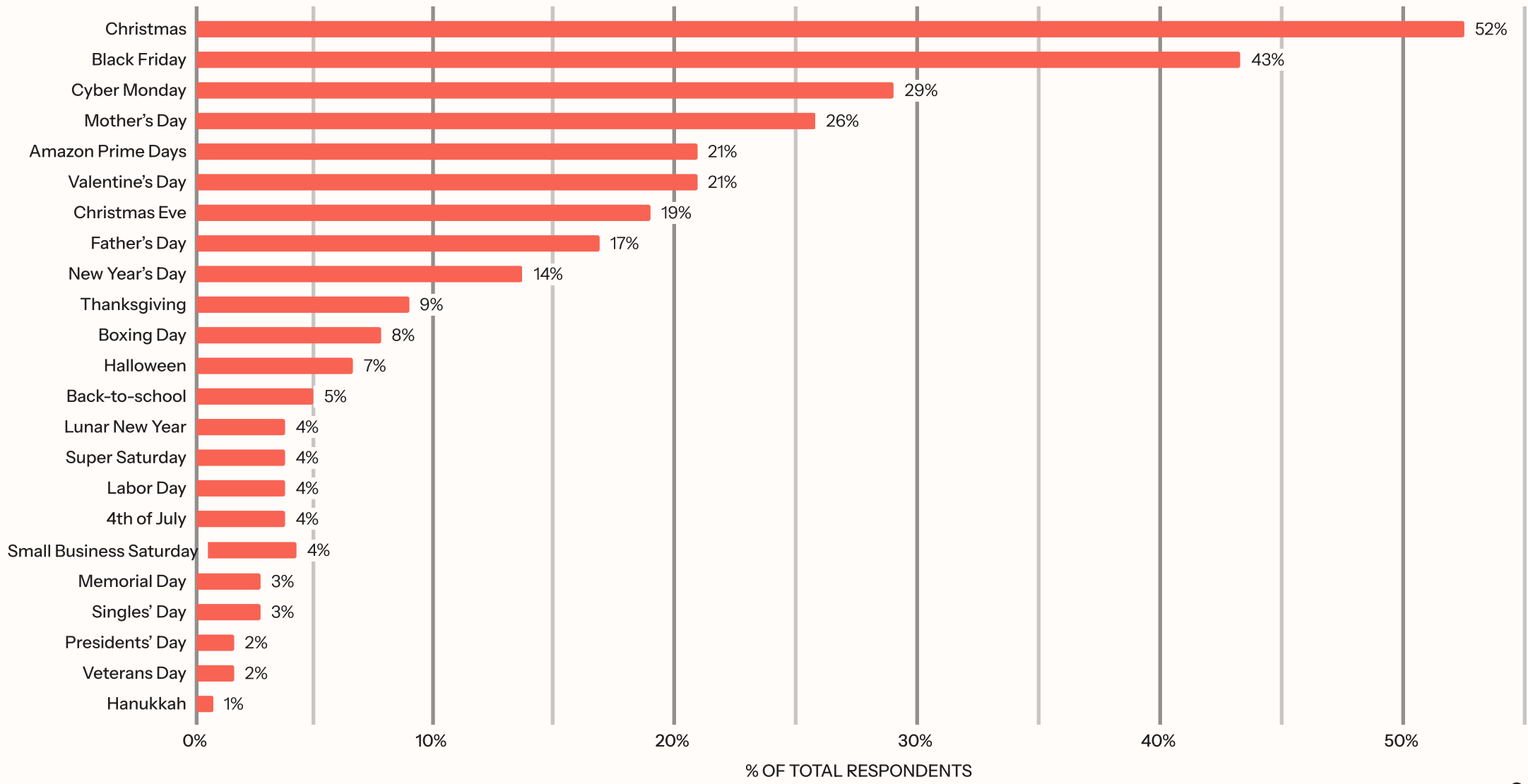
Regionally, Cyber Monday is most popular in North America. One-third of North American consumers (33%) shop for gifts on that day, compared to only 21% of European consumers and 24% of those in Asia Pacific.

In Europe and Asia Pacific, Mother's Day is more important than Cyber Monday, with 30% and 29% shopping these days, respectively. Valentine's Day is a big holiday in Europe and North America, with over 1 in 5 shoppers making purchases during these sales.

When do you typically make your last holiday purchase? (select one)



Which of the following holidays or seasons are you most likely to buy gifts for yourself or others due to the availability of deals or discounts? (select up to 5)

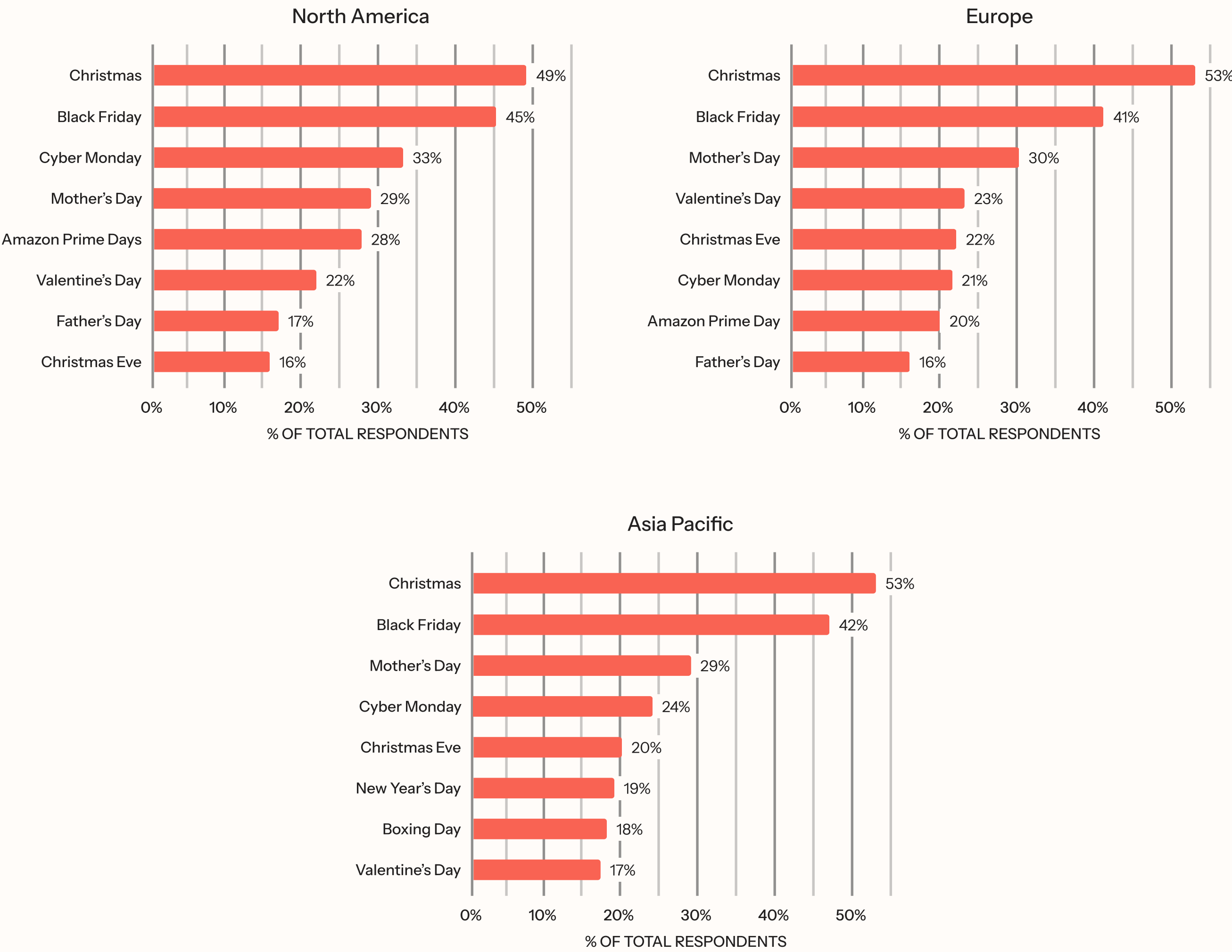


LONG LIVE THE HOLIDAY SEASON(S)

Regionally, Cyber Monday is most popular in North America. One-third of North American consumers (33%) shop for gifts on that day, compared to only 21% of European consumers and 24% of those in Asia Pacific.

In Europe and Asia Pacific, Mother’s Day is more important than Cyber Monday, with 30% and 29% shopping these days, respectively. Valentine’s Day is a big holiday in Europe and North America, with over 1 in 5 shoppers making purchases during these sales.

Which of the following holidays or seasons are you most likely to buy gifts for yourself or others due to the availability of deals or discounts? (by region)



What marketers can do



Prioritize early list growth and engagement.

The best time to collect zero- and first-party customer data was yesterday. The second-best time is now. Ask customers for data well ahead of BFCM via engaging sign-up forms, quizzes, and surveys, so you can deliver hyper-personalized experiences that cut through the noise.

- Ask for customers' phone numbers on sign-up forms, and learn where your customers are most likely to engage using Klaviyo Analytics. That way, come peak BFCM, you can communicate with shoppers the way they want.



Shift from a transactional mindset to a relationship-first approach.

With more consumers planning to space out their holiday spending, there's no need for retailers to bet the house on one-off deals. Instead, focus on building long-term loyalty that keeps customers coming back.

- Nurture new subscribers with personalized content and offers using automated flows.



Embrace year-round personalized promotions.

Leverage customer data to offer relevant discounts and early access based on individual browsing, purchase, and even customer service history. Real-time data activation is the foundation of better targeting and personalization in every interaction.

- Personalize shopping experiences to nurture relationships all year so customers want to return during peak seasons.

☆ AI Spotlight

Identifying specific groups of customers and sharing hyper-relevant offers helps brands personalize at scale.

Segments AI

Build segments, fast, with plain-language prompts.

Personalized campaigns

Deliver the best variant of a message to each individual customer.

Smart Send Time

Send the right message to the right customer at the right time.

Culture Kings uses Klaviyo AI to segment smarter and personalize more

Australian streetwear brand [Culture Kings](#) has used Klaviyo AI to shift from batch-and-blast messaging to [a more sophisticated, targeted approach](#). They use [Segments AI](#) to create targeted shopper groups, and leverage [dynamic product feeds](#) to add relevant recommendations to emails.

“We have diverse audiences across 3 regions, each requiring a unique approach. That’s where Klaviyo, supercharged by its powerful AI features, comes in,” says Jarrod Hinvest, head of ecommerce at Culture Kings.

Dynamic product feeds



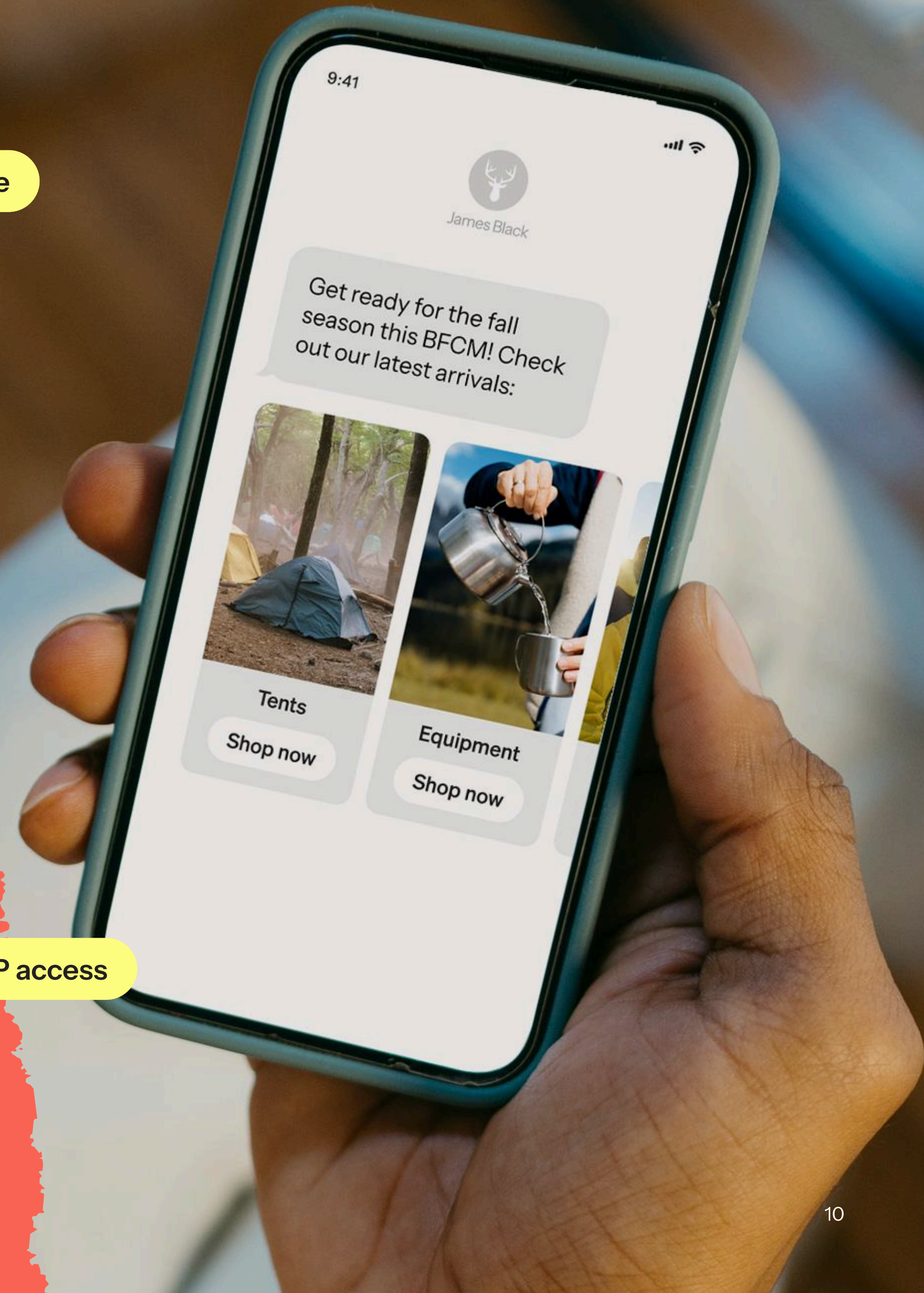
Segments AI

Discount-driven, loyalty-led: the new economics of retention.

In challenging economic times, consumers tend to become more price-sensitive. They won't stop shopping entirely, but they might consolidate spend with their most trusted retailers.

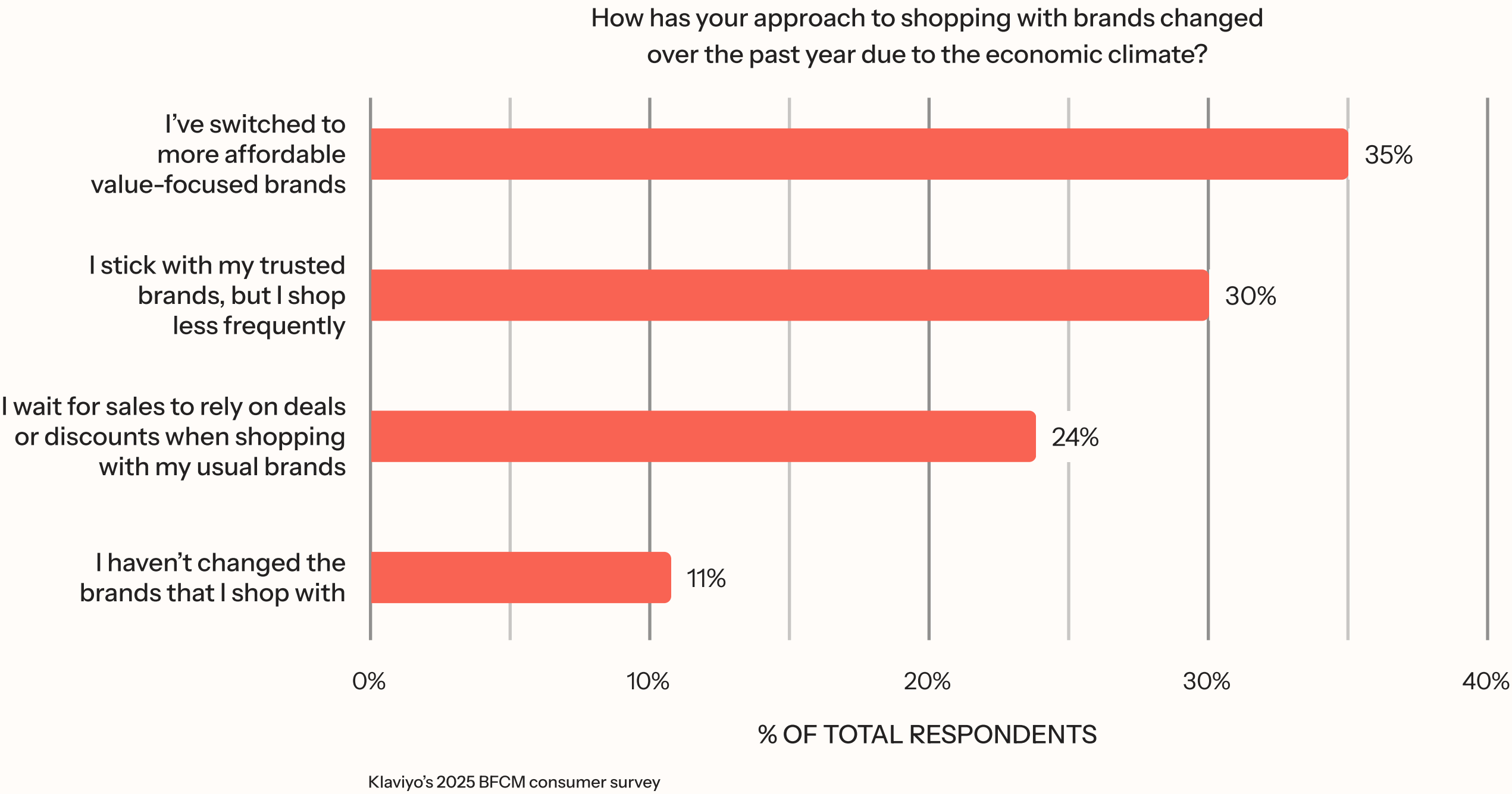
Discount available

VIP access



Consumers have changed their shopping habits

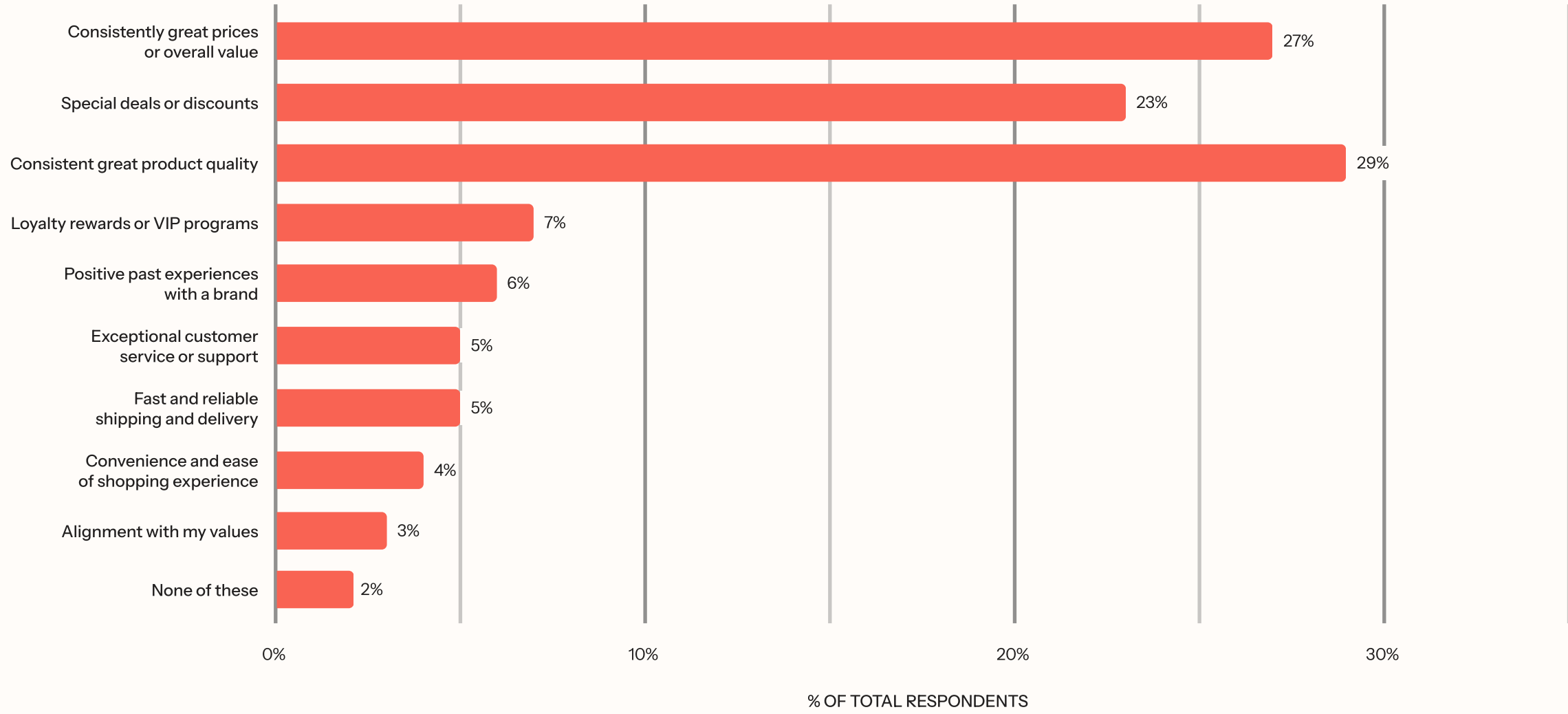
In the past year, only 11% of consumers haven't changed the brands they shop with at all. The rest have switched to more affordable brands, shop less frequently, or wait for sales to make purchases.



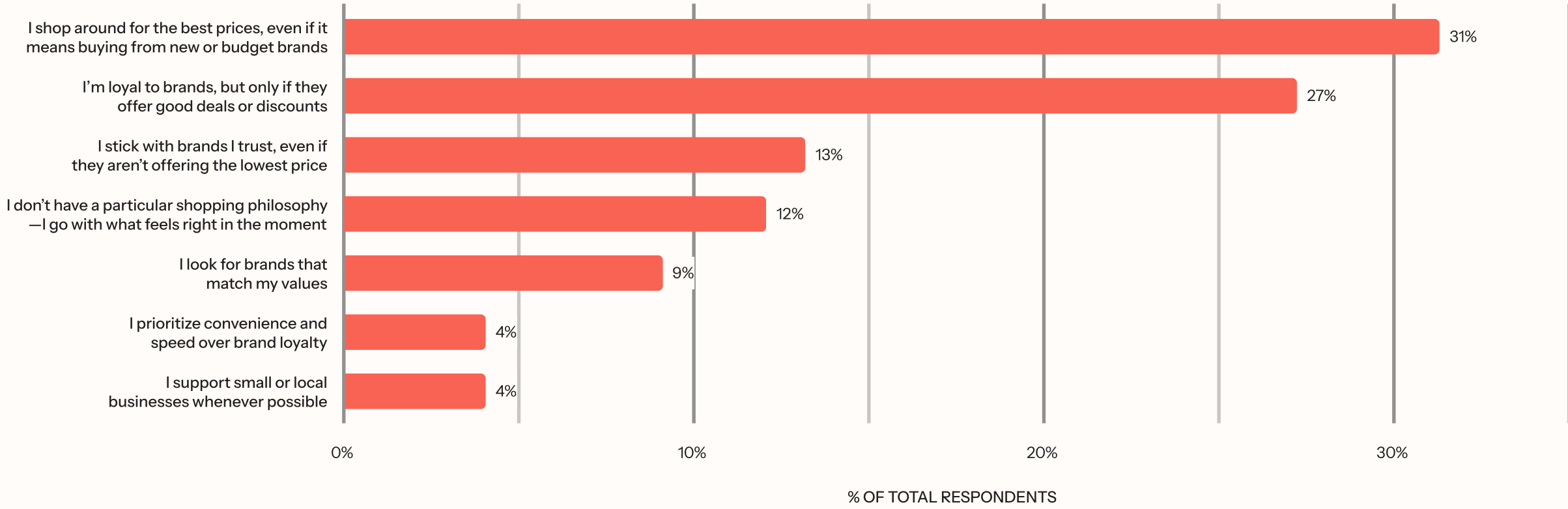
For consumers, staying loyal requires finding value

In this climate, how can brands keep their customers? It comes down to value. 50% of shoppers say consistently great prices or overall value, or special deals or discounts, are most likely to keep them loyal to the brands they already shop with. More often than not, “value” comes down to price. Over half (58%) of consumers say their 2025 holiday gifting philosophy will come down to shopping around for the best deals—even if it means buying from new or budget brands—and only remaining loyal to brands that offer good deals or discounts.

Given the current economic climate, what is most likely to keep you loyal to your favorite brands when buying gifts for yourself or others for the 2025 holiday season? (select one)

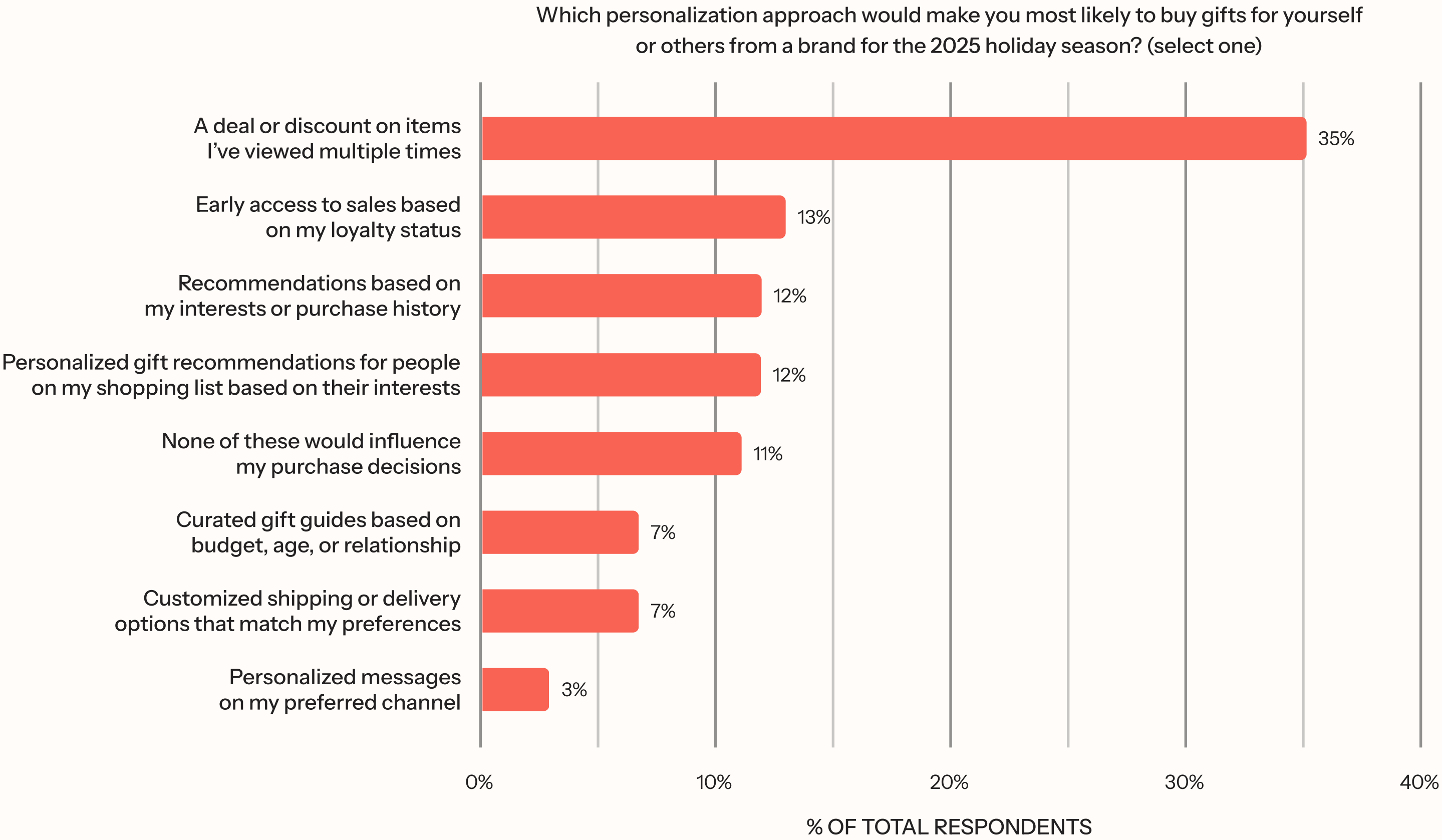


Which statement best describes your philosophy when buying gifts for yourself or others for the 2025 holiday season? (select one)

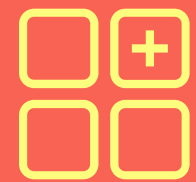


Consumers want brands to take note of their browsing habits

Personalization is a powerful way for brands to demonstrate their value, and listening (or in this case, data collection and analysis), is everything. Brands need to pay attention to their customers’ browsing habits, and strike while the iron is hot. When we asked which personalization approach would make consumers most want to buy gifts for themselves and others, the most popular response was “a deal or discount on items I’ve viewed multiple times.”



What marketers can do



Create hyper-targeted discounts, powered by precise segmentation.

Just because consumers care about discounts doesn't make it sustainable to discount for everyone, all the time.

- Use [Klaviyo's powerful segmentation](#) to target customers based on real-time behaviors, preferences, and lifecycle stage. Build segments that reflect what your customers actually care about—like recent product views, past purchases, or discount sensitivity—then tailor your offers accordingly.



Use discounts and bundles to increase average order value (AOV).

Tiered discounts (10% off \$100 spend, \$15% off \$150, etc.) encourage consumers to shop more while also rewarding them. Bundling items together drives AOV while still benefiting the customer.

- Use [Klaviyo's predictive analytics](#) to identify customers who are most likely to spend more, or those who tend to wait for a deal before buying. Then, target them with tiered discounts or strategic bundles that drive higher AOV.

☆ AI Spotlight

Targeted discounts require good data, analyzed by powerful AI

Predictive analytics

Forecast customers’ churn risk and next order date and target them with appropriate offers.

Klaviyo Customer Hub

Bring onsite personalization to life by showing every customer a message tailored to them.

Product recommendations

Highlight products each customer might like the most based on their browsing and order history.

Every Man Jack boosts Klaviyo revenue using predictive analytics

Men’s personal care brand Every Man Jack relies on retention and customer engagement to grow. Klaviyo AI helps them generate personalized predictions about every subscriber so the team can create replenishment flows according to each customer’s unique predicted next order date.

In a recent 90-day period, 12.4% of their Klaviyo-attributed revenue came from predictive analytics segments.

“I trust and value Klaviyo AI because it saves me time, helps me leverage our customer data to personalize email timing and strategies, and, most importantly, I maintain complete control over how and when it’s used,” says Troy Petrunoff, senior retention marketing manager at Every Man Jack. “Klaviyo integrations and AI allow me to weave a very intricate web.”



Klaviyo integrations

Predictive analytics

From inbox to app: the shift to mobile-first brand relationships.

Email has long been shoppers' preferred channel for brand communications. But in the next year, we expect to see channels like text messaging, push notifications, and WhatsApp gain ground.

SMS marketing

Push notifications



WhatsApp is more in demand outside North America...

More consumers make their first holiday purchase in October than in any other month (17%), but even more (XX%) start holiday shopping during the summer (June–August). North American consumers are the earliest holiday shoppers, with 24% making their first purchase in October and 21% in November—both higher than the global average.

4x
preference for WhatsApp for product notifications in Europe and Asia Pacific vs. North America

3x
preference for WhatsApp for sale/discount alerts in Asia Pacific vs. North America

North Americans prefer texts for new product announcements—about 50% more than shoppers in Europe or Asia Pacific.

...and text messaging is more in demand among Gen Z

Gen Z shoppers are 25% more likely to prefer text message marketing and 33% more likely to prefer mobile app notifications for new product announcements than the general population. When it comes to sales and discount notifications, they’re also nearly twice as likely to rely on social media or WhatsApp and 50% more likely to prefer mobile notifications.

How consumers want to receive brand messages

While email dominates channel preferences, mobile-first channels occupy at least 3 of the top 5 preferred channels across message types.

Message type	Channels (Global)	Channels (North America)	Channels (Europe)	Channels (Asia Pacific)
New product announcements	1. Email 2. Text message 3. Social media 4. Mobile app 5. WhatsApp	1. Email 2. Text message 3. Social media 4. Mobile app 5. Website/live chat	1. Email 2. Text message 3. Social media 4. WhatsApp 5. Website/live chat	1. Email 2. Social media 3. Text message 4. WhatsApp 5. Mobile app
Sale or discount notifications	1. Email 2. Text message 3. Social media 4. Mobile app 5. WhatsApp	1. Email 2. Text message 3. Mobile app 4. Social media 5. Website/live chat	1. Email 2. Text message 3. Mobile app 4. WhatsApp 5. Social media	1. Email 2. Text message 3. WhatsApp 4. Mobile app 5. Social media
Order confirmations	1. Email 2. Text message 3. Mobile app 4. Social media 5. WhatsApp	1. Email 2. Text message 3. Mobile app 4. Social media 5. WhatsApp	1. Email 2. Text message 3. Mobile app 4. WhatsApp 5. Social media	1. Email 2. Text message 3. Mobile app 4. WhatsApp 5. Social media
Shipping updates	1. Email 2. Text message 3. Mobile app 4. WhatsApp 5. Social media	1. Email 2. Text message 3. Mobile app 4. Social media 5. WhatsApp	1. Email 2. Text message 3. WhatsApp 4. Mobile app 5. Social media	1. Email 2. Text message 3. Mobile app 4. WhatsApp 5. Social media
Customer service inquiries	1. Email 2. Text message 3. Mobile app 4. Phone call 5. WhatsApp	1. Email 2. Text message 3. Phone call 4. Mobile app 5. Website/live chat	1. Email 2. Text message 3. WhatsApp 4. Mobile app 5. Phone call	1. Email 2. Text message 3. WhatsApp 4. Mobile app 5. Phone call

Texts drive more first-time purchases than email

Klaviyo data shows SMS consistently outperforms email when it comes to converting new customers. In every quarter since Q2 2024, nearly 30% of SMS-driven orders have come from new buyers—compared to just 19–21% for email. That makes SMS a stronger channel for turning browsers into first-time customers. As marketers look to grow their base, SMS can play a key role in acquisition—especially when paired with personalized, time-sensitive campaigns.



Text messaging

- 1. Relevant promo codes
- 2. New product/ inventory alerts
- 3. Personalized messages based on preferences and order history



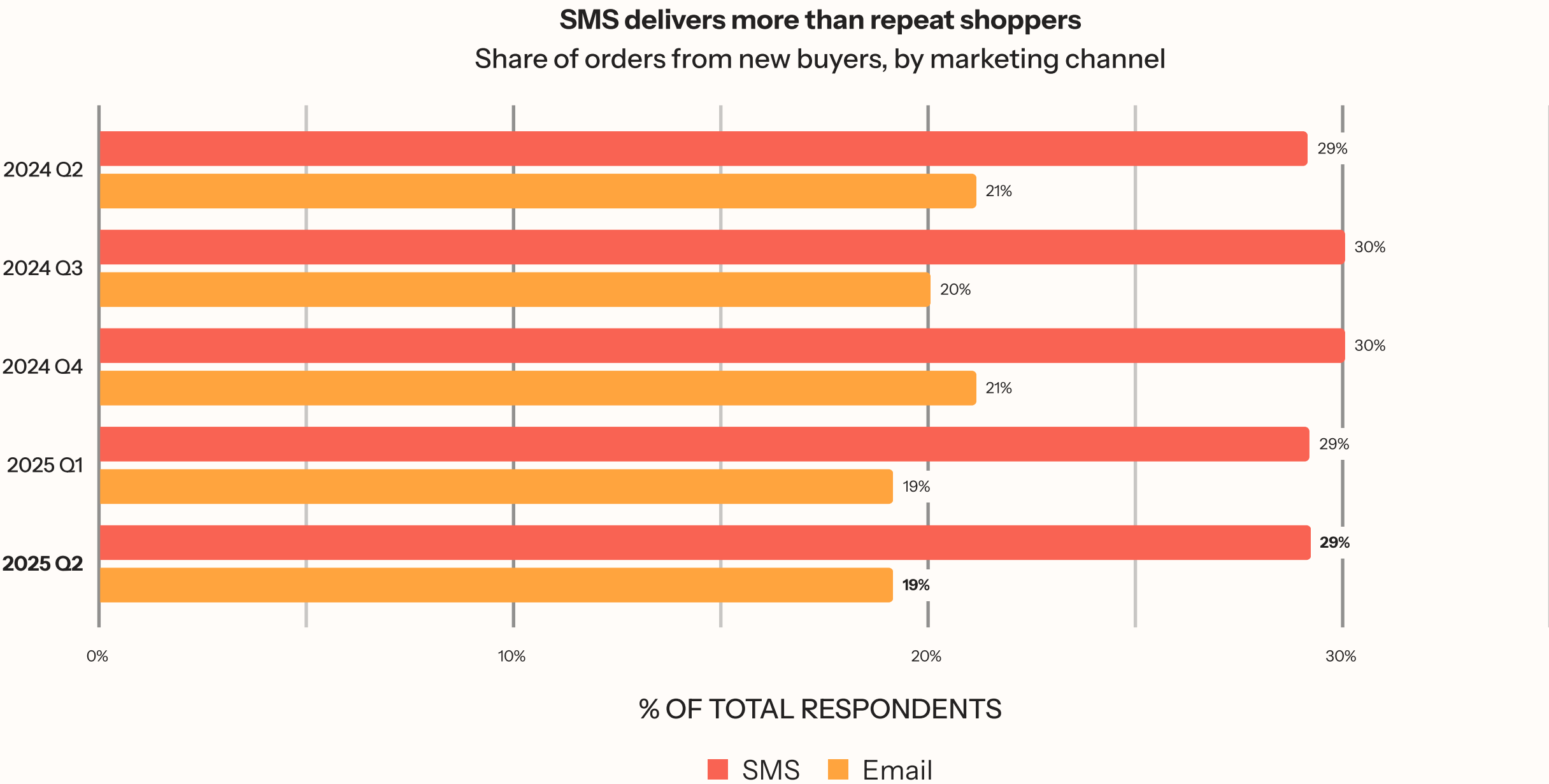
WhatsApp

- 1. Relevant promo codes
- 2. Personalized messages based on preferences and order history
- 3. New product/ inventory alerts



Mobile push notifications

- 1. Relevant promo codes
- 2. Messages that aren't frequent or annoying
- 3. New product/ inventory alerts



What marketers can do



Create hyper-targeted discounts, powered by precise segmentation.

Just because consumers care about discounts doesn't make it sustainable to discount for everyone, all the time.

- Use AI-powered channel affinity to learn each customers' channel preferences, so you can reach them where they're most engaged.



Use mobile-first channels for time-sensitive messages that drive action.

Use text messaging, WhatsApp, and mobile push notifications to reach your customers in the moment so they don't miss out.

- With Klaviyo's omnichannel campaign builder, you can coordinate these touchpoints alongside email, social, and more—all informed by unified customer insights.



Maintain a cadence that engages, but doesn't overwhelm.

Whether you're marketing via email or text (ideally both!), the right cadence is key to driving engagement. Too much communication and you'll increase unsubscribes; too little and you'll miss opportunities to monetize subscribers.

- Use Klaviyo's reputation repair AI to automatically exclude unengaged profiles. This keeps your deliverability rates strong, so inbox providers view your sends more favorably.

AI Spotlight

Every customer is different. Instead of relying on broad-strokes targeting, use AI tools to make sense of it all

Forms display optimization

Show web forms at just the right time to get more sign-ups for email and SMS.

Industry benchmarks

Compare campaign performance against your industry and personalized peer group.

Generative AI

Generate layouts and copy for email and text campaigns to keep campaigns running smoothly.

Tata Harper drives 65% more sign-ups using forms display optimization

Plant-based skincare brand [Tata Harper Skincare](#) used Klaviyo AI to test and optimize their email and SMS sign-up forms. Using forms display optimization, they were able to generate 20 different variations on placement and timing across desktop and mobile sign-up pop-ups with Klaviyo AI.

In the 30 days after the winning versions went live, [submissions jumped 65%+](#) from the month before.

“Klaviyo’s turnkey solution enables brands to easily leverage their customer data and utilize AI to make real-time optimizations, drive strategy, and stay at the forefront of marketing,” says Heidi Jessop-Maund, SVP of digital at Tata Harper.

Klaviyo AI



The era of AI shopping assistants is here.

AI is already prevalent in marketing. In 2025 and beyond, consumers will rely on AI shopping assistants, too. These tools enhance personal connection and service, rather than replacing human interaction. For example, a personal shopping agent that knows a customer's history can offer proactive, personalized support.

Personalization

Klaviyo AI



More than half of shoppers plan to use AI shopping tools during the 2025 holiday season

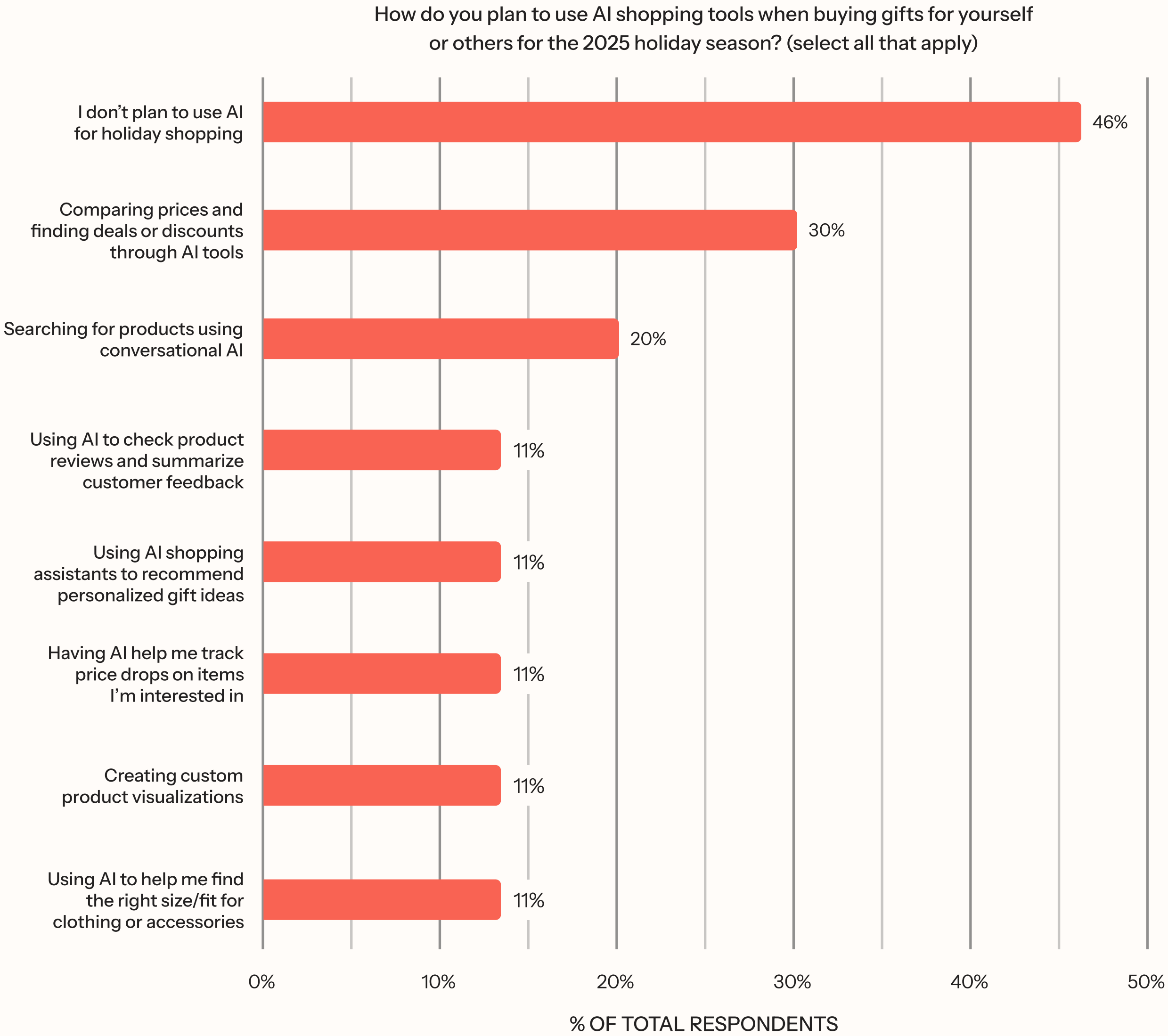
54%

of consumers plan to use AI for holiday shopping.

Top use cases include:

- Comparing prices and finding deals
- Searching for products with chatbots
- Checking product reviews
- Using AI shopping assistants to recommend personalized gift ideas

The brands that are ahead of the curve will appeal to those who want to make the shopping experience easier, faster, and more personalized.



European consumers are the most tech-forward when it comes to AI shopping assistants

57% of European shoppers plan to use AI shopping tools this holiday season, compared to 51% of North American consumers and 55% of consumers in Asia Pacific.

In Asia Pacific, using AI to check product reviews is more popular than searching for products with chatbots or conversational AI, but in North America and Europe, chatbots are more popular. In North America, having AI track price drops is more popular than in Asia Pacific or Europe.

Which of the following holidays or seasons are you most likely to buy gifts for yourself or others due to the availability of deals or discounts? (by region)



Buyers want AI’s help for shopping...

62% of consumers would prefer to shop with an AI assistant that remembers their purchase history over explaining their preferences to sales associates.

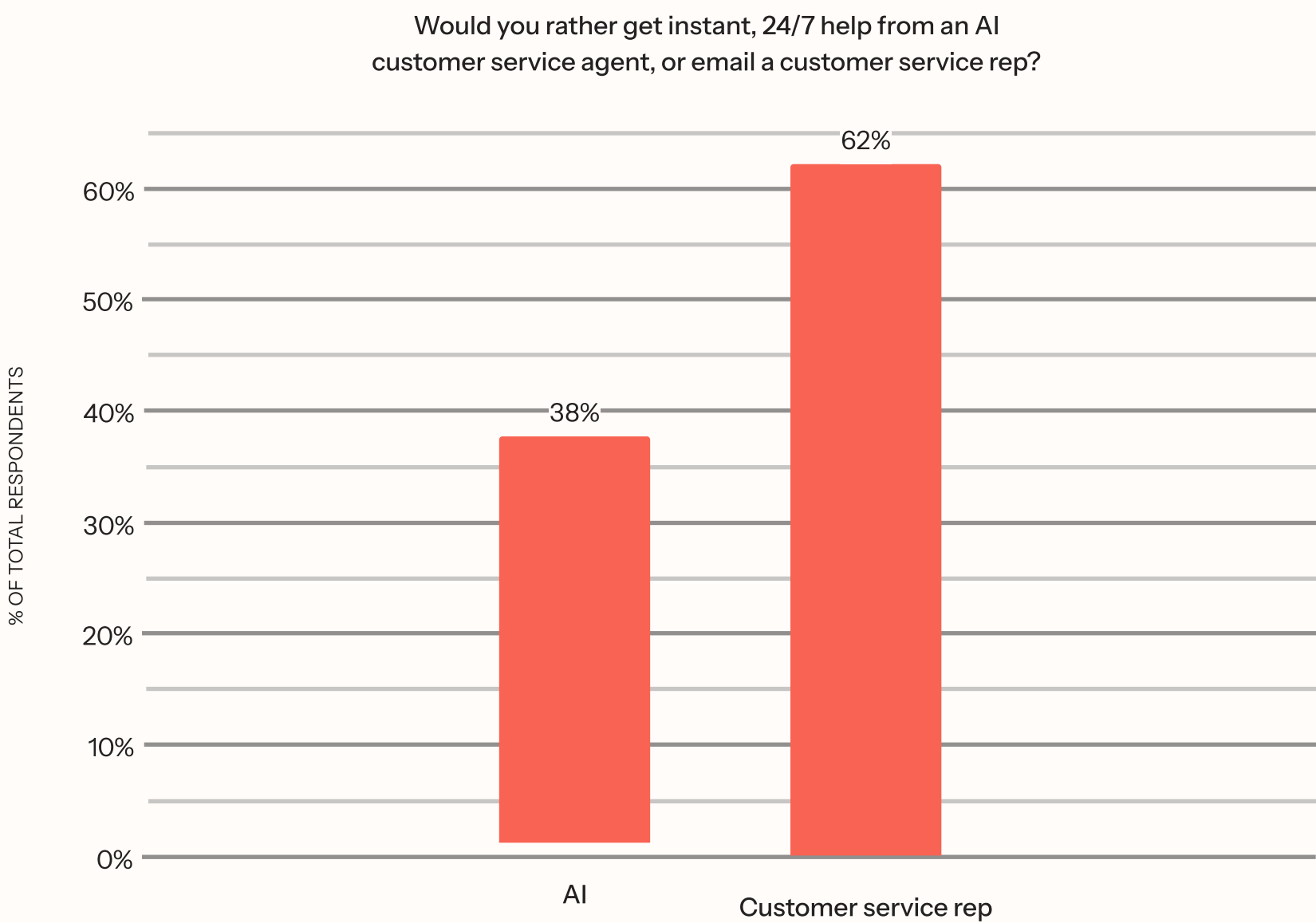
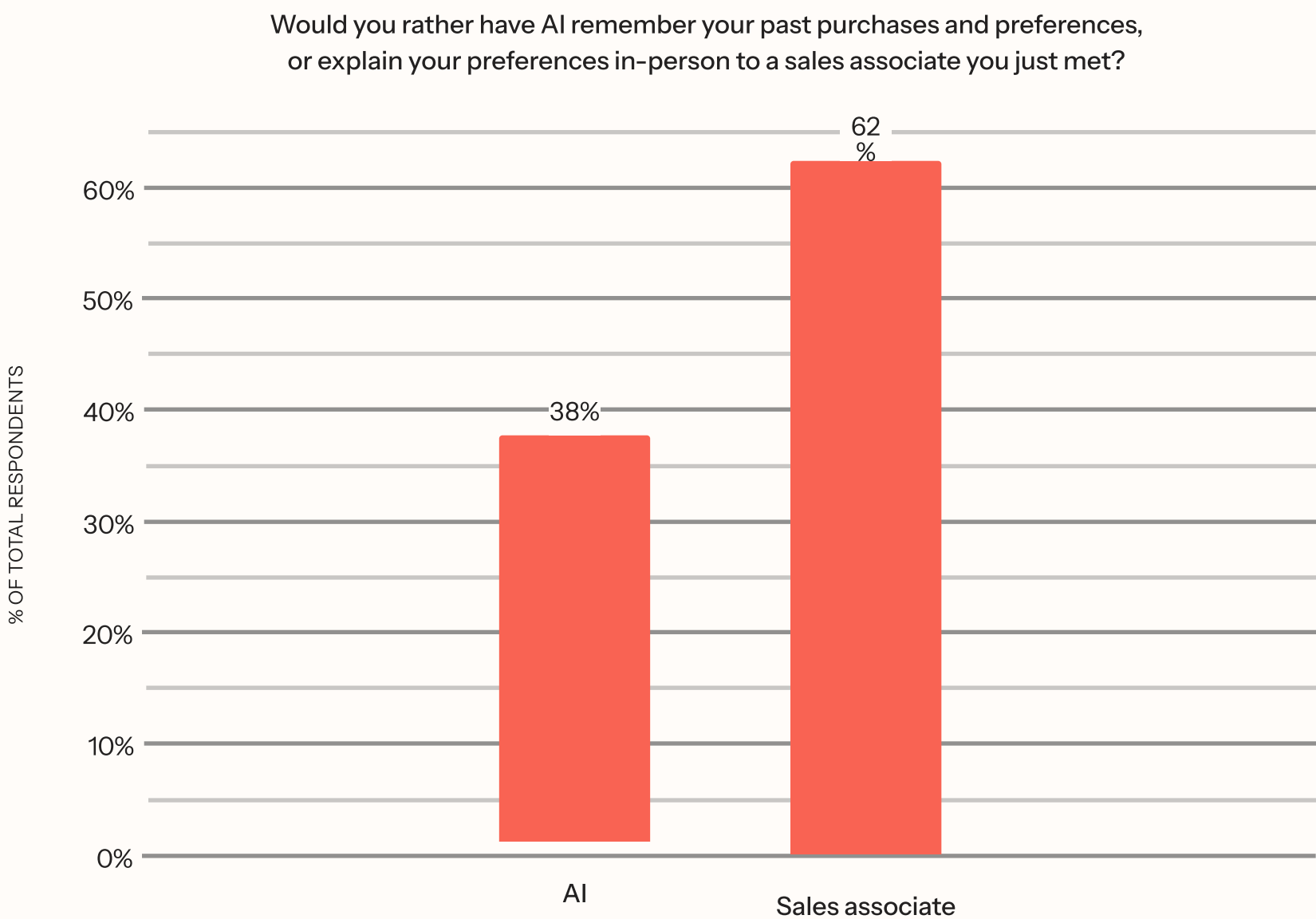
Millennial shoppers are the most enthusiastic about AI remembering their preferences, with 66% in favor—more than any other generational cohort. Respondents earning \$150,000–200,000 a year are the most likely income group to prefer AI at 65%.

...and for service

And the preference for AI doesn’t stop with shopping. Over half of consumers (53%) would rather get instant, 24/7 help from an AI customer service agent than email a human representative.

57% of Gen Z respondents prefer AI-driven customer service—more than any other generation. Millennials are close behind, with 56% preferring AI support over email.

High-income respondents (those earning more than \$200,000 a year) are the most enthusiastic about AI for customer service, with 65% preferring it above emailing a human rep—far above the overall average. In a climate where the competition for share of wallet is stiffer than ever, retailers catering to the customers who are likely to spend more will likely see higher returns.



What marketers can do



Power up customer service with AI agents.

Make sure to keep the experience feeling as human as possible. We recommend using AI agents to provide instant, accurate answers to routine inquiries like checking order status or inventory questions. This frees up human agents to handle more complex interactions and creates a more efficient customer journey that's still human and empathetic.

- Offer always-on customer service by using Klaviyo's conversational AI agent to handle customer questions and free up human agents' time for more complex issues and cut down on customer support tickets that require human resolution.



Use AI to enhance personalization.

Dynamic content, predictive recommendations, optimized send times—these are all ways marketers can satisfy customer expectations that AI will remember their preferences. Paired with an omnichannel strategy, these tools deliver 1:1 experiences at scale.

- Klaviyo's AI product recommendations use real-time shopper behavior and purchase intent to deliver personalized suggestions that increase conversion and AOV.

☆ AI Spotlight

Klaviyo’s conversational AI agent assists shoppers before, during, and after every purchase they make. The future of customer service is human, augmented by AI.

Personalized recommendations

An always-on shopping assistant that helps shoppers decide what to buy

Post-purchase assistance

Takes action for shoppers, like creating returns or fetching order details

24/7 support

Answers product and support questions right on your website

“Consumers are increasingly comfortable shopping with AI. But until now, only the biggest players could afford to build AI shopping assistants that drive purchases, not just answer simple questions. With Klaviyo’s Conversational AI Agent and the rest of our Service suite, we’re giving every brand the ability to offer self-serve experiences that feel as helpful as your best in-store associate.”



- Grant Deken, Head of Product, Klaviyo Service

Welcome, Mia

Arriving today

Order #5240

Recently viewed

Featherweight Running shoes
\$35.99

Add to cart

For you

Orders

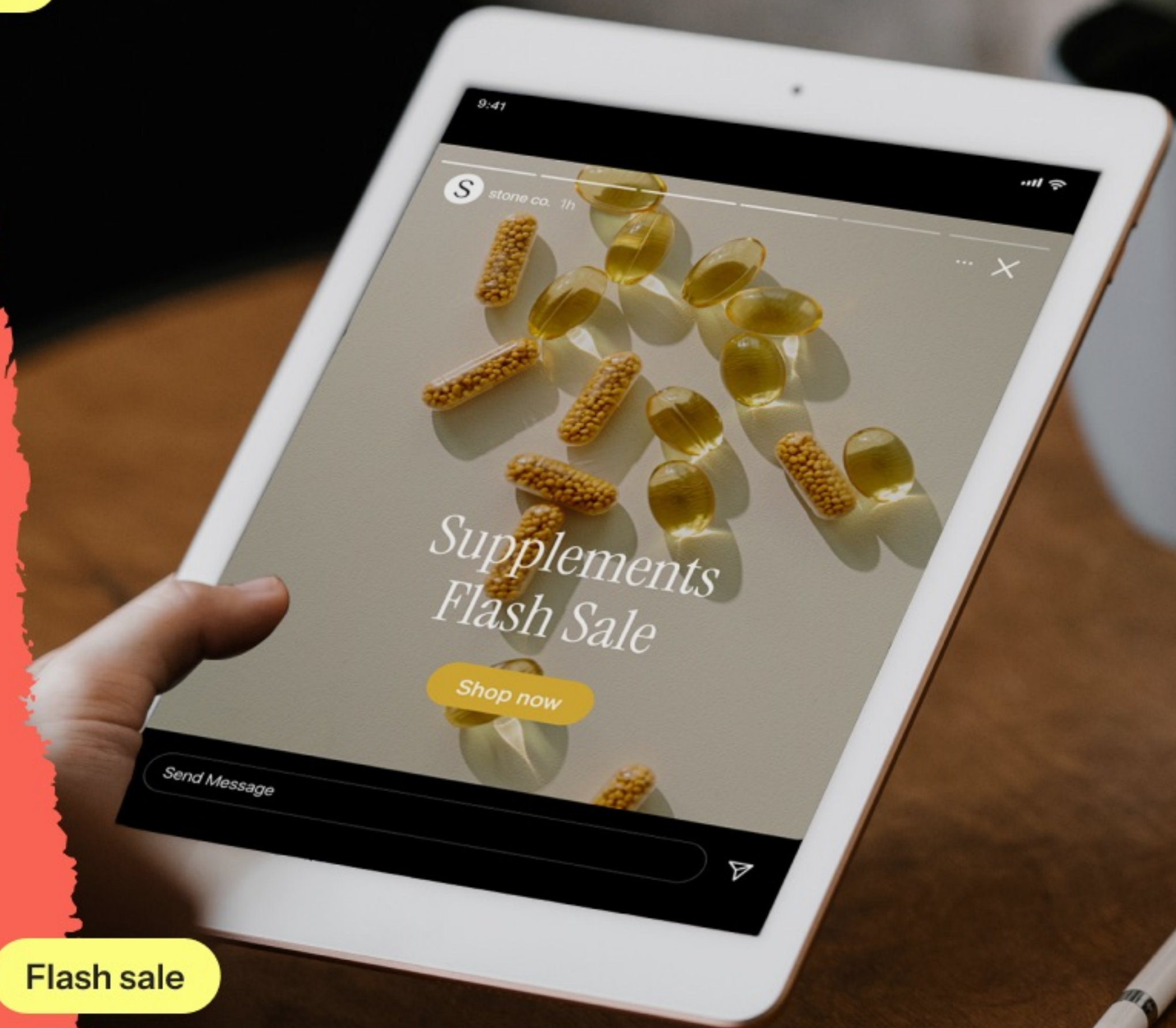
Chat

Profile

The rise of “slow gifting”: why consumers are getting choosy about gift-giving.

Today’s buyers are not only more value-conscious. They’re taking the time to shop around for deals, but they’re also more strategic about when they buy. Expect consumers to budget across a period of months for their holiday shopping and prioritize meaningful purchases—a trend we’re calling “slow gifting.”

20% off now



Flash sale

To find the perfect gift, consumers are spending more time planning and searching for holiday purchases

Consumers will rely heavily on research, reviews, and bundled offers to maximize their gift-giving budget while still delivering thoughtful presents. And with fewer buyers planning to spend \$500+ on gifts this holiday season than in 2024, there's more competition to win a share of their wallets.

65%

of consumers save in advance to buy gifts during the holiday season

57%

of consumers spent \$500+ on gifts in 2024

46%

of consumers plan to spend \$500+ on gifts in 2025

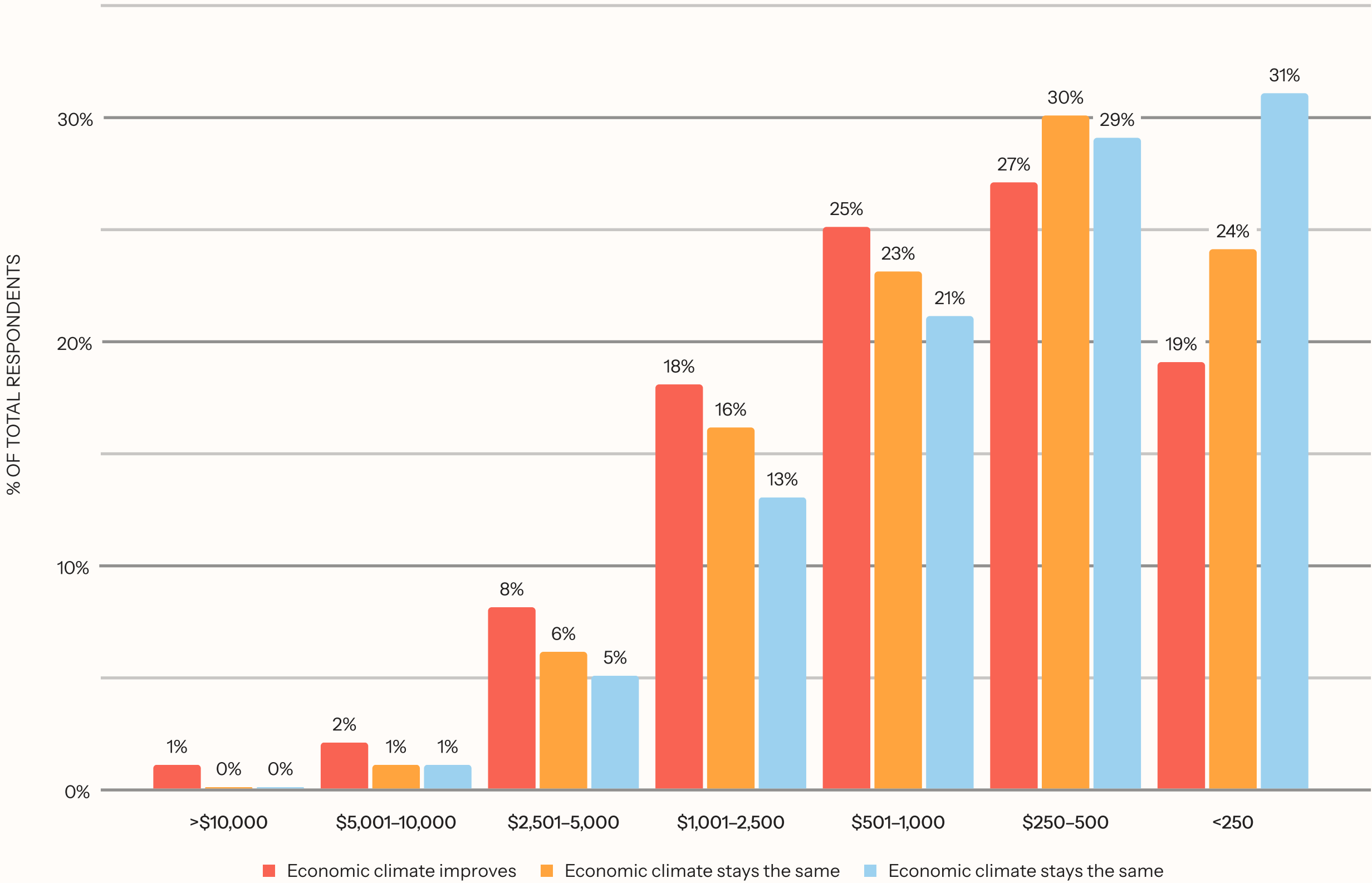
The economic climate determines holiday shopping

Intuitive, right? Here’s how consumers plan to adjust their holiday shopping.

More than half of shoppers plan to spend up to \$500 for the holiday season if the economic climate worsens (60%) or stays the same (54%).

Above the \$1,000 mark is where we see the most movement. While fewer than 1 in 4 shoppers plan to spend this much in a worse (19%) economy or one that stays the same (23%), nearly one-third (29%) plan to spend \$1,000 or more if the economy improves.

Approximately how much do you plan to spend buying gifts for yourself or others for the 2025 holiday season in the following scenarios? (select one for each category)

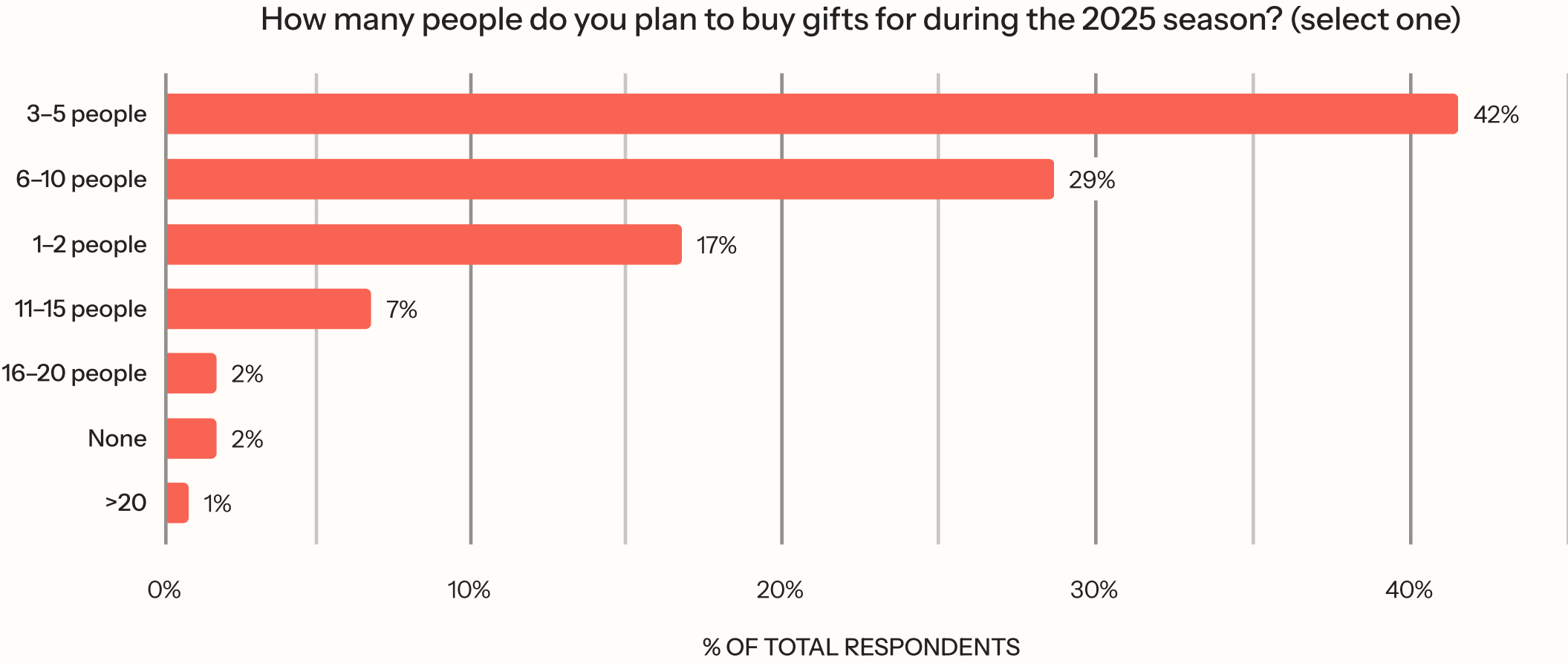


How consumers plan to gift their loved ones this year

Nearly two-thirds of shoppers (59%) plan to buy gifts for 1–5 people, with another third (29%) gifting for 6–10. Only 10% plan to shop for more than that, and 2% don’t plan to buy gifts at all.

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Here’s what shoppers look for when buying gifts for themselves or others during the holiday season, ranked in order of importance:

1. Sale pricing
2. Free shipping, shipping discounts, expedited shipping
3. Promotional codes
4. Loyalty program perks, member-only discounts
5. Positive product or brand reviews/ratings
6. Bundled offers
7. Limited inventory
8. Sustainable/ethical brand values
9. Celebrity/influencer endorsements

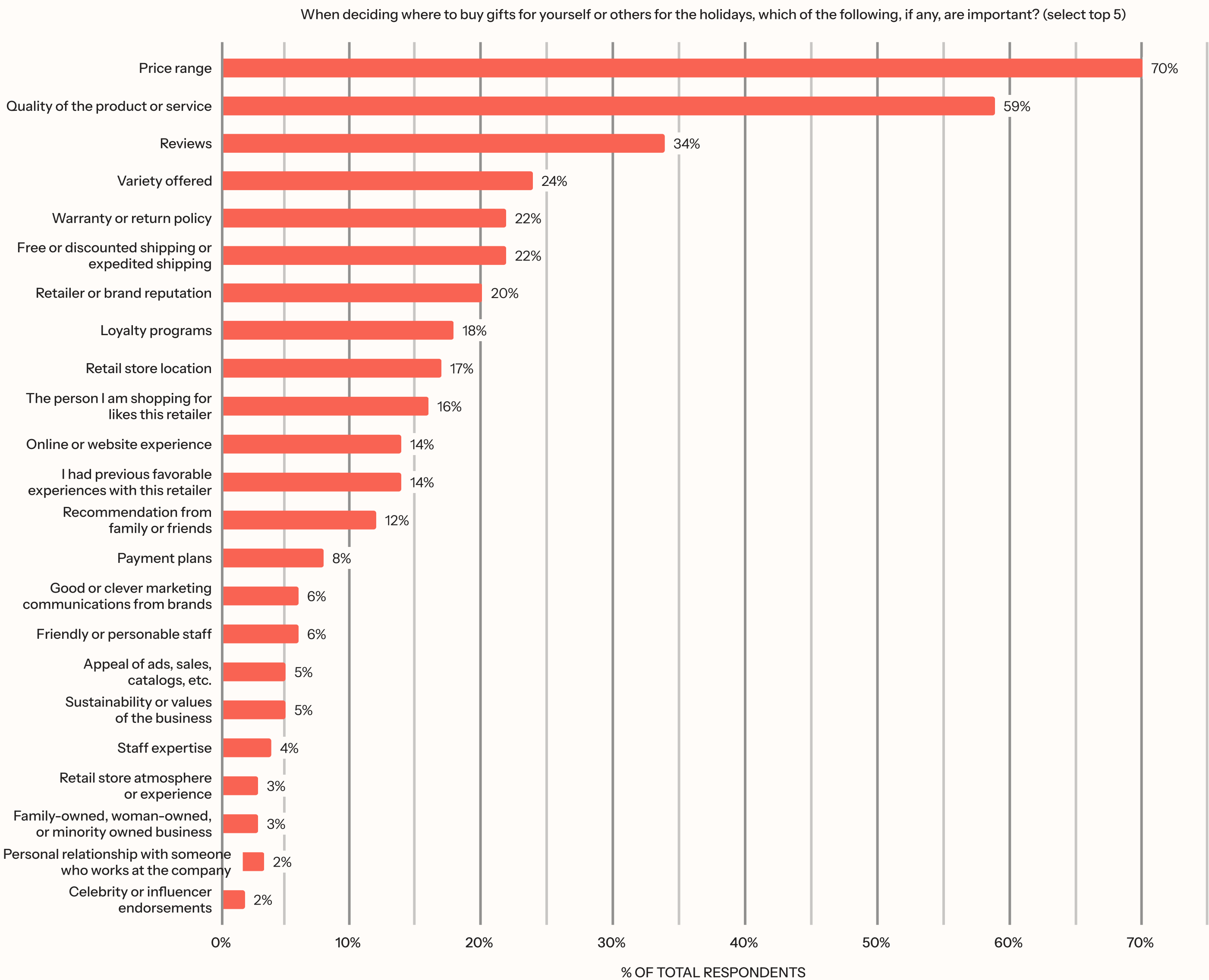
THE RISE OF “SLOW GIFTING”

When choosing which brands to shop with, price matters—but so do quality, reviews, and variety.

Across regions, consumers in Asia Pacific are more likely to prioritize warranties and return policies than other regions (24% vs. 22% in North America and 20% in Europe). North American consumers care about free or discounted/expedited shipping more than other regions (26% vs. 24% in Asia Pacific and just 16% in Europe). Retailer or brand reputation is most important to consumers in Asia Pacific (22%) compared to those in North America (18%) and Europe (19%).

By generation, Gen X (25%) and baby boomers (30%) care most about free or discounted/expedited shipping compared to millennials (16%) and Gen Z (13%). Older generations are also more influenced by loyalty programs than younger generations. 22% of baby boomers and 21% of Gen X consider loyalty programs, vs. 16% of millennials and 10% of Gen Z.

Younger consumers care more about reviews and variety. Gen Z (45%) and millennials (42%) are more interested than Gen X (34%) and baby boomers (20%) in reviews. And Gen Z (27%) and millennials (26%) prioritize variety over Gen X (23%) and baby boomers (20%).



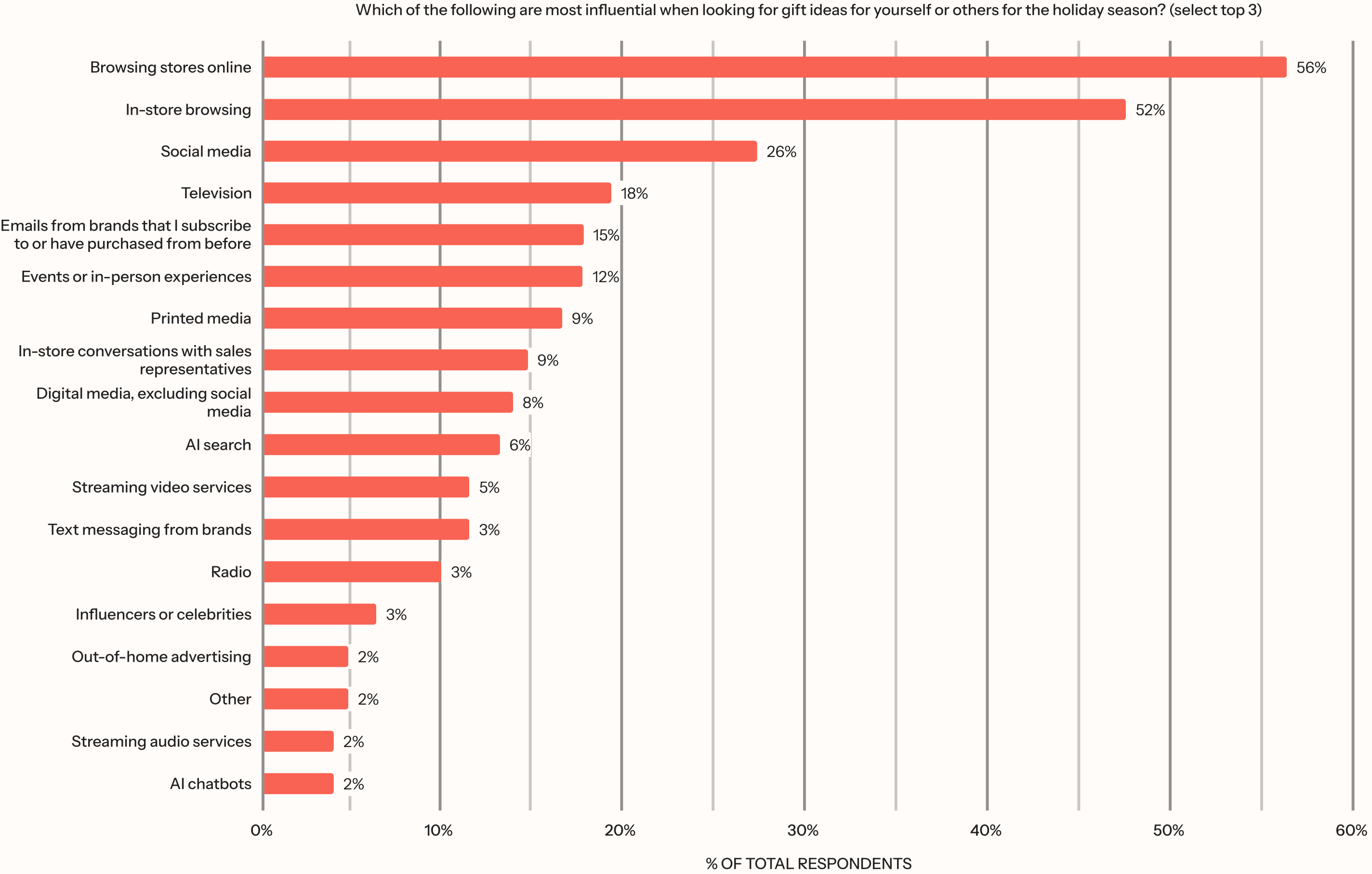
THE RISE OF “SLOW GIFTING”

When it comes to researching gift ideas, consumers turn to both online and in-person browsing at nearly the same rate globally. Both options are more than twice as popular as the third most influential channel, social media.

In-store browsing is the most influential factor for consumers who save 12 months or more in advance for the holiday season, as well as for consumers who have switched to more affordable or value-based brands. This suggests that more traditional or conservative shoppers may prefer traditional shopping channels compared to digital channels.

The most influential factors by generation are:

- Gen Z: browsing stores online
- Millennials: browsing stores online
- Gen X: browsing stores online
- Baby boomers: in-store browsing



What marketers can do



Leverage social proof to build gift-buying confidence.

Since reviews are increasingly important (especially for younger consumers), highlight customer reviews, ratings, and user-generated content in gift-focused campaigns. Create review-driven gift guides and showcase highly-rated products.

- Supercharge growth and boost conversions with less spending. Use Klaviyo’s audience sync to create lookalike audiences for targeted social ads.



Implement savings-focused loyalty programs.

Since consumers are planning ahead and saving for gifts, create loyalty programs that reward early shopping, gift bundle purchases, or referrals. Offer exclusive early access to gift collections or sales for loyalty members.

- Create VIP loyalty programs based on Klaviyo data to reward loyal customers, provide outstanding customer service, and personalize marketing for this valuable segment.



Create gift-giving guidance and educational content.

As consumers become more thoughtful about their purchases, do your part to reduce uncertainty and create clarity. Offer value through gift guides, sizing charts, care instructions, and return policies. All of these can help make consumers feel confident and informed when buying gifts.

- Use Customer Hub to provide self-service gift guides, size charts, and return information, empowering customers to find what they’re looking for without overwhelming your customer service team.

☆ AI Spotlight

Help your customers make the most of their holiday shopping experience with smarter resources that are genuinely helpful

Review sentiment AI

Understand how customers feel about certain products by analyzing feedback, and take action on anything subpar.

AI-powered review headlines

Automatically surface suggested review headlines based on the content of a shopper’s review.

Happy Wax uses Klaviyo AI to choose relevant review quotes

Happy Wax, a home fragrance brand, uses Klaviyo AI to improve their email automations with reviews and social proof. They use AI to select the most relevant review quotes for each customer in their abandoned cart and win-back flows. For example, it might surface a testimonial about a specific product that a customer just abandoned.

So far, flows with review blocks are driving more clicks and revenue per recipient. “It’s definitely working,” says Rachel Fagan, VP of marketing. “We’re figuring out how we can integrate review blocks into all our Klaviyo flows.”

Email automations

Reviews



The single-channel shopper is extinct. Omnichannel is the new reality for brands.

Omnichannel is no longer optional. It's the smarter way to grow. Today's customers don't shop in a straight line. They jump between email, WhatsApp, text messaging, push notifications, social, and in-store—often in the same day. And most marketing stacks just weren't built for that kind of behavior. Until now.

Omnichannel

Tech stack

The rigid lines between online and in-store shopping, already blurred, will dissolve entirely

Consumers expect a fluid, interconnected experience no matter where they are. Physical stores are still critical hubs for discovery and service, but they must be seamlessly integrated with digital channels to reflect modern buyer behavior. Brands that provide disconnected experiences risk being abandoned.

77%

of shoppers use 3–4 channels to buy non-essential products in 2025.

33%

of shoppers are most likely to shop with fashion/apparel brands in-store.

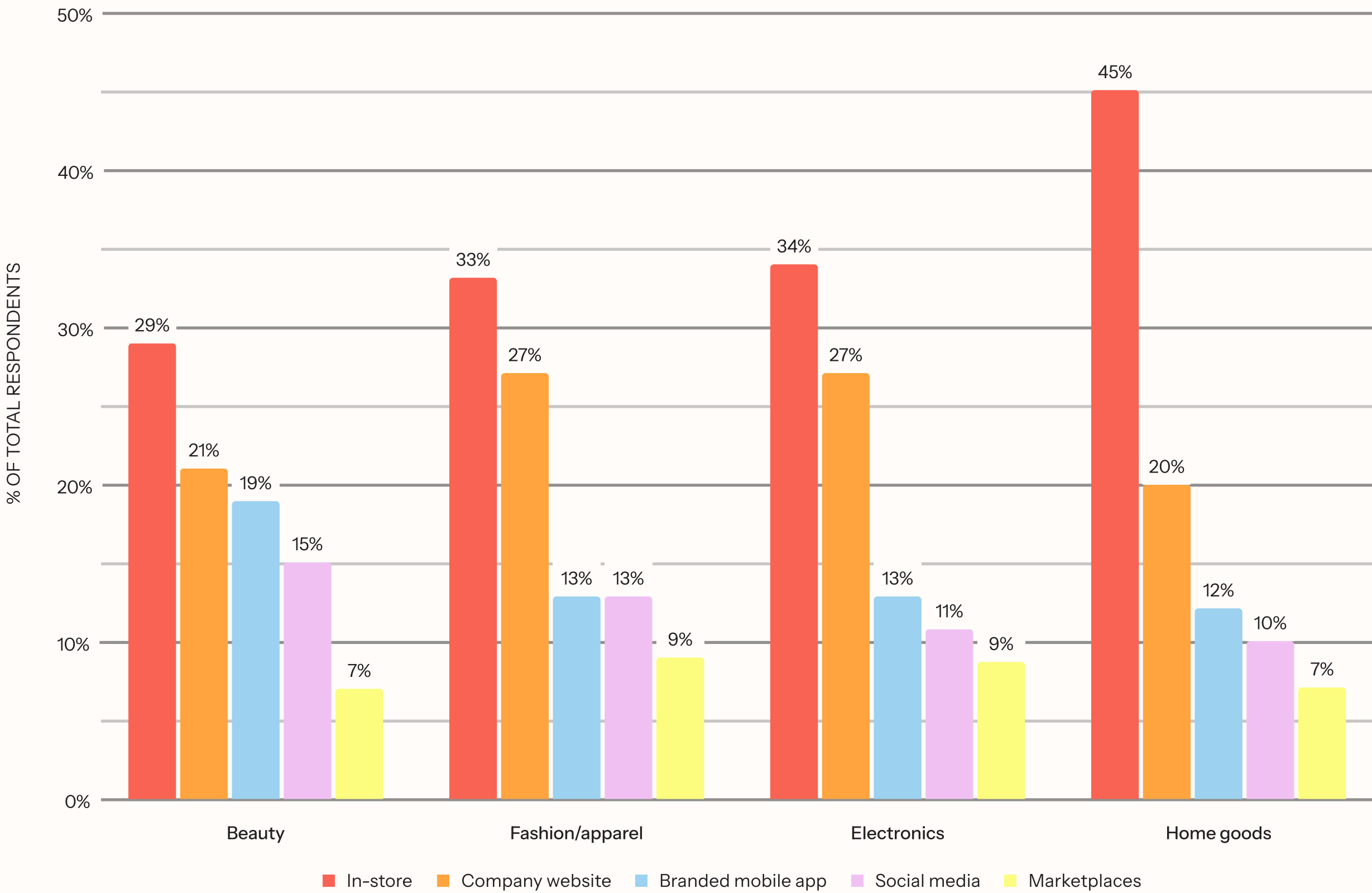
40%

of shoppers are most likely to shop with fashion/apparel brands on their websites or mobile apps.

How consumers want to receive brand messages

While email dominates channel preferences, mobile-first channels occupy at least 3 of the top 5 preferred channels across message types.

Which of the following channels do you use most often to make purchases from a brand for fun, non-essential products or services?



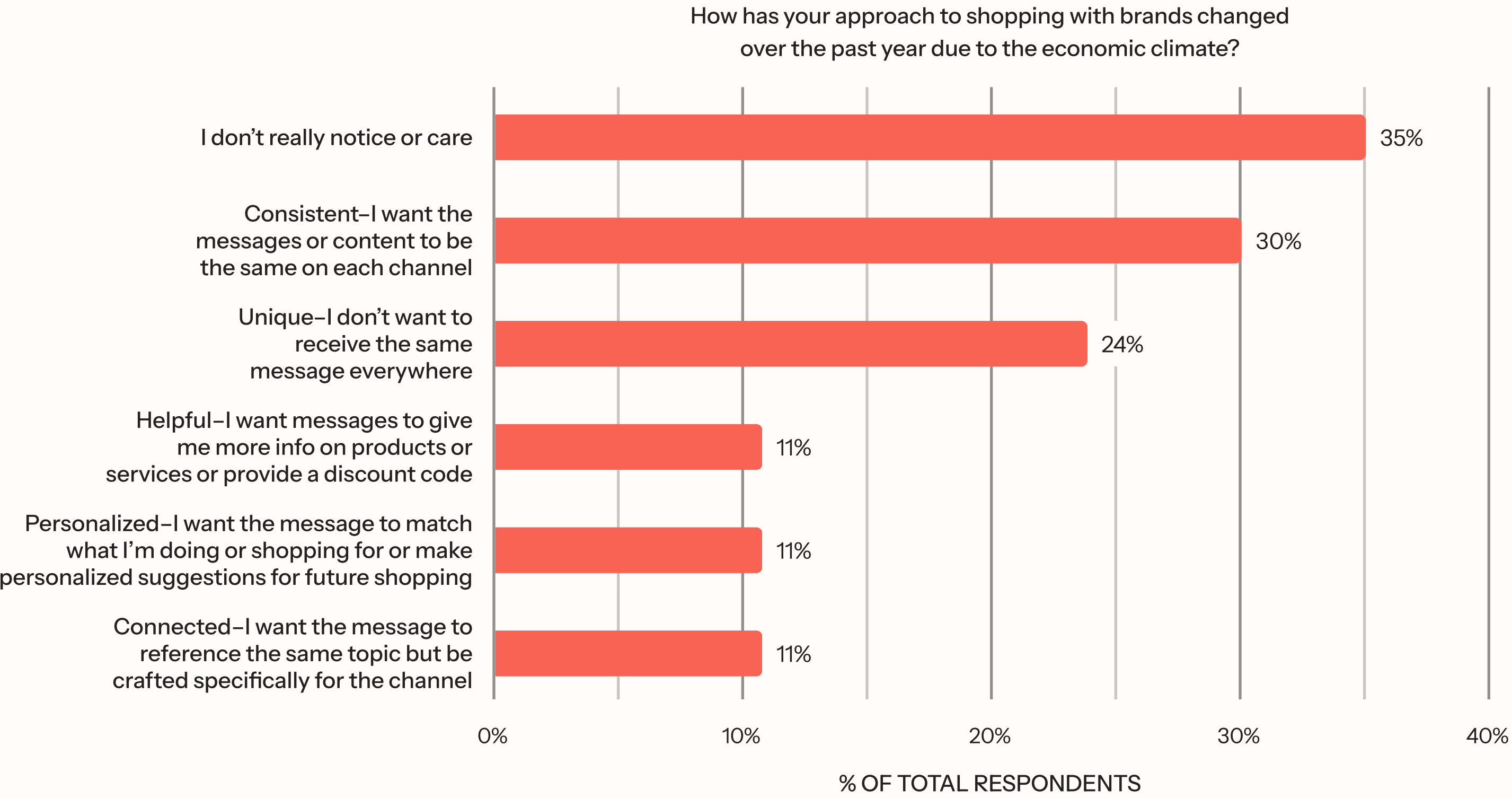
Shoppers expect connected, personalized, helpful experiences

As you craft omnichannel campaigns, be aware of what customers want from omnichannel messaging.

When asked how consumers expect brand messages to feel when they receive them in different places, shoppers in Europe and Asia Pacific are most likely to expect a connected brand experience across channels—defined as messages that reference the same topic but are crafted specifically for the channel (47% and 33%, respectively). In North America, they’re most likely to expect a personalized experience—defined as messages that match what they’re doing or shopping for, or personalized suggestions for future shopping (38%).

The highest earners (\$200,000+ annually) are most likely to expect helpful experiences (42%)—defined as messages that provide more information on products or services, or provide a discount code.

The bottom line: brands need to not only offer omnichannel experiences, but consider how they’re delivering these experiences with the customer in mind.



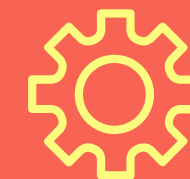
What marketers can do



Understand the full customer experience.

Analyze data from every phase of the customer journey, every channel, and every segment to find out what's moving the needle, and where you may be missing revenue opportunities.

- [Klaviyo Analytics](#) helps you uncover trends and hone your strategy by connecting the dots between every interaction.



Connect in-store and digital experiences.

Collect data from in-store interactions to use in online marketing, such as using geographical data to target frequent digital customers with in-store promotions (and vice-versa).

- Try integrations like the [Square Up x Klaviyo POS integration](#) to collect data from in-person customers at retail locations and add it to digital customer profiles.

☆ AI Spotlight

Aggregate all of your channels into one mission control for your campaigns with Klaviyo’s AI-powered omnichannel campaign builder.

Manage all your channels from one launchpad

Easily build multi-step campaigns across email, text, push, and WhatsApp.

Learn how customers engage

Easily build multi-step campaigns across email, text, push, and WhatsApp.

Use attribution that tells a full story

Easily build multi-step campaigns across email, text, push, and WhatsApp.

Tatcha creates a cohesive promotion experience across channels with Klaviyo

To grow their annual Fukubukuro, or “lucky bag,” promotion to a bigger scale than ever, luxury beauty brand Tatcha took an omnichannel approach—and used Klaviyo to execute a major swath of it.

Ultimately, Fukubukuro 2025 exceeded expectations. Ecommerce revenue jumped 20% YoY, and revenue from flows jumped 70%. In total, Klaviyo drove 47% of Tatcha’s ecommerce revenue during the promotion, and using the B2C CRM for email, text messaging, and sign-up forms helped the team create a cohesive experience across channels.

“Having Klaviyo as our source of truth for all of our data across performance and user engagement, and trusting that it’s accurate and cohesive—it’s critical to understanding how people are actually engaging and shopping,” says Shannon Jörgenfelt, senior manager of email and retention at Tatcha.

Omnichannel

Data platform

Stop chasing trends, start building relationships

The data has spoken: customers are more selective, budgets are tighter, and generic, one-way marketing isn't cutting it anymore. While your competitors are sending the same Black Friday email year after year, smart brands like yours are having conversations with customers—and keeping up with them as their journeys get more complex and less linear.

Consumers are choosing the brands that actually know them. They want to buy from the one that remembers they shop early for holidays, or knows that they've looked at the same top 4x this week—and that with the right discount, they'll be ready to buy.

Smart brands think in relationships, not channels. They recognize that Taylor shops early and prefers mobile, while Rosalie is a last-minute buyer who browses in-store and shops online. They're using AI to genuinely speak to every buyer and meet them where they are.

The brands getting it right are building loyalty that survives economic uncertainty. They're turning one-time buyers into advocates. They're using data at every touchpoint to prove they understand what matters to each individual customer.

This BFCM season and beyond, the brands that stand out aren't chasing trends. They're fundamentally rethinking how they operate to build better relationships and create lovable experiences at every turn.

“We started with a simple idea: that businesses should own their customer data and use it to create better, more personalized experiences.”

—Andrew Bialecki, CEO and co-founder, Klaviyo



Klaviyo is the B2C CRM built for modern brands

With marketing, service, and analytics in a single platform, you can grow faster, personalize smarter, and win bigger while overdelivering on expectations. Klaviyo B2C CRM is more than a marketing automation platform. We're your strategic partner that unifies your customer data, infuses AI into every touchpoint, and supports better omnichannel experiences.

Klaviyo Marketing

Understand how customers feel about certain products by analyzing feedback, and take action on anything subpar.

Klaviyo Service

Automatically surface suggested review headlines based on the content of a shopper's review.

Klaviyo Analytics

Automatically surface suggested review headlines based on the content of a shopper's review.

[Explore the platform](#) | [Watch a demo](#)



The only CRM built for B2C

VIP access

BFCM sale



Survey methodology

With marketing, service, and analytics in a single platform, you can grow faster, personalize smarter, and win bigger while overdelivering on expectations. Klaviyo B2C CRM is more than a marketing automation platform. We're your strategic partner that unifies your customer data, infuses AI into every touchpoint, and supports better omnichannel experiences.

This report was informed by two surveys administered to a combined 7,000 consumers in May 2025 in collaboration with Datalily. The omnichannel shopping survey focused on consumers' channel preferences when making non-essential purchases, and the BFCM consumer survey was administered to consumers planning to shop during the BFCM or holiday 2025 season.

The omnichannel survey respondents were located in the US (35%), the UK (35%), New Zealand (15%), and Australia (15%). 40% were millennials, 28% Gen X, 18% Gen Z, and 14% baby boomers.

The BFCM survey was administered to respondents in North America (35%), Europe (35%), and Asia Pacific (30%). Countries included the US, Ireland, France, Germany, Sweden, Norway, Finland, Denmark, Australia, New Zealand, Singapore, and Malaysia. 34% were millennials, 29% baby boomers, 24% Gen X, and 13% Gen Z.

Report created in collaboration with Datalily
www.datalily.com • hello@datalily.com

Review discount

Early access

Flash sale

