

UNITED STATES



**Cart of the deal**

# America's appetite for Black Friday & Cyber Monday 2025





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# Foreword



In 2025, tariffs, trade war and persistent inflation all contributed to a sense of economic uncertainty. Yet, as the 2025 holiday season approaches, consumer interest in Black Friday (39%) and Cyber Monday (38%) remains steady. Younger adults - especially Gen Z and Millennials - are more likely to participate, with 58% planning to shop the events. Still, enthusiasm is mixed. Over a third of Americans (36%) say their interest in mega sales events has declined in the past few years, citing misleading discounts, lower product quality, and financial pressures as key reasons.

This report explores how US consumers are approaching BF/CM in 2025, including who plans to shop, what they intend to buy, how much they'll spend, and what's driving both interest and skepticism around mega sales events."

**Ashley Brown**

Senior Director, Account Management

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# Report takeaways



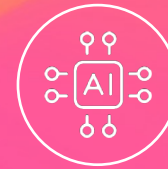
## Younger consumers driving BF/CM participation

Gen Z and Millennials are significantly more likely to shop BF/CM (**57%**) compared to Gen X and Baby Boomers+ (**38%**), highlighting a generational divide in engagement with mega sales events.



## Consumer participation is steady but interest is softening

Overall intent to shop remains stable, but **36%** of consumers say they're less interested in mega sales events than they were 2–3 years ago.



## Skepticism toward AI in gifting remains high

While some Gen Z and Millennial shoppers express curiosity about AI-assisted gifting, only **18%** say they would trust AI to pick gifts for loved ones, and many say it would negatively impact their perception of the gift.



# Powered by the YouGov panel

The insights in this report are fueled by YouGov's consumer research panel, which has 30 million registered members from 55+ markets.

Every day, our members trust us with their data and opinions – enabling us to gain insights into behaviors and attitudes from people of all ages, backgrounds and beliefs.

Inclusion is essential for our members, our clients, and our mission. We invest millions each year to ensure we can create truly nationally representative online samples and access hard-to-reach groups.

The Pew Research Centre concluded that YouGov "consistently outperformed" other online competitor samples for accuracy.

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**30m.**  
registered  
panel members

**55+**  
markets



# Assessing the appetite for BF/CM sales



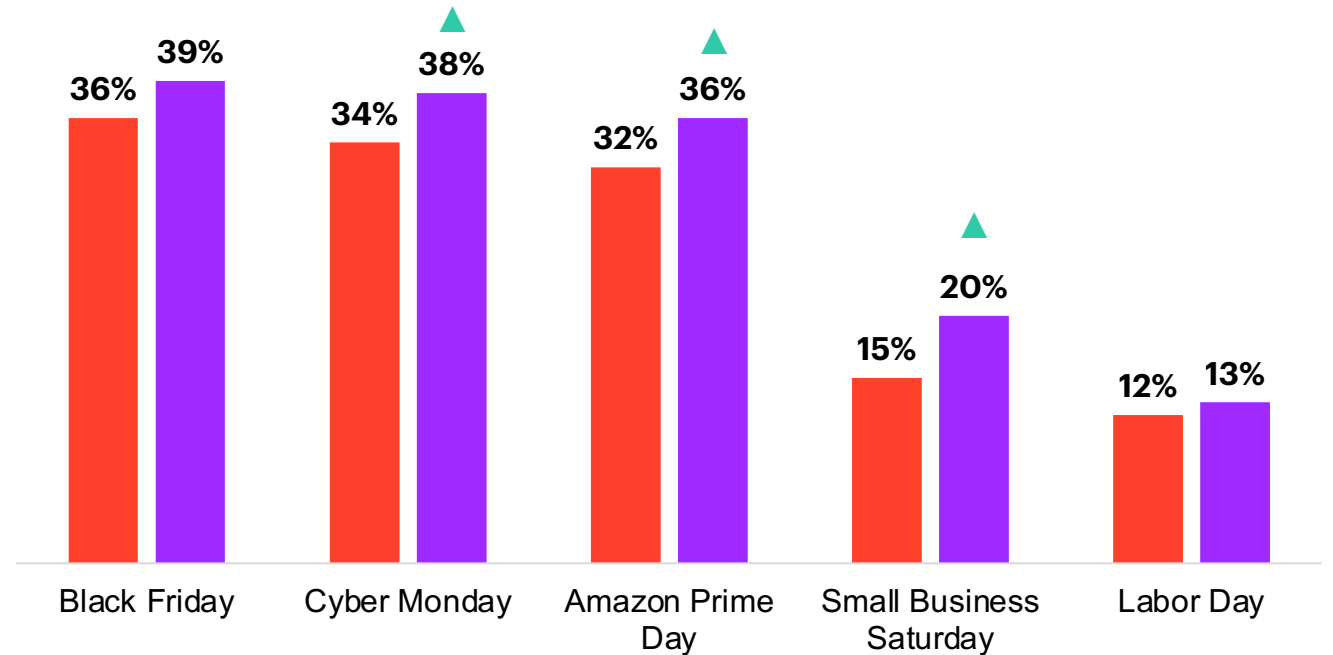
# Participation in BF/CM remains steady in 2025

Those saying they're likely to make purchases has increased by **5%** for Small Business Saturday and **4%** for Cyber Monday and Amazon Prime Day.

## How likely are you to make purchases during the following mega sales events, if any?

US gen pop who answered "somewhat likely" or "very likely"

■ 2024 ■ 2025



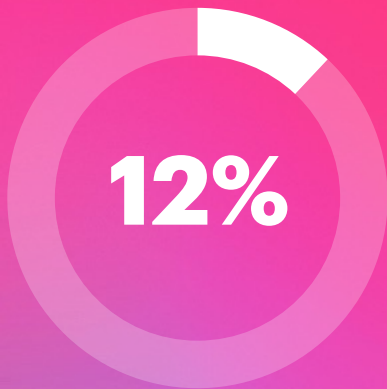
YouGov Surveys: August 8-18, 2025 vs July 12-30, 2024. US gen pop: n> 1,500

▲: indicates statistically significant increase

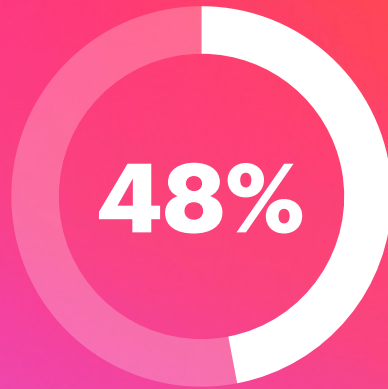


# Though participation is stable, many consumers are losing interest in mega sales events

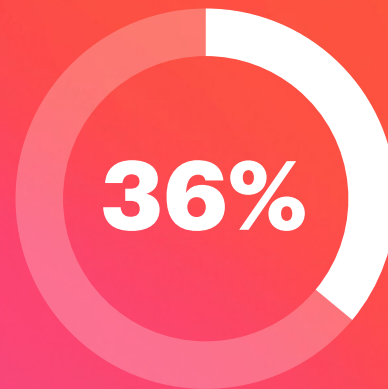
“How has your interest in mega sales events changed, if at all, compared to 2–3 years ago?”



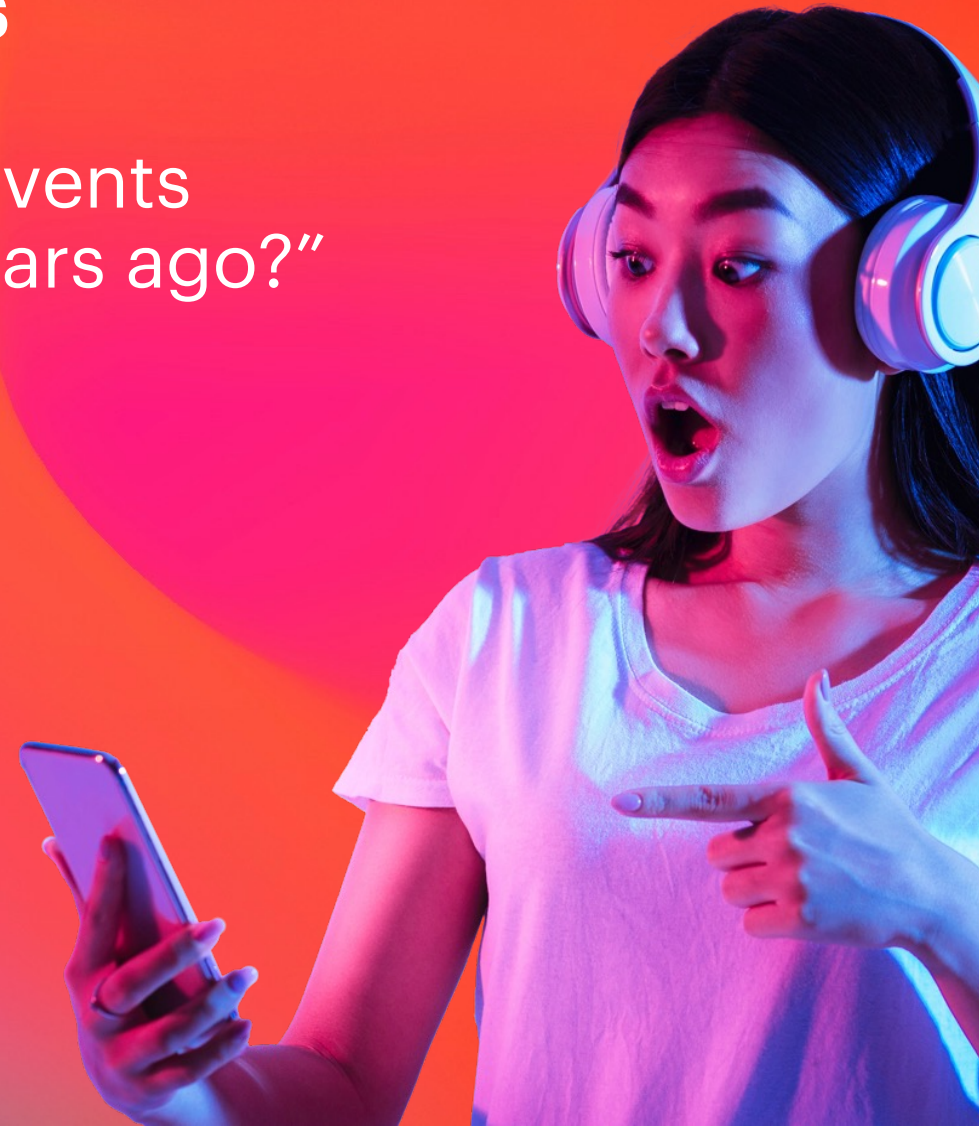
More interested



No change



Less interested



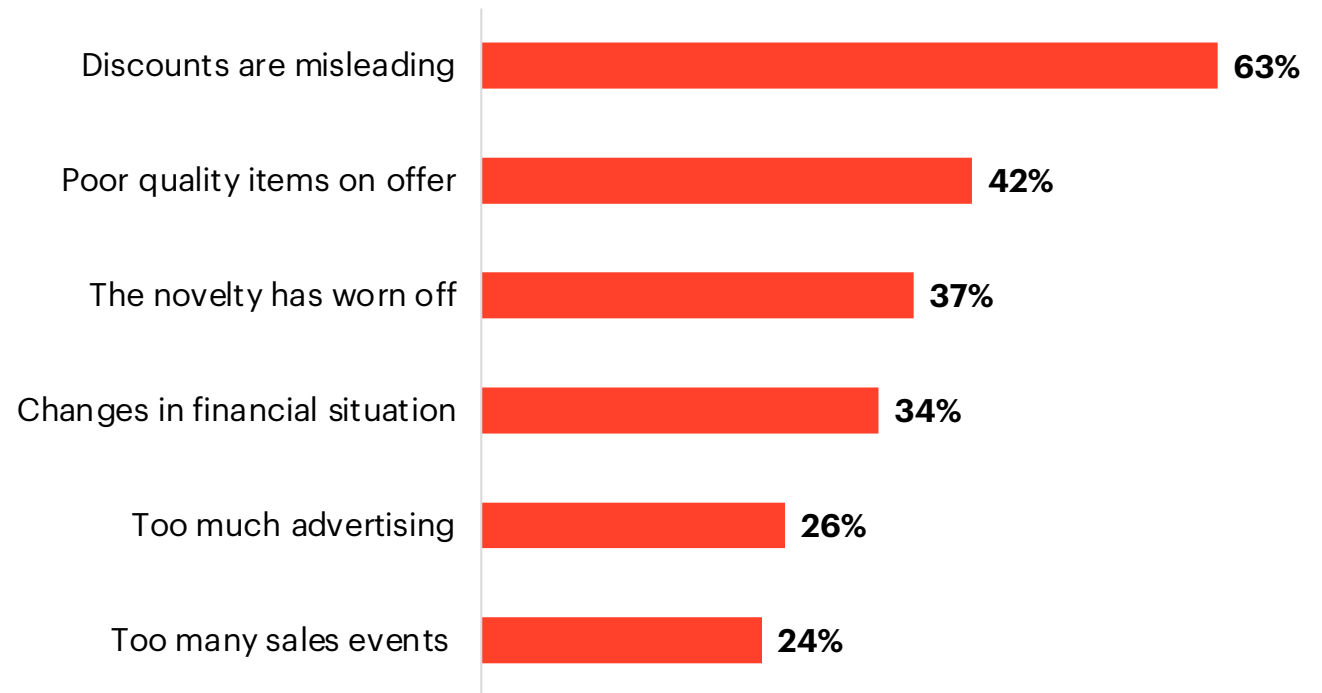


# Misleading discounts and poor-quality items are dampening enthusiasm

Although planned participation in mega sales is stable, **36%** of respondents say they're less interested compared to 2-3 years ago. This compares to only **12%** who say they're more interested. Disillusioned consumers say this is because discounts are misleading (**63%**) and that the quality of items on offer is poor (**42%**).

**Which, if any, of the following are the main reasons that your interest in mega sales events has reduced?  
Please select all that apply.**

■ Americans who are less interested in sales events compared to 2-3 years ago



YouGov Surveys: August 8-18, 2025.

Americans who are less interested in mega sales events compared to 2-3 years ago; n> 500.

Top 6 reasons shown.

# Shopper insights

Younger shoppers lead the way on Black Friday participation with clothing and tech as the top purchase categories.





# A quarter of BF/CM shoppers will spend less than last year

“How much will you spend during mega sale events (e.g., Black Friday, Cyber Monday, and Amazon Prime Day, etc.) this year?”



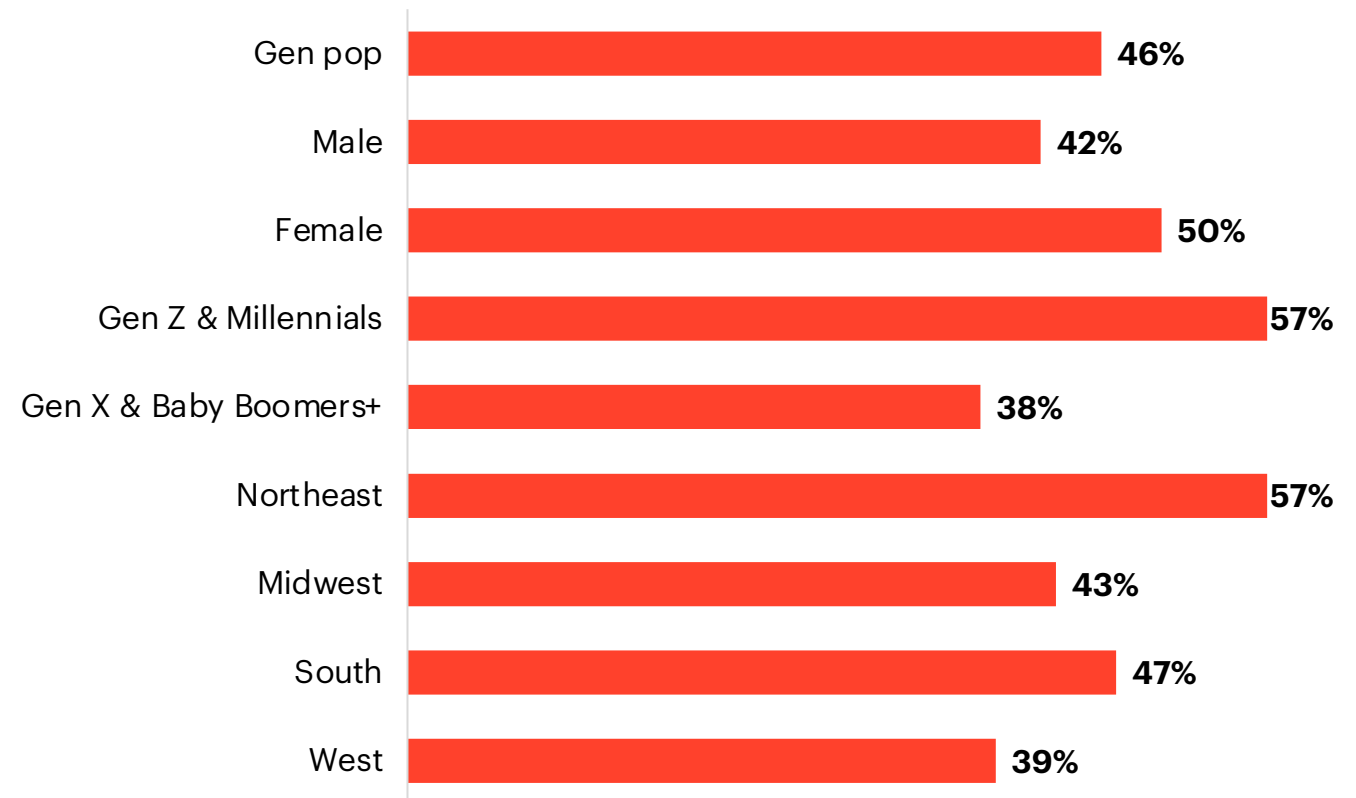
# Gen Z and Millennials more likely to shop BF/CM

BF/CM shoppers skew younger, female and strongly Northeastern. In the Northeast, **57%** of respondents say they'll likely shop at BF/CM compared to **39%** of Westerners.

There are no significant differences between those living in the city, suburbs and rural areas.

## Who will shop BF/CM in 2025?

■ Likely to purchase items in Black Friday/Cyber Monday sales



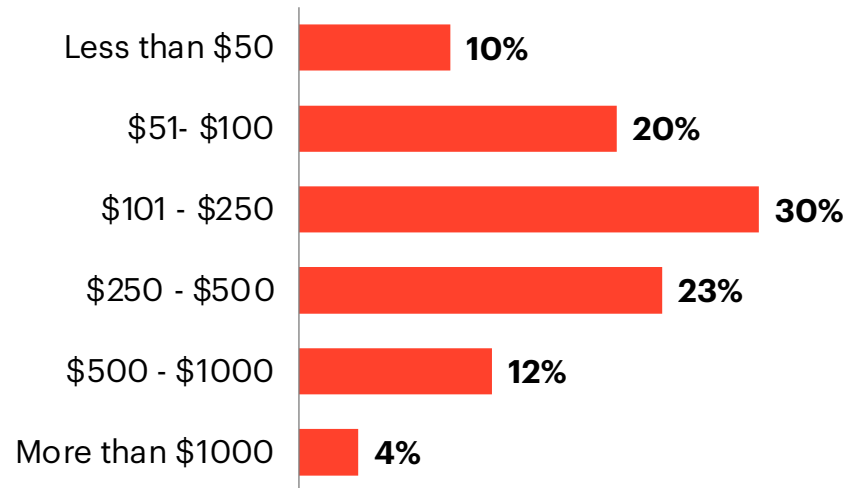
YouGov Surveys: August 8-18, 2025. US gen pop: n> 1,500; Male: n> 650; Female: n> 850  
Gen Z & Millennials: n> 500; Gen X & Baby Boomers+: n> 1,000  
Northeast: n> 250; Midwest: n> 300; South: n> 500; West: n> 300



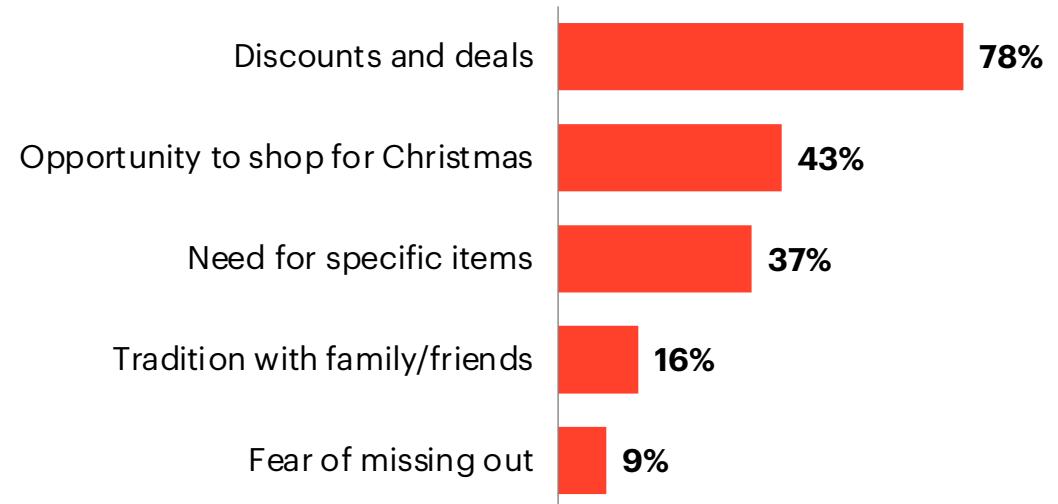
# Most BF/CM shoppers spent between \$100-\$500 last year

Two-fifths of 2024 BF/CM shoppers (**40%**) spent more than \$250, with discounts and deals being the most common motivation for shopping.

## How much did you spend on shopping during the last Black Friday/Cyber Monday?



## What motivated you to shop during Black Friday/Cyber Monday in the last 12 months? Please select all that apply.



# Clothing and tech are top purchase categories

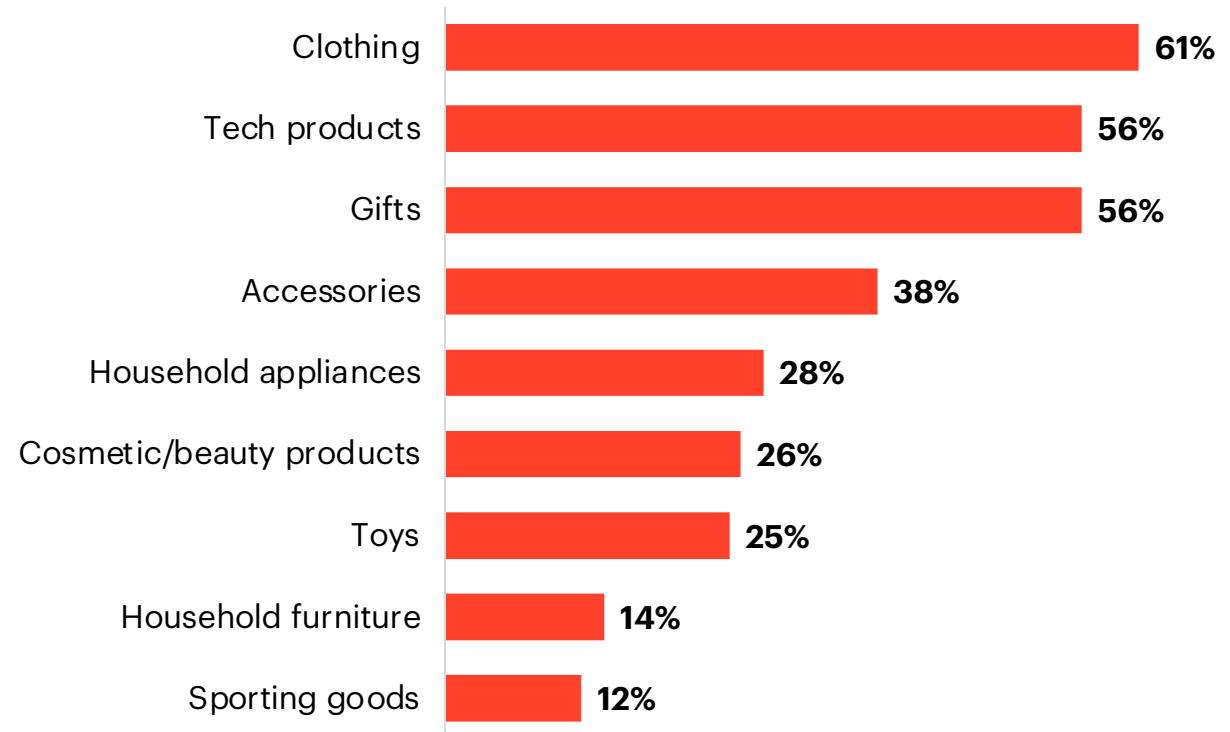
Clothing is the most popular item for purchase during mega sales events (**61%**), followed by tech and gifts (**56%**).

Get in touch for more data

## What do you usually buy during mega sales events?

(Select all that apply)

■ BF/CM shoppers



YouGov Surveys: August 8-18, 2025. US Black Friday/Cyber Monday shoppers: n> 700.  
Top 9 categories shown.

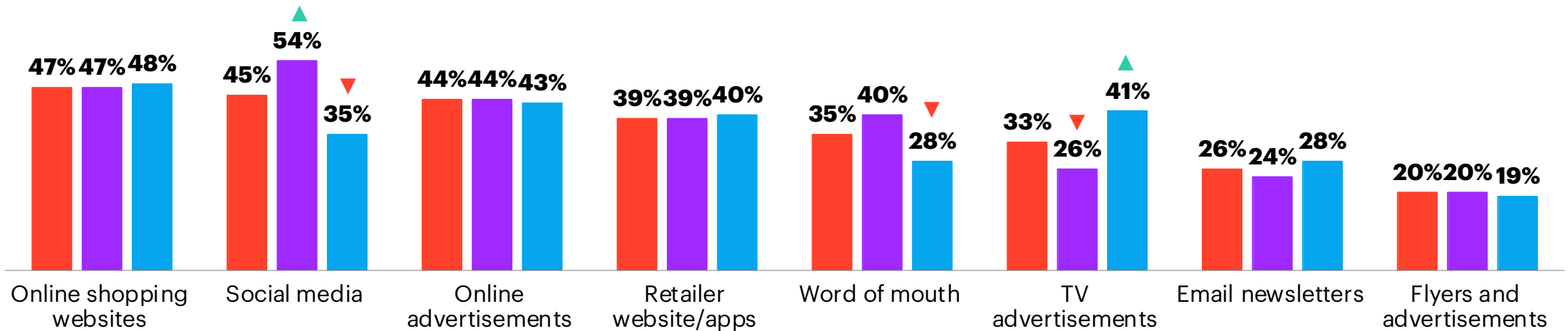


# Online channels are most effective for spreading awareness of mega sales

Social media plays a strong role in driving awareness among Gen Z and Millennials, with 54% stating they are likely to notice mega sale events on this channel, compared to 35% of Gen X and Baby Boomers+.

## Where are you most likely to notice mega sales events such as Black Friday and Cyber Monday?

■ Black Friday/Cyber Monday shoppers ■ Gen Z & Millennials BF/CM shoppers ■ Gen X & Baby Boomers+ BF/CM shoppers



YouGov Surveys: August 8-18, 2025. US Black Friday/Cyber Monday shoppers: n> 700; Gen Z & Millennials: n> 350; Gen X & Baby Boomers+: n> 300.

▲ ▼ indicates statistically significant difference compared to Black Friday/Cyber Monday shoppers.  
Top 8 options shown.

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# Cost of living crunch? Over a third of shoppers hold off on making essential purchases for sales

## 37%

of BF/CM shoppers agree: "I hold off on making an **essential purchase** in the hopes that it will be available in a mega sale event offer."

## 31%

of BF/CM shoppers agree: "I do most of my gift or holiday shopping during mega sale events."

## 29%

of BF/CM shoppers agree: "I hold off on making a **luxury purchase** in the hopes that it will be available in a mega sale event offer."





# Tariffs, mega sales, and overconsumption

Many consumers are shopping earlier and buying American in light of import tariffs.

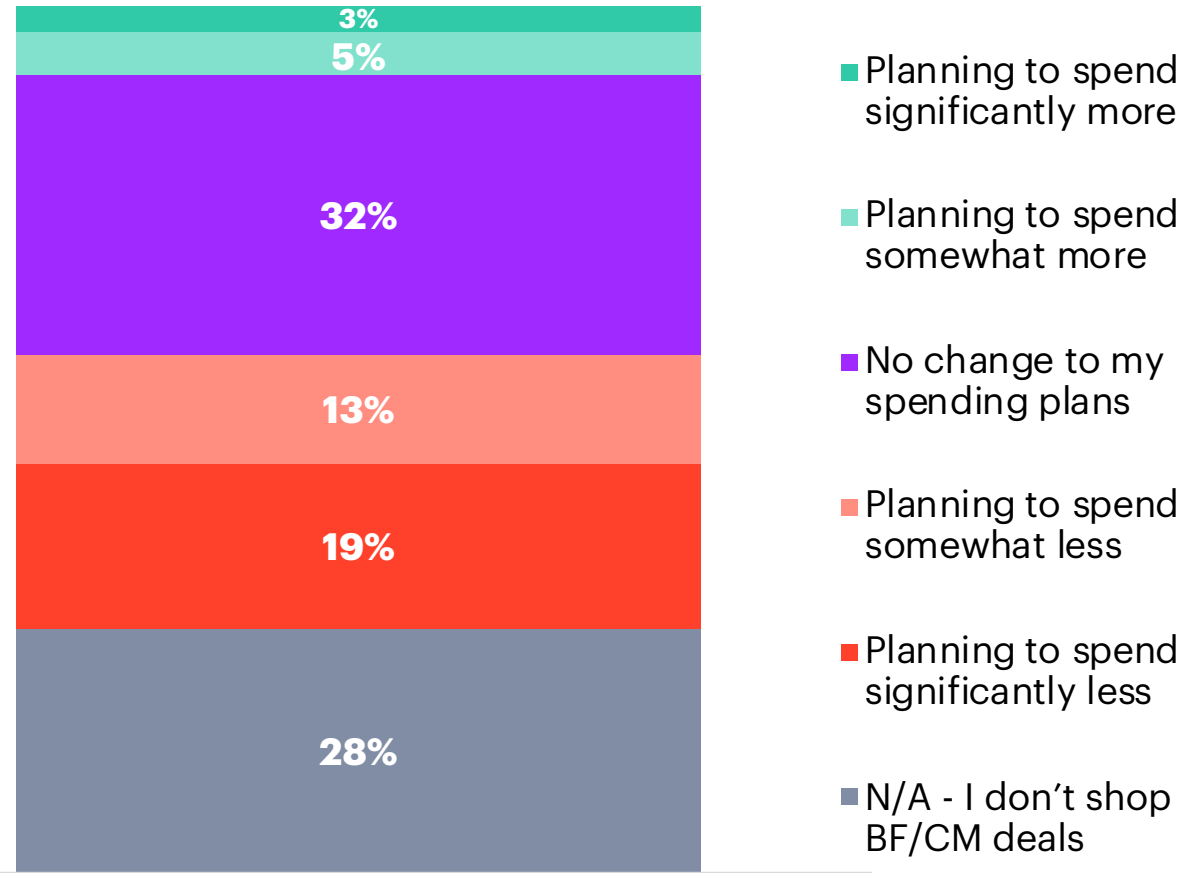


# Tariff impact on spend

When asked about the impact of tariffs, 4x more Americans say they will spend less than more (32% vs 8%)

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## How has the introduction of import tariffs influenced your Black Friday and Cyber Monday spending plans?



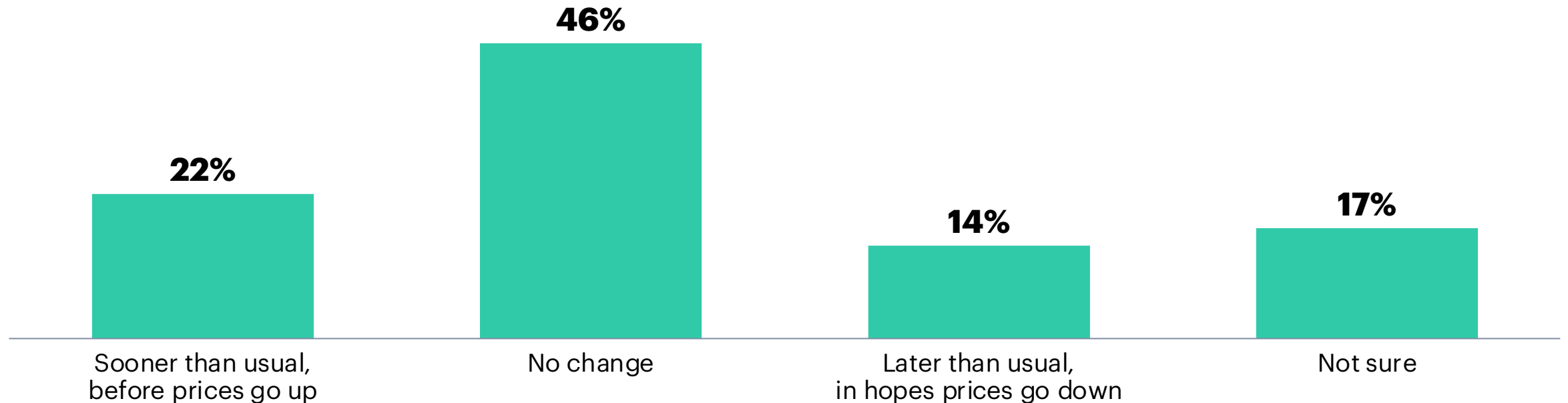
US gen pop

YouGov Surveys: Self-serve. September 15, 2025. US gen pop: n> 1,000.

# 22% of Americans plan to shop sooner than usual this year due to tariffs

**Given the recent introduction of import tariffs, which of these best describes your approach to when you will do holiday shopping this year?**

■ US gen pop



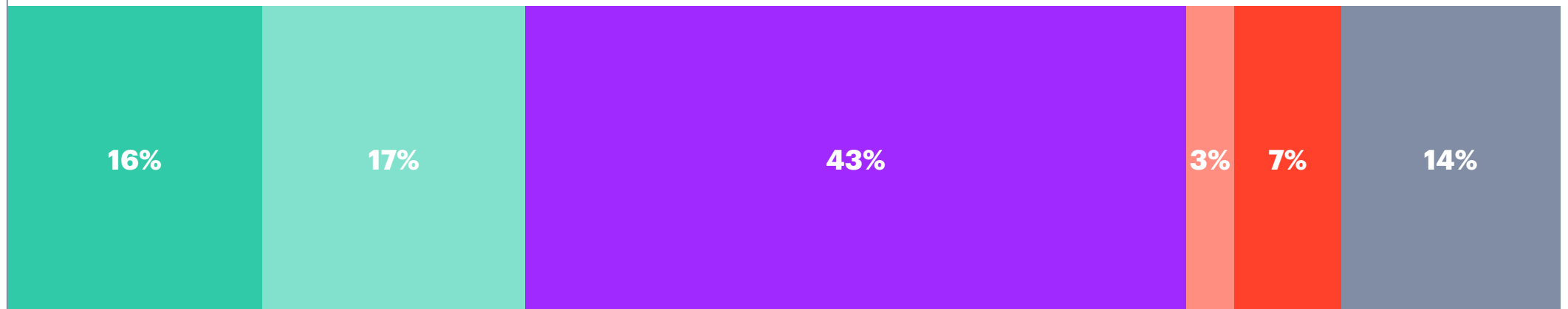


# Nearly a third of Americans are more likely to prioritize "Made in USA" products this holiday season

**Given the recent introduction of import tariffs, how likely are you to prioritize "Made in USA" products this holiday season?**

- Much more likely
- Somewhat more likely
- About the same as always
- Somewhat less likely
- Much less likely
- Don't know

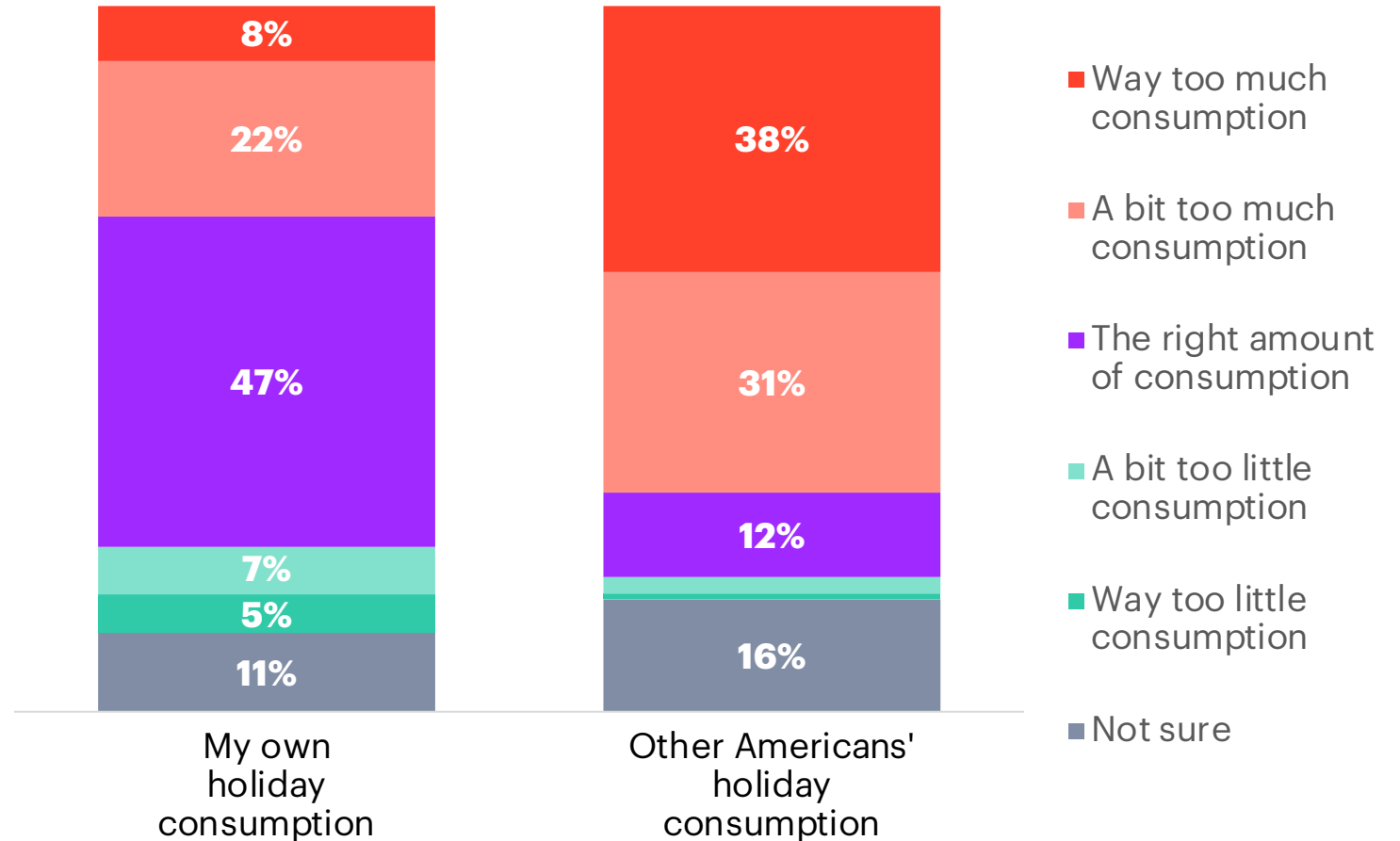
US gen pop



# Americans think *other* Americans consume too much

69% of Americans say other Americans consume too much around the holidays, but only 30% say the same about themselves. On the other hand, 47% say that they consume the right amount but only 12% say the same about other Americans.

## What do you think about how you / other Americans typically purchase and spend around the holidays? (% of US gen pop)



YouGov Surveys: Self-serve. September 15, 2025. US gen pop: n> 1,000.



# AI shopping is not for everyone (yet)

Most Americans are unlikely to use AI to help with mega sale shopping this year, but a significant minority are open to it.



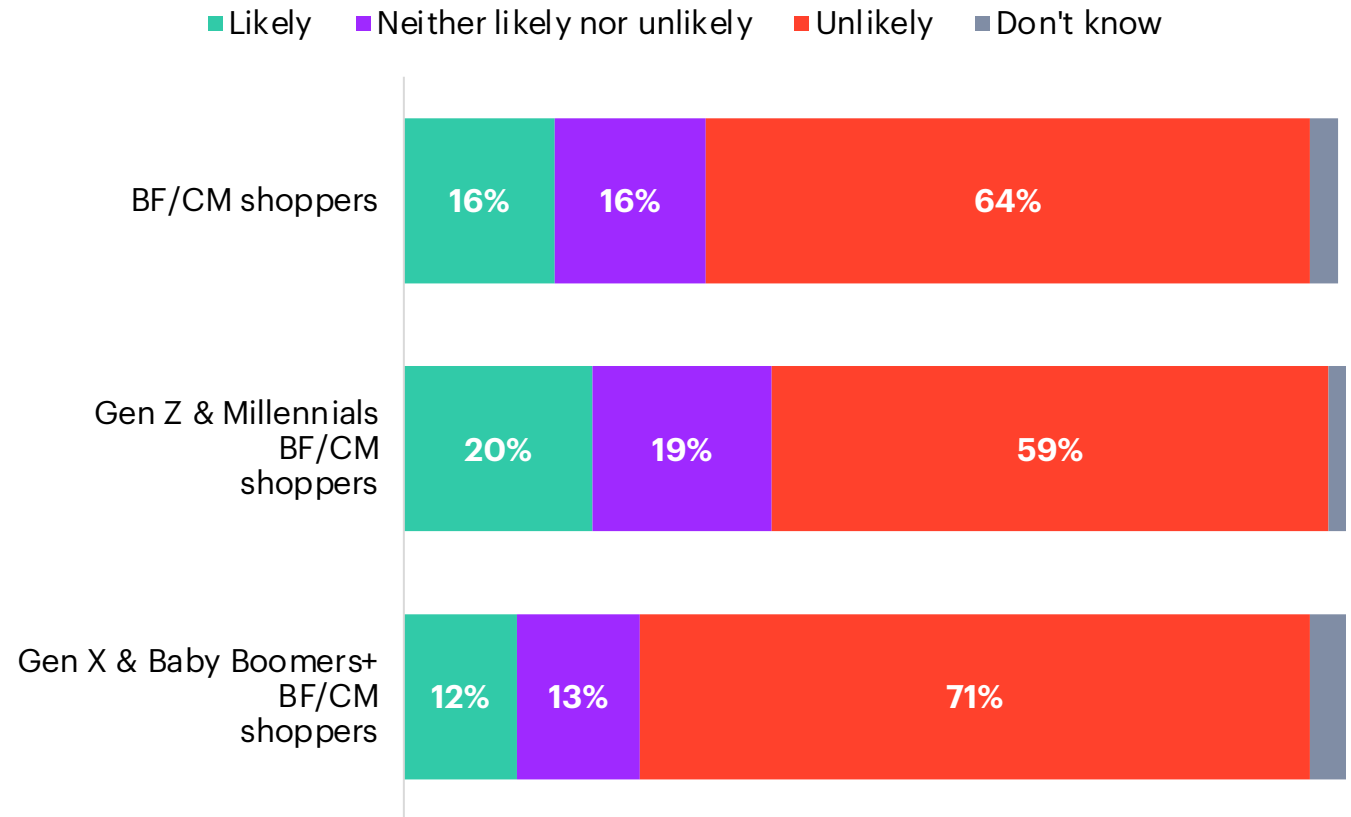
# Not all Americans are ready for AI shopping

Only **16%** of BF/CM shoppers say they're likely to use AI to navigate this year's sales. The majority (**64%**) say they're unlikely to do so.

More Gen Z and Millennial shoppers (**20%**) are likely to use AI than their elders (**12%**) in this year's sales.

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## How likely or unlikely are you to use an AI tool to help navigate mega sales events this year?



YouGov Surveys: August 8-18, 2025. US Black Friday/Cyber Monday shoppers: n> 700;  
Gen Z & Millennial Black Friday/Cyber Monday shoppers: n> 350;  
Gen X & Baby Boomers+ Black Friday/Cyber Monday shoppers: n> 300



# Most BF/CM shoppers won't trust AI with their shopping

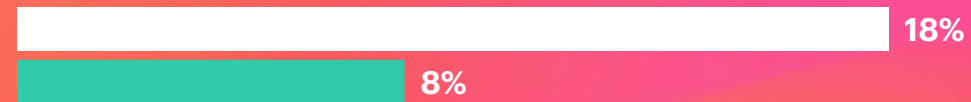
Only **18%** of Gen Z and Millennial BF/CM shoppers would trust AI to find and procure gifts for family and friends. However, this is much more than the **8%** of Gen X and Baby Boomer+ shoppers who would do the same.

One in ten (**11%**) of Gen Z and Millennial BF/CM shoppers wish AI could do all of their holiday shopping.

■ Gen Z & Millennial BF/CM shoppers

■ Gen X & Baby Boomer+ BF/CM shoppers

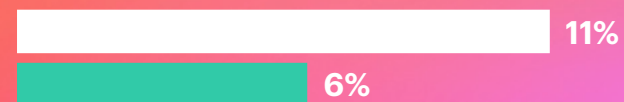
Agree: "I would trust AI to find and procure gifts for family and friends"



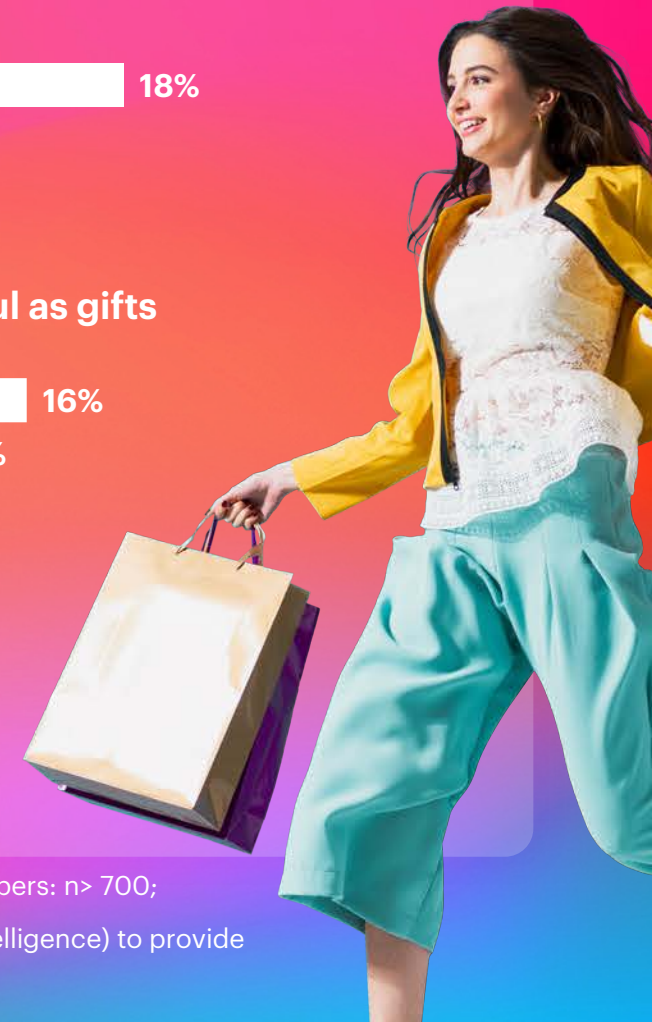
Agree: "AI-selected gifts are as meaningful as gifts I pick out myself"



Agree: "I wish AI could do all of my holiday shopping for me"



YouGov Surveys: August 8-18, 2025. US Black Friday/Cyber Monday shoppers: n> 700; Gen Z & Millennials: n> 350; Gen X & Baby Boomers+: n> 300  
Question: "Which of the following statements about using AI (artificial intelligence) to provide gift recommendations do you agree with? Please select all that apply."

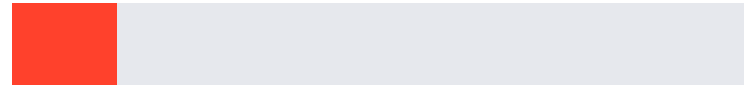


# Younger consumers think differently of AI-chosen gifts

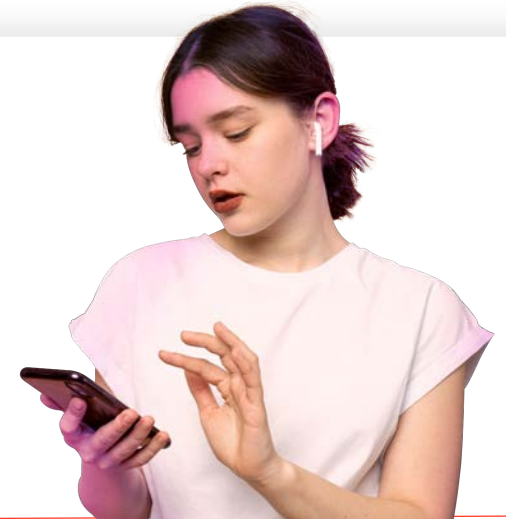
Among BF/CM shoppers, **14%** would change their opinion of someone if they found out that person chose a gift with AI and **18%** would change their opinion of the gift.

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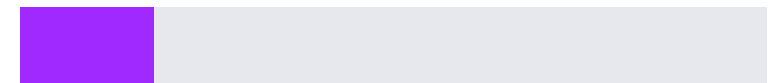
# 14%



Agree: "If I found out someone gave me a gift that AI picked out, it would change my opinion of them."



# 18%



Agree: "If I found out someone gave me a gift that AI picked out, it would change my opinion of the gift. This increases to **25%** among Gen Z & Millennials.



YouGov Surveys: August 8-18, 2025. US Black Friday/Cyber Monday shoppers: n> 700; Gen Z & Millennials: n> 350; Gen X & Baby Boomers+: n> 300  
Question: "Which of the following statements about using AI (artificial intelligence) to provide gift recommendations do you agree with? Please select all that apply."



# Which brands generated the most Buzz during BF/CM 2024?

Ahead of 2025, we look back at the brands that drove the highest Buzz during the month of November last year.





## Top performing fashion retail brands during BF/CM 2024

Rank	Brand name	Buzz score
1	Nike	26.2
2	adidas	22.5
3	Rolex	19.9
4	Skechers	18.8
5	Old Navy	18.5
6	Victoria's Secret	17.1
7	New Balance	16.2
8	Puma	16.2
9	Levi's	15.2
10	Crocs	14.7

YouGov BrandIndex US, November 1 – December 3, 2024, ranked based on net Buzz score. US gen pop: n> 2,100.  
Question: “Over the past two weeks, which of the following brands have you heard something positive / negative about (whether in the news, through advertising, or talking to friends and family)?”

Explore brand tracking



## Top performing retail store brands during BF/CM 2024

Rank	Brand name	Buzz score
1	Walmart	23.9
2	Home Depot	23.8
3	Target	22.0
4	Lowe's	22.0
5	Costco	21.3
6	IKEA	17.7
7	Best Buy	16.6
8	Ace Hardware	15.2
9	Home Goods	14.9
10	Kohl's	13.9

YouGov BrandIndex US, November 1 – December 3, 2024, ranked based on net Buzz score. US gen pop: n> 2,100.  
Question: “Over the past two weeks, which of the following brands have you heard something positive / negative about (whether in the news, through advertising, or talking to friends and family)?”

Explore brand tracking





## Top performing tech & home electronics brands during BF/CM 2024

Rank	Brand name	Buzz score
1	iPhone	33.5
2	Samsung	29.4
3	Apple	29.0
4	LG	21.4
5	Android	21.3
6	Apple Watch	21.1
7	Sony	15.8
8	iPad	15.8
9	HP	15.5
10	Google Pixel	14.8

YouGov BrandIndex US, November 1 – December 3, 2024, ranked based on net Buzz score. US gen pop: n> 1,900.  
Question: “Over the past two weeks, which of the following brands have you heard something positive / negative about (whether in the news, through advertising, or talking to friends and family)?”

Explore brand tracking



## Top performing **skincare, hair & cosmetics** brands during **BF/CM 2024**

Rank	Brand name	Buzz score
1	Dove (Skincare)	28.6
2	Dove (Haircare)	26.0
3	Vaseline	22.0
4	Olay	18.8
5	Nivea	18.1
6	CeraVe	17.2
7	Head & Shoulders	14.5
8	Neutrogena	14.3
9	Sephora	13.5
10	Bath & Body Works	13.3

YouGov BrandIndex US, November 1 – December 3, 2024, ranked based on net Buzz score. US gen pop: n> 1,500.  
Question: “Over the past two weeks, which of the following brands have you heard something positive / negative about (whether in the news, through advertising, or talking to friends and family)?”

[Explore brand tracking](#)



## Top performing **video game brands** during BF/CM 2024

Rank	Brand name	Buzz score
1	Call of Duty	16.8
2	Candy Crush Saga	16.5
3	Super Mario Bros.	14.8
4	Call of Duty: Warzone	14.2
5	MONOPOLY GO!	11.9
6	Minecraft	11.4
7	Mortal Kombat	10.9
8	Grand Theft Auto	9.7
9	EA SPORTS FC	9.6
10	Fortnite	9.3

YouGov BrandIndex US, November 1 – December 3, 2024, ranked based on net Buzz score. US gen pop: n> 1,800.  
Question: “Over the past two weeks, which of the following brands have you heard something positive / negative about (whether in the news, through advertising, or talking to friends and family)?”

[Explore brand tracking](#)



# Methodology

**The insights in this report have been sourced via YouGov Surveys, YouGov Profiles, and YouGov BrandIndex.**

Unless otherwise stated, the insights in this report were sourced via **YouGov Surveys: Serviced** – providing rapid answers from the right audience.

The multi-region survey was conducted from August 8-18, 2025, with 1,536 respondents in USA. Additional insights are available for 16 other markets: Australia, Canada, Denmark, France, Great Britain, Germany, Hong Kong, India, Indonesia, Italy, Mexico, Poland, Singapore, Spain, Sweden, and the UAE.

Throughout the report, each generation is defined as: Gen Z (1997-2007), Millennial (1981-1996), Gen X (1965-1980) and Baby Boomers+ (Before 1964). **Black Friday/Cyber Monday (BF/CM) shoppers** are defined as those who answered with “Somewhat likely” & “Very likely” to the question: “How likely are you to make purchases during Black Friday OR Cyber Monday?” Year-over-year change in the likelihood to purchase during Mega Sales events is based on surveys conducted between August 8-18, 2025, and July 12–July 30, 2024.

The profile deep dive in this report was powered by **YouGov Profiles** – an ever-growing source of consumer data, with 2+ million data variables from YouGov’s 30 million global panelists. The data used in this report was accessed via Profiles+ USA 2025-08-17.

The survey questions about the impact of tariffs on BF/CM were asked on September 15, 2025, to 1,000 US consumers via **YouGov Surveys: Self-serve**.

Buzz ranking was analyzed using **YouGov BrandIndex**. YouGov BrandIndex collects data on thousands of brands every day. Buzz scores are based on respondents’ answers to the following question: “Over the past two weeks, which of the following brands have you heard something positive / negative about (whether in the news, through advertising, or talking to friends and family)?” Scores can range from -100 to +100. Buzz rankings are defined by a brand’s positive Buzz score minus its negative Buzz score during the period of analysis. A minimum base size (n) of 300 is required to rank.

# Activate the audiences who matter

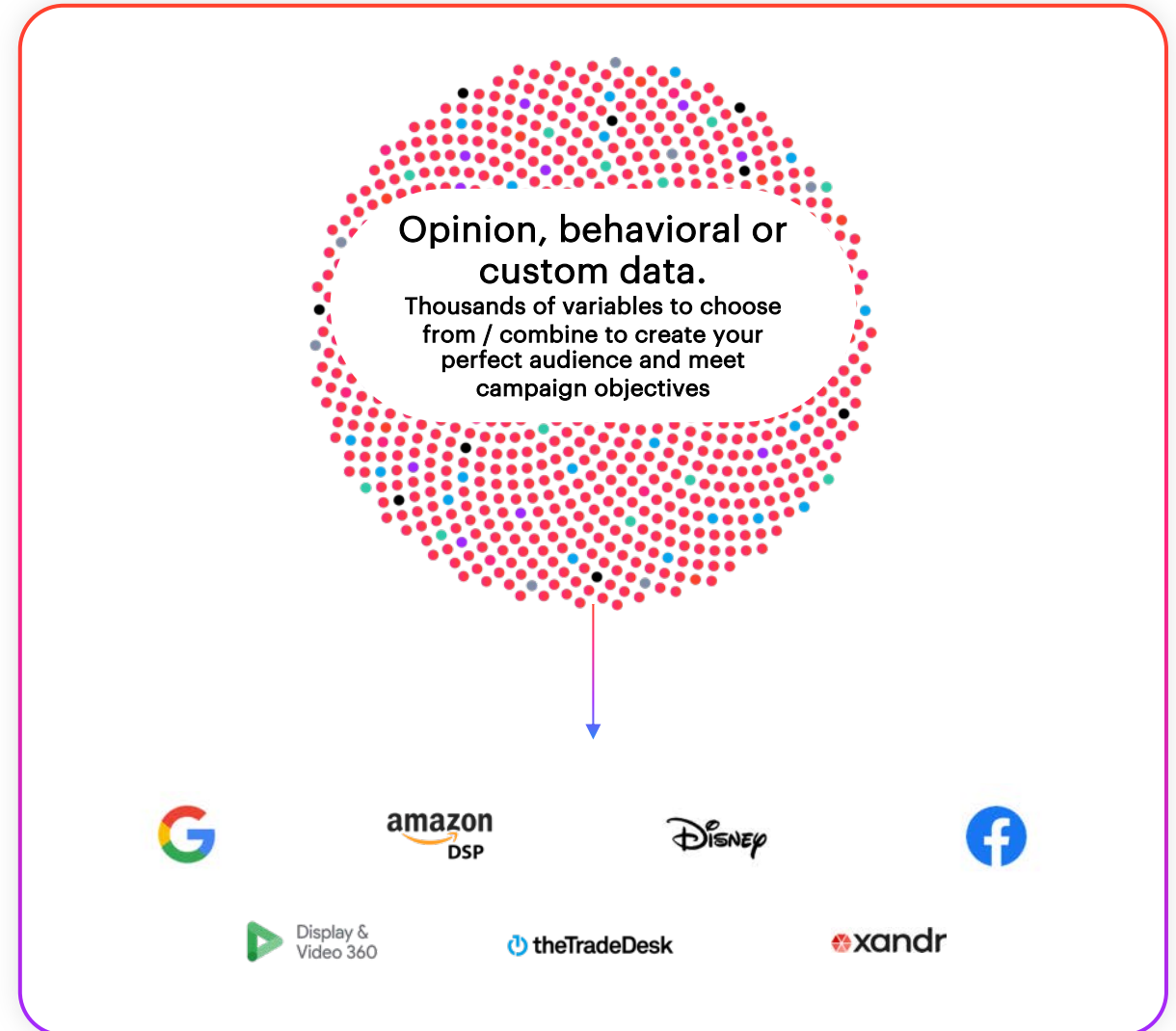
## Defined your perfect audience, then reach them with YouGov Activation

Once you've defined your audience, the real work starts - reaching them when and where it matters.

With YouGov, your audiences are built from real people and real behaviors - whether that's families seeking sustainable but affordable products, or high-income shoppers looking for luxury.

We help you activate those segments across platforms like Meta, Amazon, Google and more. That means your campaigns reach exactly the right people - from awareness to consideration to conversion.

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# Thank you

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