NIQ Perspectives

December 23rd, 2025

"US eCommerce delivered strong performance during Holiday 2025, driven by early shopping and value-conscious behavior. Consumers increasingly purchased before Thanksgiving and favored lower-priced items, yet overall spending continued to rise. This shift creates a challenging landscape for direct-to-consumer brands and category specialists, which are losing share to dominant platforms like Amazon and omnichannel retailers with advanced fulfillment capabilities. Extended promotional periods are now a permanent feature of holiday strategy. Brands and retailers must plan for earlier engagement, competitive pricing, and resource allocation toward platforms and models that capture the majority of online growth."

Jack O'Leary

Director, eCom Insights, NielsenIQ

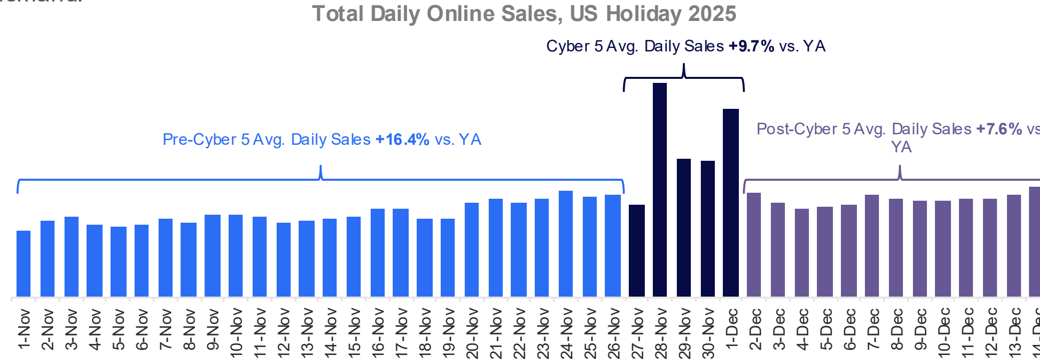
Holiday Online Sales Up 13%: Early Shopping and Value Focus Reshape Retail Playbook

Extended Promotions and Cautious Gifting Are Redefining the Holiday Shopping Period

Pre-Cyber 5 Emerges as Growth Engine, Outperforming in YoY Gains

Holiday 2025 was anchored by Cyber 5, the five-day period from Thanksgiving through Cyber Monday that traditionally marks the most promotional stretch of the season. Black Friday led as the single largest online sales day, with Cyber Monday close behind. However, the most significant year-over-year growth occurred before Cyber 5, where early promotional activity drove a 16.4 percent surge in average daily sales compared to 2024. This shift underscores a structural change: extended deal windows and early shopper engagement are now critical growth levers. Retailers that fail to front load promotions risk losing share to competitors who capitalize on early demand.

Total Daily Online Sales, US Holiday 2025



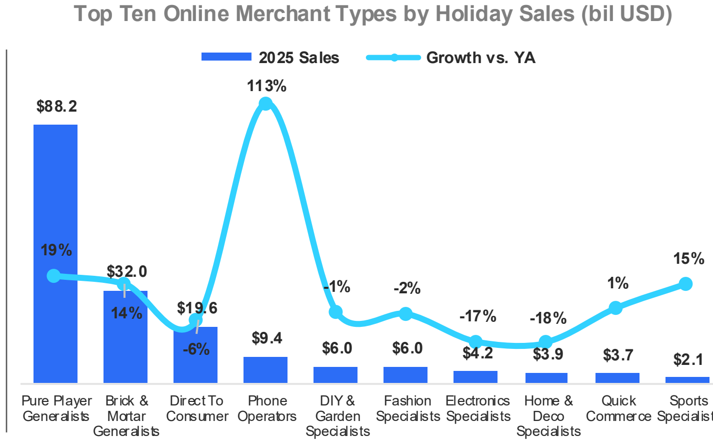
Category Leaders: Apparel and Electronics Drive Growth While Pure Players Dominate Volume

Gifting categories led by apparel and consumer electronics dominate the top ten product types for Holiday 2025. Platforms such as Amazon, classified as pure players, remain the most powerful eCommerce model, growing 19 percent year over year. Their combination of vast assortment, rapid delivery, and aggressive promotional positioning makes them the preferred destination for gifting missions. For brands, this reinforces the need to optimize presence and competitiveness on these platforms to capture holiday spending.

Top Ten Product Types, Holiday 2025

1. Video Games
2. Sweaters, Sweatshirts, Hoodies
3. Headphones & Microphones
4. Laptops & Netbooks
5. Mobile Phones
6. Pants
7. Jackets & Coats
8. Dog Food & Treats
9. Tops & Tees
10. Tablets

Top Ten Online Merchant Types by Holiday Sales (bil USD)



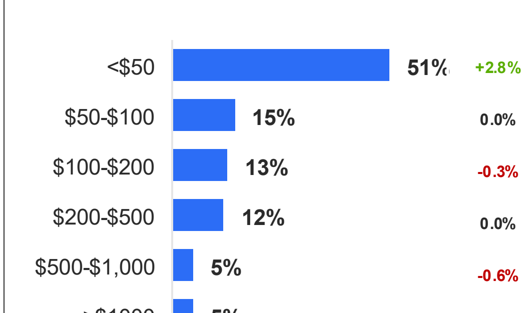
Holiday Gifting Trends Shift Toward Lower-Priced Items

Holiday 2025 baskets and order values grew only modestly compared to 2024, while average item price declined slightly despite inflationary pressures and tariffs. Products priced under $50 now account for 51 percent of total sales, gaining 2.8 points of share year over year. This growth came at the expense of higher-priced items, particularly those above $1,000, which lost 1.9 points of share. Consumers did not retreat from online shopping but demonstrated value-conscious behavior, favoring affordable gifts over premium purchases. For brands and retailers, this signals the need to prioritize entry-level price points and compelling value propositions for this period.

Holiday 2025 vs. 2024: Basket Dynamics

Avg.	Holiday 2025	Holiday 2024
Items per Order	2.4	2.3
Order Value	$68.20	$66.70
Item Price	$28.50	$29.10

Holiday Share of Sales by Item Price, Chg. Vs. YA



Source: NIQ – Digital Purchases, 12.23.24, Holiday defined as Nov. 1 to Dec. 14 (latest available data)

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