BFCM HOLIDAY GROWTH EBOOK 2025

Scaling Ecommerce for the Holidays

NATIONAL POSITIONS
PROFITABLE INTERNET MARKETING

Introduction

Black Friday–Cyber Monday (BFCM) 2025 won't look like years past. Rising costs, shifting consumer behaviors, and AI-powered discovery are rewriting the playbook. This ebook distills learnings from last year, Q1 2025 trends, and our recent Holiday Growth Masterclass into a practical guide. Each section includes insights, a checklist of action steps, and a conclusion to tie the insights together.

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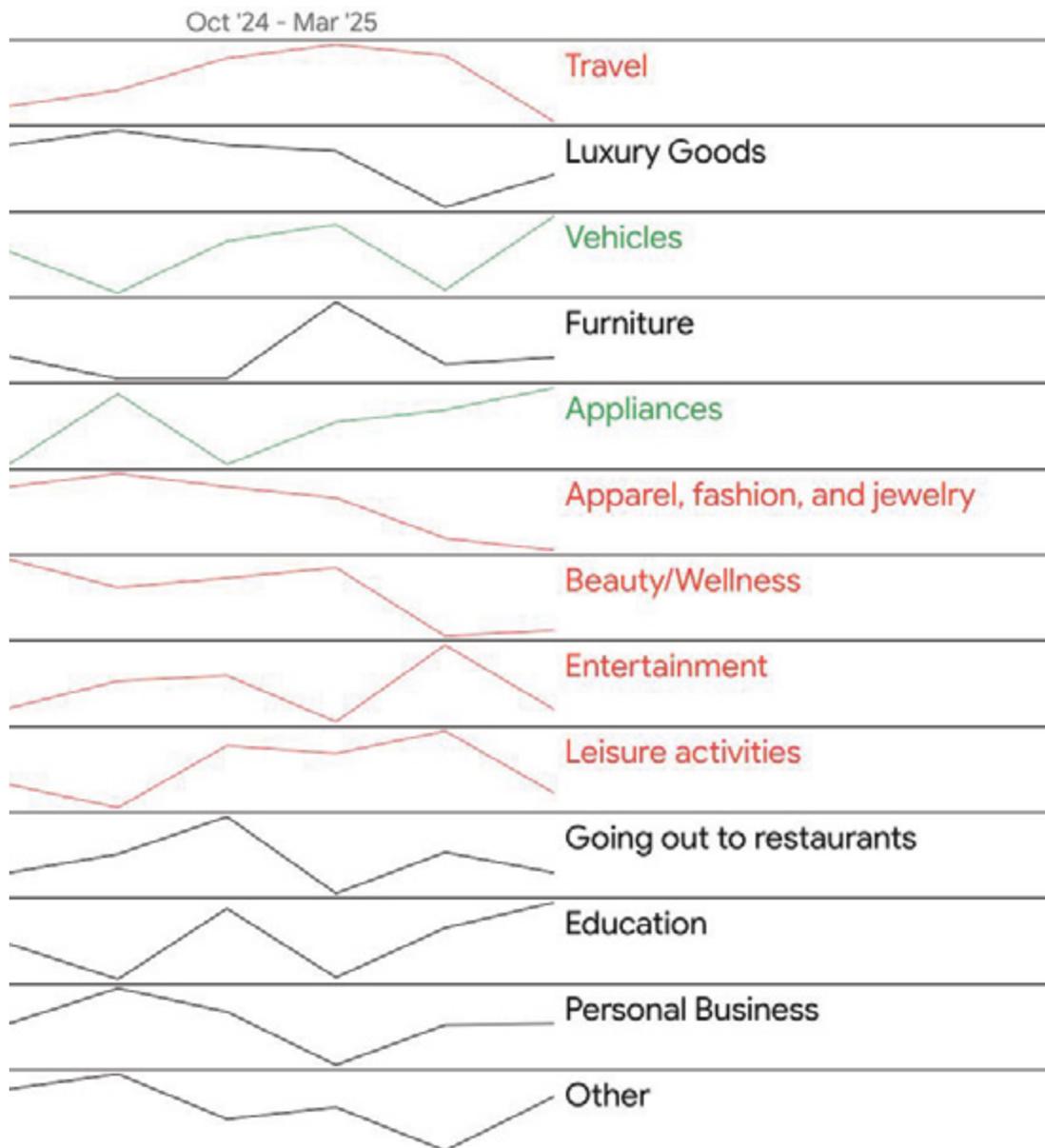- Holiday preparation

Economy:
Shoppers Are Cautious but Capable

Consumers remain financially stable, but confidence has dipped and inflation expectations are climbing. The difference this year is not ability but willingness—shoppers are more selective. Experiences (travel, entertainment, wellness) are competing with traditional product categories for holiday spend.

Retail's competitive set has expanded as shoppers realign spending priorities

"Thinking about the next 3 months, which of the following non-essential categories will you prioritize spending on?"

Oct '24 - Mar '25

- Travel
- Luxury Goods
- Vehicles
- Furniture
- Appliances
- Apparel, fashion, and jewelry
- Beauty/Wellness
- Entertainment
- Leisure activities
- Going out to restaurants
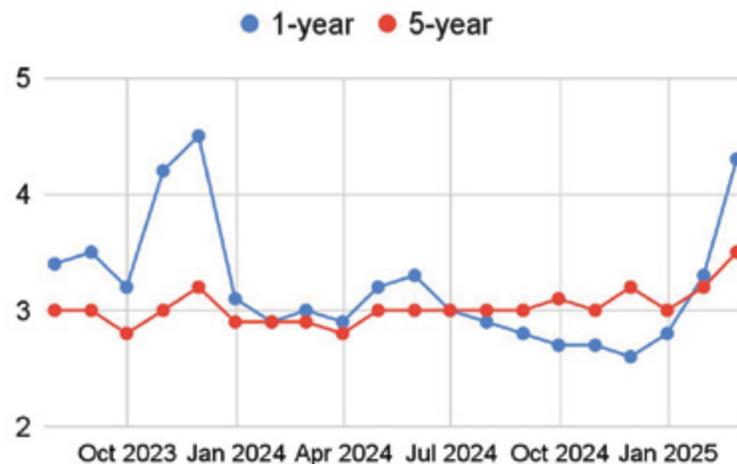- Education
- Personal Business
- Other

Source: Google / Material, Fresh Insights Tracker, Q1 2025 (Base: US General Population, n=600)

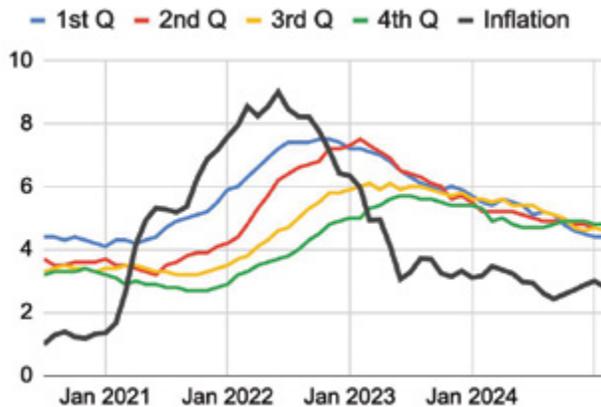# US consumer confidence down, inflation expectations up

Consumer confidence
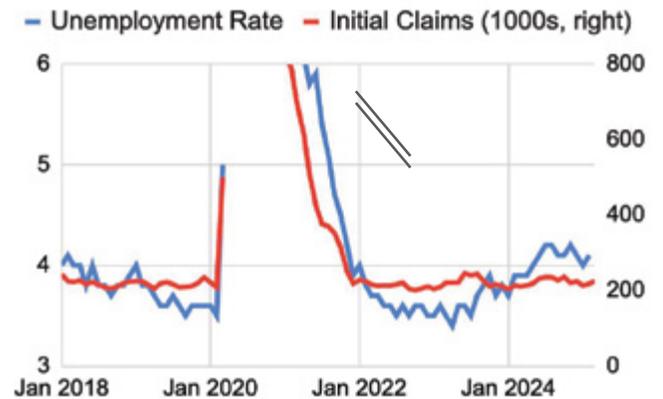

Inflation expectations

Source: Google / Matsonx Fresh Insights Tracker, 2025 (based on US General Population, n≈500)

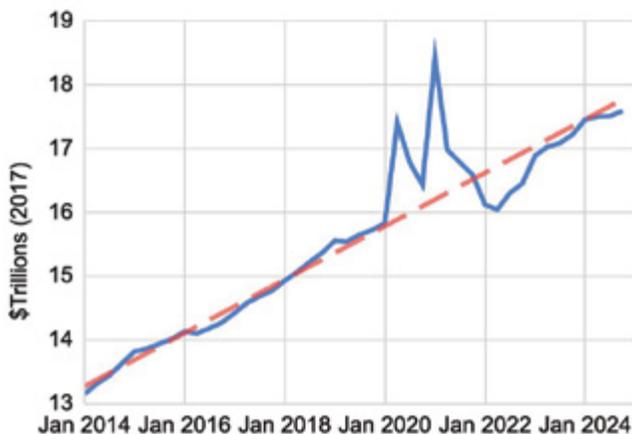# Some comfort: US consumers remain on solid ground

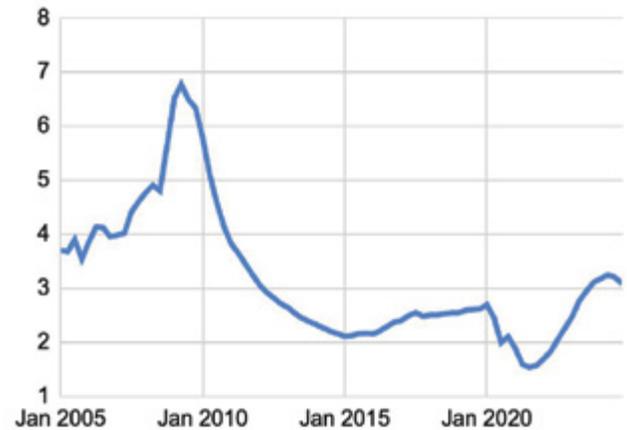### Wage growth by quartile

US Unemployment

Real Disposable Income

Credit Card Delinquency

Source: Google / Material, Fresh Insights Tracker, Q1 2025 (Base: US General Population, n=600)

US consumers are currently unwilling rather than unable to spend

Action Items

☑ Position products as part of a larger experience (bundles, unboxing, emotional value).

☑ Focus messaging on value, meaning, and utility—not just discounts.

☑ Capture early demand in October before competition peaks.

Conclusion

Consumers can spend, but they need compelling reasons. Retailers that connect with emotional value, emphasize experiences, and act early in Q4 will have the strongest advantage.

Learnings from Last Year & Q1 2025

The easy gains are gone. In 2023, BFCM growth was explosive. By 2024, efficiency slowed, CPAs and CPMs tripled vs. 2022, and ROAS flattened. Q1 2025 reinforced the trend: spend was higher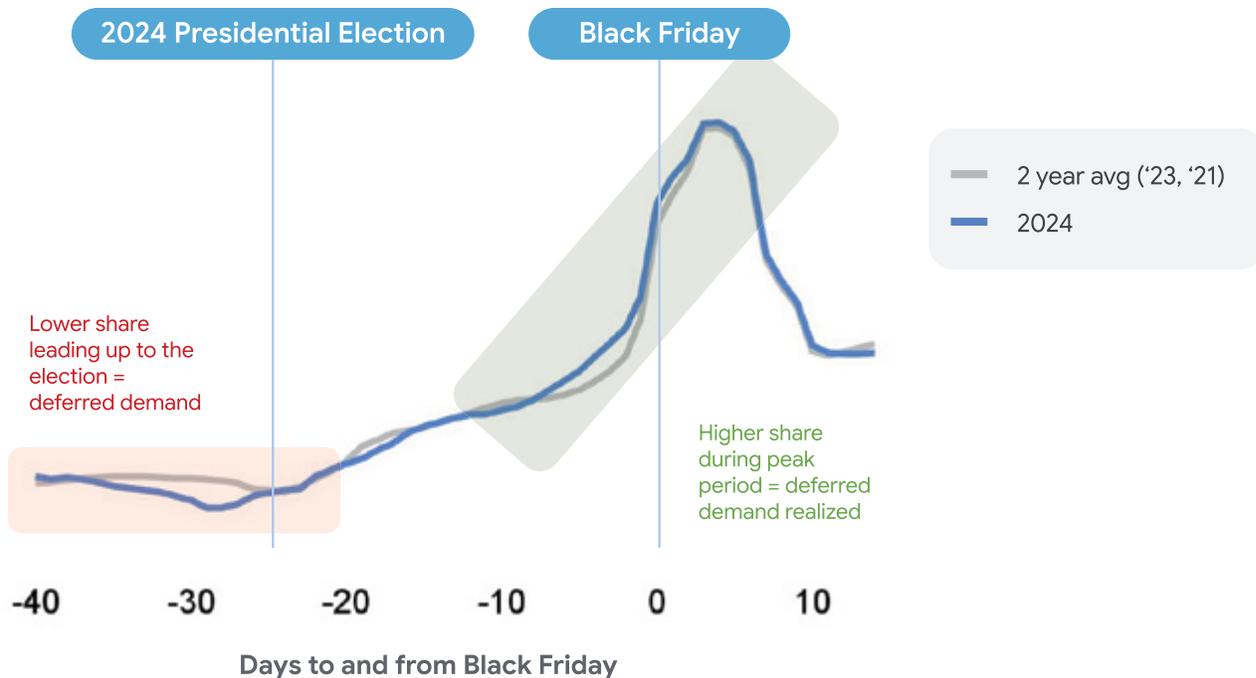, returns were weaker, and new customer revenue dropped. TikTok matured (+49% ROAS, +35% AOV growth) while Meta dominated spend.

Condensed holiday season returns with early Q4 upside

Rolling 7d Seasonal Trend
(Branded Apparel)

2024 Presidential Election

Black Friday

2 year avg ('23, '21)

2024

Lower share leading up to the election = deferred demand

Higher share during peak period = deferred demand realized

-40   -30   -20   -10   0   10

Days to and from Black Friday

Source: Google Internal Data.

A late Thanksgiving again drives a condensed shopping season, nearly identical to 2024. In 2024, we saw 5 fewer shopping days post-Cyber vs. 2023.

October & early November will hold significant upside compared to last year that was impacted by the the Presidential Election.

Comparing BFCM 2023 vs. 2024

Spend up, efficiency down

- 2023: Spend +47.6%, Conversion +58%

- 2024: Spend +26.3%, Conversion +27.5% → Efficiency gains slowing

Ad costs rising

- 2CPA: +3.1% (2023) → +10.4% (2024)

- CPM: +3.6% (2023) → +12.4% (2024) → Costs nearly tripled since 2022

ROAS plateauing

- +5.3% in 2023 → only +0.5% in 2024

New customer revenue declining

- -3.1% (2023) → -27% (2024) → Acquisition harder, focus shifting to existing customers

AOV increasing

- +5% (2023) → +7.6% (2024) → Higher cart values driving growth

Metric	% Change BFCM 2023	% Change BFCM 2024
Spend	+47.61%	+26.28%
Conversion Value	+58.09%	+27.51%
Median CPA	+3.09%	+10.38%
Median CPM	+3.58%	+12.42%
Median ROAS	+5.32%	+0.53%
Median AOV	+4.97%	+7.61%

Source: TripleWhale

What can I learn from Q1?

Spending more, getting less

Not as easy to acquire customers

The percent of revenue from new customers dropped from 57.16% to 51.79% (-9.39%)

New customer order percentage declined from 54.27% to 48.36%

AOV decreased by -2.73% ($93.65 to $91.10)

Metric	% Change
Spend	+27.24%
Clicks	+19.96%
Impressions	+11.48%
Purchases	+12.17%
Conversion Value	+20.22%
Median CPA	+11.70%
Median CPM	+14.84%
Median CVR	+1.04%
Median CTR	+5.53%
Median MER	+6.25%
Median ROAS	-4.19%
Total Order Revenue	+19.14%
New Customer Order Revenue	+7.95%
% Revenue from New Customers	-9.39%
Average Order Value (AOV)	-2.73%

Source: TripleWhale

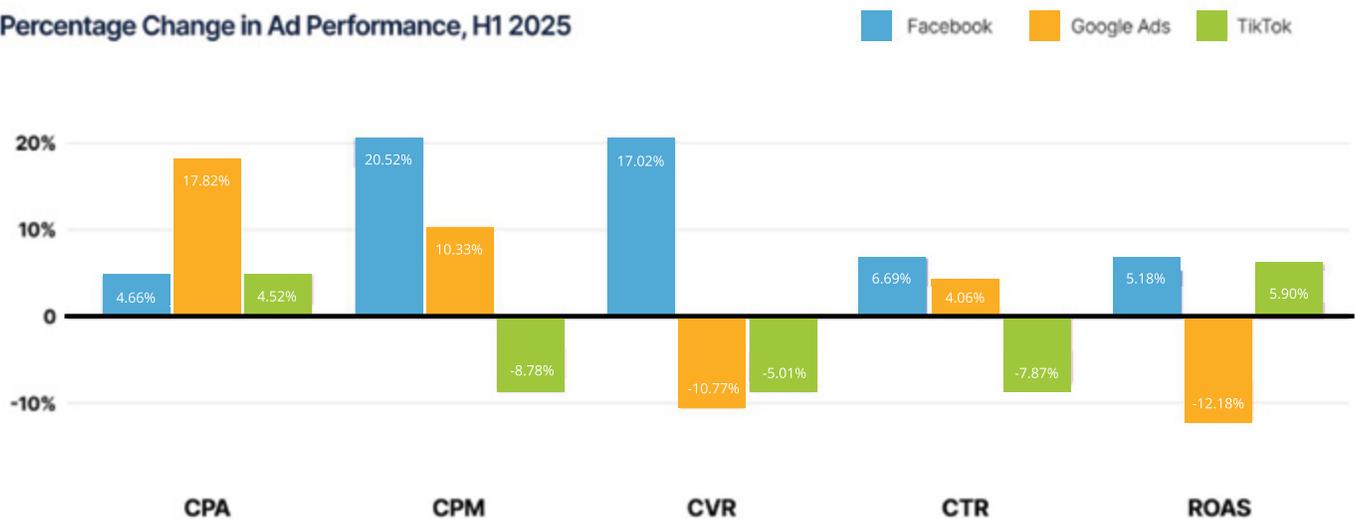# Learnings 2024 vs. 2025 so far

What Worked for BFCM 2024

- 59.71% of revenue from new customers

- TikTok matured → +49.24% ROAS, +34.87% AOV growth

- Meta dominated → 67.81% of all ad spend

2025 Looks Different

- **51.79% of revenue** from new customers (down from 59.71%)

- **Acquisition harder & more expensive** than ever

- **Cross-platform nurturing** makes retention easier

- **Better ROI on existing customers** → more spend on what works

Which channels should I invest in? 2024 vs. 2025

Percentage Change in Ad Performance, H1 2025

Legend: Facebook, Google Ads, TikTok

Metric	Facebook	Google Ads	TikTok
CPA	4.66%	17.82%	4.52%
CPM	20.52%	10.33%	-8.78%
CVR	17.02%	-10.77%	-5.01%
CTR	6.69%	4.06%	-7.87%
ROAS	5.18%	-12.18%	5.90%

Source: TripleWhale

* TripleWhale blog post: TikTok ROAS was up +46.24%, AOV increased by +34.87% triplewhale.com

Learnings for the Holidays

Retention = Growth

- Existing customers drive ~50% of revenue*
- Invest in loyalty, VIP, early access
- Personalize offers with zero-party data

Acquisition = Premium Focus

- CPA +11.7% → only high-LTV is profitable
- Target lookalikes of best customers
- Raise AOV thresholds, use longer attribution

AOV Decline = Smart Bundling

- AOV down -2.7% → price sensitivity rising
- Bundle to lift cart size
- Use dynamic pricing + post-purchase upsells

LTV = Critical Metric

- Rising CAC → measure over 6–12 months
- Focus on high-repeat categories
- Build advanced retention workflows

* Omniconvert blog: After 24 months, 50 % of the revenue is generated by returning customers Omniconvert

Action Items

- [x] Invest in loyalty, VIP, and win-back campaigns.

- [x] Target lookalikes of high-LTV customers.

- [x] Bundle products to increase AOV and offset rising CPAs.

Conclusion

Efficiency is no longer automatic. Growth will come from smarter acquisition and maximizing retention and lifetime value.

Redefining Discovery & Optimization

AI is transforming both how shoppers discover products and how brands operate. Consumers are now asking ChatGPT, Gemini, or Perplexity for gift recommendations—often before visiting Google or Amazon. Queries are longer and more specific, creating new opportunities for optimized product content. Meanwhile, AI Agents monitor ROAS, inventory, pricing, and competitor promotions in real time.

Leading with innovation and the power of AI

Specifically designed to engage users earlier and provide comprehensive answers to encourage shopping

LLM Search

Shoppers turn to LLMs for gift advice

▶ This holiday season, shoppers are increasingly turning to LLMs like ChatGPT, Gemini, and Perplexity to discover and compare gift ideas instead of relying solely on Google or Amazon search.

AI Overviews

Find information quickly for complex questions

▶ AI Overviews reached over 2B monthly users across more than 200 countries and territories and 40 languages.

▶ AI Overviews brings generative AI to more people than any other product in the world.

AI Mode

Get help with your toughest questions

▶ People are using AI Mode to learn, explore or dig deeper by asking open-ended and follow-up questions.

▶ Early testers of AI Mode are asking much longer queries, 2–3 times the length of traditional searches.*

* Azoma.ai insights: Searches are consistently 2-3 times longer than traditional Google queries azoma.ai

AI Mode is changing the game for shopping

How can AI Agents streamline decisions & maximize ROI?

Examples of AI Agents for BFCM

Performance Tracking

Monitor spend, MER, ROAS, revenue, LTV, anomalies

Forecasting & Planning

Daily revenue, pacing, inventory, seasonal patterns

Creative Optimization

Identify winning ads, analyze competitors, fuel new concepts

Customer Insights

Behavior, retention, lifetime value, campaign reallocations

Inventory Optimization

Predicts stock-outs, models demand by channel, and adjusts bids to match supply.

Competitor Insights

Track competitor promotions, and ad strategies to spot gaps and opportunities

Actionable Alerts

Real-time recommendations to scale, optimize, pause

Pricing Optimization

Adjusts pricing dynamically based on competitor moves, demand elasticity, and margin targets.

Generative AI is supercharging nearly every part of the creative process and enabling next-level impact

Should we be worried about AI Best Deal Finders?

Why it Matters

▶ E-shoppers benchmark prices instantly across Amazon, Walmart, Target, eBay, and brand sites.

▶ The "best deal" directly impacts conversion, margin protection, and customer retention—especially during BFCM.

Leaders in the Space

▶ **Phia** – AI-native tool for real-time price benchmarking across 40,000+ retailers and resale platforms, showing "high / fair / typical" values.

▶ **Keepa** – Deep Amazon price history and alerts for drops or volatility.

▶ **Honey (PayPal Honey)** – Applies best coupons automatically and tracks price drops via Droplist.

▶ **Capital One Shopping** – Compares prices across thousands of sites and rewards users with credits.

▶ **CouponBirds** – Wide coupon database and Chrome Web Store favorite for discounts.

Stay competitive, protect profitability, and capture more BFCM sales velocity.

Action Items

- [x] Optimize product data and descriptions for AI search visibility.

- [x] Use AI Agents for forecasting, pricing, and competitor tracking.

- [x] Scale creative variations with generative AI to prevent fatigue.

- [x] Monitor price competitiveness daily to avoid losing conversions.

Conclusion

AI is no longer optional. From discovery to optimization, it's reshaping the holiday playbook. Retailers that adapt fastest will win the visibility and efficiency battle.
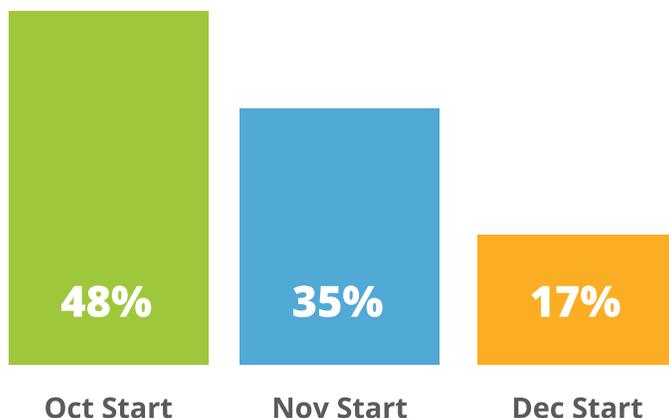
Amazon:
Setting the Q4 Pace

Nearly half of shoppers now start in October, thanks to Amazon's Big Deal Days. Mobile accounts for 53% of online spend, and bundles drive 40% of Q4 gifting sales. Multi-touch attribution reveals how each ad type contributes to conversions, helping brands allocate smarter.

Front-Load Demand With Early Black Friday Momentum

Shoppers are spreading purchases out to manage budgets. Amazon has trained them to expect early Q4 sales with October events like Prime Big Deal Days.

Holiday Shopping Start Times

Oct Start	Nov Start	Dec Start
48%	35%	17%

Historical Insights

▸ In 2023, 35% of all Amazon ad spend occurred during the end-of-year holiday season, with per-campaign budgets increasing each weekend in December—including early October activity ramp-up.

▸ Nearly half of consumers now start holiday shopping in October, establishing an early-bird shopping window that sets the stage for campaign longevity.

▸ Amazon U.S. Q4 2024 sales hit $115.6 billion, a 10% YoY increase, underlining the power of early demand capture ahead of Cyber Week.
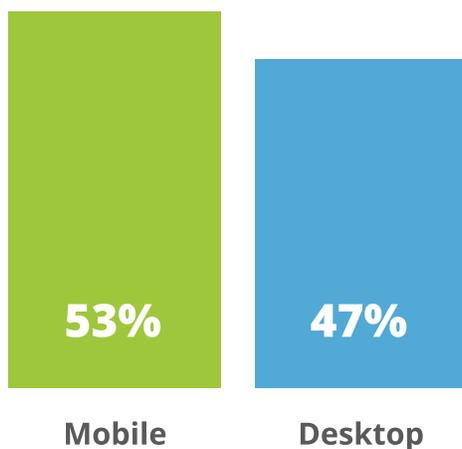
Key Plays for Growth

▸ Launch high-visibility deals in October to lock in ranking before CPCs surge.

▸ Pair Lightning Deals with coupons for maximum click-through and conversion lift.

▸ Build early traffic through Sponsored Products so you have organic momentum going into Cyber Week.

Mobile-First Listing and Creative Optimization

More than half of holiday e-commerce spending now happens on mobile, and shoppers make decisions in seconds. Optimizing for mobile-first browsing is critical to capturing these high-intent buyers.

Share of Holiday Online Spending (Nov-Dec)

Mobile	Desktop
53%	**47%**

Historical Insights

▸ Mobile accounted for 53% of U.S. online spending during Nov–Dec 2024, totaling $128.1 B.

▸ Mobile conversions grew 12.8% YoY during peak season.

▸ Holiday shoppers scan faster and bounce sooner on mobile than desktop.

Key Plays for Growth

▸ Ensure the first 80 characters of titles lead with most compelling keywords + value message.

▸ Use seasonal main images that clearly convey giftability or holiday use case.

▸ Refresh A+ and Brand Story sections by October so they're live before traffic spikes.

Diversify Ad Formats and Leverage Attribution

Holiday shoppers interact with multiple touchpoints before converting. Amazon's new attribution tools reveal where each format plays a role in driving sales, enabling smarter budget allocation.

Ad Spend Allocation Approaches

60%	**40%**
Last-Click Only	Multi-Touch Attribution
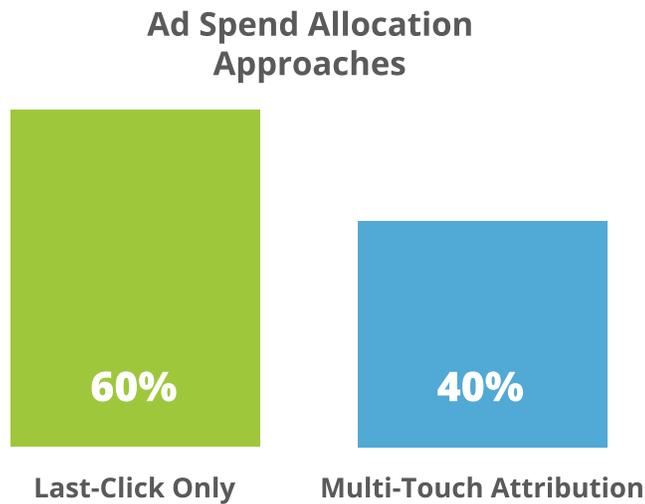
Historical Insights

▸ Amazon's new Multi-Touch Attribution model improves clarity on how ads across the funnel contribute to conversions.

▸ Holiday shoppers require multiple touchpoints before purchase, especially for higher-ticket or gift items.

▸ Brands relying only on last-click metrics risk underfunding awareness and retargeting.

Key Plays for Growth

▸ Run Sponsored Products for ranking stability and Sponsored Display for mid-funnel retargeting.

▸ Use MTA data to adjust mid-season spend toward the formats delivering incremental lift.

▸ Map creative to shopper intent: awareness creative early in season, urgency messaging in late December.

Bundle, Upsell, and Gift-Enable Your Catalog

Value is top of mind for shoppers this season. Bundles and gift-ready offers give them more for their money while boosting your average order value.

Q4 Gifting Sales Split

40%
Bundles/Multi-Packs

60%
Single Products
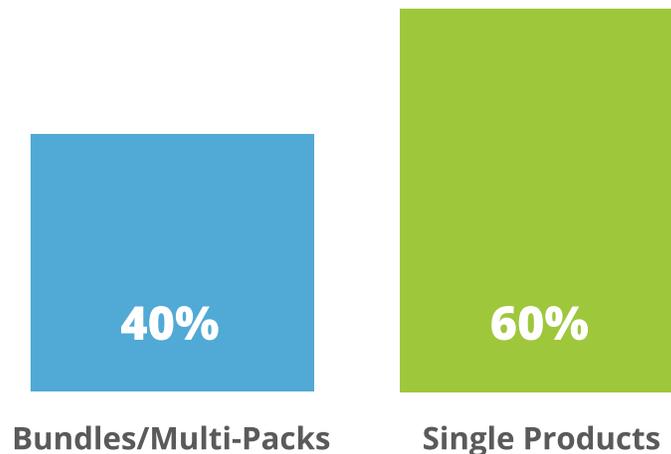
Historical Insights

▶ Black Friday–Cyber Monday 2024 saw ~$38B in U.S. online sales (Adobe Analytics) and 5.5 M new Prime members.*

▶ Amazon customers saved over $15 B in Q4 events, showing high sensitivity to perceived value.

▶ Bundles and multi-packs perform strongly in gifting categories due to value perception and convenience.

Key Plays for Growth

▶ Launch holiday-exclusive bundles with a strong price-per-unit advantage.

▶ Enable Gift Messaging and Gift Wrapping on all eligible SKUs.

▶ Run Sponsored Products and Sponsored Brands campaigns targeting high-volume "gift" and "holiday" terms to intercept gift guide shoppers.

▶ Optimize top SKUs for seasonal keywords to increase organic visibility during gift guide traffic surges.

* Quivo (summarizing Amazon data): Amazon gained 5.5 million new Prime members in the USA during Peak Season 2023 quivo.co
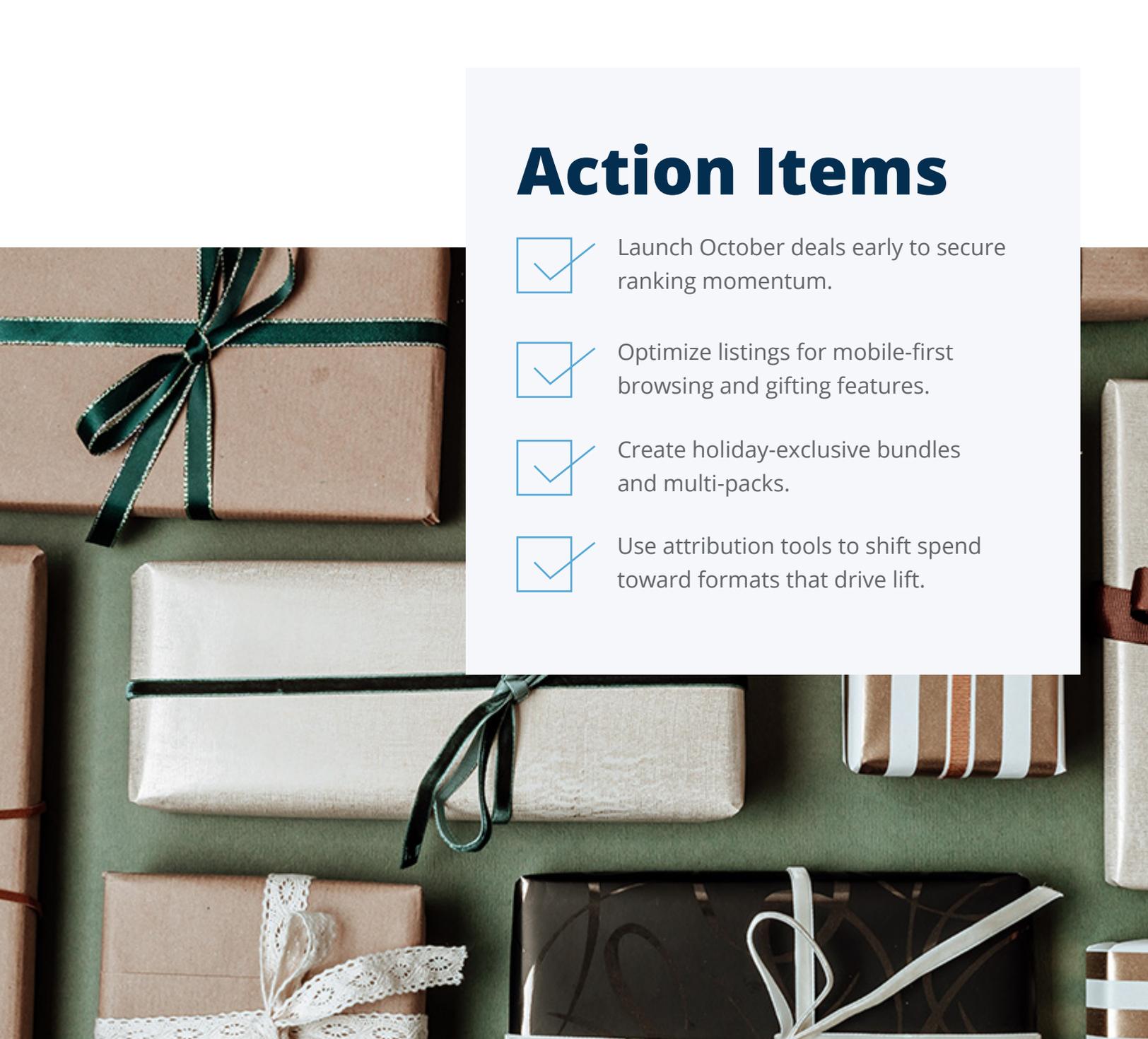
Action Items

☑ Launch October deals early to secure ranking momentum.

☑ Optimize listings for mobile-first browsing and gifting features.

☑ Create holiday-exclusive bundles and multi-packs.

☑ Use attribution tools to shift spend toward formats that drive lift.

Conclusion

Amazon remains the most powerful holiday channel. Brands that lean into early deals, gifting bundles, and attribution will outperform late starters.

Measurement:
Invest Where It Works

With ad costs climbing, measurement is the difference between profit and waste. RFM analysis surfaces Champions, Loyalists, and At-Risk customers. Predictive flows show when to upsell. Incrementality testing proves which campaigns truly add value.

Find "Champions" and maximize marketing budgets

Recent Customers	Need Attention	At Risk	Hibernating	Lost
Bought more recently but not often	Above average recency, frequency & monetary values	Spent a lot, purchased frequently but a long time ago	Low spenders, low frequency and purchased a long time ago	Lowest recency, frequency & monetary values

Deprioritize **Ignore**

Loyal Customers	Big Spenders	Can't Lose Them
Spend good money. Responsive to promotions.	Spent a lot, purchased frequently but a long time ago	Spent a lot, purchased frequently but a long time ago

Nurture **Reactive**

Champions
Bought recently, bought often and spent the most.

Acquire & Attain

Name ▲	Customers	Orders	Revenue	Status	Action
About to Sleep	15.9k	16.0k	$1.0m	Success	↻ ⋮
All purchases	195.5k	259.8k	$46.9m	Success	↻ ⋮
AOV $67	163.0k	220.6k	$45.4m	Success	↻ ⋮
At Risk	22.2k	53.4k	$9.1m	Success	↻ ⋮
Champions	18.3k	51.6k	$9.6m	Success	↻ ⋮
Customers With AOV Greater Than $120	119.6k	162.2k	$39.9m	Success	↻ ⋮
Loyal Customers	14.5k	28.9k	$5.0m	Success	↻ ⋮
Need Attention	2.1k	4.2k	$292.6k	Success	↻ ⋮
Potential Loyalists	23.3k	23.3k	$1.6m	Success	↻ ⋮
Promising	7.7k	7.7k	$357.9k	Success	↻ ⋮
Recent Customers	7.5k	7.5k	$349.9k	Success	↻ ⋮

Build Audiences with RFM

Recency, Frequency, Monetary

Capture "Low Hanging Fruit"

It's time to bring them back – while keeping costs in check!

Choose the "right" products

Predicting the next purchase to bring customers back for Q4

Proposed Upsell Flow for Maximum LTV

1st purchase	2nd purchase	3rd purchase

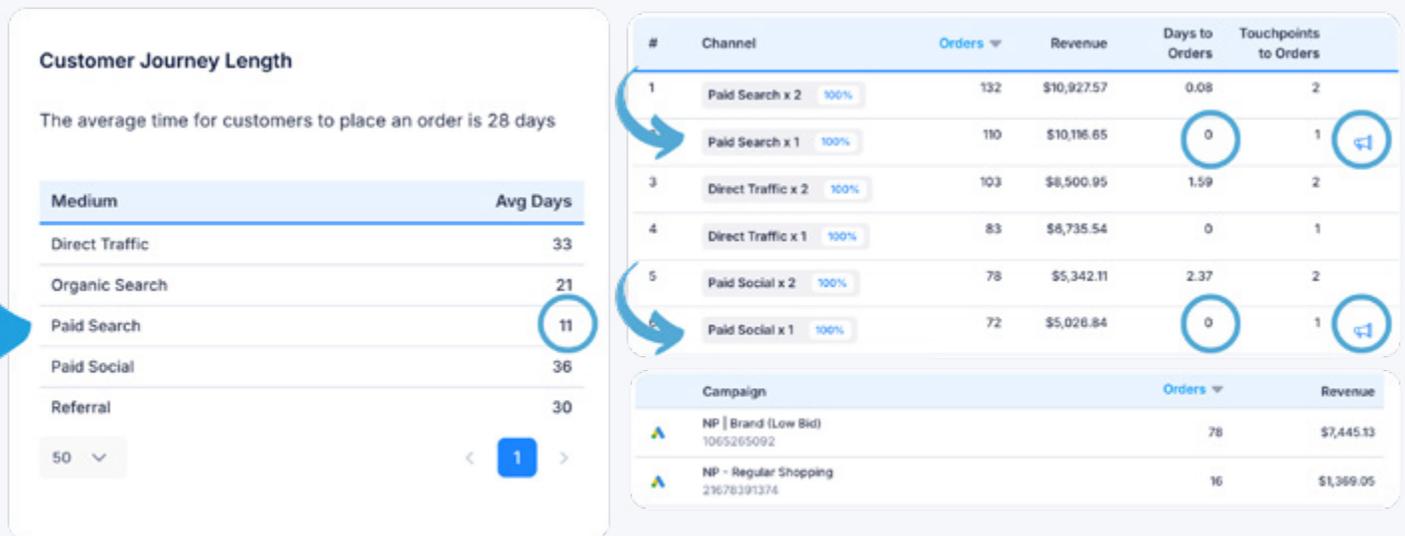**Product: Sticker Sheet** — Approximately 13 days — **Product: Sticker Sheet** — Approximately 24 days — **Product: Standard**

Customers who buy the Sticker Sheet are most likely to buy the Sticker Sheet next, then the Standard.

Approximate time between purchases:

- 35 days from 1st touch to 1st purchase
- 13 days from 1st purchase to 2nd purchase
- 24 days from 2nd purchase to 3rd purchase

Choose the "fastest" channel

Where are customer channels converting the fastest, and how can you scale them?

Customer Journey Length

The average time for customers to place an order is 28 days

Medium	Avg Days
Direct Traffic	33
Organic Search	21
Paid Search	11
Paid Social	36
Referral	30

50

< 1 >

#	Channel	Orders	Revenue	Days to Orders	Touchpoints to Orders
1	Paid Search x 2 100%	132	$10,927.57	0.08	2
2	Paid Search x 1 100%	110	$10,116.65	0	1
3	Direct Traffic x 2 100%	103	$8,500.95	1.59	2
4	Direct Traffic x 1 100%	83	$6,735.54	0	1
5	Paid Social x 2 100%	78	$5,342.11	2.37	2
	Paid Social x 1 100%	72	$5,026.84	0	1

Campaign	Orders	Revenue
NP | Brand (Low Bid) 1065265092	78	$7,445.13
NP - Regular Shopping 21678391374	16	$1,369.05

Your modern measurement toolkit

MMM	Attribution solutions	Incrementality experiments

Action Items

- [x] Segment audiences with RFM and prioritize Champions.

- [x] Run incrementality tests to validate channel performance.

- [x] Build predictive upsell flows to increase LTV.

Conclusion

Precision beats volume. Accurate measurement ensures every dollar is directed to campaigns that truly lift results.

Merchandising:
Balancing Value & Profitability

Holiday merchandising requires creativity and discipline. Bundles, tiered discounts, and VIP early access help protect margins while creating perceived value. Experience-driven gifting—from event tickets to curated sets—is gaining traction alongside traditional gift ideas.

Which merchandising strategies will you choose?

Where are customer channels converting the fastest? How you can scale it?

Flash Sales & Limited Time Deals

BFCM Bundle Deals

Leverage Your Loss Leaders

Early Access Promotions

Tiered Discount Deals

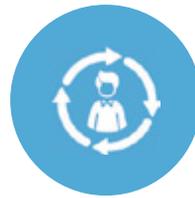Mystery & Unlock-able BFCM Deals

Free Gift/Shipping with Purchase

Cross Sells & Up Selling

Exclusive Member Offers

Personalized Product Recommendations

Last Minute & Lightning Deals

Top Gifting "Buckets"

Need Inspiration? Here are a few ideas - Broken Down by search popularity

Gift Recipients
40%
- Gifts for men
- Gifts for mom
- Gifts for dad
- Gifts for men
- Gifts for boyfriend
- Gifts for women
- gifts for him
- Gifts for her
- Gifts for grandma
- Best friend gifts

Gift Sets
17%
- Gift sets
- Luxury gifting sets
- Tom Ford gift sets
- Holiday gift sets near me
- Starbucks gift set

Holiday Occasions
11%
- White elephant gift ideas
- White elephant gifts
- Secret Santa gifts
- Last minute - Christmas gifts

Gift Cards
8%
- Gift cards
- Gift card exchange

Gift Ideas
7%
- Gift ideas
- Gag gifts
- Gift ideas for women
- Unique gifts
- Gift ideas for mom
- Unique gifts for men

Gifts By Price
1%
- Gifts under $25
- $20-$50 gift ideas
- $100 gift ideas
- $125 gift ideas
- $150 gift ideas

How to balance BFCM Finances

Knowing the impact of our investments

Profit Margin Pressures

- ▶ Aggressive discounts and deals will likely impact profit margins.
- ▶ Balancing attractive offers with maintaining profitability is crucial.

Inventory Management

- ▶ Demand spikes during BFCM can strain inventory levels.
- ▶ Overstocking or understocking can both have financial repercussions.

Marketing Expenses

- ▶ Tariffs
- ▶ Promotions, advertising, and marketing campaigns incur costs.
- ▶ Allocate budgets strategically to ensure effective reach and ROI.

Easily Showcase Product Assets & Reduce Steps Between Discovery and Conversion

Enable Product Feeds on Demand Gen

Add a GMC feed to your Demand Gen campaign to dynamically showcase the most relevant products to each user in the right moment.

On average, adding a product feed to DG drives +33% conversions at a similar CPA.1 For advertisers running DG with product feeds, they see more than a 2x increase y/y in conversions per dollar spent.

Enable Checkout on Merchant on Demand Gen

Checkout on Merchant (currently available in US users only) reduces the steps from click to purchase by directing customers from product feed to a cart or final checkout URL on YouTube in-stream inventory.

On avg, advertisers who provide Checkout URLs achieve an additional +11% in Conversion Value at a similar CPA.4
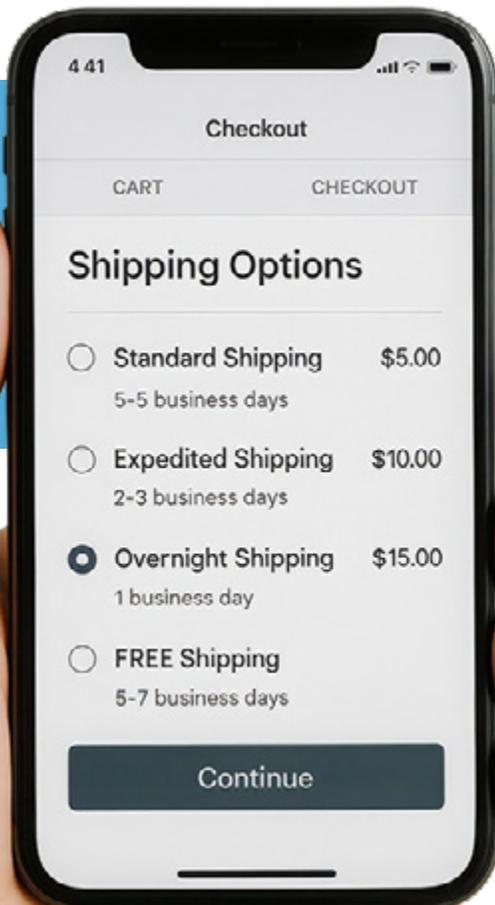
Tip: Interested in driving clicks? Product Feeds drive +18% more clicks at a similar cost - add them to your DG campaigns!

Source: 1. Google data, Global, November to December 2023 2. Google Internal Data, April 2024 - April 2025. 3. Checkout on Merchant has plans to expand to IN, BR, CA, UK, and JP in 2025 4. Google internal data, US, February 2025, Conversion value defined as a minimum of $250 or advertiser chosen value. 5. Google data, Global, November to December 2023 *In this case, shallow conversions are either 1) Engagements or 2) Page loads

Start Holiday Creative Testing for your clients now!

Launch Holiday Creatives as early as possible with a strategic campaign structure

Creative Testing

▶ **Launch creatives early** to identify winners before peak season

▶ **Use structured campaigns** for scalable testing (audiences, formats, offers)

▶ **Optimize based on performance data** → double down on top creatives by November

▶ Reduce risk of fatigue by rotating fresh variations

▶ **Early testing = stronger performance when holiday demand peaks**

Use AdBeacon to Identify Opportunities

▶ **Identify Winners Fast** – Track creative performance across Meta, TikTok, Pinterest and SnapChat in one dashboard

▶ **Variant Testing at Scale** – Compare headlines, images, CTAs, and offers with precision

▶ **Creative ROI Insights** – See which ads truly drive conversions, LTV, and new customer revenue

▶ **Real-Time Alerts** – Get notified when creatives fatigue or performance dips

Increase ad performance with Partnership Ads.

Link creator video to use video as Partnership Ad.
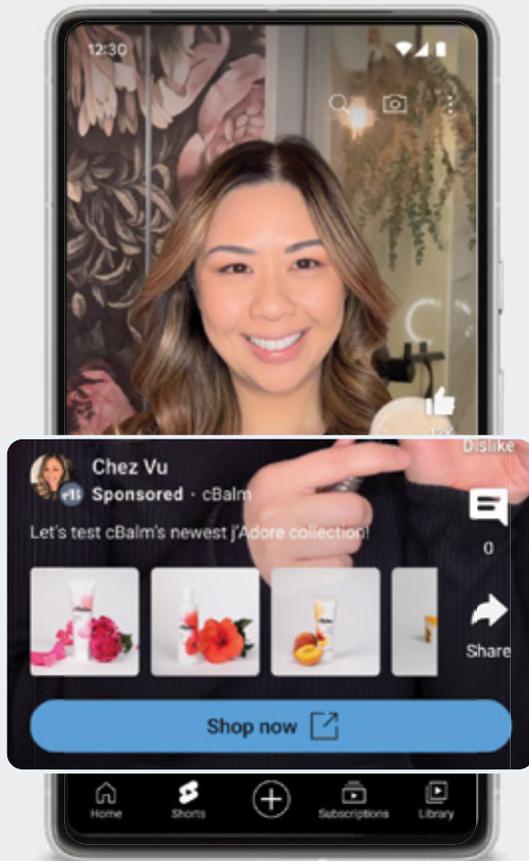
20% HIGHER CONVERSION

Partnership ads that live on the creator's channel saw 10% more clicks to advertiser website and drove up to 20% higher conversions on the Shorts feed than ads with advertiser branding alone.

Action Items

☑ Launch bundles and gift sets with strong value perception.

☑ Use tiered discounts to preserve profitability.

☑ Add personalized gift recommendations and curated guides.

Conclusion

Merchandising is the bridge between value and profitability. Smart bundles, creative promotions, and gift guides will convert cautious shoppers into loyal buyers.

Holiday Preparation:
A Lifecycle Approach

Winning brands treat BFCM as more than a weekend. With a late Thanksgiving compressing the season, early preparation is critical.

August: Set goals, unit economics, and measurement baselines.

September–October: Launch creatives, test offers, capture early traffic.

November: Scale winning campaigns into Cyber 5.

December: Capture last-minute buyers and extend momentum with gift card redemptions and win-back flows.

Take Action **NOW** to Meet Shoppers in Their Journeys

Specifically designed to engage users earlier and provide comprehensive answers to encourage shopping

August: Set the Foundation

- ▶ Define holiday goals and unit economics to ensure profitability.
- ▶ Confirm measurement setup (including enhanced conversions).
- ▶ Launch and test Demand Gen + video campaigns to identify top creatives and audiences early.

September – October: Optimize & Scale

- ▶ Prepare for bid strategy changes heading into Cyber 5.
- ▶ Optimize all Search and Performance Max campaigns.
- ▶ Leverage micro-seasonal peaks to test offers and capture seasonal demand.

November: Final Push Before Peak

- ▶ Finalize creatives, promotions, and price extensions.
- ▶ Make final daily budget increases and adjust ROAS targets for maximum returns.

December – End of Year: Capture & Retain

- ▶ Capture last-minute shoppers with local inventory ads after shipping deadlines.
- ▶ Convert post-holiday traffic (gift card redemptions, returns) into momentum for Q1 2026.

Predictions & Recommendations for BFCM 2025

Predictions

- ▸ **Customer Acquisition Costs Rising** → Higher CPA/CPM, harder to acquire new customers

- ▸ **ROAS Plateauing** → Spend efficiency declining, margins under pressure

- ▸ **New Customer Revenue Dropping** → Greater reliance on retention & loyalty

- ▸ **AOV Increasing** → Higher cart values offsetting rising costs

September – October: Optimize & Scale

- ▸ **Double Down on Retention** – Loyalty, VIP, win-back flows, personalized offers

- ▸ **Smarter Acquisition** – Target high-LTV lookalikes, premium focus

- ▸ **Optimize AOV** – Bundling, dynamic pricing, upsells

- ▸ **Diversify Channels** – Don't over-rely on Meta; test TikTok, Google, owned channels

- ▸ **Leverage AI Agents** – Real-time alerts, price tracking, creative optimization, and forecasting

How the National Positions team can help you

Weekly or Daily Budget Pacing & Performance Updates

▶ Understand revenue pacing and budget on a weekly or daily basis

▶ Channel specific opportunities to shift budget into performance

▶ Additional notifications regarding increased spending opportunities will be provided

Creative insights and Feedback

▶ Weekly creative feedback and suggestions

▶ Pivot strategies

▶ A/B testing insights and recommendations

AdBeacon Insights & Product Opportunities

▶ Leverage AdBeacon's proprietary technology to suggest product specific promotional opportunities

▶ Automatically track inventory and pull back on budget on low inventory skus.

▶ Review new lifetime value marketing strategies to build customer loyalty and AOV.

Next Steps
BFCM 2025

Treat BFCM as a lifecycle moment, not just a weekend — integrate data, loyalty, and retention for long-term impact

Plan Early & Extend Timeline

Start campaigns in Sept/Oct, carry momentum into Q1 2026

Upgrade Tracking

Implement advanced attribution models through AdBeacon

Start Q3 Now

Segment customers & launch loyalty early

Focus on Retention

VIP programs, win-back flows, personalization

Leverage Data

Use zero- & first-party data to segment and personalize campaigns
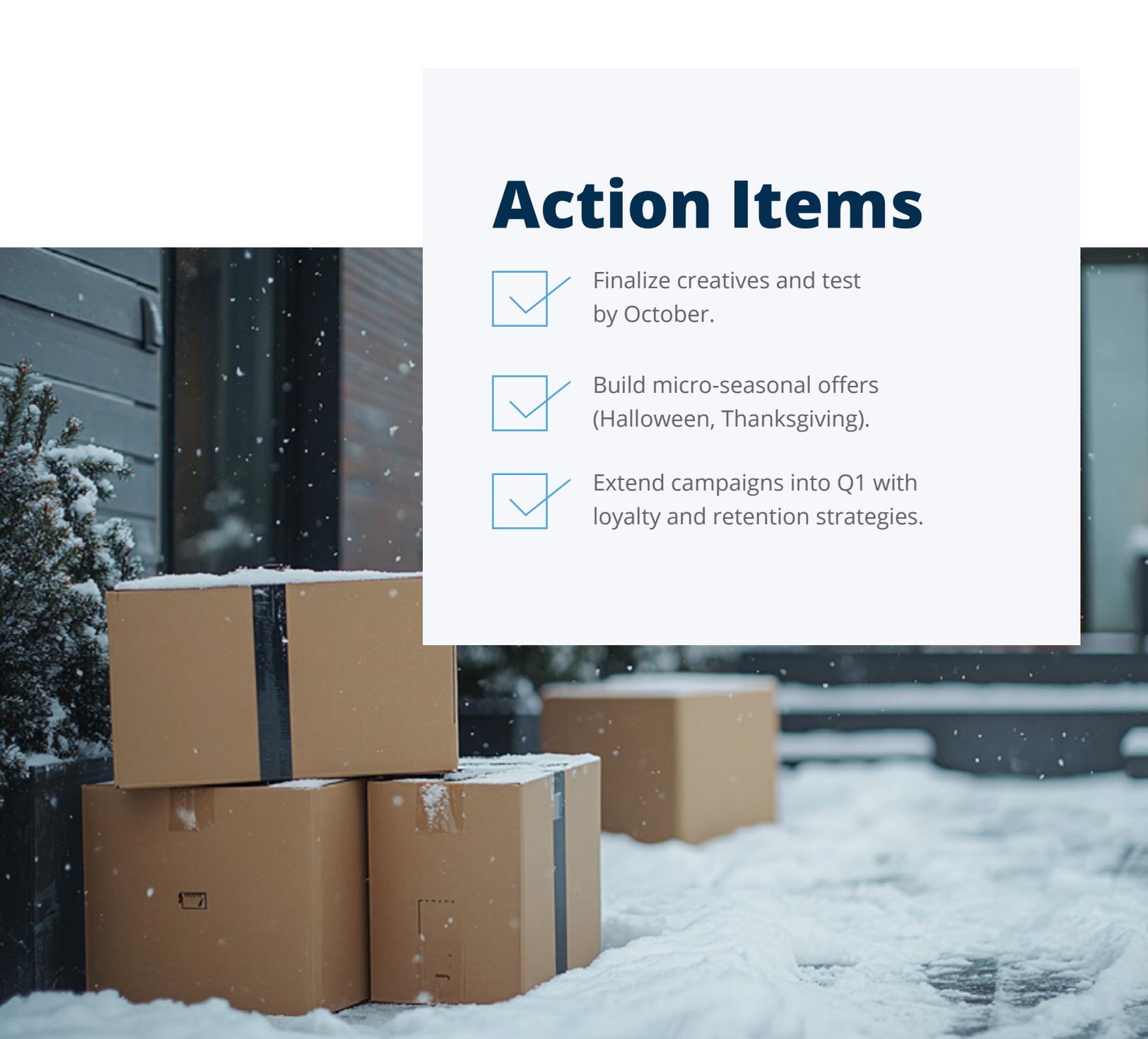
Plan for Higher Costs

Budget +30–35% ad spend with ROI guardrails

Diversify Channels

Reduce reliance on any particular channel and test emerging channels

Brands that prepare early and leverage Data and AI will win this holiday season.

Action Items

- ☑ Finalize creatives and test by October.

- ☑ Build micro-seasonal offers (Halloween, Thanksgiving).

- ☑ Extend campaigns into Q1 with loyalty and retention strategies.

Conclusion

The compressed season leaves little room for error. Brands that prepare early and extend campaigns into Q1 will maximize both holiday and long-term gains.

Let's win the holidays together.

BFCM 2025 will be the most competitive yet. Rising CPAs and flat ROAS mean retention is the new growth engine. Experiences are competing with products, and AI is changing discovery and optimization. Brands that prepare early, focus on customer lifetime value, and leverage AI will win the season—and carry momentum into 2026.

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