

Optimove Insights :

2025 Consumer Holiday Retail Shopping Survey

July 2025

Insights

**Marketers who adopt Positionless
Marketing will be positioned to meet
the moment and drive long-term
customer loyalty**

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Executive Summary

The **Optimove Insights 2025 Consumer Holiday Retail Shopping Survey** reveals a complex consumer landscape for the upcoming holiday season. Shoppers are ready to spend but are navigating rising prices, economic uncertainty, and marketing overload. For marketers, the findings point to a critical need for **agility, personalization, and customer-centric marketing strategies**.

What These Findings Mean for Marketers

The 2025 holiday season demands a **new level of marketing responsiveness and precision**. Consumers are starting their holiday shopping earlier, demanding better deals, expecting seamless omnichannel experiences, and quickly disengaging when marketing feels irrelevant or excessive.

For brands, this underscores the need for **Positionless Marketing**. Traditional marketing roles and handoffs slow down the process at a time when speed and relevance are key. With **Optimove's Positionless Marketing approach**, any marketer can independently:

- Access and analyze customer data
- Create personalized, channel-ready campaigns
- Launch and optimize self-adjusting marketing journeys in real time

This level of independence enables marketers to respond instantly to shifting consumer behaviors—whether it's pushing an early offer, personalizing a message based on lifestyle data, or scaling communications up or down to avoid fatigue.

The bottom line: brands that empower marketers to act instantly and autonomously will be best positioned to capture consumer attention and loyalty in Holiday 2025.

Summary of Key Findings

1. Consumer Spending and Economic Sentiment

- 48% of consumers plan to increase their holiday budgets compared to 2024, despite concerns about inflation and tariffs.
- 79% feel as confident or more confident in their holiday budgets, though 27% have less confidence in the broader economy.
- 80% of shoppers are concerned about inflation, and 84% are worried about tariffs affecting prices.
- Top spending concerns include rising prices on essentials (28%) and increased lifestyle costs (20%).

2. Holiday Shopping Timing and Channels

- 64% of consumers plan to start shopping before Halloween, with 49% starting in October or November.
- 66% are motivated by discounts, and 30% by product availability, prompting early action.

- 59% will still wait for Black Friday or Cyber Monday for major purchases.
- Omnichannel shopping is key:
 - 84% of consumers will shop online,
 - 53% will combine in-store and online,
 - 31% will shop exclusively online.

3. Brand Loyalty and Decision-Making

- 55% have predetermined where they'll shop, but 54% are open to new brands.
- Consumers switch for better quality (38%) and better prices (37%).
- 57% choose unplanned stores for better prices, and 28% for better product selection.
- Amazon (89%), Walmart (61%), and Target (60%) remain top shopping destinations.

4. Communication Preferences and Marketing Fatigue

- 88% of consumers want holiday offers early, with 59% preferring them more than a month in advance.
- 55% prefer email, but 35% want fewer messages, and 10% feel bombarded.
- 63% do not open at least half of their marketing emails, and 80% say they receive emails from brands they don't remember subscribing to.
- 82% unsubscribe from brands while shopping online, and 40% unsubscribe from four or more brands during the holidays.
- Engagement is driven by relevance (39%), special offers (23%), and personalized messaging (20%).
- Marketing fatigue starts early: 55% are tired of holiday marketing by October, rising to 71% by the end of November.

5. Shopping Preferences and Values

- Price is the top priority, with 64% saying price matters more than service, and 81% naming price as their primary factor.
- 84% check online prices while shopping in-store, and 44% do this very often.
- 81% plan to buy gift cards, favoring Amazon (82%), Walmart (39%), and Target (33%).
- 51% consult AI for gift ideas, highlighting the growing role of AI in shopping.
- 66% are willing to pay more for eco-friendly products, and 51% prefer brands committed to sustainability.

Conclusion

The 2025 holiday season will reward brands that embrace **Positionless Marketing** and give marketers the freedom to act in real time. Consumer demands are shifting fast, and only brands that can deliver **early, personalized, and customer-centric experiences—without operational bottlenecks—will thrive in this competitive landscape.**

Methodology

The Optimove Insights 2025 Consumer Holiday Retail Shopping Report is based on a survey of retail shopping intentions conducted in July 2025, querying 345 U.S. citizens aged 21-plus with annual household incomes of \$75,000 or more.

Detailed Findings

Part 1 – Economy:

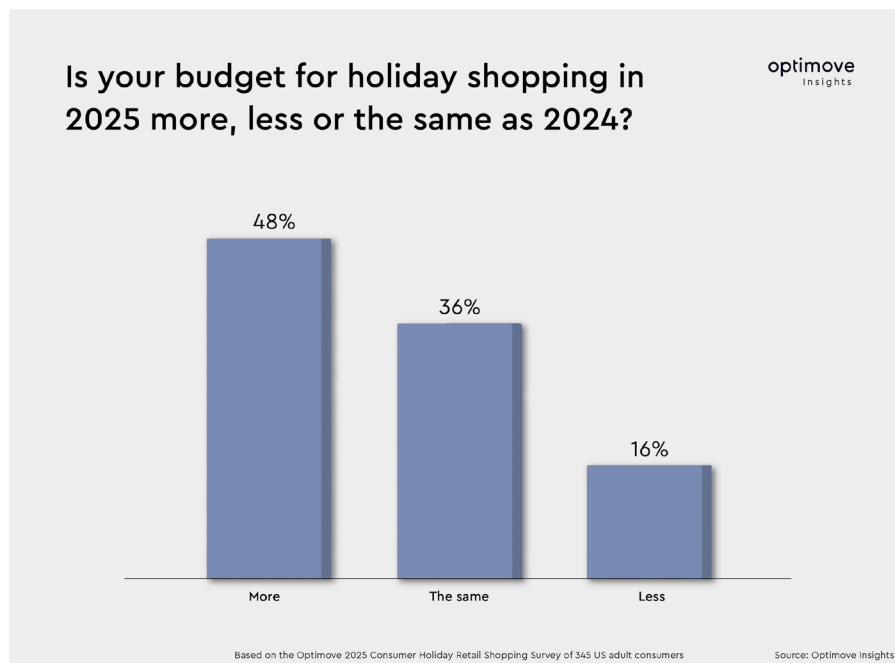
Optimove Holiday 2025 Consumer Budgeting Trends

Introduction

As the 2025 holiday season approaches, consumers are entering the retail period with cautious optimism. According to Optimove's 2025 Consumer Holiday Retail Shopping Survey, shoppers are showing a strong intent to spend. However, ongoing concerns about inflation, tariffs, and economic stability continue to influence their behavior and decision-making. This section outlines the key findings and what they mean for brands preparing for the holiday rush.

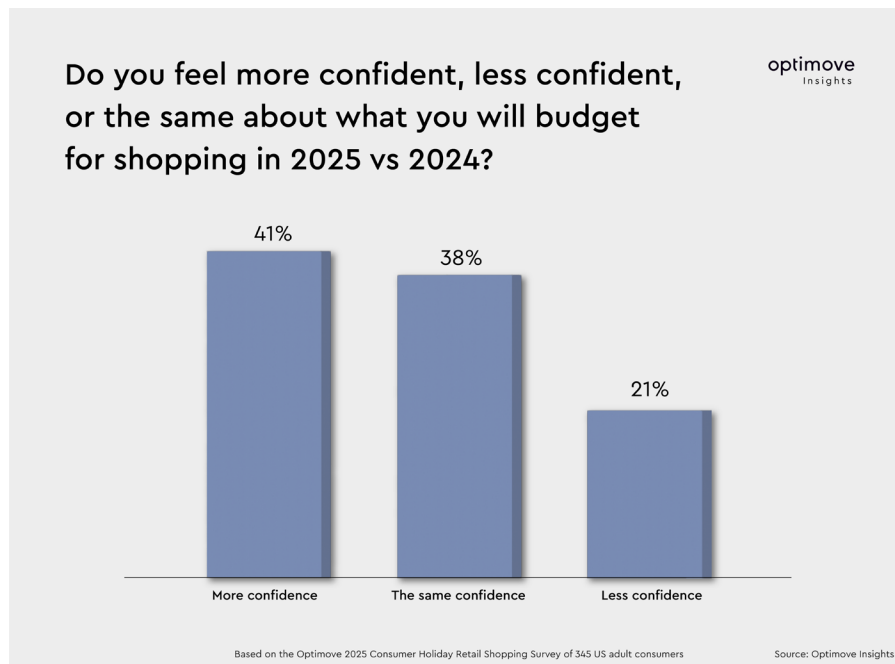
Spending Outlook: Budgets Are Up

Nearly half of consumers, forty-eight percent (48%), say they plan to increase their holiday shopping budget in 2025 compared to 2024. More than one-third plan to spend about the same, and only 16% say they will spend less. This reflects a resilient consumer base that is still willing to shop, even in the face of external pressures.



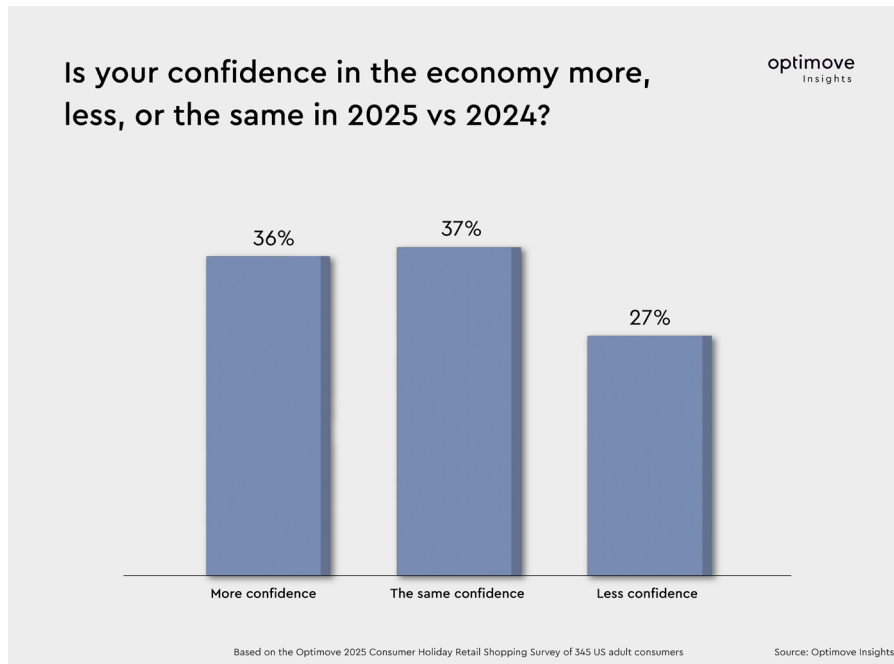
Budget Confidence Is Holding

Shoppers appear more confident in their financial plans. Seventy-nine percent (79%) say they have as much or more confidence in their holiday budgets this year. In fact, forty-one percent (41%) feel more confident than they did last year. This confidence likely contributes to the increased spending plans and signals a potential opportunity for retailers to encourage early purchasing.



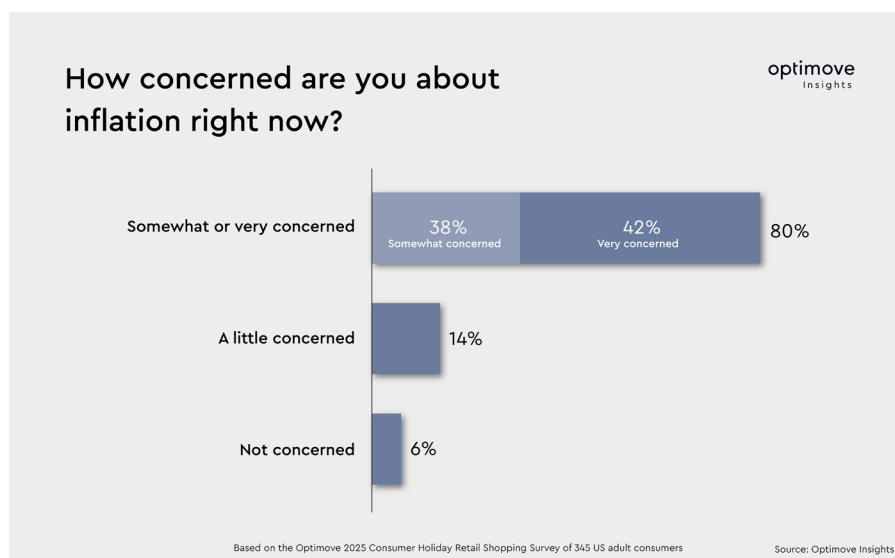
Economic Sentiment Is Mixed

While 73% of consumers feel at least as confident in the economy as they did in 2024, twenty-seven percent (27%) report having less confidence. This split view reflects broader economic uncertainty, especially as households continue to adjust to price fluctuations and the lingering effects of economic shifts over the past few years.



Inflation Remains a Key Concern

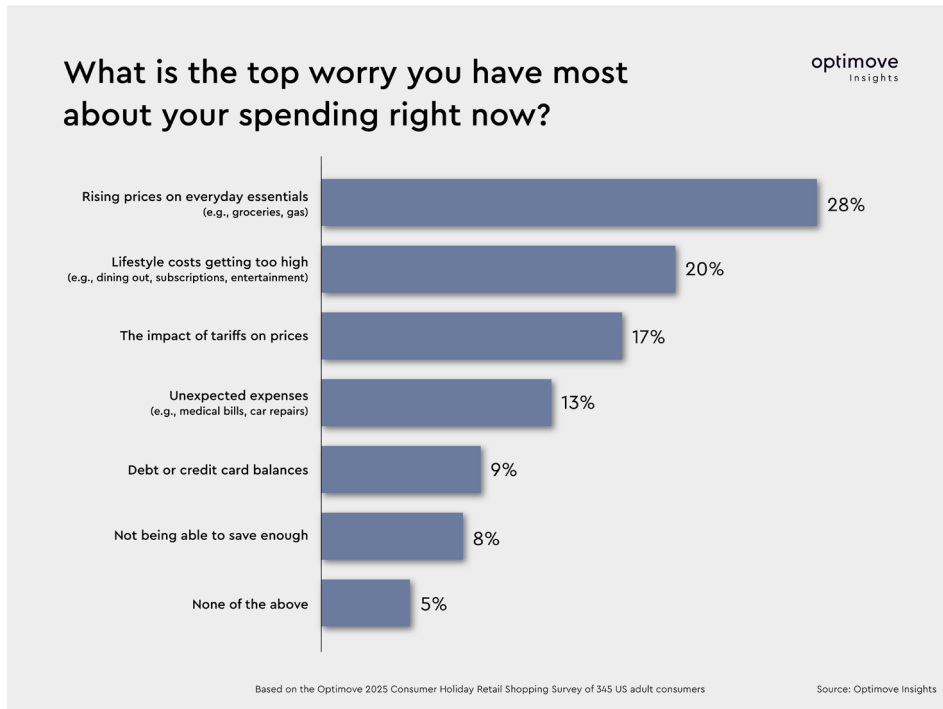
Eighty percent (80%) of consumers report being at least somewhat concerned about inflation. Among them, forty-two percent (42%) say they are very concerned. Only 6% of respondents say they are not concerned at all. These numbers suggest that price sensitivity will play a significant role in how consumers choose where and how to shop this holiday season.



What Consumers Worry About Most

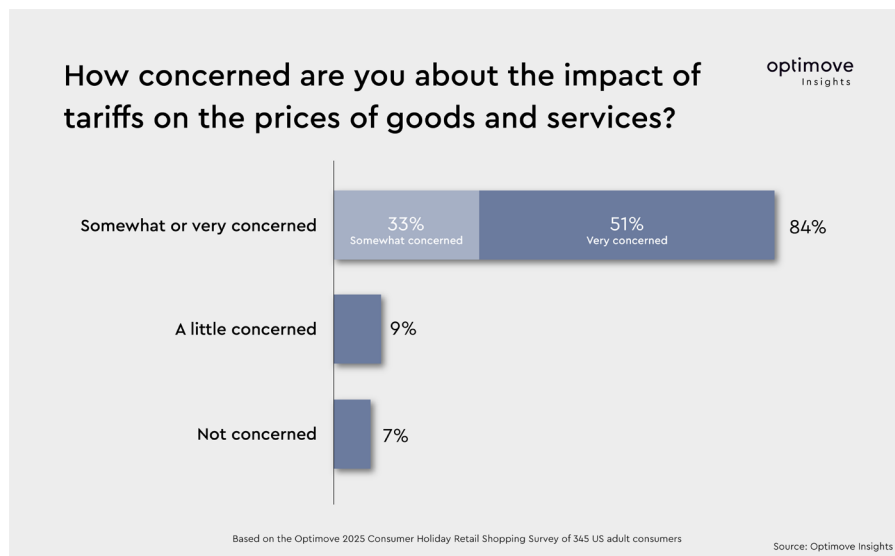
When asked about their top concerns related to spending, consumers highlighted two main areas:

- Rising prices on everyday essentials, such as groceries, at 28%
- Increasing lifestyle costs, including dining out and entertainment, at 20%



Tariffs Add to Pricing Anxiety

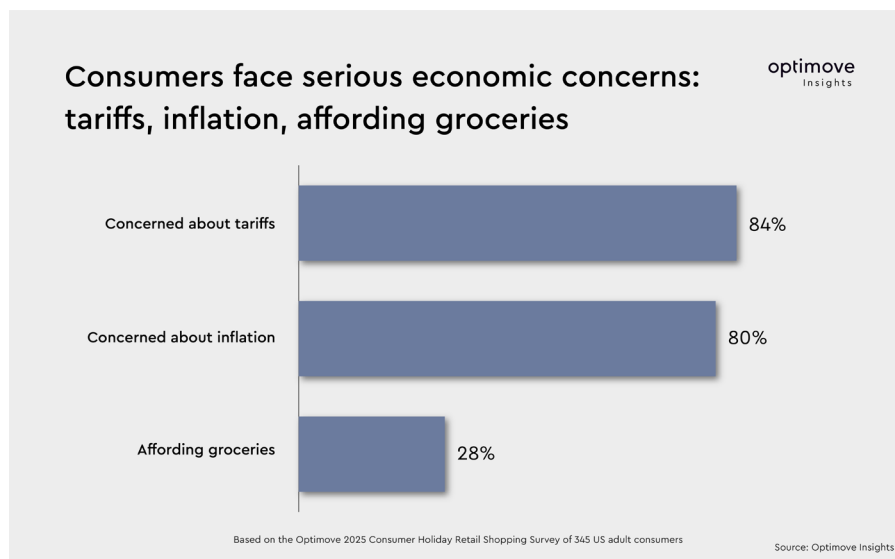
The impact of tariffs is also on consumers' minds. Eighty-four percent (84%) of respondents are at least somewhat concerned about how tariffs could affect prices, with more than half, fifty-one percent (51%), saying they are very concerned. This level of anxiety suggests that pricing clarity and transparency will be important for retailers throughout the season.



Conclusion Regarding Budgeting and the Economy

The 2025 holiday season is expected to be active, but brands must navigate a consumer landscape shaped by both confidence and significant concern.

Shoppers are ready to spend and feel prepared to manage their budgets, but they are watching prices closely and reacting to economic signals. Retailers that offer value, empathy, and flexibility will be best positioned to succeed during this critical time of year.



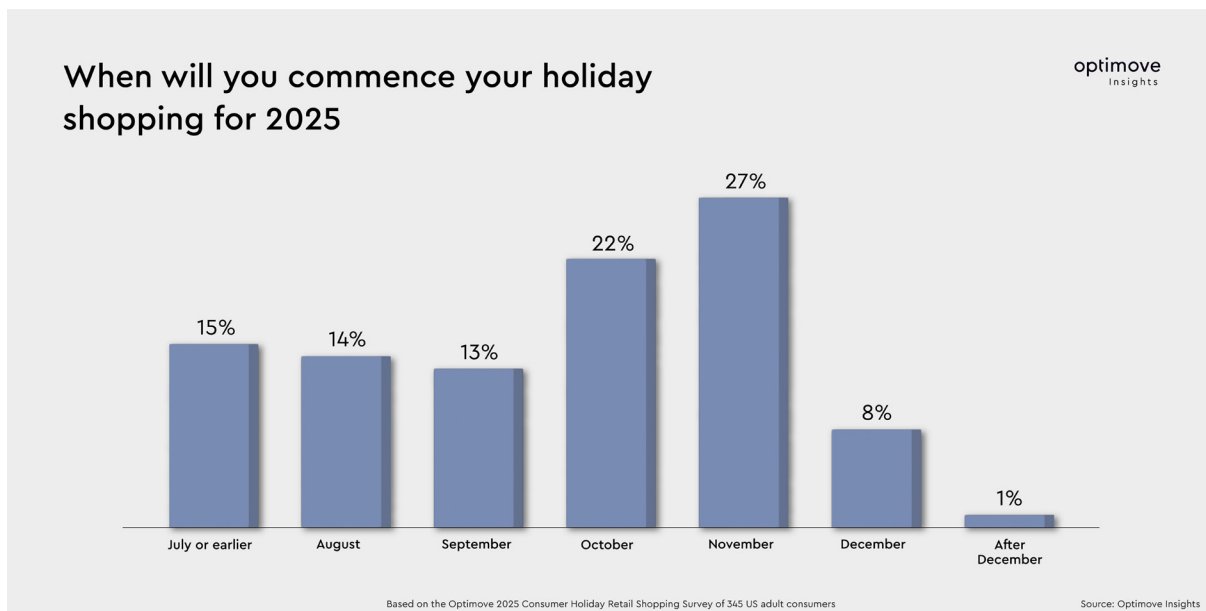
Part 2 – Planning:

Holiday 2025 Consumer Shopping Planning

Consumers are planning to start their holiday shopping early in 2025, with 64% starting before Halloween. Nearly half (49%) will begin shopping in October (22%) or November (27%), making these the peak months for holiday deal-seeking behavior.

Discounted prices are the top driver of early shopping, motivating 66% of respondents to shop sooner rather than later. The availability of items, cited by 30% of respondents, is also a key factor pushing consumers to make purchases before peak season sellouts.

Despite starting early, **fifty-nine percent (59%) of shoppers still wait for Black Friday or Cyber Monday** to make major purchases. This indicates that while consumers are browsing early, many hold out for perceived “best deal” days.



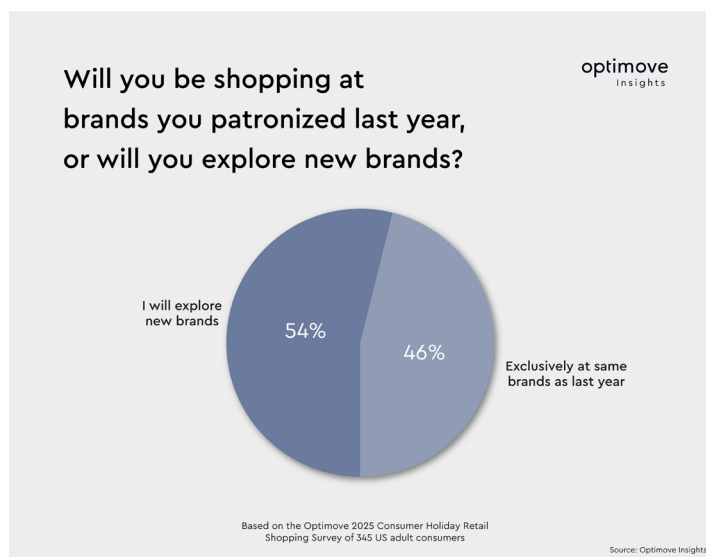


Omnichannel is important and online dominates as 84% will do some shopping online. When it comes to shopping channels, consumers prefer a mix of in-store and online experiences:

- **53%** shop both online and in-store
- **31%** shop online only
- **16%** shop exclusively in-store



Brand loyalty is in flux this year. Fifty-five percent (55%) of shoppers already know where they plan to shop, but 54% are open to trying new brands, while 46% plan to stick with the brands they used last year. The primary reasons for switching include **product quality (38%)** and **price (37%)**.

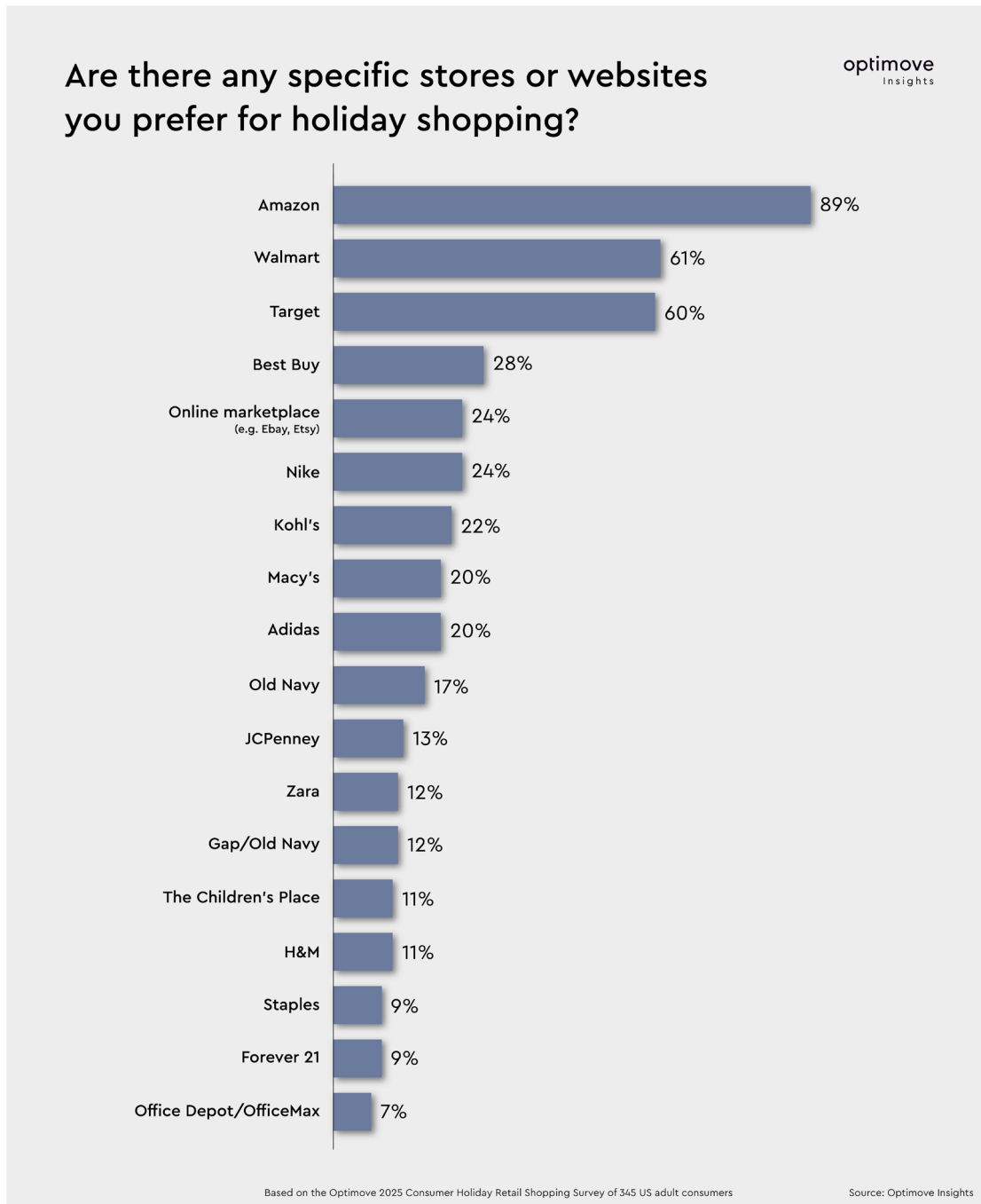




When consumers do shop at an unplanned store, **fifty-seven percent (57%) say it's because of better prices**, while **28% cite better product selection** as the reason for making the switch.



Amazon remains the top shopping destination, selected by **89% of respondents**, followed by **Walmart (61%)** and **Target (60%)**. These brands are seen as reliable for price, availability, and convenience.



Part 3 – Communication:

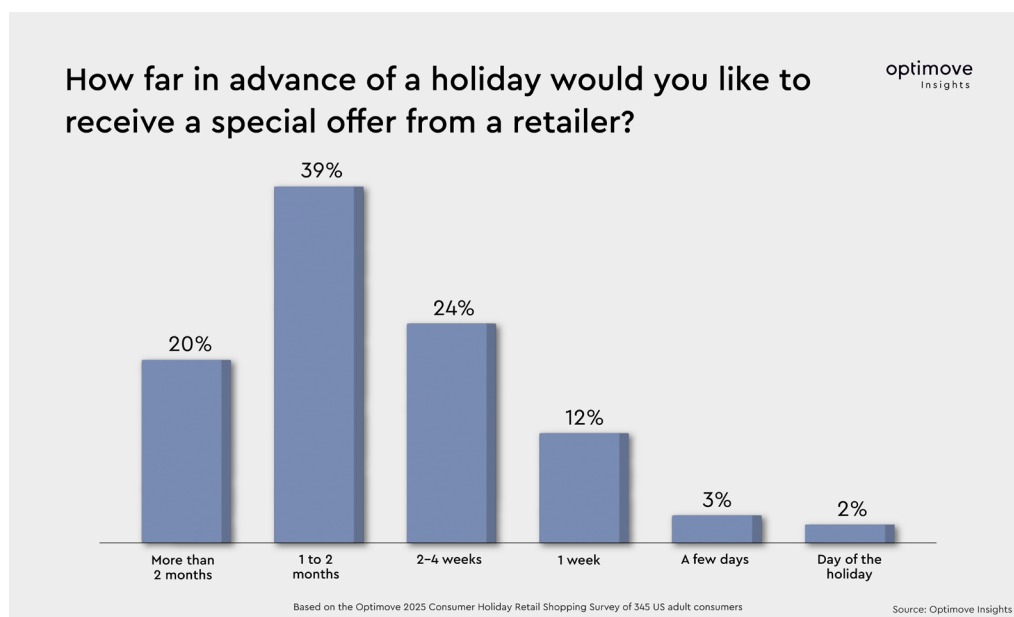
Consumer Communication Preferences: Holiday 2025

Consumers are signaling a clear desire for early, relevant, and personalized communication from retailers this holiday season. The majority want to be engaged early in the shopping cycle but are also sensitive to marketing fatigue.

Early Offers Are Expected

Eighty-eight percent (88%) of consumers prefer to receive holiday offers early from their favorite retailers. This preference aligns with the broader trend of early shopping, as most consumers begin browsing and purchasing well before December.

Fifty-nine percent (59%) of shoppers want to receive special offers from retailers more than a month in advance. Another 24% prefer to get offers at least two weeks ahead of time. These findings highlight the importance of starting promotional outreach early in the season to capture consumer attention before the rush.



Personalization Matters

Fifty-five percent (55%) of respondents said that receiving offers based on past purchases is important, and 31% consider it very important. This points to the increasing expectation for brands to use purchase history and preferences to tailor offers.

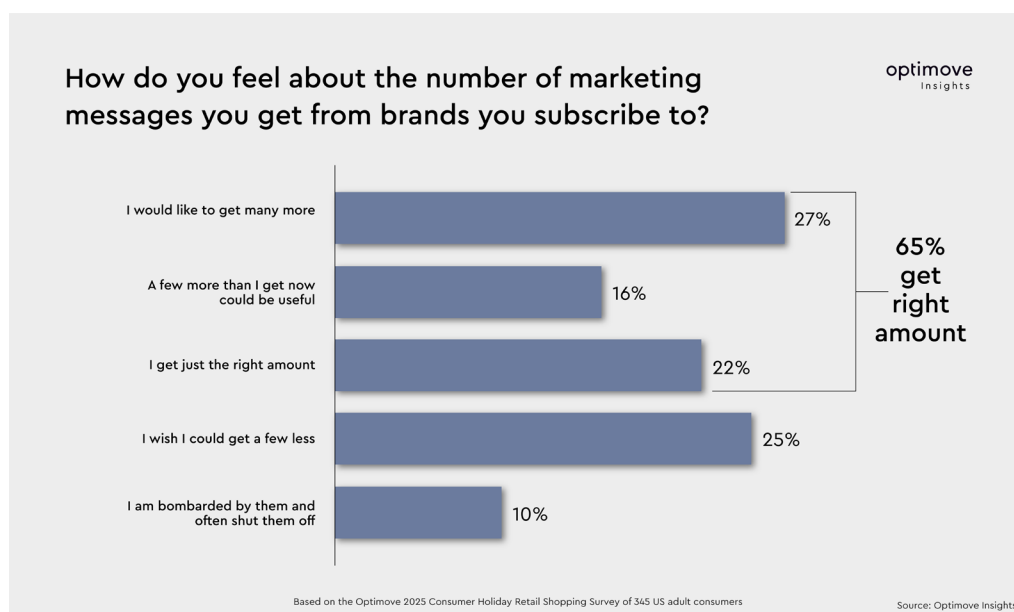
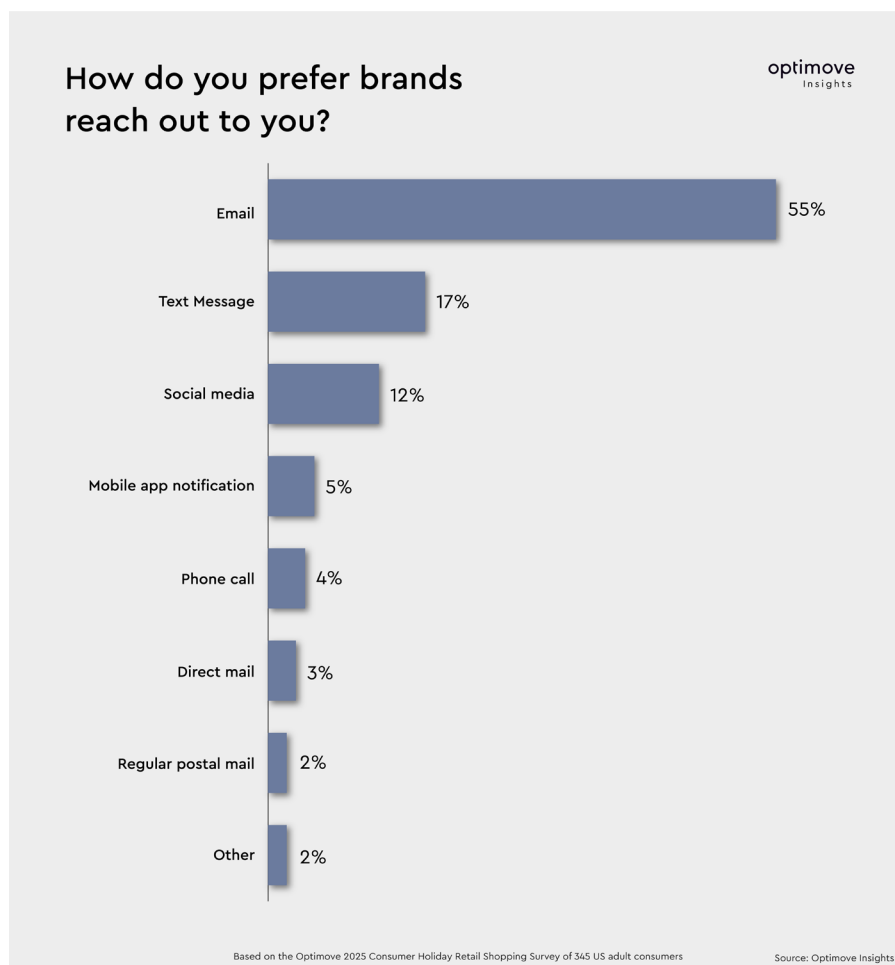


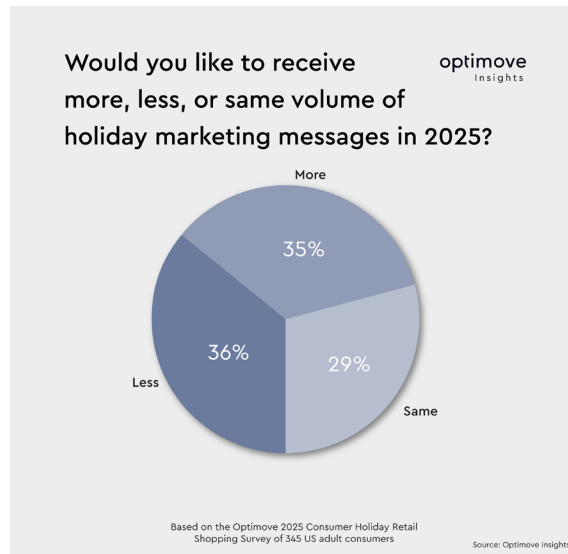
Email Dominates, but Marketing Fatigue is Real

Email remains the top communication channel, with 55% of consumers choosing it as their preferred way to hear from retailers. Text messages are the next most popular option at 17%.

Despite this preference, there are warning signs of marketing fatigue. Sixty-five percent (65%) of consumers say they currently receive the right amount of marketing communication. However, 35% would prefer fewer messages, and 10% feel bombarded. This suggests that **retailers risk alienating more than one-third of their audience if they oversaturate communication channels.**

This concern is reinforced by 36% of respondents who explicitly said they want to receive fewer marketing messages.

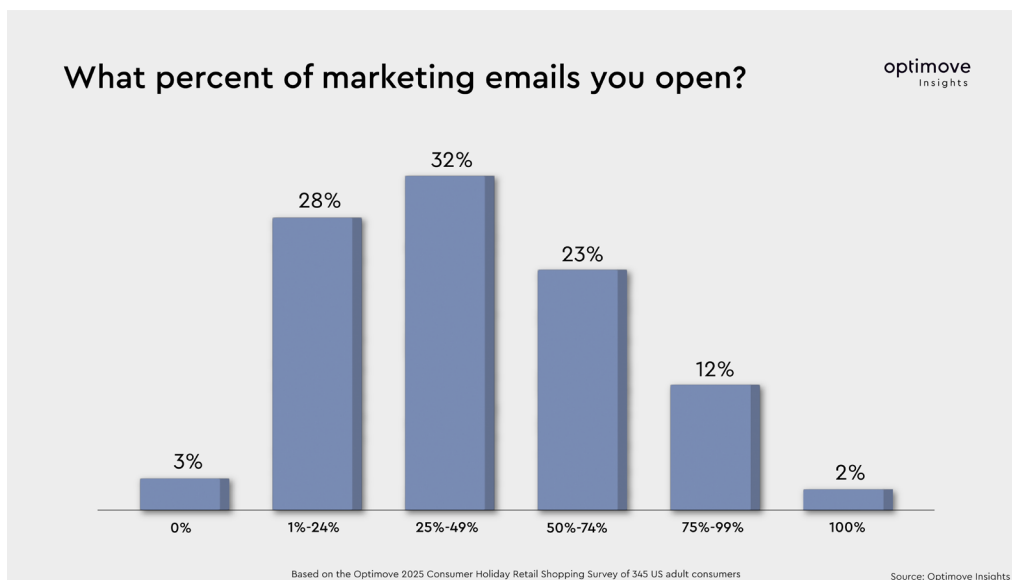


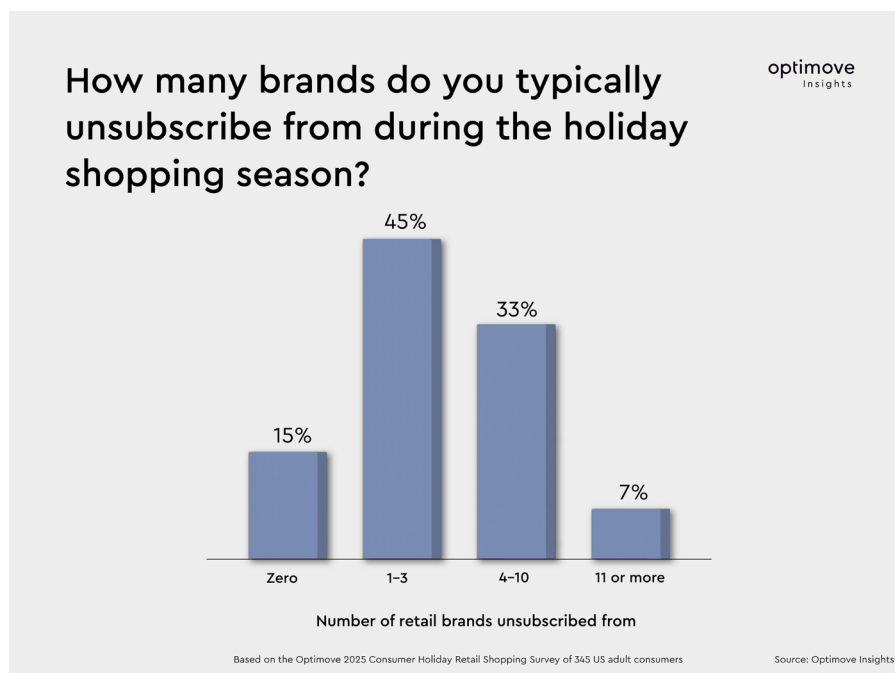
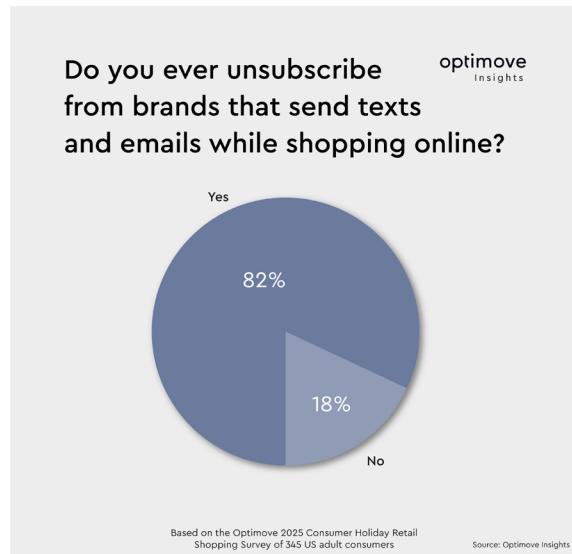
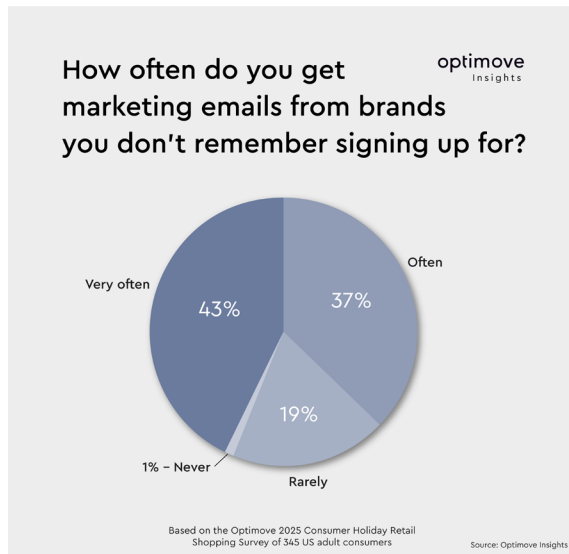


Unsubscribes and Inbox Clutter

In fact, sixty-three percent (63%) of consumers do not open at least half of the emails they receive from brands. Additionally, eighty percent (80%) report receiving emails from brands they do not remember subscribing to.

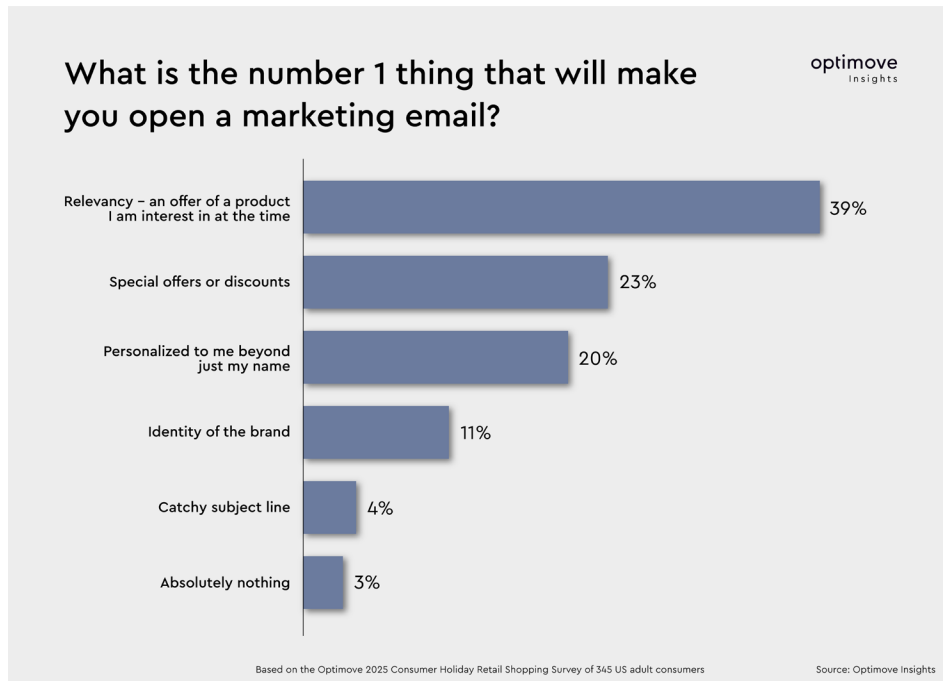
Unsubscribing is common behavior, particularly during the holiday season. More than eight in ten (82%) consumers unsubscribe from brands while shopping online. Forty percent (40%) of respondents unsubscribe from four or more brands during the holidays.





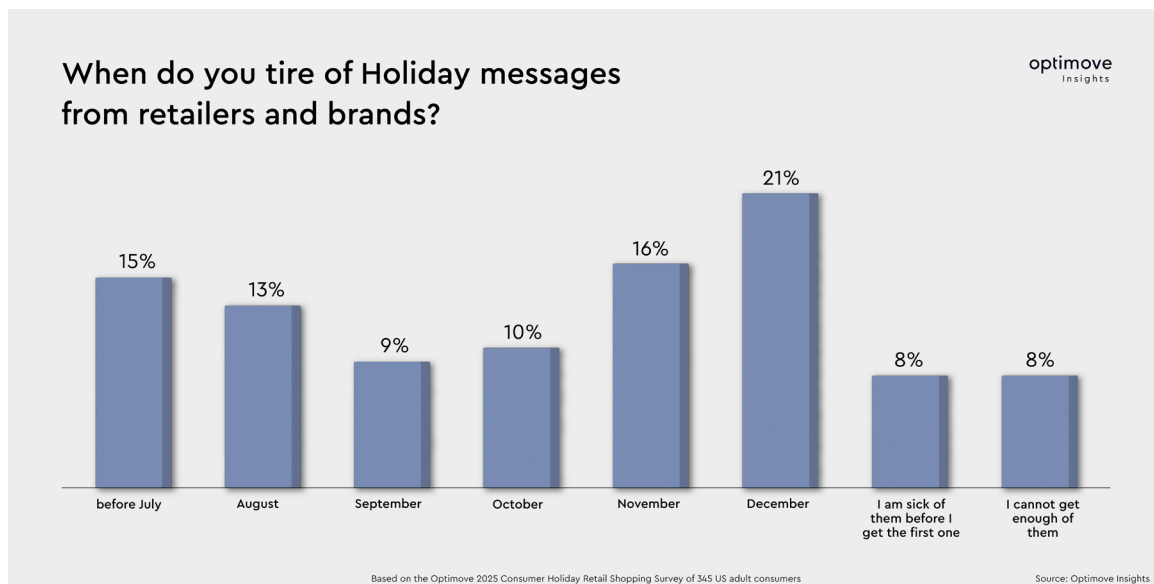
What Drives Engagement?

The top reason a consumer opens an email from a brand is the relevancy of the offer, cited by 39%. Special offers and discounts follow at 23%, while 20% of consumers say they open emails because of personalized messaging. This underscores the importance of using data to deliver content that feels meaningful and timely.



Marketing Fatigue Peaks Early

By October, almost half (47%) of consumers say they are already tired of holiday marketing messages. By the end of November, that number rises to 63%. Retailers must balance early outreach with thoughtful pacing to avoid overwhelming their audiences.



Part 4:

Consumer Shopping Preferences: Holiday 2025

The Optimove 2025 Consumer Holiday Retail Shopping Survey reveals that price sensitivity is at the center of consumer decision-making this season. Shoppers are highly strategic, balancing price, quality, technology, and values when making purchases. This is consistent with consumers' concerns about inflation and tariffs.

Price Sensitivity Leads

Price is the top consideration for holiday shoppers. Sixty-four percent (64%) of consumers said price is more important than service when making purchasing decisions.

Consumers are even more price-sensitive this year than in previous seasons. Eighty-one percent (81%) of respondents said price is the most important factor influencing their shopping decisions, followed by product quality at 72%.



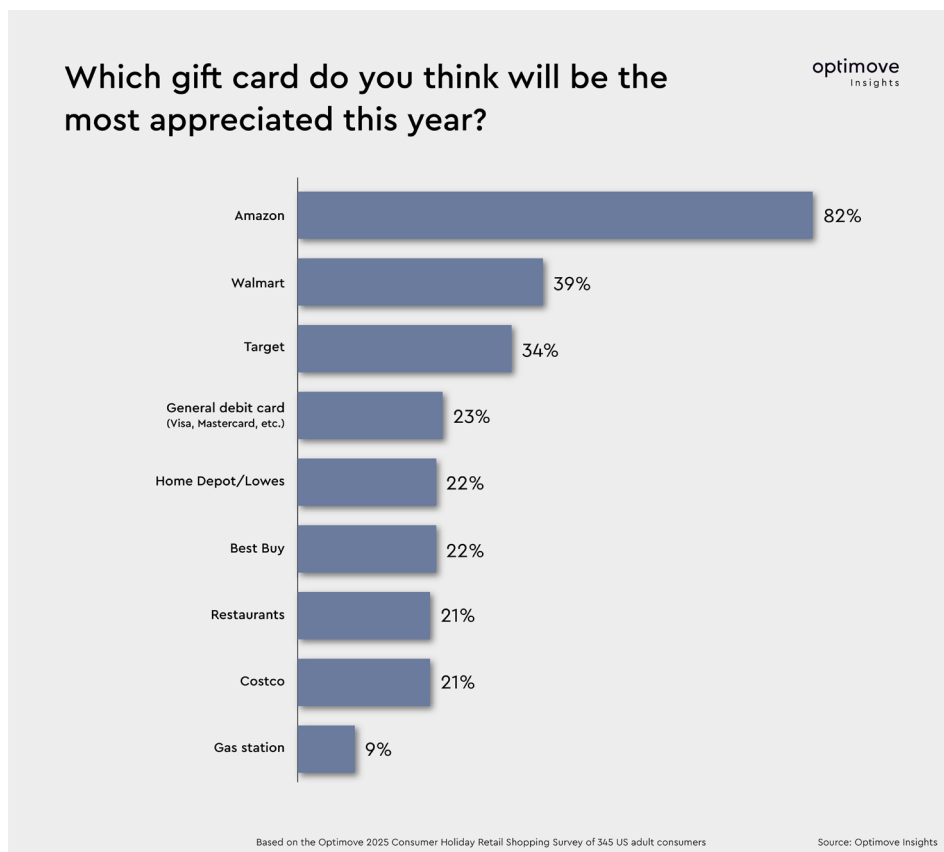
In-Store and Online Price Checking

Today's shoppers are tech-enabled and comparison-driven. Eighty-four percent (84%) of consumers said they check prices online while browsing in physical stores. Forty-four percent (44%) do this very often, highlighting the need for retailers to maintain consistent pricing across channels to avoid losing sales to competitors while customers are standing in-store.



Gift Cards and Retailer Preferences

Gift cards remain a popular choice for holiday shopping. Eighty-one percent (81%) of consumers plan to buy gift cards this season. Among those, Amazon is the clear favorite, with 82% of shoppers selecting Amazon gift cards. Walmart is the second most selected at 39%, followed by Target at 34%.

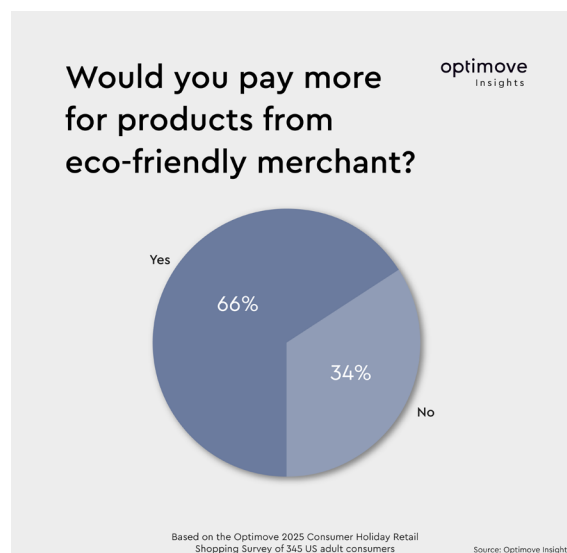
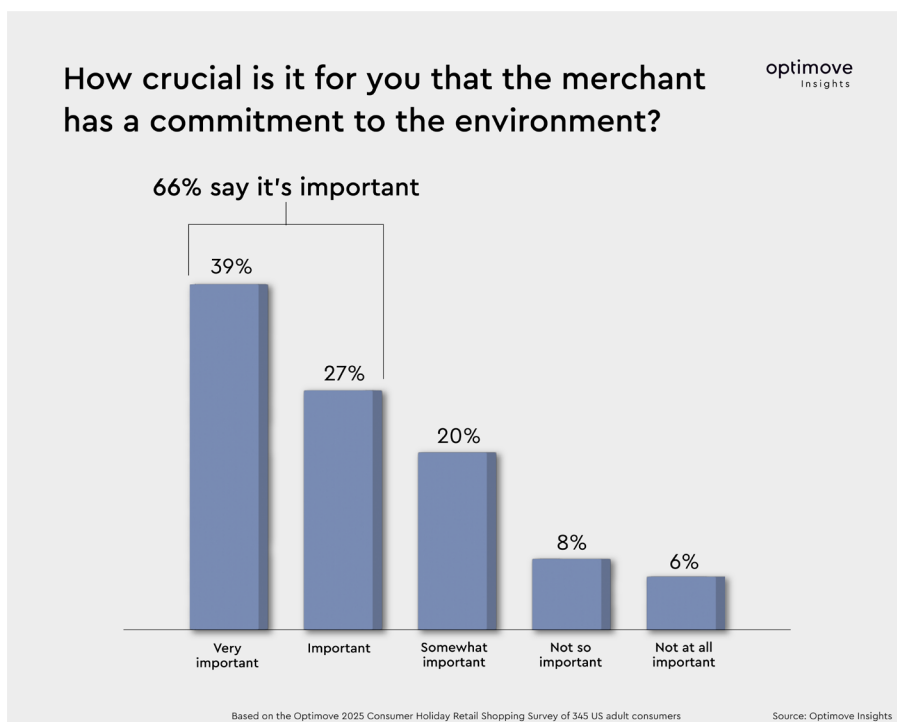


AI is a New Shopping Companion

More than half of consumers (51%) are consulting AI tools for gift ideas. This trend underscores the growing role of generative AI and recommendation engines in shaping holiday shopping decisions.

Environmental Values Matter

Consumers are not just focused on price; they also care about sustainability. Sixty-six percent (66%) of holiday shoppers said it is crucial that a merchant has a commitment to the environment. Plus, sixty-six percent (66%) are willing to pay more for products from eco-friendly merchants.



Additionally, fifty-one percent (51%) said it is important to buy eco-friendly products specifically from brands that demonstrate a broader commitment to environmental responsibility.



Recommendations for Marketers: How to Win Holiday 2025

Based on the findings, marketers should prioritize strategies that enable **speed, personalization, and empathy**. Here are actionable recommendations to help brands succeed this holiday season:

1. Start Early and Stay Relevant

- Launch holiday campaigns well before October to meet consumer expectations for early offers.
- Focus on **relevant, segmented messaging** rather than generic blasts to reduce fatigue.

2. Embrace Positionless Marketing

- Empower your marketing team to act independently. Equip them with tools to analyze data, create content, and launch campaigns without waiting on other departments.
- Remove silos to ensure real-time response to consumer behavior shifts.

3. Personalize With Purpose

- Use enriched customer profiles to go beyond purchase history. Incorporate lifestyle, household, and financial insights to deliver **hyper-personalized experiences**.
- Leverage AI to automate individualized messaging and product recommendations.

4. Manage Marketing Fatigue

- Monitor communication frequency. Avoid causing Marketing Fatigue by overwhelming customers by focusing on **quality over quantity** in your outreach.
- Implement suppression rules and smart frequency caps to reduce opt-outs and unsubscribes.

5. Optimize Omnichannel Journeys

- Ensure seamless coordination between online and offline experiences. Maintain **consistent pricing, messaging, and service across all channels**.
- Use behavioral and identity data to unify the customer journey from first touchpoint to purchase.

6. Lead With Value and Ethics

- Highlight promotions and discounts clearly, but also communicate brand values, especially around **sustainability and social responsibility**.
- Consumers are looking for both **deals and alignment with their personal values**.

7. Use AI for Smarter Engagement

- Integrate AI tools for **gift idea recommendations, predictive modeling, and journey orchestration**.
- AI can help marketers react in real time and optimize campaigns continuously throughout the season.

Final Thought

In Holiday 2025, marketing success will go to the brands that combine **speed, empathy, and data-driven precision**. Marketers who adopt Positionless Marketing, enabled to work across data, creative, and execution without silos, will be best positioned to meet the moment and drive customer loyalty for the long term.

About Optimove

Optimove, the creator of Positionless Marketing, frees marketing teams from the limitations of fixed roles, giving every marketer the power to execute any marketing task instantly and independently. Positionless Marketing has been proven to improve campaign efficiency by 88%, allowing marketing teams to create more personalized engagement with existing customers.

Optimove is recognized as the Visionary Leader in Gartner's Magic Quadrant for Multichannel Marketing Hubs. Being a visionary leader is a hallmark of Optimove. It was the first CRM Marketing Platform to natively embed AI with the ability to predict customer migrations between lifecycle stages in 2012. Today, its comprehensive AI-powered suite is at the leading edge of empowering marketers to optimize workflows from Insight to Creation and through Orchestration.

Optimove provides industry-specific and use-case solutions for leading consumer brands globally.

For more information, go to [Optimove.com](https://www.optimove.com)

About Optimove Insights

Optimove Insights is the analytical and research arm of Optimove, dedicated to providing valuable industry insights and data-driven research to empower B2C businesses.