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Adobe: U.S. Holiday Shopping Season to Cross $250 Billion Online, Rising 5.3% YoY

- **Cyber Week is expected to drive 17.2% of overall spend this season ($43.7 billion, up 6.3% YoY) with competitive discounts across major categories, and Black Friday growth is set to outpace Cyber Monday.**
- **Buy Now Pay Later is expected to drive an additional $2 billion in online spend this season, as consumers seek greater flexibility in managing their budgets.**
- **Online shopping behaviors are being reshaped by generative AI, as consumers embrace AI-powered chat services and browsers to research products and find the best deals.**

SAN JOSE, Calif. — Oct 6, 2025 — Today, Adobe (Nasdaq:ADBE) released its online shopping forecast for the 2025 holiday season, covering the period from Nov. 1 to Dec. 31, 2025. Based on Adobe Analytics data, the analysis provides the most comprehensive view into U.S. e-commerce by analyzing direct transactions online, covering over 1 trillion visits to U.S. retail sites, 100 million SKUs and 18 product categories. Adobe Analytics is part of Adobe Experience Cloud, relied upon by the majority of the top 100 internet retailers in the U.S.* to deliver, measure, and personalize shopping experiences online.

2025 holiday season to surpass $250 billion online

Adobe expects U.S. online sales to hit **$253.4 billion** this holiday season (Nov. 1 to Dec. 31, 2025), which represents **5.3% growth** year-over-year (YoY). A record 10 days will see consumers spend over $5 billion in a single day (up from 7 days last year). Cyber Week (the 5-day period including Thanksgiving, Black Friday and Cyber Monday) is expected to drive **17.2%** of overall spend this season, at $43.7 billion (up 6.3% YoY).

Cyber Monday will remain the biggest online shopping day of the season—and year—at **$14.2 billion** (**up 6.3% YoY**). However, Black Friday is expected to see higher growth this season, rising **8.3% YoY** at **$11.7 billion**. On Thanksgiving, consumers are expected to spend $6.4 billion online (up 4.9% YoY).

Mobile devices will cement its position as the dominant shopping platform this season, set to drive a record **56.1% share** of online spend (vs. desktop shopping). This represents $142.7 billion, up 8.5% YoY. The shift towards mobile shopping has greatly accelerated in recent years: During the 2020 holiday season, mobile accounted for just 40% of online spend.

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Buy Now Pay Later to drive an additional $2 billion

Consumers are looking for greater flexibility in managing their budgets this holiday season, with Buy Now Pay Later (BNPL) expected to drive **$20.2 billion** in online spend (up 11% YoY). This is roughly $2 billion more than the 2024 holiday season, when BNPL drove $18.2 billion in online spend. BNPL usage on Cyber Monday is expected to hit a new milestone and cross $1 billion ($1.04 billion, up 5% YoY). Usage on Black Friday is set to be strong as well, with significant YoY growth ($761.8 million, up 11% YoY). The vast majority of BNPL spend is set to come through mobile devices this season at 79% share (vs. desktop), representing $15.6 billion (up 8.3% YoY).

Competitive discounts expected this season as retailers compete for dollars

Adobe expects significant discounts this holiday season–up to **28% off listed price**–that are on par with the 2024 season. Discounts for electronics are expected to peak at 28% off listed price (vs. 30.1% in 2024), while discounts for toys are set to hit 27% (vs. 28%). Competitive discounts are also expected in apparel at 25% (vs. 23.2%), TVs at 23% (vs. 24.2%), computers at 23% (vs. 22.8%), sporting goods at 19% (vs. 19.5%), appliances at 18% (vs. 19.2%) and furniture at 18% (vs. 19%).

The deepest discounts are expected to land throughout Cyber Week, with Cyber Monday being 'last call' for the best deals. Thanksgiving Day (Nov. 27) will be the best day to shop for sporting goods. On Black Friday (Nov. 28), shoppers will see the deepest discounts for TVs, toys, and appliances. And Cyber Monday (Dec. 1) will be the best day to shop for electronics, apparel, and computers.

Consumers are not simply looking for the lowest price this season. Competitive discounts will drive shoppers to **'trade up'** to higher-ticket items in certain categories—allowing individuals to get more value out of their dollar. The share-of-units-sold for the most expensive goods is set to rise by 56% in sporting goods, 52% in electronics, 39% in appliances, 32% in personal care, and 26% in tools/home improvement. The trend reverses in groceries (down 3%) and furniture (down 8%), as shoppers embrace lower priced items in these categories.

Electronics, apparel, and home goods set to drive growth online

Over half (53.7%) of online spend this season will be driven by three categories including electronics ($57.5 billion, up 4% YoY), apparel ($47.6 billion, up 4.4% YoY) and furniture ($31.1 billion, up 6.5% YoY). Smaller categories (on a spend basis) that are seeing higher growth include groceries ($23.5 billion, up 9.2% YoY) and cosmetics ($8.4 billion, up 9.1% YoY).

Adobe expects an uptick in purchases for the home this season, as consumers take advantage of deals to upgrade their living spaces. Online sales are expected to rise by 1,060% in power tools (vs. average spend levels from Jan-Aug 2025), along with home security products (up 1,050%), TVs (up 915%), refrigerators/freezers (up 910%), and smart home devices (up 615%).

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Health monitoring is another growth area this season, with online sales of activity trackers set to rise 1,055%, along with smartwatches (up 950%) and other bio-monitors (up 385%). Additionally, Adobe expects strong growth in the gaming category, with online sales expected to surge in consoles (up 1,040%), games (up 830%), and accessories (up 820%).

Hot sellers this season are expected to include gaming consoles such as Nintendo Switch 2, Sony PlayStation 5, and Xbox Series X, along with games such as Donkey Kong Bananza, Elden Ring: Nightreign, Madden NFL 26, NBA 2k26, EA Sports FC 26, and Call of Duty: Black Ops 7. **Top selling toys** are expected to include Disney Stitch Puppetronic, Labubu Dolls, MrBeast Lab Toys, Fisher-Price Little People, LEGO sets, and Mini Brands Capsules. Other hot sellers this season include iPhone 17, Google Pixel 10, Samsung Galaxy S25, Oura Ring 4, Kindle Colorsoft, DJI Osmo Pocket 3, and Dyson Airwrap Multi Styler.

Online shopping behaviors influenced by generative AI and social media

- AI-powered shopping: Generative AI-powered chat services and browsers are changing how consumers act online, becoming a helpful assistant for compiling research before making a purchase. Adobe observed the first material surge in AI traffic to U.S. retail sites (measured by shoppers clicking on a link) during the 2024 season, with traffic increasing 1,300% YoY. For the 2025 season, Adobe expects AI traffic to rise by 520% YoY, peaking in the 10 days leading up to Thanksgiving. Additionally, AI services are expected to be used most for categories including toys, electronics, jewelry, and personal care. In an Adobe survey of 5,000 U.S. consumers**, over one-third report having used an AI-powered service for online shopping, with top use cases including research (per 53% of respondents), product recommendations (40%), finding deals (36%), and gift inspiration (30%).

- Social influence: Advertising across social media platforms is expected to be a substantial growth driver this holiday season. Its share of online revenue (purchases attributed to social traffic) is expected to rise by 51% YoY—a significant increase from the 2024 season where growth was at 5% YoY. In affiliates and partners—which includes social media influencers—the growth is also notable at 14% YoY. While major channels such as paid search and email continue to be reliable drivers of traffic and sales online, consumers are increasingly turning to social media to discover and learn about new products.

About Adobe

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*Per the Digital Commerce 360 Top 500 report (2024)
**Consumer survey fielded from September 9th - 16th, 2025