tapcart

The 2026 BFCM Data Report

What 1,205 (Surveyed) Shoppers Want and the Moves To Win Peak Season

Backed by Top Ecommerce Platforms:

yotpo. Triple Whale attentive REBUY

Quickfire AVEX SIMPLE BUNDLES recharge

Every year, *BFCM* arrives with the same anxious question... *will shoppers actually show up?*

This year, the data puts it to rest. 99% say they're likely to shop and 42% plan to spend more than last year.

So demand isn't the problem.

The problem is that how, when, and where people buy has quietly shifted underneath the brands still running last year's playbook — and the ones who don't adjust will watch guaranteed demand walk to a competitor who was ready for it.

That's what this report is built to fix.

We surveyed 1,205 mobile holiday shoppers to find out how they'll actually buy this peak season and we didn't stop at the data. Every finding comes paired with a clear "move": not just what shoppers are doing, but what to do about it.

Because this year, winning peak season won't come down to whether shoppers spend.

It'll come down to whether you're ready when they do.

The *Four Big Shifts* Defining BFCM This Year

Demand is not the problem. Capturing it is.

Shoppers are showing up with open wallets, so the brands that win are the ones that remove friction and meet the high-intent shoppers where they already are.

AI shopping hits its inflection point.

Shoppers are forming opinions with AI before they ever reach your site, which makes being the product it recommends a real advantage.

The calendar moved. BFCM is the finish line, not the starting gun.

Most brands are still building their promo calendars for a rush that's largely already happened by the time it arrives.

A mobile app is now expected, but keeping shoppers engaged is the hard part.

The advantage isn't just getting the install. It's giving shoppers a reason to stay, through loyalty, early access, and content they can't get anywhere else.

Chapter 1
Who Your *Highest Value Shoppers* Really Are

Demand is guaranteed this BFCM. The advantage goes to the brands that know which shoppers are worth the most, and why it has almost nothing to do with age.

Demand is *guaranteed*. Now what?

99% of shoppers are planning to shop BFCM 2026

For four straight years, ~7 in 10 shoppers have been "highly likely" to shop BFCM. Peak season demand is one of the most stable, dependable numbers in ecommerce. Which means the brands that win aren't the ones fighting to create demand. They're the ones ready to capture it.

They're showing up *and* spending more

42% expect to spend more this BFCM

13% expect to cut back on spending

The Move

This BFCM, there's more wallet available per shopper. Capture it with bundles, upsells, and higher-AOV offers instead of leading with margin-eroding discounts.

The pullback crowd is worried about *prices*, not tariffs

Among the small group planning to cut back on BFCM spending this year, *40% blame high prices and inflation*, while tariffs are only a driver for about 9% of shoppers.

Prices/inflation is cited 2x more than any other reason for cutting back.

Demand is not the constraint this year, so resist building your whole strategy around defensive discounting.

The bigger question is *which shoppers are worth the most*, and that comes down to mindset more than money.

Where the Spending Actually Concentrates

These three groups intend to spend more this BFCM than last year:

53% of Gen-Z shoppers

49% of Milennial shoppers

63% of Luxury shoppers

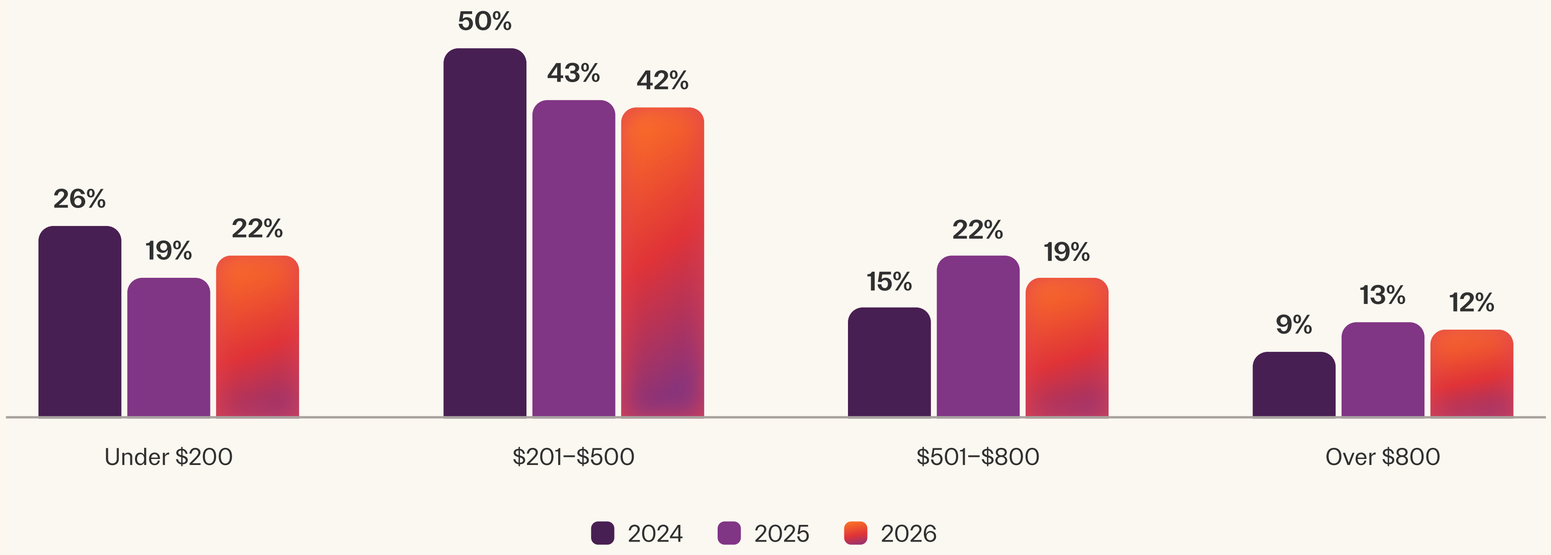
The middle drives volume. The *top drives upside.*

Roughly 2/3 of shoppers spent between $100 and $600 last BFCM, making the middle of the spending curve the volume opportunity. But high-intent, luxury, male, and “love-to-shop” audiences are more likely to stretch into the $1,000+ tier.

The Move

Average spend is healthy, but the upside lives in the high tier. Identify and cultivate the $1,000+ cohort with premium, high-AOV offers. That's where a single won customer is worth many average ones.

Money budgeted during BFCM



Luxury shoppers are *the blueprint*

If you want to see where high-value commerce is heading, watch luxury shoppers. They don't just spend more. They shop across more channels and adopt emerging behaviors first, which makes them the clearest blueprint for the high-intent customer every brand is trying to win.

Across nearly every channel and feature we measured, luxury buyers led the pack.

Luxury shoppers live in *brand apps*

68% of luxury shoppers plan to buy through a brand's mobile app during BFCM, well ahead of every other category (54% to 58%).

The Move

If you sell premium or considered products, your app isn't a "nice to have," it's where your best customers *expect to shop*.

Prioritize a fast, polished app experience and treat it as your *flagship storefront*, not a secondary channel to the website.

Other meaningful insights about *BFCM luxury shoppers*:

Emerging channels are mainstream for them.

54% shop through social (versus as low as 32%), and 42% plan to join live shopping events, with half having already bought during a livestream.

They expect a premium, curated experience.

Luxury shoppers are the most responsive to personalized recommendations (65%), gift guides (65%), early access and VIP offers (51%), and push notifications (51%).

They value loyalty and respond to social proof.

60% call loyalty rewards "extremely important," and social advertising lands harder here than anywhere else, with an Instagram ad motivating 47% of luxury shoppers versus 23% overall.

How your *best shoppers actually buy*

What makes your best shoppers valuable isn't just what they spend, it's *how* they buy: fast, app-first, AI-assisted, and loyalty-driven.

They shop with AI.

45% of love-to-shop shoppers are very likely to use AI this BFCM, so make sure your products are the ones it recommends.

They commit early.

38% download a brand's app immediately, before they're "loyal," so don't gate access behind repeat purchases.

They actually read push.

39% look at push notifications all or most of the time, so a well-timed, high-signal push genuinely lands with this group.

They're driven by loyalty.

61% call loyalty rewards extremely important, so reward them with points, tiers, and exclusives, not just discounts.

The Move

These four behaviors are the levers behind every play in the audience playbook that follows. Pull them, and you don't just capture a high-value shopper for one weekend. You set up a relationship that pays off all year.

Partner Feature

Agencies are already building around this. 1r Agency has moved clients away from blasting one offer to the whole list and toward segmenting existing customers by purchase frequency, category, and order value, and they're seeing 15 to 20% higher AOV and healthier lists as a result.

Partner Insight

As their Head of Lifecycle Marketing puts it:

"Stop treating your best customers like your most hesitant ones. *They're not the same shopper*."

Once you can see them that way, you can treat each group on its own terms.

Katherine Hans
Head of Lifecycle Marketing

The *Bottom Line*

The takeaway from this chapter is simple: your most valuable shoppers aren't defined by age. They're defined by intent, behavior, and category.

Match the play to the shopper:

High-intent and love-to-shop:

Early access, drops, loyalty perks, and app exclusives. This is where urgency and merchandising actually convert.

Luxury power shoppers:

personalized recommendations, VIP treatment, social proof, and trust cues, delivered across app, social, and live.

Price-sensitive:

Clear discounts, free-shipping thresholds, and transparent costs.

Need-only:

Practical value, simple offers, and low-friction checkout.

One principle ties it all together:

Don't discount your best shoppers like your most hesitant ones. The cutback crowd is a small, price-driven minority, while the majority is spending the same or more.

Resist the urge to discount-bomb the whole list. Concentrate your budget on converting the high-intent, high-AOV cohorts, and protect your margin on the shoppers who were always going to buy.

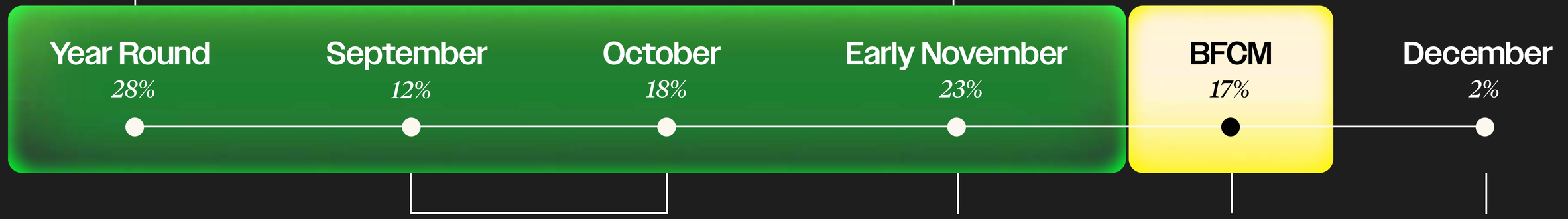
Chapter 2

Shoppers *Aren't Waiting For BFCM To Start*

Black Friday is no longer the starting line. Most shoppers begin weeks earlier, and the brands that show up first win the decision before the discounts even land.

For most shoppers, BFCM is *another time to shop*, not the only one

Around 80% begin before Thanksgiving week.



30% start shopping in September - October
(planning, browsing, list-building)

(comparing, waiting, watching)

Only 17% begin during Thanksgiving/BFCM week.
(buying)

(last-minute gifts, retention)

Partner Feature | attentive®

The last-minute window is shrinking as more shoppers shift from waiting to planning.

Attentive's data shows the same pattern:

71% of shoppers plan to start before Black Friday

UP 20% YEAR OVER YEAR

84% of shoppers expect deals in November or later

September | October | November | BFCM | December

The Opportunity Gap

Demand arrives weeks before shoppers expect a discount. That gap is your window to engage without cutting price.

Partner Feature | attentive®

Partner Insight

Angela Rollins
Sr. Content Marketing Manager

"Holiday demand is *showing up earlier* than the deals. That gap is where brands can build their list, learn what shoppers want, and stay useful *before the inbox becomes a price war.*

Brands that wait until Black Friday to start communicating are *competing for a decision* shoppers have already begun making."

Every year, more of the holiday basket is *"for me"*

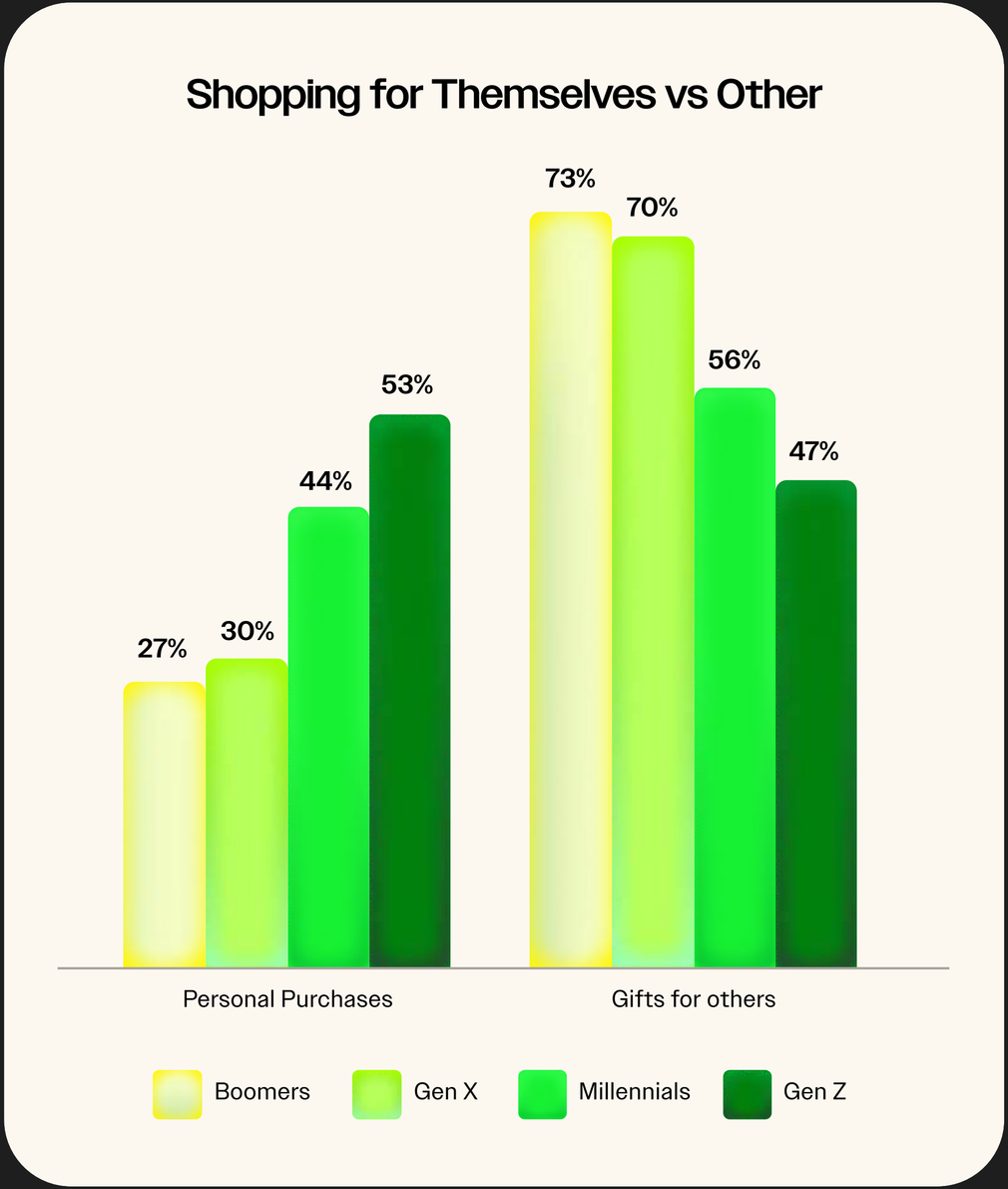
Self-purchasing has risen from 31% to 40% in three years. A holiday merchandising strategy built entirely around gifting increasingly ignores a huge share of the actual buyer motivation.

The Move

Give "treat yourself" and personal-wishlist messaging real space in your campaign, not just gift guides framed around other people.

Gen Z has turned BFCM into permission to *shop for themselves*

53% of Gen-Z holiday purchases are for themselves,
vs. just 27% for Boomers, who still buy mostly for others.

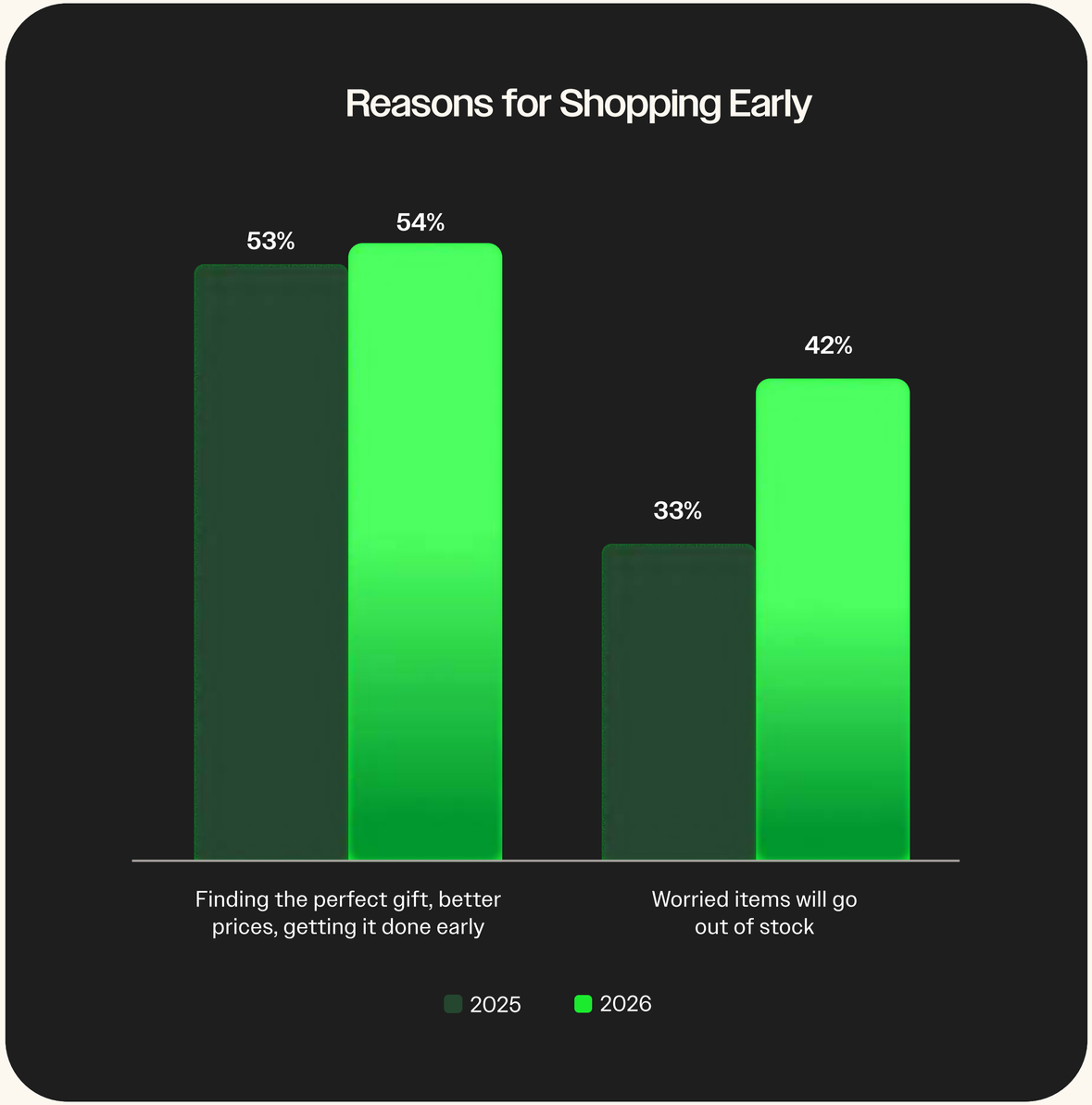


The Move

The classic "perfect gift for someone else" framing misses how younger shoppers actually buy.
Add self-gift guides to reach the cohort spending most of its holiday budget on itself.

Early shoppers are driven by deals and *FOMO*

The top early-shopping reasons cluster tightly (finding the perfect item, better prices, and getting it done early all ~54%), but the fastest-rising one is "worried it'll go out of stock," up from 33% to 42%.



The Move

Scarcity is becoming a legitimate motivator. Use honest inventory signals (low-stock counts, back-in-stock alerts) to capture early intent not fake countdown timers that erode trust.

Partner Feature | Triple Whale

The weekend has four peaks, not one

Across $2.88 billion in tracked BFCM 2025 revenue, Triple Whale found a different peak hour every day, including 3 AM Saturday and 4 AM Sunday spikes that a generic four-day plan misses entirely.

Those overnight weekend peaks are easy to miss if you're only bracing for a repeat of Friday afternoon.

Partner Insight

"The weekend doesn't slow down after Friday. Brands that only watch the daytime hours are *missing half their own demand curve*."

Maxx Blank
Co-Founder and President/COO

The *Bottom Line*

The sale is no longer the start of the season. It's the finish line of a decision shoppers began making weeks earlier. Three ways to get in front of it:

Start earlier

With ~80% browsing before Thanksgiving week, use September and October to build your list and stay useful before the inbox becomes a price war.

Widen the framing

Self-purchasing is now 40% of holiday buying. Pair "find the perfect gift" creative with "treat yourself" messaging.

Use scarcity honestly

Fear of missing out is rising fast, so lean on real low-stock and back-in-stock alerts, not fake countdown timers.

Treat BFCM as a single weekend and you're competing for a decision that's already made. Show up early, and you won't just win the weekend. You'll own the season.

Chapter 3

How Shoppers *Discover With AI*

AI has trimmed the research phase into minutes.
By the time shoppers reach your store, the shortlist is set.
The only question is whether your products made it.

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More than half have already let *AI guide a purchase*

55% of shoppers have used AI successfully in a shopping journey

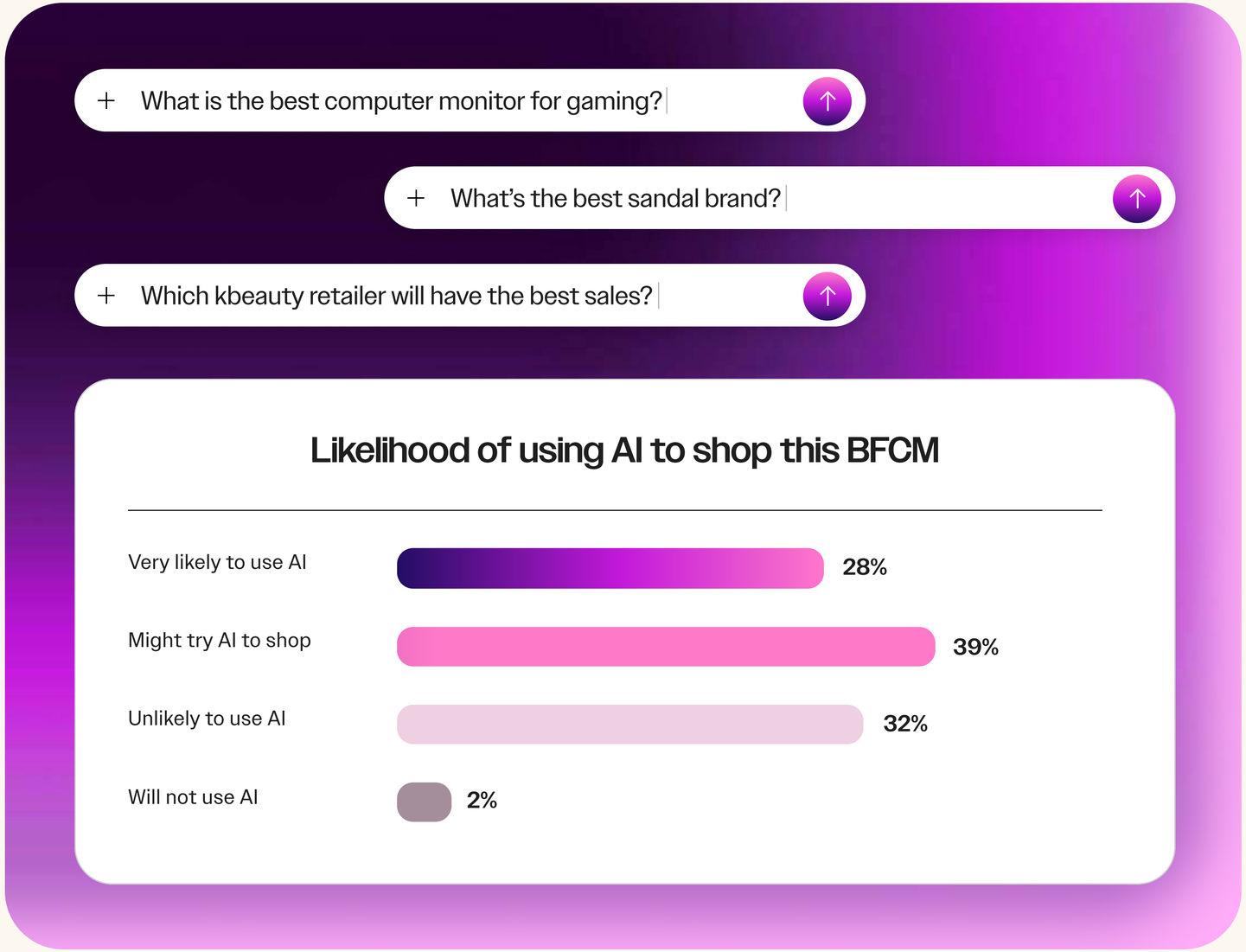
28% bought from an AI recommendation while 27% researched using AI before converting elsewhere. Brands that only attribute value to the last click will underestimate how much purchase consideration is already happening upstream in AI.

Just 8% found AI unhelpful. Adoption sticks once it starts.

Two-thirds plan to *lean on AI* this BFCM

That means product information now has to persuade two audiences: the shopper and the AI system helping that shopper narrow the field.

67% of shoppers are at least open to using AI to shop during BFCM



AI is now on the holiday shopping menu, alongside apps and marketplaces

Online marketplaces and mobile apps still lead planned holiday shopping, but roughly 1 in 4 (26%) now plan to use an AI tool or chatbot — a channel that didn't meaningfully exist a couple of years ago.

The Move

AI has entered the consideration set fast. It won't replace apps or marketplaces this year, but ignoring it means missing a quarter of shoppers who now plan to shop that way.

Planned retailer(s) for online holiday shopping

The barrier now is *adoption, not dissatisfaction*. Almost no one who tries AI comes away unimpressed, which means it will only shape more of the shortlist from here.

By the time a shopper reaches a product page, AI has often compressed days of research across multiple tabs into a few minutes. Many arrive to *confirm and transact*, not to be sold to, which narrows the window where urgency tactics and discovery merchandising still move behavior.

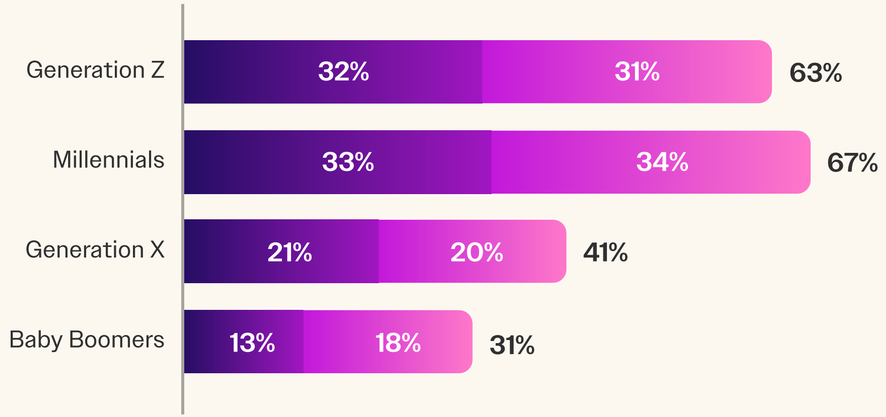
AI shopping is *already mainstream* for shoppers who matter most

Two-thirds of Millennials (67%) and Gen-Z (63%) have found AI useful for shopping, vs. 41% of Gen-X and 31% of Boomers; men (68%) far outpace women (43%).

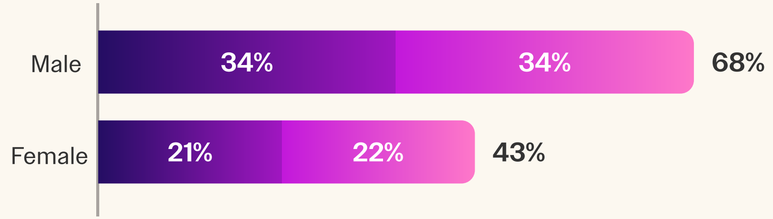
The Move

AI usefulness is ~2x higher for Millennials than Boomers. If these groups matter disproportionately to your revenue, AI visibility deserves disproportionately more attention too.

AI usage – by demographics



Purchase decisions by gender



Yes, but bought through another channel

Yes, purchased based on recommendation

AI adoption is *highest* among your most valuable audiences (younger, male, luxury, and enthusiast shoppers) and highest for considered purchases where people compare before they buy. If that's your customer, *being discoverable in AI isn't optional*.

But discoverability is only half the story, because AI isn't yet where shoppers feel in control.

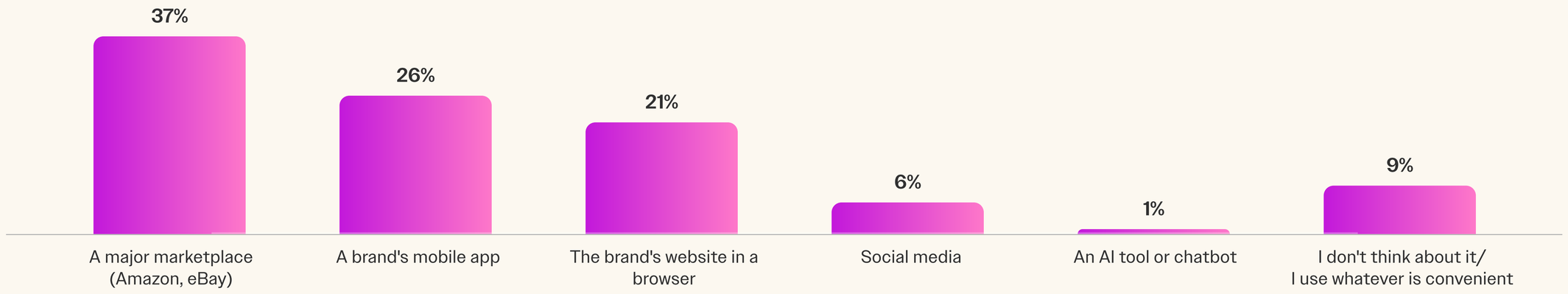
Win the recommendation, then *win the handoff*

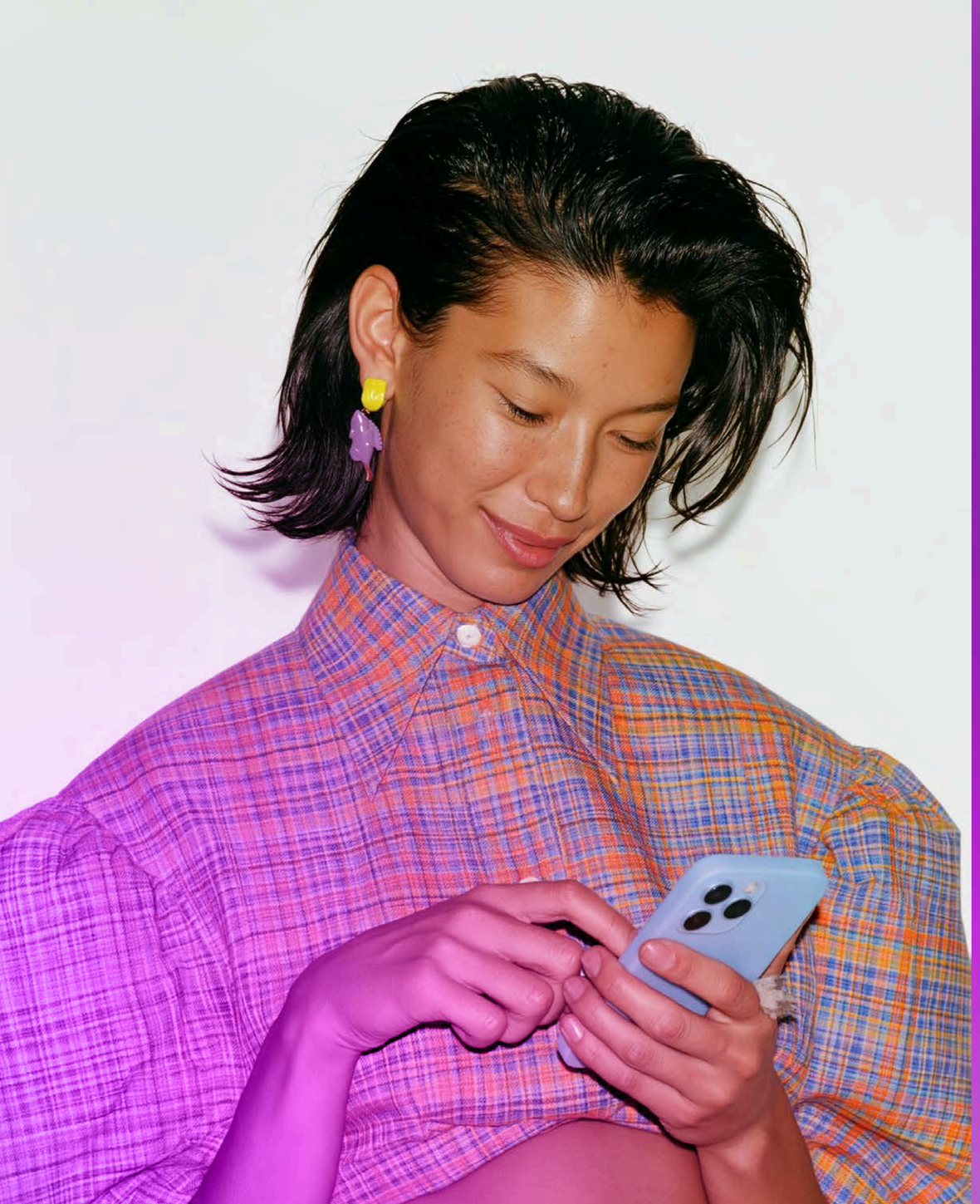
AI may shape what gets shortlisted, but shoppers still feel more comfortable completing the journey on owned and trusted surfaces. AI gets 1% point for making shoppers feel “most in control” while brand apps (26%) and brand websites (21%) make up 47%.

The Move

The job isn't to replace your site or app with AI, it's to make sure your product gets recommended and your landing experience validates that recommendation.

Channel where you feel most in control of shopping experience





Shoppers are comfortable letting AI guide them, *but they still want to buy on a channel they control*. AI is a stepping stone to the sale, not the sale itself, and that handoff is both an opportunity and a risk.

For now, AI is more influential as a *research, comparison, and shortlisting layer* than as the final place of purchase.

Partner Feature | Quickfire

The question this raises is how a brand becomes the product AI recommends in the first place, and the answer is increasingly about data, not copy.

UK-based Shopify agency Quickfire Digital argues that clean, structured product data has become an acquisition channel in its own right: rich taxonomy, complete attributes, and consistent metafields are what let an AI understand, compare, and surface your products when a shopper asks it what to buy.

Partner Insight

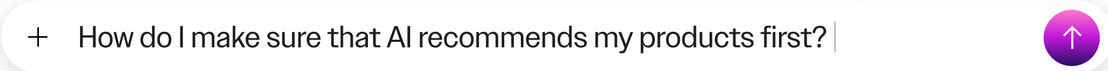
Fred Cohen
Co-Founder

"If you aren't structuring your backend data correctly, you're fighting *a losing battle with AI search engines*. LLMs want structure, not just marketing text."

The *Bottom Line*

For now, AI lives in the *research phase, not the checkout*. Shoppers are using it to *compare, research, and build a shortlist, then handing off to a channel they trust to actually buy*. That means the opportunity this year isn't building an AI checkout. It's making sure *your catalog is the one AI surfaces and recommends* in the first place.

That comes down to the fundamentals: structured product data, rich feeds, and AI-discoverability are the new SEO. The brands that get found in an AI conversation are the ones that show up when a shopper asks it what to buy.



Chapter 4

Where Shoppers Buy: *The Mobile Experience*

Shoppers now expect a brand's app and will download it early. Keeping shoppers engaged is where the real work begins.

More shoppers are *choosing apps* over mobile web, and the gap is widening

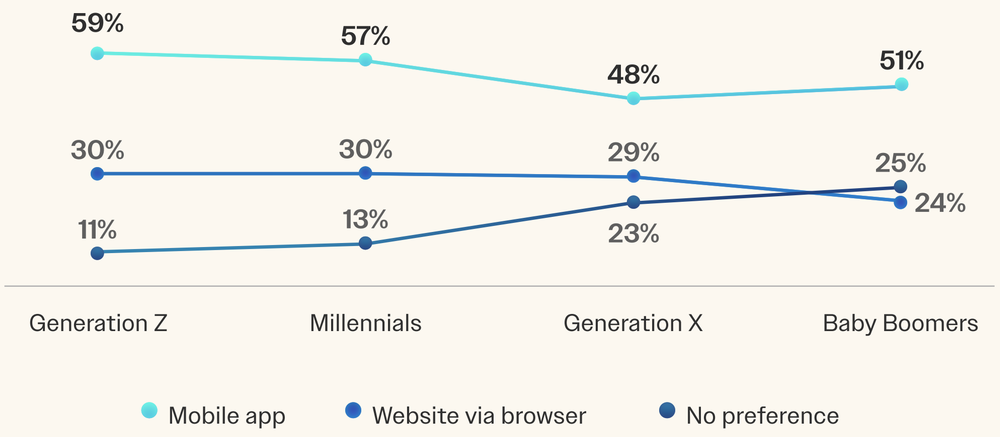
54% now prefer a brand's app on their phone (up from 50%), while browser preference slipped to 29%. App preference is highest among Gen-Z (59%) and Millennials (57%) and declines with age, while "no preference" rises among older shoppers.

Gen Z is the most app-first generation at 59%, but even Boomers reach 51%. The gap is no longer far off between generations.

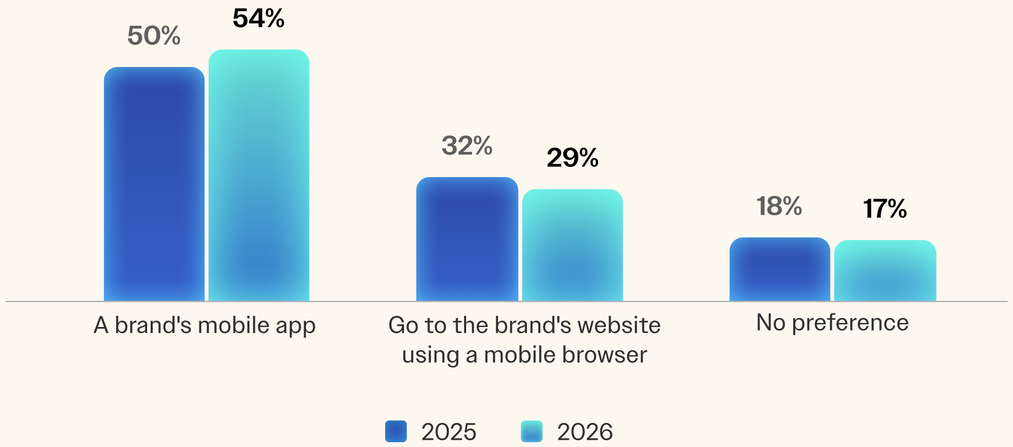
The Move

The shift toward apps is directional, not a blip. Brands without a strong app lose preference a little more every year they wait.

Preferred shopping method – by generation



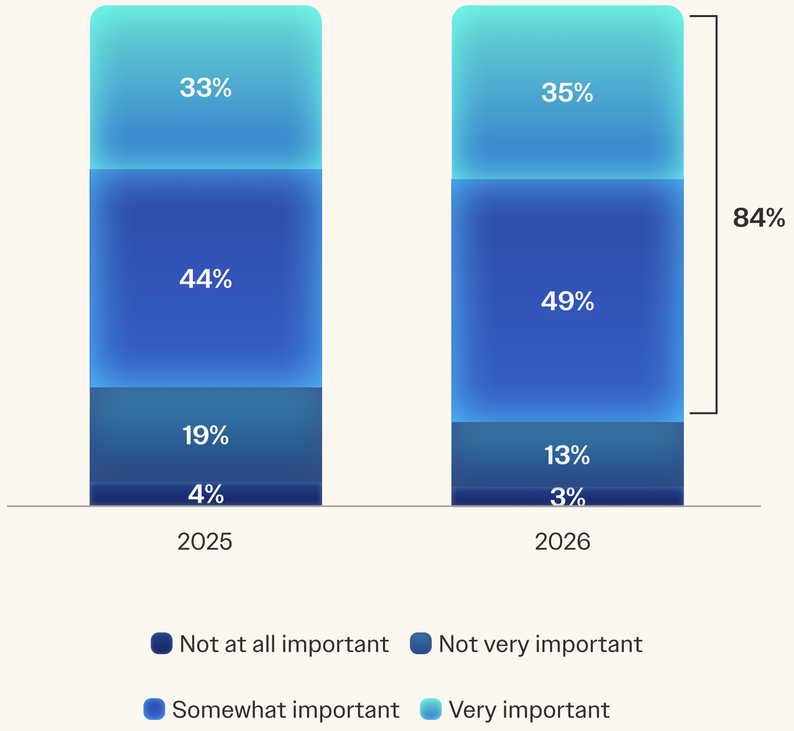
Preferred shopping method on a phone



A brand app went from nice-to-have to *expected* in a single year

84% of shoppers expect their favorite brand to have an app

Importance of a brand's mobile app



App preference isn't a mandate for every brand to build one. It's a *higher bar* your best customers hold their favorite brands to, *expecting an experience* built around the relationship, not a copy of the mobile site.

So the next question is how they find and download those apps in the first place.

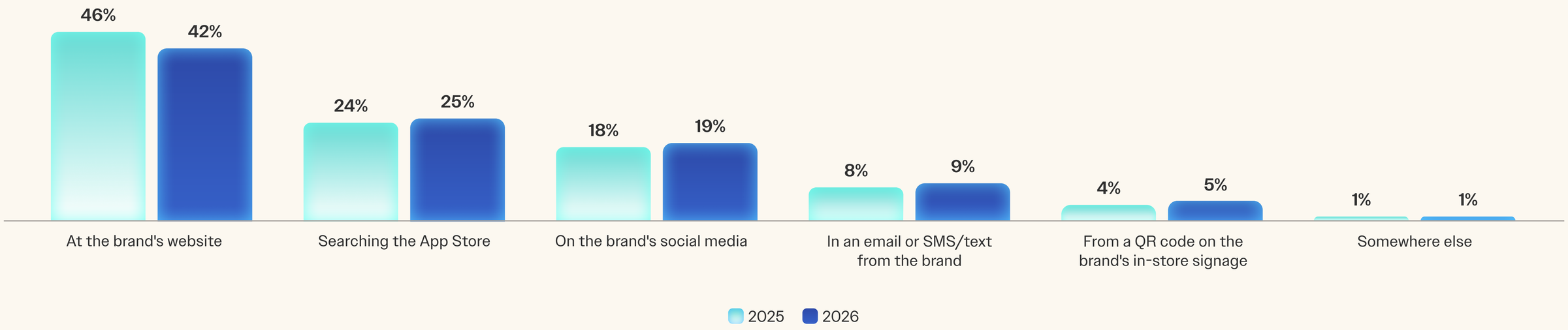
Don't *overthink* app adoption

42% discover brand apps on the brand's own website and 25% in the app store, while email/SMS and in-store QR codes barely register. Website discovery for mobile apps is nearly 5× email/SMS discovery.

The Move

The highest-leverage place to promote your app is the site people already visit. Put persistent, prominent app prompts on your website where intent already exists.

Where mobile shopping apps are discovered

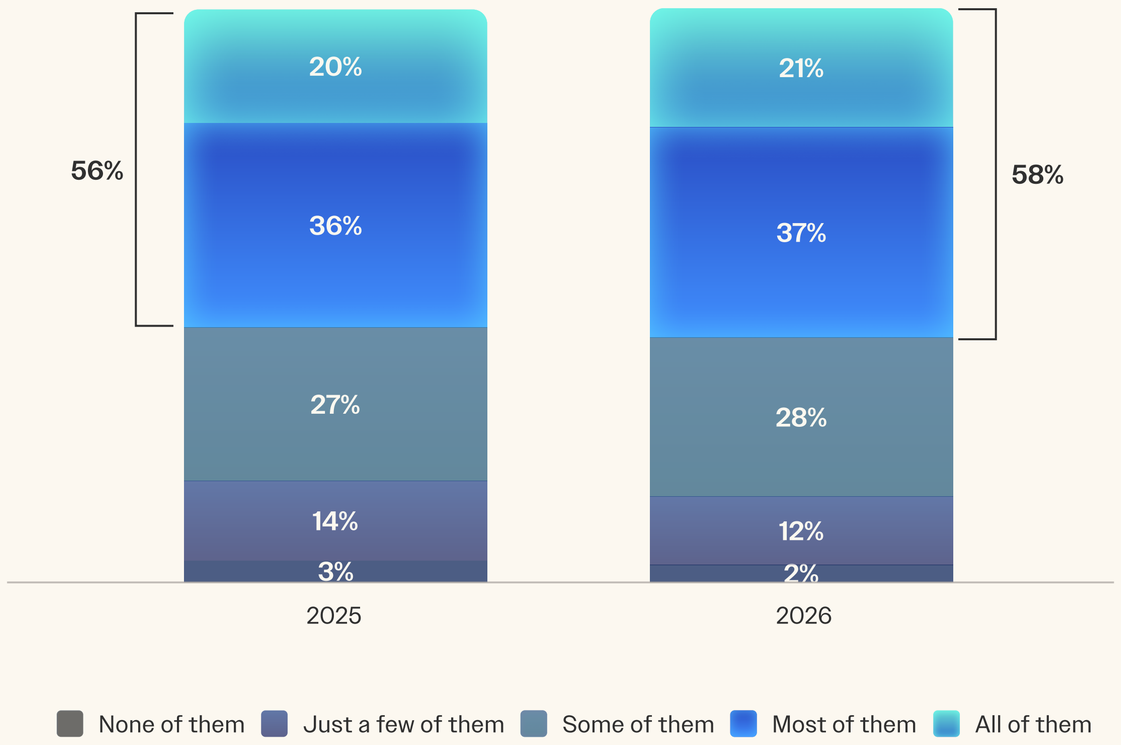


Downloading a brand's app is now *mainstream behavior*

58% of shoppers have downloaded apps for most or all of their favorite brands, and two-thirds download within their first three purchases. Adoption is particularly strong among Gen Z and Millennials, reinforcing that app ownership follows brand affinity more than universal app enthusiasm.

65% of Gen Z and Millennials have apps for most or all of their favorite brands.

Apps downloaded for favorite brands

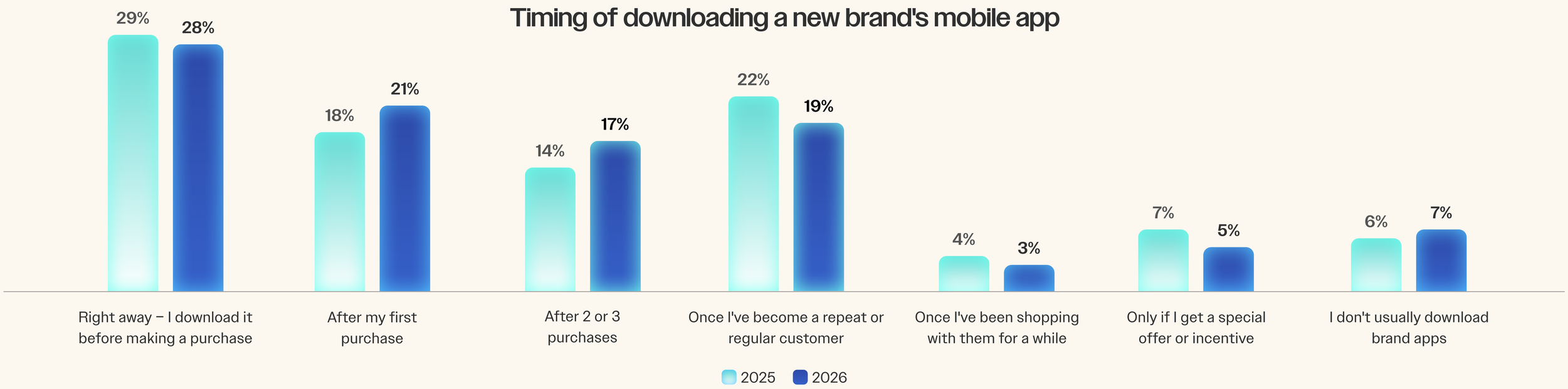


28% download before they've bought anything at all

Two-thirds of shoppers will download a brand's app within their first three purchases, including 28% who will do it before making a purchase at all. The #1 download moment is before the first purchase.

The Move

The app is often part of how shoppers evaluate a brand, not a reward for loyalty. Promote it up front. The biggest window to convert a download opens before the first order, not after the tenth.



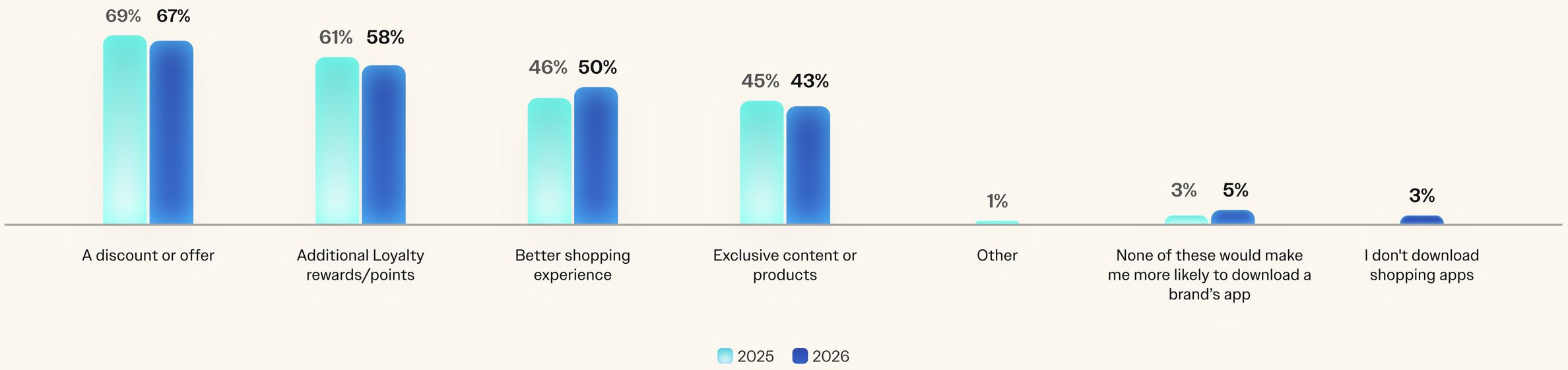
Discounts rent attention. *Loyalty earns permanence.*

Discounts still drive the most downloads, but loyalty rewards alone would move nearly 6 in 10 shoppers to install, no discount required.

The Move

Don't buy every install with a discount. Lead with loyalty and exclusive access to attract shoppers who'll actually stick, not just coupon-chasers who churn.

Benefits that would make respondents more likely to download a brand's app



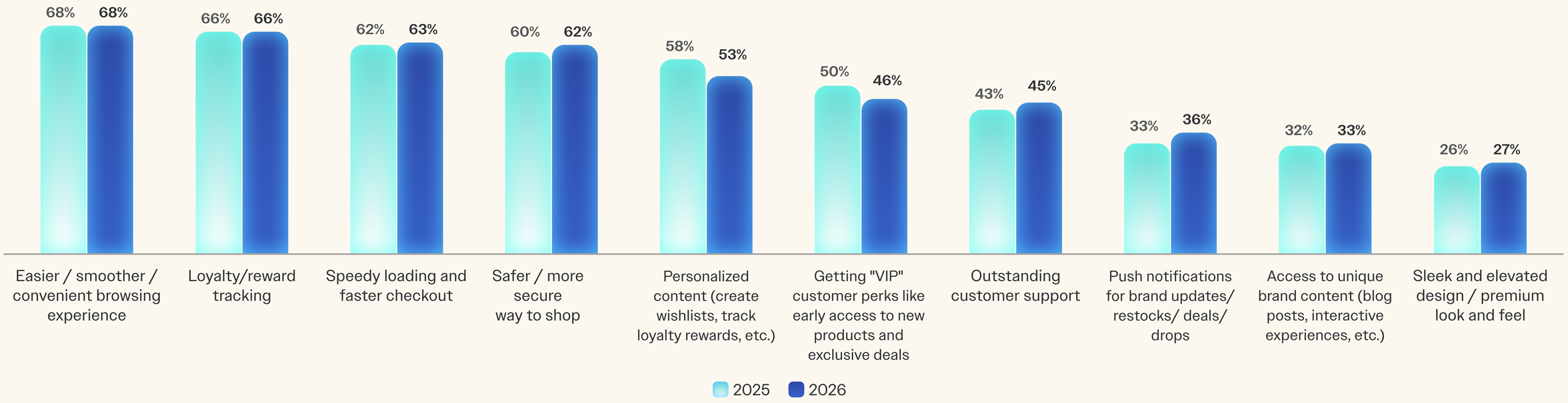
Apps *survive on utility*, not flash

The features that make an app worth keeping are all functional: smoother browsing, loyalty/reward tracking, fast checkout, and security. "Sleek design" and "unique content" rank last.

The Move

Spend your app budget on performance, loyalty visibility, and frictionless secure checkout, not on visual polish. Shoppers keep apps that make buying easier, and delete the ones that are just pretty.

Most beneficial mobile app attributes and features

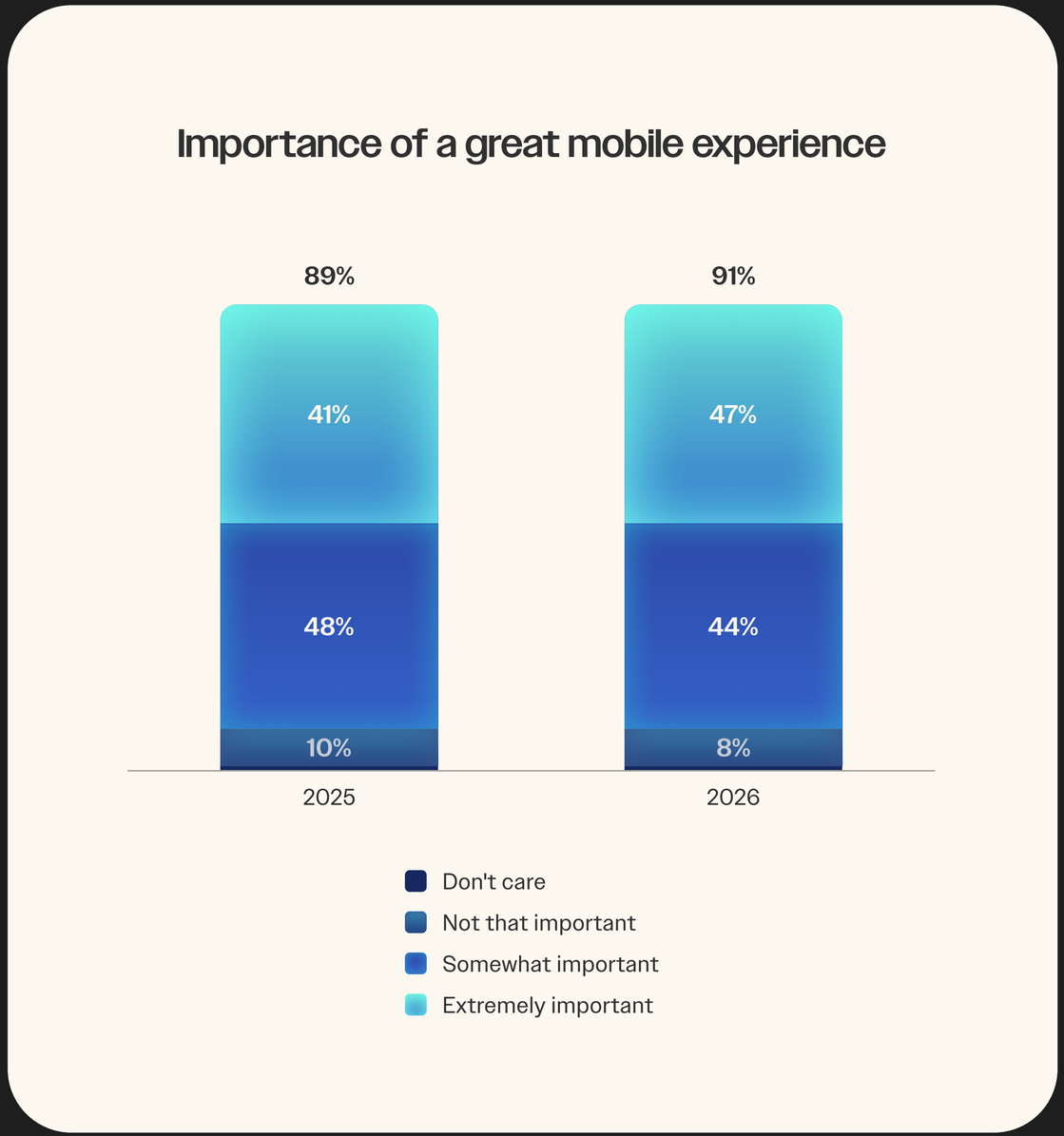


A “good enough” mobile experience is now a *conversion risk*

91% say a great mobile experience matters, and the share calling it "extremely important" jumped from 41% to 47%. That demand spans every group: 94% of Gen-Z, but also 83% of Boomers and 90%+ of both men and women.

The Move

You can't segment your way out of investing in mobile quality. A poor experience penalizes conversion across your entire customer base, not one cohort.



Partner Feature | AVEX

Partner Insight

John Surdakowski
Founder & CEO

"Many brands have sophisticated acquisition machines but underbuilt retention infrastructure. *Mobile is where that gap lives.*

A branded app experience gives your highest-value customers *a reason to come back*, and it gives your team the data and direct communication channels to actually nurture that relationship."

Retention is decided in the *opening minutes*, not months in. The first session needs a real value exchange, a loyalty balance, a personalized feed, an access tier the web doesn't offer, plus a push within 24 hours triggered by what the shopper actually viewed.

Brands that treat that first session as passive browsing *are already behind*: the apps that earn a second one start proving their value in the first.

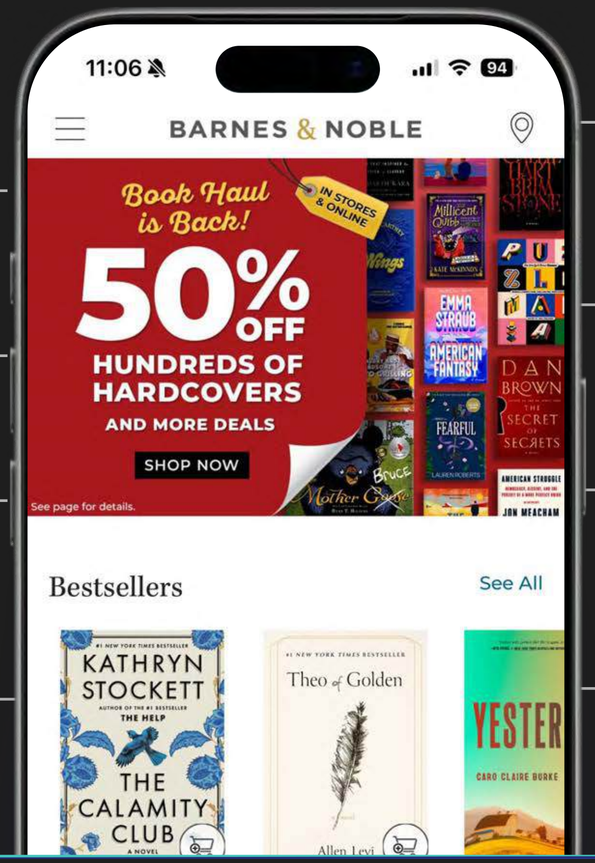
The Anatomy of a *Great Mobile App*

Fast and responsive

Easy to navigate

Push notifications directly on your home screen

Effortless browsing and checkout



Personalized to your preferences

Remembers your history

Superior loyalty and subscription management

App-exclusive deals and products

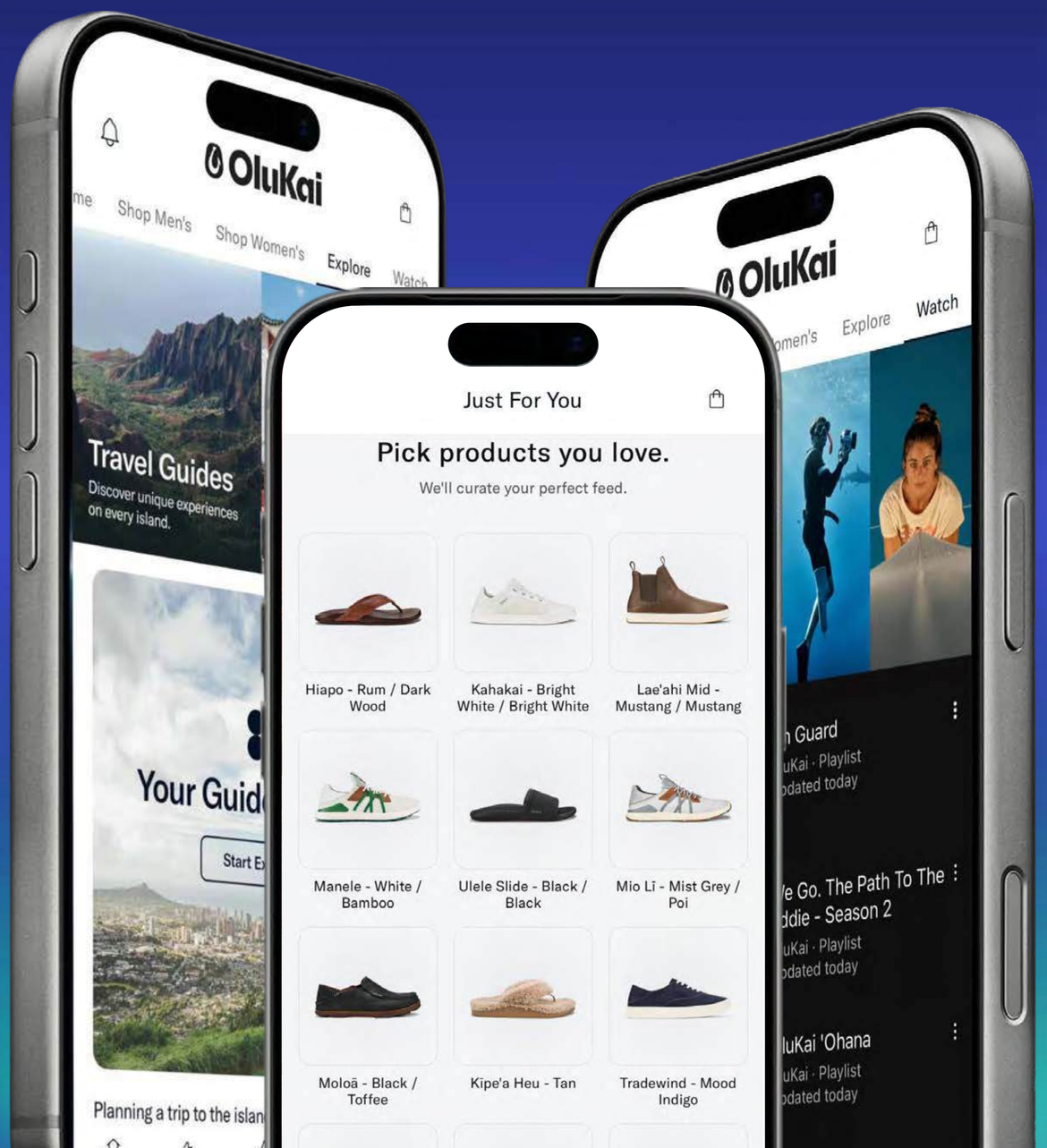
A great app treats your best customers like it knows them, instead of greeting a ten-time buyer with a first-timer's welcome pop-up. That recognition is exactly why trust in brand apps is climbing, and it's exactly what a Tapcart app is built to do out of the box.

Here's what it looks like in practice.

App Feature | Olukai

OluKai's app is *beautifully branded*, but the real standout is its...

- *For You Feed:* an interactive, personalized surface that ranks products, collections, and content uniquely for each shopper. It learns from searches, taps, cart adds, and returns, adapting in real time as they browse.
- *The Watch tab* features original videos of athletes and their journeys, giving shoppers a way to see products in action that goes beyond the standard product video.
- *The Explore tab* goes further, offering travel guides curated by locals for each Hawaiian island. Real content that gives shoppers a reason to open the app between purchases.

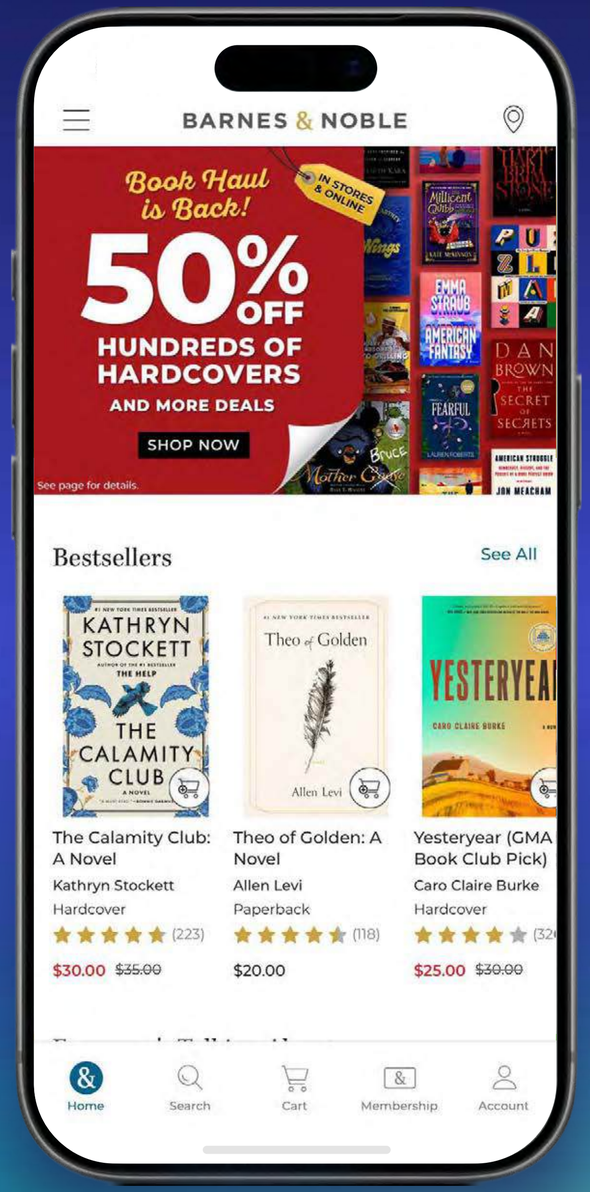


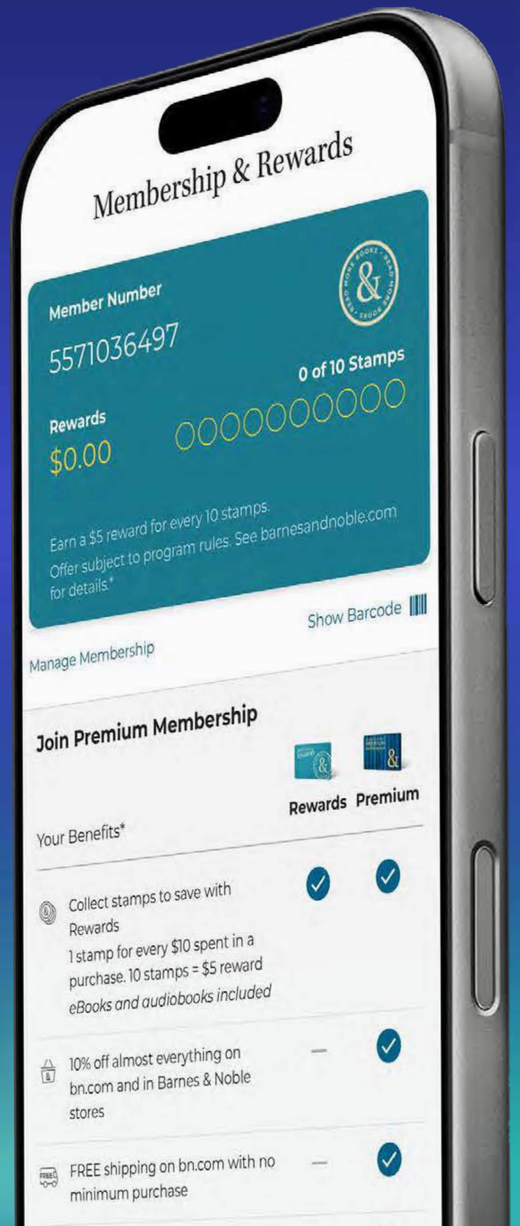
App Feature | Barnes & Noble

Barnes & Noble's app *wins on convenience*, giving shoppers *real reasons to stay*:

- *Store Locator* with interactive maps, store hours, and geolocation
- *Scannable Digital Membership Card* with full tier logic for Rewards, Premium, Bookseller, and Legacy members
- *Reserve Online, Pick Up In Store (ROPIS)*: reserve from the product page, finalize in store, no online payment required
- *Gamified Stamp Loyalty* tracked across Account, Cart, and Checkout
- *Dynamic Mega Menu* that auto-updates across their full product catalog

Every feature reinforces the same idea: convenience is the loyalty play.

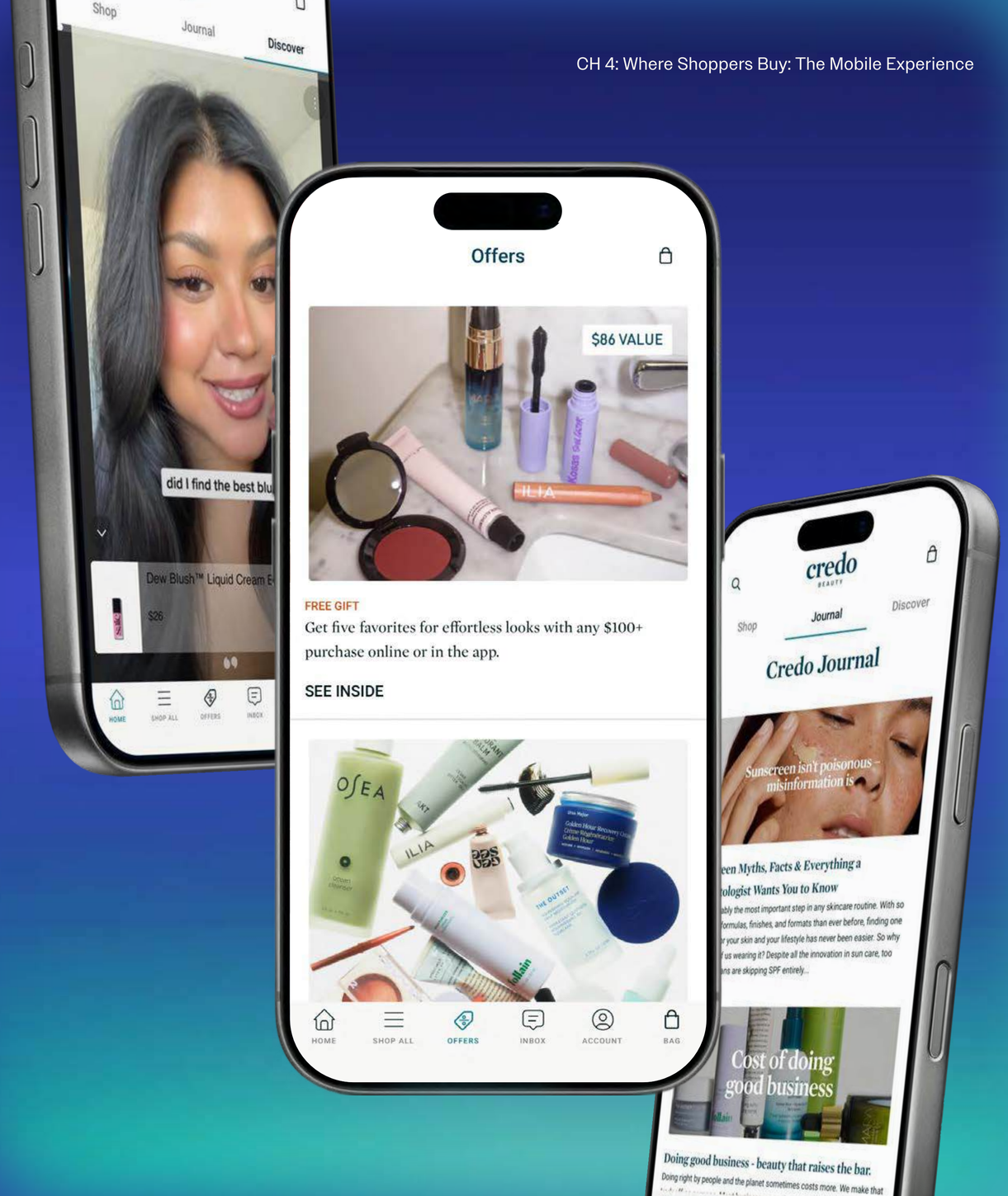




App Feature | Credo Beauty

Credo keeps its audience close with a dedicated Offers tab that surfaces every live deal in one place. No more digging through emails or social posts.

- *The Journal tab* delivers educational, how-to skincare content, from sunscreen myths and facts to everything a dermatologist wants shoppers to know.
- *The Discover tab,* powered by Tolstoy, mirrors a TikTok Shop-style feed, giving app users a format they already know how to use



The *Bottom Line*

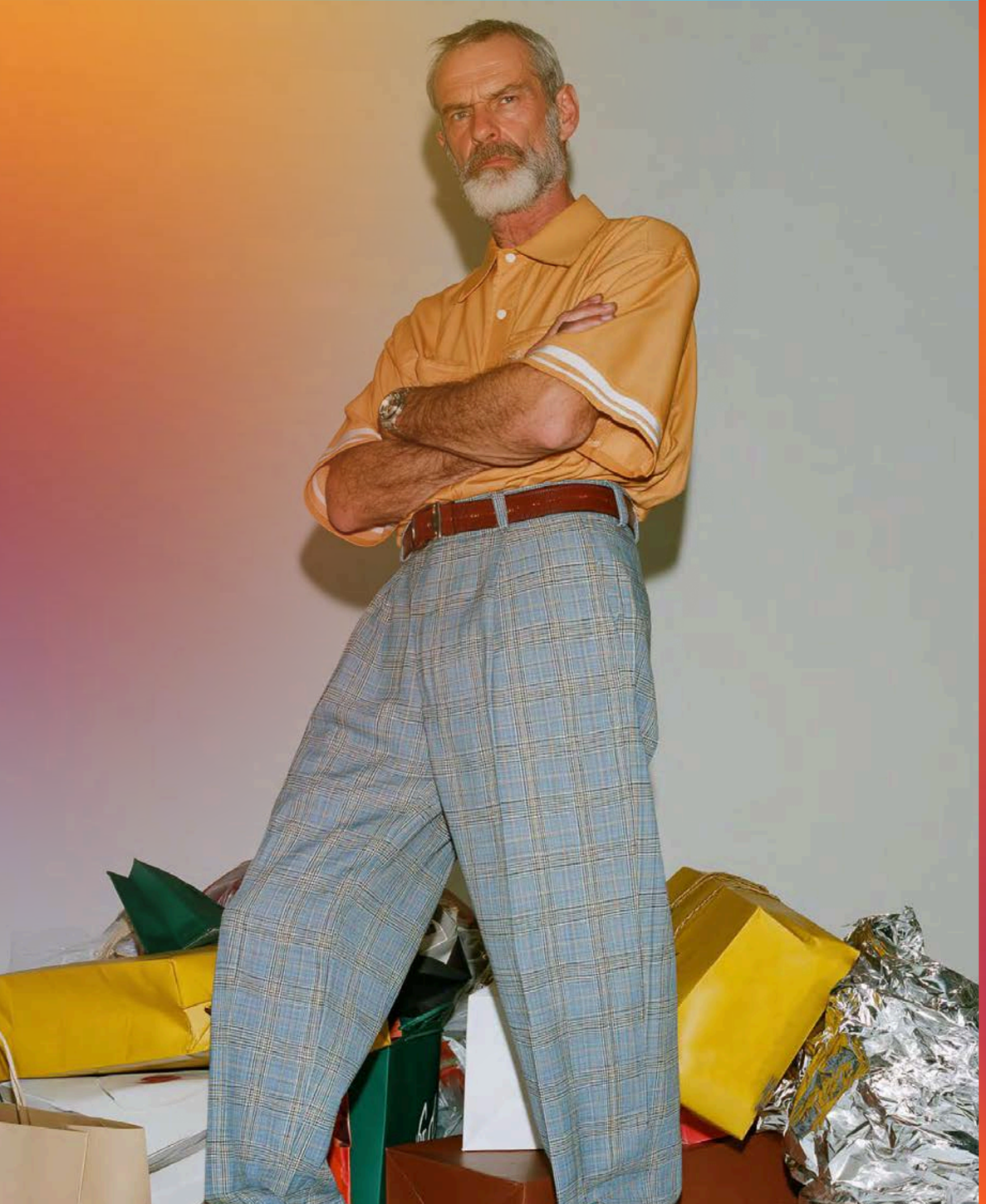
84% of shoppers say it's important for their favorite brands to have an app,

a shift that's directional, not a blip. *Mobile apps are trending toward assumed, not differentiated,* and skipping it isn't a missed upside anymore, *it's a visible gap, and a real cohort's revenue left on the table* (backed by data).

So stop counting installs. A download that doesn't retain is a vanity metric. The number worth celebrating is whether your app beats the website on speed, loyalty, and checkout, that's what actually turns an install into revenue.

Your app cannot just be your mobile website in a different wrapper.

Learn more about Tapcart



Chapter 5

What Converts, *& What Kills It*

The demand is at your door. These are the friction points quietly losing the sale, and the fixes that turn browsers into buyers.

The *Conversion Killers:*

- Pop-ups
- Slow pages
- Unclear sizing/product info
- Unexpected costs
- Re-entering payment/shipping
- Missing wallet options

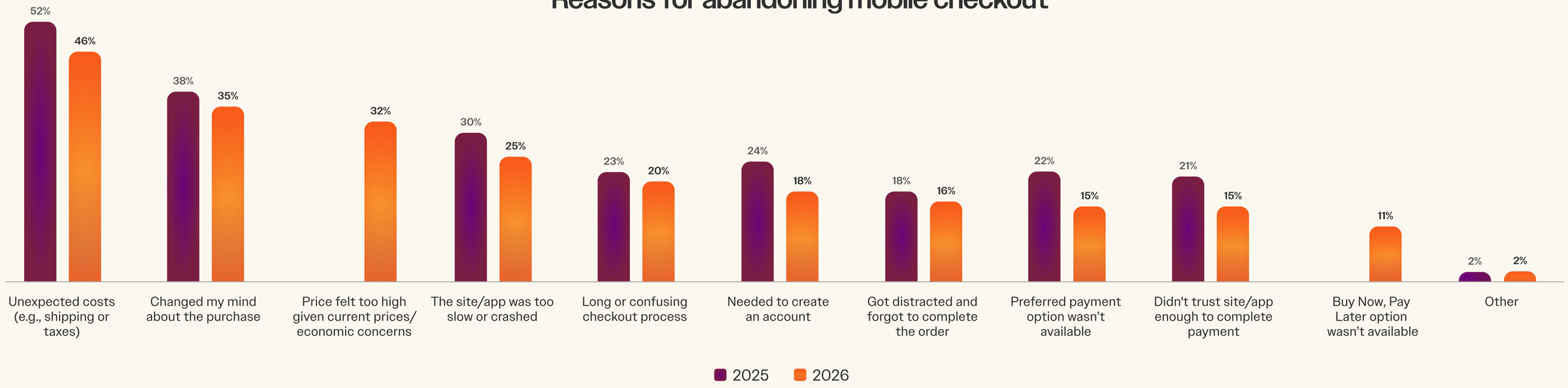
The *#1 cart-killer* is a cost the shopper didn't see coming

46% abandon over unexpected costs like shipping and taxes, well ahead of changing their mind (35%) or feeling the price is too high (32%). Most of the top reasons are things you control.

The Move

Surface all-in pricing (shipping, taxes, fees) before the final step. It's the single largest controllable leak in your funnel, and hiding costs until checkout guarantees you lose nearly half of ready-to-buy shoppers.

Reasons for abandoning mobile checkout

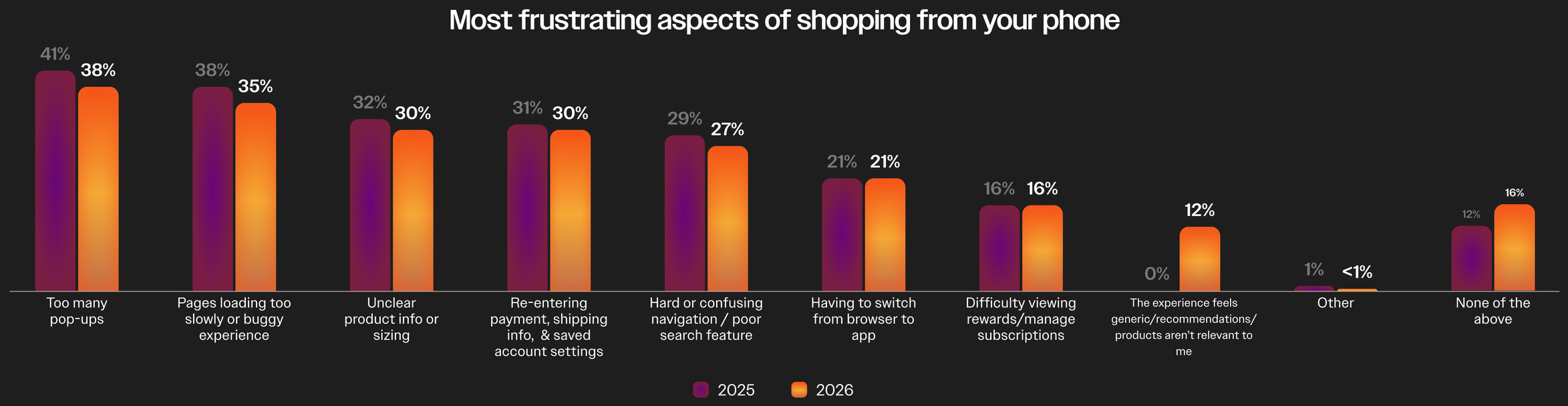


The fastest way to lose a mobile shopper: *pop-ups and slow pages*

Pop-ups, slow pages, unclear product information, and repeated data entry dominate mobile frustration. These are measurable UX issues brands can fix before spending another dollar trying to drive more traffic into the same leaky funnel.

The Move

None of these require new features, just discipline. Cut the pop-ups, fix page speed, clarify product details, and save payment info. These are the cheapest conversion gains available before BFCM.



Partner Feature | REBUY

Removing friction is only half the conversion equation. The other half is adding relevance, and that is where the biggest AOV gains hide.

During BFCM 2025, brands using Rebuy drove $1.7 billion in GMV, nearly 12% of all Shopify sales over the four-day weekend, and the top performers didn't get there by discounting.

Haircare brand Bask & Lather posted a 25.89% AOV lift over the weekend, with in-cart recommendations alone driving close to 60% of its extra revenue.

Partner Insight

Scotty Meiklejohn
Senior Manager, Content & Brand Storytelling

"The brands that won BFCM 2025 won by *personalizing every step of the journey,* across the PDP, cart, checkout, and post-purchase. If you're not personalizing, you're not trying."

Shoppers expect a *wallet of options*. Not just a card field.

69% expect a saved card, but 58% expect PayPal, 49% expect Apple/Google Pay, and a third expect BNPL or Venmo/Cash App.

The Move

Every missing payment method is a segment of abandoned carts. Offering saved cards, PayPal, and digital wallets covers nearly all shoppers and removes a last-step friction point.

64% of Gen-Z expect Apple/Google Pay

Millennials, Gen X, and Baby Boomers still heavily rely on cards

Gen-Z is the first cohort to expect digital wallets over cards. If you don't offer Apple/Google Pay, you're penalizing the demographic most likely to spend more this BFCM.

For Gen-Z, wallet support is an expectation, not a convenience.

Push only when it counts

A missing payment option reads as friction, not just inconvenience, so lead with the methods your audience already uses and surface them early. Get them to checkout smoothly, and the next lever is how you bring them back: notifications.

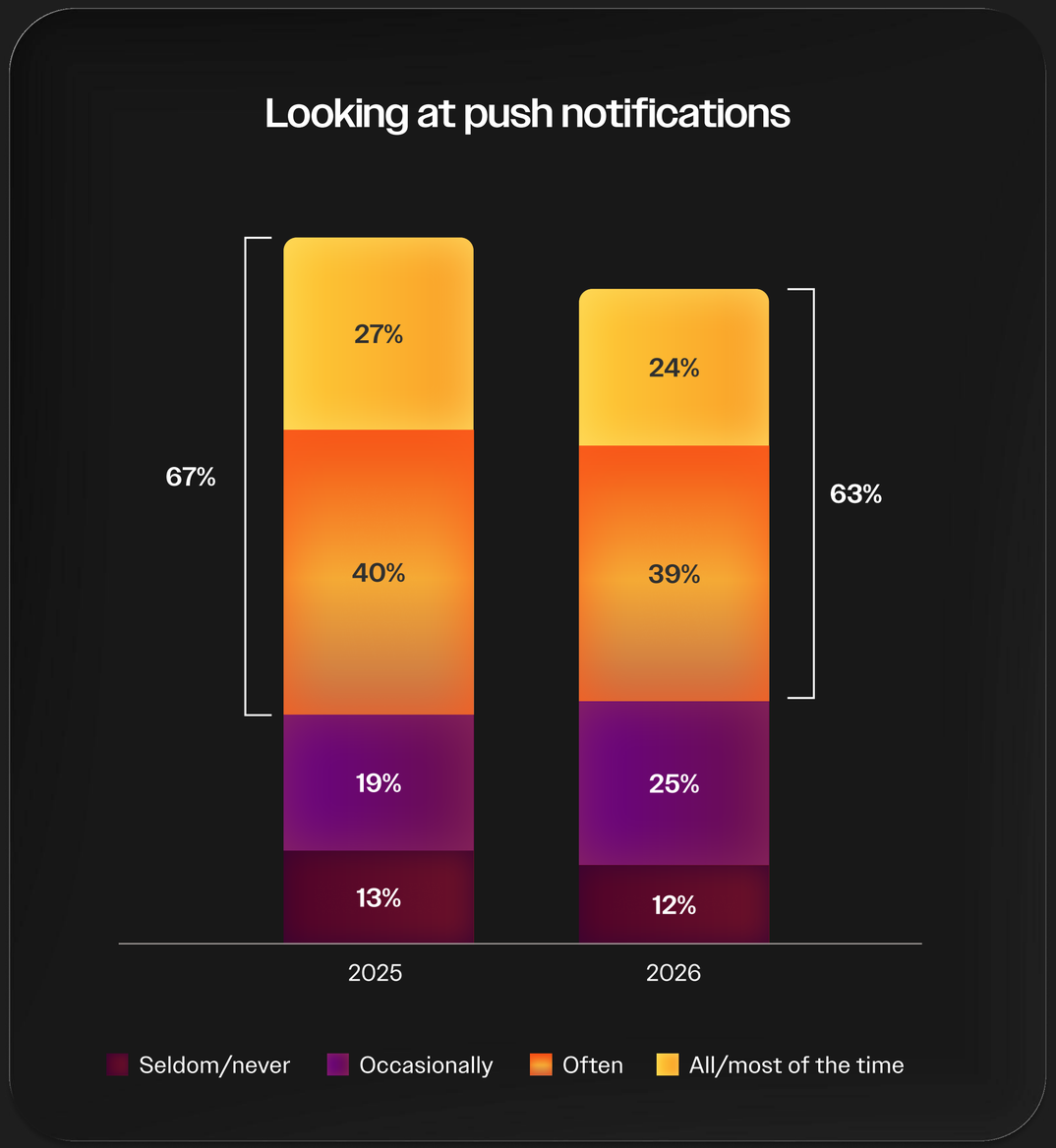
Push notification attention is slipping. *Spend it carefully.*

Most shoppers still look at notifications regularly, but engagement is slipping year over year — and over-notifying accelerates the decline.

The lesson isn't “send more before the channel gets worse”, it's to protect the channel by being more selective about what earns an interruption.

The Move

Every low-value push erodes attention you'll want for a real moment. Treat push as scarce and reserve it for genuinely time-sensitive alerts so it keeps working when it matters most.



Partner Feature | attentive®

That said, BFCM is the one window where more volume is welcome.
Attentive found that:

62% of shoppers are open to more messages than usual during the sale

65% will accept a higher frequency as long as it stays relevant

Partner Insight

During Cyber Week, *higher campaign volume* consistently correlated with *more revenue*.

The key is to ramp deliberately: Attentive recommends 2-3x your normal weekly SMS volume, paired with a gradual email ramp rather than an overnight spike, since brands that jumped straight to peak volume saw 22% lower ROI.

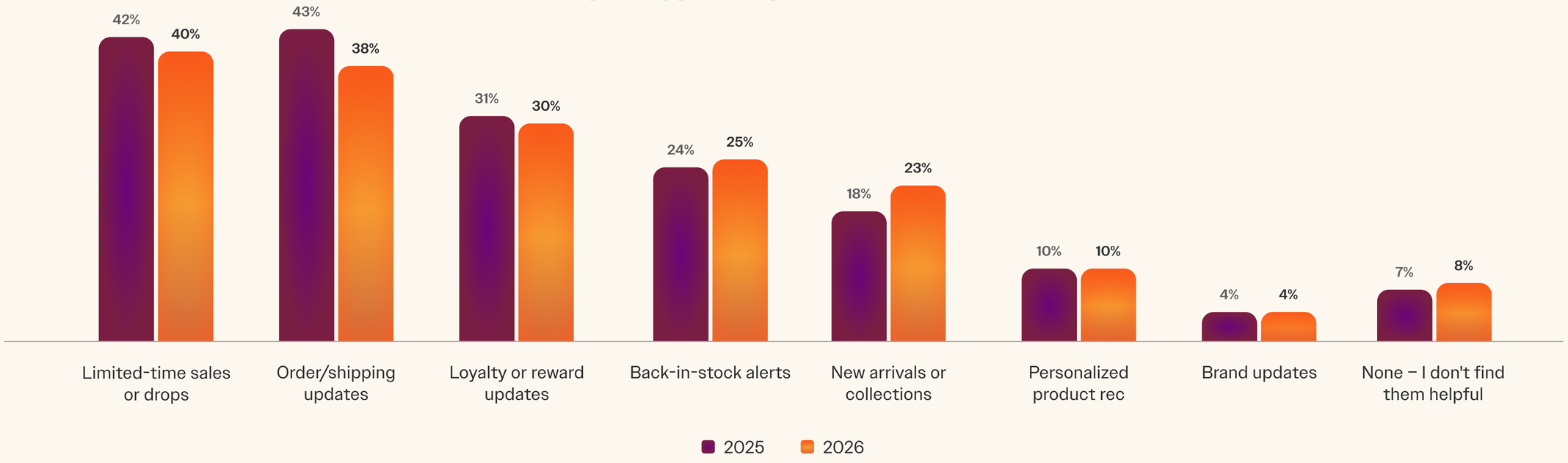
Push notifications work when *there's a reason to act*

Sales ending, drops, restocks, and shipping updates outperform generic recommendations because they give the shopper a reason to act now.

The Move

Reserve push for genuine urgency — drops, restocks, shipping updates. Using it as a recommendation channel wastes the interruption and accelerates the opt-out decline you're already fighting.

Most helpful types of push notifications



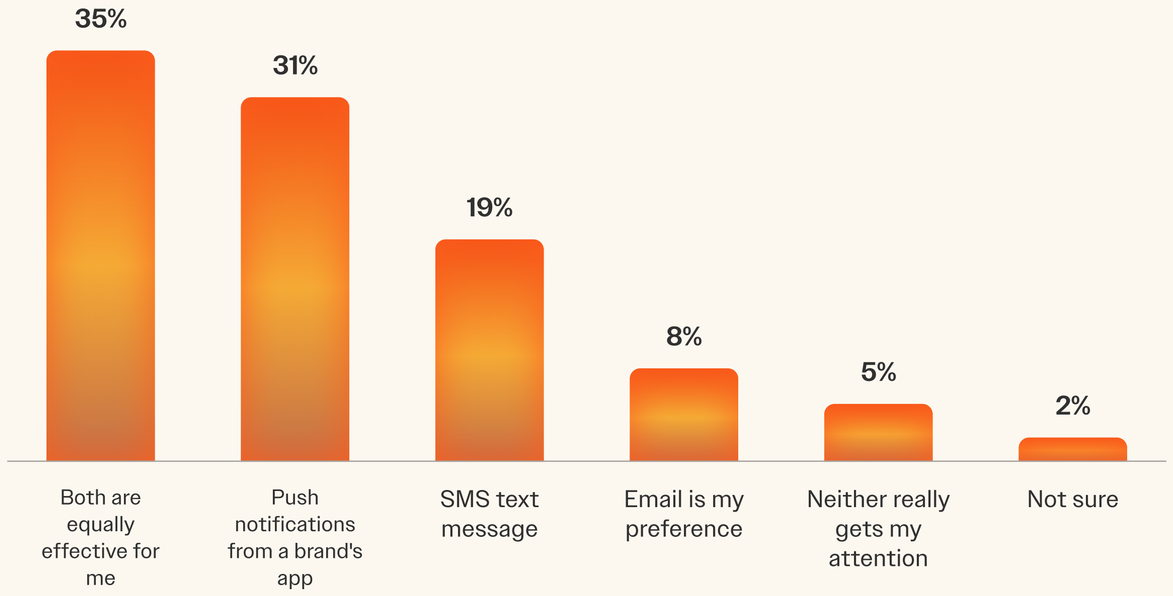
For urgent alerts, *push edges out SMS* & both *beat email*

35% find push and SMS equally effective, but among those with a preference, push (31%) clearly beats SMS (19%) and email (8%). Push preference is highest for Gen-Z and declines with age.

The Move

For drops, restocks, and low-stock warnings, push is your sharpest tool. Route genuinely urgent messages through it and don't dilute it by blasting the same thing across every channel.

Preferred method for time sensitive notifications



Bake personalization into the on-site and in-app experience, and reserve push for *genuine time-sensitivity*.

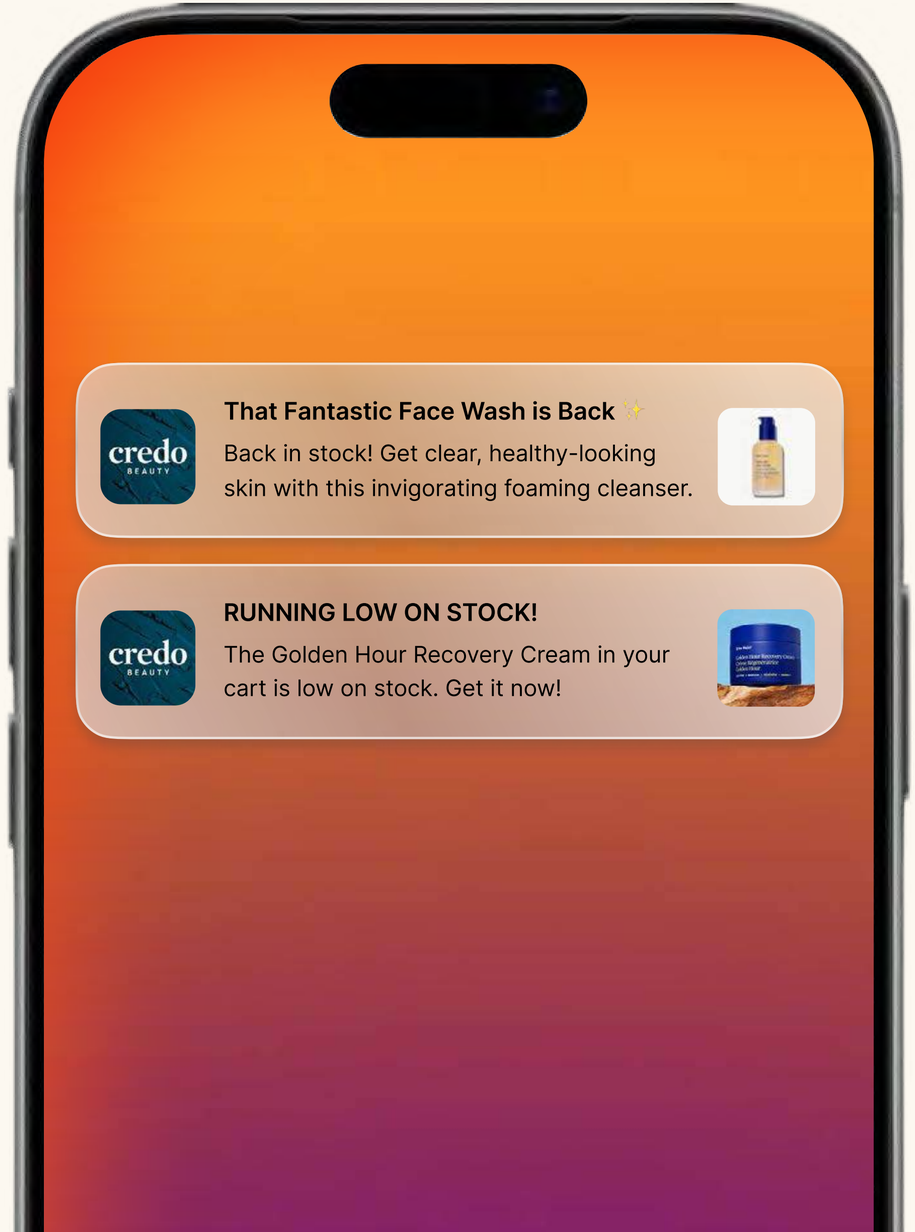
That's the difference between high-signal and low-signal push.

High-signal:

Timely and useful, like a price drop on a saved item, a back-in-stock alert, or an early-access window.

Low-signal:

Generic blasts that quietly burn the attention you're working to keep.



We broke it all down, 10 high-signal and 10 low-signal examples, each with copy you can borrow, in our complete guide.

Read: The Ultimate Push Notification Guide to Boost Engagement and Retention

Make *Loyalty* Your One *Retention Bet*

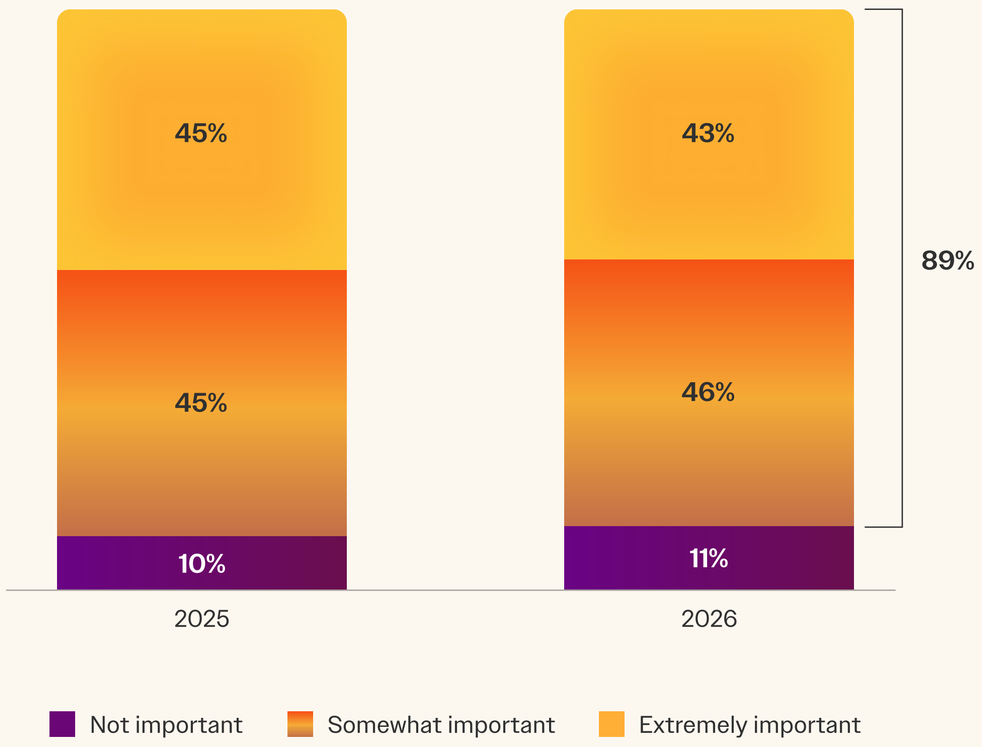
Loyalty matters to ~9 in 10 shoppers and becomes even stronger among luxury and highly engaged customers. Unlike many tactics that work only for a narrow cohort, loyalty simultaneously supports app acquisition, retention, repeat purchase, and higher-value customer relationships.

Only ~1 in 10 shoppers say loyalty rewards don't matter to them.

The Move

A visible, easy-to-use loyalty program is one of the few levers that matters to almost everyone, and a top reason shoppers download and keep an app. It belongs at the center of retention.

Importance of loyalty rewards/points



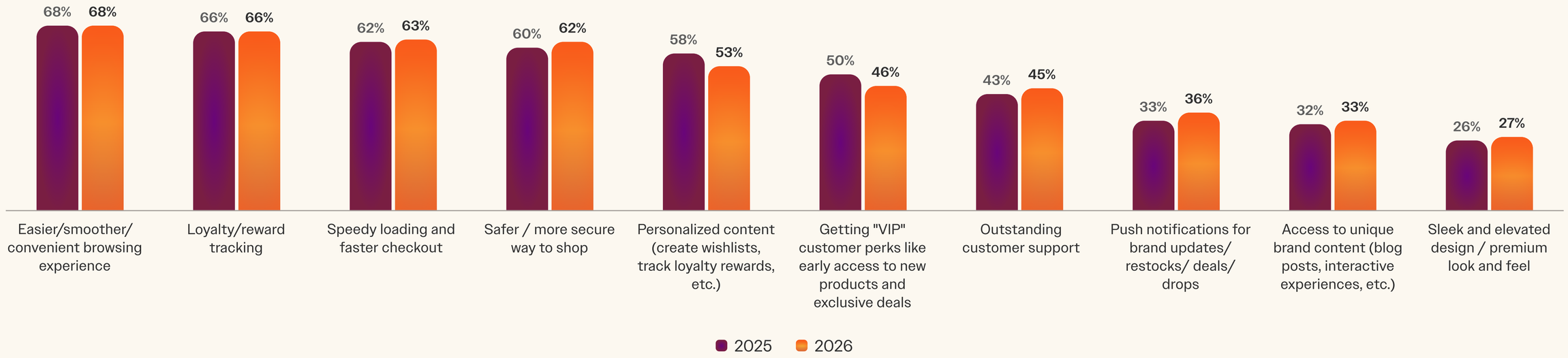
A discount gets the download. Loyalty keeps them *coming back.*

Loyalty and reward tracking (66%) ranks among the top reasons an app is worth keeping.

The Move

Don't let your loyalty program live buried in a menu. Surface reward balances, progress, and perks front-and-center in the app experience, because "easy to track my rewards" is one of the strongest reasons shoppers stay.

Most beneficial mobile app attributes and features



Shoppers want the brands they buy to *share* their values

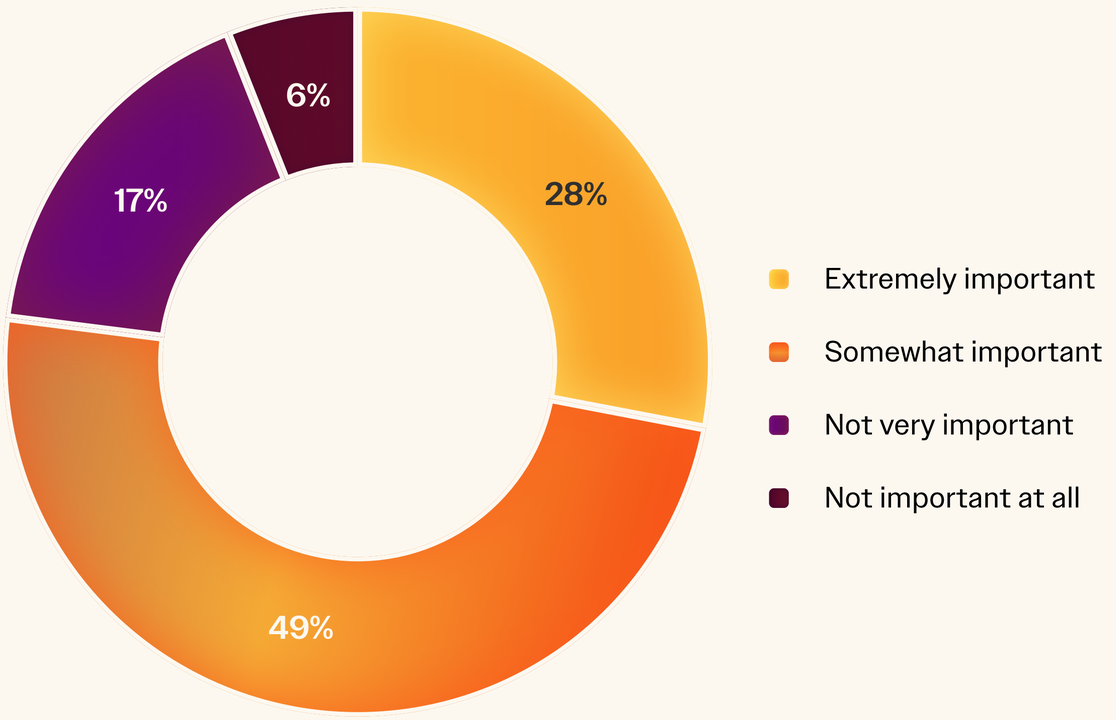
77% say it's at least somewhat important that a brand shares their values on things like sustainability and ethics, while 28% call it "extremely important."

Shared values matter much more to younger and higher-engagement shoppers than older audiences.

The Move

Values messaging is a precision tool, not a universal headline. Dial it up for younger, high-engagement audiences and lead with practical value for older shoppers who weigh it less.

Importance of brand's shared values

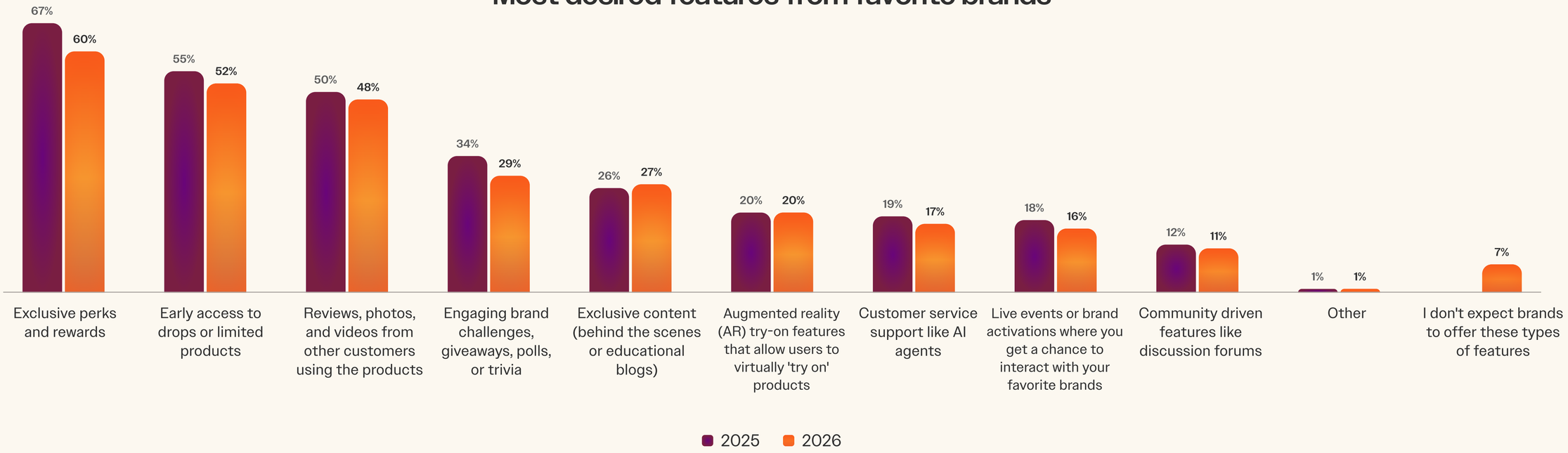


Shoppers want *perks* and *access*, not gimmicks.

The top two wants are both about being rewarded and getting in early.

Exclusive perks/rewards (60%) and early access (52%) lead what shoppers want from favorite brands. Before adding the shiny feature, brands should ask whether the app already gives customers a materially better deal or experience than the website.

Most desired features from favorite brands



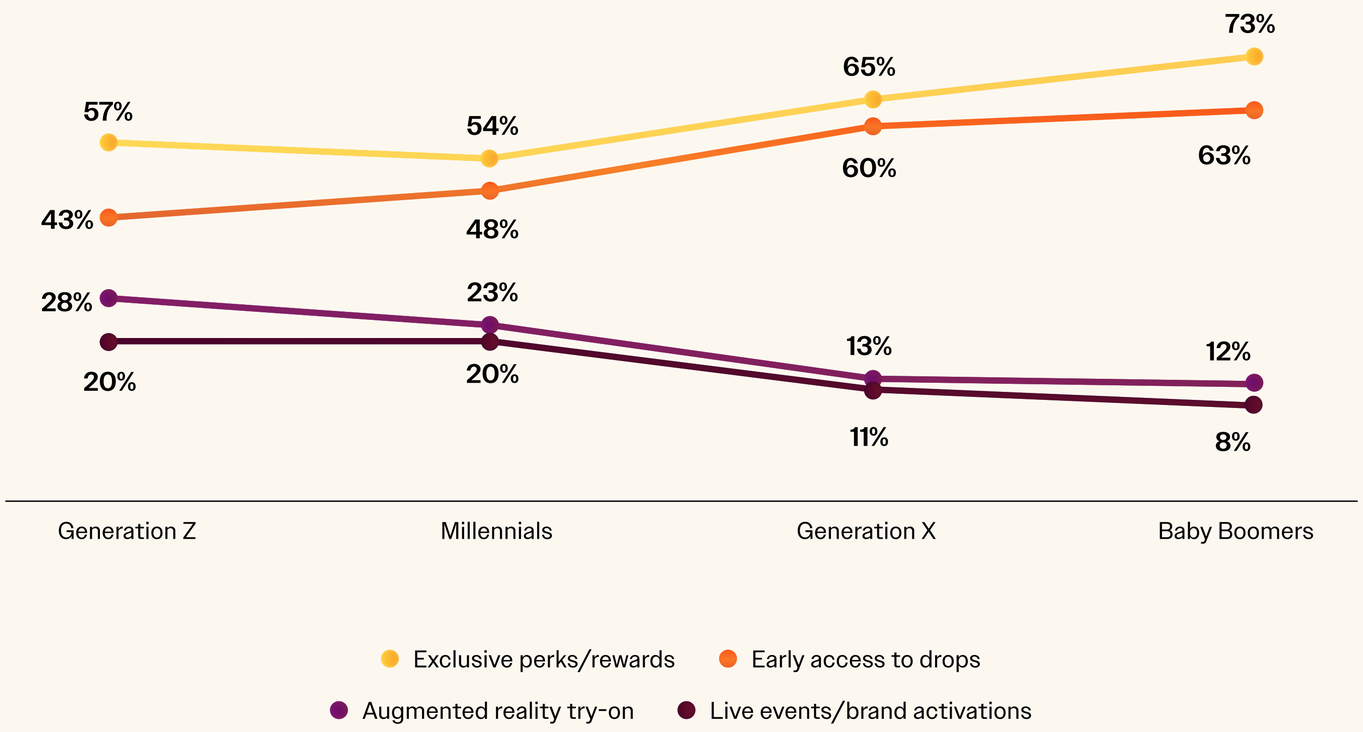
Desired features aren't universal. *Preference shifts* by *age and gender.*

Exclusive perks and early access climb with age (early access reaches 63% of Boomers), while AR try-on and live events skew younger.

Gender splits the list too: women over-index on exclusive perks and rewards (66% vs. 52%), while men lean toward exclusive content, customer service, live events, and community features.

Even at the low end, perks/rewards is the single most-wanted feature across every group — so it's the safe anchor, and the rest is how you tailor around it.

Desired features – by generation



Partner Feature | yotpo.

Yotpo's data finds that loyalty redeemers have a *164.4% higher repeat purchase rate* and drive *88.5% more revenue per customer* than shoppers who never redeem.

Partner Insight

Naama Brumer
VP, Corp. Marketing & Demand Gen

"The BFCM discount may earn the first order, but the *points balance* gives shoppers a reason to make the second.

The strongest programs attach future value to the holiday purchase through points, tiers, and access, so the *customer relationship continues* after the promotional window closes."

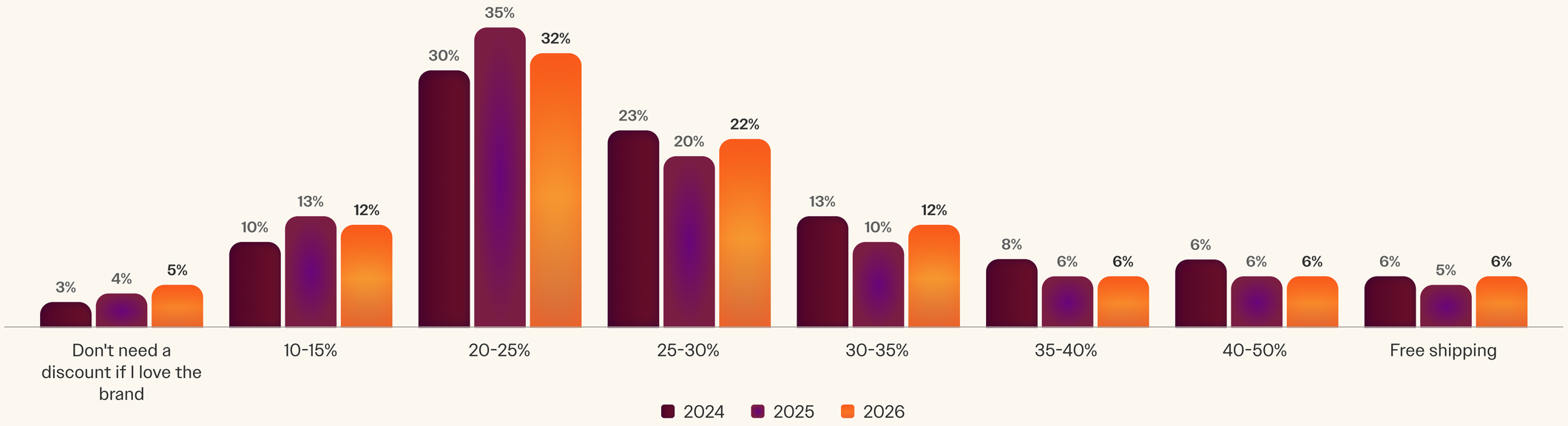
Discount smarter, not deeper

The modal threshold that shoppers expect is 20–25% off, and only around three in ten shoppers say they need 30%+. Just 5% won't buy without a discount even from a brand they love.

The Move

Brands should test the minimum incentive needed by segment rather than assuming deeper discounts automatically create proportionally more demand. Reserve your steepest offers for clearance, not for shoppers who'd convert at 25% off.

Minimum discount to consider making a purchase



BOGO beats every other kind of deal

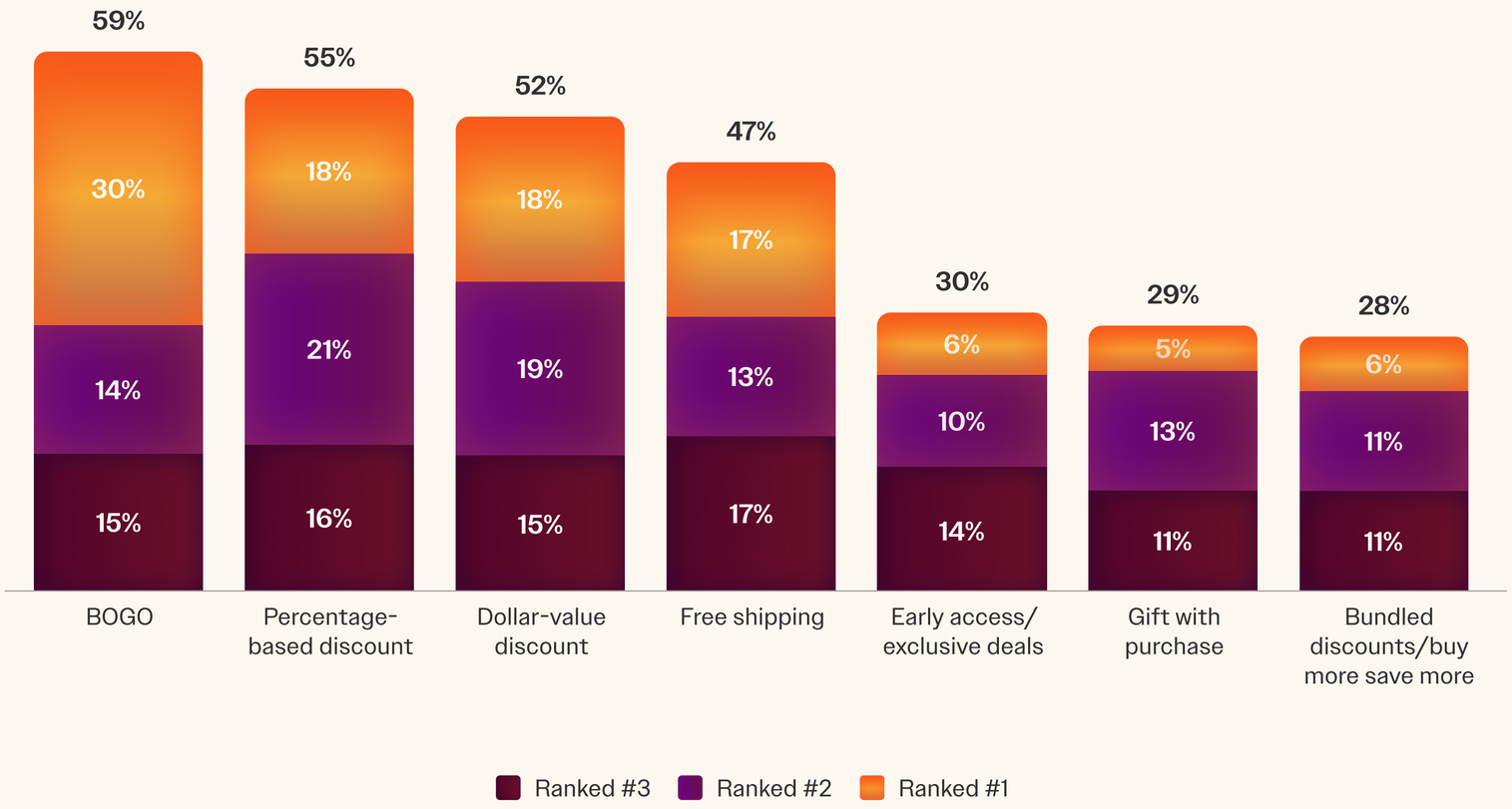
BOGO is the single most-preferred promotion (ranked #1 by 30% of shoppers), ahead of percentage discounts, dollar discounts, and free shipping. Bundles and gift-with-purchase rank lower.

The Move

When you promote, BOGO and simple %/$ discounts win. They feel generous to the shopper while giving you more control over margin than a blanket sitewide sale.

(Early access ranks last here only because shoppers are grading it against straight price cuts)

Most preferred promotions



Partner Feature | SIMPLE BUNDLES

Partner Insight

Tina Donati
Head of Marketing

"What stands out is that shoppers are open to many *different expressions of value*, from BOGO to percentage discounts and free gifts.

Bundles give brands a flexible way to bring those incentives together into an offer that *feels generous* to the customer, increases the value of the basket, and still protects the economics behind the purchase."

The *Bottom Line*

Demand shows up on its own, Chapter 1 proved that. Whether it converts is entirely on you. Every "killer" in this chapter is self-inflicted, and fixable.

Fix the leaks, reward the loyal, and message with intent. Do that, and you won't just capture a strong BFCM, you'll turn deal-seekers into customers who come back.

Three high-ROI fixes to make before BFCM →

Show the full price before the final step.
Unexpected costs are the #1 cause of cart abandonment (46%) — so surface all-in pricing or a clear free-shipping threshold early.

Offer digital wallets, not just a card field.
Half of shoppers expect Apple Pay or Google Pay, and for Gen-Z, wallets now outrank the credit card itself (64% vs. 62%).

Strip the friction out of mobile.
Pop-ups, slow pages, and re-entering details push 45% of mobile shoppers to abandon. Fix speed and save account info so checkout takes seconds.

Chapter 6

Who Shoppers *Trust* to Buy From

Amazon still owns habit, but trust is shifting toward brand-owned apps. For Gen Z, it already has.

Amazon has spent years conditioning shoppers to expect convenience, speed, familiarity, and confidence. That habit is still incredibly powerful. Marketplaces remain the most trusted online-shopping option overall.

But the trust gap is starting to move. Marketplace trust declined year over year while trust in branded mobile apps increased. Among Gen Z, *branded apps now outperform Amazon* on trust.

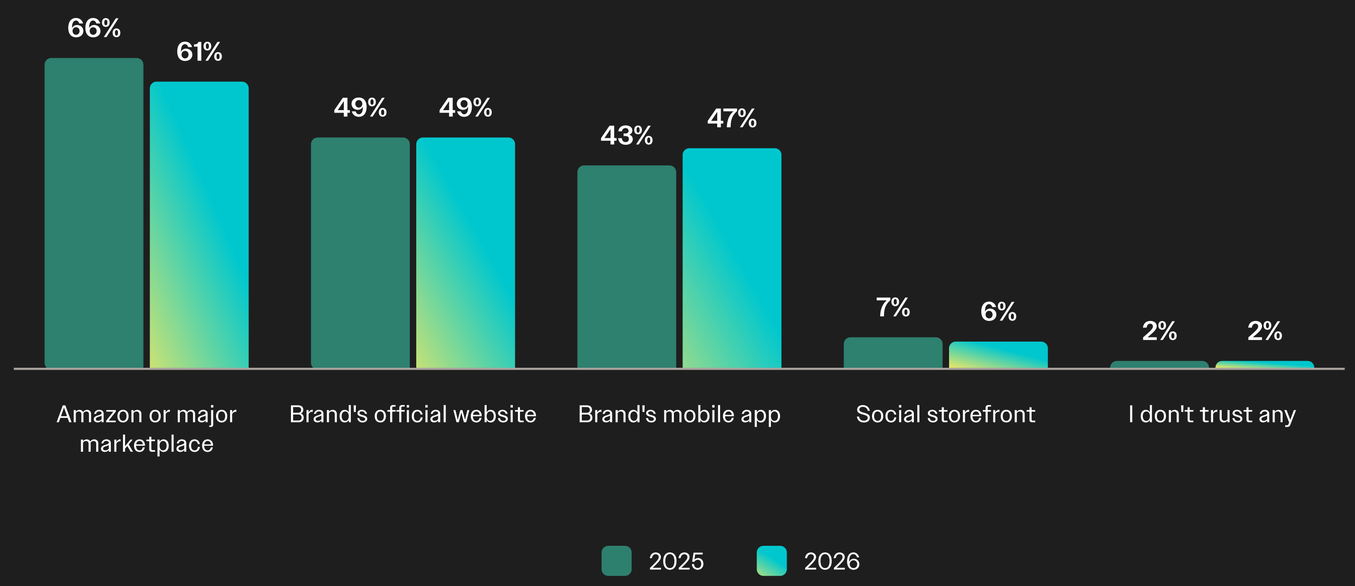
Amazon still owns habit. *Not trust.*

Amazon/major marketplaces still lead, but trust is falling while branded-app trust rises. For Gen-Z specifically, a brand's own app is now the most trusted place to buy (58%), ahead of Amazon (52%).

The Move

Investing in owned mobile *now* catches a trend moving in your favor. Now is the time to gradually move customers onto a surface where the brand owns the relationship, data, experience, and repeat purchase.

Most trusted online shopping options



Partner Feature | recharge

BFCM might not be when most demand first shows up, but it's still where a lot of it converts, and what happens after that purchase is what decides whether it pays off.

Partner Insight

Ebuka Chukwuonwe
Technology Partner Manager

"BFCM gets a customer through the door, but the *retention motion* is what turns that *acquisition into durable revenue*. Our data shows that shoppers who became subscribers generated roughly 2.3x the 12-month value of one-time buyers.

The brands that *win peak season* treat the weekend as the acquisition event and the next 90 days as the retention campaign."

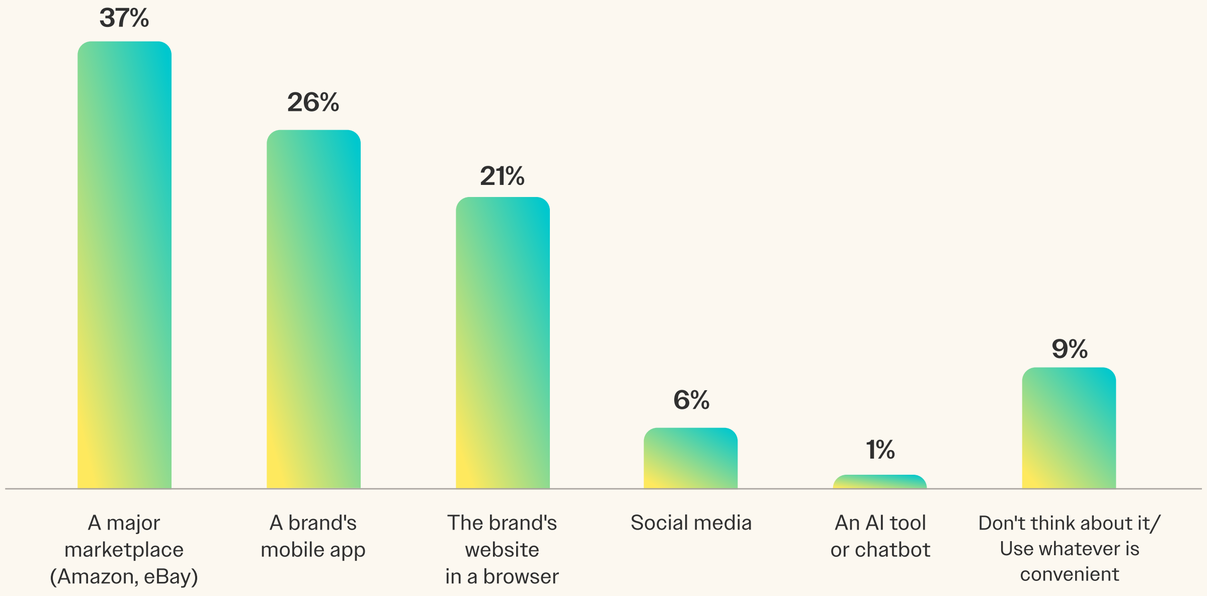
Trust Is *Shifting Faster Than Habit*

Trust in a brand's mobile app rose to 47% from 43%. However, major marketplaces are still the "Channel where I feel most in control" at 37%, then brand app, brand website, social media, and finally AI.

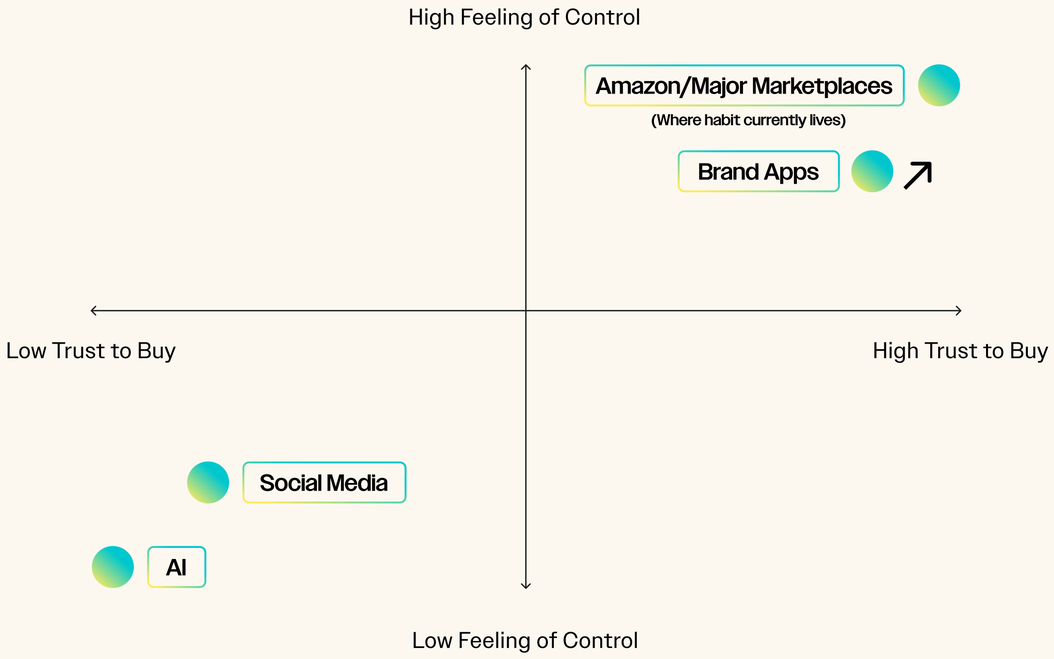
The Move

Marketplaces still own the "in-control" feeling, which is why they win habit. To pull shoppers to your app, you have to make it feel as safe and effortless as Amazon. Control, not trust, is the moat you're competing against.

Channel where you feel most in control of shopping experience



Habit vs. Trust



The *Bottom Line*

Trust is moving toward owned channels, and Gen Z is the clearest signal of where it's headed. But trust and habit aren't the same thing. Branded apps are winning the first while Amazon still owns the second, because marketplaces have spent years making shoppers feel in control, and control is what turns into habit.

Here are four ways to close the gap:

- Use marketplaces for reach, but move customers to owned apps for retention and LTV.
- Give shoppers a real reason to choose your app over the marketplace: loyalty points, exclusives, early access, better product education, easier support, and faster checkout.
- Make the app feel as safe and effortless as Amazon. Control is the moat you're competing against, so remove every ounce of friction.
- Build owned-mobile habit before the holiday rush, not during it. Treat Gen Z as your signal for where trust is going.

Amazon didn't win habit overnight, and you won't either. But trust is the harder thing to earn, and on that front, the shift is already underway. Start building the habit now, and BFCM becomes the moment shoppers finally choose your app over the marketplace.

Chapter 7

Putting It *All together*

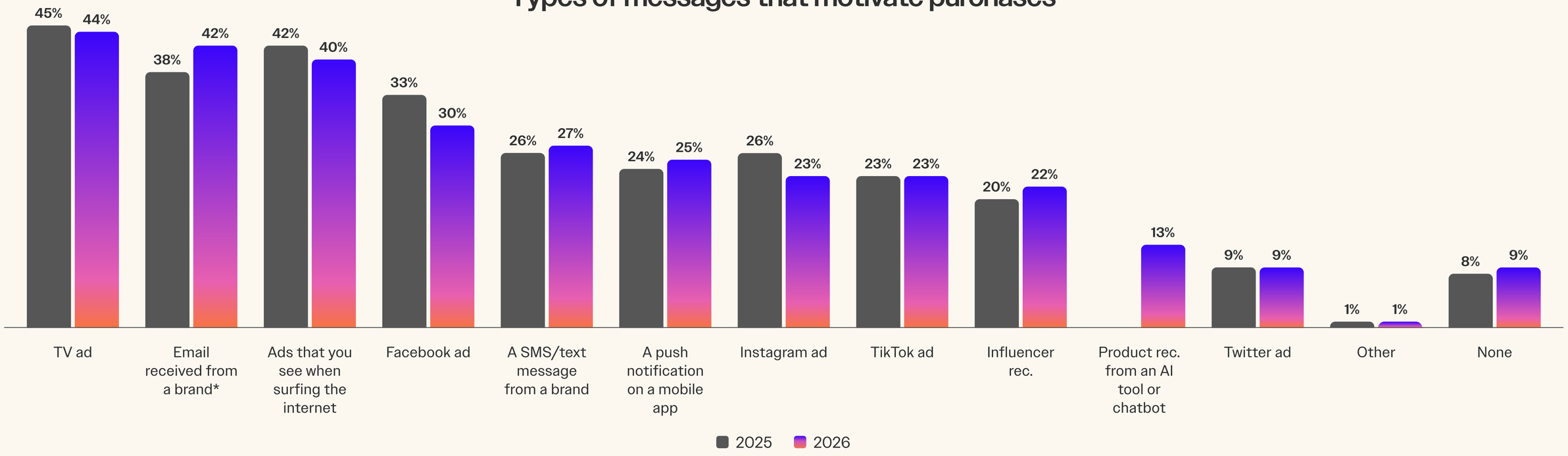
No single channel wins BFCM. The brands that do give every channel a job, and connect them all to one they own.

No single channel owns BFCM

TV still leads as a purchase motivator at 44%, but only barely over email (42%) and online ads (40%), and AI recommendations already register at 17% in their first year on the list. No channel is dominant enough to build your entire plan around.

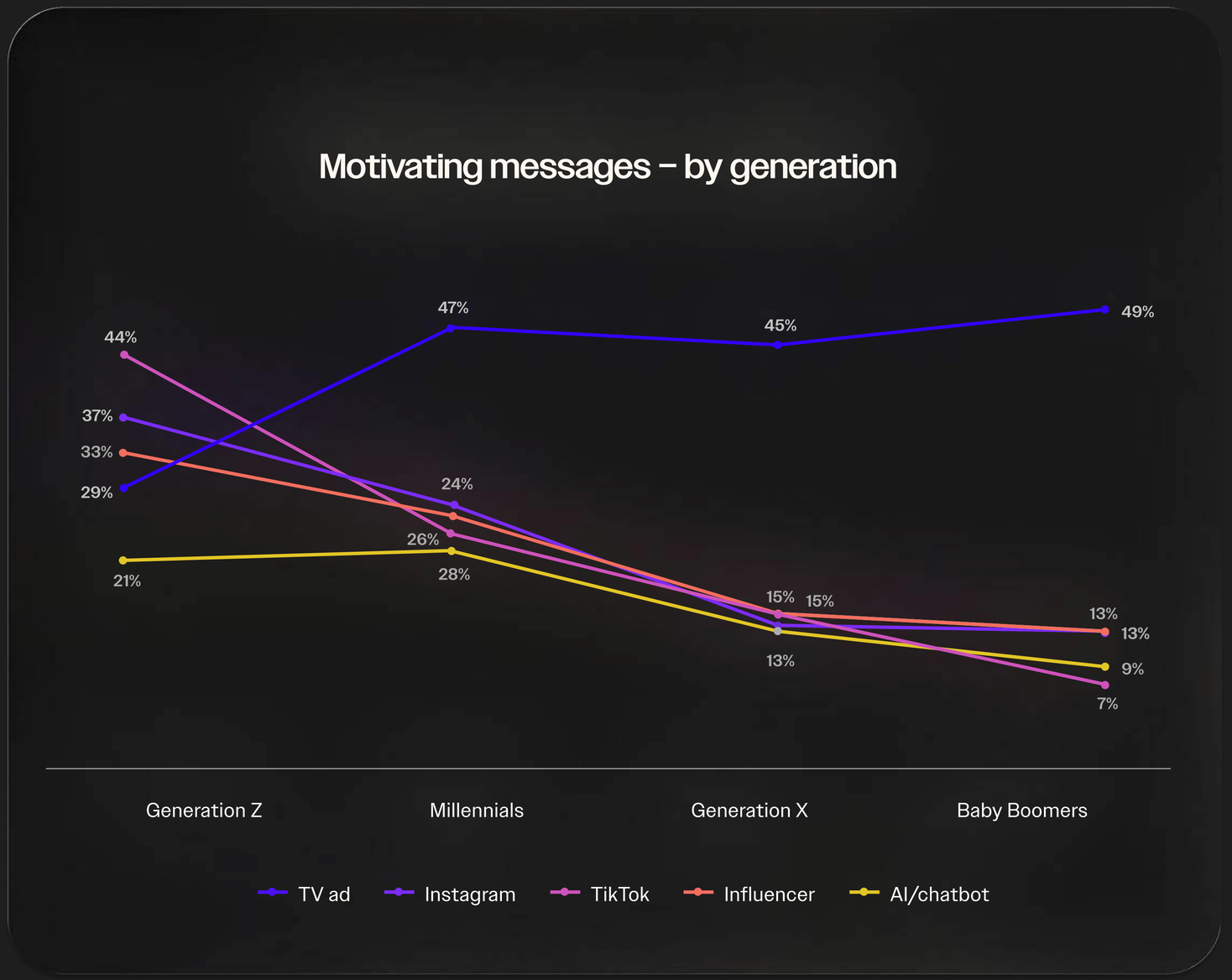
The top three motivators sit within four points of each other. No channel dominates.

Types of messages that motivate purchases



What moves a Boomer *barely registers* with Gen Z

TV climbs with age and peaks with Boomers, but for Gen Z it drops to the bottom of the list. TikTok, Instagram, and creators do the persuading for younger shoppers, and social skews even harder for premium buyers. An Instagram ad motivates 47% of luxury shoppers versus 23% overall.



For Gen Z and luxury buyers, social is not supplemental. It is the primary channel.

The *Bottom Line*

A single creative-and-channel plan will always over-reach one audience and miss another.

So stop ranking channels by performance and start assigning them jobs.
Each one is good at a different part of the journey:

- **TV and broad digital:** awareness and reach
- **Email:** dependable offer communication
- **Social and creators:** discovery and desire, especially for Gen Z and luxury
- **AI:** research and shortlisting, before the shopper ever clicks
- **Marketplace:** control and convenience
- **Mobile app:** conversion and retention
- **Push Notifications:** urgency and utility

Above all, give paid channels a path back to something you own: an app download, a loyalty signup, a wishlist, an early-access registration. Paid channels only ever rent you attention. The brands that win BFCM turn that borrowed attention into something they own.

BFCM Weekend Ends. *The Relationship Doesn't.*

Everything in this report points to the same conclusion:

Demand isn't the problem. It shows up every year, and this year it's showing up ready to spend. The brands that win are the ones prepared to capture it, convert it without friction, and hold onto it long after the deals are gone.

That last part is where most brands leave money on the table. They pour everything into one weekend, win the sale, then hand the customer back to the marketplace until next November. But the shoppers you work so hard to earn are only valuable if they come back. The real opportunity isn't a weekend of revenue. It's a channel your customers keep choosing, and that channel is a mobile app you own: where loyalty is visible, checkout is effortless, and a well-timed push turns a one-time deal-seeker into a repeat customer.

Tapcart helps Shopify brands build exactly that. App-exclusive offers, high-signal push, personalized shopping, built-in subscription and loyalty management, and streamlined checkout — *all designed to keep customers engaged* before, during, and long after the sale.

So this season, play the long game. Capture the demand that's already coming, and turn it into a mobile channel your customers return to well beyond BFCM.

Build your app with Tapcart