Holiday Growth eBook:

Scaling Ecommerce for BFCM 2026

NATIONAL POSITIONS

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This year's edition carries more data than last year's, because more changed. Every figure is sourced, and the sections build in the order you should work through them: understand the market, then the shopper, then the channels, then the plan.

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The Seven Shifts At a Glance

1 November gets bigger, December gets three weekends

BFCM now falls entirely in November, shifting Cyber Monday revenue out of December. Expect tougher December comps, offset by three full weekends before Christmas.

2 Demand starts early, converts late

Pre-BFCM spend hit ~65% of the weekend, yet Cyber Five regained share for the first time since 2019. October is still the real launch month.

3 AI became a real channel

Traffic up 393% YoY and now converting 42% better than direct, a complete reversal from a year ago.

4 A third of the storefront is unreadable

34% of retailer homepage content is invisible to the models sending that traffic.

5 Retention carries the revenue

New-customer share of BFCM revenue fell from 59.7% to 48%. Strategy starts in the database.

6 Trust outperforms discount depth

Shoppers assume the discount is theater. Validation signals now do more conversion work than deeper cuts.

7 Social crossed into transaction

21% bought gifts directly on social, up from 12%. Media and storefront now need separate measurement.

Economy

The backdrop every offer, budget and forecast has to survive.

2026 ACTION: Segment offers by value sensitivity.

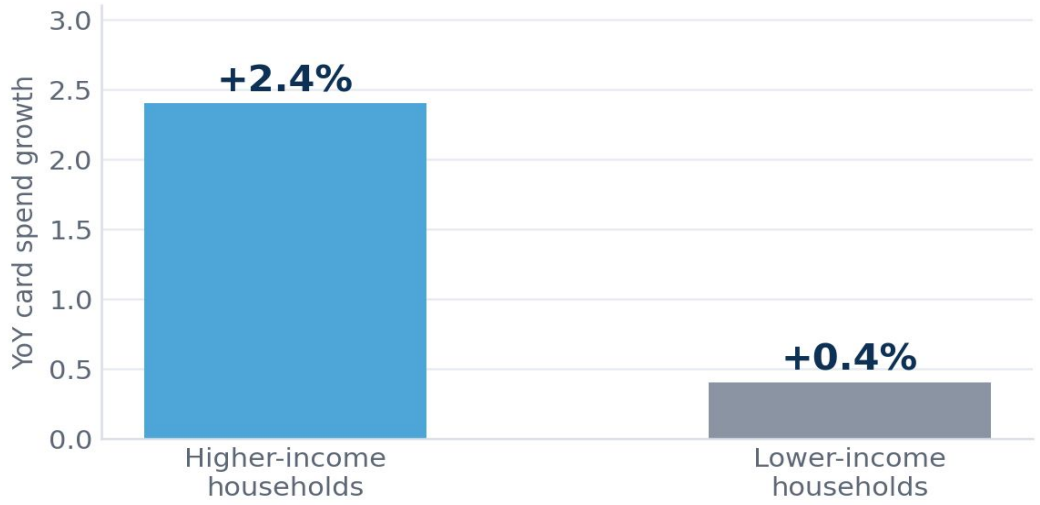
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The Split Consumer

Headline growth looks healthy. The NRF forecasts 4.4% retail sales growth for 2026, comfortably above the 3.6% ten-year average, and it is the first year the forecast has been produced on their revised economic model.

The distribution underneath that number is where the planning problem sits. Bank of America Institute data shows card spend among higher-income households growing at 2.4% year over year, against 0.4% for lower-income households. Six times the growth rate, in the same economy.

Two audiences, not one. For a brand selling into both, this is not one audience responding to one offer. It is two audiences whose price sensitivity, promotional patience and basket behavior have diverged sharply, and a single sitewide discount will over-serve one and under-serve the other.



THE ACTION: Build two offer tracks rather than one sitewide discount. The split is real, but not a collapse: Coresight has net consumers expecting to spend more at 7.1% in June, the highest reading of 2026.

Source: NRF 2026 retail sales forecast; Bank of America Institute Consumer Checkpoint; Coresight

Tariff Carryover and the Value Split

Tariff policy moves faster than consumer psychology. Even where duties have eased, the expectation of higher prices persists, and that expectation, not the tariff itself, is what shapes behavior through Q4.

The pattern is not uniform trading down. Shoppers are trading down on goods where brand adds little and trading up where the purchase carries emotional weight. Google's holiday research found something counterintuitive here: deep promotions did not push consumers toward cheaper products. Shoppers used the promotion to buy a better product than they otherwise would have.

Where they trade down

- Commodity and undifferentiated categories
- Repeat consumables with easy substitutes
- Anything where a private label sits one shelf over
- Gifts bought out of obligation rather than intent

Where they trade up

- Gifting where the recipient relationship matters
- Self-reward purchases during a gifting season
- Categories with visible quality differences
- Products where a promotion makes premium reachable

THE ACTION: Decide which end of the value split you sell into, then merchandise for it. The middle loses both ways.

Source: Google holiday research; eMarketer; Braze BFCM Consumer Trends 2026

What 2025 Taught Us

Record volume, but the behavior underneath it is the real story.

2026 ACTION: Budget October and November as two separate jobs.

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2025 in Numbers

The 2025 season produced extraordinary volume. A benchmark across 33,000 stores tracked $2.88 billion in revenue from 26 million orders over the BFCM weekend alone. Judged on top-line, it was a record.

Judged on how that revenue arrived, it was a warning. Six structural changes showed up simultaneously, and each of them makes 2026 harder to execute than a simple repeat of last year's plan.

Mobile became the primary checkout

70% of Cyber Week orders

Returning customers grew in importance

New-customer share fell 11.7 points

AI emerged as a shopping channel

And began converting better than direct

The promotional calendar expanded

Four distinct peaks, not one weekend

TikTok gained real efficiency

ROAS +28.4%, CPM −27.5%

Advertising costs kept rising

Google CPA +34.2% year over year

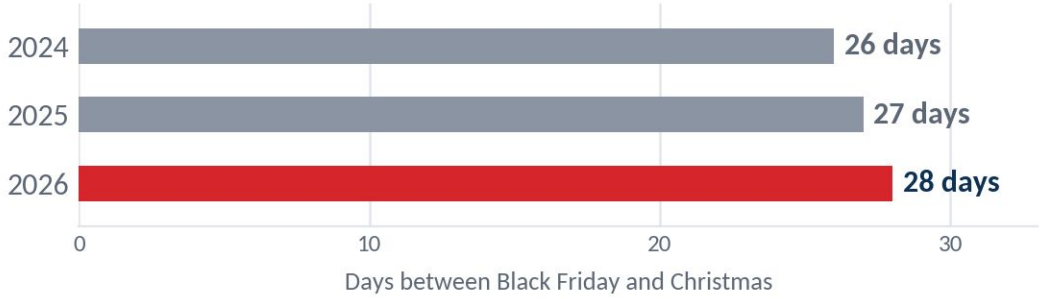
Source: Triple Whale BFCM benchmark, 33,000 stores

The 28-Day Window: November Gets Bigger

Black Friday falls on November 27, 2026, giving retailers 28 shopping days until Christmas, one more than 2025. But the calendar creates an important year-over-year shift in how holiday revenue will be distributed.

BFCM revenue will now be concentrated entirely in November. Cyber Monday falls on November 30 this year, versus December 1 in 2025. This means December may initially appear softer year over year simply because Cyber Monday revenue has shifted into November.

Three clean December weekends. That is December's advantage this year: more room for weekend promotions, gifting campaigns, urgency messaging, shipping cutoff offers and last-minute shopping pushes.



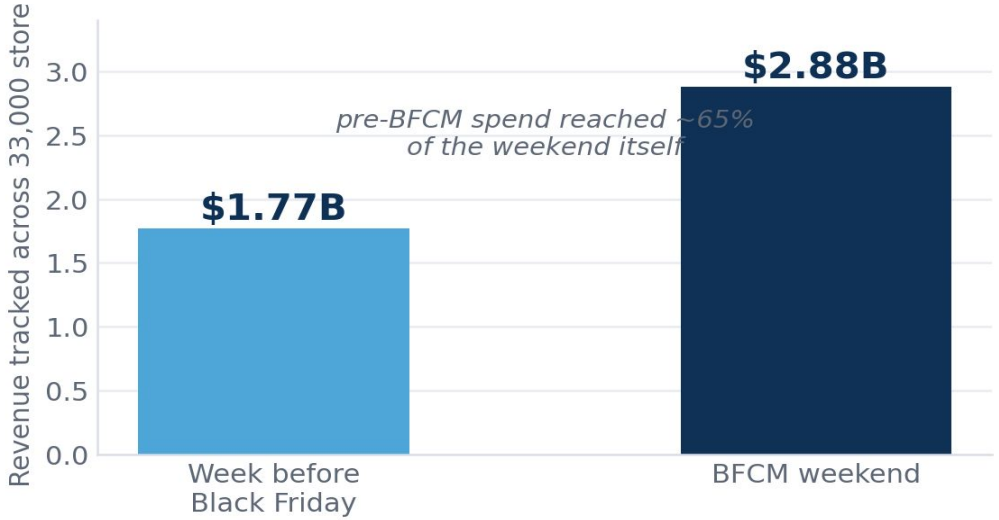
THE ACTION: Plan for a stronger November and softer December comps, then build three December weekend promotions to recover the difference.

BFCM Starts Before BFCM

Demand now builds for weeks before the window opens. The same benchmark recorded $1.77 billion in the pre-BFCM period alone, roughly 65% of the weekend's own volume. Google's research puts 39% of consumers already shopping by early October, and 61% of early-season shoppers reaching a decision before Black Friday.

That conclusion is wrong. The obvious read is that BFCM has been hollowed out and the money has moved to October. Acting on it will cost you the window.

Cyber Five actually regained its share of total holiday ecommerce in 2025, the first time it has gained share since its 2019 peak. Both facts are true simultaneously. Shoppers research for weeks. They still transact in the five days.



THE ACTION: Budget October and November as two separate jobs. October buys the audience; November harvests it.

Source: Triple Whale; Google holiday research; BigCommerce 2026 Holiday Trends

Four Holiday Peaks

The season is no longer one event. It is four, each with a different shopper mindset, a different offer logic and a different creative register. Running one campaign across all of them wastes budget in the early phases and under-serves the late ones.

PEAK 1

Early Creep

Sept - Oct

Discovery and research. Audiences get built here, not converted. Gift guides, quizzes and wish lists do more work than discounts.

PEAK 2

Cyber 12

Mid-late Nov, the 12 days around Cyber Five

Offers begin dropping and decisions accelerate. VIP early access ahead of the window, flagship offer on Friday.

PEAK 3

Super 5

Dec 20 - 24

Extreme urgency. Shipping deadlines, local inventory, BOPIS and gift cards carry the volume.

PEAK 4

Q5

Dec 26 - Jan 15

Gift card redemption, self-gifting, exchanges. High intent, low competition, routinely ignored.

THE ACTION: Give each peak its own budget, audience, creative and message. Do not automatically make Cyber Monday deeper than Black Friday.

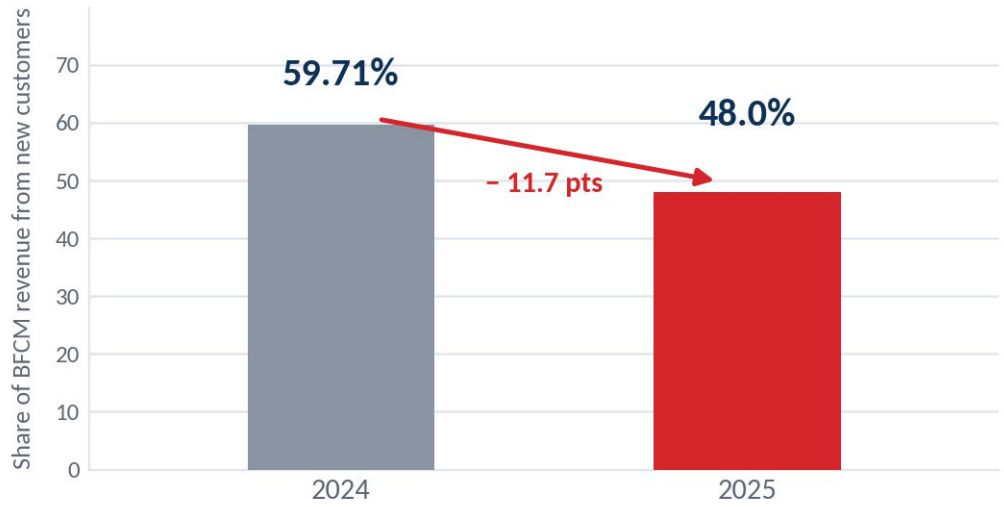
The Retention Shift

More than half of holiday revenue now comes from people the brand already had. In 2024, new customers drove 59.71% of BFCM revenue. In 2025 that fell to 48%, an 11.7-point drop in a single season.

This reframes where BFCM planning starts. If the majority of revenue comes from the existing base, the first work of the season is not media planning. It is segmentation. Acquisition still matters, but it is now the smaller half of the equation and the more expensive one.

Segment before building campaigns

- VIPs and high-LTV customers
- Previous BFCM buyers and recent purchasers
- Lapsed customers and high-AOV segments
- Category-specific and replenishment buyers

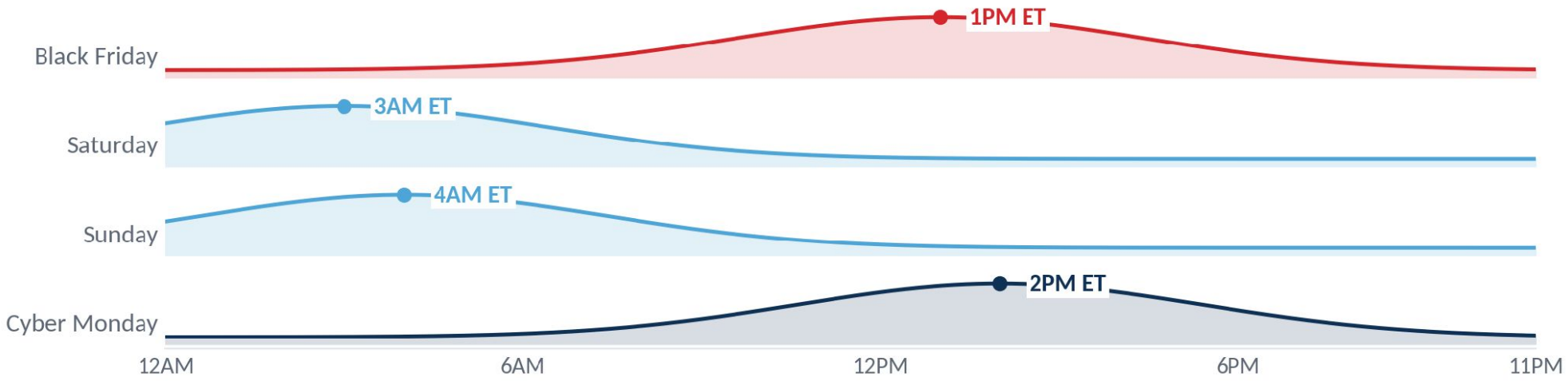


THE ACTION: Get the second-purchase flows live before the first BFCM order lands. A higher BFCM CAC only pays back if retention infrastructure is already running.

Source: Triple Whale BFCM benchmark

The Weekend Doesn't Behave the Same Every Day

Revenue distribution across the BFCM weekend is far less uniform than most reporting cadences assume. In 2025, Black Friday peaked at 1 PM ET and Cyber Monday at 2 PM ET, but Saturday peaked at 3 AM and Sunday at 4 AM.



Overnight peaks are not an anomaly to be explained after the fact. They are a staffing and monitoring requirement. A brand reviewing performance once each morning is making budget decisions roughly eight hours after the moment that mattered, on two of the four days.

THE ACTION: Report hourly, not daily, with overnight cover on revenue, ROAS, CPA, conversion and inventory velocity.

Source: Triple Whale BFCM benchmark

AI

The channel that reversed direction, and the readiness gap it exposed.

2026 ACTION: Make the catalog machine-readable by September.

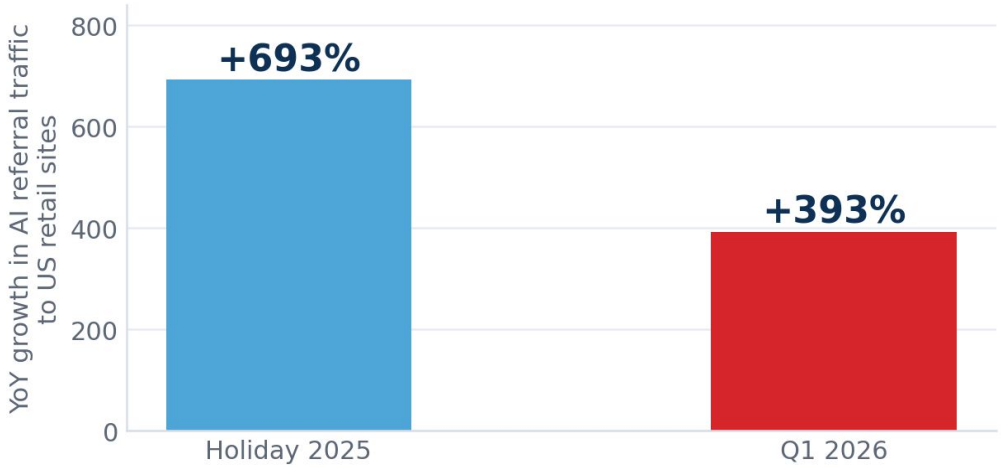
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AI Became a Real Channel

In 2026 AI stopped being a forecast. For two seasons, AI-driven shopping was discussed as a coming change. Adobe's analysis of more than a trillion visits to US retail sites puts AI referral traffic up 393% year over year in Q1 2026, following a 693% increase across the 2025 holiday period.

Growth of that magnitude off a small base invites a fair objection: large percentages on small numbers are easy to produce. That objection held a year ago. It does not hold now, because the second thing that changed was quality, not just volume.

Consumer adoption backs the traffic data. Attentive's research puts 67% of shoppers using AI somewhere in the shopping process, Klaviyo has more than half planning to use it specifically this season, and Similarweb finds 35% of US consumers now using AI at the product discovery stage against 13.6% using conventional search.



THE ACTION: Track AI referrals across every assistant, not just ChatGPT. Its share of generative AI traffic fell from roughly 76% to 53% by May 2026, with Gemini near 27% and Claude around 9%.

Source: Adobe Q1 2026 AI Traffic Report; Attentive; Klaviyo; Similarweb

Shoppers Are Bringing AI With Them

Adoption is no longer early. It is mainstream — and strongest in the segments that spend the most in Q4.

57%

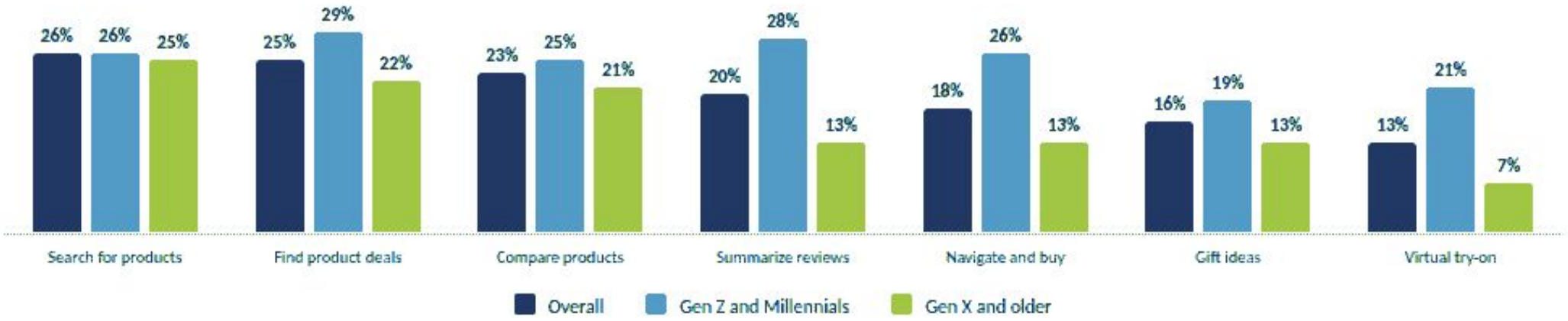
of holiday shoppers expect to use AI tools or chatbots during their shopping journey

68%

adoption among Gen Z and Millennials, against 49% for Gen X and older

1 in 4

already use AI to search for products (26%) and to find deals (25%)



Source: Tinuiti holiday survey, July 2026 (US consumers).

The Conversion Reversal

This is the finding that should change budget decisions. A year ago, shoppers arriving from AI tools converted worse than direct traffic. At Prime Day 2025, roughly 23% worse. As of Q1 2026 they convert 42% better than direct, with 37% higher revenue per visit, 48% more time on page and 13% more pages viewed.



Prime Day 2026 confirmed the pattern outside the holiday window, with AI-referred shoppers converting 40% better than site average. A reversal that holds across two very different commercial events in the same year is structural, not seasonal.

THE ACTION: Treat AI referrals as bottom-funnel traffic and land them on the page that closes, not the one that introduces. The assistant has already done the comparison work.

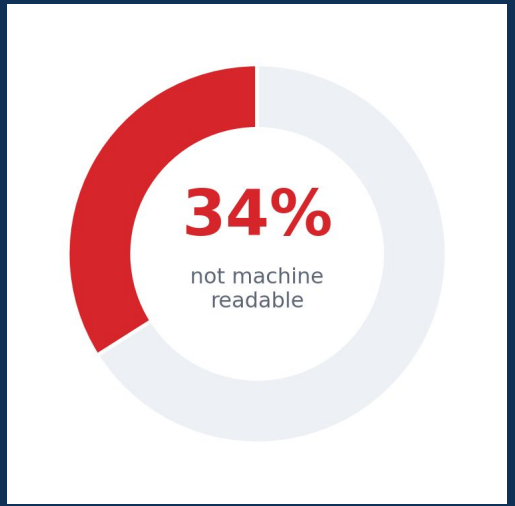
Source: Adobe Q1 2026 AI Traffic Report; Adobe 2026 Prime Day Insights

A Third of the Storefront Is Invisible

The traffic is arriving and converting. The problem is what it finds when it lands. Adobe's analysis found roughly 34% of retailer homepage content is not machine-readable, meaning invisible to the models now sending the highest-converting traffic on the site.

This is not a creative problem and it is not solved by writing more content. It is structural: product schema, crawlable text rather than text baked into images, complete and consistent feed attributes, and specification detail that a model can actually parse and compare.

It is also a September job. Schema and feed work has to be crawled, indexed and reflected in model outputs before it affects anything, and that does not happen on a two-week timeline in November.



20%	of 2026 holiday ecommerce traffic projected to come from AI agents
1 in 3	ecommerce sites will have a site-specific shopper agent by Cyber Week
+6.2%	growth for brands that ran shopper agents in 2025, against +3.9% without

Source: Adobe Q1 2026 AI Traffic Report; Salesforce 2026 Holiday Predictions

AI

What Machine-Readable Actually Means

A practical definition, in the order the work should be done.

Structured data

- Product schema on every PDP
- Offer, price and availability markup
- Review and aggregate rating schema
- Breadcrumb and category structure
- FAQ schema on high-intent pages

Crawlable content

- Specifications as text, not images
- Comparison tables in HTML
- Sizing, materials and compatibility stated
- No critical copy locked in JS-only render
- Alt text that describes, not decorates

Feed completeness

- GTINs, MPNs and brand fields populated
- Full attribute set per category
- Consistent naming across variants
- Sale price and promotion fields used
- Imagery meeting platform specs

THE ACTION: Ship schema, crawlable content and feed work as one project. The same product data that makes a catalog legible to an AI assistant is what wins paid Shopping placements.

Where Agentic Checkout Actually Lives

The agentic checkout landscape moved twice during 2026, in opposite directions. Planning against last year's assumptions will point effort at the wrong platform.

Google, expanded

Universal Commerce Protocol launched at NRF in January with Shopify, Etsy, Wayfair, Target and Walmart, plus endorsement from Visa, Mastercard, Stripe and Amex. By May a cross-retailer Universal Cart spanned Search, Gemini, YouTube and Gmail, with Affirm and Klarna in Google Pay. The merchant remains merchant of record.

OpenAI, retreated

Instant Checkout was pulled in March, roughly six months after launch. Fewer than about 15 Shopify merchants ever went live, and Walmart measured in-chat checkout converting around three times worse than a click through to walmart.com. ChatGPT pivoted to discovery-first with retailer apps.

Amazon, consolidated

Rufus was retired in May and merged with Alexa+ into Alexa for Shopping. It now sits in the main search bar, free to every signed-in US customer with no Prime or Echo requirement, and buys automatically at target prices.

THE ACTION: Invest in owned-site readiness and clean attribution rather than in-chat checkout. Discovery happens in AI; the purchase still happens on your own site.

Source: Google Shopping announcements 2026; CNBC, March 2026; GeekWire, May 2026

AI for Decision Velocity

The other use of AI this season has nothing to do with discovery. BFCM moves faster than a human reporting cycle, and with overnight peaks on two of four days, the gap between something happening and someone noticing is where margin is lost.

The highest-value application is not content generation. It is compressing the time between a signal appearing and a decision being made on it.

8 AM

Morning brief

What happened overnight? Revenue against forecast, winners and losers by campaign and SKU, inventory risk, and the budget moves that need to happen before 10 AM.

MIDDAY

Pacing check

Are we tracking to target? What changed since this morning? Where should budget shift, and which creative is accelerating right now?

EVENING

Wrap and forecast

Full-day review, tomorrow's forecast, inventory outlook, promotion performance, and the overnight budget plan for the hours nobody is watching.

THE ACTION: Run four questions on a loop, what happened, why, what happens next and what should we do, then tag every campaign scale, hold, reduce, pause or investigate. Our AdBeacon-fed briefs run that loop three times a day.

Amazon

A different funnel stage, and an assistant that moved into the search bar.

2026 ACTION: Fix retail readiness before scaling media.

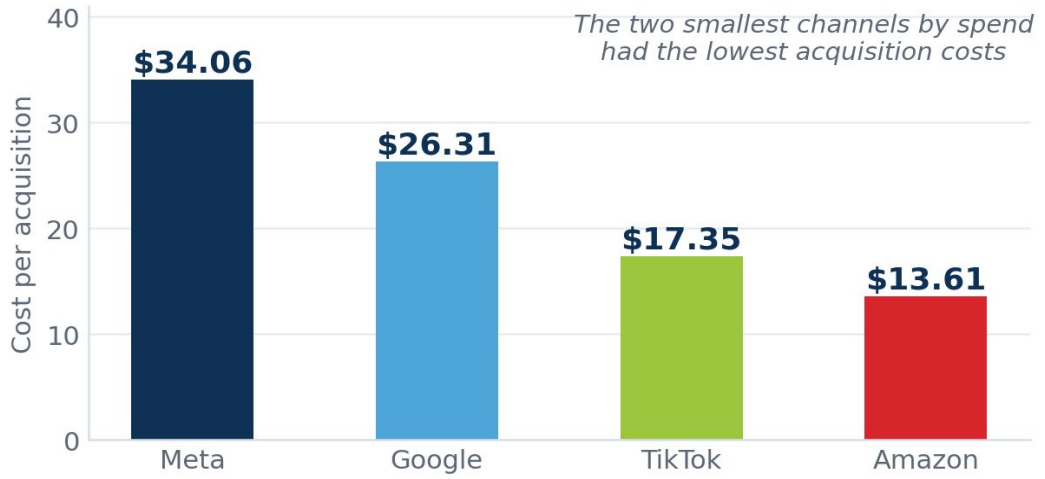
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Amazon Is a Different Funnel Stage

Amazon's benchmark numbers look outstanding in isolation: 2.82% of total ad spend, 3.07X reported ROAS, and a $13.61 CPA, less than half of Meta's $34.06. Read as a comparison of channel efficiency, that suggests budget should move.

Read correctly, it suggests something different. The CPA is low because Amazon shoppers arrive already deep in the purchase funnel. The platform mostly converts marketplace intent that already exists, sitting closer to the point of purchase than prospecting channels do. Comparing its CPA to a prospecting channel's is comparing a closer to a lead generator.

Which means Amazon budget cannot simply be scaled the way a prospecting channel can. Beyond a point, spending more does not find more intent. It just pays more to capture the same intent.



THE ACTION: Fix retail readiness before a single ad runs. Inventory, ranking, review velocity, pricing and promotions have to be right, because ads amplify the listing rather than fix it.

Source: Triple Whale BFCM benchmark

AMAZON

The Assistant Moved Into the Search Bar

In May 2026 Amazon retired the Rufus brand and merged it with Alexa+ into Alexa for Shopping. The change is larger than a rename. It moved from a side panel most shoppers ignored into the main search bar, and became free to every signed-in US customer with no Prime membership or Echo device required.

Auto-buy

Purchases automatically when a tracked product reaches a customer's target price, with no return visit.

Scheduled Actions

Standing recurring purchases handled on the customer's behalf, removing replenishment from the browse cycle.

Buy For Me

Completes purchases at off-Amazon retailers, extending the assistant beyond Amazon's own catalog.

For sellers, the consequence is that a growing share of demand resolves inside the assistant's answer rather than on a results page. When that happens, the inputs the assistant reads become the ranking factors, and those inputs are catalog hygiene, structured attributes, review depth and PDP completeness.

THE ACTION: Treat catalog hygiene as a performance lever, not housekeeping. The same work improves conversion for human shoppers.

Source: Amazon Ads agentic shopping guidance, June 2026; GeekWire, May 2026

AMAZON

Win the Digital Shelf

Before November: forecast inventory, establish safety stock and fully optimize PDPs. Everything below assumes that groundwork is done, because ads cannot compensate for a listing that is not ready.

1

Before

Build organic ranking and review velocity while CPMs are still cheap. Establish retargeting audiences early so the expensive weeks are spent converting rather than prospecting. Confirm inventory depth against forecast, not against last year.

2

During

Defend brand terms aggressively, competitors will bid on them. Attack category and competitor searches where your listing is genuinely stronger. Maximize hero ASIN visibility and keep deal badges live through the window.

3

After

Retarget everyone who viewed but did not buy. Cross-sell into the base acquired during the window. Capture gift card redemption in Q5 and move excess inventory before it becomes a storage cost.

THE ACTION: Plan Amazon Q5 before December. Gift card redemption and self-gifting run well past December 26, against far less competition.

Channels & Creative

Where the dollars went, what they returned, and how to pace a shorter season.

2026 ACTION: Diversify spend and build the creative library before November.

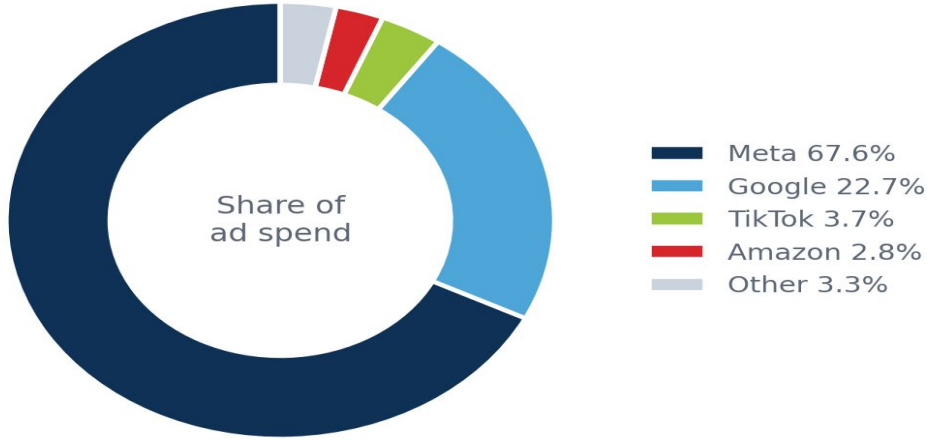
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Where the Dollars Went

Spend is still heavily concentrated in Meta. A benchmark across 33,000 stores puts Meta at 67.6%, Google 22.7%, TikTok 3.7% and Amazon 2.8%.

The distribution is the story. Nearly 68% of spend sat in the channel with the highest CPA, while the two smallest channels by spend delivered the lowest acquisition costs in the set. That is not necessarily wrong, since Meta carries prospecting volume the others cannot, but it means the portfolio is exposed to a single platform's auction dynamics during the highest-cost weeks of the year.

The most useful signal in the 2025 data is directional: Meta and Google both lost share, while emerging platforms gained it. In a compressed season with rising costs, concentration stops being a convenience and becomes a margin decision.





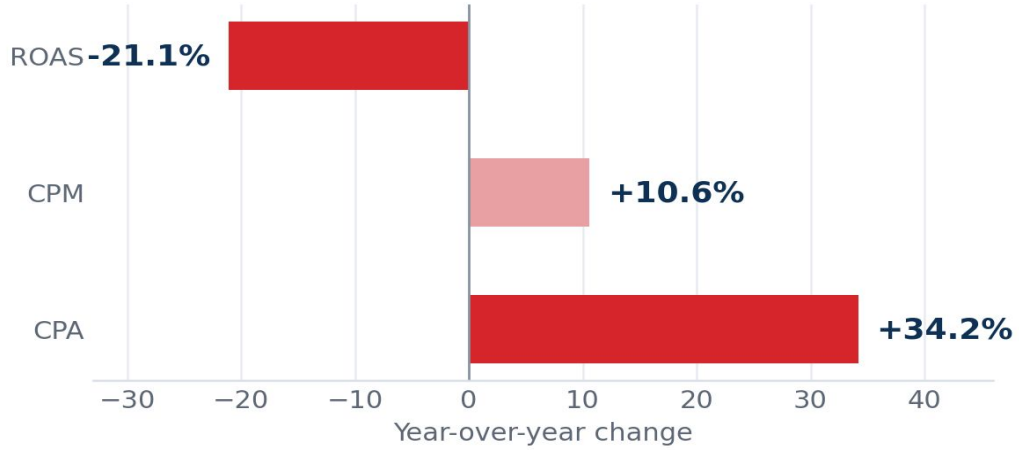
Source: Triple Whale BFCM benchmark, 33,000 stores

Google: Strongest ROAS, Rising Costs

Google delivered the strongest reported ROAS of the three largest channels at 3.62X. It also got materially more expensive: ROAS down 21.1% year over year, CPM up 10.6%, and CPA up 34.2%.

A 34% increase in acquisition cost against a 21% decline in return is the kind of movement that usually triggers a budget cut. Before making one, the account needs to be separated. Blended Google ROAS mixes brand search, non-brand search, Shopping, Performance Max and Demand Gen, campaign types with completely different jobs.

Brand search will always report well; it is capturing demand created elsewhere. If that sits inside a blended number, it flatters everything around it and hides whether the prospecting campaigns are actually working.



THE ACTION: Split brand from non-brand before you touch the budget, then ask whether Google generated incremental demand or captured demand that already existed.

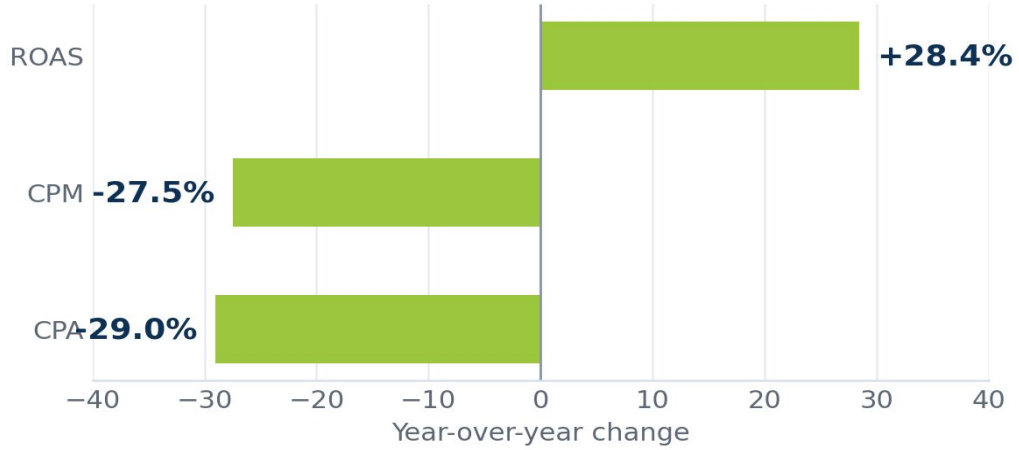
Source: Triple Whale BFCM benchmark

TikTok Was the Breakout Channel

TikTok moved in the opposite direction on every metric that matters. ROAS up 28.4% year over year, CPM down 27.5%, CPA down 29%, at a $17.35 acquisition cost, roughly half of Meta's.

That combination of rising returns alongside falling costs is unusual and typically short-lived. It reflects a platform whose ad product has matured faster than advertiser demand has caught up. At 3.66% of total spend, most brands are still treating it as an experimental line item.

The creative requirement is the reason many hesitate, and it is real. Repurposed Meta assets underperform badly here. The principle that works: don't make TikTok ads, make TikToks that happen to sell products.



Ecosystem	Search, affiliate, TikTok Shop and GMV Max working together
Creators	UGC and authentic demonstration from trusted voices
LIVE	Real-time engagement with direct purchase paths

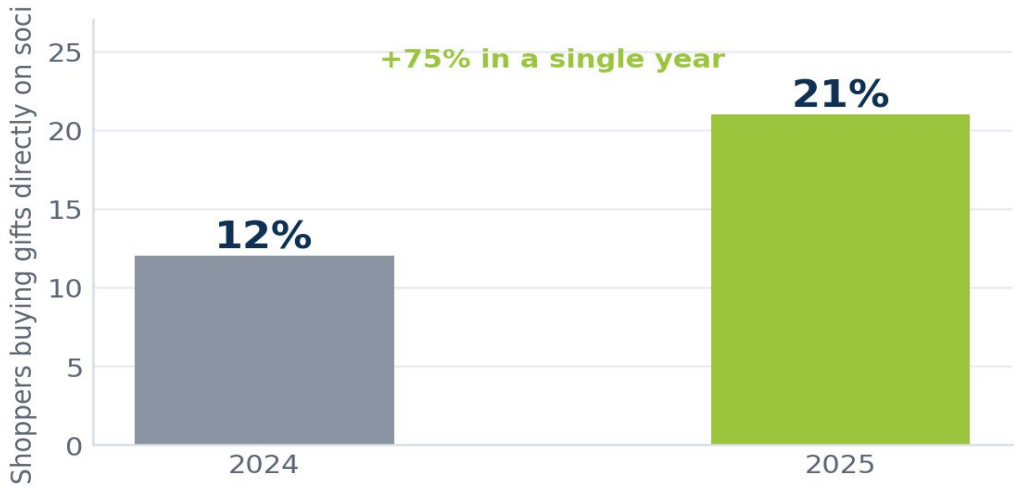
Source: Triple Whale BFCM benchmark

Social Also Became a Checkout

This is distinct from the channel economics above. Those numbers describe social as a media buy. This describes social as the place where the transaction completes, and it nearly doubled in a year, from 12% of shoppers buying gifts directly on social in 2024 to 21% in 2025.

US social commerce passes $100 billion in 2026, growing 18% year over year. TikTok Shop alone drove around $500 million in GMV over the BFCM weekend, with brands above $10 million growing 76%.

The measurement implication matters more than the growth figure. Social-as-media and social-as-storefront have different economics, different attribution paths and different margin profiles. Blended into one line, they hide each other.



Pinterest: the underweighted channel

- Incremental ROAS of 3.71 across the seasonal window
- More than half of incremental sales from new buyers
- 28% ROAS improvement for SMBs on ROAS bidding

Source: eMarketer holiday outlook 2026; Pinterest 2026 seasonal guide; Adobe

Creative Is Targeting Now

As platform targeting controls have narrowed, creative has absorbed the job. The asset itself now determines who sees it, so changing a headline, a background color or a product angle is not diversification. It is the same ad wearing a different shirt.

Real variation happens on five axes. A creative library that varies on all five will find audiences that a library of twenty color variants never reaches.

Persona

Who are we speaking to? A gifter and a self-shopper need different opening frames.

Problem

Which pain point does this open on? The same product solves several.

Mechanism

Why does this actually work? Demonstration beats assertion.

Format

UGC, demo, testimonial or comparison, each reaches differently.

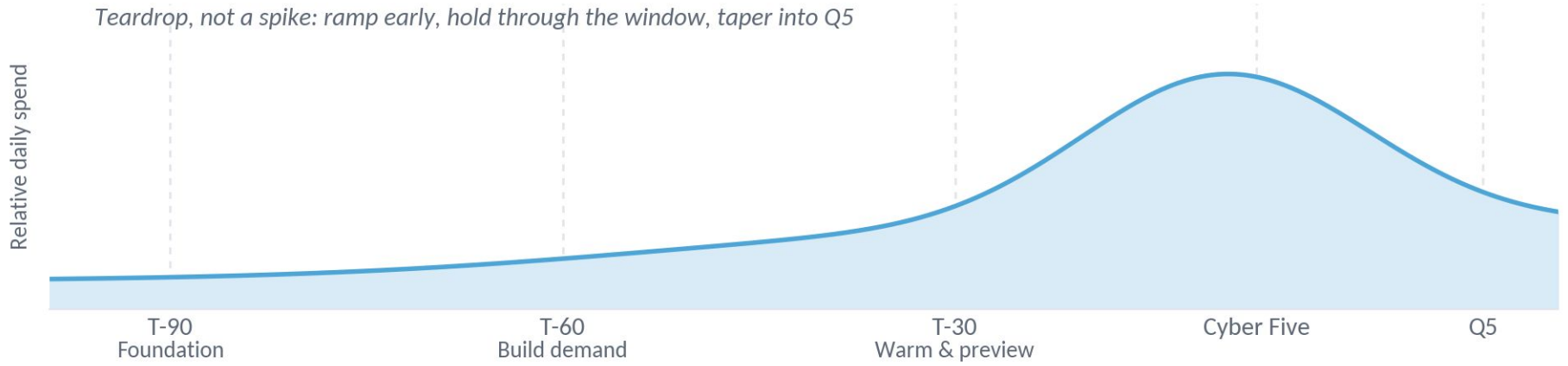
Emotion

Urgency, aspiration, confidence, relief or belonging.

THE ACTION: Build the creative war chest before November across hero product, gifting, bundles, UGC, testimonials, demos, comparisons, creator content, urgency, shipping cutoff, self-gifting and Q5. Watch for rising frequency alongside falling CTR, and produce the replacement before the winner collapses.

Pacing a Shorter Season

Budget shape matters more in a compressed season than in a normal one. The common failure is a spike: hold spend flat through October, then triple it on Black Friday morning. That approach pays the highest CPMs of the year to reach audiences the account has never seen, while delivery systems are still learning.



A teardrop works better. Ramp from roughly 90 days out to build audience and let the algorithm learn, hold through the window, then taper into Q5 rather than switching off on December 1. A cold-started account typically needs 24 to 48 hours to stabilize, time that does not exist inside a four-day window.

Source: Meta Holiday Playbook 2026; agency spend-curve analysis

Measurement

Every platform claims the sale. Decide what good looks like before they do.

2026 ACTION: Run MMM on 2025 BFCM and model incremental 2026 spend.

NATIONAL POSITIONS

MEASUREMENT

ROAS Alone Is Not Enough

During BFCM, Google claims the sale. Meta claims it. TikTok claims it. Email claims it. Sum the platform-reported revenue across an account during Cyber Week and it routinely exceeds the actual revenue in Shopify, sometimes by a wide margin.

This is not a bug in any single platform. Each is reporting honestly within its own attribution window and its own view of the customer journey. The problem is that those views overlap, and nobody reconciles them.

The attribution problem	Every platform cannot receive 100% of the credit for the same transaction. Platform-reported ROAS is a claim, not a measurement.
The solution	Keep one consistent cross-channel measurement model for the entire season, chosen before it starts. AdBeacon is how we hold that single view steady across every channel.
Avoid manipulation	Do not change attribution models mid-campaign because one produces a more favorable number. That is not analysis; it is rationalization.

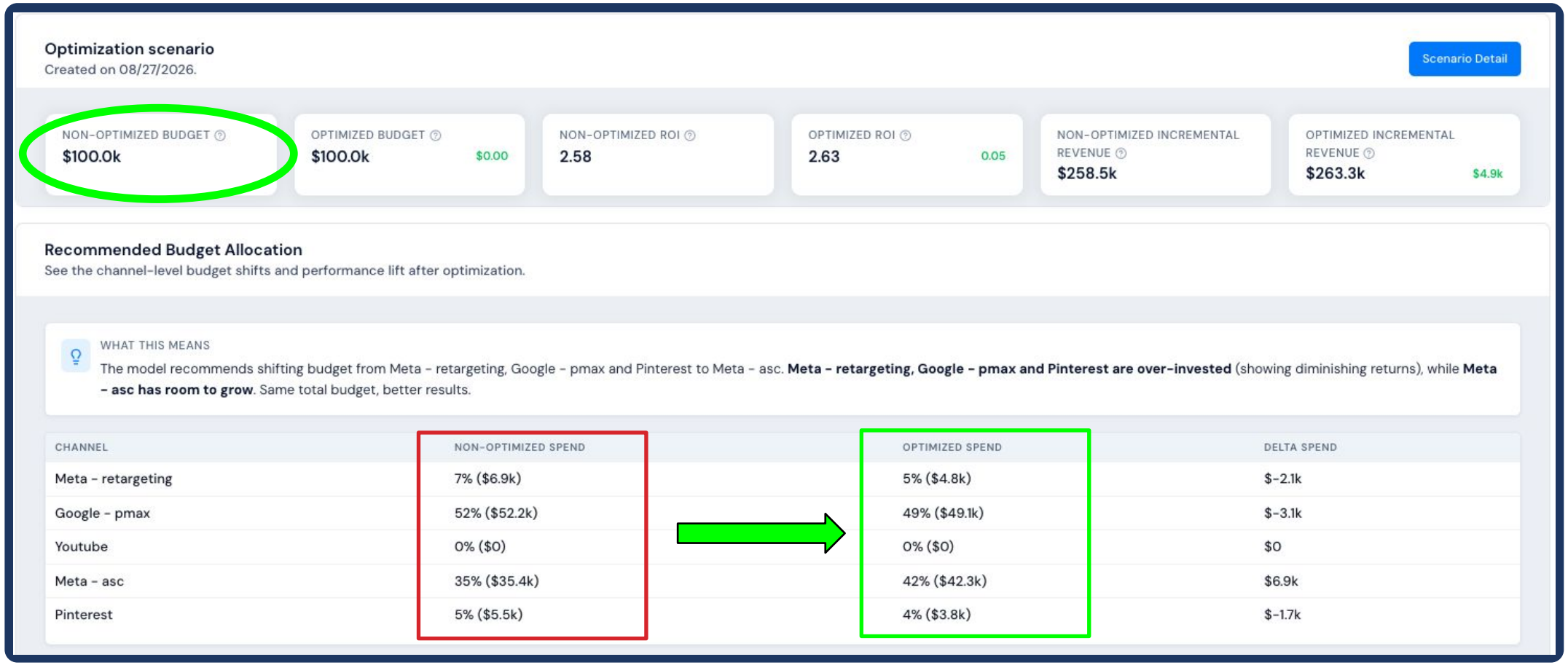
THE ACTION: Pick one cross-channel model in September and hold it, then ask the better question for 2026: where can I confidently invest my next dollar without sacrificing profitability?

MEASUREMENT

Let MMM Decide Where the Next Dollar Goes

NATIONAL POSITIONS

Use last year's BFCM to decide where this year's dollars go: run prior performance through MMM → find diminishing returns and scaling headroom → optimize the existing budget → model a What If on another $100K → send incremental dollars where return is highest.



Optimization scenario
Created on 08/27/2026.

Scenario Detail

NON-OPTIMIZED BUDGET	OPTIMIZED BUDGET	NON-OPTIMIZED ROI	OPTIMIZED ROI	NON-OPTIMIZED INCREMENTAL REVENUE	OPTIMIZED INCREMENTAL REVENUE
$100.0k	$100.0k $0.00	2.58	2.63 0.05	$258.5k	$263.3k $4.9k

Recommended Budget Allocation
See the channel-level budget shifts and performance lift after optimization.

WHAT THIS MEANS
The model recommends shifting budget from Meta - retargeting, Google - pmax and Pinterest to Meta - asc. **Meta - retargeting, Google - pmax and Pinterest are over-invested** (showing diminishing returns), while **Meta - asc has room to grow**. Same total budget, better results.

CHANNEL	NON-OPTIMIZED SPEND	OPTIMIZED SPEND	DELTA SPEND
Meta - retargeting	7% ($6.9k)	5% ($4.8k)	$-2.1k
Google - pmax	52% ($52.2k)	49% ($49.1k)	$-3.1k
Youtube	0% ($0)	0% ($0)	$0
Meta - asc	35% ($35.4k)	42% ($42.3k)	$6.9k
Pinterest	5% ($5.5k)	4% ($3.8k)	$-1.7k

THE ACTION: Don't set BFCM budgets on last click, platform ROAS or intuition. Same $100k budget, better outcome: the model moves spend out of Meta retargeting, Google PMax and Pinterest, all showing diminishing returns, and into Meta ASC, lifting ROI from 2.58 to 2.63 and incremental revenue by $4.9k.

AD BEACON

MEASUREMENT

Decide What "Good" Means Before BFCM

This conversation belongs in September, not on Friday morning while everyone is staring at dashboards. Once the window opens, there is no time to agree on definitions, decisions get made on whichever number is loudest.

Align marketing and finance

- Break-even incremental ROAS, agreed and written down
- Contribution margin floor by product family
- New customer CAC target, and the LTV it assumes
- MER target for the season
- Maximum scalable budget before returns break

Create channel guardrails

- Starting budget per channel
- Maximum daily budget per channel
- Required minimum return before a pause
- Reallocation triggers, defined numerically
- Who has authority to move budget, and when

No single metric answers the question alone. Attribution: what received credit. Incrementality: what actually caused additional sales. MMM: where budget is creating incremental return. What If analysis: where the next dollar should go. The stack matters more than any one layer, and AdBeacon is where we run it in one place.

THE ACTION: Set the targets and the guardrails in September, then let the season run against them.

MEASUREMENT

Turn Measurement Into Action

Accurate measurement only earns its keep if it changes a decision. Four inputs turn a reporting stack into an operating rhythm for the season.

Data

First-party, server-side performance data is the foundation. Platform numbers are claims made by the platform grading its own homework; server-side data is a more durable basis for reconciling channel performance against actual orders and revenue.

In practice: consolidate every channel against one first-party click dataset

Context

Connect the accounts by API so the plan is built on what actually happened rather than on last year's assumptions. Know where, when and how the next dollar should go.

In practice: build the plan at campaign and SKU level, not channel level

Contingency

Write the pivot plans before the window opens. If pacing turns red on Friday morning, the alternative budget shape should already exist and the trigger for using it should already be agreed.

In practice: define reallocation triggers numerically, in September

Timing

September is the test window. Trial promotions, products, audiences and channels now, so that Q4 harvests something already proven rather than something being learned at peak CPMs.

In practice: build interest now, harvest it in Q4

THE ACTION: Run all four inputs off one stack. AdBeacon, our proprietary attribution platform, holds that stack in one place across Google, Meta, TikTok, Amazon, Shopify, GA4 and Klaviyo.

MEASUREMENT

Ask Customers Why They Bought

Pixels record what happened. They do not record why. A post-purchase survey fielded within 24 hours captures zero-party attribution that no measurement stack can reconstruct, and during BFCM, when attribution is at its noisiest, it is often the cleanest signal available.

How did you first hear about us?	Catches the channel that created demand, not the one that closed it
What made you decide to buy today?	Separates offer-driven from intent-driven purchases
Who or what is this purchase for?	Identifies gifter versus self-shopper for post-season segmentation
What would help you get more from this?	Feeds the second-purchase flow and reduces returns

THE ACTION: Field a post-purchase survey within 24 hours, and judge BFCM customers on 30, 60 and 90-day LTV rather than on November 30.

Merchandising

Four shoppers, offer architecture, and the checkout most of them will use.

2026 ACTION: Optimize for contribution margin, not discount depth.

NATIONAL POSITIONS

Four Shoppers, Not One

Yotpo's survey of 1,100+ global shoppers produced the cleanest segmentation available for this season. Four distinct buyers, each with a different trigger, timeline and response to the same offer.

The Gifter

Buys for other people. Responds to gift guides, curated collections and recipient-based navigation. Delivery confidence outweighs price, a missed date is a failed gift.

Lead with: recipient navigation, delivery guarantees, gift wrap

The Strategist

Researches for weeks and builds a list. Waits deliberately for the window. Responds to early access and transparent pricing; manufactured urgency reads as manipulation.

Lead with: VIP early access, price transparency, comparison detail

The Spontaneous Gifter

Late, fast and high-urgency. Decides in minutes. Won or lost on shipping cutoffs, gift cards and whether mobile checkout works on the first attempt.

Lead with: cutoff countdowns, gift cards, one-tap payment

The Self-Shopper

Buying for themselves during a gifting season. Responds to premium framing and treat language; gift messaging actively misses them.

Lead with: treat framing, premium tiers, personal-use benefits

THE ACTION: Build a separate offer and creative track for each of the four shoppers, and recognize the same person across email, SMS, site and store. 82% now expect that.

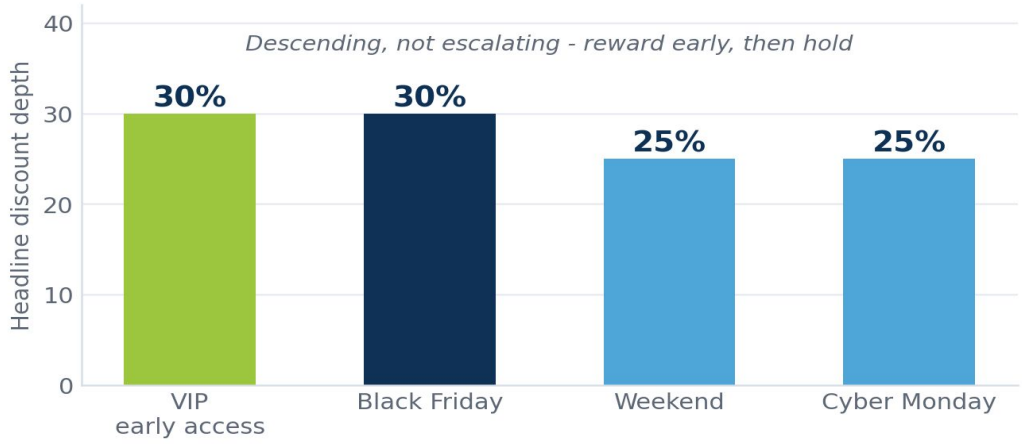
Source: Yotpo BFCM Blueprint 2026; Braze BFCM Consumer Trends 2026 (7,000 shoppers)

Trust Beats Discount Depth

Price skepticism ranks among the top consumer trends in Braze's 7,000-shopper study across five markets. Shoppers assume the BFCM discount is theater, that the pre-sale price was inflated to make the sale price look better, and they validate before buying.

Once that assumption is in place, deeper discounting stops working as a persuasion tool. What moves the shopper is evidence: reviews, comparison detail, guarantees, stated delivery dates, return terms and visible social proof. Validation signals now do more conversion work than another five points off.

Structure matters as much as depth. A descending ladder, with the strongest offer going to VIP early access and then holding, outperformed escalating discounts in 2025. Early-access buyers spent roughly twice as much per order, with 65% higher open rates on the access email.



THE ACTION: Put the discount on the product, not in a coupon code. Google Shopping and Meta surface strikethrough pricing automatically when the discount sits at product level; a code entered at checkout is invisible to both.

Source: Braze BFCM Consumer Trends 2026; Yotpo; Growth Suite

Build an Offer Architecture

Most BFCM offers are chosen rather than designed: a percentage is picked, applied sitewide, and the margin consequences are discovered in January. An offer architecture inverts that. The economics are set first, and the promotion is built inside them.

Decide before Q4 opens: contribution margin floor, hero SKUs, inventory thresholds, revenue targets, bundle construction and free shipping thresholds. Then build flexibility around that foundation rather than against it.

The principle	The deepest discount does not automatically produce the greatest profit. A 40% sitewide cut that moves marginal inventory at negative contribution is a worse outcome than a 20% cut on hero SKUs with a gift-with-purchase attached.
The goal	Optimize toward incremental contribution margin, not top-line revenue. Revenue records are easy to set and expensive to celebrate.
The execution	Test tiered spend thresholds, gifts with purchase and exclusive bundles. Each lifts AOV without cutting the headline price, which protects both margin and price perception into Q1.

Mobile Is the Main Checkout

70% of Cyber Week orders were placed on mobile. 79.4% of US Cyber Monday BNPL transactions were mobile. Shop Pay alone accounted for 32% of Shopify merchant orders, growing 39% year over year.

BFCM conversion optimization is therefore mobile conversion optimization. Not a variant of it. It is the whole exercise. Every additional second of load time and every extra checkout step becomes more expensive at peak traffic, because the traffic arriving is more expensive.

The pre-season test is not a Lighthouse score. It is buying your own product, on a real phone, with a real discount code, and watching what breaks.



Speed	Compress hero images, cut unnecessary scripts, audit installed apps, test Core Web Vitals under load
Checkout	Purchase on a physical device. Test discount codes, shipping validation, error states and cart persistence
Payment	Enable and individually test Shop Pay, Apple Pay, Google Pay, PayPal and every BNPL option

Source: Salesforce Cyber Week data; Shopify

Holiday Preparation

Where each workstream has to land, and by when.

2026 ACTION: Lock the cadence and the readiness checklist before October.

NATIONAL POSITIONS

The 2026 Campaign Cadence

The list you enter November with is largely built by September. Everything below assumes that sequencing, because each phase produces the input the next phase depends on.

JUN - SEPT

Foundation

Unit economics agreed with finance. Inventory forecast and safety stock set. Consented audience growth across email, SMS, retargeting and loyalty. Tracking validated end to end. Labor Day doubles as the offer dress rehearsal.

OCT - NOV 19

Build demand

Gift guides, quizzes, wish lists and product education. Ads live mid-October so delivery finishes learning. Creative library complete. Feeds audited and clean.

NOV 21 - 26

Sneak preview

VIP early access with the strongest offer of the season. Inventory priority for the base. Offer preview to the warmed list. Early-access buyers spent 2x more per order in 2025.

NOV 27 - DEC 1

Conversion

Flagship Friday offer. Weekend bundles and social proof. Monday deadline bonus. Hourly monitoring with overnight cover.

THE ACTION: Enter November talking to people who already know the brand, rather than paying peak CPMs to introduce it.

HOLIDAY PREPARATION

2026 BFCM Readiness Checklist

Bad data becomes extraordinarily expensive during BFCM, because every error is multiplied by peak traffic and peak CPMs. Validate all of this before demand arrives.

Strategy & Data

- Revenue and profit targets agreed
- Channel budgets and promo calendar locked
- Pixels and CAPI firing correctly
- UTM taxonomy consistent across channels
- Attribution model chosen and frozen
- GA4 configured and tested under load

Commerce & Marketing

- Inventory forecast and safety stock
- Feeds audited, PDPs optimized
- Product schema and crawlable content live
- Mobile CRO and checkout tested on device
- Payments and every BNPL option enabled
- Creative library, flows and audiences ready

Ops & Measurement

- Fulfillment and carrier capacity confirmed
- Customer service staffing plan by day-part
- Escalation paths and owners defined
- MER, CAC and contribution margin tracked
- Incrementality tests scheduled
- Overnight monitoring cover assigned

12 Rules for Winning BFCM 2026

1. **Start earlier**
   Demand begins well before Black Friday
2. **Treat November as a campaign**
   Not a weekend
3. **Prioritize existing customers**
   Returning revenue is now the majority
4. **Design mobile first**
   It is the primary checkout, not a variant
5. **Build an offer architecture**
   Don't just pick a discount
6. **Protect margin**
   Optimize contribution, not revenue alone
7. **Diversify channels**
   TikTok efficiency is significant and underused
8. **Build for AI discovery**
   Product data matters more than ever
9. **Create different creative**
   Not just more versions of the same one
10. **Measure incrementality**
    ROAS doesn't tell the whole story
11. **Use AI for decision velocity**
    BFCM moves faster than a daily report
12. **Think beyond the first transaction**
    Profitability continues into Q1

Predictions & Recommendations

What we expect

- AI-driven discovery keeps compounding, agent traffic reaches roughly 20% of holiday sessions
- Acquisition costs stay elevated; Google CPA pressure continues into Q4
- Retention carries more than half of BFCM revenue for a second consecutive year
- Social commerce grows fastest as a transaction channel, not just a media channel
- Discount depth flattens; trust signals and value framing do the persuasion work
- Agentic checkout consolidates around Google's UCP rather than fragmenting further

What to do about it

- Make the site machine-readable before October, schema, crawlable content, complete feeds
- Move launch to mid-October so delivery systems finish learning before compression
- Build and warm segments now; strongest offer to VIP early access first
- Structure discounts at product level rather than as coupon codes
- Lock one attribution model in September and hold it through the season
- Plan Q5 before December: gift card redemption and self-gifting are the cheapest volume of the year

How the National Positions Team Can Help

Budget pacing and performance	Revenue pacing and budget reviewed weekly or daily, with channel-specific opportunities to shift spend into performance and alerts when scaling headroom appears.
Creative insight and feedback	Weekly creative review, pivot strategies and A/B testing insight, so fatigue is caught before it costs you the window rather than after.
Attribution through AdBeacon	AdBeacon, our proprietary attribution platform, gives one consistent cross-channel view of what is actually driving incremental revenue, held steady through the season.
AI-assisted monitoring	Morning, midday and evening intelligence briefs across Google, Meta, TikTok, Amazon, Shopify, GA4 and Klaviyo, including the overnight hours when two of four BFCM days peak.

WORKING TOGETHER

Next Steps BFCM 2026

Treat BFCM as a lifecycle moment rather than a weekend. The brands that win this season will have integrated data, loyalty and retention long before the window opens.

Start Q3 now

Segment the customer base and launch loyalty and VIP mechanics early.

Upgrade tracking

Implement advanced attribution through AdBeacon before October, not during November.

Plan early, extend the timeline

Start campaigns in September and October, then carry momentum into Q1 2027.

Make the site legible to AI

Product schema, crawlable content and complete feeds, a September deadline.

Diversify channels

Reduce reliance on any single platform and test the emerging ones with real budget.

Build the retention engine

VIP programs, win-back flows and personalized offers, live before the first BFCM order.

Let's win the holidays together

Contact us today:

nationalpositions.com/contact/