BLACK FRIDAY

2025

WHERE POST-BLACK FRIDAY PATTERNS REDEFINE ATTENTION, CREDIBILITY, AND RETAIL IMPACT.

LOXIAS®

Analysis period: November 4 to December 4, 2025
Supporting tools: Brandwatch

This study explores online conversations after *Black Friday*

As the Black Friday and Cyber Monday cycle comes to an end, the conversation shifts from anticipation to outcomes — no longer about what people planned to buy, but about **what truly moved the market**. The **Post–Black Friday & Cyber Monday Report** goes beyond metrics, translating **consumer behavior**, **category momentum**, and **brand performance** to reveal how retail is evolving.

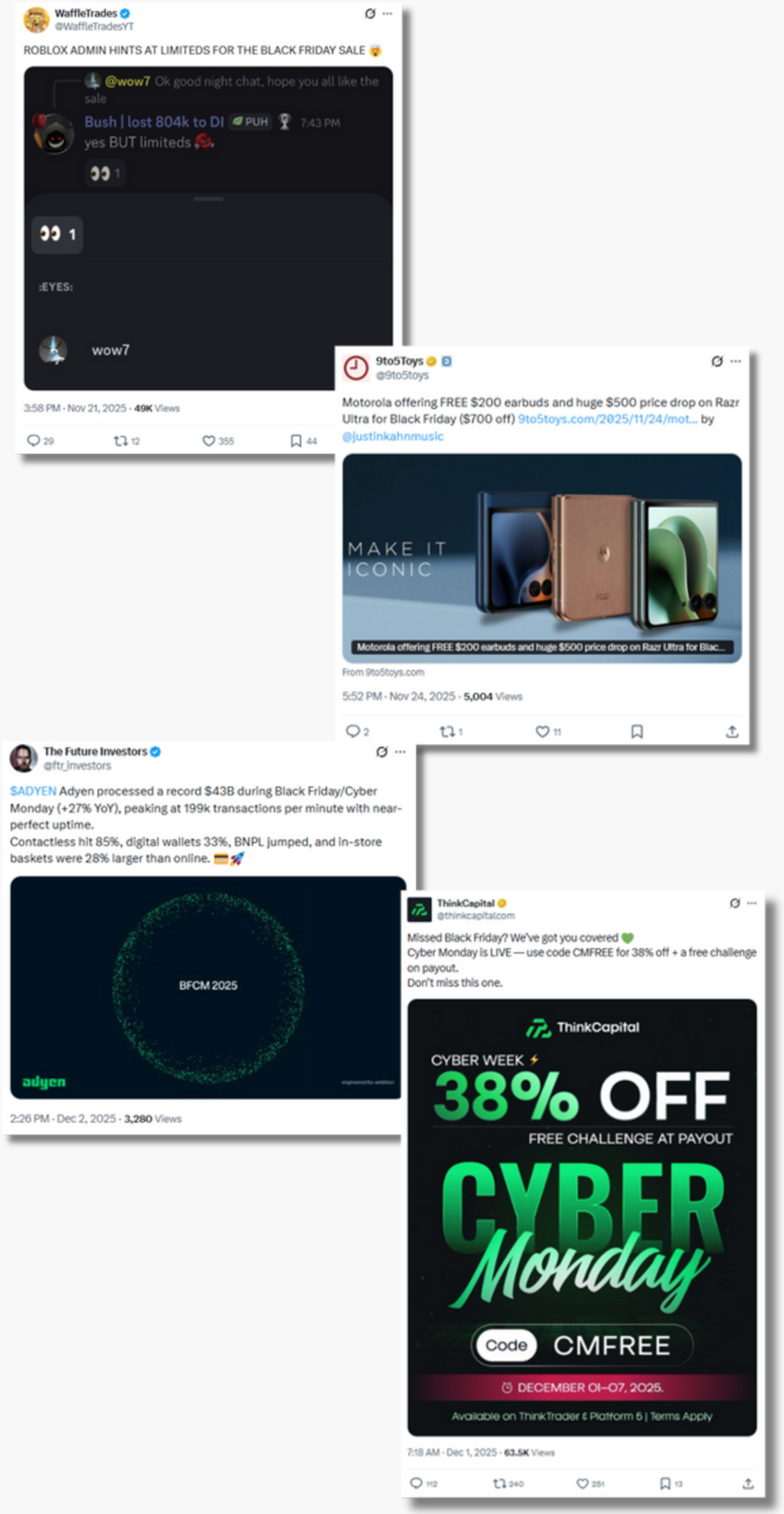
This report captures a **retail landscape in transition** — one where performance depends not only on the discounts offered, but on **how brands interpret timing**, **trust signals**, and **the emotional logic behind each purchase decision**. By decoding the **real drivers of demand** and the behaviors that shaped this year's cycle, the study provides **strategic clarity** for leaders who need to anticipate **the next move in an increasingly competitive digital market**.

Narratives What are the main themes in the conversations about Black Friday?

The digital conversation highlights **specific products** — such as the Motorola Razr, Samsung Galaxy, and Tessan chargers — alongside widely used e-commerce terms like sale, giveaway, and deal. A significant portion of the discussion focuses on **shipping and delivery issues, particularly delays, damaged items, and frustrating post-purchase experiences**. Positive descriptors such as **"perfect," "nice," and "amazing"** appear in comments about product quality, while parallel themes — including **Roblox** and **entertainment** — broaden the conversation during the promotional period.

Clear trends emerge around the rise of **online shopping**, the growing use of **buy now, pay later**, and the spike in **logistics complaints** tied to the seasonal surge in orders. Attention also gravitates toward digital events such as the **"Black Friday 2025 Hangout."** High-impact keywords — **"sale," "shipping," "order,"** and brands like **Motorola**, **Samsung**, and **Tessan** — reinforce the focus on consumption and the overall shopping experience. At the same time, discussions around **service quality, delivery performance, and product costs** help shape a broader understanding of consumer expectations.

Sentiment is mixed: positive reactions to product quality contrast with frustrations about logistics and unmet expectations. Neutral mentions, often more factual or descriptive, make up a significant share of the dataset. Topics such as **Roblox, climate, and service performance** show signs of **polarization**. High-reach content includes **aggressive promotions, pricing errors in bundles, game updates**, and even declining viewership in broadcasts tied to the shopping season. Overall, the analysis shows that Black Friday acts as **a catalyst for conversations about products, delivery, pricing, brand performance, and customer experience**,.



Enhanced analysis using Loxias proprietary Machine Learning algorithms to identify centrality points in public conversations.

Real Results Black Friday

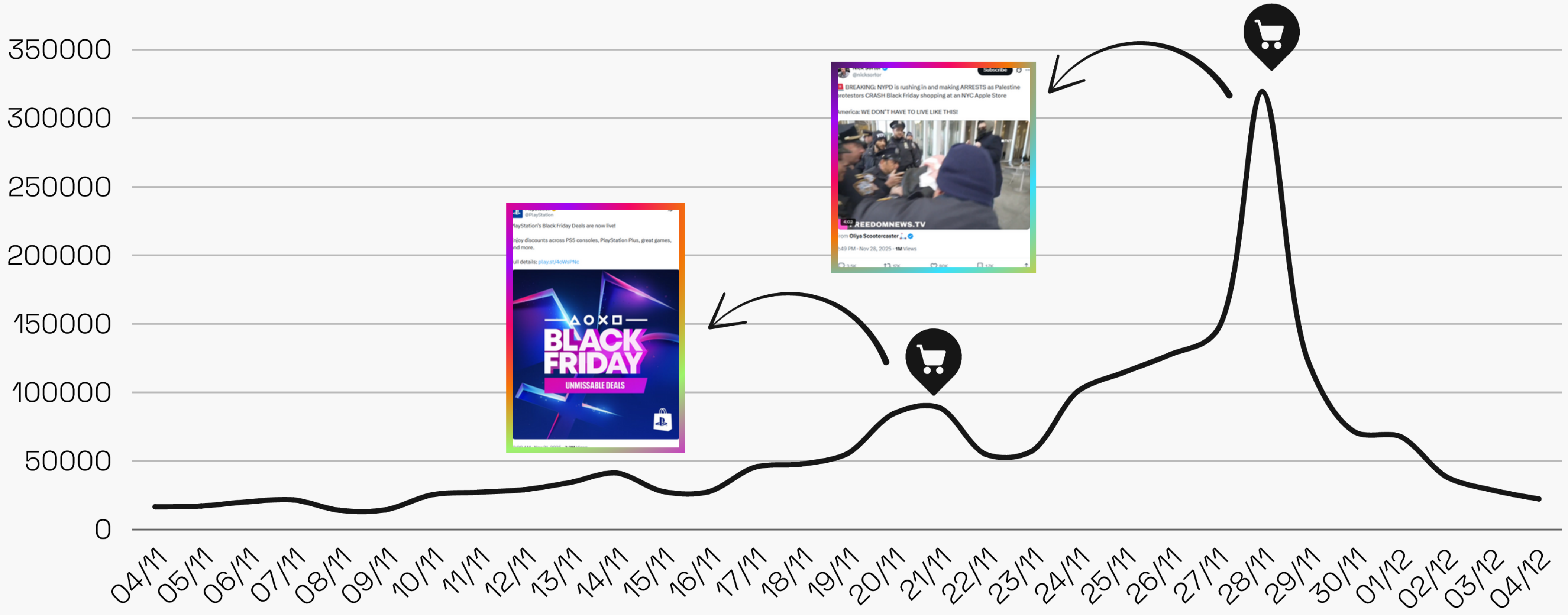
1.9M
MENTIONS
+921%*

739.8K
UNIQUE AUTHORS
+684%*

6.3B
REACH
+1.979%*

*PREVIOUS PERIOD: OCTOBER 3 TO NOVEMBER 3

Mentions over time



Black Friday 2025 recorded **1.9M mentions**, **739.8K unique authors**, and **6.3B in reach**, driven by brand campaigns, cultural triggers, and unexpected attention peaks on X.

Key movements throughout the month

- **Early acceleration (mid-November)** Major brand campaigns — including PlayStation's post — boosted momentum by activating fandoms and shoppers already anticipating seasonal deals.
- **External-event spike (late November)** The viral impact of Nick Sortor's video briefly shifted the focus of the conversation, illustrating how social tensions can directly influence overall volume.
- **Black Friday weekend — peak convergence** Promotions, viral content, and urgency combined to produce the period's highest spike, reinforcing the moment as a cultural event rather than a purely commercial one.

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Stability, signals, and the new logic of *User Behavior*

Brand Health Index

5.39 13% Previous period: 6.22

Black Friday 2025

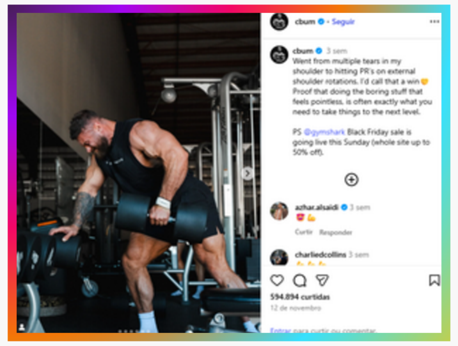
Can improve	Regular	Good	Very Good
0–3	3–6	6–8	8–10

The BrandHealth Index is a proprietary metric developed by Loxias that uses statistical calculations based on the polarity of mentions.

Share by sentiment

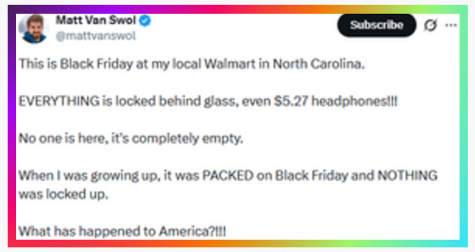
Neutral	Positive	Negative
69%	16%	15%

Top posts by sentiment



Reach: 12M

Reach: 54M



Reach: 11M

- **Resilience despite the decline**

The Brand Health Index fell to **5.39 (-13%)** following an increase in consumer complaints — criticism about product quality, irony around prices that "didn't really drop," and negative reactions to stores locking items behind cases. While these issues pressured the score, the overall impact remained contained: most mentions are neutral, indicating stability even within a more tense cycle.

- **Rational and balanced engagement**

Neutral content (69%) dominates the conversation, driven largely by **news coverage and event announcements** with no value judgment — inflating volume without shifting perception. Positive peaks stem from aspirational, lifestyle-oriented posts, while **negative mentions (15%)** reflect isolated but visible frustrations related to the shopping experience.

- **Deals remain the cultural engine**

Despite the noise, discounts and promotions continue to fuel attention. The search for opportunity sustains engagement, reinforcing that the debate remains guided more by logic and comparison than by emotion.

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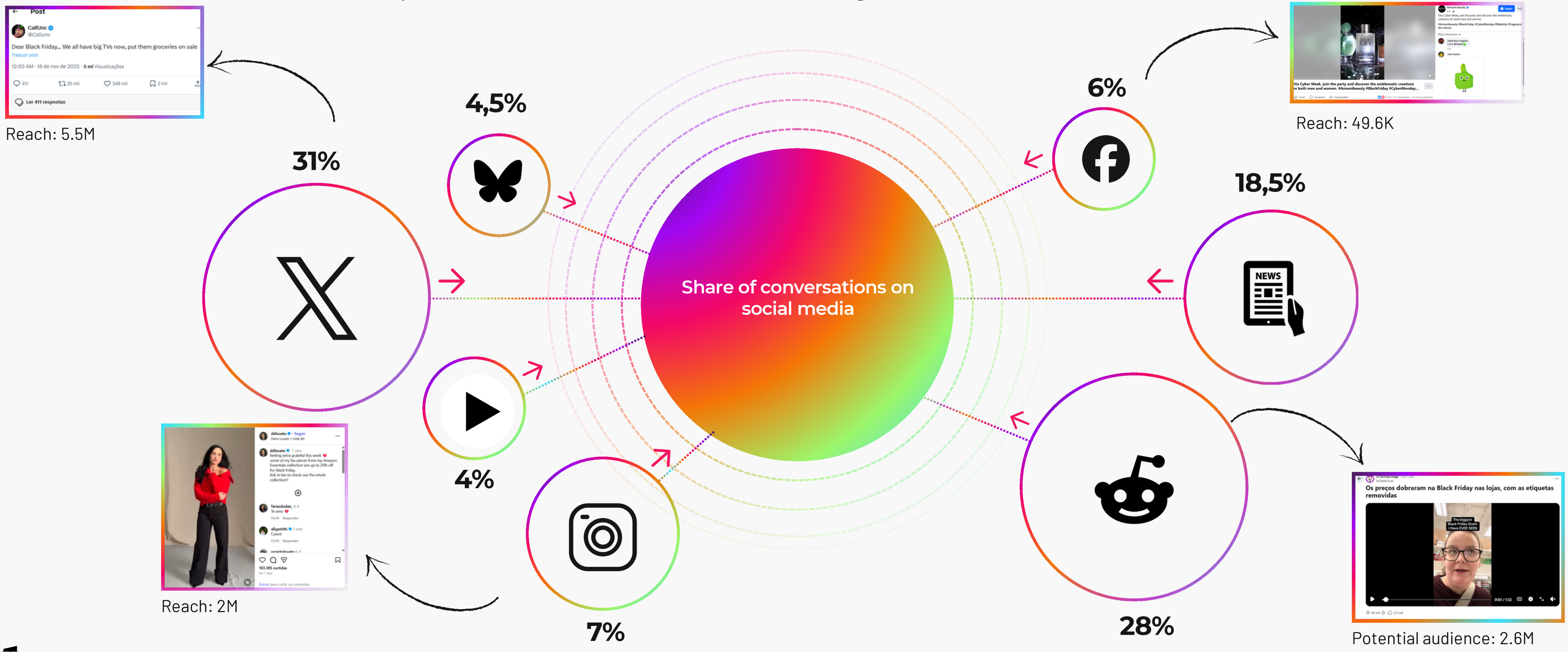
Different platforms, different dynamics

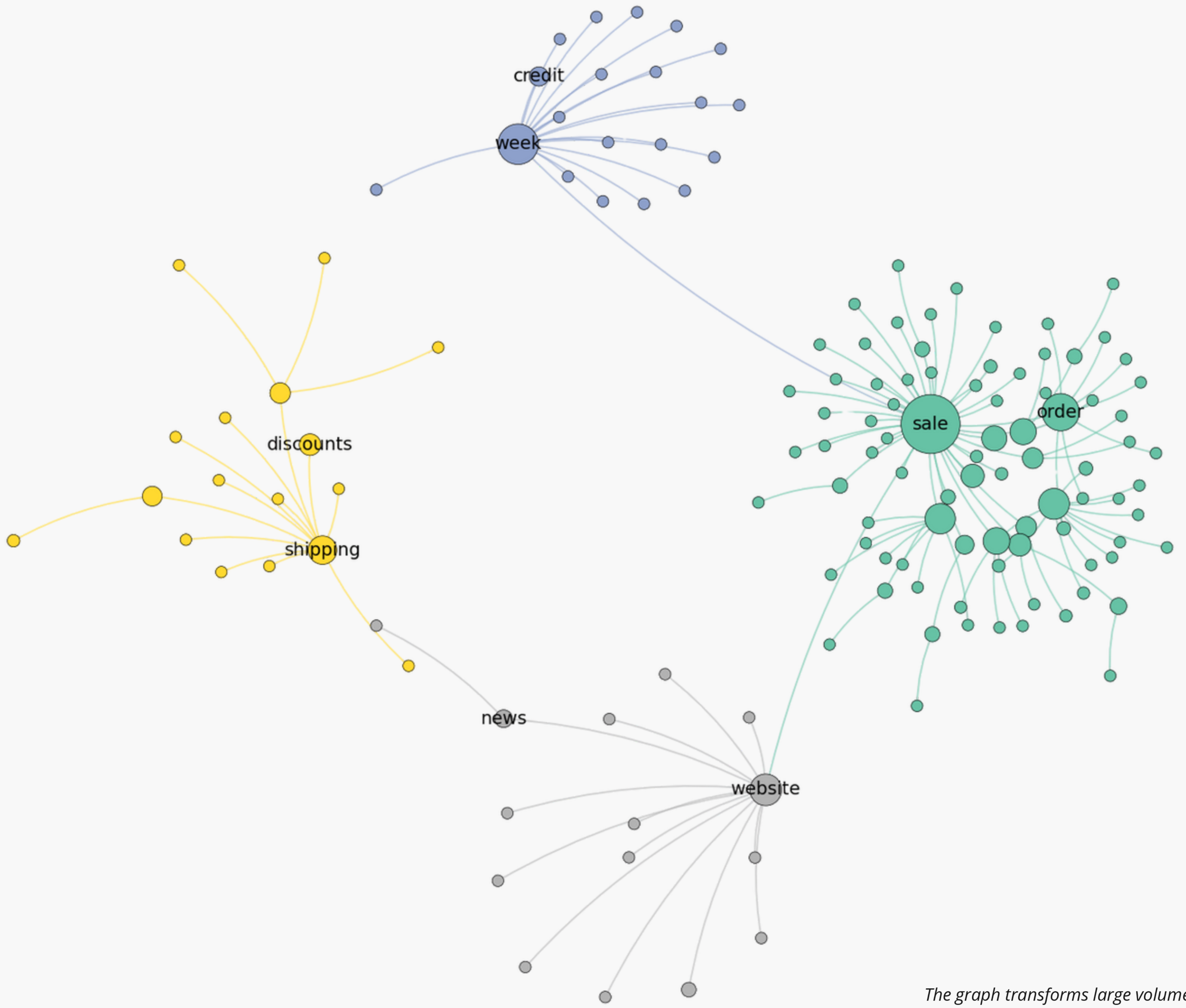
Shifts in platform behavior reveal how audiences navigate information, influence, and deals



Share of conversations on social media: X: 30,97%, Reddit: 28,00%, Online News: 18,51%, Instagram Public: 6,79%, Facebook Public: 5,81%, Bluesky: 4,59%, YouTube: 4,07%, Forums: 1,27%.

Graph What people talk about when they shop

A look at how different behavioral clusters highlight trends and pathways for new business opportunities



Brings together narratives about offers, order completion and delivery updates, showing users comparing deals and tracking returns during periods of high promotional activity.

Groups conversations about credit processes and follow-ups that “take longer than expected.” It reflects a niche of functional interactions between users and support channels, with attempts, responses and status checks throughout the week.

Focused on promotions, coupons and shopping prep for special dates. The mentions point to searches for advantages, fast shipping and participation in giveaways, with a strong sense of purchase planning.

A niche linked to informational platforms and browsing routines. The presence of terms related to websites, articles and login reveals a cluster centered on content consumption and sign-ups across media portals.

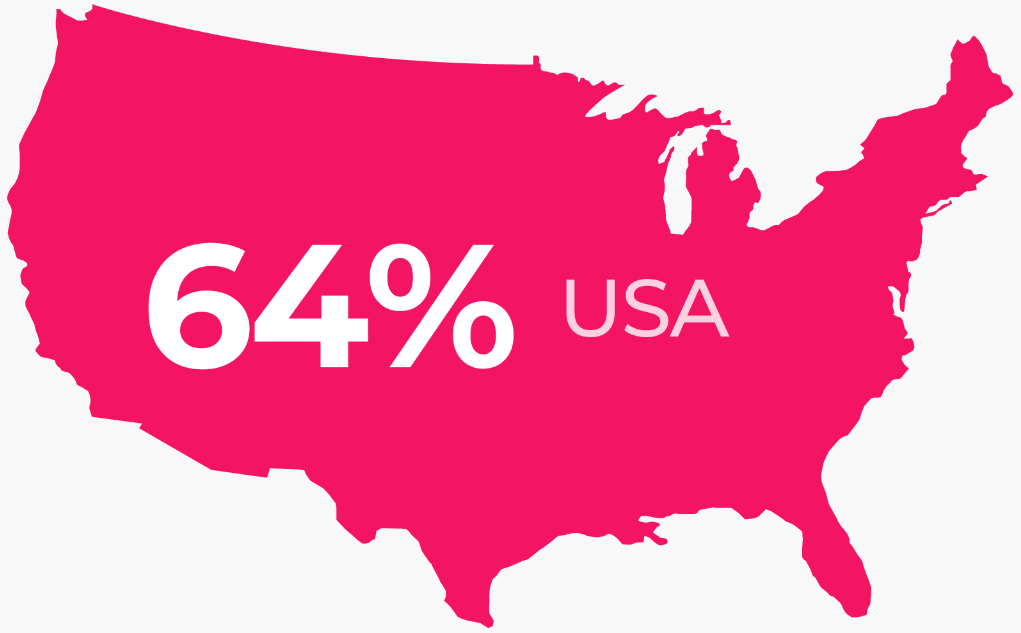
The graph transforms large volumes of data into a visual network that shows how the points are connected. Each point represents a relevant term or topic, and the lines indicate their relationships. Its purpose is to reveal how groups connect with each other — and highlight the central elements.

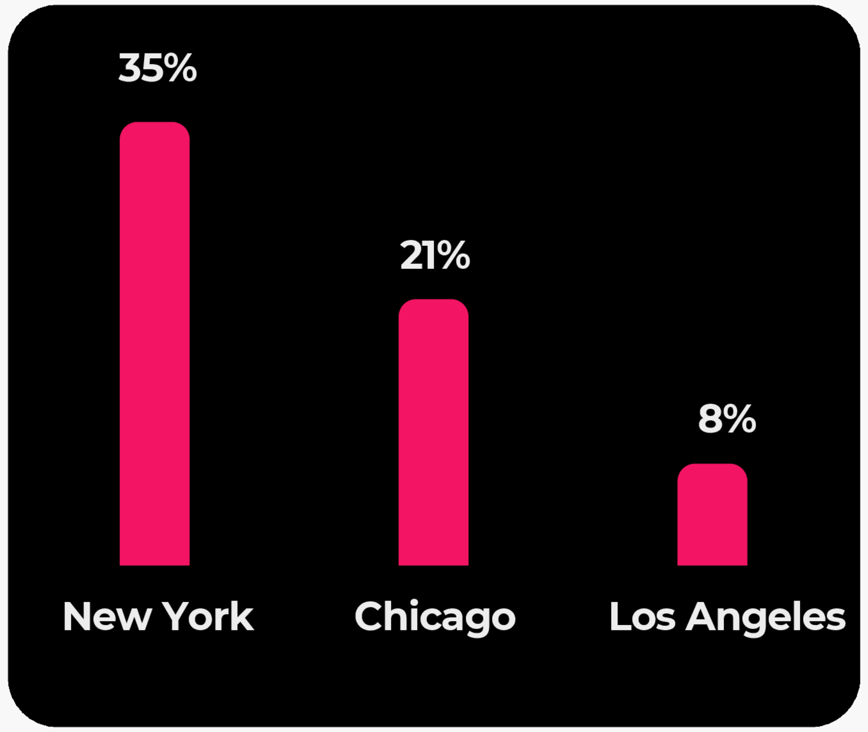
Black Friday is *Global*

With **64%** of the volume concentrated in the United States, the event remains deeply rooted in the American consumer. Cities such as **New York (35%)**, **Chicago (21%)**, and **Los Angeles (8%)** lead the conversation.

The search patterns reveal a clear logic:

- **29%** focused on **electronic products**, a category that continues to represent desire, upgrades, and technological status.
- **54%** tied to **online-first shopping**, signaling a definitive shift toward digital journeys and a growing expectation for convenience.
- **50%** originating from **Millennials (Gen Y)**, a generation that combines financial maturity with highly digitalized consumption habits.





What stands out in the searches

- **29%** Electronic products
- **54%** Online-first shopping
- **50%** Gen Y (Millennials)

Did You *Know?*

Although Black Friday originated in the United States — and the country continues to post some of the highest sales volumes in the world, including more than **$11.8 billion** spent online on the day alone in 2025 — there is no definitive global ranking that proves which country "consumes" the event the most. That's because the answer depends on the metric: while the U.S. leads in total revenue, markets like **Brazil and the United Kingdom** rank among the most active in searches and online engagement around Black Friday.

The demographic analysis, derived from Brandwatch's data engine, uses machine learning and rule-based modeling to classify Twitter authors discussing the brand across key demographic categories, such as account type (individual or organization), gender, interests, occupation, and location, inferred from public information available in user bios. Building on these demographic insights, we generate a persona with the assistance of Artificial Intelligence

Meet the Black Friday shopper profile

Jordan Mitchell

Gender: Male
Location: New York, NY, United States
Occupation: Business Executive (Mid-to-Senior Level)
Education: Master's Degree in Business Administration (MBA), NYU Stern School of Business

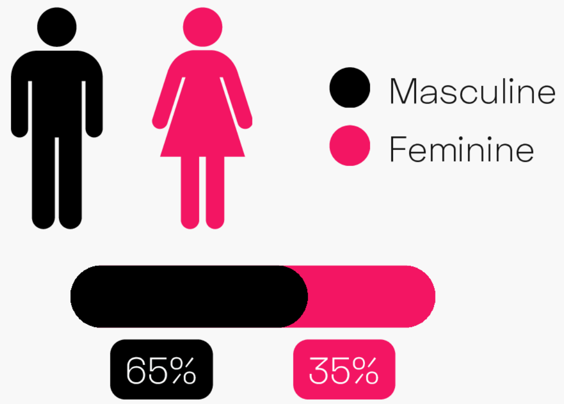
Professional profile | Jordan is a business executive based in New York City, with an MBA from NYU. He leads growth and innovation strategies at a tech company, always focused on solutions that combine efficiency, scalability, and market impact.

Connection with Black Friday | Jordan sees Black Friday as a smart investment opportunity. He looks for high-end products—gadgets, work tools, and premium items—that enhance his lifestyle and bring practical value to both his work and family life.

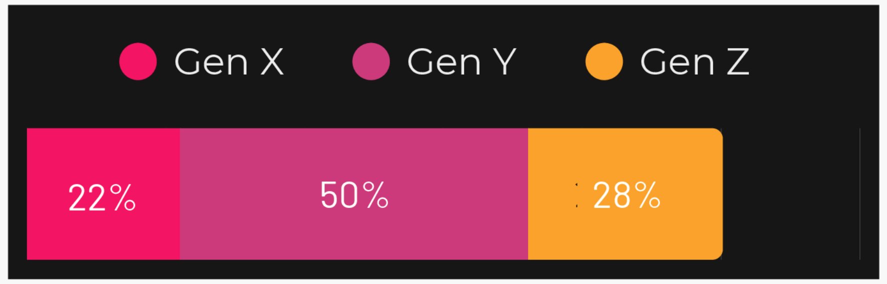
Digital habits | He's highly active on Reddit and X, where he follows news and market trends. He prefers concise, data-driven content with expert opinions. He uses Instagram to track brands he likes and often shares great finds with friends and colleagues.

What he values | Jordan values brands that deliver true innovation, clear communication, and streamlined experiences. He looks for trust, functionality, and a blend of style and performance—especially when endorsed by credible sources.

Gender

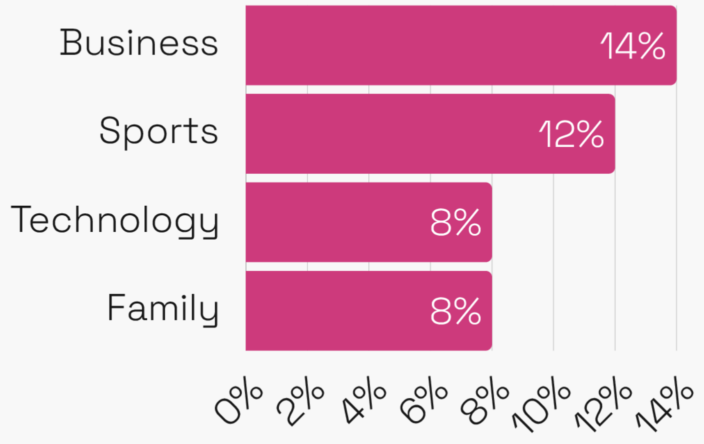


Generation



Generation X: Born between 1965 and 1980.
Generation Y (Millennials): Born between 1981 and 1996.
Generation Z: Born between 1997 and 2012.

Interests



CYBER MONDAY

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Real Results Cyber Monday

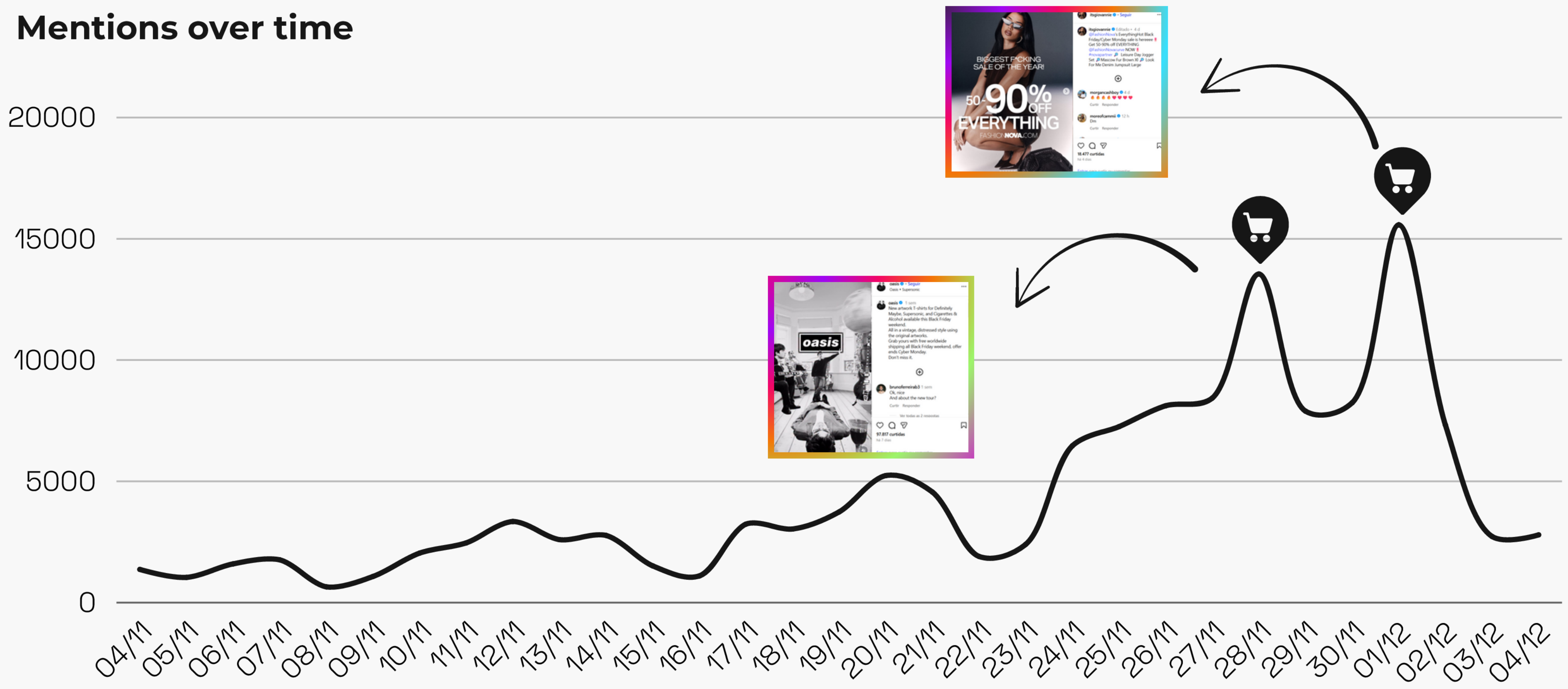
135.8K
MENTIONS
+764%*

40.1K
UNIQUE AUTHORS
+621%*

259M
REACH
+736%*

*PREVIOUS PERIOD: OCTOBER 3 TO NOVEMBER 3

Mentions over time



Cyber Monday's impact reached an unusual level of intensity in 2025, driving **135.8K mentions (+764%)**, **40.1K unique authors (+621%)**, and a potential reach of nearly **259 million (+736%)**. The surge wasn't fueled by discounts alone — highly shareable content, such as influencers promoting "90% off everything" and humorous critiques of the shopping frenzy, helped spark spontaneous conversations around desire, frustration, and consumer behavior.

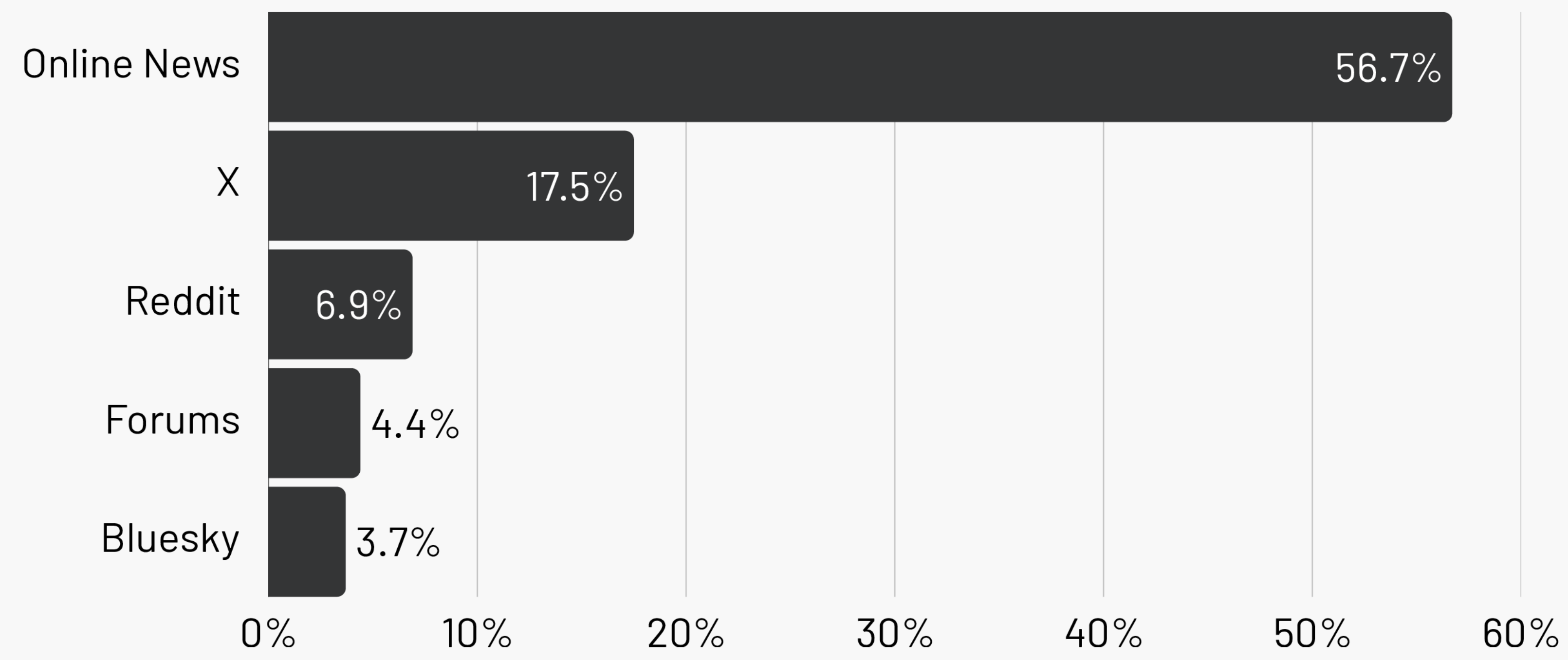
The graph shows two clear peaks: the first anchored by the viral spread of content dramatizing the "chaos" of Black Friday and building anticipation for Cyber Monday; the second driven by creators who turned the event into a cultural narrative — **whether showcasing opportunistic shopping or questioning the authenticity of the discounts**.

Cyber Monday is redefining where influence truly happens

Cyber Monday's impact was driven primarily by **online news (56.7%)**, which shaped the event's narrative through analyses, comparisons, and deal roundups, while social platforms like **X and Reddit** amplified real consumer perceptions and tensions around pricing and shopping experiences. The highest-reach posts reveal a more rational audience, evaluating value, credibility, and convenience before making decisions.

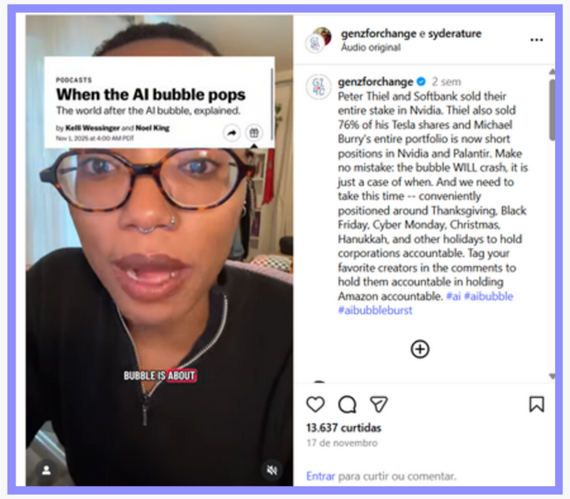
- **The date solidifies itself as a cultural barometer**, where media, creators, and consumers directly influence brand trust and competitiveness.

Share by platform

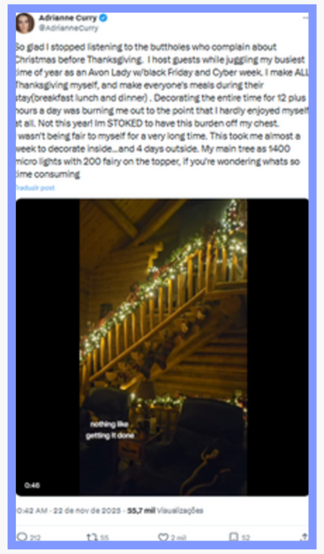


Main topics in Black Friday conversations

Reach: 525K

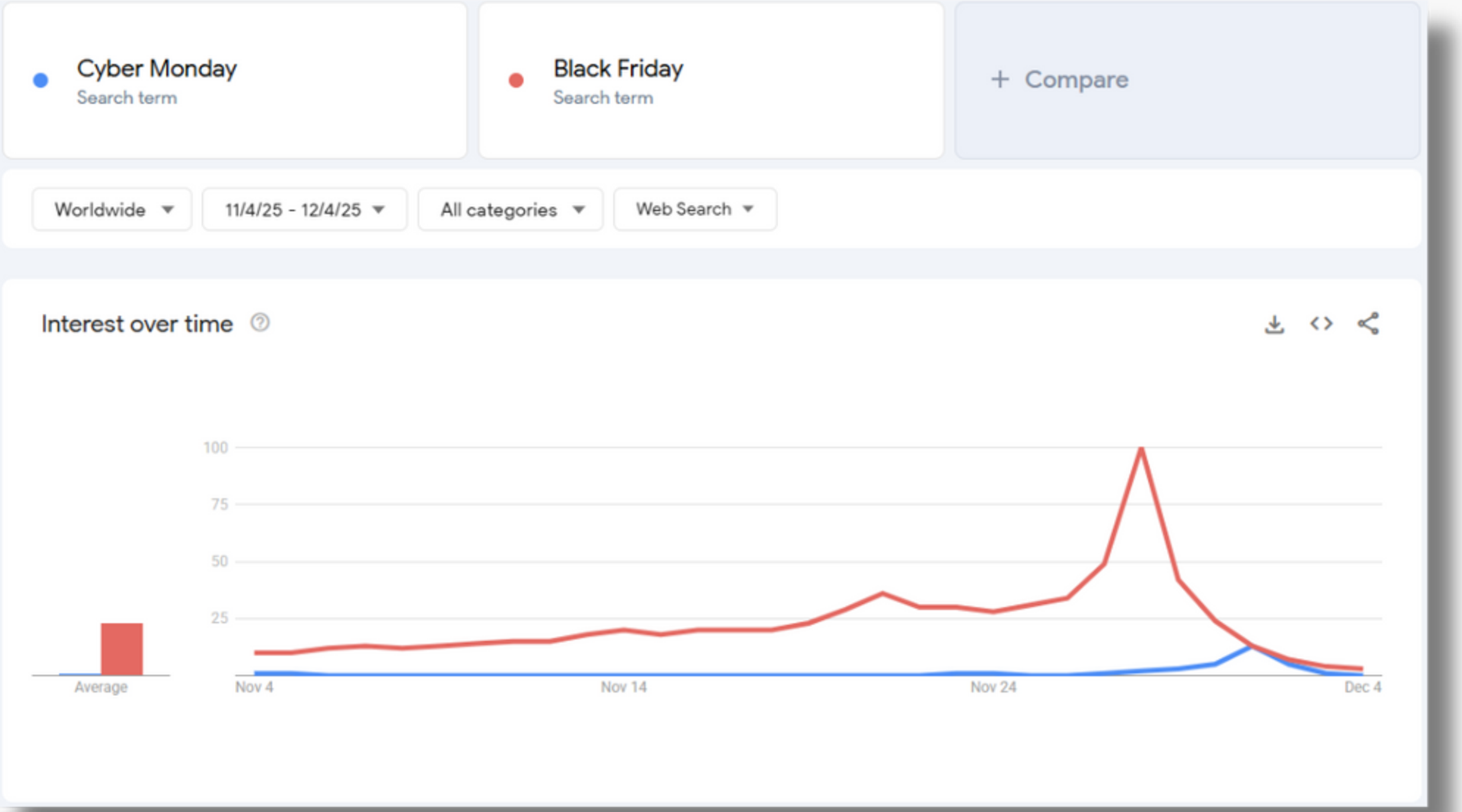


Reach: 275K

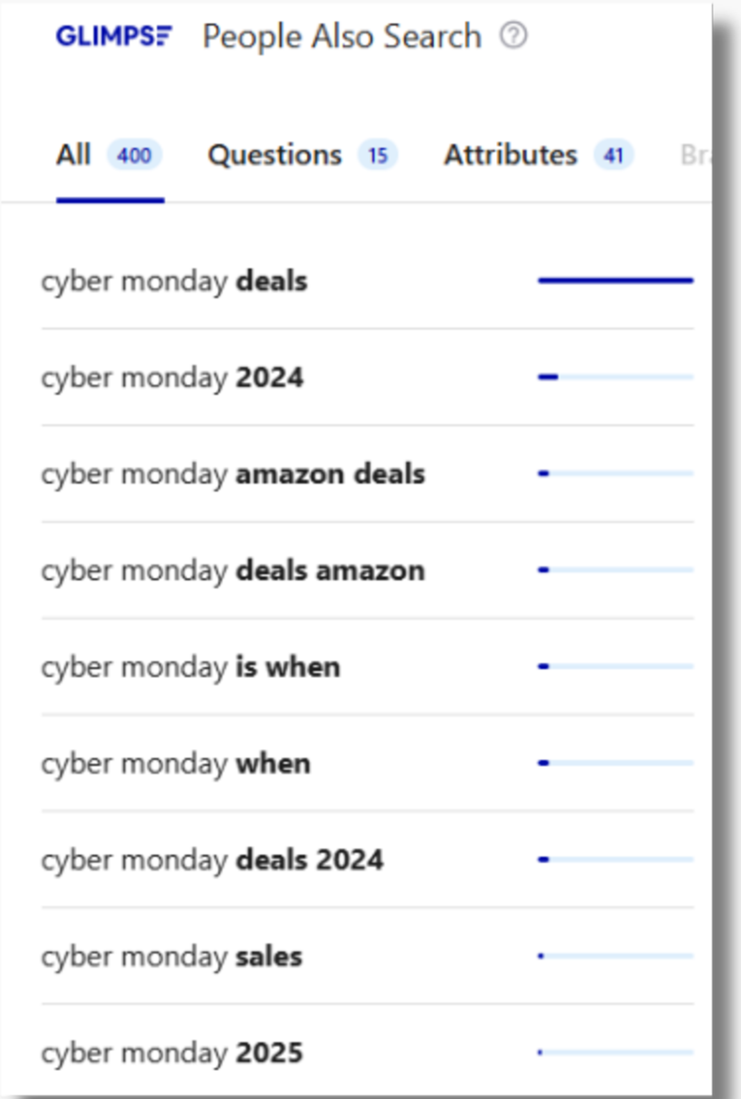


Reach: 334K

Google Trends - *Glimpse*



While Black Friday concentrates the highest volume of interest, Cyber Monday emerges as a more stable, conversion-driven search pattern. Related queries reveal a pragmatic user who arrives at the event with a clear purchase intention and a focus on specific offers — particularly from major retailers — reinforcing the date's role as the final decision engine within the promotional cycle.



- **Explicit purchase intent:** Terms like "cyber monday deals" and "amazon deals" lead the list, indicating an audience that prioritizes tangible value and objective price comparisons.
- **Planning as a decisive factor:** Queries such as "cyber monday when" highlight the importance of predictability in capturing demand.
- **A distinct position in the funnel:** While Black Friday captures attention, Cyber Monday establishes itself as the conversion point — where intention and action converge.

Did You *Know?*

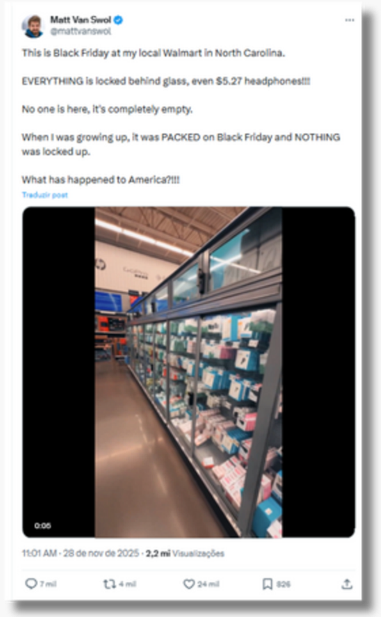
Cyber Monday was created in 2005 as a simple strategy to boost online shopping after the Thanksgiving holiday — and it quickly evolved into one of the largest digital retail events in the world. Today, it operates as the "final engine" of the promotional cycle: while Black Friday generates cultural buzz, Cyber Monday concentrates the most pragmatic searches — deals, sales, and retailer-specific promotions — attracting a consumer who arrives more prepared, compares prices, and makes purchase decisions with clarity and intent.

PRODUCTS, BRANDS AND SHOPPING EXPERIENCE

Tech still sets the pace: electronics and gaming dominate what consumers care about most

Electronics (33%) and games (19%) clearly lead Black Friday 2025 mentions, accounting for 52% of the total volume and reinforcing their role as the key demand drivers of the event. Home & Living (17%) and Fashion (12%) form a second relevant tier, indicating a more mature shopping journey that balances desire with practical needs.

1

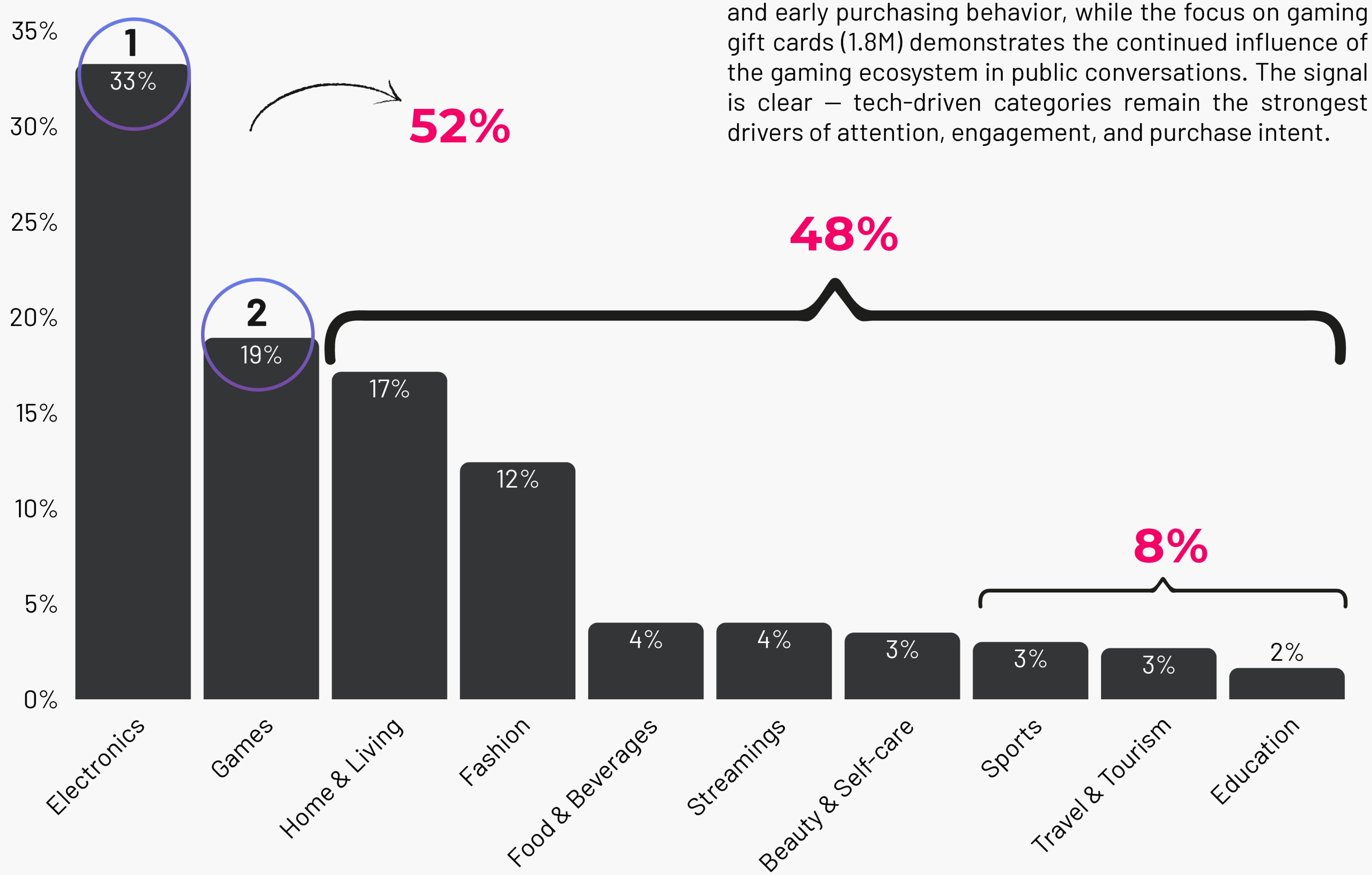


Reach: 11M

2

Reach:1.8M

Distribution of product mentions by category



The highest-reach posts reinforce this pattern: empty electronics shelves (11M reach) highlight stock pressure and early purchasing behavior, while the focus on gaming gift cards (1.8M) demonstrates the continued influence of the gaming ecosystem in public conversations. The signal is clear — tech-driven categories remain the strongest drivers of attention, engagement, and purchase intent.

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**The charts present the top ten brands by volume.*

How technology and home living are redefining *purchase intent*

A more value-driven, tech-savvy consumer is turning electronics, gaming, and Home & Living into the new centers of gravity for decision-making

What stands out in the searches

- **33%** Electronic products
- **19%** Games
- **17%** Home & Living

Black Friday 2025 search data reveals a consumer increasingly oriented toward **technology** and **efficiency**, with **electronics (33%)**, **games (19%)**, and **Home & Living (17%)** consolidating themselves as the primary drivers of purchase intent. This trend shows that demand is fueled not only by desire but also by device **replacement**, **functional upgrades**, and **at-home convenience** — three pillars shaping today's consumer journey. The dominance of these segments points to a competitive environment in which brands must operate within increasingly shorter cycles of **innovation and narrative**.

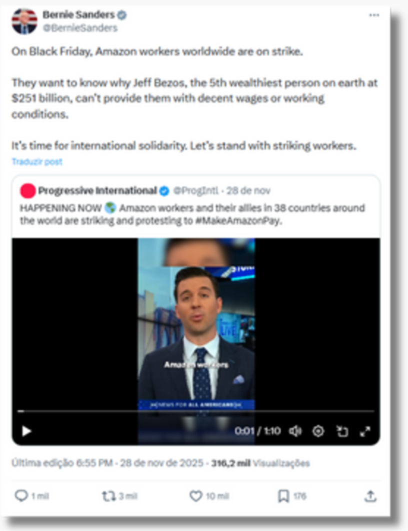
Electronics and games account for **52% of total searches**, reinforcing that Black Friday shoppers arrive **well-prepared**: they compare prices, read reviews, follow creators, and use the date as a **strategic decision point**. Home & Living and Fashion, which together represent **29%**, signal a more mature behavior — consumers balancing desire and necessity, converting only when there is a clear advantage.

- **The tech-upgrade cycle remains strong**, anchoring electronics and gaming as core demand drivers.
- **Purchase intent is clearer and more informed**, with users who already know what they want and use Black Friday to validate price, credibility, and timing.
- **Creators play a growing role in decision-making**, amplifying digital categories and shortening the distance between inspiration and conversion.

Convenience, reputation, and scale explain who leads *and why*

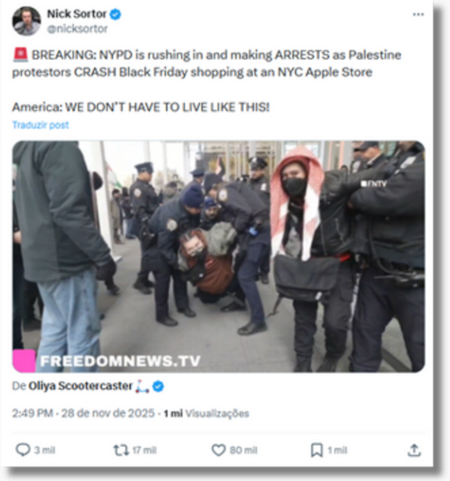
The highest-reach posts reinforce that public perceptions — especially store chaos and labor tensions — can quickly shape brand visibility during the event.

1



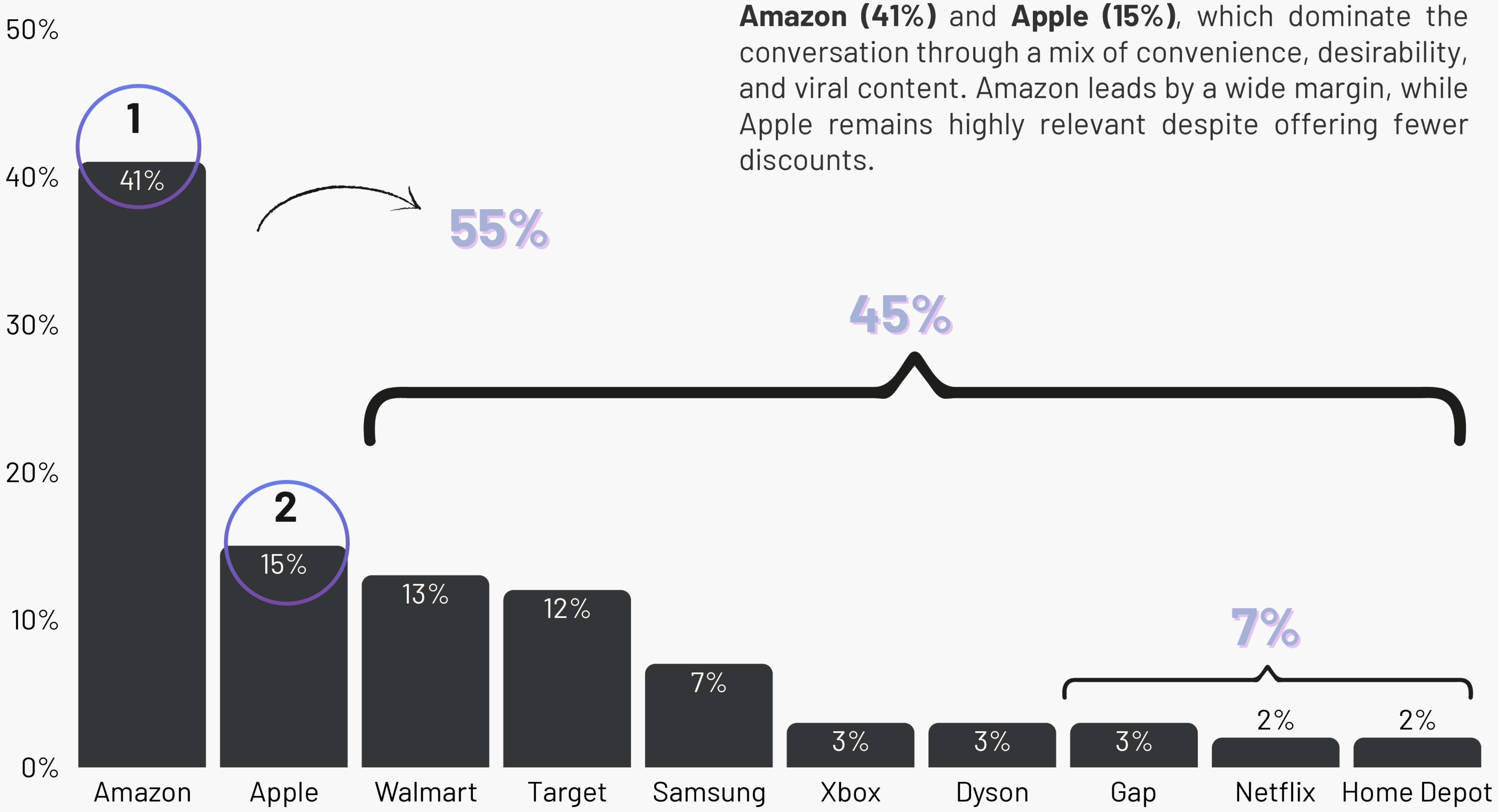
Reach: 2.2M

2



Reach: 8.4M

Distribution of product mentions by category



Black Friday 2025 shows a strong concentration around **Amazon (41%)** and **Apple (15%)**, which dominate the conversation through a mix of convenience, desirability, and viral content. Amazon leads by a wide margin, while Apple remains highly relevant despite offering fewer discounts.

The charts present the top ten products by volume.

How Consumer logic shifts toward scale and reliability

Search patterns reveal a value-driven shopper who rewards brands capable of unifying convenience, trust, and upgrade potential

While Amazon dominates through convenience and breadth of assortment, Apple sustains its relevance through aspirational appeal and upgrade cycles, and Walmart positions itself as a reference for price and accessibility.

The competitive dynamics point to a more rational audience that uses Black Friday as a validation moment: compare, confirm the advantage, and decide. The mentions reinforce that perceived value goes beyond discounts — it includes logistical reliability, price clarity, and brand reputation. This logic favors players with strong digital infrastructure and integrated communication.

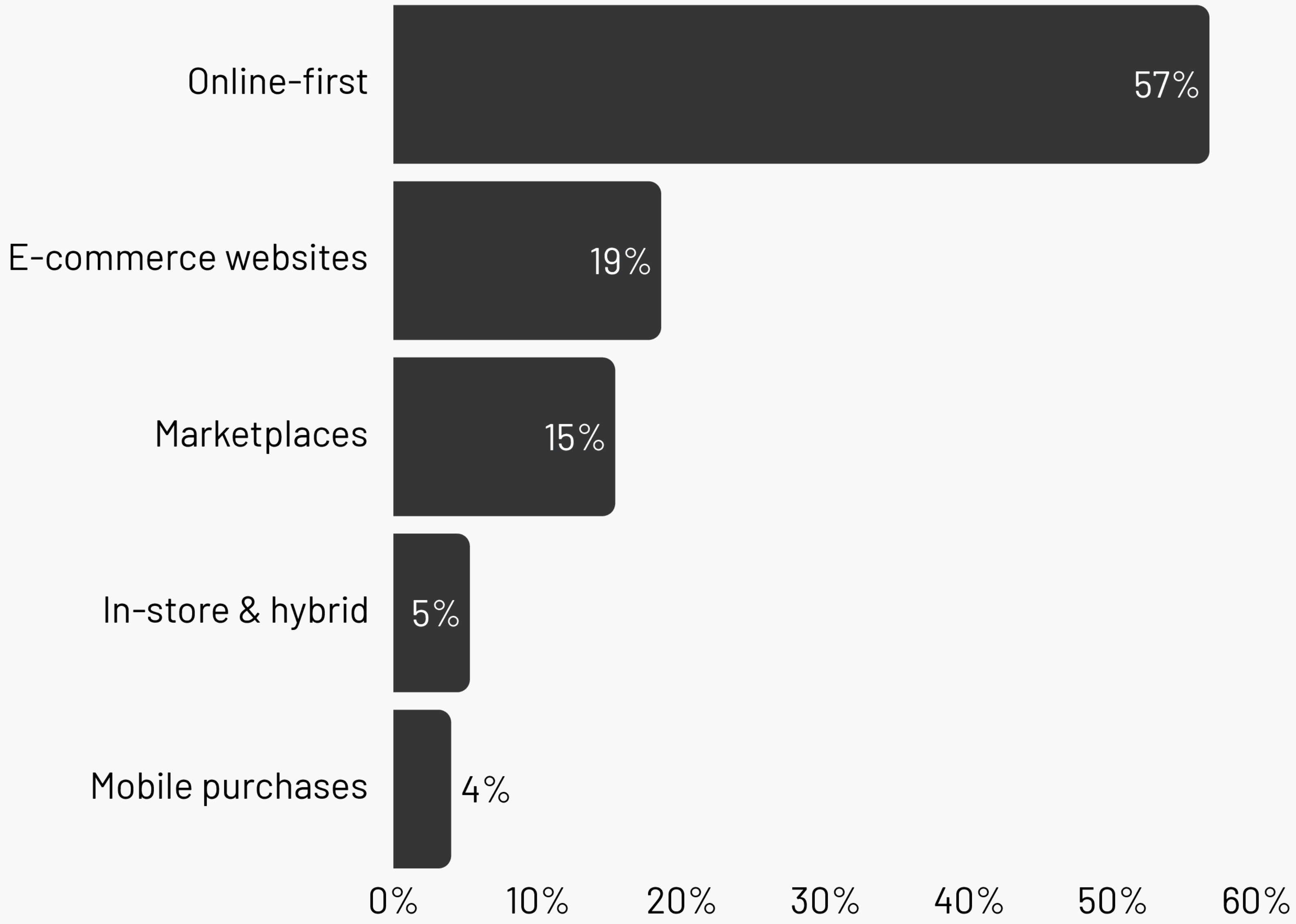
- **Ecosystem brands concentrate intent**, reducing dispersion and accelerating conversions.
- **Trust and logistics weigh as heavily as price**, directly influencing search share.
- **Upgrade cycles continue to fuel Apple**, even with lower promotional aggressiveness.
- **Walmart expands as a hybrid alternative**, balancing digital convenience with physical presence.

What stands out in the searches

- 33% Amazon
- 19% Apple
- 17% Walmart

The physical checkout loses relevance in a market driven by *choice and speed*

Distribution of conversations by purchase method



E-commerce websites

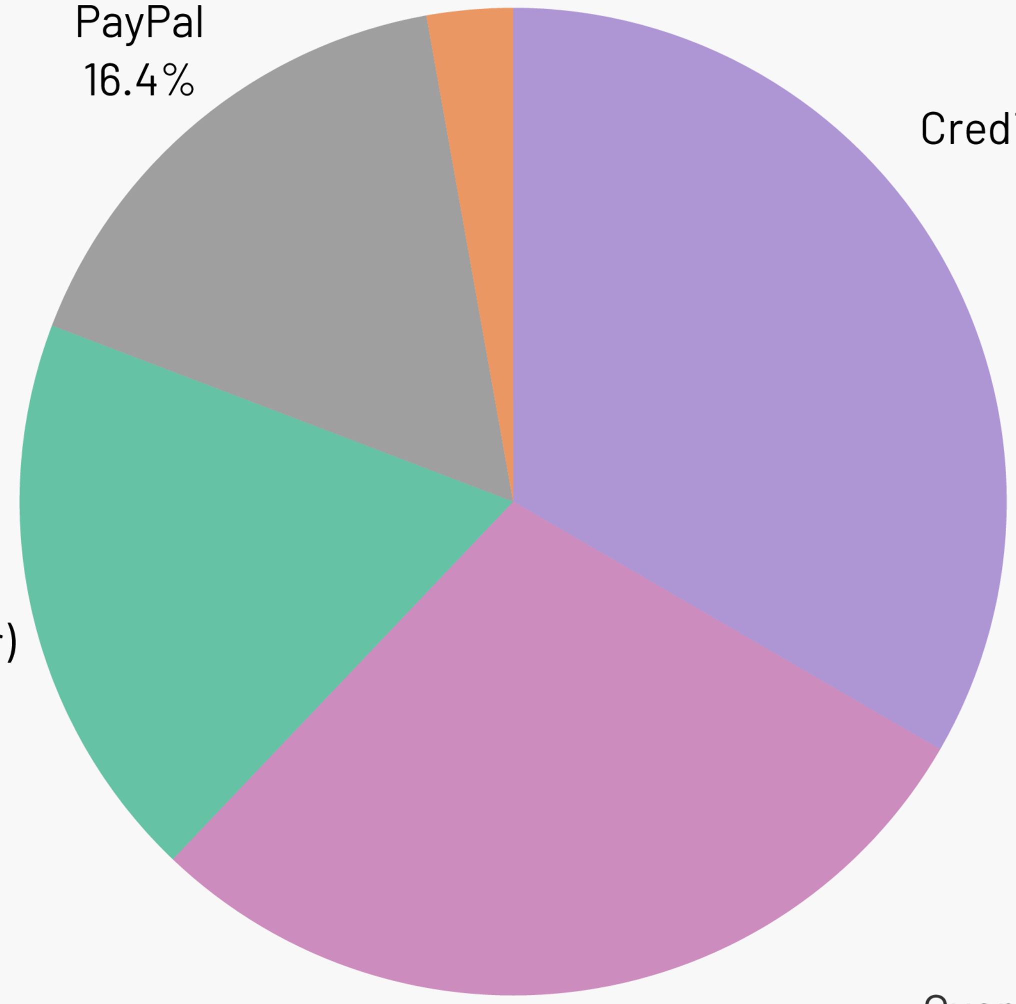
57%

The distribution of purchase methods reveals a consumer who is increasingly digital and efficiency-oriented. **Online-first (57%)** dominates overwhelmingly, showing that Black Friday 2025 shoppers begin and end their journeys primarily in digital environments — where comparison, convenience, and speed translate directly into competitive advantage. **E-commerce websites (19%)** and **marketplaces (15%)** reinforce this shift, establishing themselves as hubs for product discovery, evaluation, and purchase, especially in categories with intense price competition.

The low share of **in-store & hybrid (5%)** and **mobile purchases (4%)** indicates that physical stores now play a more limited role, focused on specific needs such as checking availability, making exchanges, or seeking in-person experiences. Mobile, while central to browsing, still does not capture the same volume of conversions.

Payments as strategy — where consumers balance convenience and control

Distribution of conversations by payment method



Credit & Debit Cards

33%

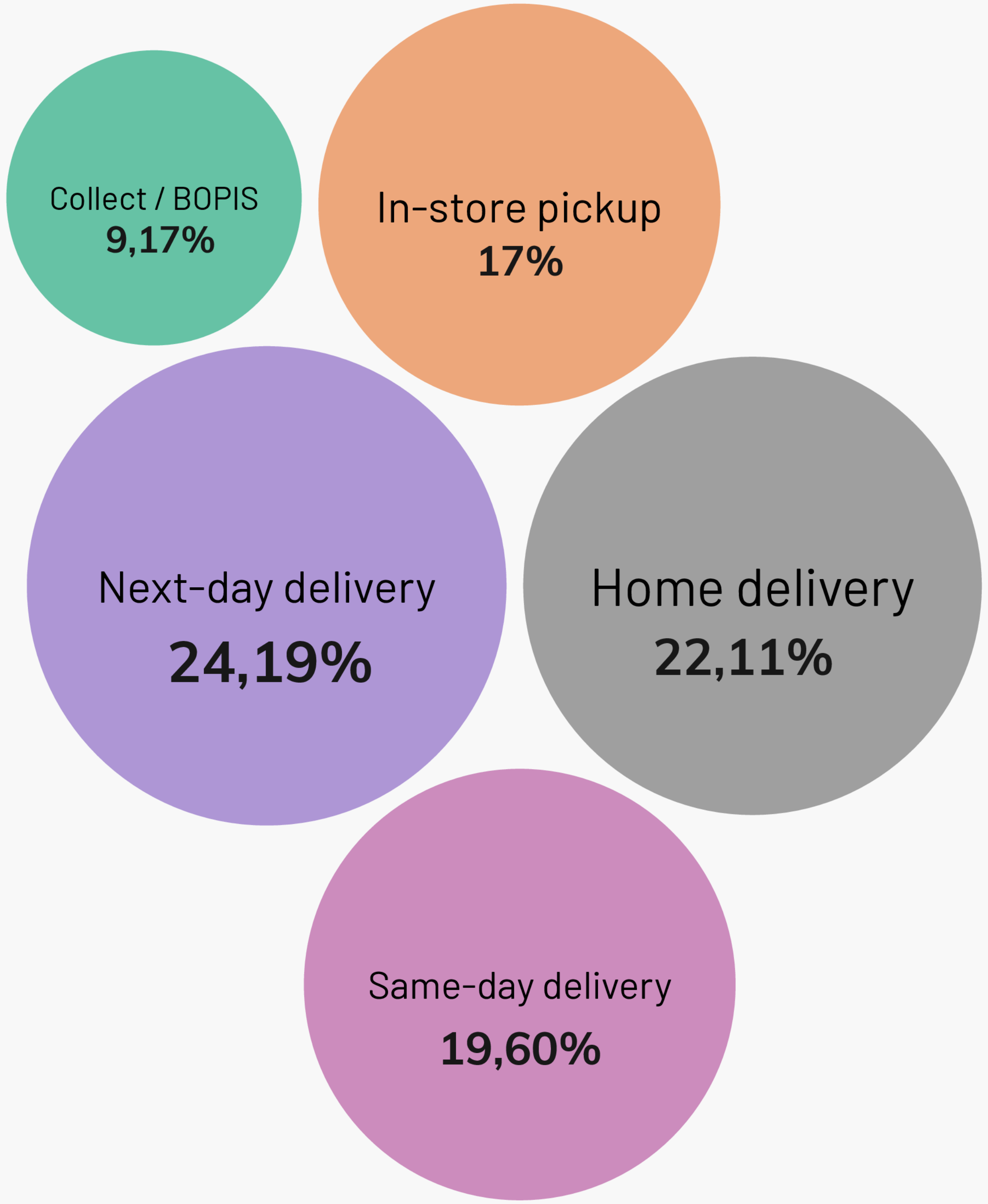
Credit and debit cards (33.4%) remain the dominant payment method — a reflection of familiarity, universal acceptance, and the ability to consolidate benefits such as cashback and purchase protection. **Gift cards (28.7%)** follow closely behind, driven by promotional bonuses, gifting convenience, and their strategic use to control spending during high-demand shopping events.

The rise of **BNPL (18.7%)** confirms the expansion of models that reduce financial risk and increase purchasing power, especially relevant for electronics and higher-ticket categories. **PayPal (16.4%)** continues to stand out as a symbol of digital convenience, while **digital wallets (2.8%)** still represent a smaller share of the conversation, suggesting adoption remains fragmented and concentrated in specific niches.

Overall, payment behavior during Black Friday 2025 reflects a **balance between traditional practicality** (cards), **financial-optimization strategies** (gift cards and BNPL), and **digital convenience solutions** (PayPal and wallets).

The modern shopping journey reveals the growing weight of control and convenience

Distribution of conversations by pickup type



Next-day delivery

24%

The landscape reveals a consumer who prioritizes efficiency, predictability, and control over the shopping experience. **Next-day delivery (24.19%)** and **home delivery (22.11%)** lead the conversation, indicating that speed and convenience remain core pillars of post-purchase expectations — especially during high-demand periods like Black Friday. These models operate as direct extensions of retail's value proposition: receiving products quickly and without friction.

Same-day delivery (19.60%) emerges as a growing competitive differentiator, driven by the desire for immediate gratification and reduced uncertainty. Meanwhile, **in-store pickup (17%)** and **click & collect (9.17%)** remain relevant among consumers who want to avoid delivery costs, secure product availability, or maintain control over the pickup timing.

2024 X 2025

LOXIAS®

Distributed growth reshapes Black Friday dynamics

Big numbers 2024

MENTIONS

1.8M **+5.56%***

Total mentions 2025: 372K

UNIQUE AUTHORS

575.2K **+28.61%**

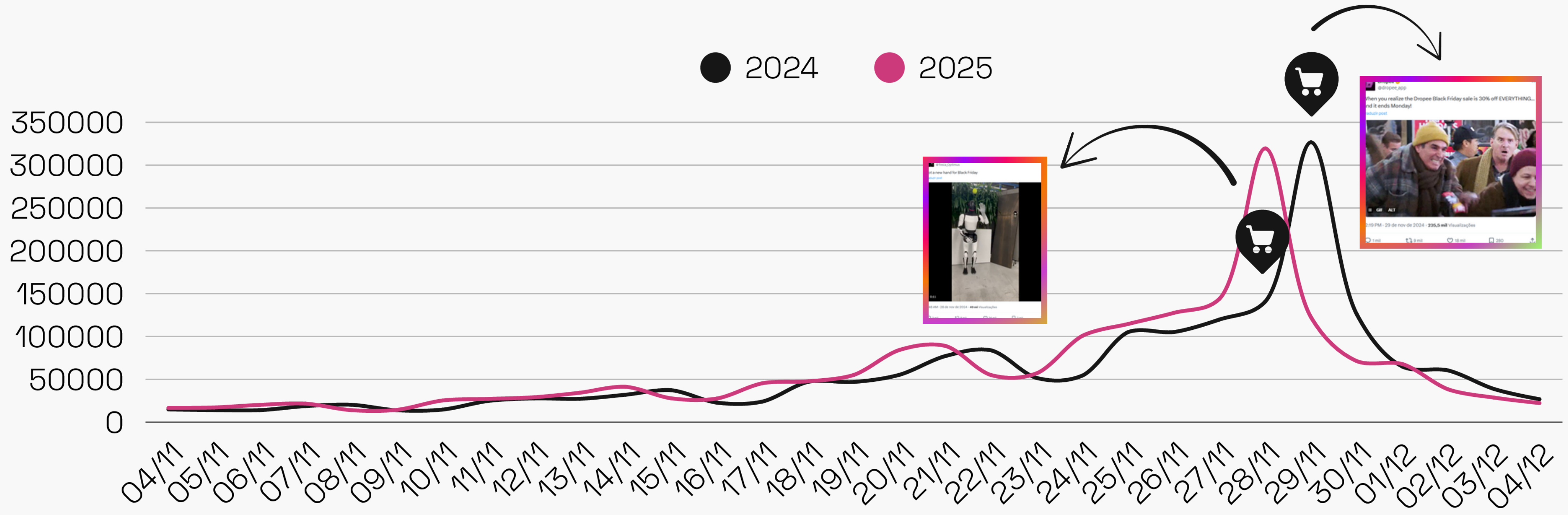
Total mentions 2025: 372K

REACH

4.9B **+28.57%***

Total mentions 2025: 372K

Mentions over time



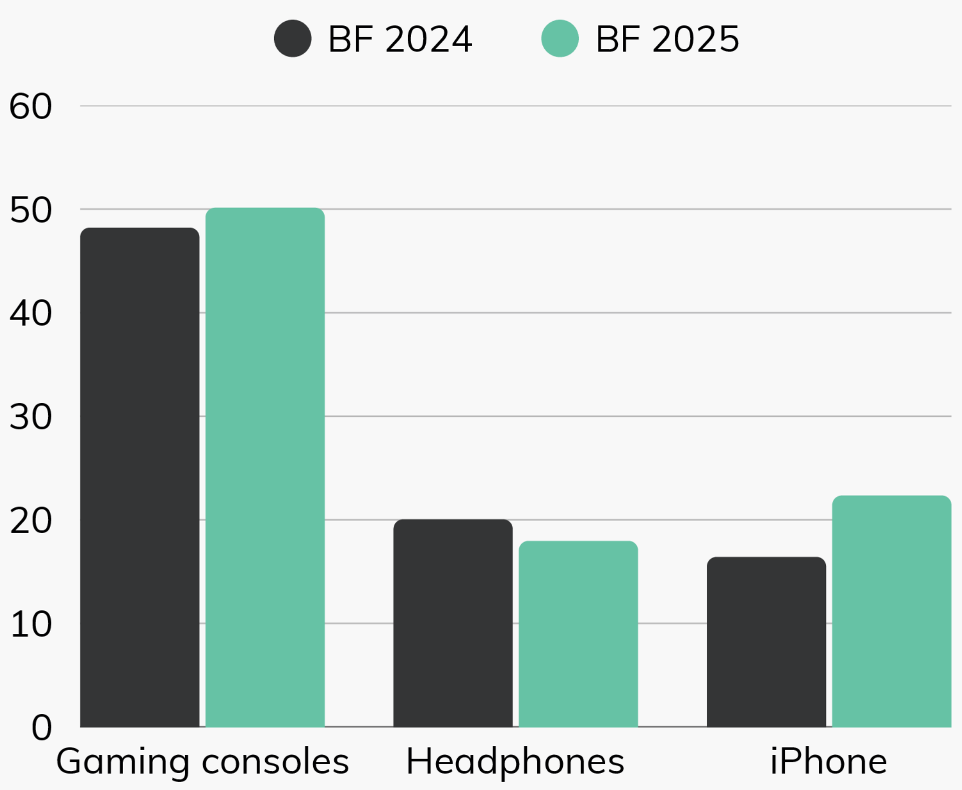
From 2024 to 2025, mentions grew by **+5.56%**, unique authors increased by **+28.61%**, and total reach rose by **+28.57%**, showing that the conversation not only expanded but also became more distributed across different groups and more amplified through social networks.

The direct comparison reveals a more competitive market in 2025, where brands that create narrative impact and maintain consistent presence capture a larger share of attention and consumer preference.

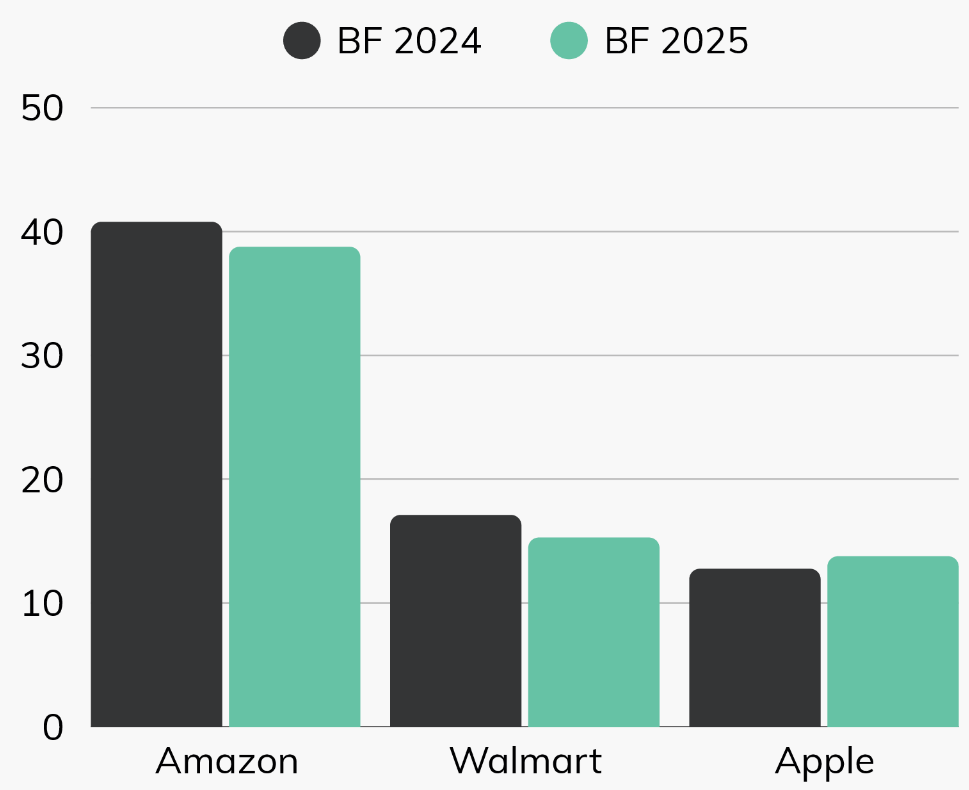
- **More intense peaks in 2025** suggest faster decision-making and greater sensitivity to viral content.
- **The higher overall volume** reinforces a more competitive Black Friday, with users who are more active and more demanding throughout the search and validation journey.

The strength of 2025 reveals a market accelerated by ***upgrades***

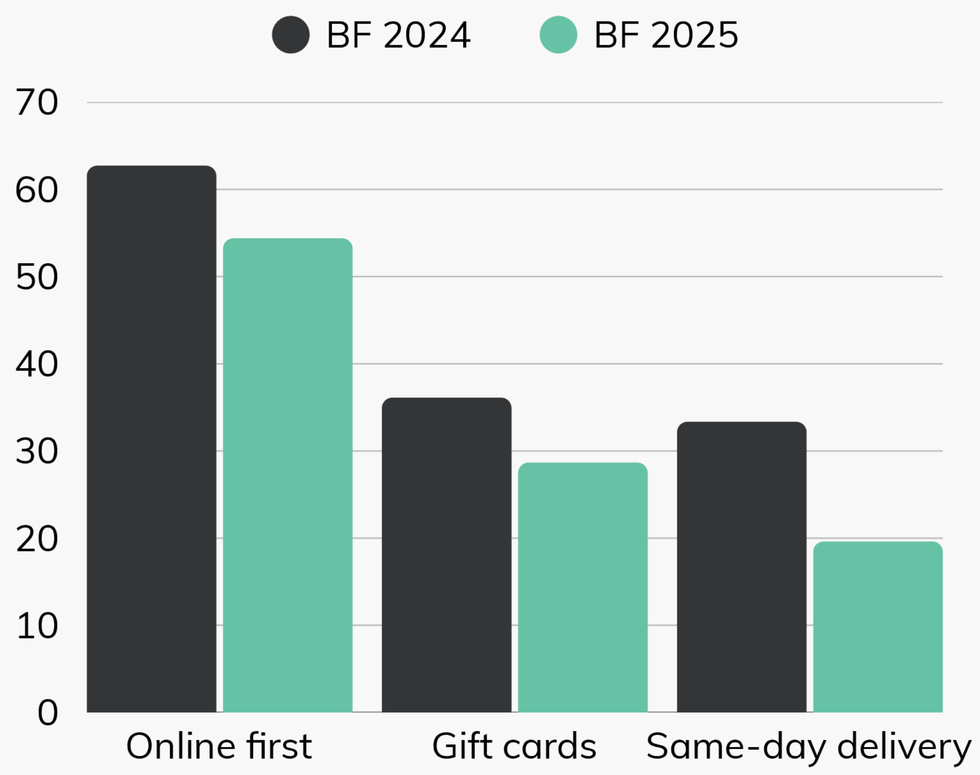
Top 3 products by mentions



Top 3 brands by mention



Shopping experience



The figures shown in the chart indicate percentage values.

- Gaming consoles remain leaders and grow in 2025, signaling more frequent upgrade cycles and high competitiveness in the category. Headphones decline, **while the iPhone rises**, reinforcing the strength of premium ecosystems. Amazon stays dominant, though with a slight decrease, indicating a more distributed market; Walmart and Apple remain stable, showing that competition is driven less by individual players and more by perceived value, pricing, and narrative strength.

- Digital channels remain central, but **online-first loses intensity**, reflecting consumers who are increasingly selective and demanding in their journey. Gift cards drop in relevance, while **same-day delivery** grows, highlighting the search for immediacy and more efficient logistics. The comparison between 2024 and 2025 shows a more pragmatic user, focused on availability, reliability, and effort reduction — decisive factors for conversion in high-competition periods.

Top phrases

CONCLUSION

Black Friday 2025: A shift toward trust-driven and efficiency-led consumption

The consolidated view of the data shows that 2025 not only increased volumes but **reshaped the logic of consumer behavior**. With more unique authors (+28.61%), higher reach (+28.57%), and sharper peaks, the conversation became broader, more distributed across groups, and increasingly influenced by fast cycles of social validation. The result is a more competitive landscape, where consistent presence and narrative clarity matter as much as price.

Behavioral signals confirm a structural transition: electronics, gaming, and Home & Living concentrate demand and reflect a consumer guided by upgrades, functionality, and convenience. Ecosystem brands strengthen their relevance — Amazon through scale, Apple through aspirational pull, and Walmart through price-accessibility balance — reinforcing a decision journey that is more rational and evidence-based.

Experience expectations also rise. Online-first remains dominant, while same-day and next-day delivery symbolize the desire for control and logistical efficiency. In payments, the blend of practicality (cards), financial autonomy (BNPL), and digital convenience (PayPal) reveals a journey that is less impulsive and more strategic.

In essence, **2025 marks the maturity of the cycle**: less about discounts and more about trust, fluidity, and coherence. Brands that integrate narrative, logistics, and purpose take the lead in decision-making — and define the next evolution of Black Friday.

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About us

Loxias.ai combines 10 years of experience in social media technology inherited from its mother Polis Consulting with leading AI driven Social Media monitoring and analytics platforms, a robust proprietary methodology and its experienced and highly motivated team of social media analysts and data scientists.

Our innovative solution combines state of art multi-channel monitoring tools with a robust proprietary methodology and qualified human expertise – everything is just a few clicks away through our e-commerce platform.

Democratizing enterprise data and insights with Intelligence Powered By AI

Loxias utilizes exclusive AI methodology and skilled data analysts to assist brands and companies in comprehending market trends and shifts in social media and public conversations, providing valuable business insights.

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In-deph analysis of a particular brand in the social media landscape

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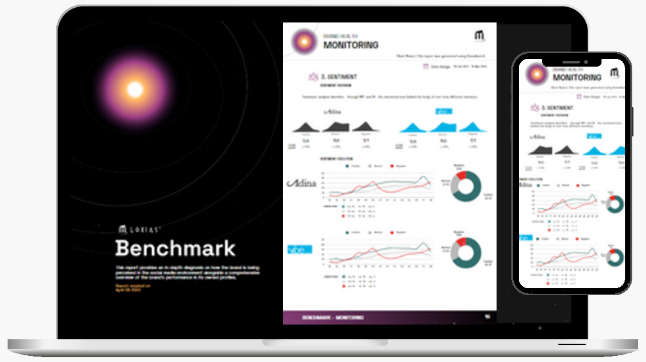

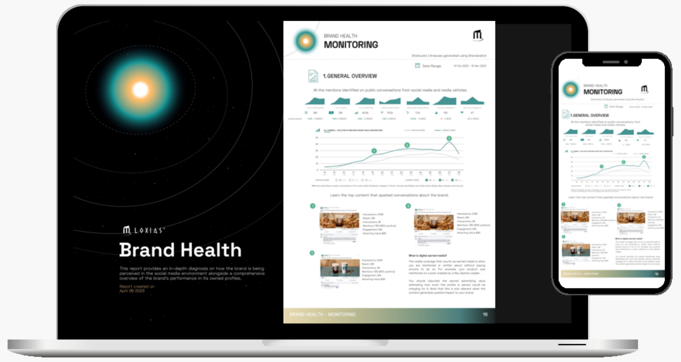

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