



♥ scalapay

2025

Black Friday & Holidays Spending Outlook

Shopping Trends and
Essential Strategies for
E-commerce Success



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Executive Summary

Black Friday is no longer a single-day shopping frenzy; it has become **Europe’s longest retail season**. By 2025, the event has matured into a multi-week “**shopping hill**,” where consumers research early, spend selectively, and convert only when price, trust, and timing align. For retailers and e-commerce leaders, **this shift demands new strategies that balance anticipation with execution**.

Despite lingering economic uncertainty, **consumer confidence is holding steady**. Seven in ten Europeans intend to maintain or grow their holiday budgets. Yet spending is more **deliberate**: shoppers compare across channels, extend purchase windows beyond Friday, and expect both value and reassurance. Trust is now as decisive as price. **While 73% of Italians** say they trust Black Friday deals, only **29% of French shoppers do**, which means the same promotion can succeed or fail depending on local sentiment.

Category dynamics are evolving. Black Friday baskets increasingly reflect lifestyles rather than just fashion or tech, signaling opportunity for retailers who broaden assortments. “**Little luxuries**” such as bag charms and premium coffee gear are thriving as consumers seek attainable indulgence. Meanwhile, advent calendars in beauty, wellness wearables, and experiential products are moving up the promotional calendar, with launches



starting as early as August. **Digital acceleration** is reshaping how campaigns are built. Generative AI is enabling brands to reduce creative cycles from weeks to days, fueling **personalization at scale**. Yet the winning formula remains human creativity amplified by machine efficiency. Brands that lean too heavily on automation risk losing authenticity.

Payment flexibility is emerging as a growth lever. In Italy, **42% of consumers** consider using installment options during Black Friday. For younger demographics, **Buy Now Pay Later** has become an expectation rather than an add-on, boosting basket sizes while securing merchant cash flow.

In this report, we explore the forces reshaping **peak season in 2025**, drawing on exclusive Scalapay data from **Italy, France, and Spain**. The analysis highlights how consumers are redefining their shopping behaviors, which categories are driving growth, and how retailers can convert trust into long-term loyalty. Scalapay’s data also provides a unique view on the role of Buy Now Pay Later in peak season, showing how flexible payments **are shaping conversion rates, basket sizes, and customer retention**.



Consumer Outlook

European shoppers are entering the holiday season with **more confidence than anticipated**. While economic concerns remain, the recent slowdown in inflation across the eurozone has helped many households preserve their holiday spending power. In key markets such as France, Italy, and Spain, **seven in ten consumers** plan to maintain or even increase their budgets compared to last year.⁽¹⁾

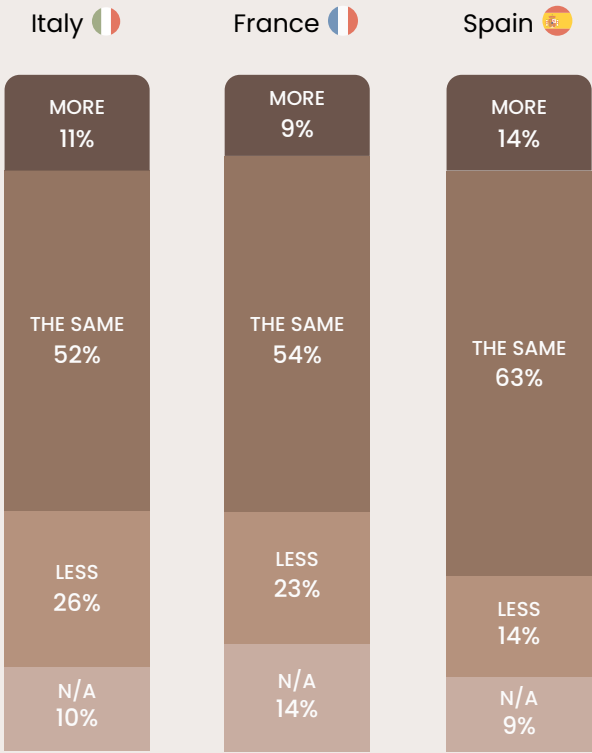
Black Friday as a season

In 2024, Black Friday confirmed its position as a major shopping event across Europe, with more than **80% of consumers planning purchases**, with Italy leading participation at 86% ⁽²⁾.

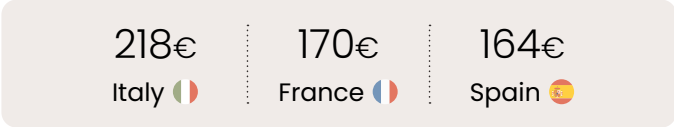
Digital participation is also increasing. In Western Europe, **46% of online shoppers** made at least one **Black Friday purchase in 2024**, and sales during the week reached nearly twice the level of an average week ⁽³⁾.



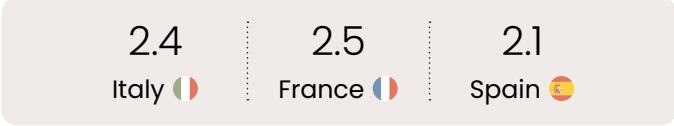
2025 Holiday spending Intent vs 2024⁽¹⁾
% of respondents



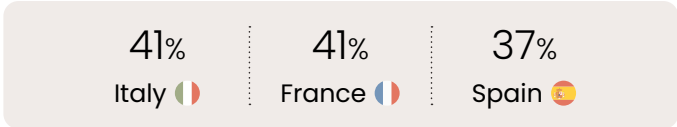
2024 Average Scalapay order value
Black Friday Weekend across markets⁽⁴⁾



2024 Average Scalapay number of items
per order during Black Friday⁽⁴⁾



Black Friday 2024 Participation Rate
among Digital Shoppers (average)⁽³⁾



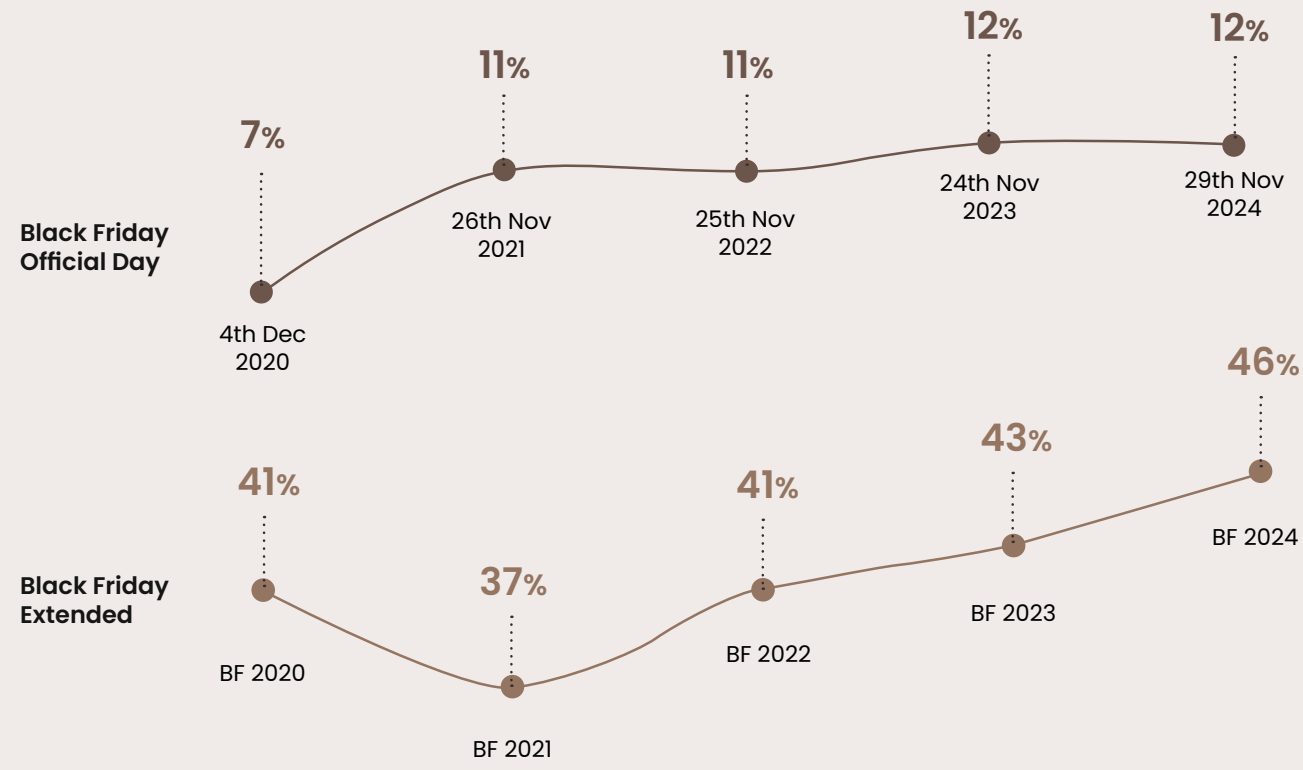
Throughout the years digital shoppers are more and more active on Black Friday:

46% of digital shoppers in West Europe made at least 1 Black Friday purchase online this year.

7 out of 10 consumers say they want to maintain or even increase their budget compared to last year.



Black Friday Participation Rate among
Digital Shoppers since 2020⁽³⁾



(1) AN UPDATE ON EUROPEAN CONSUMER SENTIMENT, SEPTEMBER 2025, MCKINSEY & COMPANY (2) BLACK FRIDAY IN EUROPE: A COUNTRY COMPARISON, PWC, 2024

(3) BLACK FRIDAY 2024 RESULTS: TRENDS AND INSIGHTS, NIELSEN IQ, 2024 (4) SCALAPAY DATA, 2025

Much of this growth came from **early promotions**, confirming that brands launching campaigns ahead of time consistently see stronger results. Black Friday has shifted from a single shopping day into a **full season**, with consumers spreading purchases across weeks instead of concentrating on **one peak moment**.

Shoppers remain committed to holiday spending but are more deliberate in how **they allocate budgets**. The “shopping hill” dynamic in Europe is set to continue: **consumers pace their spending**, waiting for the right mix of **price, trust, and timing** rather than rushing to buy on a single day⁽⁵⁾. **Over 60% begin searching for deals by early November**, with many starting evaluations in October, accelerating in early November, and converting only once confident in both the offer and the retailer. This makes it essential for brands to treat Black Friday as a season, building layered campaigns that reflect an extended decision-making process.

Brands are adapting too. Sneak peeks of holiday staples like advent calendars now appear as early as August, fuelling anticipation. A 2024 Think with Google⁽⁶⁾ study showed that companies investing in **early awareness and consideration** – through video, user-generated content, and full-funnel strategies – saw **significant lifts in November conversions**. The operational takeaway is clear: consistent, full-funnel activity drives more reliable growth than short bursts of last-click advertising. Companies that plan for a season **outperform those that plan for a day**.

Awareness levels reinforce this opportunity. Black Friday is now recognised by **95% of consumers in studied markets**, with about 70% intending to shop. Cyber Monday follows at 82% awareness and 64% participation, while Singles Day remains niche at just 27% awareness⁽⁷⁾. For brands, this means focusing resources where consumer attention is strongest, while ensuring campaigns are structured with a season-long mindset.

Over 60% begin searching for deals by early November, with many starting evaluations in October (...). This makes it essential for brands to treat **Black Friday as a season**, building layered campaigns that reflect an extended decision-making process.

What Shoppers Weigh Before They Buy

Price remains the **main purchase trigger**⁽³⁾, followed by product features and promotions, and **DHL reports that 33% of Europeans actually buy more during the sales**, often using the period to catch up on postponed purchases. Price is the main decision factor, for about three-quarters of shoppers, followed **by product features** (61%) and **promotions** (36%). Discounts must also feel credible: PwC data⁽²⁾ shows that, across Europe, a reduction of **around 58% is what shoppers** consider a “good deal.”

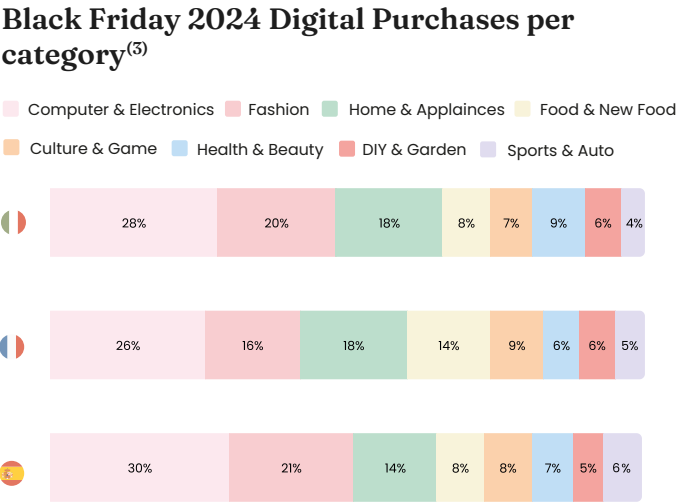
Trust plays a decisive role in how **the same offer performs in different markets**. In Italy, **73% of shoppers** say they trust Black Friday prices. In Spain the figure drops **to 53%**, and in **France only 29% trust retailers’ discounts** ⁽⁸⁾.

For companies, **this means tailoring the message**: Italians respond to clear pricing and product quality, the French need stronger proof and transparency, and Spaniards are influenced by social proof and service guarantees.



Black Friday was once defined by high-stakes bargain hunting, with shoppers queuing for the sharpest discounts on televisions, laptops, smartphones, and seasonal fashion. The event’s DNA was rooted in securing those one-off, big-ticket purchases rather than filling baskets with everyday items. By 2025, that picture has changed. **Growth is now coming from categories that rarely featured in the Black Friday playbook**: health and beauty, DIY and garden, sports, culture and games, and home.

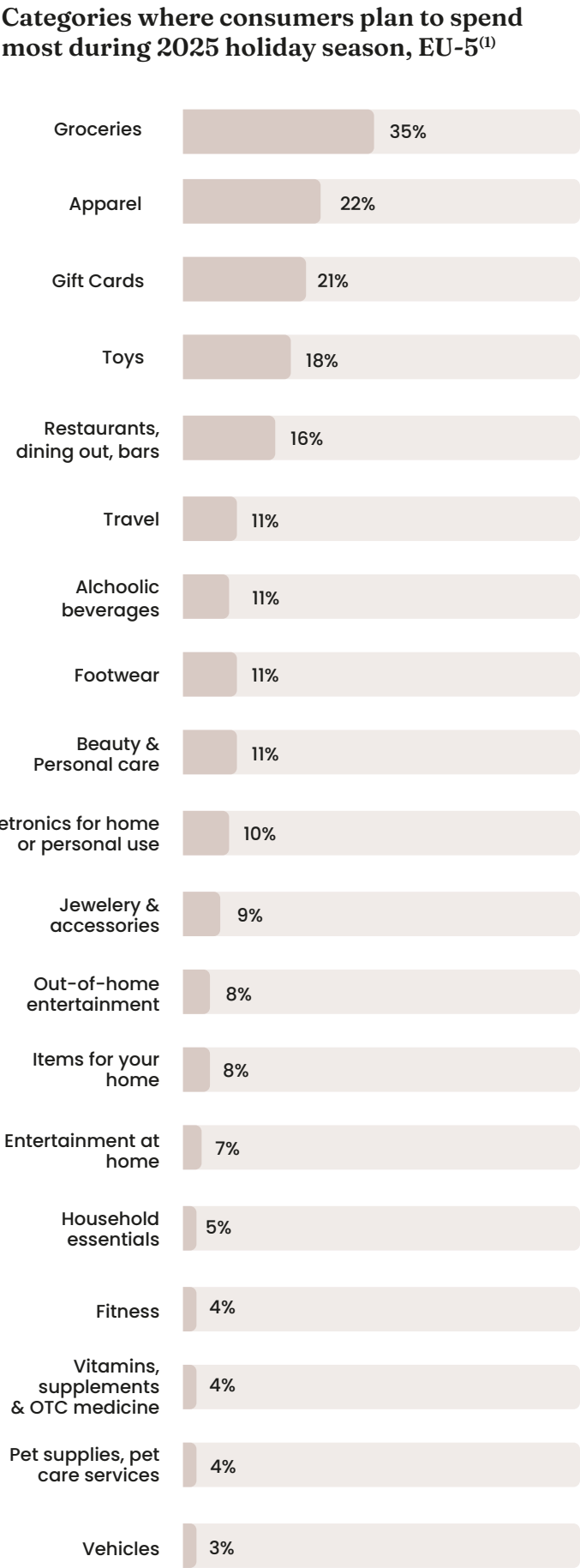
Perfumes, skincare kits, and cosmetics are driving both gifting and “stock-up” behavior, while DIY and garden reflect a consumer push toward personal projects and lifestyle upgrades. Sports and wellness gear, entertainment, and home comforts have also carved out their share, signaling that Black Friday is no longer just about tech and fashion, **it has become a season that reflects a much broader spectrum of consumer priorities**.



Financing has become an important lever to increase basket size without undermining trust, provided it is communicated with transparency. In Italy, **42% of consumers consider using installment plans** to pay for Black Friday purchases, showing a clear appetite for flexible options.

A well-presented Buy Now Pay Later (BNPL) solution **at checkout can serve as a strong differentiator**, particularly for Millennials and Gen Z, who face tighter budgets but still seek value without sacrificing flexibility.

For retailers, **the benefit is twofold**: customers gain the ability to spread payments over time, while the business still receives the full amount upfront from BNPL providers, ensuring steady cash flow during the busiest shopping period of the year.⁽²⁾



(5) PWC’S 2025 HOLIDAY OUTLOOK SURVEY, 2025 (6) FROM AWARENESS TO CONVERSION, THINK WITH GOOGLE, FEBRUARY 2025 (7) BLACK FRIDAY CONSUMER STUDY 2024: WHAT TO EXPECT, BOSTON CONSULTING GROUP, 2024 (8) 2025 E-COMMERCE TRENDS: BLACK FRIDAY BUYING BEHAVIOUR, DHL, 2025 (1) AN UPDATE ON EUROPEAN CONSUMER SENTIMENT, SEPTEMBER 2025, MCKINSEY & COMPANY (2) BLACK FRIDAY IN EUROPE: A COUNTRY COMPARISON, PWC, 2024

Planning implications for Q4 2025

Treat Black Friday as a season

Shift from a single-day push to a multi-week approach. Begin value storytelling in late October, introduce real offers in the first week of November, and intensify activity as Black Friday week approaches. This cadence matches the European “shopping hill” dynamic, capturing early researchers while still peaking during the core event.

Make value impossible to miss

Lead with transparent, standout discounts. Always show a credible reference price and one proof point that translates features into real outcomes. Where margin allows, aim above the 30% expectation threshold. Tailor tactics to your category: in Beauty, bundles boost perceived value; in DIY, project-driven landing pages help shoppers see the bigger picture.

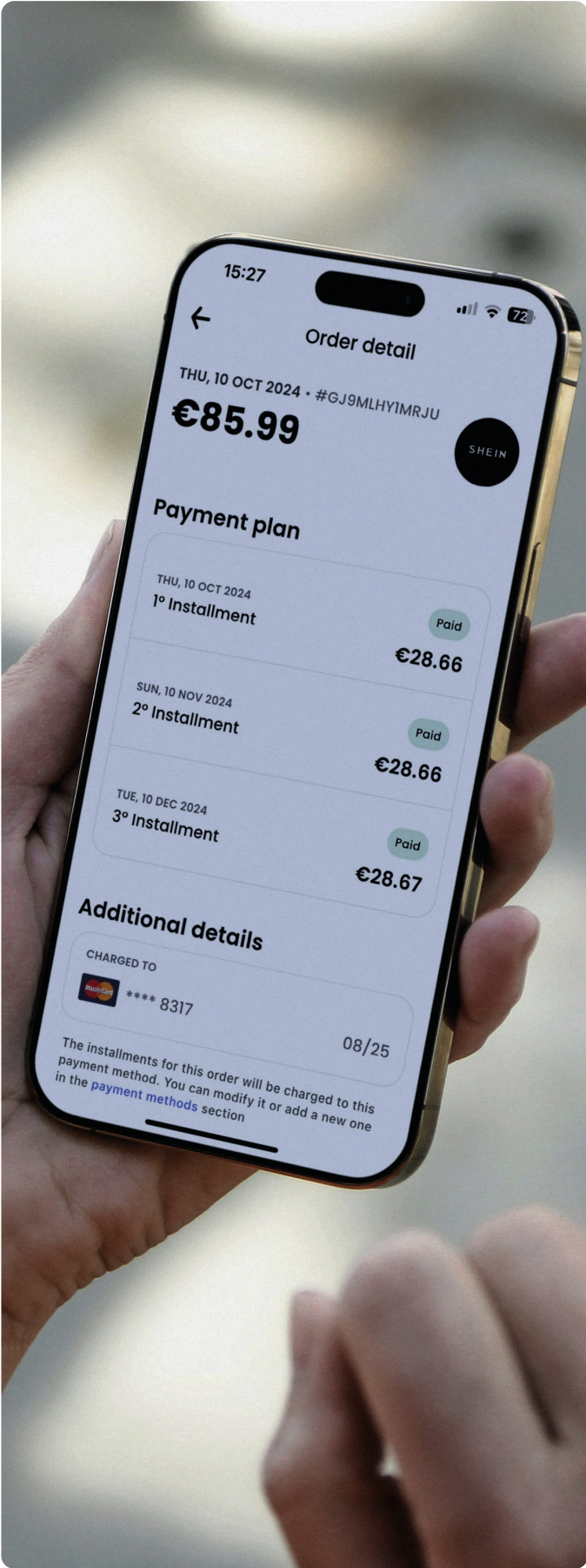
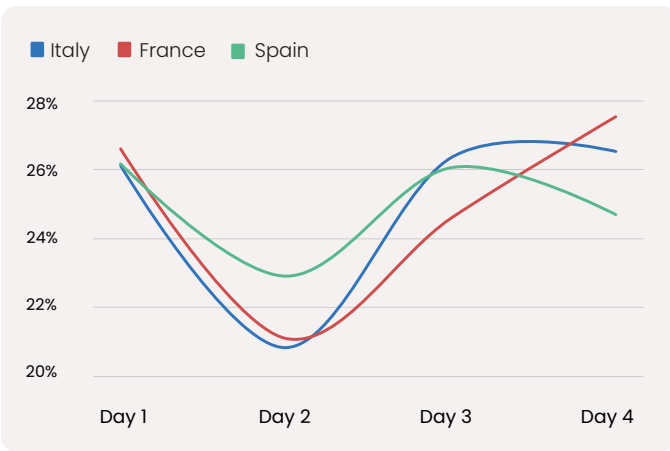
Design for omnichannel shopping

Synchronize pricing, promotions, and availability across web, app, and store. Offer click-and-collect and keep delivery windows accurate. Shoppers expect consistency across every touchpoint; any friction undermines trust at peak moments.

Offer payment flexibility

Highlight options like Buy Now Pay Later and installment plans: this allows customers to purchase more by spreading the cost over several months and take advantage of Black Friday deals without impacting their current monthly budget.

Order trends during the Black Friday weekend⁽⁴⁾



Localize for trust

Adapt to country-level expectations. In Italy, pair quality cues with transparent pricing and reliable delivery. In France, strengthen proof points and service commitments. In Spain, emphasize social proof, logistics speed, and evergreen bundles.

Remove friction at checkout

Prioritize page speed, streamlined checkout flows, minimal form fields, and honest stock visibility. Lower seasonal return rates show shoppers are buying deliberately; meet them with clarity and convenience that fosters loyalty beyond Q4.



(2) BLACK FRIDAY IN EUROPE: A COUNTRY COMPARISON, PWC, 2024 (4) SCALAPAY DATA, 2025

Black Friday 2025 Shopping Trends in Italy 🇮🇹

Insights from Scalapay

In 2024, **41% of Italian digital shoppers took part in Black Friday**, and **73% said they trust Black Friday prices**. On the Scalapay app and website, the average online order value with BNPL reached **€218**.

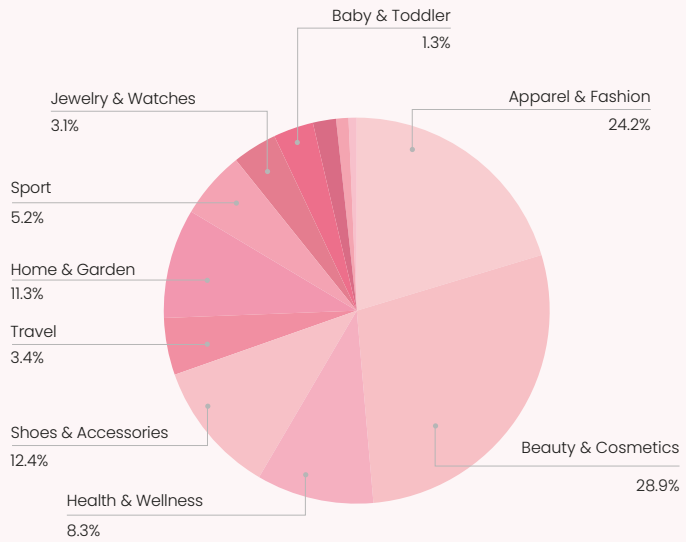
Fashion and beauty remained the leading categories, while **beauty and health** sales grew significantly compared to the previous year, confirming how Black Friday is expanding into more and more sectors.

Younger consumers played a central role: **46% of Scalapay** Black Friday shoppers were aged 18–34, up 4 points from 2023, with peak shopping hours concentrated between **15:00 and 18:00**. The calendar dynamic also evolved, as Friday accounted for 26% of orders but Sunday and Monday matched or exceeded that share, establishing **Cyber Monday as just as important**⁽⁴⁾.

Looking ahead to the 2025 holiday season, spending intentions remain resilient, with **52% of Italians planning to maintain their 2024 budgets** and 11% intending to spend more⁽¹⁾.

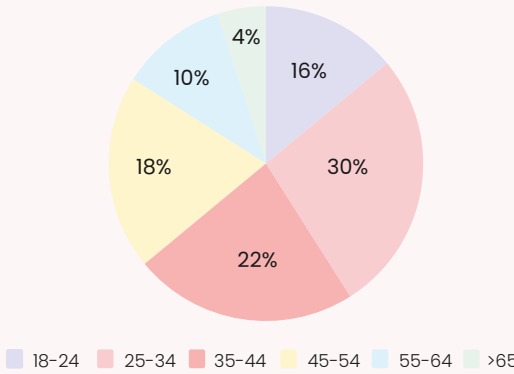
Category Breakdown of Orders⁽⁴⁾

Black Friday Weekend 2023



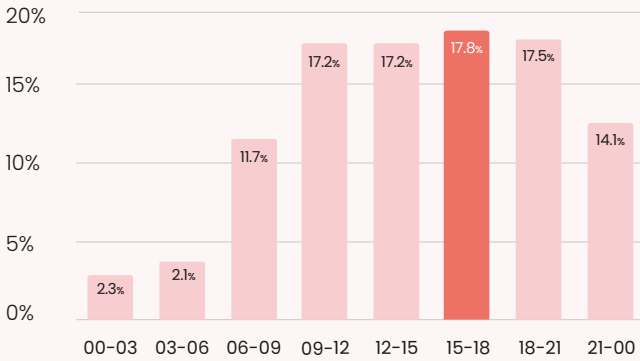
Scalapay Users' Age in Italy⁽⁴⁾

Black Friday Weekend 2024



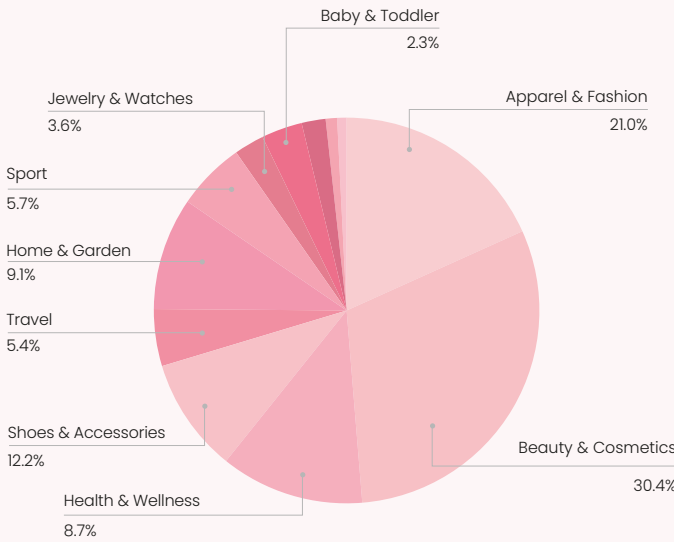
Purchases during Black Friday day⁽⁴⁾

with Scalapay, 2024



Category Breakdown of Orders⁽⁴⁾

Black Friday Weekend 2024



Average Order Value during Black Friday⁽⁴⁾

2024

18-24	25-34	35-44
126€	141€	138€
45-54	55-64	>65
136€	132€	122€

Average Order Value during Black Friday⁽⁴⁾

2024

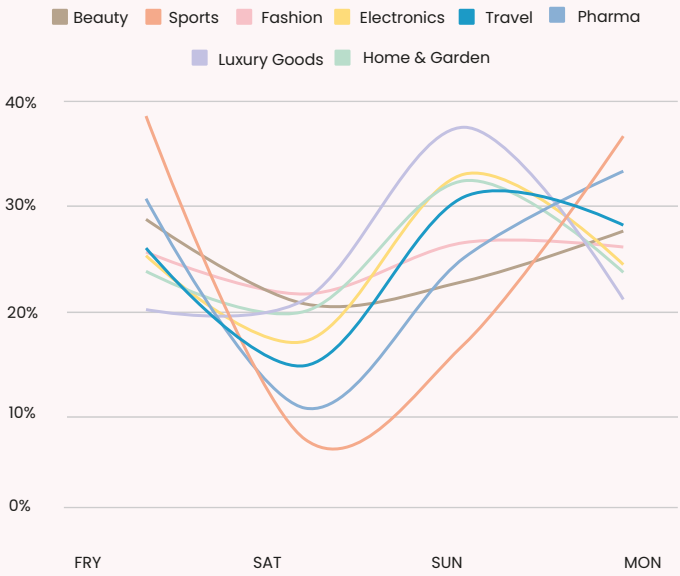
FASHION	BEAUTY	LUXURY	PHARMA
120€	113€	560€	93€
HOME	TRAVEL	SPORT	WELLNESS
244€	433€	120€	170€

Average Order Item during Black Friday⁽⁴⁾

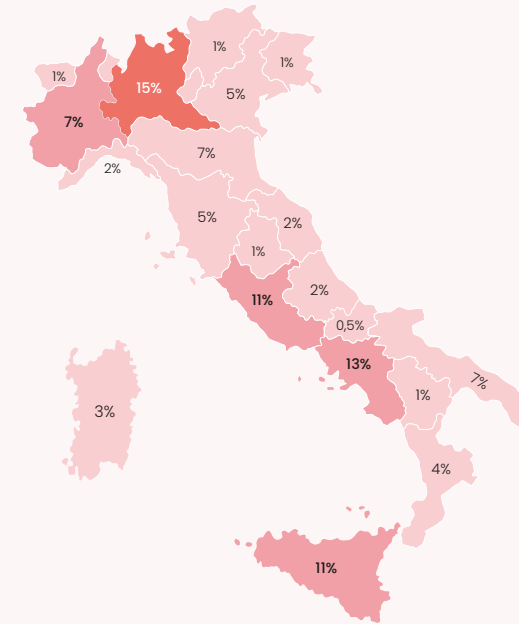
2024

FASHION	BEAUTY	LUXURY
5	3	1
HOME	PHARMA	SPORT
2	4	1

Shopping trends during Black Friday⁽⁴⁾

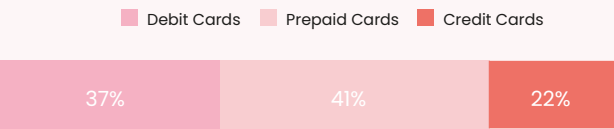


Purchases during Black Friday day⁽⁴⁾

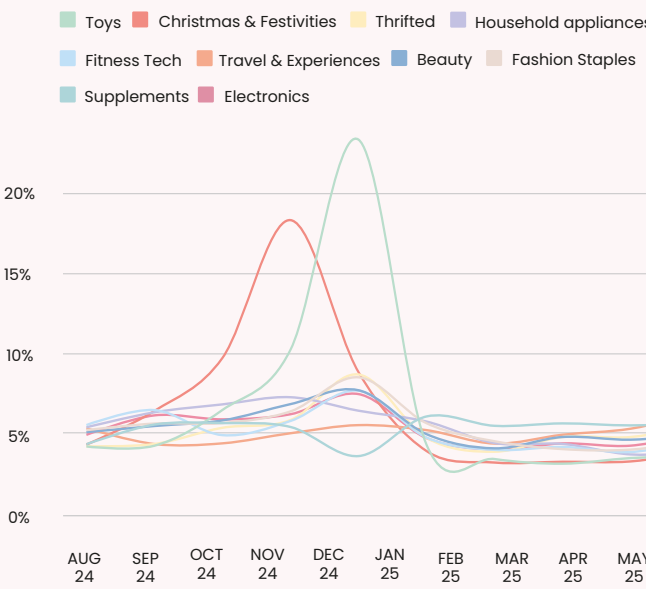


Lombardia 15%	Sardegna 3%
Campania 13%	Abruzzo 2%
Lazio 11%	Marche 2%
Sicilia 11%	Liguria 2%
Piemonte 7%	Friuli Venezia Giulia 1%
Puglia 7%	Umbria 1%
Emilia Romagna 6%	Basilicata 1%
Veneto 5%	Trentino Alto Adige 1%
Toscana 5%	Valle d'Aosta 1%
Calabria 4%	Molise 0,5%

Preferred Payment Methods Black Friday⁽⁴⁾



Most searched during Black Friday⁽⁴⁾



(1) AN UPDATE ON EUROPEAN CONSUMER SENTIMENT, SEPTEMBER 2025, MCKINSEY & COMPANY (4) SCALAPAY INTERNAL DATA, 2025

Black Friday 2025 Shopping Trends in France 🇫🇷

Insights from Scalapay

In France, Black Friday 2024 reached 46% of digital shoppers, but consumer sentiment was more cautious, with just 29% saying they trust the discounts offered.

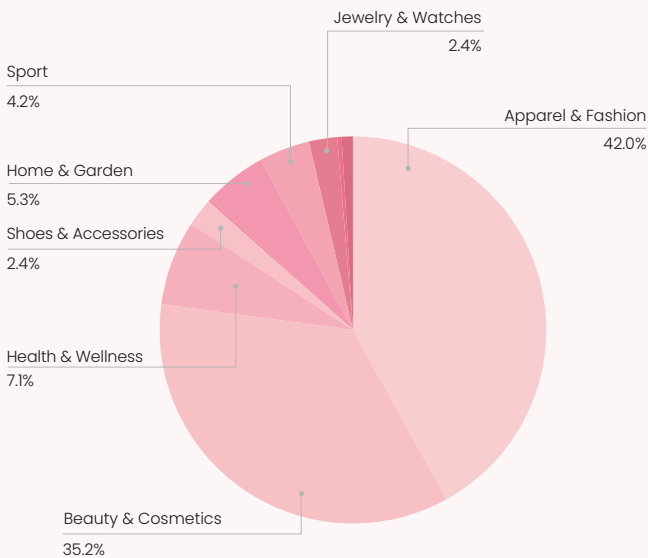
On the Scalapay app and website, the average order value with BNPL stood at €170, lower than in Italy but still showing strong engagement. Fashion dominated purchases, while beauty and health registered clear growth versus 2023, pointing to the same diversification of categories seen across Europe. Young buyers played an outsized role: 46% of Scalapay’s Black Friday shoppers were in the 18–34 age group, with activity peaking in the early afternoon between 18:00 and 21:00.

Another defining trait of the French market is the extension of sales into the days that follow Black Friday, with both Sunday and Monday showing a significant rise in orders and Cyber Monday becoming a key part of the shopping week⁽⁴⁾.

Looking forward, holiday spending intentions for 2025 remain steady, with 54% of consumers expecting to spend the same as in 2024 and 9% planning to increase their budgets⁽¹⁾.

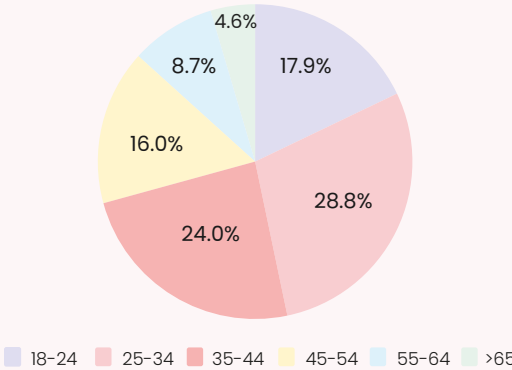
Category Breakdown of Orders⁽⁴⁾

Black Friday Weekend 2023



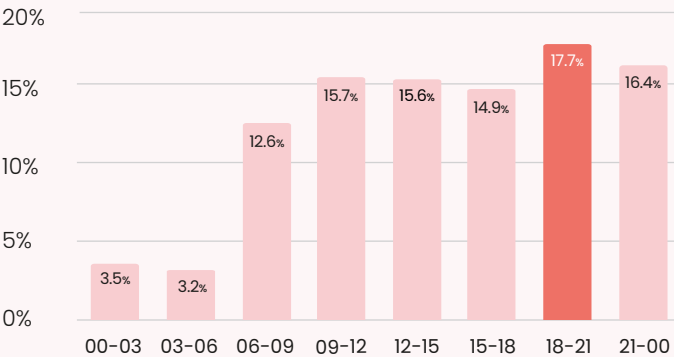
Scalapay Users’ Age in France⁽⁴⁾

Black Friday Weekend 2024



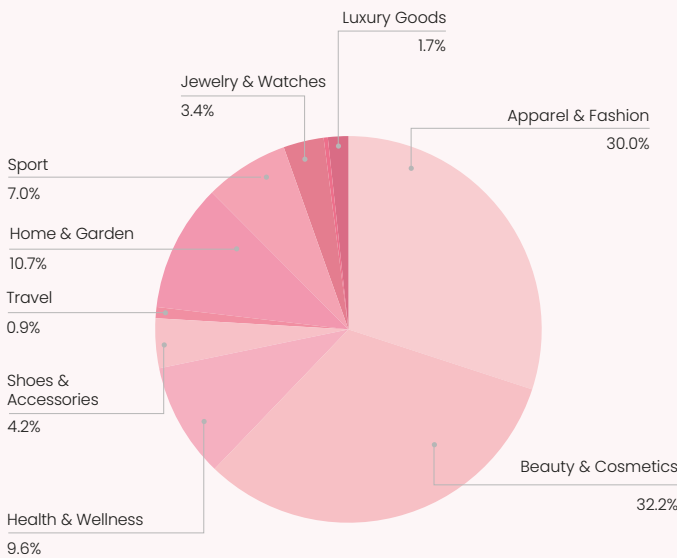
Purchases during Black Friday day⁽⁴⁾

with Scalapay, 2024



Category Breakdown of Orders⁽⁴⁾

Black Friday Weekend 2024



Average Order Value during Black Friday⁽⁴⁾

2024



Average Order Value during Black Friday⁽⁴⁾

2024

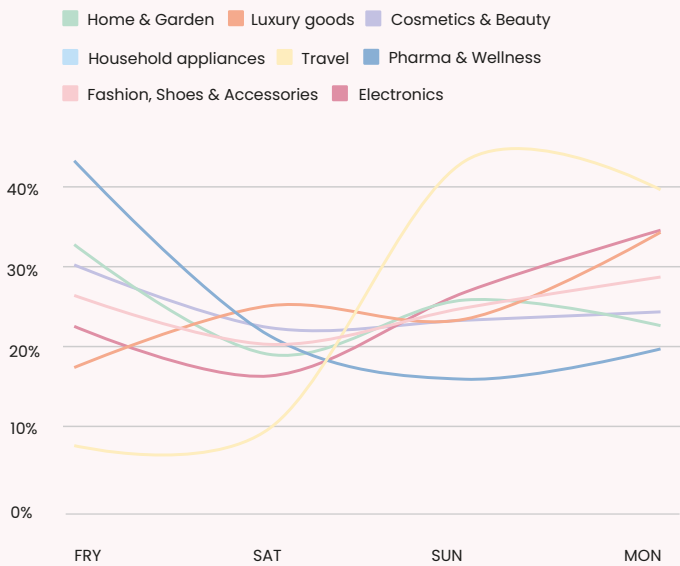


Average Order Item during Black Friday⁽⁴⁾

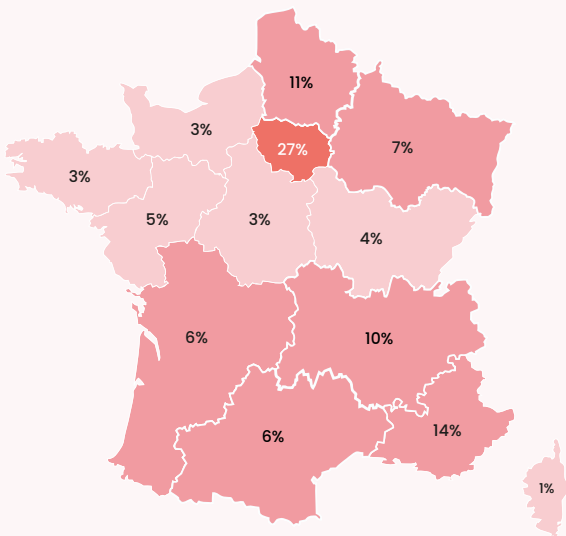
2024



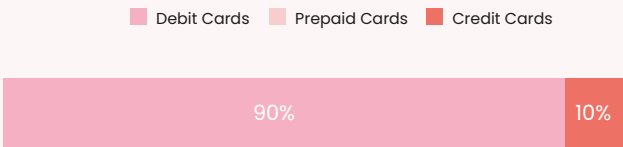
Shopping trends during Black Friday⁽⁴⁾



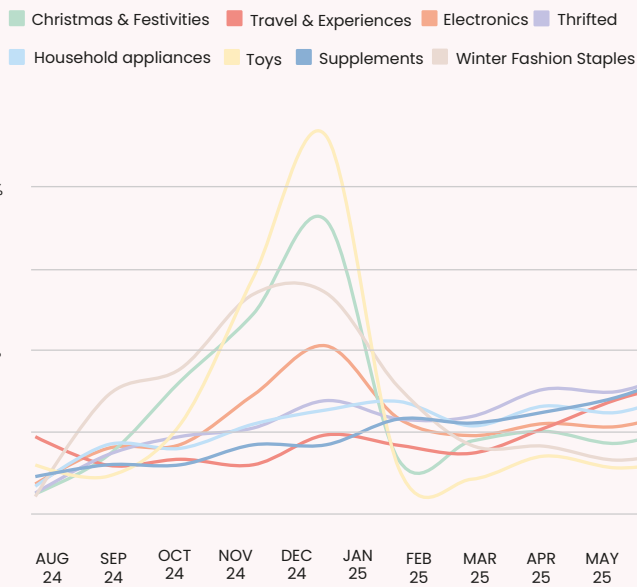
Purchases during Black Friday day⁽⁴⁾



Preferred Payment Methods Black Friday⁽⁴⁾



Most searched during Black Friday⁽⁴⁾



(1) AN UPDATE ON EUROPEAN CONSUMER SENTIMENT, SEPTEMBER 2025, MCKINSEY & COMPANY (4) SCALAPAY INTERNAL DATA, 2025

Black Friday 2025 Shopping Trends in Spain

Insights from Scalapay

In Spain, participation in Black Friday 2024 was lower than in other major markets, **with 37% of digital shoppers taking part**, yet confidence in the event was higher, **as 53% of consumers said they trust Black Friday** prices.

On the Scalapay app and website, **the average BNPL order value reached €164**. Beauty was the category showing the clearest year-on-year growth, adding to the broader lifestyle focus of Black Friday shopping.

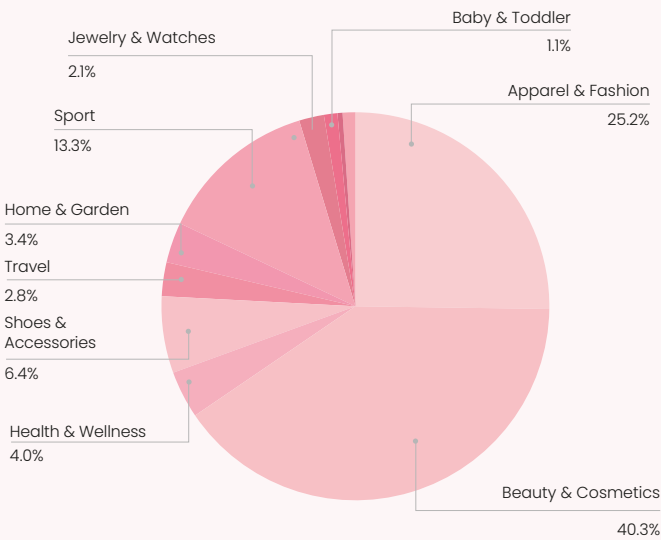
Younger buyers were again central, **with 41% of Scalapay** Black Friday shoppers in the 18–34 bracket, and purchases most often placed between **21:00 and 00:00**.

Spain also mirrors the wider European trend of a prolonged shopping window: orders gained momentum on Sunday and Monday, underlining that activity does not stop with Friday itself.⁽⁴⁾

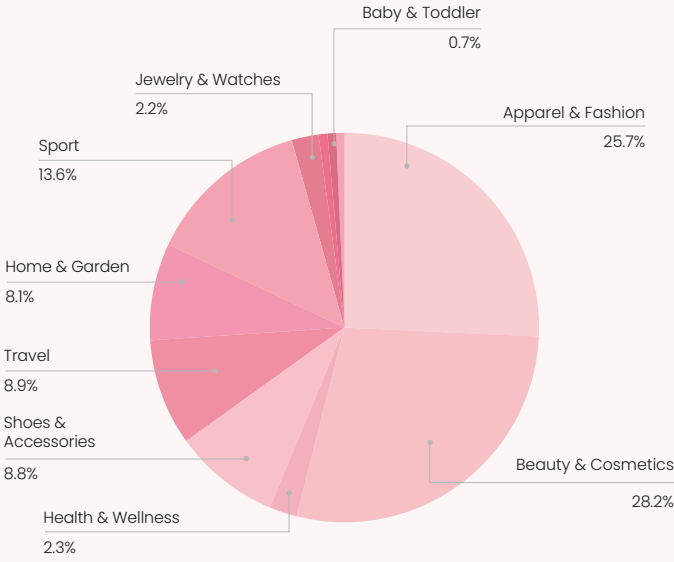
Looking ahead to the 2025 holidays, **Spanish consumers appear the most optimistic**, with 63% planning to spend the same as in 2024 and 14% expecting to increase their budgets⁽¹⁾.

Category Breakdown of Orders⁽⁴⁾

Black Friday Weekend 2023

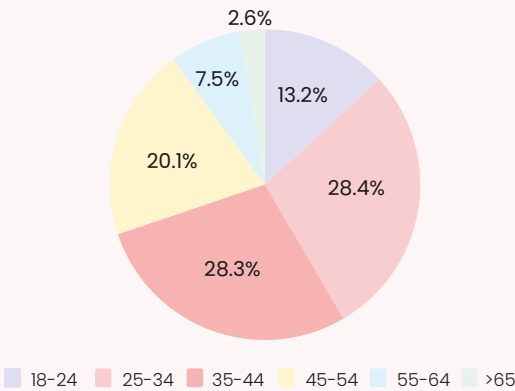


Black Friday Weekend 2024



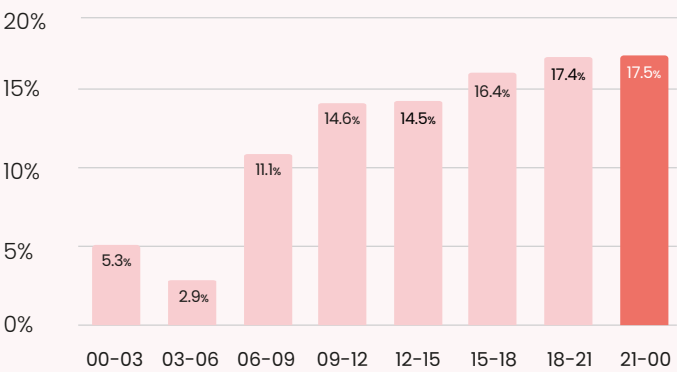
Scalapay Users' Age in Spain⁽⁴⁾

Black Friday Weekend 2024



Purchases during Black Friday day⁽⁴⁾

with Scalapay, 2024



Category Breakdown of Orders⁽⁴⁾

Average Order Value during Black Friday⁽⁴⁾

2024



Average Order Value during Black Friday⁽⁴⁾

2024

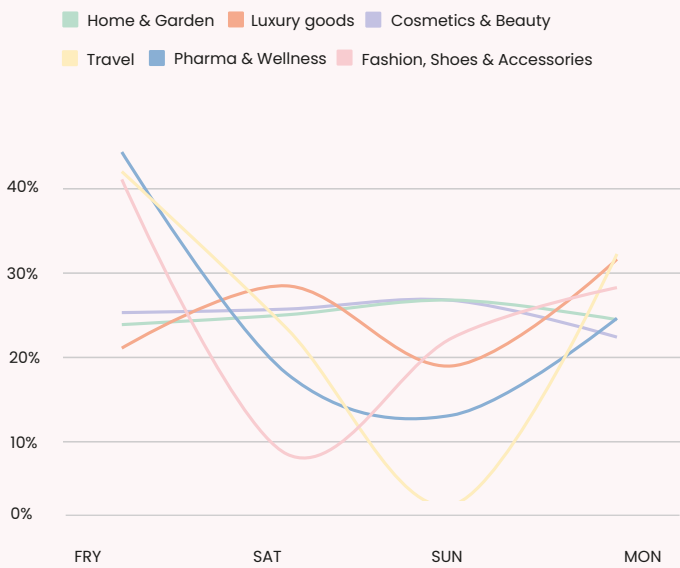


Average Order Item during Black Friday⁽⁴⁾

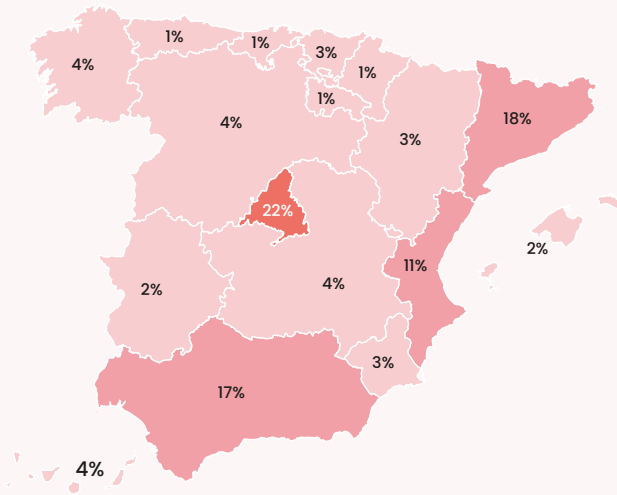
2024



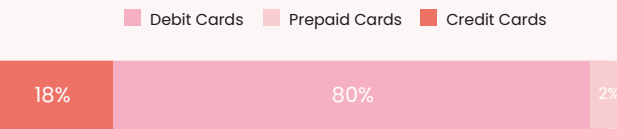
Shopping trends during Black Friday⁽⁴⁾



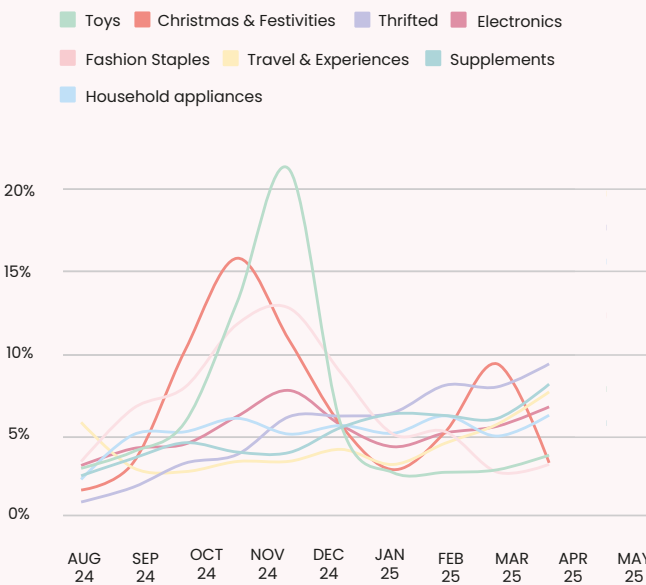
Purchases during Black Friday day⁽⁴⁾



Preferred Payment Methods Black Friday⁽⁴⁾



Most searched during Black Friday⁽⁴⁾



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Scalapay and co-marketing during the Peak Season



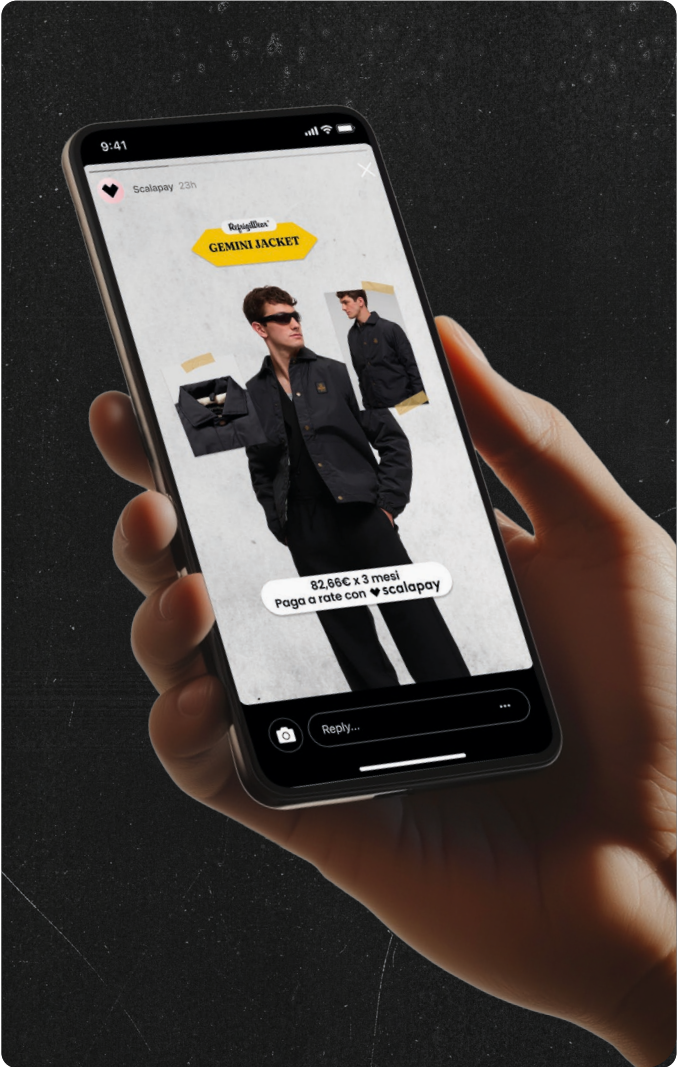
Scalapay customers enjoyed **special benefits** throughout, from early access starting on November 21, to exclusive deals during Late Black Friday, and an **extra 10% discount during Winter Sales**. The results exceeded expectations across every KPI. The campaign generated over **10x more clicks** per day compared to the 2024 average. The conversion rate more than doubled, reaching a peak of over 5x the yearly average during the first day of Late Black Friday. Orders also experienced a remarkable uplift, growing by more than 3.5x versus 2024 benchmarks.

Engagement and visibility played a key role in this performance. Newsletters achieved an open rate significantly above industry averages, with strong click activity directed towards the featured brand highlights. This engagement successfully converted into **tangible results**, proving the effectiveness of Scalapay’s exclusive customer mechanics.

Success Story

In 2024 **Refrigiwear** decided to partner with Scalapay to capture the Peak Season’s full potential. The goal was clear: **maximize visibility, drive conversions, and create a seamless shopping experience** for customers who increasingly expect flexibility and exclusive benefits during peak season.

To achieve this, Scalapay and Refrigiwear planned a **three month campaign** which guaranteed visibility and combined multiple touchpoints. The campaign kicked off in November with **a strong focus on Black Friday**, extended with a Late Black Friday phase from December 3–5, and continued with **Winter Sales promotions in February**.



In terms of business outcomes, **the campaign delivered a +44% uplift** in total transaction value compared to the previous Black Friday period, alongside a **+18% increase in average order value**. This proves that the partnership not only generated incremental sales in the short term, but also strengthened long-term customer acquisition and loyalty.

The Refrigiwear case demonstrates how combining exclusive **Scalapay activations with key seasonal campaigns can create powerful results**: higher engagement, stronger conversions, and substantial sales growth. For brands competing in crowded moments like Black Friday, this partnership shows how **payment innovation** can be turned into a true business growth lever.

♥scalapay | RefrigillWear® campaign results

Scalapay Sponsored

♥scalapay | RefrigillWear®

Extra 10% di sconto sui saldi invernali con ♥scalapay

LA PROMO TERMINA IL 28 FEBBRAIO

Discover More

⊕ 10x more clicks per day

⊕ 5x avg conversion rate

⊕ 3.5x orders uplift

⊕ 18% increase in average order value

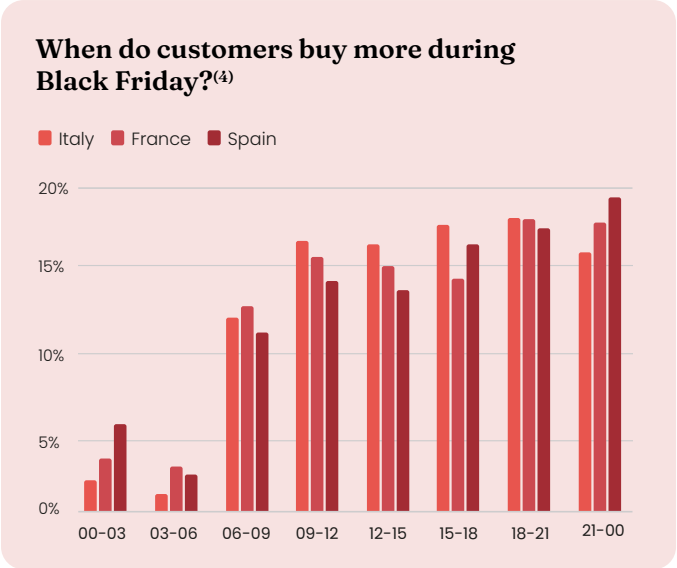
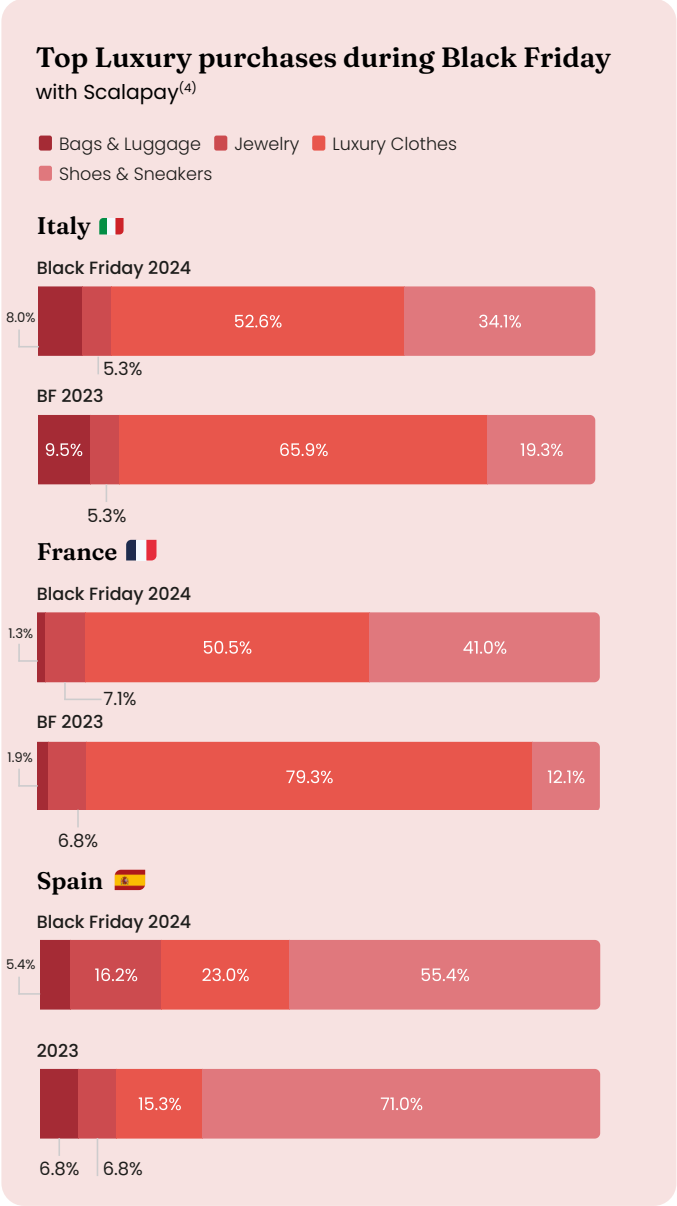
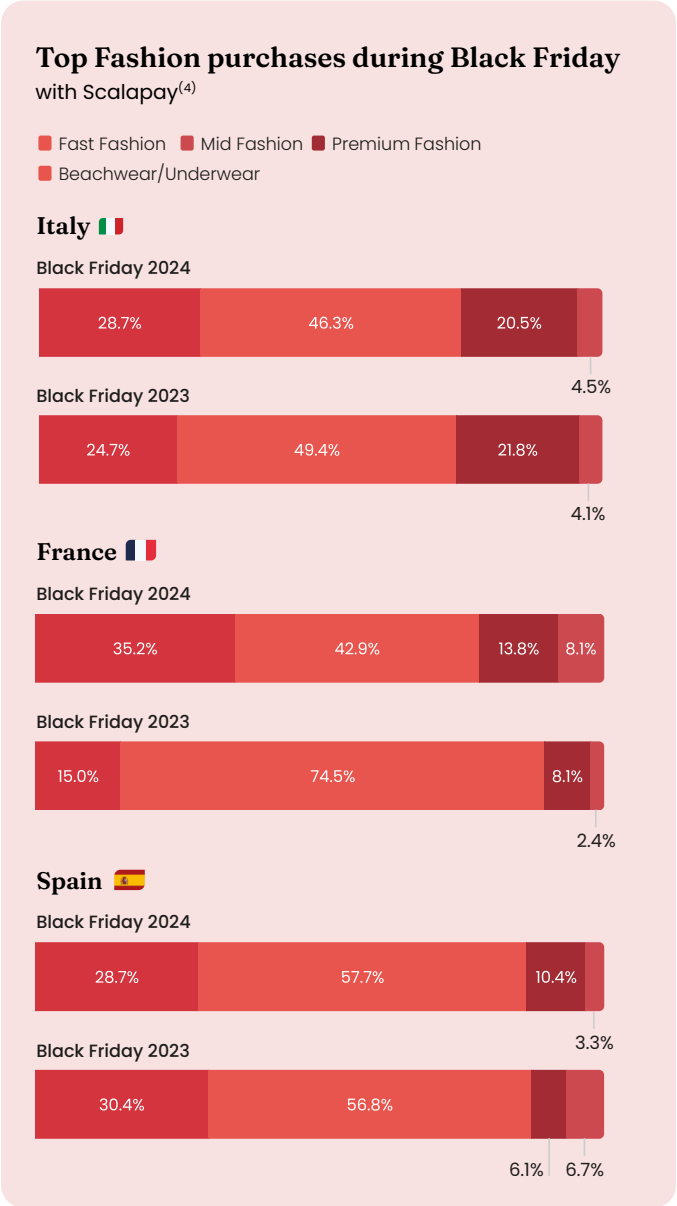
⊕ +44% uplift in total transaction value

The partnership not only generated incremental sales in the short term, but also strengthened long-term customer acquisition and loyalty.

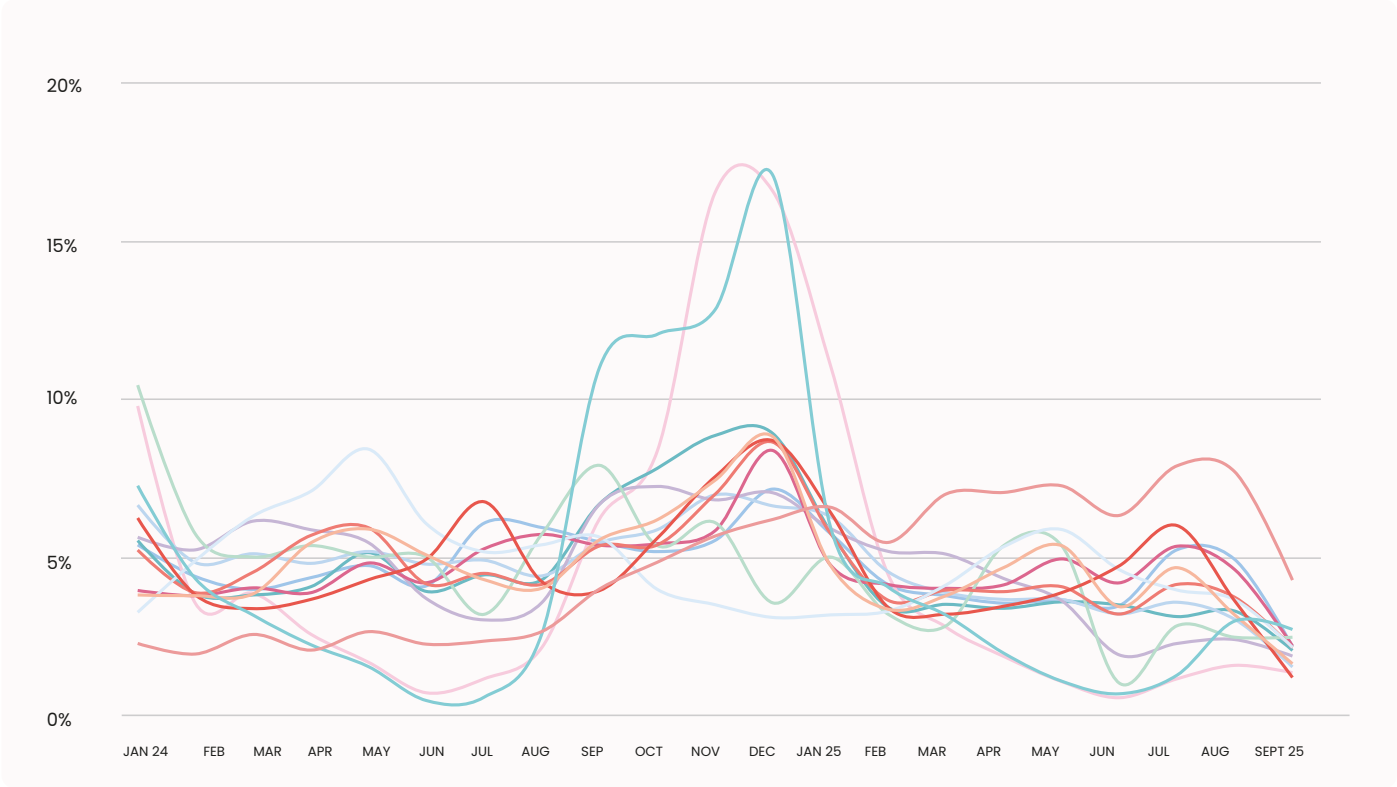
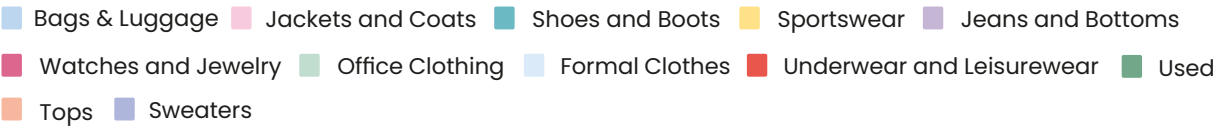
Learn More

Fashion & Luxury

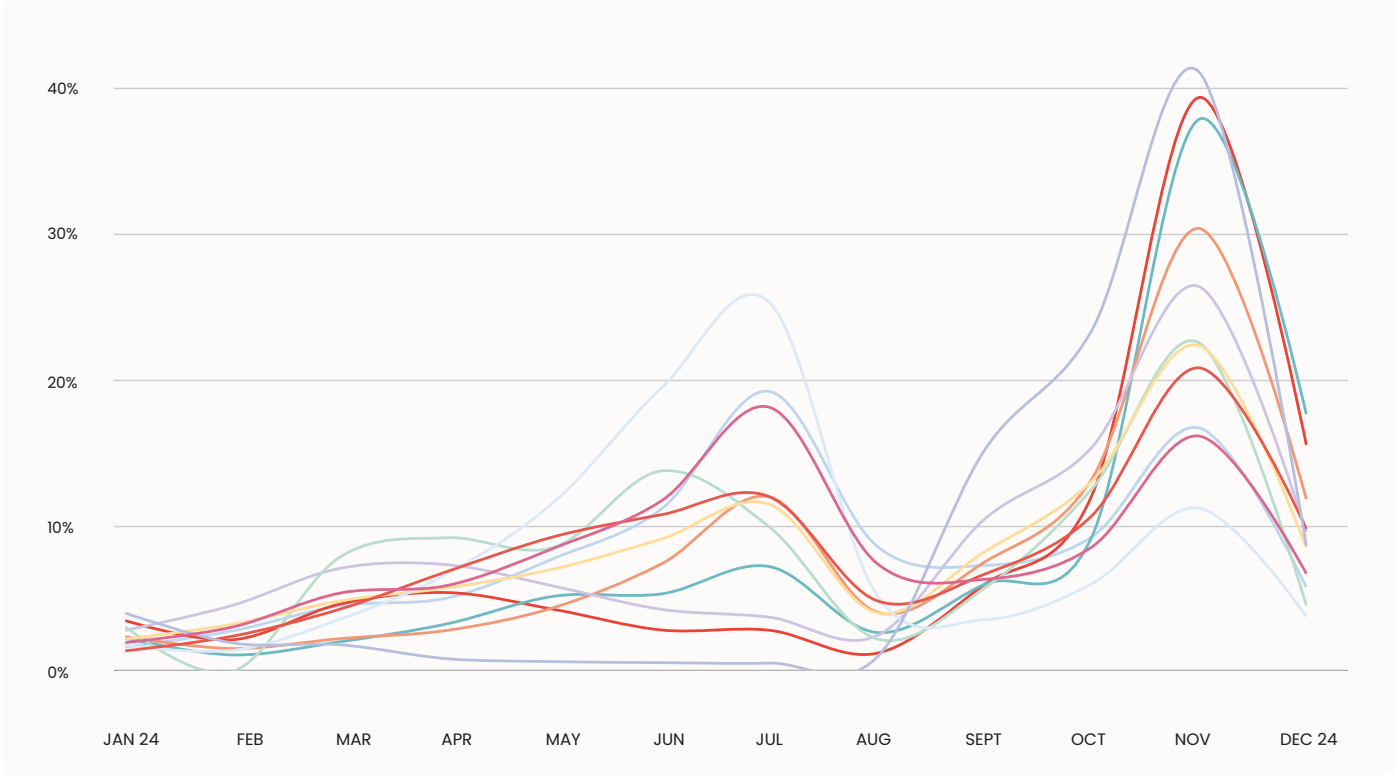
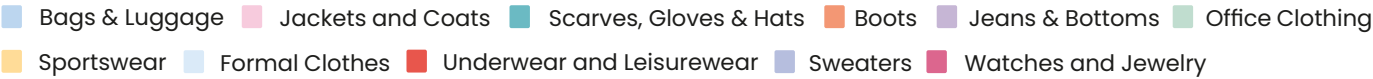
Peak season shopping trends



Most searched Fashion products during the year - 2024/2025 on Scalapay⁽⁴⁾



Most purchased Fashion items during the year with Scalapay⁽⁴⁾



(4) SCALAPAY INTERNAL DATA, 2025



Fashion Trends: how demand is shifting, why “little luxuries” matter, and what to build next

Luxury and premium fashion are entering a reset. In 2025, the personal luxury goods market is expected to contract by 2 to 5% (the steepest decline since the financial crisis, excluding the pandemic years). **Experiential luxury** is proving more resilient, while winning brands are redefining value, accelerating content, and designing spaces that people want to visit.⁽⁹⁾

1. The new little luxury: bag charms and micro upgrades

At first glance, a **miniature leather crab** dangling from a Louis Vuitton tote seems trivial. But look closer, and it reveals **how the industry adapts in downturns**. When sales of handbags slow, brands sell the dream in smaller doses. The viral bag charm craze is not just frivolity; it is strategic. The phenomenon has been labelled as quite opportunistic, but it still works. If consumers hesitate to buy a \$3,000 purse, they **might still spend \$300 to refresh the one they already own**. After all, you can mix and match the charms and put it on different bags.

For executives, the lesson is clear: **the “little luxury”** functions as both a revenue stream and retention tool. A charm might not change the balance sheet, but it keeps the customer in the brand’s orbit. Losing them entirely would be far worse.

2. Hospitality as the New Runway

As sales decline, luxury brands **are building experiences**. Dior’s new spa in New York offers not just facials but “Dior Measurements” of collagen, hydration, and elasticity. Coach, meanwhile, is betting on coffee. With cafés opening across outlet malls, complete with Tabby bag-shaped cakes and collectible totes, the brand is tapping into something retailers often overlook: linger time. According to these brands, the branded shops are not a vanity project, but profitable ventures designed to keep customers inside the brand ecosystem longer. The more time spent in the brand ‘world,’ the more likely the purchase. **Hospitality** reframes fashion retail as a cultural space. It is no longer about what hangs on racks but about how long people want to stay. For executives, the opportunity lies in blending commerce with community, allowing stores to become both transaction hubs and social destinations.



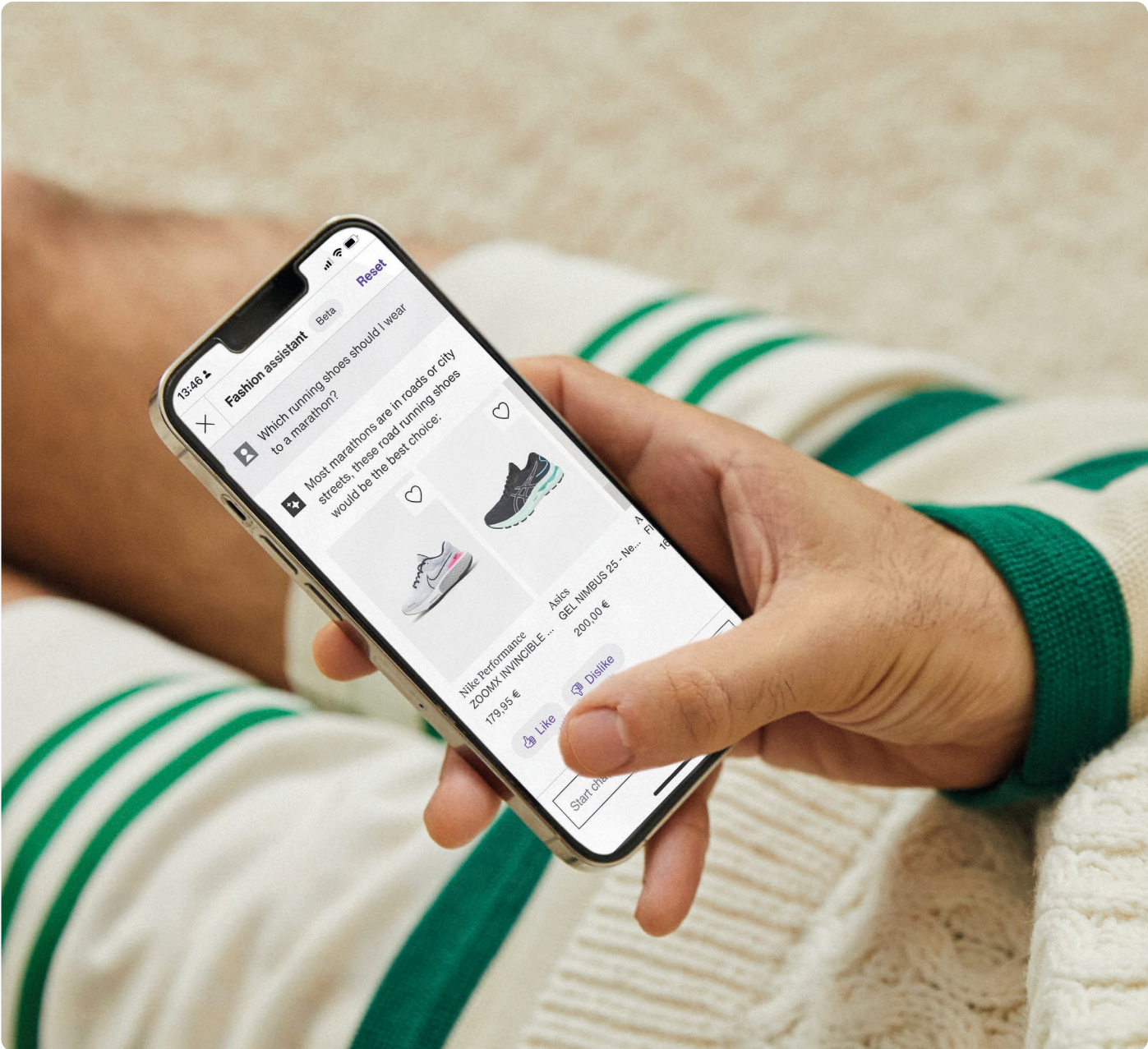
AI: Fashion’s New Creative Partner

While charms, dupes, and spas capture headlines, a quiet revolution is happening behind the scenes. **Artificial intelligence is reshaping how campaigns are conceived, produced, and deployed.**

Zalando’s AI toolkit allows a hiking boot to appear instantly on a mountain, or a dress to be reimaged in seasonal contexts, with turnaround times reduced from eight weeks to four days. Mango quadrupled its ad revenue by automating creative variations with Smartly. And for many more brands, removing backgrounds across their product catalog and re-generating seasonal scenes transformed scale into personalization.

Yet the insight here is not about machines replacing creativity. AI still doesn’t have human taste and vision, however, it can certainly lower the cost of experimentation. Where once trying a risky campaign meant six figures and weeks of production, now it is a prompt and a few clicks. Creativity can afford to be bolder because the risk is smaller.

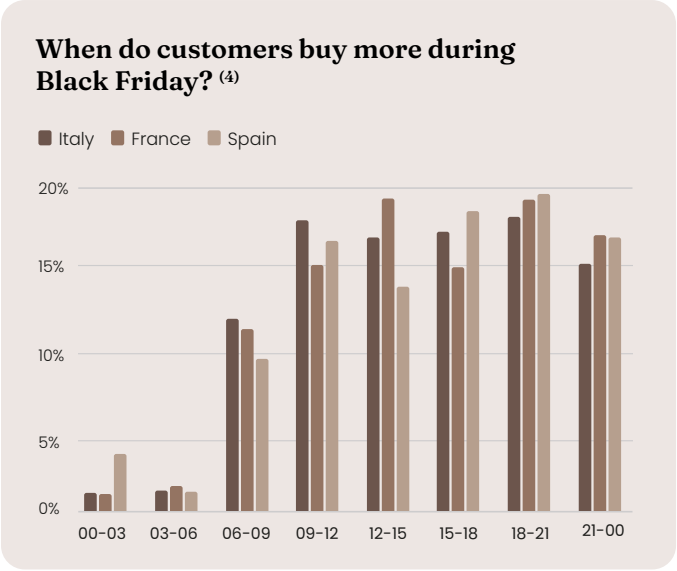
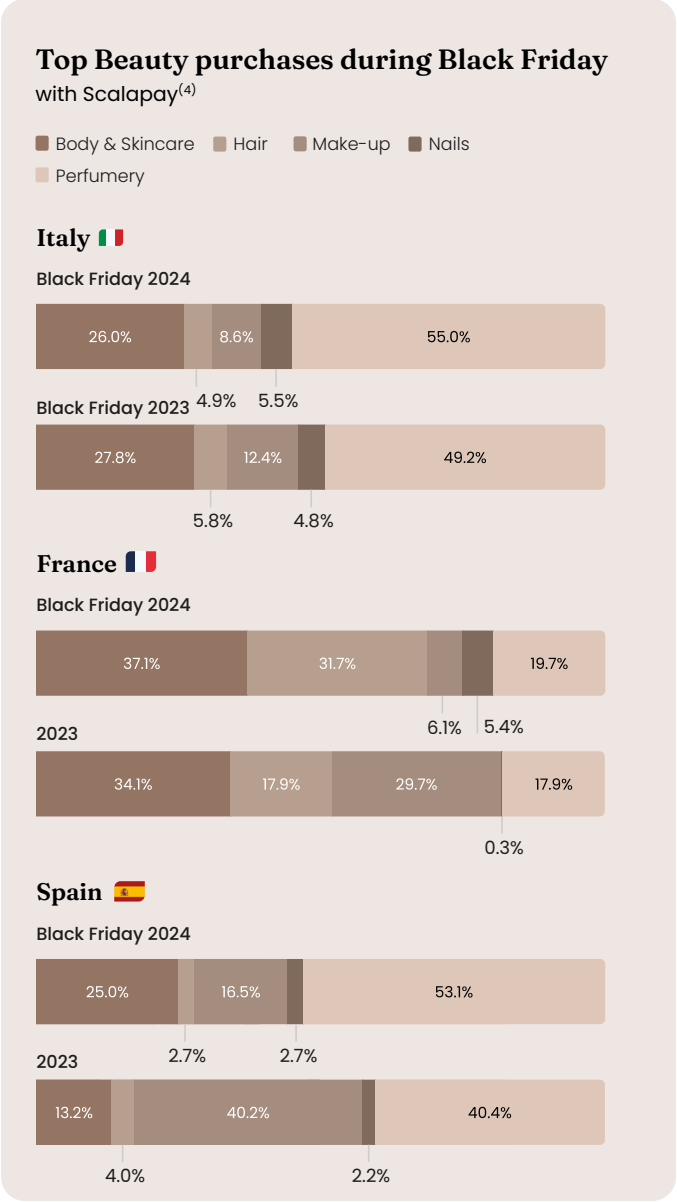
The negative side? For managers this lies not in adoption, but in overreliance. Without strong human direction, AI-produced content risks feeling generic. The winning formula is human-led ideas amplified through machine-driven variation.



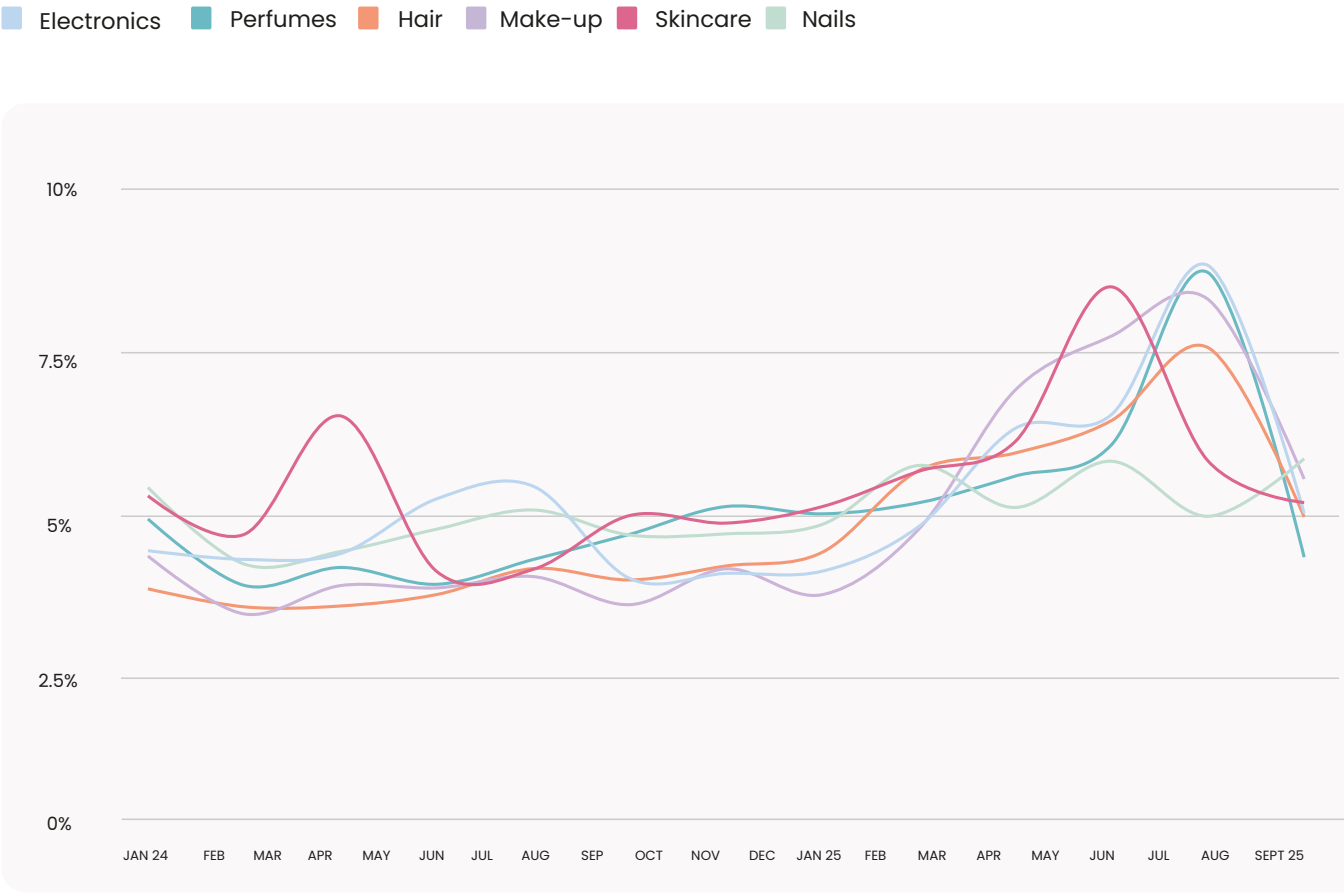
(9) BUSINESS OF FASHION, 2025

Beauty & Cosmetics

Peak season shopping trends

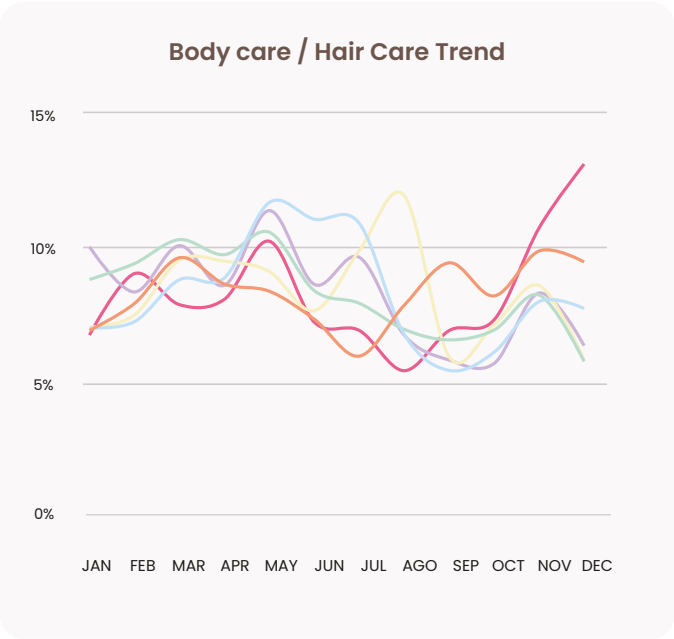
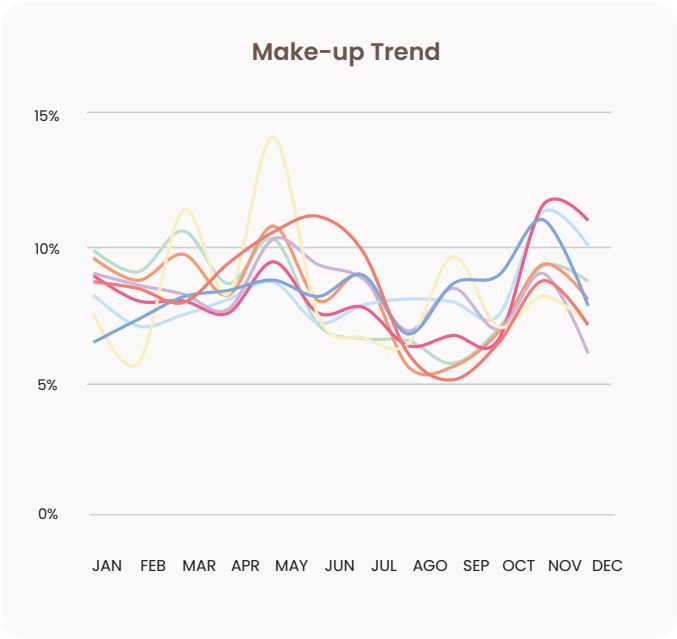


Most searched Beauty products during the year - 2024/2025 on Scalapay⁽⁴⁾



Most purchased Beauty items during the year - 2024 with Scalapay⁽⁴⁾

■ Lip products ■ Mascara & Eyeliner ■ Accessories ■ Waterproof products ■ Perfume ■ Creams, Oils & Serums ■ Hair ■ Masks ■ Hair removal
■ Primer & Bases ■ Blush ■ Powder ■ Bronzer ■ Toners & Sprays



(4) SCALAPAY INTERNAL DATA, 2025



The 160 Dollar Lipstick and the Value Question

When Louis Vuitton unveiled its first full makeup line last summer with Pat McGrath, the surprise wasn't the sculptural packaging or the palette of 55 shades. It was the price. **At \$160 per lipstick** and \$250 per palette, Vuitton leapfrogged Hermès, Clé de Peau and even Chanel's couture editions.

The launch landed **in a fragile moment**. As we have seen in the previous chapter, **consumer confidence is low**, and while beauty has often been a safe haven in downturns, recent research shows a trade-down effect: a quarter of consumers are shifting to cheaper products, and nearly two-thirds doubt that premium brands truly outperform mass labels on efficacy⁽⁹⁾. Against that backdrop, Vuitton's lipstick becomes more than a SKU: it is a test of whether heritage alone can justify luxury pricing when wallets are tight.

The risk is tone-deafness. In good times, status pricing fuels aspiration. In leaner times, it risks alienating the wider audience whose admiration sustains halo effects even if they never buy. The parallel boom in dupes (cheaper, social media-driven alternatives that promise a similar look for a fraction of the price) makes the challenge sharper, as consumers feel less need to stretch for the original. Vuitton must prove its \$160 bullet offers artistry, sensorial payoff, and formula as elevated as its packaging, or risk turning a flagship debut into a cautionary tale.

For e-commerce leaders, the signal is clear: brand equity no longer sells on its own. Premium launches must now be backed by transparent ingredient storytelling, detailed reviews, and content that makes performance visible in real life.

AI in Beauty: From Vibe Marketing to Generative Engine Optimisation

If Vuitton's lipstick forces brands to reconsider the logic of price, artificial intelligence forces them to reconsider the logic of marketing itself. On the supply side, agencies and beauty conglomerates are using generative AI to produce **"vibe marketing"**, a shorthand for AI-assisted content creation that translates briefs, palettes, and moodboards into thousands of variations of campaign imagery, packaging mock-ups, and even fragrance accords.



On the demand side, consumers are turning to generative engines like ChatGPT for recommendations, **creating a new discipline some are calling GEO, generative engine optimisation**.

The efficiencies are undeniable, **yet speed comes with costs**. Cultural nuance is easily lost when models are trained on biased datasets. Consumers grow skeptical when they suspect a face or before-and-after shot has been synthesized. The term "AI slop" has entered the lexicon to describe content that feels mass-produced, soulless, and interchangeable. To mitigate the risk, some brands have appointed AI ethics officers or published responsible AI policies, making explicit where they use AI and where they refuse to, particularly around human likeness.

On the consumer side, **the shift is just as dramatic**. With 700 million weekly users on ChatGPT alone, the "ChatGPT glow-up" has become mainstream. Shoppers upload selfies, ask for full skincare routines, and request personalized shade recommendations. According to Nosto⁽¹⁰⁾, 52% of Gen Z already prefer AI platforms to Google or Amazon for skincare queries. For brands, this means visibility within generative engines has become as critical as visibility in search once was. **But GEO is harder to game**: large language models prioritize credible sources like media, peer-reviewed research, community platforms such as Reddit, over backlinks or keyword stuffing.

The stakes are high. If your product does not appear in the AI's answer, it risks being invisible at the very top of the funnel. If it does appear but is misrepresented, you risk losing trust before a shopper ever visits your site. The new funnel begins not in a search bar but in a conversation with an algorithm, and the brands **that treat accuracy as a KPI**, not a legal formality, will be the ones that remain discoverable.

Shoppers upload selfies, ask for full skincare routines, and request personalized shade recommendations. According to Nosto⁽¹⁰⁾, 52% of Gen Z already prefer AI platforms to Google or Amazon for skincare queries.



After the Fragrance Boom: What Comes Next?

The third story shaping beauty this quarter is **fragrance**. For the past two years, fragrance has been the industry’s growth engine, with gourmand nostalgia leading the charge. Scents like vanilla, caramel, and cotton candy dominated TikTok and department store counters alike, tapping into a collective desire for **comfort and indulgence** after years of uncertainty. But booms do not last forever. Growth in prestige fragrance slowed to six percent in the first half of 2025, outpaced by mass launches, and even die-hard enthusiasts admit **that niche has become crowded**.

Suppliers are already adjusting. Givaudan, one of the world’s largest fragrance manufacturers and the nose behind blockbusters like Carolina Herrera’s “Good Girl,” has unveiled a 2030 strategy that shifts focus **toward skincare, makeup, and biotech-driven actives**. The company is positioning itself not just as a supplier of scents but as a full-spectrum partner for beauty brands seeking **innovation in ingredients, formulation, and finished products**. The future of fragrance may be less about new gourmand launches and more about hybridization—functional mists with skincare benefits, layering kits that invite play, or pillar scents animated across multiple categories.

The **fragrance boom** has taught consumers to expect storytelling, collectability, and ritual, not just juice in a bottle. **Physical and digital shelves have evolved**, emphasizing discovery through minis and sets, supporting education with storytelling tools, and leaning on transparency in sourcing and formulation as consumers grow more discerning.

Nostalgia still sells, but it cannot be repeated indefinitely without fatigue. The gourmand wave may fade, but the underlying desire, for scents that connect emotionally and deliver an experience beyond wear, remains a powerful signal. The task now is to channel that desire into formats and categories that can sustain growth, rather than chase another sugar high.

Growth in prestige fragrance slowed to six percent in the first half of 2025, outpaced by mass launches, and even die-hard enthusiasts admit that niche has become crowded



Advent Mania and the Shifted Calendar

If fragrance was the story of the last two years, 2025’s **surprise obsession is the beauty advent calendar**. What was once a seasonal novelty has become a battleground for attention and loyalty, with brands from Dior to indie skincare labels racing to release their limited-edition sets earlier each year. By late July this year, social feeds were already flooded with sneak peek videos, long before most consumers had even left for their summer holidays. For e-commerce managers, the implication is clear: **the promotional calendar has shifted**.

The logic behind advent calendars is straightforward. They offer **a concentrated dose of discovery**: miniatures, limited shades, and collectible packaging that promise more than the sum of their parts. For consumers, they are both a treat and a deal—an entire month of luxury presented at a bundled price. For brands, they are a way **to introduce customers to a wide swath of the portfolio**, from core pillars to seasonal launches, while also driving early revenue ahead of the crowded holiday season. But the acceleration has consequences.

When sets drop in July and August, **companies are forced to rethink inventory, marketing, and even consumer psychology**. Promotional calendars that used to be built around Black Friday or Singles’ Day must now accommodate a mid-summer launch window for what has effectively become the biggest gift set of the year. The challenge is managing demand **without cannibalising the core assortment**. If shoppers invest early in an advent calendar, will they return in November for more? Or does the July purchase lock them out of subsequent campaigns?

They offer a concentrated dose of discovery: miniatures, limited shades, and collectible packaging that promise more than the sum of their parts.

Brands that succeed in this **new cycle are treating advent calendars** less as seasonal novelties and more as strategic pillars. They stage pre-launch waitlists, create content pipelines that stretch across months, and use the calendar as a hook for storytelling around heritage and innovation.

They also design versions at multiple price points to capture different tiers of consumers, ensuring that the luxury version does not exclude those who want to participate in the ritual at a more accessible level.

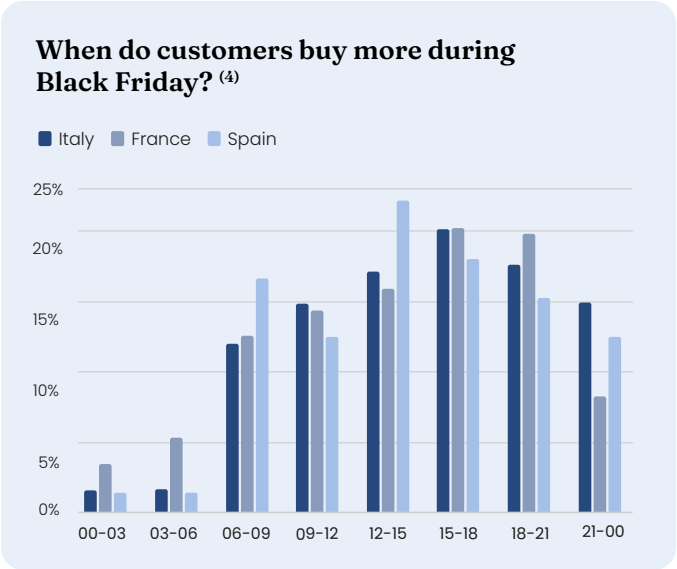
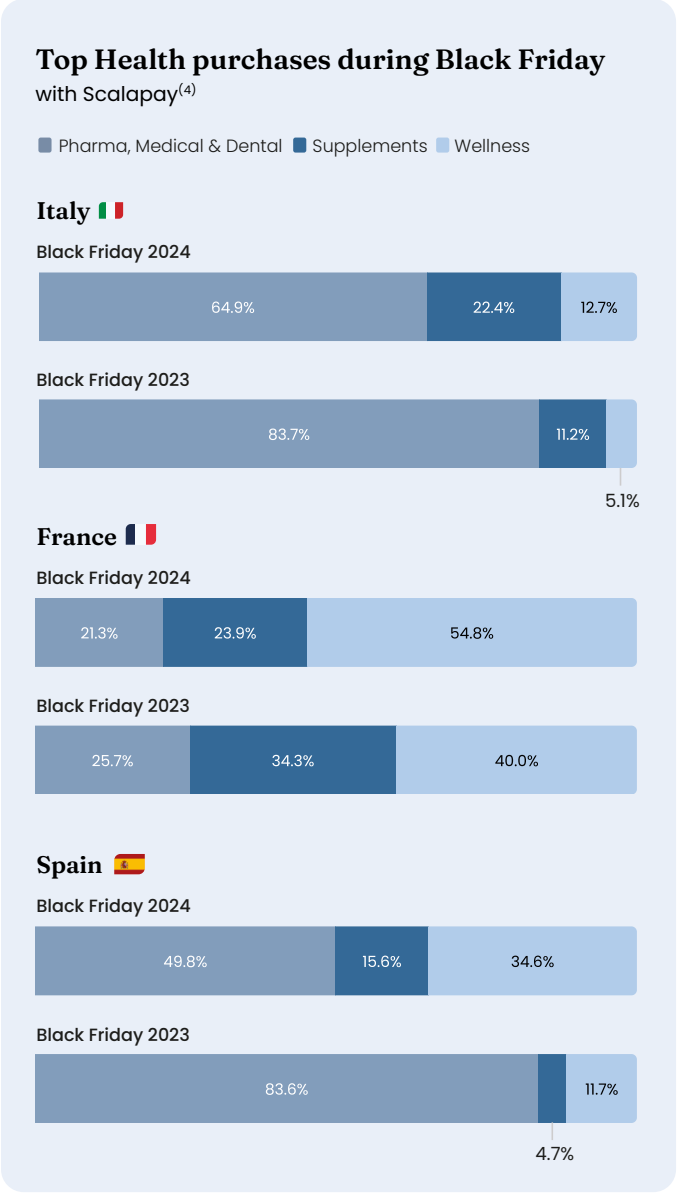
For e-commerce leaders, **the operational demands are significant**. Fulfilment must be flawless, as delays in September or October undercut the very logic of an **“early” launch**. Customer experience teams must be ready to manage the hype cycle, where waitlist frustrations can quickly turn into reputational risks on TikTok or Reddit. Above all, digital shelves must be calibrated for scarcity marketing **without disappointing the broader audience that arrives too late**.

Advent calendar mania is not a passing fad. It has reshaped the rhythm of the beauty year. The brands that accept this shift and design for it—front-loading inventory, creating content arcs that stretch across seasons, and balancing exclusivity with accessibility—will turn what could be a logistical headache into one of the **most powerful acquisition tools in their portfolio**.



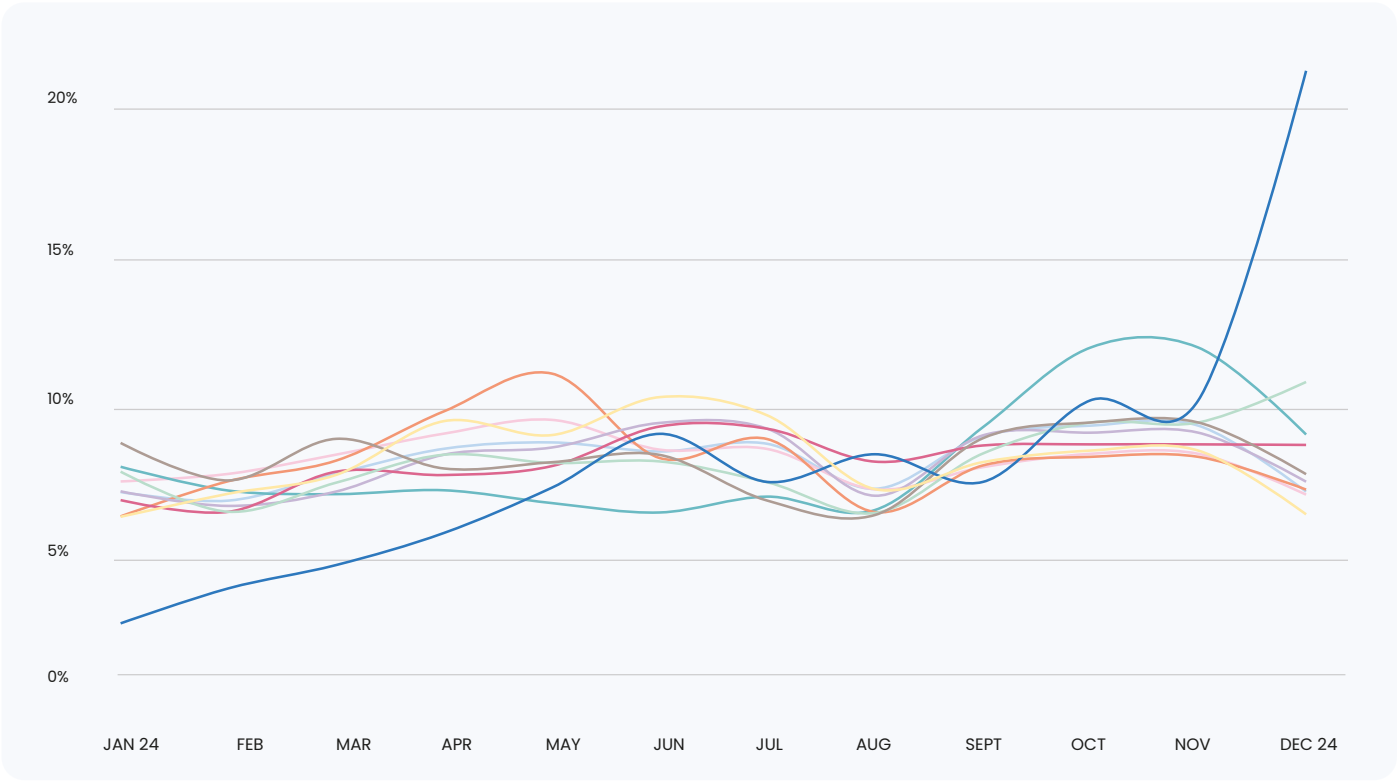
Health & Wellness

Peak season shopping trends



Most purchased Health and Wellness items during the year - 2024 with Scalapay⁽⁴⁾

- Generic Supplements ■ Weightloss products ■ Pharma ■ Proteins ■ Vitamins ■ Probiotics
- Herbal tea & Melatonin ■ Ashwagandha ■ Omega ■ Vitamin D



(4) SCALAPAY INTERNAL DATA, 2025



Wellness economy in 2025

The wellness and fitness economy in Europe is entering 2025 with renewed momentum. According to NielsenIQ⁽¹¹⁾, 70 percent of global consumers now describe themselves as proactive in managing their health, and more than half are willing to spend over \$100 a month on nutrition, self-care and fitness. In Europe specifically, the sector is projected to reach €14.3 billion by the end of the year, buoyed by **hybrid models that combine physical and digital offerings**.

The Rise of Quantified Wellness

Black Friday baskets no longer stop at TVs and sneakers. Increasingly, they include **Oura rings, Apple Watches, Whoop bands**, and subscription supplements, the tools of a new quantified wellness culture. What was once a niche of biohackers has become mainstream shopping behavior, particularly in the lead-up to New Year’s resolutions, when consumers buy devices and programs that promise to reset health along with the calendar. This quantified archetype **didn’t appear overnight**. Wellness, long coded as soft, feminine, and ritualistic, was once a space men largely ignored. The industry reframed it as performance: meditation became **“cognitive enhancement,”** ice baths turned into resilience training, self-care was rebranded as **“life hacking.”**

For health and wellness retailers, the Black Friday moment is pivotal. Wearables and wellness tech are among the best-performing categories during peak season, when shoppers justify high-ticket purchases as investments in their future selves.

Trust, labels and the new consumer mindset

Parallel to the rise of quantified wellness is a deepening skepticism. According to **NIQ’s Global State of Health & Wellness 2025 report⁽¹¹⁾**, 82 percent of consumers believe product labels should be clearer and more transparent. This mistrust didn’t emerge in a vacuum. Social media has fuelled polarisation between what many call the “Perfectionists”–who demand purity at any cost–and the “Dismissers,” who dismiss all caution as fearmongering. Between these poles, consumers are left to navigate a sea of misinformation, greenwashing and exaggerated claims. Brands that **overplay “clean” narratives** without scientific grounding risk alienation, while those that underplay safety and responsibility appear tone-deaf.



The path forward is not grand marketing gestures but **radical transparency**: publishing responsible AI policies when using generative tools, disclosing ingredient sourcing, clarifying the difference between claims and proven benefits. The winners will be those who treat **honesty as an asset, not a compliance exercise**.

Supplements: From Niche Trend to Cultural Signal

Collagen, ashwagandha, mushroom powders – once the preserve of health food stores – **are now part of Europe’s digital wellness conversation**. Searches and social chatter suggest that a growing slice of consumers are experimenting with supplements less out of medical necessity and more as **lifestyle tools**. Collagen leads the pack as a beauty-adjacent ritual, while adaptogens and functional mushrooms are positioned as stress- and sleep-management aids. Discovery, however, has shifted dramatically. TikTok and Instagram are not just amplifiers **but the very starting point of awareness**. Wellness supplements increasingly enter consumers’ lives through short-form videos, influencer testimonials and algorithm-fed routines rather than pharmacies or supermarkets. This creates both opportunity and risk: the visibility is vast, but so is the skepticism. Most consumers acknowledge that supplements feel overhyped, **and credibility only grows when claims are paired with science**.

The Weight of Appetite: GLP-1 and its effect cross-category

The rapid adoption of GLP-1 weight-loss drugs like Ozempic and Wegovy is not only reshaping healthcare, **it is also changing the way consumers relate to food, scent and beauty**. Market research firm **Mintel** has linked the boom in gourmand fragrances (+24% of product launches in the past year) such as vanilla, caramel, coffee-to appetite suppression. With food less central to daily reward systems, **scent becomes a proxy indulgence**. In parallel, rapid weight loss brings new aesthetic challenges. The so-called **“Ozempic face”**, marked by loss of skin firmness, more visible lines, and a duller complexion, has already become a mainstream topic. Mintel notes **a sharp acceleration in “collagen-boosting”** formulations and plumping claims, still niche today but growing rapidly.

This intersection of pharmaceuticals, food and beauty underscores a broader truth: **wellness choices create ripple effects across adjacent categories, reshaping entire consumer ecosystems**.

The Rise of Fiber

For a decade, protein has dominated the nutrition spotlight, featured everywhere from breakfast cereals to bottled waters. The landscape, however, is shifting. On TikTok, the **“fibermaxxing” trend**, where creators share colorful, high-fiber recipes and hacks, is reframing fiber from an unglamorous necessity into a lifestyle symbol. Unlike protein, which conveys strength and recovery, **fiber represents balance, gut health, and blood sugar stability**, all benefits that resonate strongly with a wellness model focused not only on aesthetics but also on long-term health. Fiber is now poised to enter **mainstream categories** such as breakfast foods, snacks, and functional beverages, supported by messaging around satiety, microbiome health, and healthy aging. Just as **“high protein”** became shorthand for vitality, **“high fiber”** may soon emerge as the next label claim consumers actively seek.

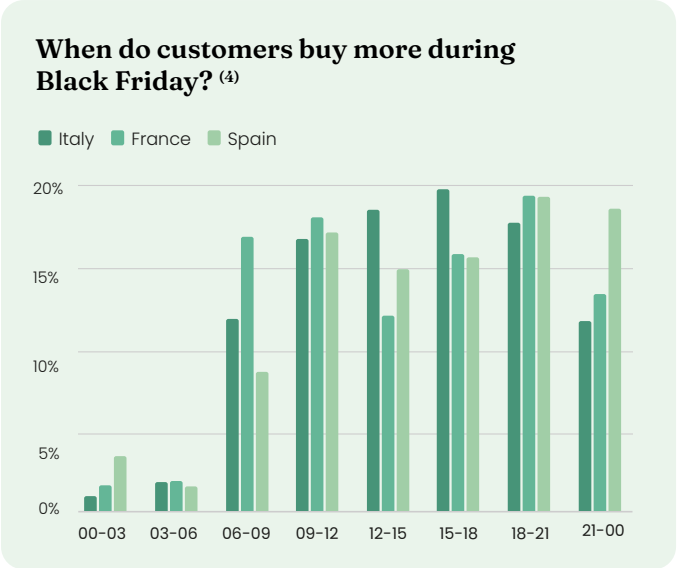
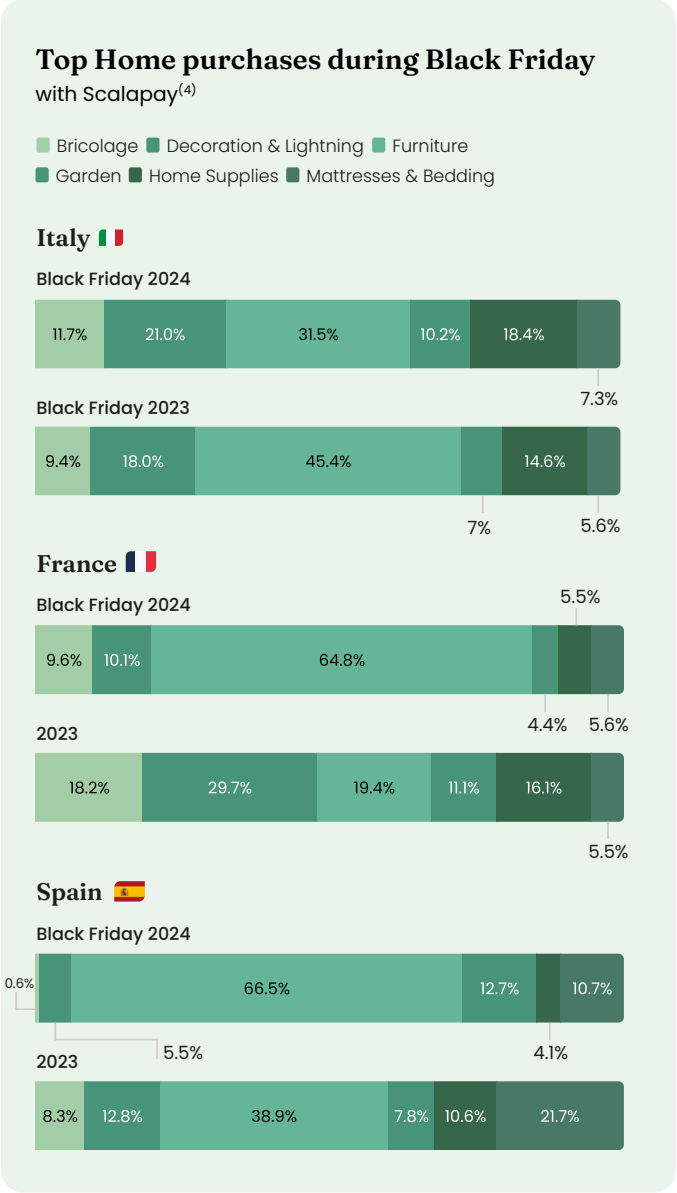
Searches and social chatter suggest that a growing slice of consumers, particularly women, are experimenting with supplements less out of medical necessity than as lifestyle tools.



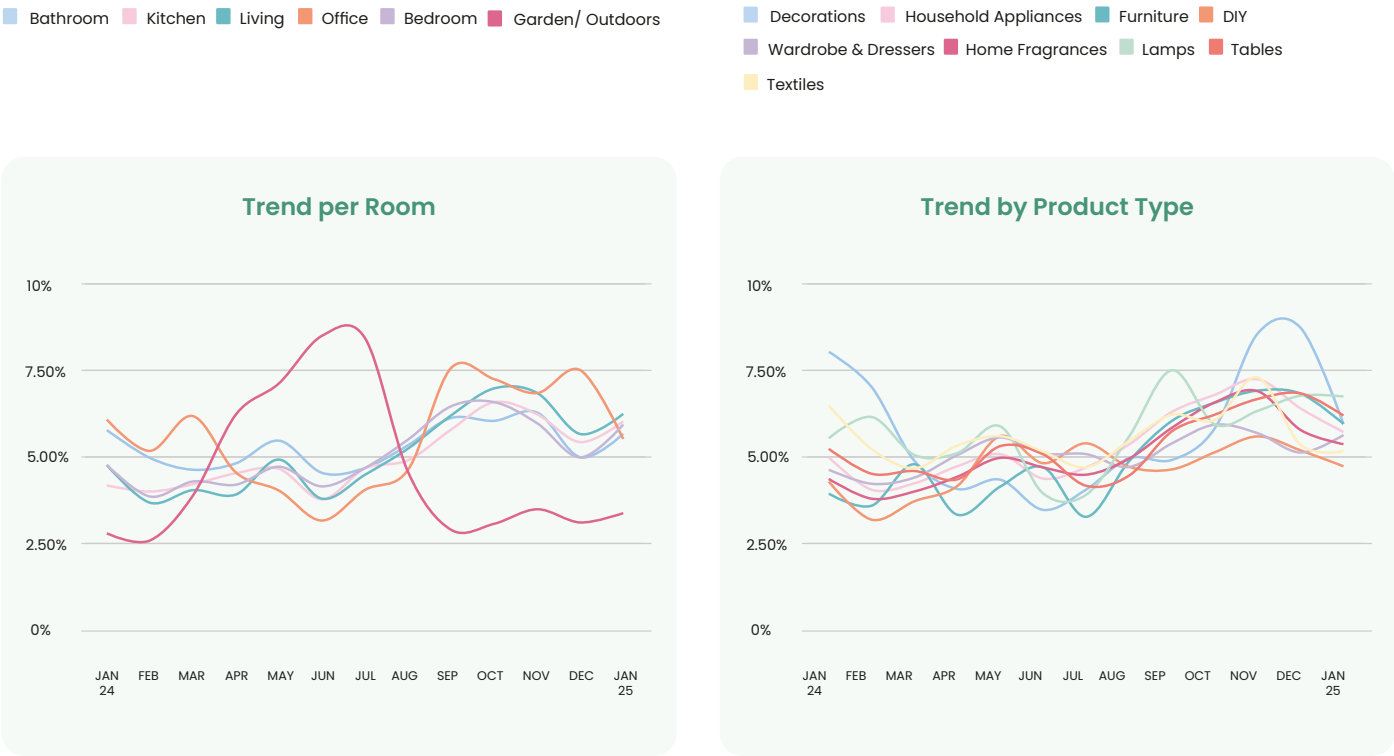
(11) NIQ’S GLOBAL STATE OF HEALTH & WELLNESS 2025 REPORT

Home & Garden

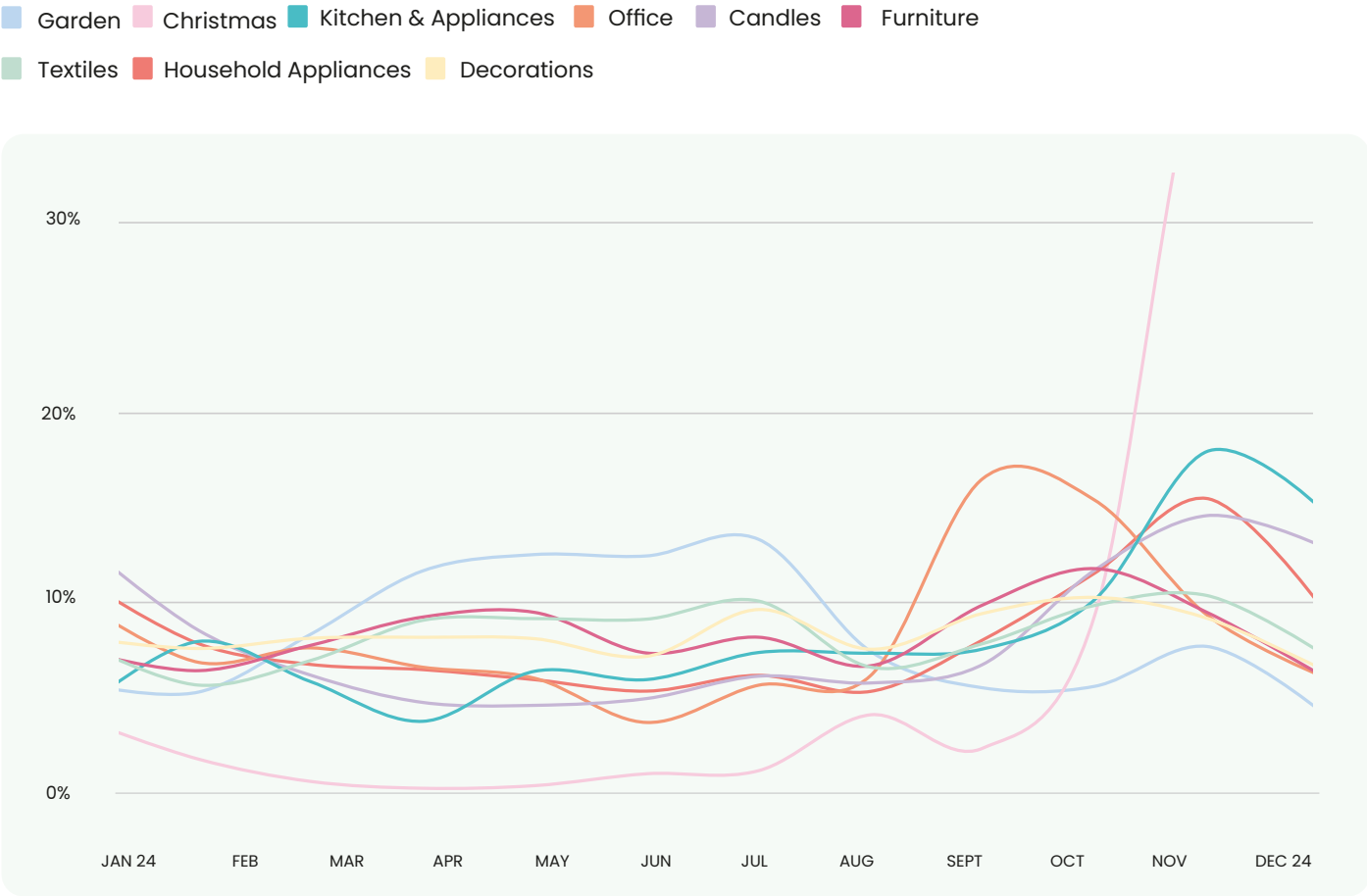
Peak season shopping trends



Most popular Home products searched items during the year - 2024/2025 on Scalapay⁽⁴⁾



Most purchases Home products during the year - 2024 with Scalapay⁽⁴⁾



⁽⁴⁾ SCALAPAY INTERNAL DATA, 2025

The season when “home” gets practical again

Across Europe, the home improvement market is trending **toward stable, practical growth**. The European DIY market is projected to add approximately \$33 billion between 2025 and 2029, growing at a steady 3.2% CAGR—a sign that investment in home upgrades remains solid and considered.⁽¹²⁾ In this context, **Black Friday has evolved**: shoppers lean into purchases grounded in real-life utility: think durable small appliances, multi-functional tools, and cozy furniture that turns everyday living spaces into sanctuaries.

Countertop economics and the rise of the “small big ticket”

Kitchens still convert. Coffee culture anchors the category because it straddles luxury and everyday ritual. Premium machines typically headline doorbusters and draw traffic that spills into **blenders, air fryers and pizza ovens**. In 2025 previews, brands known for barista-grade gear are again flagged for meaningful markdowns across key models, a reliable playbook that pairs basket-building accessories with a hero item. The same gravity applies to vacuums and steam mops, where shoppers are trained to expect **deep cuts from late November into Cyber Monday**.

Consumers want fewer, **better appliances that earn their counter space**. Retailers who package long warranties, easy replacement parts and clear comparison content alongside the price win the tie when products look similar in feed.



Shoppers lean into purchases grounded in real-life utility: think durable small appliances, multi-functional tools, and cozy furniture that turns everyday living spaces into sanctuaries

The garden that refuses to hibernate

“Outdoor” is no longer a summer SKU. The fastest-growing story in garden is winterising the good life: smokeless fire pits that double as grills, compact pizza ovens, weather-proof textiles, and modular pergolas that can be screened and lit for cold-weather use.

These products extend the square footage you actually live in, which feels **like a smart buy during a season of scrutiny and tight budgets**.

Rooms that shop themselves

Generative AI has moved from curiosity to cart. Two patterns matter for home and garden this Black Friday. First, shoppers increasingly design before they buy. Tools that let them upload a photo of their room, re-render it in a style and click straight into a bundle compress the discovery-to-purchase gap. Wayfair’s Decorify and its newer Muse engine were built to do precisely that, producing shoppable, photorealistic room looks.

Second, retailers with robust planners, from 3D kitchen to whole-home layout, **are quietly turning planning traffic into promotional lift** when discounts go live. If the room is already saved, a price drop becomes a trigger, not a debate .

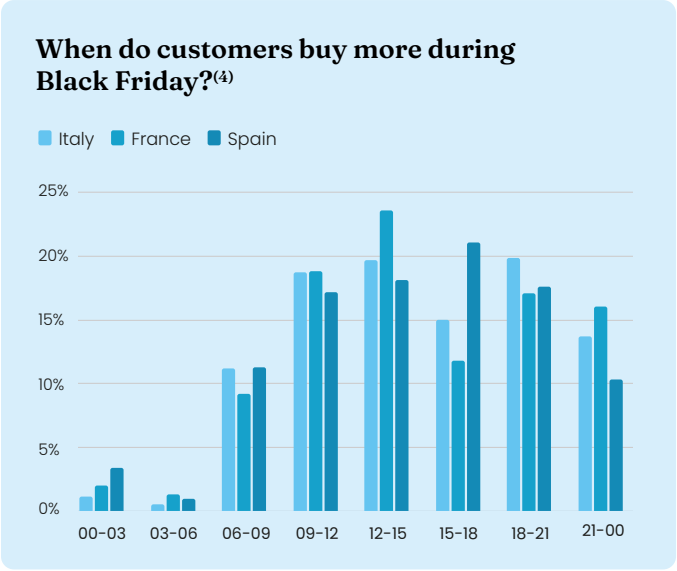
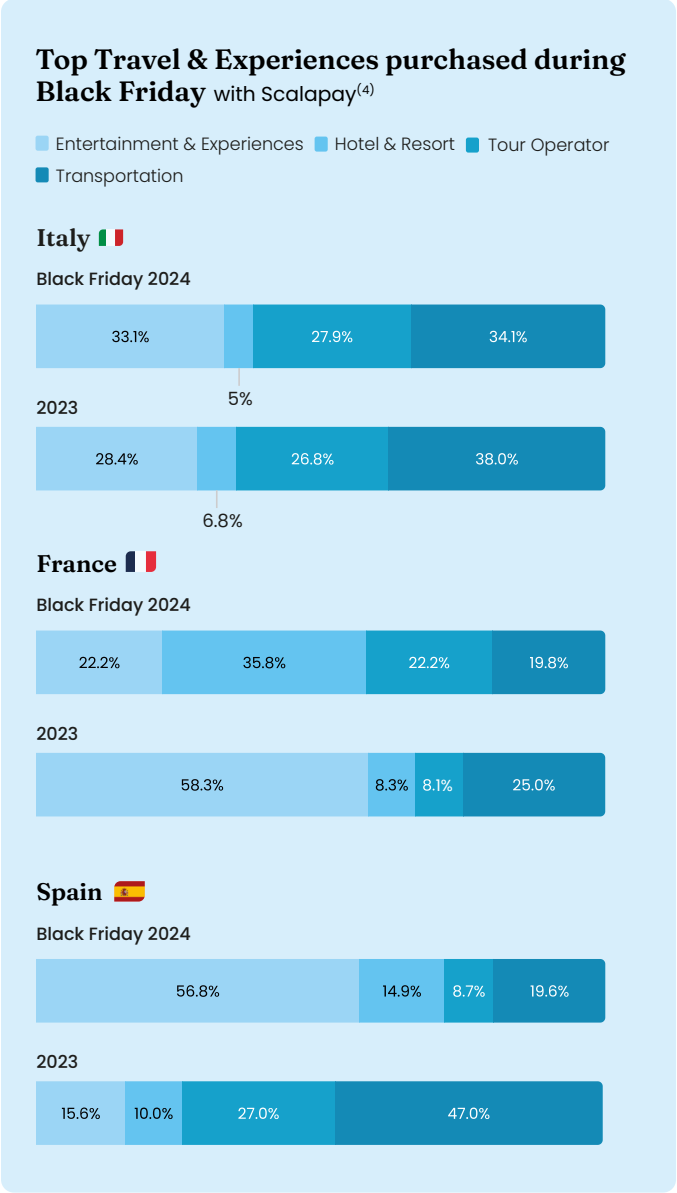
The feed inspires, **the model personalises, and the cart assembles itself**. The winners will align promotions to the moment a customer sees their space “after,” not just to the day a banner goes up.



(12) DIY HOME IMPROVEMENT MARKET IN EUROPE, TECHNAVIO, 2025

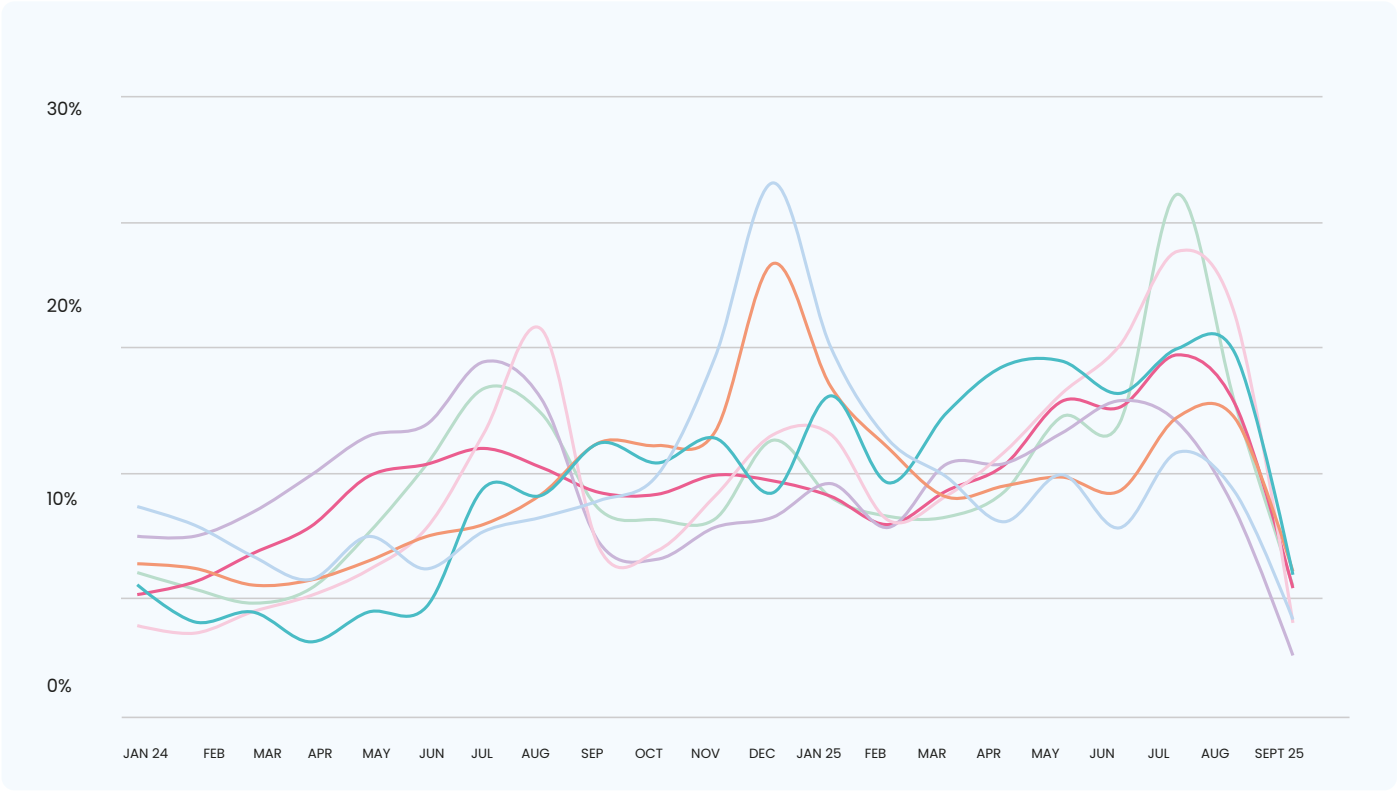
Travel & Experiences

Peak season shopping trends



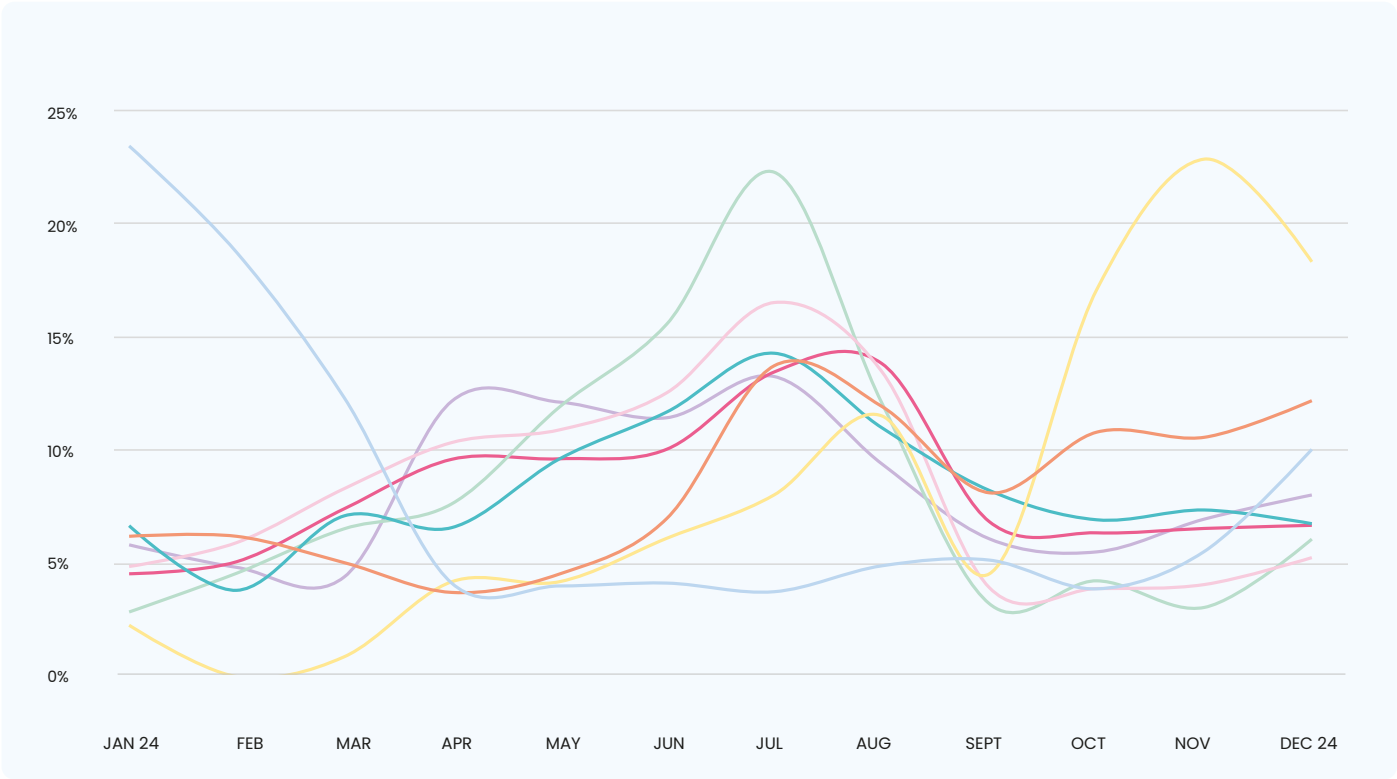
Most searched travel products during the year - 2024/2025 on Scalapay ⁽⁴⁾

■ Winter Sports ■ Hotel & Accomodations ■ Flights ■ Spas ■ Generic travel ■ Transportation ■ Experiences



Most purchased travel products during the year - 2024 with Scalapay ⁽⁴⁾

■ Winter Destinations ■ Hotel & Accomodations ■ Cruises ■ Spas ■ Generic travel ■ Transportation ■ Experiences ■ Travel packages and gift boxes



(4) SCALAPAY INTERNAL DATA, 2025



The season resets around value, not volume

Households are still traveling, but they are doing the math differently. **ETC study shows 77%⁽¹³⁾** of Europeans planned to travel between June and November 2025, highlighting strong demand despite economic uncertainty. People will still go see family, still book a restorative long weekend, still set a budget for one special trip, yet the purchase is weighed against **a higher cost of living** and the demand **for meaningful experiences**.

Overtourism goes mainstream and pushes the calendar sideways

55% of Europeans⁽¹³⁾ are planning less crowded trips this year and choosing lesser-known destinations, all to avoid places **with too many tourists**. Younger adults show the highest levels of worry and the most openness to policy interventions such as timed entry and limits on short-term rentals.

That sentiment is now visible in booking patterns. Shoulder months are gaining share as travelers chase lower density, softer prices and more authentic encounters. You can see it in the spread of itineraries beyond capitals to small towns, wine routes and nature corridors. You can hear it in the language too. People talk less about **ticking off icons** and more about **having space to breathe**.

One consequence of overtourism awareness is the rise of what tour operators call **town-sizing**. It is not the rejection of big cities so much as a new emphasis on nearby small towns that extend a trip's flavor without the queues. In France, it might be a few nights in Saorge after Nice. In Central Europe, Znojmo becomes a foil to Vienna. In Japan, Tsumago reframes a week that also touches Tokyo and Kyoto.

The logic is simple. Travelers who have already seen the headline destinations want depth, not just distance. For local economies, this is an opportunity to share the dividend of visitor spend more widely. For travelers, it is a way to reconcile **value, pace and place in a single itinerary**.

Households are still traveling, but they are doing the math differently. (...). The purchase is weighed against a higher cost of living and the demand for more meaningful experiences.



Skillcations make education the souvenir

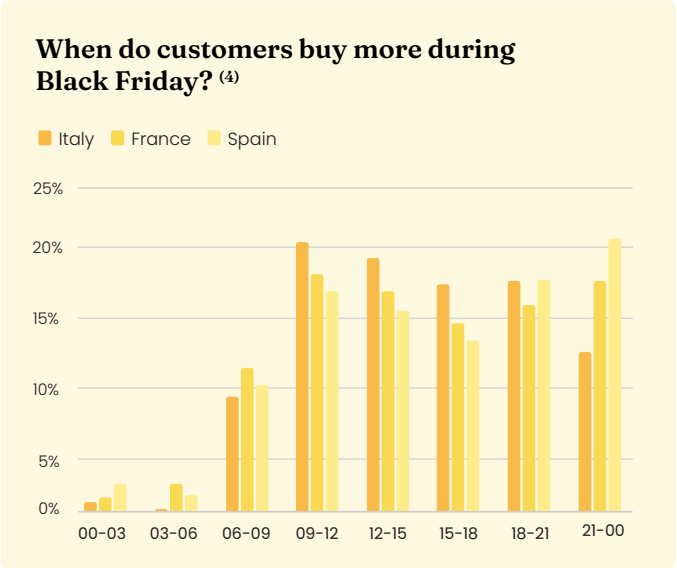
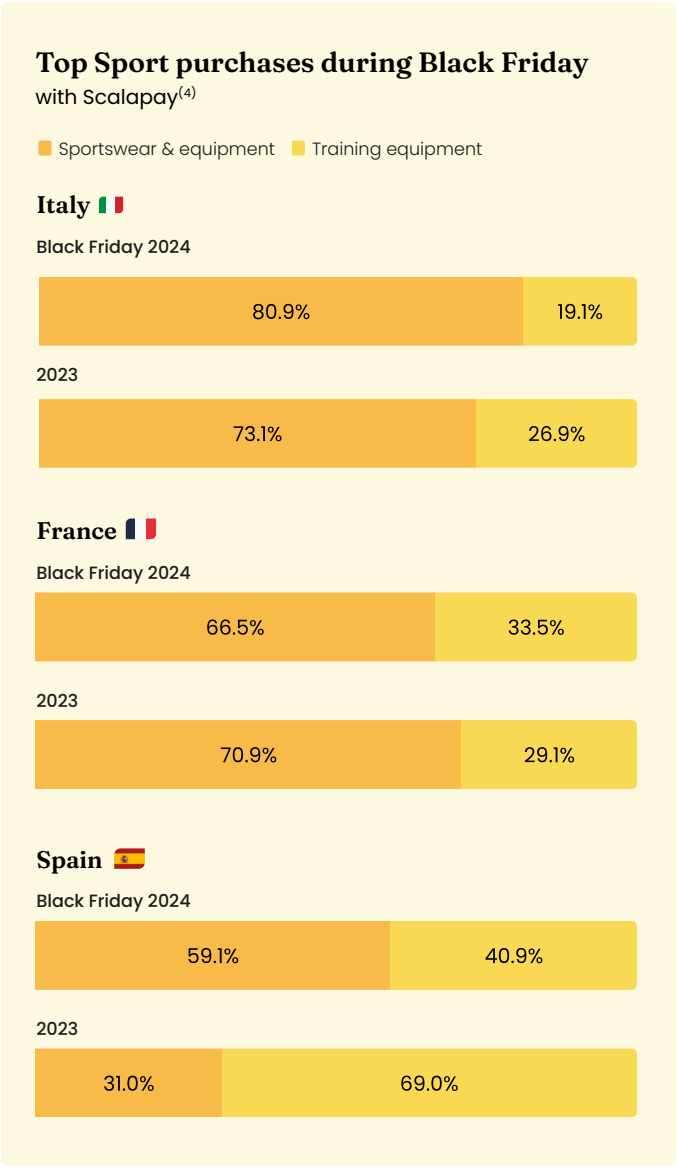
Another trend gaining a lot of relevance is the deliberate **pursuit of learning**. A growing share of Americans say they want to acquire **a skill while on holiday**, and providers are answering with offers that are both niche and serious. Surf coaching with drone video analysis on the Osa Peninsula. PADI certification and coral restoration in the Caribbean. Yoga and cooking embedded in a river itinerary through India, taught in context rather than in a hotel conference room. In a year defined by **selective spending**, these programs justify their ticket by promising to send you home changed. Expect more short, high-intensity formats designed for long weekends between October and February, and a stronger connection between wellness and mastery, as recovery and discipline increasingly share the same schedule.



(13) ETC REPORT ON TRAVEL SENTIMENT TO AND WITHIN EUROPE, 2025

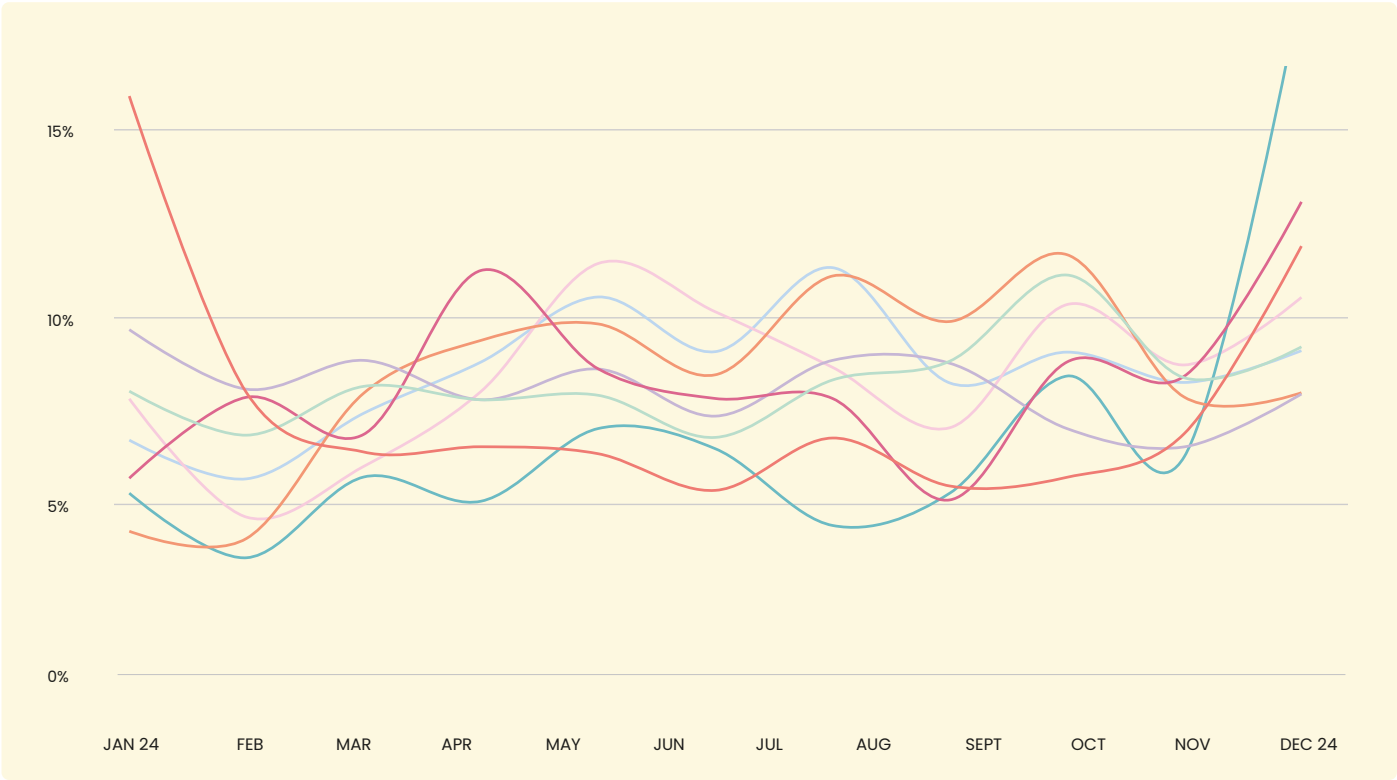
Sports

Peak season shopping trends



Most purchased Sport items during the year - 2024 with Scalapay⁽⁴⁾

- Pre-workout Supplements ■ Proteins ■ Vitamins ■ Tennis, Football, Padel ■ Sport Watch
- Gym Equipment ■ Sports Shoes ■ Winter Sports



(4) SCALAPAY INTERNAL DATA, 2025



Golf Goes Glam

After a rising interest in tennis and padel, **golf has now emerged as an unlikely beneficiary of fitness' stylistic turn.** Once a byword for elitism and exclusion, the sport is being rebranded for a younger, more diverse audience.

Collaborations like Ring Concierge and Malbon Golf's diamond-friendly gloves and charm bracelets show how brands are repositioning the sport as fashionable, social and female-first. The results are striking: the glove sold out in seven minutes, **and TikTok content around golf grew by 54 percent in views in the first half of 2025⁽⁹⁾.**

Golf's growth has been powered not only by participation – women now account for a quarter of players and 60% of post-pandemic growth – but also by the cultural cachet of documenting the sport online. What was once your father's pastime is now an influencer's aesthetic, and the commercial implications for fashion, jewellery and fitness brands are profound.

Once a byword for elitism and exclusion, the sport is being rebranded for a younger, more diverse audience.

The Boutique Boom

If golf is being reimagined through collaborations and content, the fitness industry more broadly is being reshaped **by boutique gyms.** These spaces, often smaller and more specialised than traditional clubs, have become the heartbeat of the sector. Their appeal lies in **community**, identity and curated experiences that extend beyond the workout itself.

The European Fitness Trends report⁽¹⁴⁾ highlights that gyms with strong community engagement enjoy retention rates up to **75% higher than those without.** This is not incidental: in a world where consumers demand connection as much as calories burned, boutique studios deliver belonging alongside training.

From yoga collectives to strength-training clubs that double as social hubs, the rise of boutique fitness reflects the same forces driving golf's revival – the merging of sport, lifestyle and culture into a holistic definition of wellness.



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