



Black Friday 2024

Global Trends and Regional Highlights





Introduction

As Black Friday 2024 wraps up, we're taking a closer look at the key trends, consumer behaviour shifts, and regional performances that defined this year's retail extravaganza.

Through our data, we've unearthed prominent trends in both browsing and conversions, with year-on-year (YoY) comparisons highlighting the evolution in consumer spending. From a surge in mobile shopping, to delayed promotional strategies, and emerging verticals, we've gathered insights to help guide future strategies.

In the report...

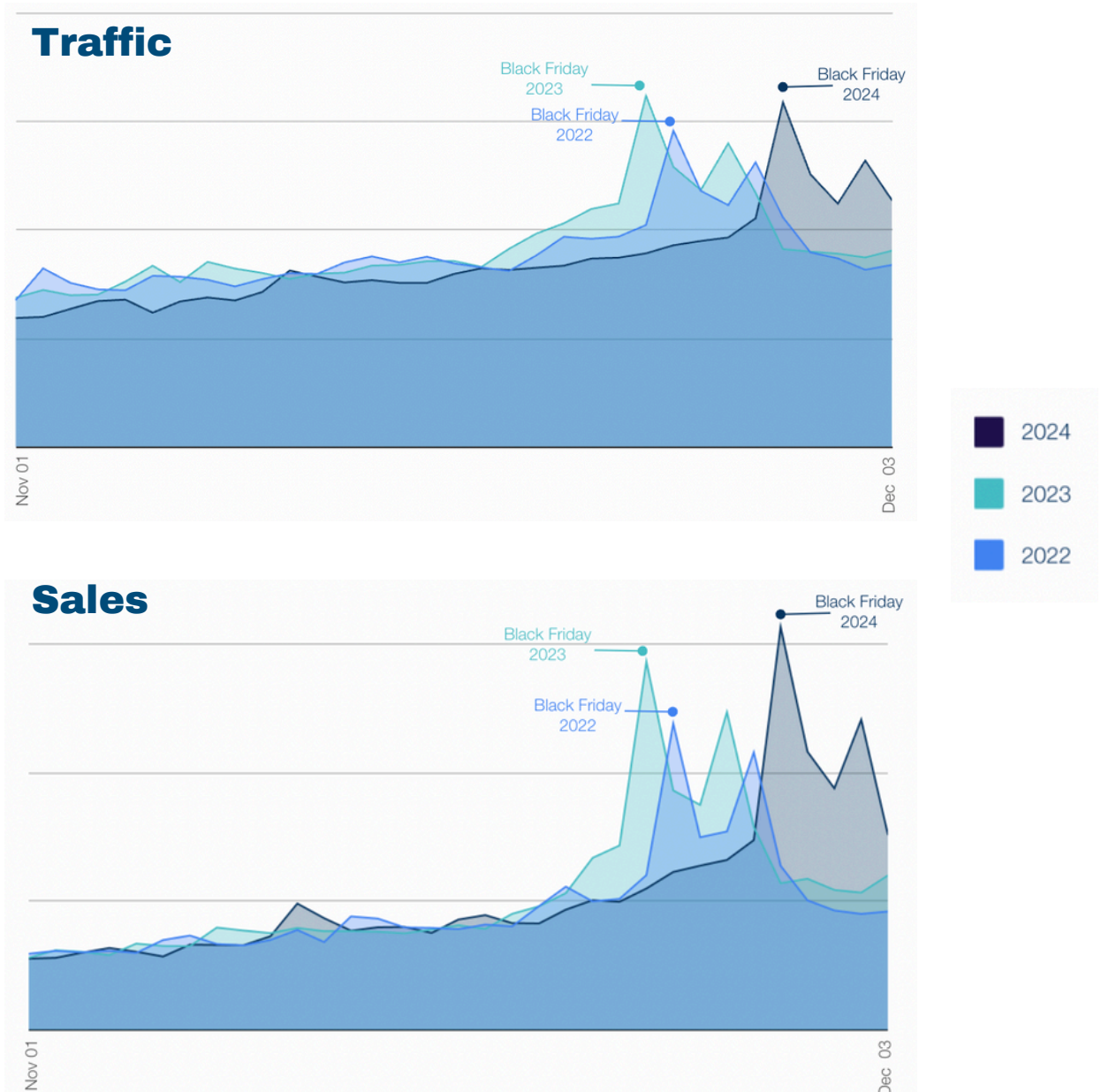
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Global Overview

Strategic purchases in light of rising costs of living

In 2024, browsing declined while sales saw an uptick. On Black Friday itself, clicks were down by 2%, and for the month of November, clicks dropped by 8%, marking the lowest point since 2019. Overall in November performance was down approximately -15% YoY, yet on **Black Friday weekend sales experienced a 9% increase YoY**. Consumers seem to have moved away from mindlessly browsing through countless deals, instead adopting a more strategic approach to their purchases. This year, shoppers appeared more deliberate, knowing what they wanted to buy and holding out for the best deals during the Cyber 5 weekend.

YoY Trends

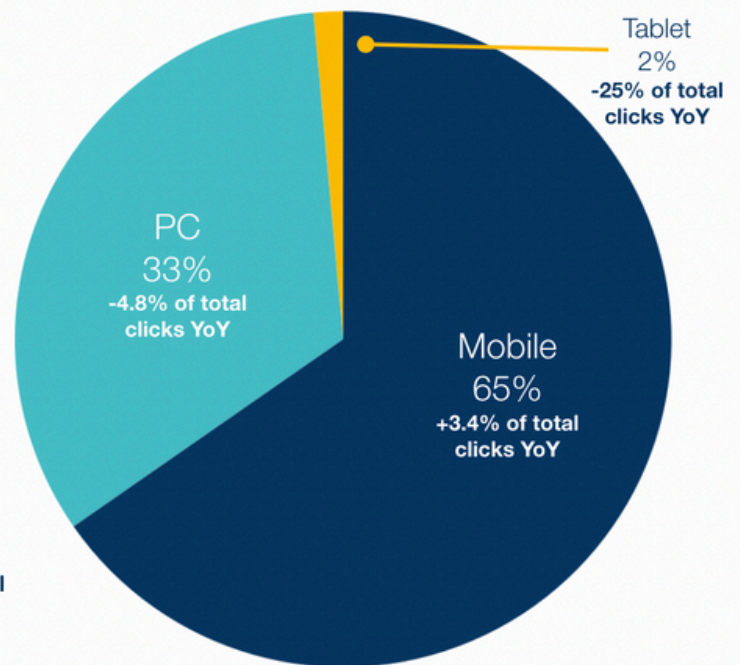


Global Overview

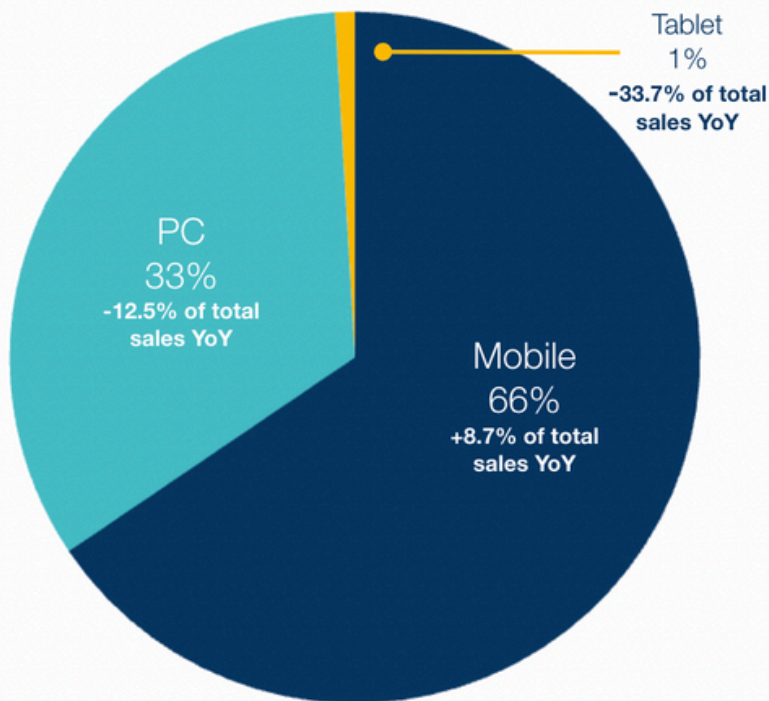
M-Commerce reigns supreme

The data underscores the growing dominance of mobile in both browsing and purchasing. Mobile now accounts for the majority of sales and clicks, reflecting a clear shift toward m-commerce as consumers increasingly turn to smartphones for both research and transactions. Meanwhile, PC and tablet usage continues to decline, indicating that **mobile-first shopping experiences are becoming the norm.**

2024 Clicks



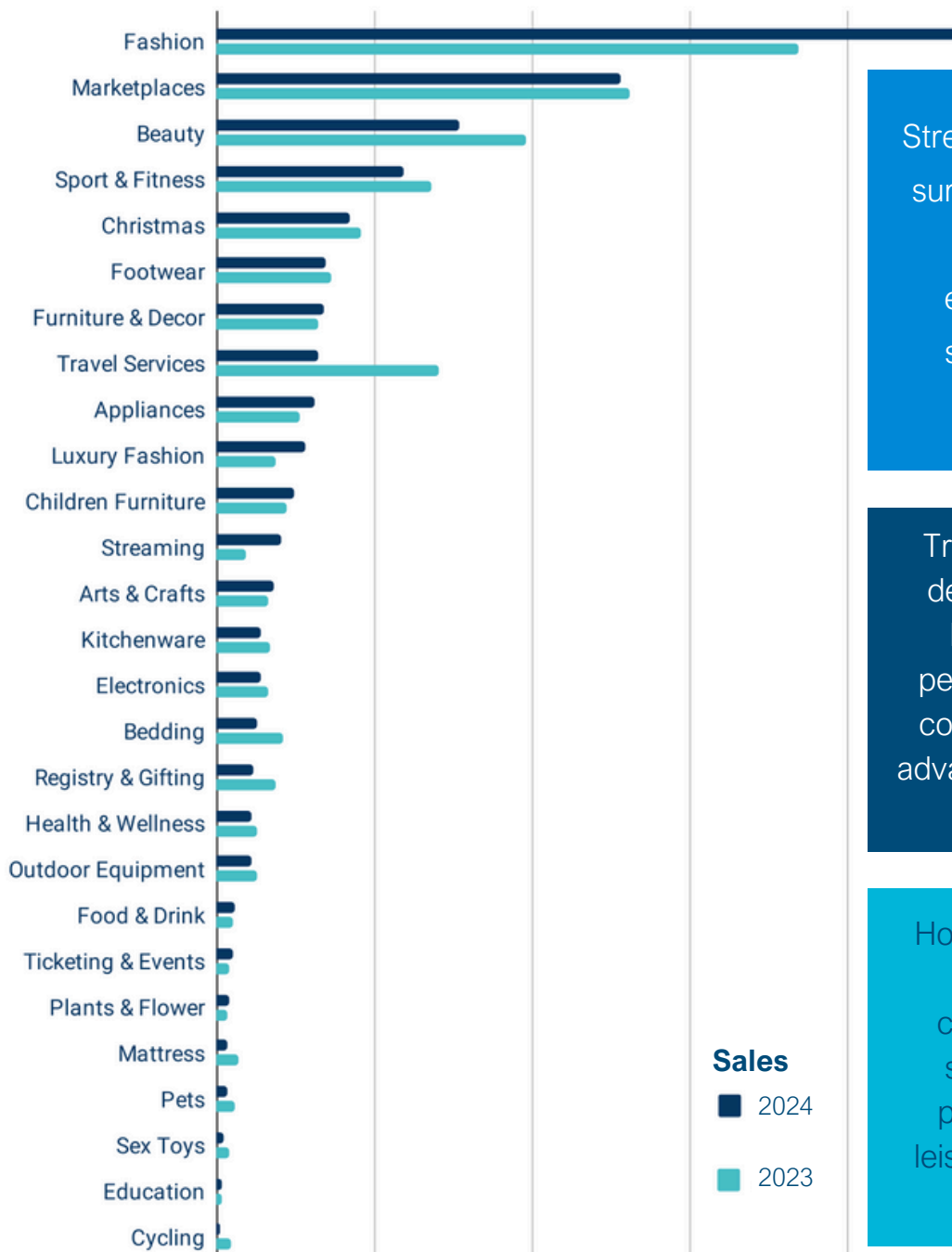
2024 Sales



Global Overview

Vertical performance broken down by sales

Fashion continues to dominate as the top-performing vertical during Cyber 5, with sales up 28% YoY, and notably Luxury Fashion seeing an impressive 50% increase.



Streaming also saw a significant surge, up 115% from 2023, as Black Friday promotions expand beyond traditional sectors into industries like entertainment.

Travel experienced a notable decline, down 44%, which is largely due to the vertical performing well year round so consumers had already taken advantage of incentives earlier in the year.

However, Ticketing and Events saw a 28% increase, as consumers are still eager to spend on experiences, but prioritise local or accessible leisure activities as we come to year-end.

US Insights

Holiday shopping in the US is starting earlier each year, marked by major tentpoles and shopping events in October, and this year was no exception. Early retailer promotions coupled with the 2024 US presidential election and fewer shopping days after a late Thanksgiving meant timing took on greater importance this holiday season.



Despite the earlier start, **Cyber Week remained the focal point of the Q4 shopping period.** US Managed Publishers saw a slight 2% decline in clicks YoY but experienced strong growth in key metrics, including order value (+6% YoY), commission (+8% YoY), sales (+11% YoY), and EPC (+11% YoY). The enduring popularity of Cyber Week highlights US consumers' inclination to strategically plan their holiday shopping to coincide with the steepest retailer discounts.

Across the Skimlinks network, **articles featuring general roundups of top deals to shop throughout the weekend along with highly-specific content around focused merchant promotions generated the greatest publisher commission.** Best-selling products ranged from household essentials like mattresses and vacuum cleaners to luxury handbags, matching loungewear sets, and cozy slippers. Other seasonal favourites, like high-end artificial Christmas trees, also performed well. New standout merchants included beauty brand Omniulux, durable workwear company Carhartt, and PacSun.

Traditionally top-performing categories including Clothing & Accessories, Beauty, Christmas products and Sport & Fitness continued to lead in terms of order value during Cyber Week, while as reflected globally, the Luxury Fashion and Ticketing & Events categories saw the most significant year-over-year order value growth.

UK Insights

The UK saw some intriguing shifts in consumer behaviour during Cyber Week 2024. While Fashion experienced a solid 22% YoY uplift in sales, it was **Marketplaces that led the charge** with a 26% increase in sales. Consumer's preference for the **convenience of shopping on platforms that offer a wide variety of brands and products** in one place continues to grow.



Home decor emerged as a standout category, with sales up 84% and order value soaring by 148%, signalling that there were more UK investing in their home furnishings and they spending more than before during the sales period. Comparable to the rest of 2024, this was a significant uptick suggesting that many shoppers may have intentionally delayed household purchases to coincide with holiday discounts.

Top products during the season included **jewellery, scarves, perfume, jumpers, as well as all things Christmas-related**. Christmas-related products performed exceptionally well, with sales up 117%, order value increasing by 205%, and commissions generated by publishers rising by 75%.

Evergreen content proved to be a key driver of traffic and commission for UK publishers, as consumers returned to trusted, established guides and roundups for their Black Friday shopping decisions. This trend highlights the importance of content that provides solid recommendations and showcases the best promotions.

While the big retail giants continued to dominate traffic and conversions, several standout brands also saw impressive growth this Cyber Weekend, marking them as ones to watch moving forward. Notably **jewellery merchants, including SWAROVSKI, Monica Vinader, and Pandora**, saw uplifts reflective of the vertical's success.

FR & DE Insights



As predicted, and in line with last year, both France and Germany saw their peak sales on Black Friday itself, with the majority of purchases taking place on the 29th.

Germany

In Germany, traffic surged by 35%, sales increased by 47%, and order value also saw a significant uplift of 64% YoY. This signifies Black Friday becoming more widely adopted by the commerce industry across Western Europe and that consumers are increasingly spending throughout Cyber Week in these markets.



France

In France, while traffic was slightly down by 0.7%, sales rose by a remarkable 135%. This sharp contrast indicates that while browsing may have slowed slightly, consumers were purchasing much more than in previous years. Order value also increased by 183% YoY, reflecting a trend toward higher-value purchases.

As with most markets globally, clothing was the top-performing vertical in both France and Germany. In France, we also saw notable growth in Electronics, Sex Toys, and Sports & Fitness, while in Germany, Health & Wellness, Cycling, and Luxury Fashion experienced substantial increases in both sales and order value YoY.

In terms of browsing behaviour, the majority of traffic in France came from mobile devices, whereas in Germany, there was a nearly equal split between mobile and PC. However, when it came to converting, **mobile devices remained the primary driver of purchases in both countries.**

Looking ahead, the significant increases in order values across both countries suggest that Black Friday is no longer just a one-day event but an integral part of the broader holiday shopping season. Whilst sales remained primarily concentrated to Black Friday, unlike last year, 2024 saw extended shopping periods and a broader participation of brands, signalling that wider adoption of the Black Friday phenomenon is well underway in both France and Germany.

Australia Insights

The Black Friday and Cyber Monday period was a key moment in Australia once again this year, with the event now stretching over the month of November and growing to encompass holiday gifting, on top of traditional discounting from retailers. Traffic (+60%), order value (+51%) and sales (+37%) all grew significantly year-over-year between the peak sales period of 24 November to 2 December



Early and Extended Sales Periods

Brands began promotions earlier than ever before and extended them beyond the traditional four-day event. Blending Black Friday into Cyber Monday across the weekend, with shopping opportunities also available before and afterwards, allowing consumers more time to shop and take early advantage as discounts became available. It also reflects brands' desire to maintain shopper attention over a longer period and stand out from the clutter of the main event.

Trending Verticals

Home Appliances saw uplifts in sales (+40%) and order value (+52%). Consumers embraced Black Friday sales of high-priced appliances and electronics, as leading brands doubled-down on deals for TVs, vacuums, fans, hair tools, coffee machines and air fryers. **Decor and bedding, specifically mattresses,** was another big winner during Black Friday (+115% sales), with a big upsurge as people made purchases focused on their homes.

Sex sells! **Adult Toys saw increases in sales (+26%) and order value (+66%).** In particular, adult-only advent calendars are among the best-selling and highest-rated items, offering great value and attracting many Australians.

On top of these standout verticals, deal round-ups, specific brand deals and category-specific offers helped Australian consumers navigate the vast array of deals and make better informed purchases during the shopping period.

HK, TW & JP Insights

Hong Kong & Taiwan

Black Friday was a significant success in **Hong Kong and Taiwan** this year, with YoY uplifts indicating increased consumer engagement and profitability for merchants and publishers. Between 24 November and 2 December, there were notable increases of +50% in clicks, +24% in order value, and +6% in sales.

Personalisation and Niche Interests

Attention to niche markets such as “eco-friendly products”, “customised jewellery”, and “specialty beauty products” reflects a trend towards personalisation. Growth in content around “home fitness”, “wellness retreats”, and “personal care gadgets” shows an increased focus on holistic lifestyle improvements.

Trending Verticals

Travel witnessed noteworthy YoY upticks in various metrics with sales (+76%) and order value (+43%). Notably, consumers eagerly anticipated doubled-down Black Friday sales of outbound travel packages for Japan, not only Tokyo, but also Osaka and Fukuoka. Consumers were also seeking local experiences, with many articles on buffet deals, hotel dining promotions, and discounts on local attractions and entertainment venues.

These trends were complemented by articles about comprehensive deals round-ups, brand deals, category-specific offers, and product recommendations, helping Hong Kong and Taiwan consumers to find detailed information to navigate the vast array of deals, and publishers are catering to this need by offering specialised guides.



Japan

Black Friday is gaining its traction among Japanese audiences this year, with YoY uplifts indicating increased consumer engagement and profitability for merchants and publishers. Between 24 November and 2 December, there were notable increases of +143% in publisher commissions, +110% in order value, and +126% in sales. Whilst this is still a novel phenomena in the Japanese market, we are beginning to witness some adoption of the promotional frenzy.



Let's wrap up

As the dust settles on Black Friday 2024, it's clear that the shopping phenomenon continues to evolve across key global markets. While the core focus of the event remains on steep discounts and consumer-driven sales, trends are shifting towards longer shopping periods and broader brand participation, especially in markets like France and Germany. It is evident that Christmas gifting is now a solidified component of the Black Friday period, acting as a cornerstone for gift buying across markets.

Mobile shopping continues to dominate, with consumers increasingly making higher-value purchases, reflecting growing confidence in the discounts offered, particularly given rising costs of living. Additionally, the rise of marketplaces underscores the increasing demand for convenience and variety in one shopping destination.

Retailers and publishers should continue to adapt to these evolving behaviours, ensuring that they capitalise on the growing opportunities for extended holiday promotions and tailored content in the lead-up to and during Cyber Week.



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