

Quantum Metric

PEAK BENCHMARK 2025

How AI and loyalty are reshaping consumer behavior.

Consumers will still spend this holiday season. The difference is in how and why, as consumers lean towards more personalized offers, practical value, and AI-driven recommendations.



Our survey of **1,600 US and UK** consumers, combined with anonymized, aggregated data from Quantum Metric, uncovered peak isn't about a weekend; it's about building loyalty all year.

Holiday shopping no longer hinges on urgency.

45%

of consumers have already started their holiday shopping (up from 28% in 2024), and 25% plan to finish before Cyber Five.

15%

took advantage of October holiday sales, showing early promotions aren't driving consumers to shop.

The big takeaway here?

General holidays sales no longer incentivize consumers to make purchases. Instead shoppers are planning purchases when best works for them, attempting to build bigger one-time carts versus impulse buys.



Retailers are feeling the shift:

- Weekly retail site traffic is down **21%** between 2024 and 2025, showing less of a tendency to browse, especially during sale days.
- *Figure 1* shows weekly retail conversion rates (CVR) are also down by **27%** between 2024 and 2025 - bigger carts mean less frequent purchases.

FIGURE 1 - RETAIL WEEKLY CVR: 2024 - 2025

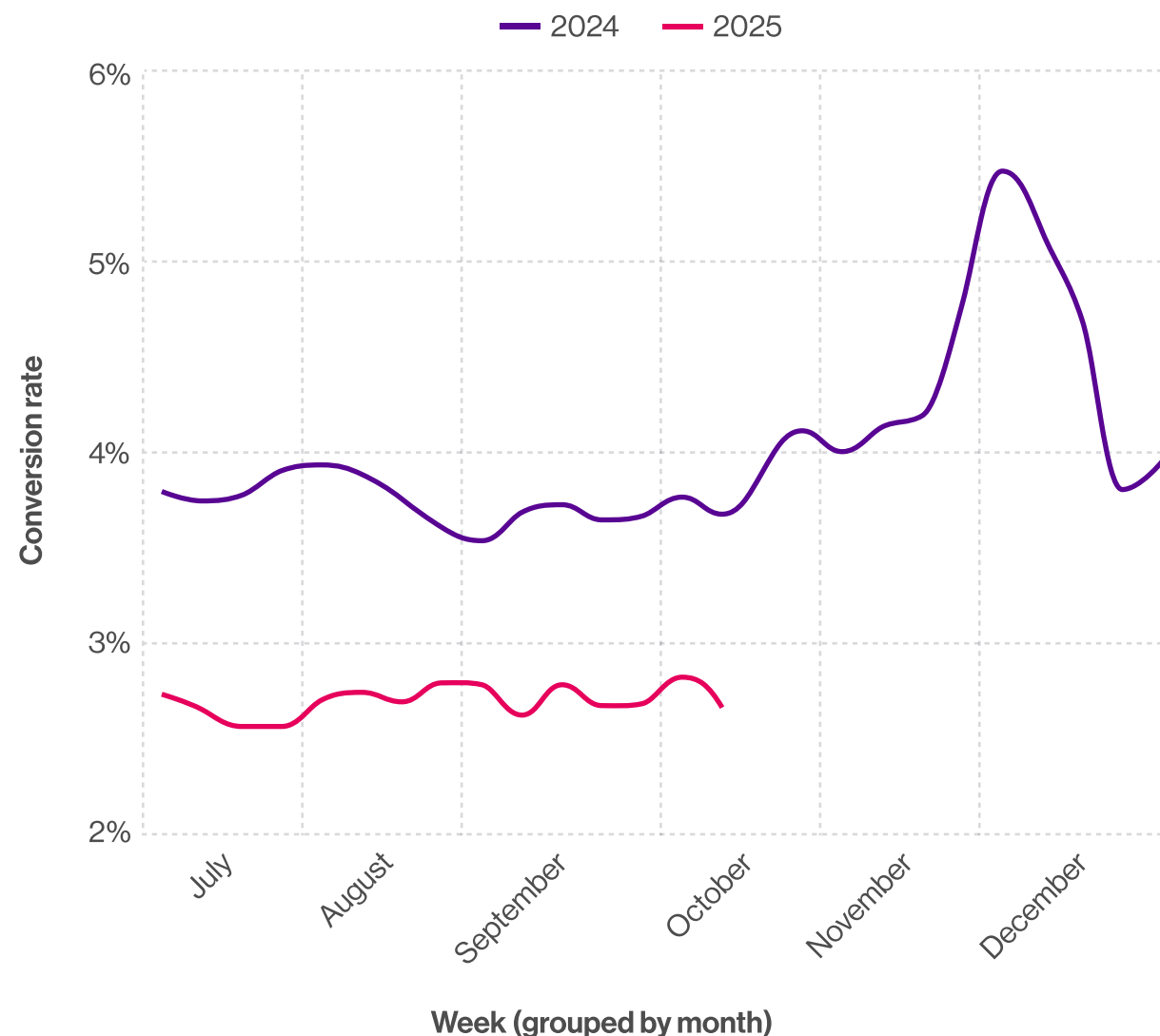
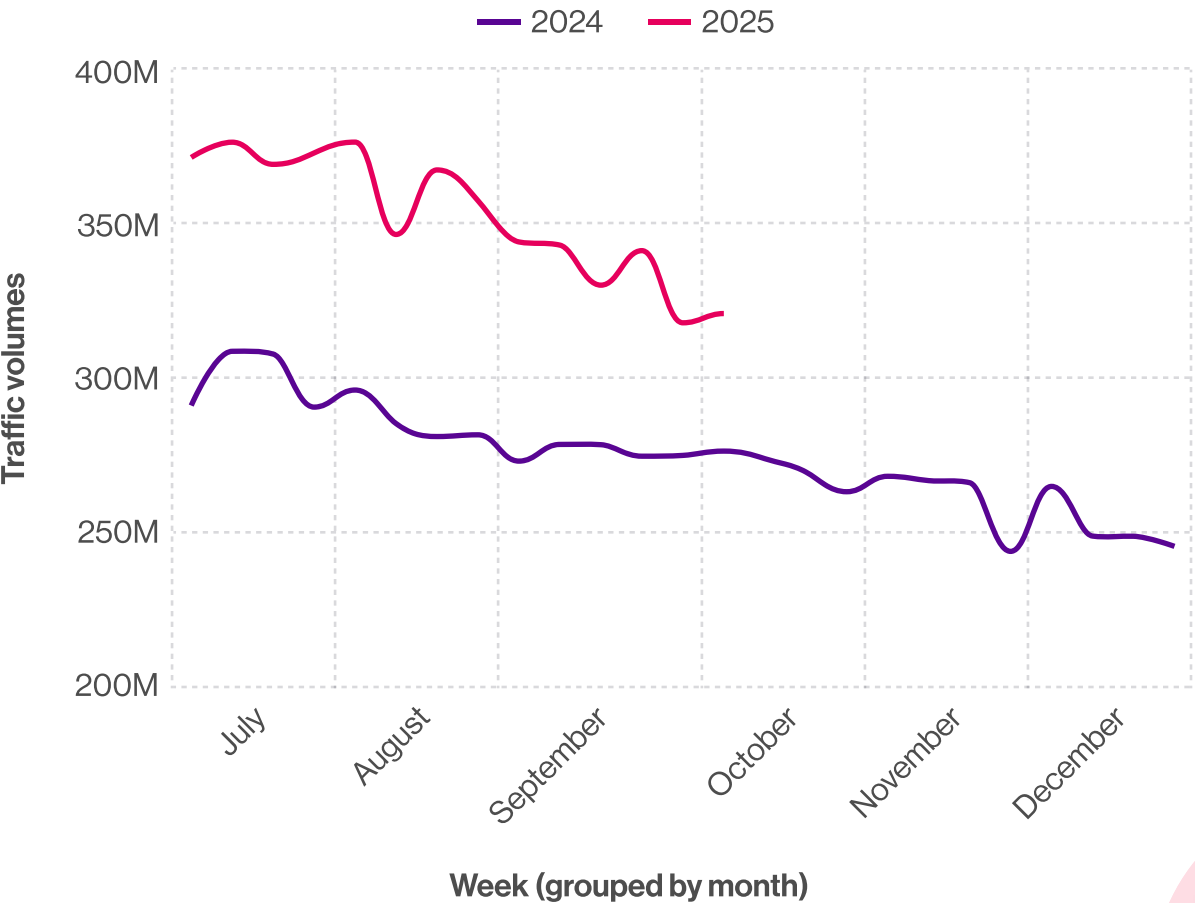


FIGURE 2 - TRAVEL WEEKLY TRAFFIC: 2024 - 2025



Travel brands are seeing the opposite trend, but the same pattern. Consumers are still booking, but want to make sure they get the best offers by spending more time browsing.

- *Figure 2* shows weekly travel site traffic is up **20%** between 2024 and 2025.
- Meanwhile, weekly travel CVR remained flat between 2024 and 2025.

Covered first in our 2024 peak report, we are seeing patterns that show peak is no longer a weekend - it's a mindset. Tailored offers, year-round offers will drive sales and repeat visits.

Consumers want personalization over price.

Are sales dead?

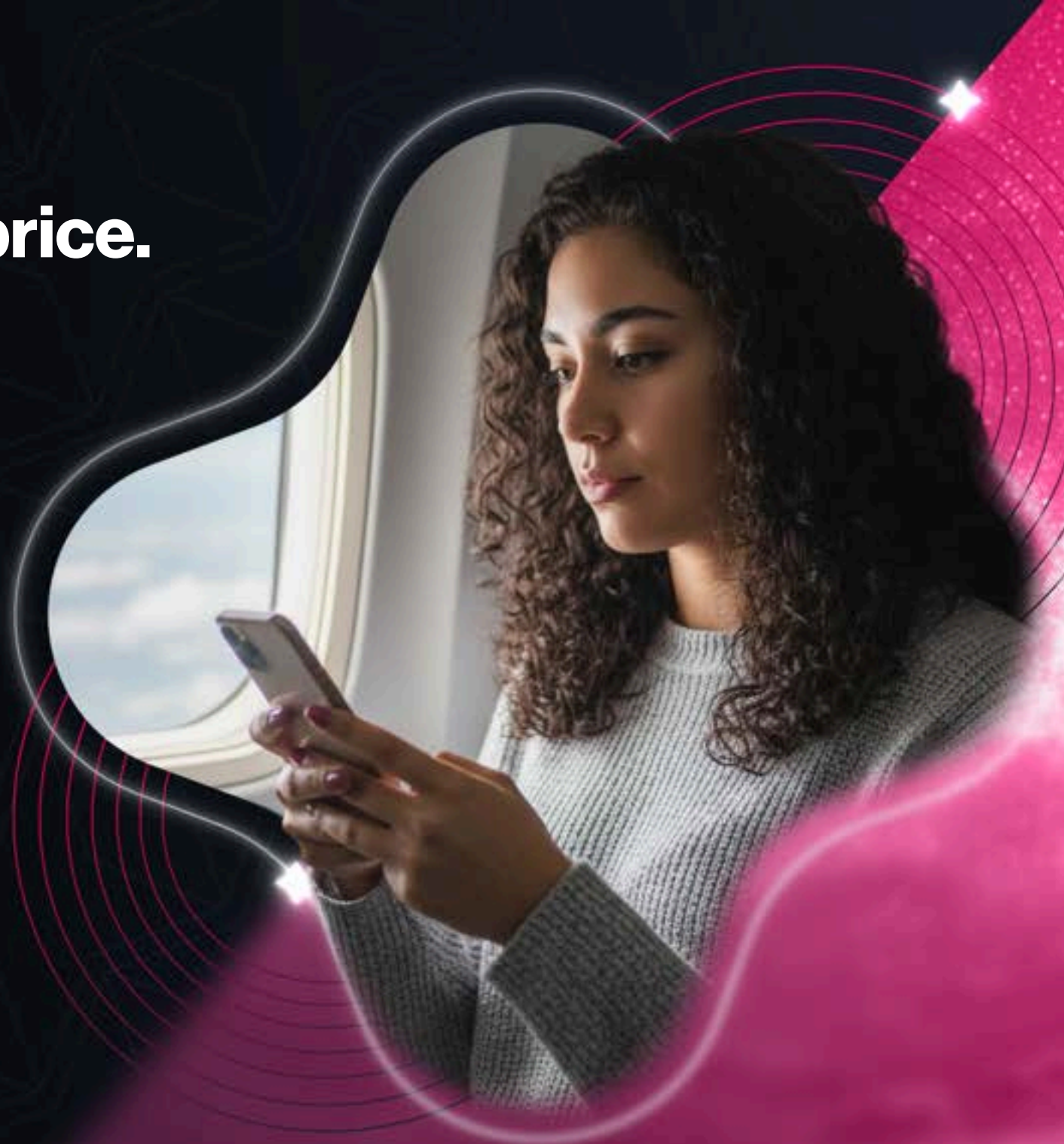
Not exactly. General sale days may be fading, but personalized offers still drive most purchases:

68%

of consumers plan to shop, book or extend services with brands they already trust.

63%

want personalized deals, not blanket discounts.

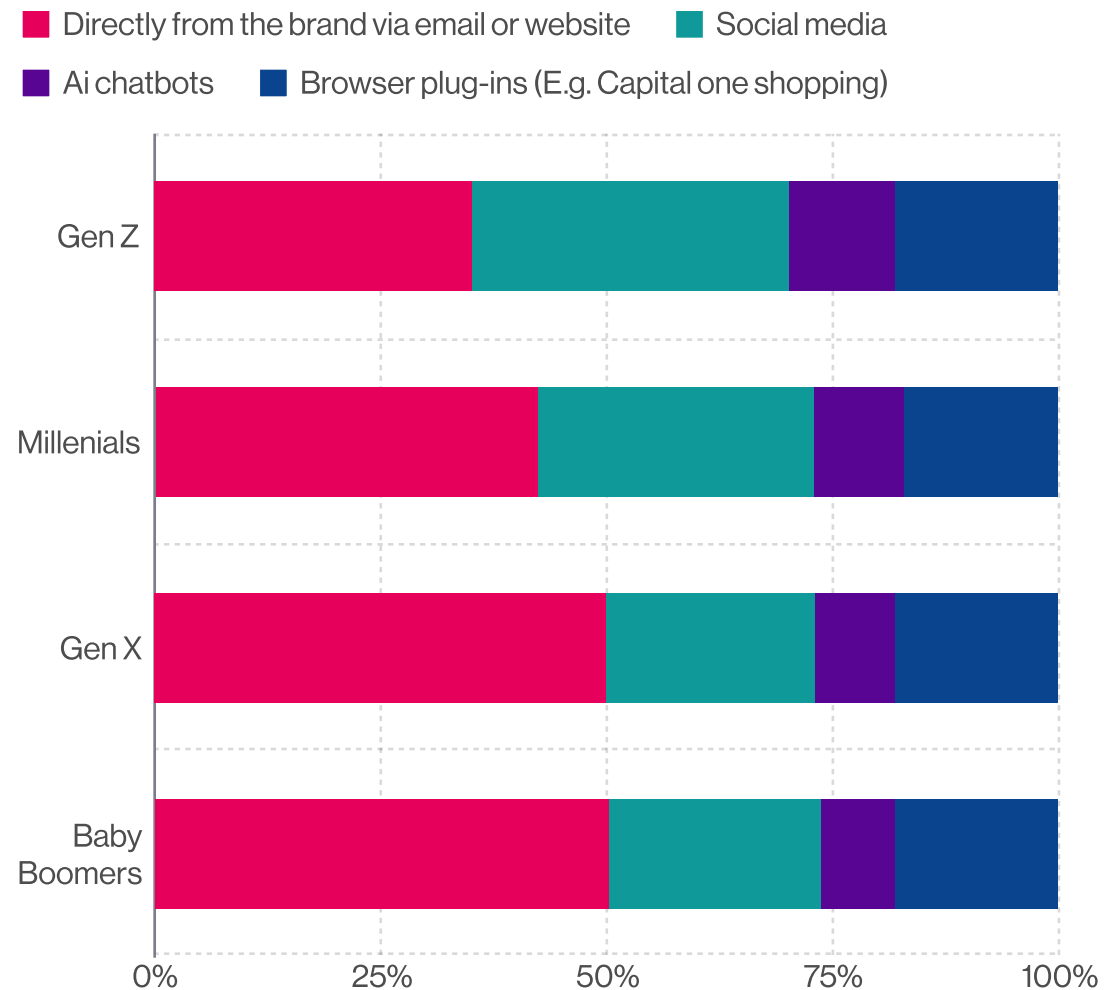


Promo codes still matter too.

- Almost every consumer (**90%**) will use promo codes for their holiday purchases, but **79%** will only use those received directly from a brand.
- *Figure 3* shows responses broken down by generation, showing that regardless of age consumers are most likely to get a promo code direct from the source.

Promotions are important, but context matters more. Brands that personalize experiences are a customers' default choice.

FIGURE 3 - SURVEY QUESTION: WHERE DO YOU FIND PROMO CODES FOR HOLIDAY SHOPPING?



Value over name brand.

Budget caution is real.

Consumers are focused on making purchases that offer more value, both in the product or service and the experience.

50%

will choose more practical gifts for the holidays, including gift cards, groceries and essential items/services.

47%

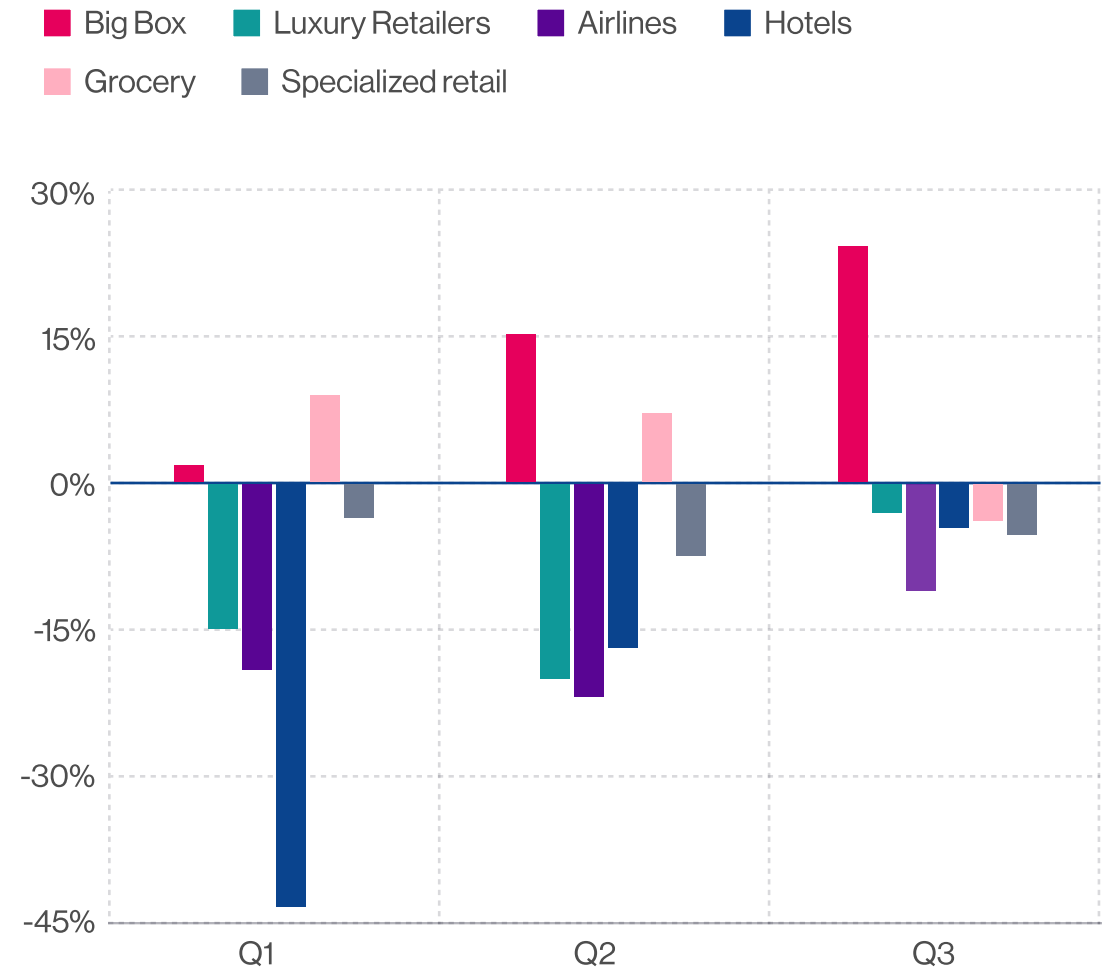
don't care about name brands and will buy "dupe" products to reduce spending.



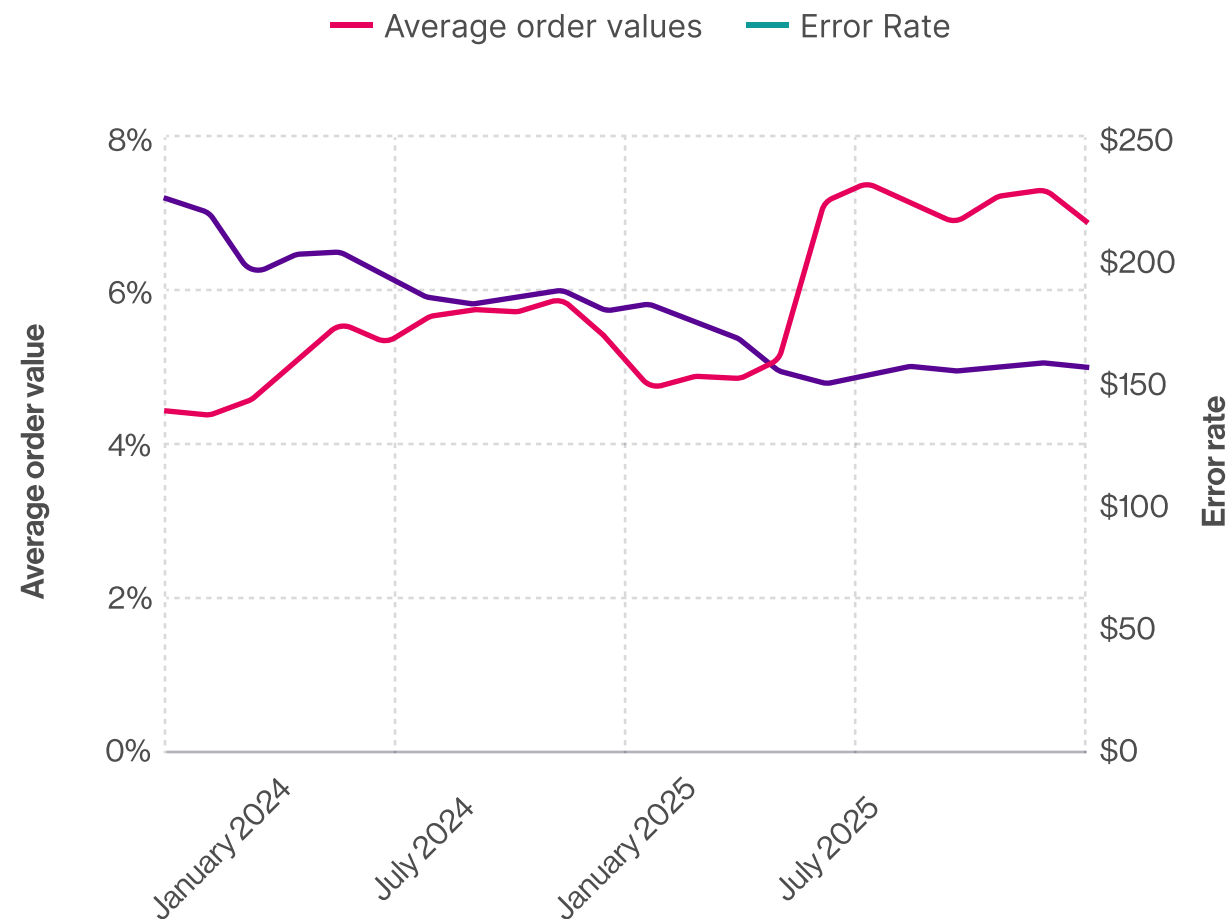
It also means stores that offer more products in one place see bigger carts.

- *Figure 4* shows changes in average monthly order values by types of retailers between 2024 and 2025. Taking a look we see big box average order values (AOV) are up **26%**, while other retail storefronts see declines.

FIGURE 4 - YOY CHANGE IN AVERAGE ORDER VALUE: 2024-2025



**FIGURE 5 - 2025 MONTHLY RETAIL
AVERAGE ORDER VALUE & ERROR RATE**



Convenience and reliability are also king. That means a seamless, error-free experience will go a long way.

- Quantum Metric data shows in *Figure 5* that as monthly retail error rates dropped **22%** from 2024-2025, average monthly order values grew **23%**.

Customers don't distinguish between marketing and product; they just remember how it felt to shop on your site or app. Brands need to make an impact in every instance.

2-3

The average number of times a customer visits a site before making a purchase.

4-6

The average number of times a customer visits a site before purchasing luxury items, booking travel or buying holiday gifts.



What sources drive the most site traffic and the most sales?

It depends on the industry.

- *Figure 6* shows monthly site traffic by referrer and industry, finding that social media makes an impact for retail and telecommunications (Telco), but travel and financial services (FSI) still rely on mostly direct traffic.
- In every industry, email, ads and even AI still make up less than **1%** of all traffic to a site, which is why they aren't shown.

FIGURE 6 - 2025 TRAFFIC SHARES BY REFERRER

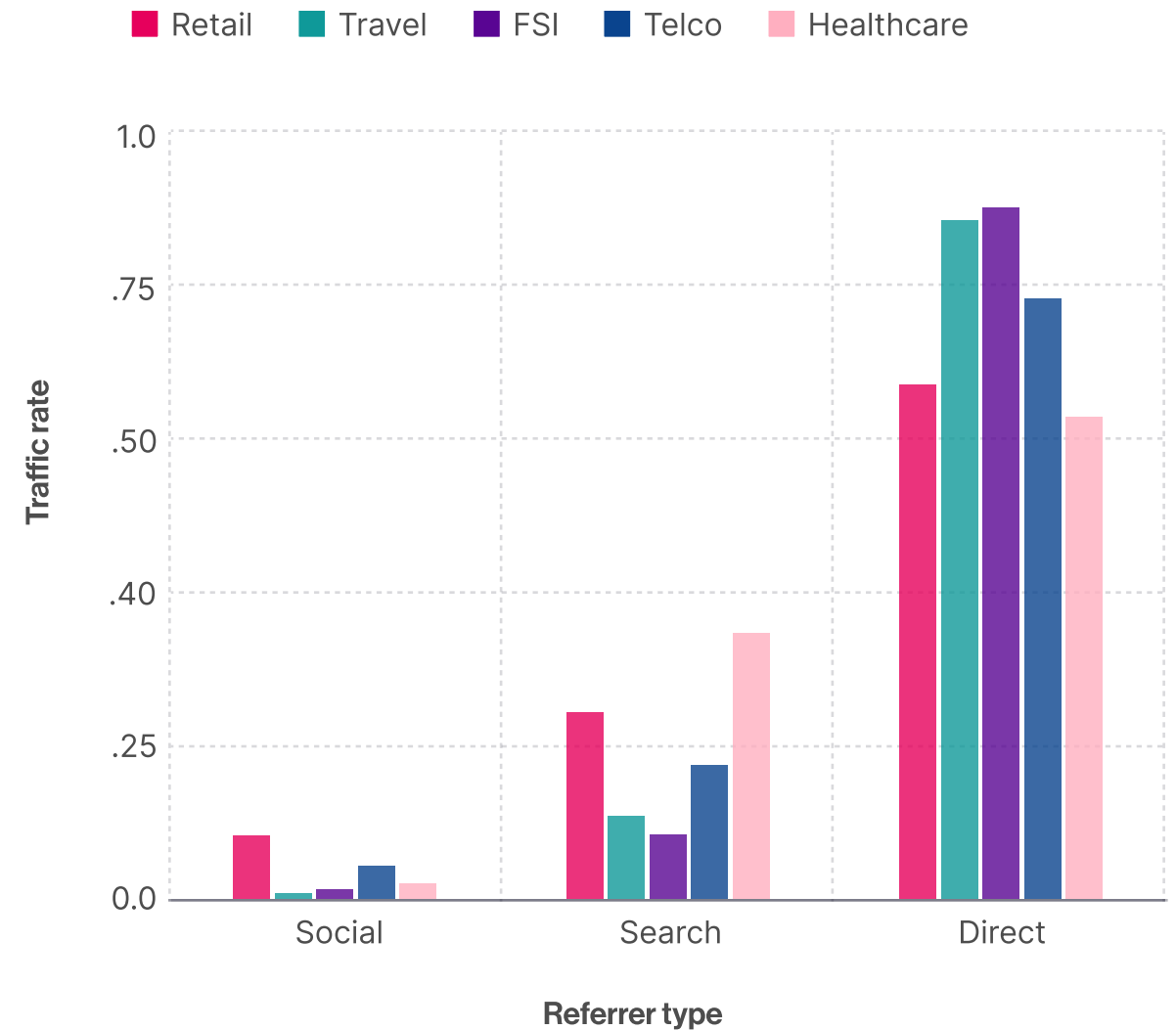
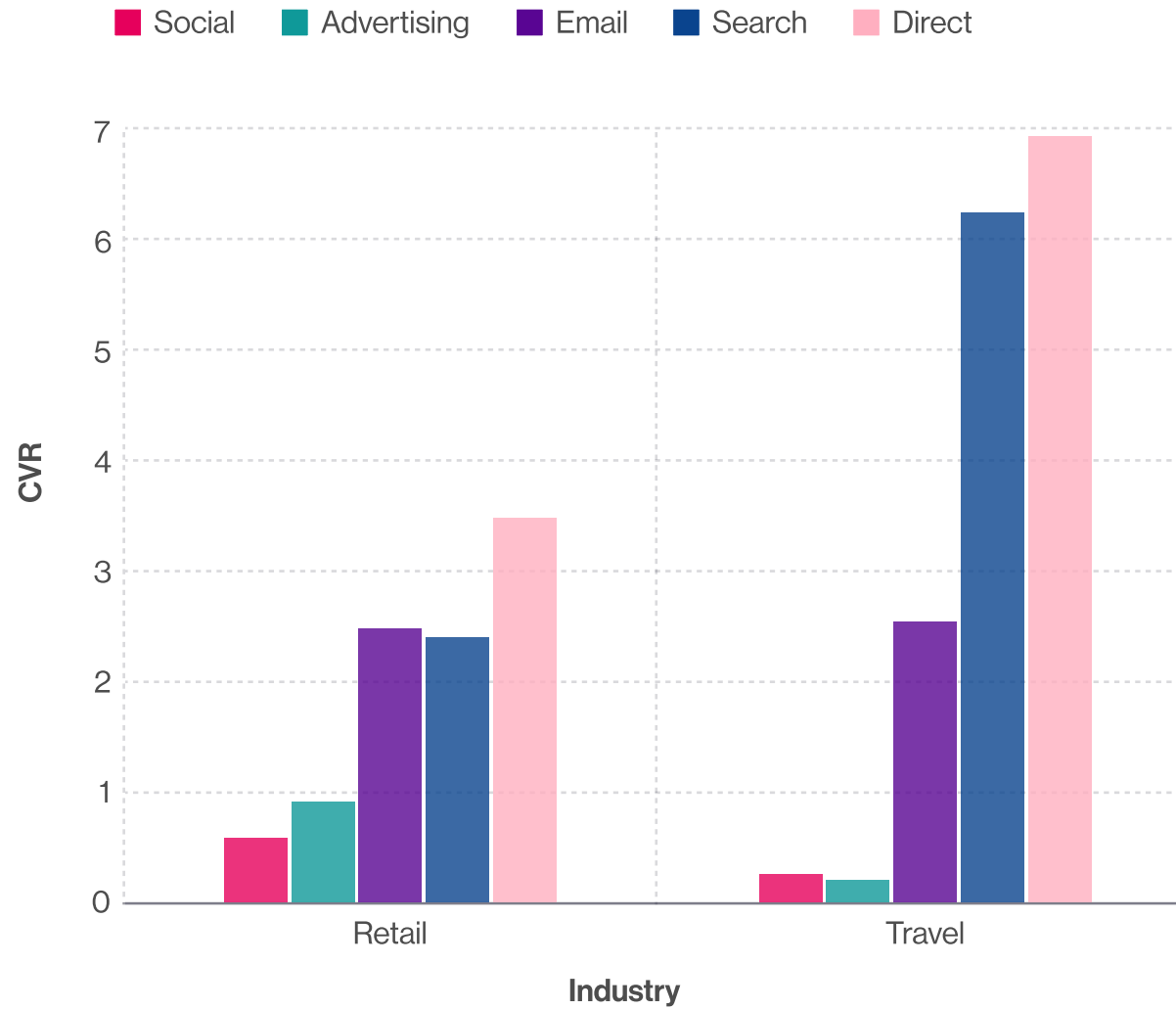


FIGURE 7 – AVG. 2025 CVR BY REFERRER.



- If we look at *Figure 7*, we see that conversion rates for retail and travel brands are **2x** higher when coming direct or through search, than through social media or ads.

The experience is continuous and requires the right intention to drive sales or engagement. If brands are going to drive traffic from ad or social channels, they need to consider how more personalized follow-ups can help boost purchasing intention over time.

AI: The influencer with no brand loyalty.

AI is now the shopping assistant.

42%

of consumers use AI to plan and purchase holiday needs.

23%

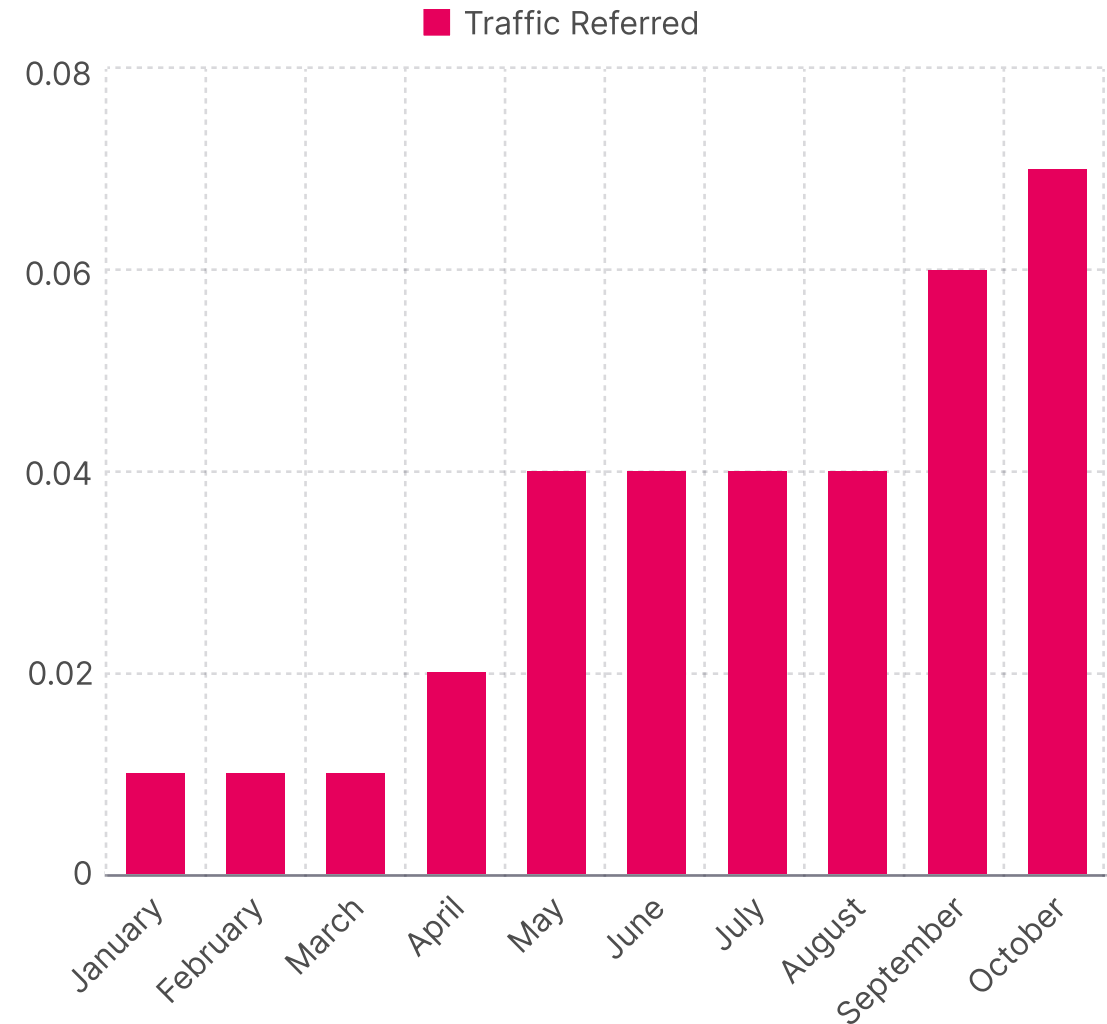
purchased an AI recommended item in the last three months at the same rate as social-driven purchases.



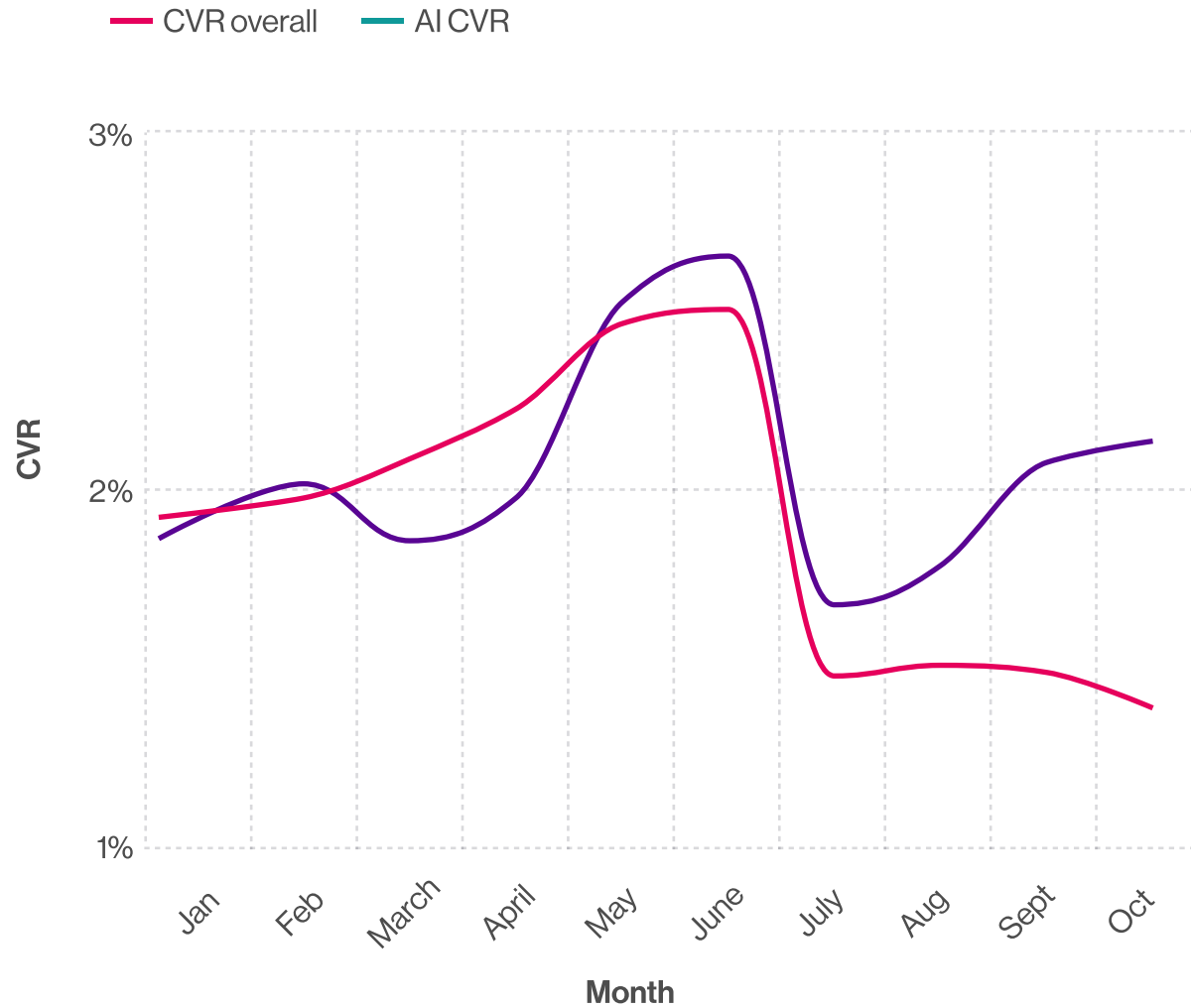
Traffic referred by AI may still sit below 1% of overall traffic, but it is growing quickly.

- *Figure 8* shows that between January and October of this year monthly rates have **increased by 600%**.

FIGURE 8 - 2025 MONTHLY AI REFERRED TRAFFIC SHARES.



**FIGURE 9 - 2025 MONTHLY CVR:
OVERALL VERSUS AI-DRIVEN**



And when traffic from Gen AI chatbots arrives, it's ready to buy.

- *Figure 9* below shows that traffic from AI chatbots converts at rates **43%** higher than average retail CVR.

**AI, however, has no brand loyalty.
If your experience stalls, AI will
recommend a competitor.**

With the rise of agentic AI, concern grows:

1 in 5

consumers are ready to have AI agents
browse and buy or book automatically.
Get something wrong, and that sale goes
to a competitor.

**Brands that optimize content and landing
experiences for AI-referred traffic can turn
curiosity into conversion, before someone
else does.**



Brands that thrive don't wait for big weekends;
they continuously provide experiences that
are effortless, predictive, and personal.

That seamless feeling won't just be beneficial
for human interactions. As agentic AI grows,
brands will need to focus on how to cater near
perfect experiences for humans and AI. That's
the new measure of success.

**In short, holiday sales will happen, they'll
just go to the best experience.**

Discover how Quantum Metric helps teams optimize every digital moment:

<https://www.quantummetric.com/demo-center/live-demos>