

BLACK FRIDAY 2025

December 2025



Global Black Friday Trends

Globally Black Friday online sales reached around \$79 billion, growing 6% year-on-year. Online spending continues to dominate over instore channels, showing a global skew toward digital commerce

In the United States, online Black Friday spending hit \$11.8 billion (a 9% increase from last year), underlining how digital remains the dominate channel in the country that started Black Friday.

Consumer behaviour is also shifting globally. Mobile remains dominant, with mobile-driven purchases and AI-assisted shopping journeys growing faster than ever.

Alternative payment formats are rising worldwide. BNPL(Buy Now Pay Later) is a critical conversion tool, helping consumers manage spending while giving retailers a strong conversion edge.

Retailers globally are evolving their Black Friday playbook, many are now blending discounts with smarter targeting, inventory readiness, omnichannel fulfilment and customer-experience investment. Reducing reliance on deep markdowns alone.



Black Friday in South Africa: What Happened?

Black Friday has evolved into one of South Africa's most important retail moments, with November now functioning as a full shopping season rather than a single event.

The shift to digital continued accelerating, with payment platforms reporting record online activity. Peach Payments alone processed over 2.6 million transactions worth more than R1.86 billion.

Discovery's data reinforces this momentum, showing that transaction volumes rose by 5% compared to 2024 and 13% compared to 2023, while their average spend per customer increased by 3%.

Individual transactions reached amounts of R500,000, R1 million and even R3 million, especially in categories such as travel and high-end electronics. These patterns reflect a shopper base that now trusts digital platforms for major purchases.

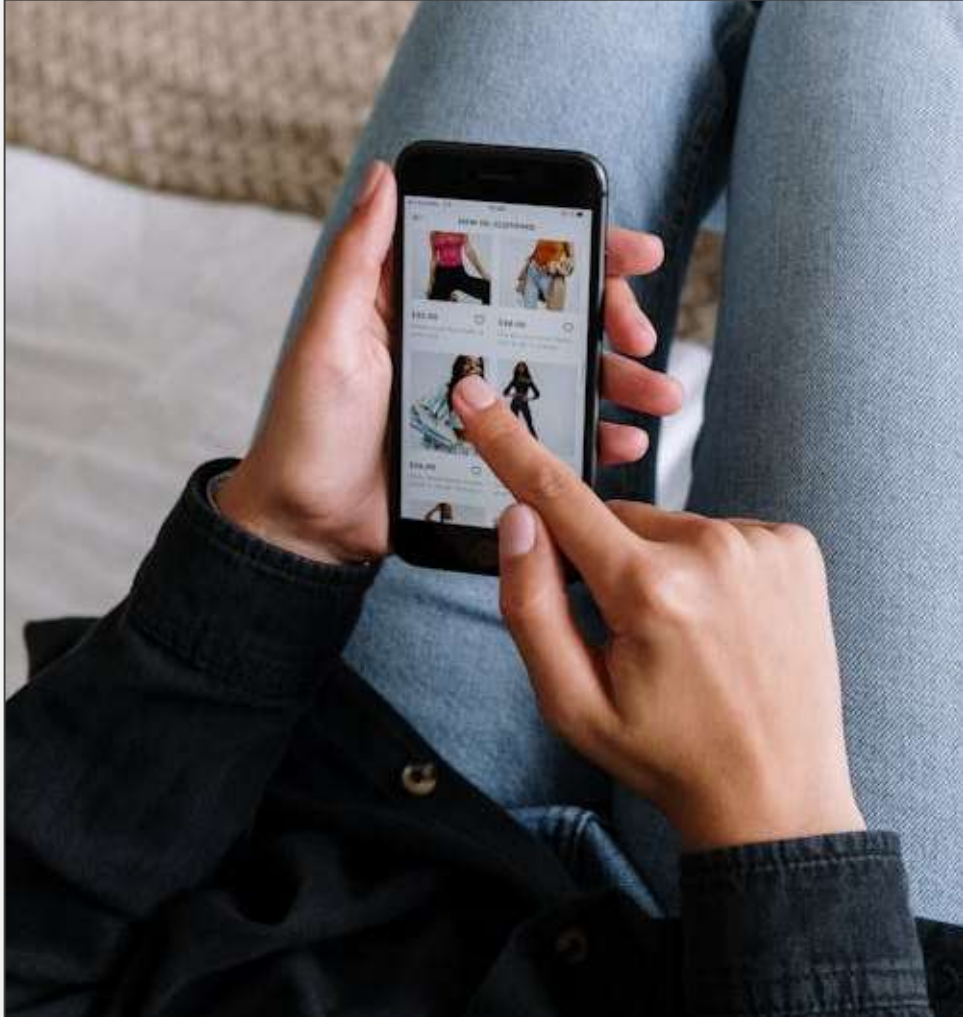
South Africa's rapidly expanding e-commerce landscape set the backdrop for this performance. Online shopping is projected to reach R130 billion by the end of 2025, growing nearly 40% annually (far outpacing traditional retail).



BLACK FRIDAY HAS BECOME AN ECONOMIC ENGINE RATHER THAN A PROMOTIONAL MOMENT.

Sources: (BusinessTech), (MyBroadband), (Capitec Bank), (The Media Online), (Discovery) & (Peach Payments)

Key Consumer Behaviour & Retail Shifts



South Africans entered Black Friday with heightened discipline and intention. Their approach involved early research, price tracking and strategic planning. The weekend spike remained powerful, but it was supported by a steady build-up of activity from earlier in the month.

Digital behaviour surged. Online baskets were larger than in-store, signalling trust in e-commerce and comfort with purchasing high-value items digitally. Mobile-first checkouts, alongside rapid payment experiences, reduced friction and accelerated conversion. Consumers gravitated toward alternative payment tools, with BNPL and digital wallets experiencing explosive adoption as shoppers sought flexibility and budget control.

Spending cuts across categories showed a consumer base that is increasingly value-driven yet willing to invest where affordability aligns with opportunity. South Africans continued spending widely without reducing quality or intent.

Sources: (BMR), (BizCommunity), (The Media Online) & (Citizen)

Who Did Black Friday Best: Local

Checkers Sixty60 delivered one of the most impressive Black Friday performances in South Africa, driven by scale, operational speed and exceptional digital adoption. The service recorded its highest-ever number of orders in a single week during the Black Friday period, with MyBroadband confirming that Sixty60 “hit record order volumes” across Black Friday and the days surrounding it. Demand surged to the point that Sixty60 became South Africa’s most downloaded shopping app over the Black Friday weekend, consistently holding the No. 1 position in the local iOS and Android app stores. This spike was supported by rapid fulfilment: the platform sustained sub-60-minute delivery windows even during peak hours.

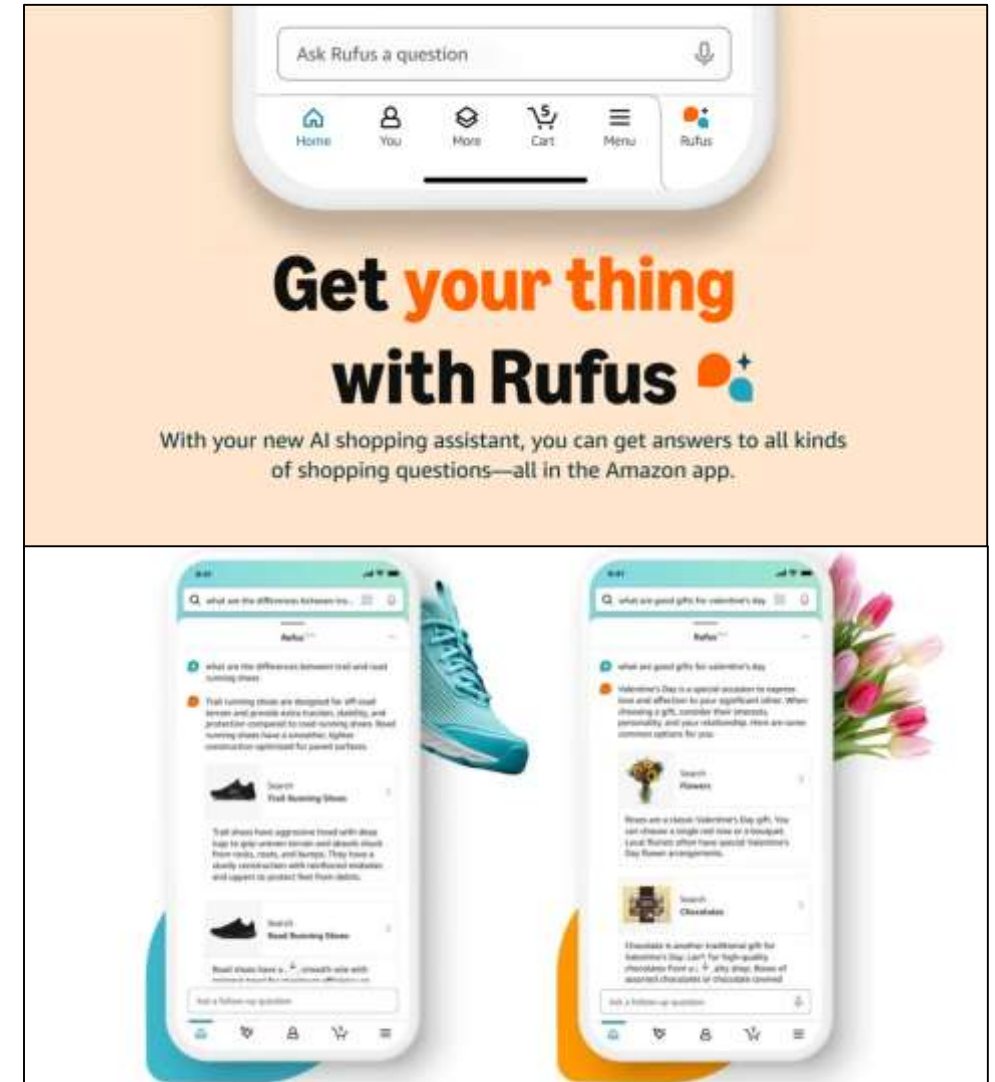
Sixty60’s growth was not just in volume but in behaviour. Shoprite reported that digital grocery demand increased more than 40 percent year-on-year, with Sixty60 as the primary driver. Retail media performance inside the app also accelerated, with brands reporting significant increases in deal engagement as Sixty60 personalised Black Friday promotions for millions of users in real time. The platform’s ability to combine speed, real-time stock accuracy and personalised offers positioned it as the standout winner in South Africa’s Black Friday digital retail landscape, mirroring the same AI-enabled, conversion-driven impact that Amazon achieved globally.



Who Did Black Friday Best: Global

Amazon delivered one of the strongest global Black Friday performances, driven by the integration of its AI shopping assistant Rufus. The tool helped customers discover products faster, compare options instantly and navigate thousands of deals in a personalised way. This intelligent guidance played a major role in boosting conversion, supporting what became one of Amazon's biggest Black Friday events on record. Across the Black Friday to Cyber Monday period, Amazon customers purchased more than a billion items worldwide. Rufus also shaped shopper behaviour at scale, appearing in 38% of Amazon shopping sessions and helping drive a 35% day-over-day surge in Black Friday engagement.

The performance impact was clear. Sessions using Rufus saw purchase conversions increase by 10%, compared to only a 20% rise in sessions without it. Traffic involving Rufus grew faster than Amazon's overall site traffic, and Prime-Day-level adoption accelerated into the Black Friday window. By blending large-scale fulfilment with AI-powered discovery, Amazon created a guided, high-trust shopping experience that removed friction at every stage. Rufus didn't just improve recommendations; it shaped intent and purchasing decisions, demonstrating how AI is becoming a decisive competitive advantage in global retail.



Discovery SpendTrend Black Friday 2025 Key Takeouts

- Older age groups spend significantly more per transaction, especially online.
- Food & drink dominates both spend value and purchase volume, indicating high frequency and importance.
- Recreation and travel rank high in spend value but lower in purchase count, suggesting fewer but higher-value transactions.
- Joburg has the highest in-store average (R557), while 61+ age group leads online spending (R1,403)
- Daytime shopping preference (10:00-15:00) indicates consumers favour mid-morning to early afternoon for instore visits.
- Daytime hours (09:00-15:00) remain the most active for online purchases, similar to instore trends.
- Growth trend from 2024 to 2025 suggests increasing consumer confidence and reliance on online shopping.



FACTS: Instore Shopping

amongst Discovery Bank shoppers



Woolworths, Spar, Pick n Pay and Checkers dominate instore shopping, showing that groceries remains the top category for instore.

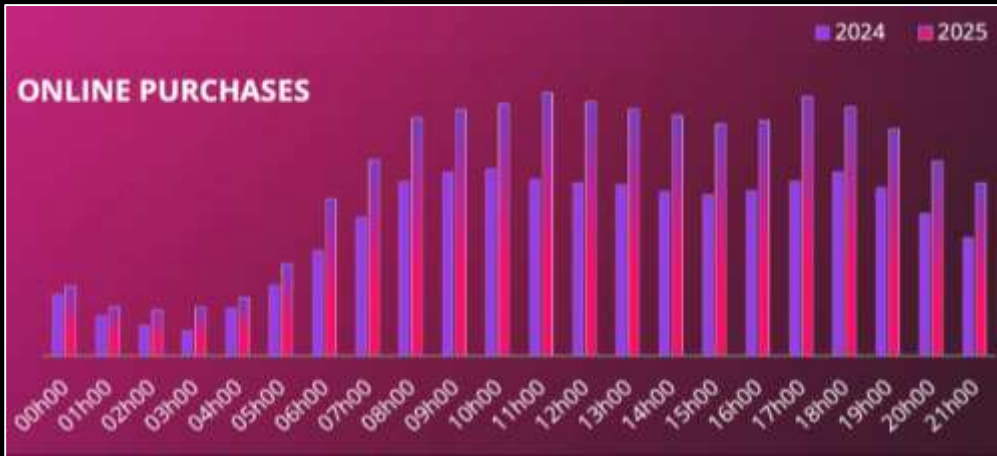
iStore ranks in both categories.

Clicks and Dis-Chem sit in the middle of both tables. Their top categories were health, beauty, personal care, and baby essentials.

Instore by total card spend value	
1	Woolworths
2	Checkers
3	Pick n Pay
4	Spar
5	Dis-Chem
6	Clicks
7	Makro
8	Hirsch's
9	iStore
10	Liquor Shop

Instore by total card purchases	
1	Woolworths
2	Spar
3	Checkers
4	Pick n Pay
5	Clicks
6	Dis-Chem
7	Tops
8	Liquor Ship
9	iStore
10	Liquor Shop

FACT: Online Shopping *amongst Discovery Bank shoppers*



Takealot and Checkers Sixty60 dominate online shopping, leading both spend and purchase frequency.

International platforms (Amazon, Temu, Shein) are gaining traction.

Fashion and beauty retailers (Superbalist, Shein, Dermastore) show strong presence in spend value.

Online by total card spend value	
1	Takealot
2	Checkers Sixty60
3	Amazon
4	One Day Only
5	Woolworths Dash
6	Superbalist
7	Makro
8	Temu
9	Shein
10	Dermastore

Online by total card spend value	
1	Checkers Sixty60
2	Takealot
3	Temu
4	Amazon
5	Woolworths Dash
6	One Day Only
7	Superbalist
8	Bash
9	Shein
10	Pick n Pay asap!

FACTS: Card Transactions & Categories *amongst Discovery Bank shoppers*

	Average local instore card transaction value	Average online card transaction value
Overall	R497	R905
25 years and under	R276	R518
26 to 45 years	R436	R814
46 to 60 years	R667	R1 211
61 years and over	R713	R1 403
Cape Town	R472	R935
Durban	R514	R883
Joburg	R557	R958
Pretoria	R509	R875

Largest single card transaction value:

R500 000

Top categories by total card spend value		
1	Food and drink	27% of spend value
2	Recreation	13%
3	Transport and travel	10%
4	Home	10%
5	Health and personal care	9%

Top categories by number of total card purchases		
1	Food and drink	48% of purchases
2	Transport and travel	13%
3	Recreation	8%
4	Health and personal care	7%
5	Clothing	5%

Lesson For Retailers Next Black Friday

Lesson	Why It Matters (Based on What Happened 2024-2025)
Invest in e-commerce & omnichannel infrastructure	Online and mobile shopping drove large part of the sales; and retailers with seamless omnichannel had a stronger showing.
Offer payment flexibility & modern checkout options	Increased use of alternative payment methods and digital platforms improves conversion, especially among cost-conscious shoppers.
Stock and plan smart	Electronics, essentials, household goods with economic pressure, value-driven categories tend to outperform luxury or discretionary ones.
Blend online + in-store experiences	Mix of online and experiential or in-store shopping helps cater to different customer preferences and maximises reach.
Use data & insights to inform timing, inventory and promotions	With payment platforms and e-commerce tracking, retailers now have data to forecast demand, optimise stock and tailor promos.



Sources: (BMR) & (BusinessTech)

Year-on-Year Comparisons

Metric / Indicator	2024	2025	Change / Trend
Digital-payment volume (transactions via major platforms)	–	2.6 million+	Significant scale-up (platforms report record processing)
Average digital basket value	R935 (online) vs R513 (in-store)	Similar or slightly higher online basket sizes; high-value outliers increased	Online baskets remain high; premium spend rising
Share of big-ticket & luxury-value transactions (R500k+)	Present but less frequent (2023-24 less anecdotal)	Multiple R500k-R1m+ transactions logged	Big-ticket buying more confident/trusted digitally
Economic value of “November retail + Black Friday season”	R88 bn value contribution (2023-24)	Increasing share of online + in-store blended growth; projections suggest strong 2025 spike	Retail season strengthening as structural economic driver
Online retail market projection	(pre-2025) growing, but < R130bn level	Forecast to hit R130bn by end-2025	Steep growth in e-commerce adoption nationally

Key Takeouts

Black Friday is structured

The surge across transactions, value and high-ticket buys means BFCM has become a fixed pillar in SA's retail calendar. Planning for November should start months in advance, not days

Digital is dominant and rising fast

With online baskets nearly double in-store averages and high-value trust growing, e-commerce is now a core channel and not a fringe experiment.

High-value, high-trust tickets are back

The increase in R500k-R1m+ transactions proves consumers will spend big when value meets trust. Retailers must be ready: inventory, fulfilment, customer service.

Retailers must blend speed, flexibility & scale

Digital infrastructure, payment flexibility, stock readiness and omnichannel fulfilment are no longer optional. They define who wins and who lags behind.

Data from this period becomes long-term strategy fuel

Insights from November's performance (categories, payment behaviour, spend patterns) should feed your 2026 strategy. Treat Black Friday as your Q4 analytics baseline.

**LET US GROW YOUR
AUDIENCE FOR YOU!**

