tyroo

Festive Playbook 2026

How Asia-Pacific discovers, gifts, spends and celebrates.



APAC's Festive Season Is Bigger Than a Single Peak

Longer, more distributed and more local than ever.

US$238B

was spent across China's 11.11 (Singles' Day) in 2025 – run over a 36-day window from 7 October to 11 November 2025. It's one of the world's largest festive shopping events, and now just one peak inside a season that stretches across months.[1]

Festive shopping no longer peaks on a single day. Across Asia-Pacific it has become the year's largest concentration of shopping, gifting and celebration – building over weeks and, increasingly, months. And it's still growing.

Three forces are reshaping it:

The season is getting longer, with discovery opening well before the peak and demand extending beyond it.

The journey is more distributed, across creators, video, marketplaces, AI and fast fulfilment.

The moments are more local, with each market's festivals carrying their own reason to shop.

Sources – [1] Syntun, China 11.11 all-platform GMV (CN¥1.695T), 2025

The Festive Landscape 2026

China

11.11-led mega-sales

Powered by livestream and instant retail around the event.[1]

Win the event spikes – but build always-on livestream and instant-delivery presence.

Southeast Asia

Stacked double-date mega-sales

81% of shoppers buy during an event like 9.9 or 11.11.[3]

Separate cultural from platform moments; convert on value and content.

South Korea

Value-led, flexible gifting

Value-oriented gift-set ranges at Korea's top department stores expanded by 30–40%, with smaller packs and more choice.[5]

Offer clear price tiers; make quality and value easy to compare.

India

A quick-commerce and new-shopper surge

Festive online GMV forecast at ₹1.50–1.55 lakh crore, up 25–29%.[2]

Growth is volume-led: plan for frequency, availability and speed, not bigger baskets.

Japan

Ritual, premium and reliability

Japan's e-gift market is estimated to have grown 27.7% to ~JP¥645B in 2025.[4]

Localise the reason to gift; lead with quality and trust, not discounts.

Australia / New Zealand

A November-led, value-conscious peak

Black Friday folded into Christmas.[6]

Use November to build demand; make value and delivery explicit.

Sources – [1] Syntun, 2025 · [2] Datum Intelligence, 2026 forecast · [3] Google/Ipsos, 2024 · [4] Yano Research Institute, 2025 Gift Market White Paper · [5] Seoul Economic Daily, 2026 · [6] ARA/Roy Morgan, 2025

Mapping the Festive Pulse

From Diwali to Lunar New Year – one season, many moments, each with its own reason to shop.

Diwali & Dhanteras

6–8 Nov 2026

India's biggest sales period, with peak GMV and affiliate conversions. Beyond electronics, **grocery, beauty and quick commerce** are driving forecast growth.

11.11 Singles' Day

11 Nov 2026

The world's largest sale-day – US$238B across China in 2025 – with discovery opening before the event and buying compressing onto the peak.[1]

Black Friday & Cyber Monday

27–30 Nov 2026

A Western import accelerating across SEA, India and Australia, led by electronics and cross-border value shopping – Australia's BFCM weekend was forecast at ~A$6.8B in 2025.[2]

12.12

12 Dec 2026

SEA's **second-biggest online shopping surge** – year-end clearance plus gifting across fashion, beauty, home and electronics. Many platforms extend deals; cross-border sales are rising.

Christmas & New Year

25 Dec 2026 – 1 Jan 2027

Strong festive commerce across Australia, New Zealand, Japan, Korea and SEA metros. Top categories: **luxury gifting**, lifestyle, gourmet, toys and travel experiences.

Lunar New Year

6 Feb 2027

Peak retail for China, Korea, Vietnam and Singapore. Focus on **gifting, premium food, home and family travel** – a major moment for new-year launches.

Sources – [1] Syntun, 2025 · [2] ARA/Roy Morgan, 2025 forecasts

Global Festive Moments Reshaping the APAC Region

Beyond local festivals, globally originating sale moments now shape APAC demand – spreading across markets, pulling shopping earlier and folding into a longer, multi-event season.

	11.11 Singles' Day	Black Friday & Cyber Monday	12.12	Christmas & New Year
How it's reshaping APAC	Born in China, now a major **platform-led shopping moment** across Southeast Asia via TikTok Shop, Shopee and Lazada.[1]	A **Western sale import**, now folded into value windows across Australia, New Zealand, SEA and post-Diwali India.[2]	Southeast Asia's **year-end close** to the mega-sale cycle.	The **global gifting peak** – strongest across Australia, New Zealand, Japan, Korea, SEA and Indian metros.
Festive shopper behaviour	Discovery and pre-sale open in mid-October; buying compresses onto the day; cross-border rising.	Electronics- and deal-led; increasingly a gifting-planning trigger and a cross-border moment.	Last-chance urgency; clearance and live- and content-led gifting.	Gifting widens into food, travel, experiences and self-gifting.

>40% growth in Lazada's Southeast Asian sales during 11.11 2025 versus a similar September campaign – a China-born sale moment now driving demand across the region.[3]

Sources – [1] Syntun, 2025 · [2] ARA/Roy Morgan, 2025 · [3] CNA, 11.11 2025

How Festive Shoppers Buy Now

Deliberate, mobile-first and research-heavy – with the decision still made close to the moment.

9 in 10

Indian festive shoppers who bought said they **researched before purchasing** – festive buying is now planned, not impulsive.[1]

Researching hard before buying

8.3

search queries and **7.7 online videos**, on average, per festive shopping journey.[1]

Starting the journey earlier

70%+

begin researching **at least a week** before a mega-sale.[2]



Deciding on video and social

>40%

growth in Lazada's **SEA sales** versus a similar September campaign; on Shopee Singapore, livestreams and short videos helped shoppers decide.[3]

Buying value – trading up on the hero gift

30–40%

expansion in **value-oriented gift-set ranges** at Korea's top department stores, with smaller packs and more choice.[4]

Looping across channels before deciding

65%

of shoppers **research online then buy in a store**; **58%** do the reverse.[5]

Sources – [1] Google/Ipsos India (Navratri/Diwali), 2025 · [2] Google/Ipsos SEA, 2024 · [3] CNA, 11.11 2025 · [4] Seoul Economic Daily, 2026 · [5] Datum Intelligence, 2026

Stage by Stage: The Shopper's Journey

Attention builds early, money compresses late – and each stage asks something different of the brand.

	1. Discovery	2. Consideration	3. Intent	4. Purchase	5. Loyalty
	4–6 weeks before	3–4 weeks before	2–3 weeks before	Peak festive weeks	1–4 weeks after
The shopper is…	Looking for gift ideas and occasions, weeks before the peak.	Comparing options, prices and reviews across surfaces.	Checking trust, value, finance and delivery before committing.	Buying fast on the moment – last-minute, live and top-up.	Returning, gifting again and replenishing after the peak.
Reach them on…	Social (TikTok, Instagram, WeChat, LINE), YouTube and CTV.	Search, marketplaces, WhatsApp and social sharing groups.	Retargeting (social and display), email, push notifications, creator reviews and ratings.	Mobile apps, social commerce (TikTok Shop, Instagram Shopping), WeChat Pay and quick-commerce apps.	Email and app re-engagement, WhatsApp and chat support, brand communities.
The brand must offer…	**Cultural storytelling, creator collabs, gift guides and paid social.**	**Comparable product data, reviews, SEO/SEM and coupons.**	**Proof and ratings, EMI/BNPL, a credible delivery promise and personalised retargeting.**	**Fast checkout, live shopping, cashback and quick-commerce fulfilment.**	**Rewards, referrals, replenishment and next-occasion offers.**

Shopping With AI: The Assisted Shopper

AI has moved from novelty to a working part of the festive journey – but its role differs by market.

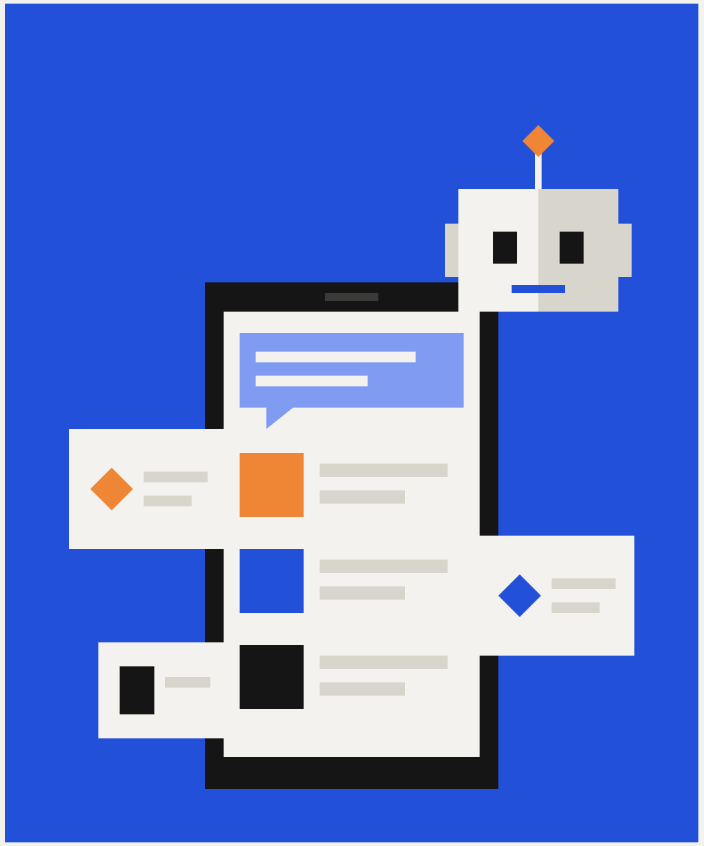
◆ **India**

7.5

generative-AI **chatbot interactions** per Indian festive shopping journey.[1]

- **China:** Alibaba's 11.11 2025 was its first large-scale generative-AI deployment, adding conversational search, AI shopping assistance and wish lists.[2]
- **Southeast Asia:** Lazada deployed five AI agents ahead of 11.11 across discovery, purchase and after-sales.[3]
- **Japan:** 51% of consumers planned to use AI to discover products or find deals during the 2025 BFCM/year-end season.[4]
- **Australia:** 35% planned to use an AI tool such as ChatGPT for holiday shopping in 2025, rising to 56% of those under 45.[5]

The implication is practical: brands need product, price, review and availability **information** structured clearly enough for **AI systems** to understand, compare and surface – not just for search engines to index.



Sources – [1] Google/Ipsos India, 2025 · [2] Alibaba, 11.11 2025 · [3] Lazada, 11.11 2025 · [4] Shopify Japan, 2025 · [5] PayPal Australia, 2025

Gen Z & Millennials: The New-Age Shopper

How the region's youngest shoppers are rewriting festive discovery, gifting and spending.

China

93%

of Chinese Gen Z **shopped 11.11** in 2025, with emotional-value categories such as collectibles gaining attention.[1]

Singapore

58%

of Gen Z preferred **personalised gifts** chosen specifically for the recipient during the 2025 Black Friday/holiday season.[2]

Japan

42%

of 18–34s who planned to shop expected to **spend JP¥50,000+**.[3]

Thailand

67%

of Thai users **trust sponsored creator reviews** on YouTube, highlighting the role of creator-led product validation.[4]

Australia

90%

of Gen Z planned to shop the 2025 **end-of-year sales**, while **56%** planned to use **BNPL**.[5]

India

7 in 10

Gen Z say **creators help them discover** festive products, while **76%** say instant feedback from **people they trust** makes them more confident to buy.[6]

The common thread:

For younger APAC shoppers, the festive season is identity and experience

– discovered through people they trust and completed on the phone. Brands that show up in that world, not just in the sale, are the ones they carry into the next occasion.

Sources – [1] Soul App, 2025 · [2] Amazon Singapore/YouGov, 2025 · [3] Shopify Japan, 2025 · [4] Google/Kantar (YouTube), 2024 fieldwork · [5] PayPal Australia, 2025 · [6] GWI × Snapchat, 2026

Shopper Insights, Region by Region

From value hunting to AI-driven choices, what triggers a festive purchase changes by market.

China

~600

brands each passed **RMB100 million** in sales on Tmall during 11.11 2025 – Tmall's strongest 11.11 growth in four years.[1]

Leans into **livestream and instant retail** around major sale events.

Southeast Asia

81%

of shoppers buy during a **double-date event** such as 9.9 or 11.11.[2]

Livestreams and short video are now part of the 11.11 purchase journey.

India

~1.5%

fall in the **average basket** forecast, even as festive GMV grows – growth comes from more shoppers, not bigger baskets.[3]

The basket is broadening: **grocery** is set to **overtake mobiles** as India's second-largest online category in 2026.[4]

Sources – [1] Alibaba Group, 11.11 2025 · [2] Google/Ipsos SEA, 2024 · [3] Datum Intelligence, 2026 forecast · [4] Redseer/Business Today, 2026 forecast

Shopper Insights, Region by Region

From value hunting to AI-driven choices, what triggers a festive purchase changes by market.

Japan

+52.7%

growth in **holiday e-gift GMV** on AnyGift in 2025.[1]

57.3%

of AnyGift's e-gift GMV came from **gifts priced at JP¥7,000+** – premium gifting remains important.[1]

South Korea

+273%

month-on-month rise in **gift-set searches** on a South Korean resale platform around Lunar New Year 2026.[2]

Younger shoppers are reselling unwanted gifts and reinvesting in products that better match their personal tastes.[2]

Australia

~A$6.8B

forecast for the 2025 **BFCM weekend** – November is the on-ramp to Christmas.[3]

29%

of Australian shoppers were buying gifts **earlier** than the year before; only 8% were leaving it later.[4]

Sources – [1] AnyGift (AnyReach), 2025 · [2] Asia Business Daily (Bunjang data), 2026 · [3] ARA/Roy Morgan, 2025 forecast · [4] ARA/Roy Morgan, Dec 2025

What's Changing in the Festive Basket

India – the basket is broadening beyond electronics

33% → 29%

Mobiles' share of festive online sales is forecast to slip, as everyday categories take a bigger slice.[1]

Why it matters: the festive mission is expanding from the single big upgrade to everyday replenishment, self-care and last-minute top-ups.

China – beauty, gifting and convenience lead

1 in 4

Chinese consumers were willing to spend more on **beauty services and festive gifting** during the 2025 Spring Festival.[2]

Why it matters: festive demand is extending beyond traditional gifts into beauty, services and fast top-up missions.

Southeast Asia – beauty and self-care win the mega-sales

+352%

Spike in **health & beauty** sales on Singles' Day versus the first week of October.[3]

Why it matters: mega-sales are a major customer-acquisition window – and beauty is a strong entry category for new shoppers.

Japan – gifting goes digital and premium

57.3%

of holiday e-gift GMV on AnyGift came from **gifts priced JP¥7,000+**.[4]

Why it matters: gifting is moving online without trading down – premium digital gifts still carry the season.



Sources – [1] Redseer/Business Today, 2026 forecast · [2] NIQ, Spring Festival 2025 · [3] Criteo, Singles' Day 2023 · [4] AnyGift (AnyReach), 2025

Diwali – India's Festive Runway

The peak of India's long festive season – where a whole quarter of shopping intent comes to a head.

7 in 10

Diwali shoppers research **before sale events open** – over a third (36%) are already exploring by 1 August – yet most hold the purchase for the sale days themselves.[1]

How India is shopping for Diwali 2026

- **The peak has moved later.** Diwali falls on 8 November 2026, three weeks after 2025's 20 October – so conversion peaks in November.
- **Tradition meets aspiration.** After a sharp gold rally, shoppers are in wait-and-watch mode, with buying shifting toward lighter-weight jewellery and digital gold.[2]
- **Quick commerce is surging** – forecast to grow 110–120% – making fast delivery part of the festive promise.[3]
- **The scale is national.** Traders estimated Diwali 2025 trade at ~₹6.05 lakh crore.[4]
- **Families decide together.** Multi-generational decision-making shapes big-ticket buys.
- **Demand is shifting beyond the metros.** Amazon India logged 2.76B festive visits in 2025, 70% from tier 2 and 3 cities.[5]



The Diwali principle

One cultural moment, many reasons to buy – spread across a longer runway. Shoppers start months out and need several touchpoints before they buy, so the brands that win Diwali show up while people are still deciding, not just when the sale opens.

Sources – [1] Datum Intelligence, Festive AdEx 2026 · [2] World Gold Council, 2026 · [3] Redseer/BW Retail World, 2026 forecast · [4] CAIT via Business Today, 2025 · [5] Amazon India, Great Indian Festival 2025

What Brands Need To Do Differently This Season

The move	Shift from...	...To
Plan by market and moment	One APAC message and one peak	A **calendar of local and imported moments**, each with its own reason to buy
Be AI-legible	Optimising for search and the shelf	Structured product, price, review and availability data **AI assistants can read**
Build around live & creator content	Treating creators as an add-on	Livestreams and creators **planned in from the start** as festive infrastructure, driving discovery through to checkout
Connect discovery to fulfilment	Winning the click	**Winning the last mile** – inventory, quick commerce and real-time payments
Measure the decision	Last-click attribution	Understanding **which touchpoints built** the festive decision across the runway

Win the weeks around the peak, localise every moment and connect discovery to fulfilment – that's where 2026 growth is.

Localise the Moment, Don’t Fragment the Journey

Most brands activate the festive season in fragments – market by market, channel by channel. Tyroo connects it end-to-end.

What needs to connect

Market intelligence

Identify the **right cultural and commercial moments**, category missions and local triggers, market by market.

Discovery

Connect **creators, social, CTV/video, AI and search** around the moments when discovery begins.

Commerce

Bring **marketplaces, retail media, affiliate and performance** partners into one plan.

Fulfilment

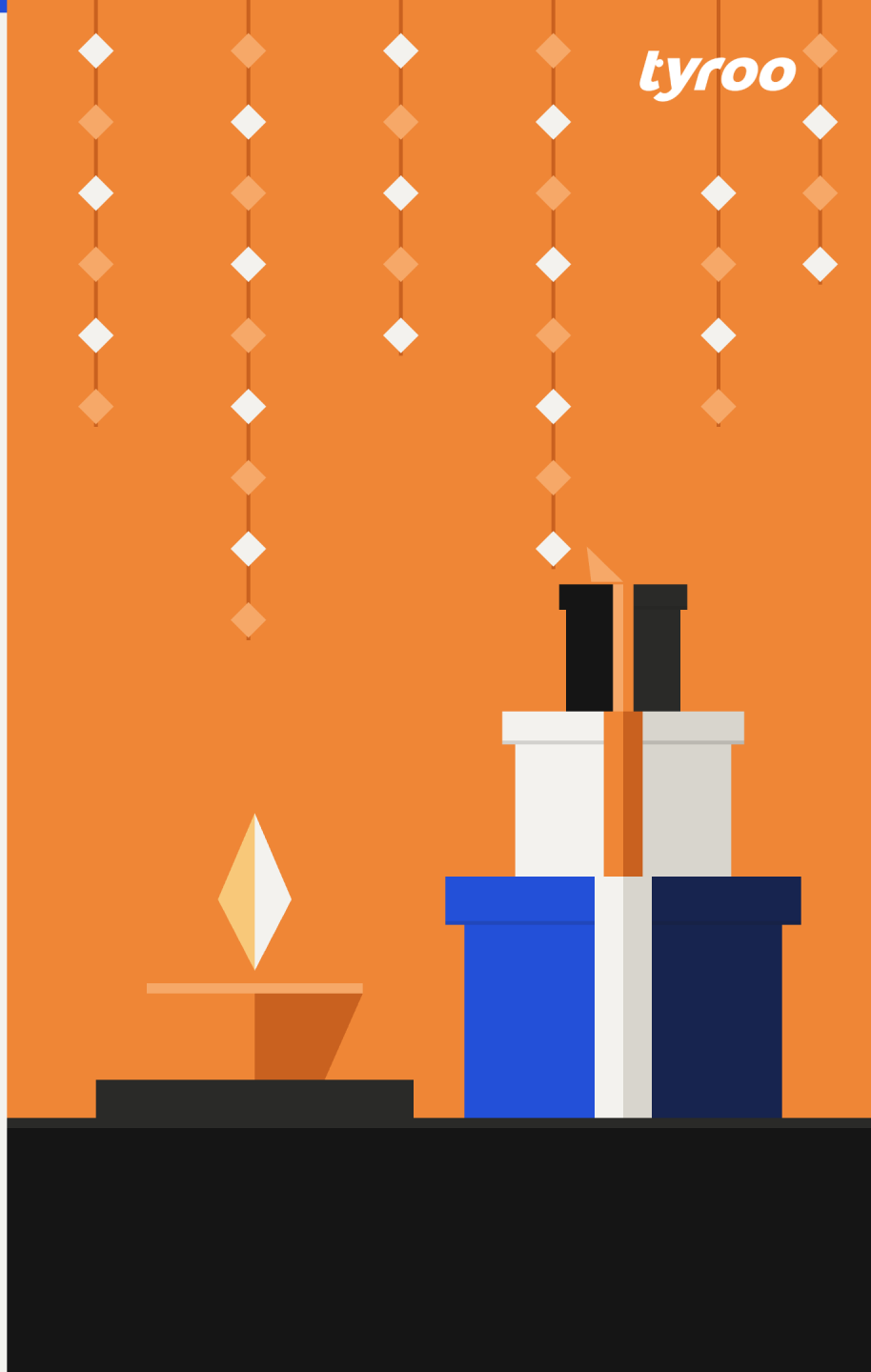
Make **inventory, delivery and real-time payments** part of the customer promise.

Measurement

Understand **which touchpoints built the decision** – not just the final click.

The season is longer.
The journey is more distributed.
The moments are more local.

The brands that win 2026 will plan for the full runway, localise each moment, connect discovery to checkout – and measure what actually built the decision.



The festive runway is already open.

Build your next success story with tyroo

Reach us at marketing@tyroo.com