



FOR IMMEDIATE RELEASE

Vertex Commerce Study: Off-Peak Shopping Trends Demand Smarter Tax Tech for Retailers

As 85% of consumers begin summer shopping in late winter, businesses face a new peak season – and a growing need for automated tax technology to manage product complexity and compliance.

King of Prussia, PA – August 26, 2025 – [Vertex Inc.](#) (NASDAQ:VERX) (“Vertex” or the “Company”), a global provider of indirect tax solutions, announced the results of its summer consumer tax survey, highlighting a spike in retail and e-commerce activity during what were historically considered off-peak seasons — revealing the emergence of new peak shopping busy periods for businesses and tax professionals to manage.

While the traditional peak shopping season runs from Thanksgiving through Christmas Eve, retail activity has expanded beyond the holidays. Summer travel and recreation, back-to-school shopping and the Halloween rush for costumes have contributed to new off-peak periods of heightened consumer demand.

One factor driving this shift is consumers’ response to an unpredictable economic landscape. Concerns about price increases and product availability are prompting more than half (53%) of consumers to purchase items earlier to avoid rising costs. That same majority is also changing how and where they shop to take advantage of sales and tax-free savings, particularly Millennials and Gen Z.

These seasonal retail shifts are reshaping how businesses prepare for peak shopping periods. To maintain a frictionless checkout experience across in-store and e-commerce channels, [automated tax technology](#) is essential. The latest Vertex survey reveals why: during summer, 76% of consumers purchase summer clothing and accessories, 71% shop for summer hobbies, 65% buy sunscreen, 41% pick up beach gear and 34% purchase water toys. For businesses to remain compliant, the need for precision and speed in tax operations becomes paramount. Automated tax platforms reduce friction during merchandise transitions by ensuring every Stock Keeping Unit (SKU) is taxed accurately under current regulations while minimizing errors, accelerating product mapping and supporting compliance — making them essential to high-volume retail operations.

Other key findings include:

- **Consumers want a blended shopping experience:** 55% of consumers prefer to shop for their favorite summer items both in-store and online, outranking online-only shoppers by 34%, indicating that businesses must ensure efficiency and accuracy across platforms.
- **It’s all about the deals:** 69% of consumers shop during summer holiday weekend sales when many seasonal items are discounted, from flip-flops to fire pits. While great for consumers, these promotions can challenge retailers, making it critical to automatically update tax rates and maintain compliance.

“Consumer-facing businesses are already navigating a complicated landscape in 2025. They shouldn’t also have to worry about whether their technology solutions and tax tools are equipped to handle the influx of activity around peak summer shopping and seasonal promotions,” said Sal Visca, Vertex Chief Technology Officer. “Vertex supports its retail customers through all transactional peaks and valleys, so

they can rest assured that whether they're scaling seasonal promotions or managing steady day-to-day operations, they have a trusted partner ensuring every transaction and tax amount is accurate and compliant."

To learn more about Vertex and its indirect tax and compliance [solutions for e-commerce](#) and more, visit www.vertexinc.com.

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Notes to the Editors

Additional information and background:

FAQs

Why are seasonal retail moments a compliance headache for businesses?

- Seasonal shopping spikes introduce complex tax challenges. Tax rates and rules vary by state, county, city and district, and can change at any time. One misstep can lead to audit risk or worse, a frustrating customer experience leading to lost revenue. Automated tax tools help businesses instantly automatically update rates and rules, apply exemptions accurately, and maintain smooth checkout experiences consistently across all sales channels during high-traffic periods.

How do promotions, tax holidays, and sales spikes affect compliance?

- Short, high-volume sales windows compress operational timelines and increase the risk of errors. Businesses benefit from automated tax engines that:
 - Update rates and rules in real time across jurisdictions
 - Apply correct product tax treatment at checkout (online and POS)
 - Handle exemptions and sales tax holidays consistently to avoid over/under collection
 - Scale reliably from hundreds to millions of transactions without sacrificing accuracy

What tax challenges come with omnichannel shopping?

- Sourcing and timing drive most errors, and different fulfillment methods may trigger varying tax rules. Store pickup uses the store's location, while delivery uses the destination. Promotions and bundles require accurate discount allocation, and returns must reflect the original tax rate. A unified automated tax solution ensures accuracy across channels and handles high volumes without disruption. Tools such as [Vertex O Series for Retail](#) and [Vertex E-Commerce Sales Tax](#) solutions help retailers manage these complexities and support compliance across every channel.

About the Survey

This survey was conducted via Dynata and polled 1,000 general U.S.-based consumers over 18 years of age in June 2025. Respondents were segmented and analyzed across age groups, gender, marital status, having children, and household income. For complete survey methodology, please email vertex@pancomm.com.

About Vertex

Vertex, Inc. is a leading global provider of indirect tax solutions. The Company's mission is to deliver the most trusted tax technology enabling global businesses to transact, comply and grow with confidence. Vertex provides solutions that can be tailored to specific industries for major lines of indirect tax, including sales and consumer use, value added and payroll. Headquartered in North America, and with offices in South America and Europe, Vertex empowers the world's leading brands to simplify the complexity of continuous compliance.

For more information, visit www.vertexinc.com or follow us on [X](#) and [LinkedIn](#).

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