

The 2025 Q4 Strategy Playbook - Holiday Hustle



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The spotlight is blazing, the competition is ruthless, and every scroll, search, and swipe is a battle for attention. **This is Q4 in Europe.**

Unlike the US, where Black Friday and Cyber Monday dominate, Europe's holiday season is a patchwork of peaks, traditions, and shopper behaviors. From Singles' Day heating up in Western Europe, to St. Nicholas Day in DACH, to January sales fueling Southern Europe, there's no single moment to win — there are dozens.

This year, **the challenge isn't just selling — it's being seen.** Consumers are more cautious, more value-driven, and more digitally savvy than ever. The brands that break through won't just compete on price — they'll compete on **discovery, relevance, and speed.**

Holiday sales are forecast to top **€800 billion**, but the real prize is visibility: who captures the shopper in the feed, in search, and on retail media. In Q4 2025, those that master the fight for attention will master the cart.

This playbook gives you the trends, insights, and market-specific strategies you need to cut through the noise and win across Europe's most fragmented, high-stakes quarter.



Cautious Optimism

Europeans are heading into the holiday season with **cautious optimism**: Mastercard projects holiday spending across Europe will rise about **2.9% year-over-year**, while a McKinsey survey **shows 70% of consumers plan to spend the same or more than last year**, five points higher than in the U.S. Yet, price sensitivity is still strong—**73% report paying higher prices in 2024**, and **50% say they will cut back this Christmas**, with **64% considering second-hand purchases** to stretch budgets.

Consumer behavior is splitting into two groups: a price-sensitive segment reducing spend by **~35%**, and a resilient group increasing spend by **~22%**, often on premium goods.

Shoppers are also more deal-focused, leaning into **Black Friday promotions** and starting their shopping earlier, while omnichannel habits—blending online convenience with in-store experiences—are entrenched. Younger generations are more likely to **splurge on apparel, electronics, and toys**, while older shoppers lean toward experiences.



Europeans are shopping strategically—balancing value-hunting and premium splurges—making flexibility, targeted promotions, and omnichannel strength critical for retailers.



Europe's Holiday Battlefield

There isn't one holiday peak in Europe — there are many. From Black Friday to Orthodox Christmas, the calendar is a gauntlet.

- **Western Europe** – Black Friday rules, Singles' Day is surging
- **DACH** – St. Nicholas and Christmas dominate gift giving
- **Southern Europe** – Sales stretch deep into January
- **Eastern Europe** – Orthodox Christmas pushes demand into the new year.

There is no single finish line. Winning Q4 in Europe means running – and winning – multiple races.



Quantifying the Holiday Shopping Landscape

European holiday shopping is now defined by an expanded calendar that begins months before December and stretches well into the new year. In the UK, according to Storyly, 69% of consumers had started shopping by August and 85% by October, while some retailers launched Christmas promotions as early as July. Euronews quoted that Black Friday and Cyber Monday still dominate, with sales up 175% and 58% respectively versus a normal day, and around 60% of Europeans waiting for these deals, especially for big-ticket items like electronics and fashion. Yet differences emerge by market: Germans spend the most per person (~€251) and often use Black Friday for stocking fillers, while Italians and the French lean less on these events, preferring other parts of the season. Sustainability is also a key filter, with 38% buying only what they need and nearly a third avoiding impulse or return-prone purchases.



Europe's holiday shopping is longer, more fragmented, and more value-driven than ever, demanding **flexible, country-specific media approaches** that balance price-consciousness with targeted premium and experience-led messaging. A layered media strategy that includes early outreach, peak Black Friday/Cyber Monday bursts and country specific messaging will most effectively capture the evolving shopping patterns of Europeans in 2025.

Multi-Phase, Localized Strategies for a Longer Season

To make the most of Europe's extended holiday season, campaigns need to begin much earlier than in the past. In **summer and early fall (July–October)**, awareness activity is key. Channels such as CTV, YouTube, TikTok, and retail media networks are well-suited for reaching early planners, particularly in markets like the UK where shoppers start by August. Creative should emphasize essentials, bundles, and early “Christmas in July” or October sales, ensuring brands are top of mind before the promotional peaks hit.

The **Cyber Five period (late November)** remains the centerpiece of holiday shopping across Europe, but media tactics should be localized. Investment should surge into paid search, social platforms, and programmatic bursts to capture high-intent buyers. In **Germany**, where consumers spend the most per person, mobile-first and deal-driven creative works best. In the **UK**, positioning premium gifting and indulgence categories is most effective, while in **France and Italy**, budgets should be spread more evenly, with campaigns that carry momentum beyond Cyber Five into December.

The **December run-up (Dec 1–21)** plays a particularly important role in Southern Europe, where gifting peaks later. Advertisers should sustain visibility with always-on campaigns, supported by in-store traffic ads and omnichannel activations. Creative should highlight value and sustainability, reflecting consumer caution—**38% of Europeans report buying only what they need**. Social storytelling and shoppable content can inspire gift purchases, especially for last-minute buyers.



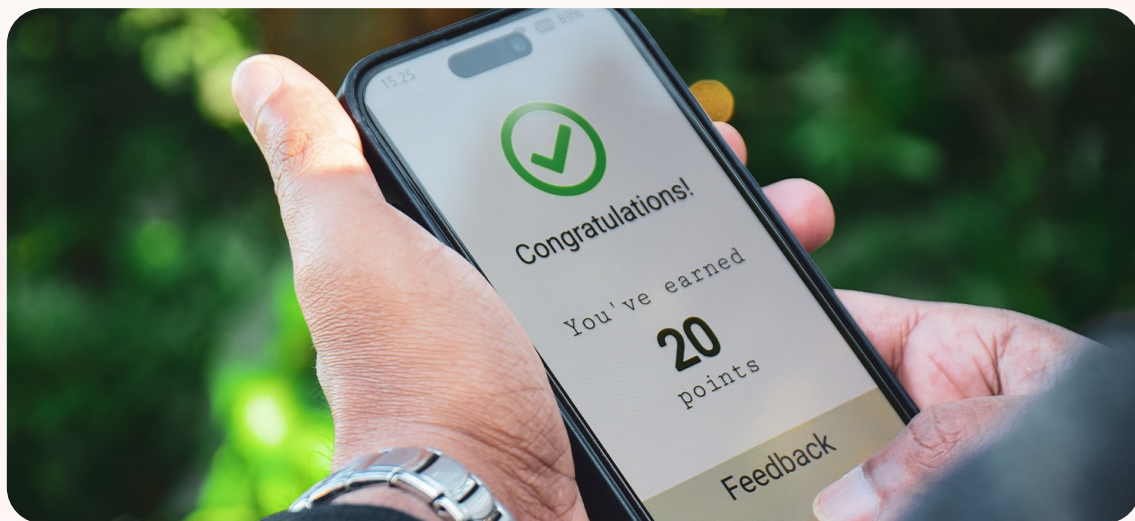
Finally, the **Q5 window (Dec 22–Jan 7)** is an underutilized but highly efficient phase. Ad costs typically fall by about **25%**, while efficiency improves by **13%**, making this period ideal for performance-driven campaigns. High viewership during major sports events on linear TV and CTV further amplifies reach. Brands in wellness, finance, and subscription services often see this period outperform even Black Friday, making it a valuable close to the season.



Europe's media landscape requires **multi-phase, localized strategies**—start early in the UK, surge at Cyber Five in Germany and Northern Europe, sustain through December in France and Italy, and unlock efficient growth in Q5 across the region.

Winning Tactics for Q4 2025: Retail Media

In 2025, retail media will be indispensable for holiday success in Europe. It ensures brands are visible at the moment of purchase, supports campaigns across an extended and fragmented shopping calendar, and provides closed-loop accountability that traditional media cannot. To maximize impact, advertisers should integrate retail media as a core layer in their holiday mix—front-loading awareness in summer, doubling down on Cyber Five, sustaining visibility in December, and riding the efficient Q5 post-holiday window.



What makes retail media especially powerful is its access to first-party shopper data. Retail media networks use loyalty programs, transaction histories, and SKU-level insights to target verified shoppers with precision and relevance. In the UK, **Tesco's** dunnhumby-powered platform and **Sainsbury's Nectar360** can segment shoppers by category and spend level. In Germany, **Otto** and **Zalando** leverage purchase intent and fashion preferences, while **MediaMarktSaturn** captures electronics buyers primed for Black Friday deals. **Carrefour** in France and **Esselunga** in Italy extend this advantage through omnichannel loyalty ecosystems that link online behavior with in-store receipts. In Eastern Europe, Allegro and Mall Group media use marketplace-level transaction data to scale ecommerce campaigns where online growth is strongest (+11% YoY).

This **first-party data advantage** makes retail media not only a performance driver but also a brand-building tool across the elongated holiday journey. Brands can use RMNs to seed awareness with new audiences in summer, retarget engaged shoppers in fall, convert deal-seekers during Cyber Five, and re-engage post-holiday with efficiency.



Retail media is no longer a tactical add-on in Europe. It is becoming the centrepiece of holiday commerce media strategy, where first-party data ensures relevance, accountability, and measurable sales outcomes. Advertisers who fully embed retail media across the calendar – while tailoring by country and category – will be best positioned to capture Europe's evolving holiday demand in 2025.



Connected TV

CTV in Europe has shifted from an emerging format to a mainstream, must-have channel. Adoption is accelerating as cord-cutting spreads and streaming consolidates. Ofcom reports that 79% of UK households use at least one subscription or ad-supported streaming service, while in Germany, nearly 60% of TV households now access content via smart TVs. Platforms like YouTube, Netflix (with its ad-supported tier), Amazon Prime Video, Disney+, and RTL+ dominate viewing time, with regional broadcasters (e.g., ITVX in the UK, Joyn in Germany, Salto in France) scaling their own ad-funded offerings. The European IAB estimates digital video ad spend will grow in the low double digits through 2025, with CTV capturing the fastest share of that growth.

As in the U.S., premium live sports and tentpole programming are reshaping the CTV value proposition in Europe. Amazon Prime Video has rights to the UEFA Champions League in Germany and Italy and Premier League matches in the UK, while broadcasters like DAZN, Sky, and Canal+ are anchoring festive-season sports viewing. Holiday CTV consumption spikes alongside cultural tentpoles—Christmas specials, family films, and marquee football fixtures—making Q4 inventory highly competitive.



In Europe, CTV has moved from experiential to essential for the 2025 holiday season. Advertisers who secure premium inventory early – especially around live sports and cultural programming- and integrate retail media audiences will create a powerful full-funnel strategy with broad reach, cultural relevance and measurable sales impact across the holiday calendar.

Social & Influencers

In Europe, social platforms have become primary storefronts, especially for younger demographics. Social commerce adoption is growing fastest among Gen Z and millennials, with Salesforce showing that 76% of Gen Z say social influenced a purchase, and they are twice as likely as older groups to buy gifts via social channels.

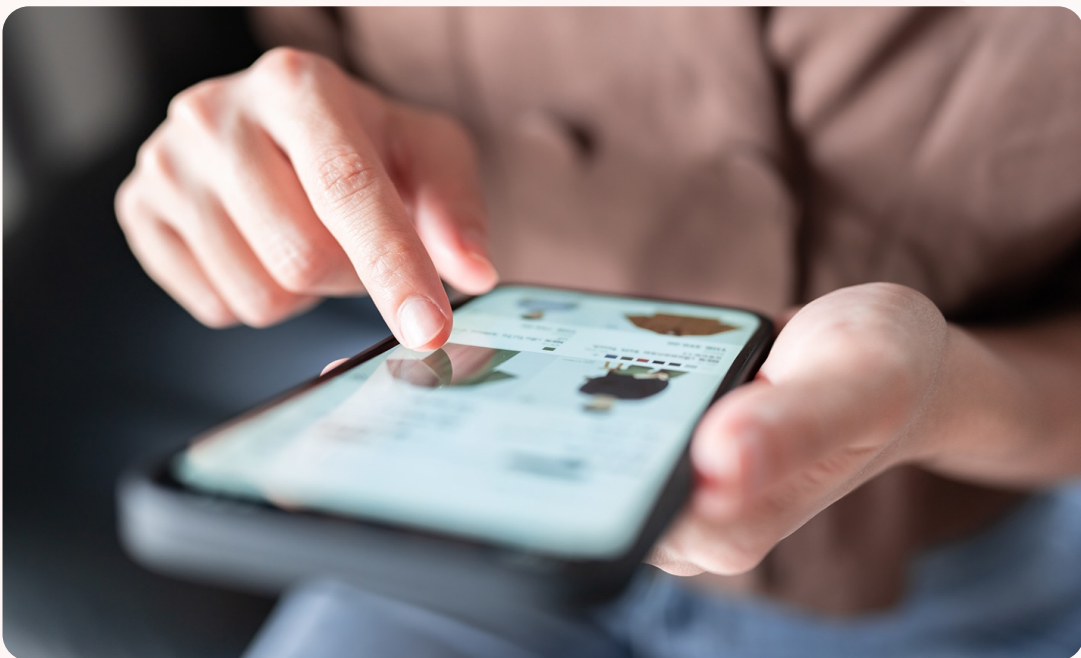
Platform dynamics vary by country:

- Instagram and Facebook remain strong discovery and conversion drivers across Western Europe, with 44% of consumers using Instagram for product discovery.
- TikTok's influence is surging, particularly in the UK, France, and Southern Europe, where nearly 70% of Gen Z discover products on TikTok and almost half cite it as their top research tool.
- YouTube is a dominant influence channel in Germany and Eastern Europe, blending long-form discovery with shoppable video.
- Regional platforms like VKontakte in Eastern Europe and Pinterest in the UK and France also support holiday discovery, especially for gifting inspiration.



Mobile

In Europe, mobile devices now account for an estimated 60% or more of all e-commerce transactions—a share expected to grow further with mobile driving an expected 78% of e-commerce traffic by 2025. Additionally, 70% (Cross-Boarder E-commerce Magazine) of purchases are projected to occur via mobile apps rather than mobile.



Consumers prefer mobile for its speed and convenience. App users view 4.2 times more products per session than mobile-web users and convert at three times the rate; plus, app cart abandonment is only 20% compared to 68% on desktop and 97% on mobile web.

Mobile will be the engine of holiday retail in 2025, with most e-commerce sales happening on smartphones. **Apps convert three times better than mobile web** and have far lower cart abandonment, making them critical for holiday success. Retailers should focus on **app-first experiences** with push notifications, personalized offers, and fast checkout, while leaning into mobile during **peak periods like Black Friday and Q5**, when speed and convenience capture the most demand.



In 2025, mobile—especially apps—will dominate holiday retail, driving higher conversions and lower abandonment, making mobile-first strategies essential during peak periods like Black Friday and Q5.



AI + First-Party Data = Competitive Edge

In Europe's 2025 holiday season, **AI combined with first-party data** will give brands a decisive advantage by sharpening forecasting and operations. Predictive models will help anticipate demand surges, optimize inventory, and automate creative output—ensuring products and messages align with real consumer intent. This improves efficiency and reduces costly mismatches across a longer, more fragmented holiday calendar.

For consumers, the value lies in **personalization at scale**. First-party data powers AI-driven recommendations, dynamic promotions, and proactive chat support that create more relevant, frictionless shopping experiences. With third-party cookies fading and European privacy rules tightening, brands that own and activate their data can boost engagement, loyalty, and conversions while staying compliant.

Holiday-specific adoption of AI is also accelerating. Salesforce reports a **25% rise in AI tool usage during the holidays**, with nearly **1 in 5 purchases influenced by AI-led recommendations or service**. Together, AI and first-party data enable brands to deliver smarter, privacy-safe experiences that drive measurable results—offering a clear competitive edge in Europe's most critical shopping season.

- ★ AI powered by first-party data will give European brands a holiday edge in 2025 by enabling smarter forecasting, hyper-personalized experiences, and privacy-safe measurement that drive stronger conversions.

About DAC

Founded in 1972, DAC is an international full-funnel media agency with over 600 employees and 12 offices across the United States, Canada and Europe. We connect brands with customers at every stage of their journey with enterprise-to-local strategies powered by proprietary technology.

Our team of experts help brands achieve awareness and performance both globally and locally through our innovative solutions across paid media, SEO, content strategy, local presence management, reputation management and data analytics.

DAC’s campaigns drive unmatched outcomes for our clients, earning us Google’s 2024 Agency Excellence Award, U.S. Agency Awards 2024 Integrated Search Agency of the Year, and Digiday Media Buying & Planning Awards 2025 Most Innovative Independent Agency.

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