

The 2025 Q4 Strategy Playbook

Winning in a Shifting US Holiday Market



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The holiday spotlight is on, the stage is crowded, and every click is a coin toss between you and your competitors. **Welcome to Q4.**

Q4 2025 isn't just another peak season. It's retail's main stage, where winners break records and laggards fade fast. Shoppers are savvier, wallets are tighter, and scrolls move faster than ever. **According to Insider Intelligence/eMarketer, holiday sales are projected to hit \$1.36 trillion, but the real battle won't just be over spend — it'll be over digital discovery.** The brands that capture attention in the feed, in search, and in retail media will be the ones that capture the cart.

This playbook brings together the top trends, insights, and fresh data shaping the season so you can focus on what matters most: **creating strategies that win.**

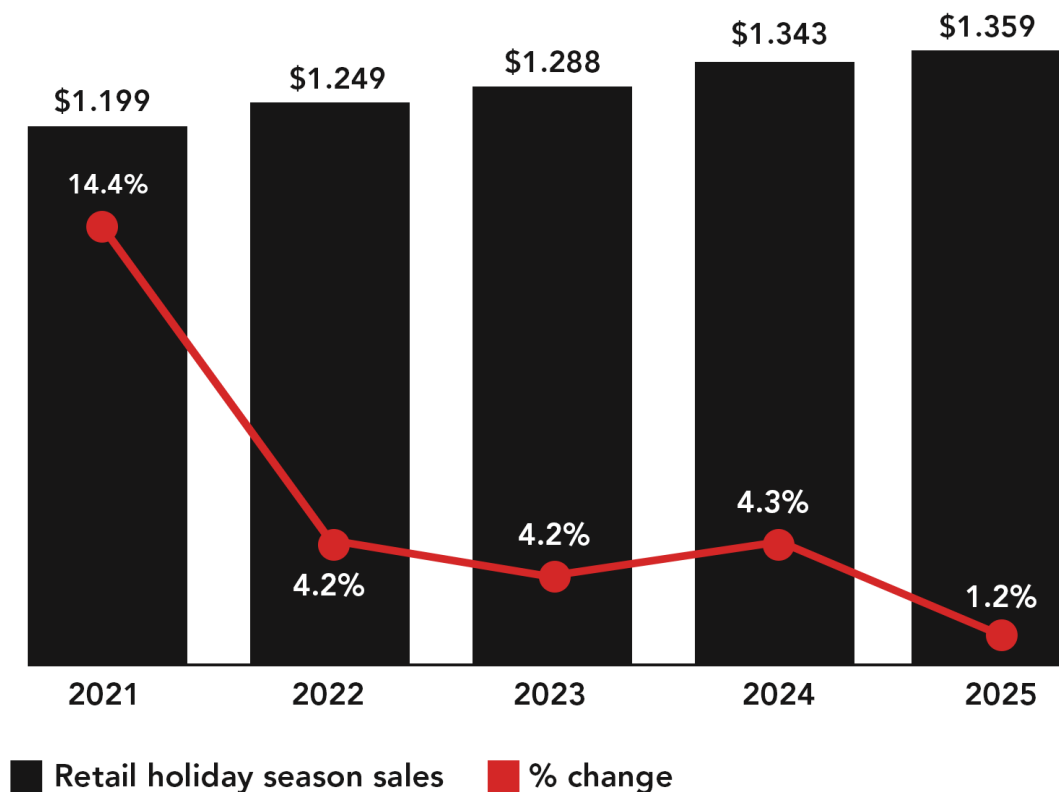


Consumers are more intentional

Shoppers are pulling back and making sharper choices. eMarketer reports that 47% of consumers plan to buy fewer or less expensive gifts because of tariffs, and 70 percent say they will cut back further if prices rise. The same cautious mindset shows up in GWI's Retail Trends 2025 report, where 79% of global consumers describe themselves as careful spenders, and two thirds say they wait for products to go on sale.

The message is clear: people are pulling back spend and are being more deliberate with their purchases. Every purchase has to feel worth it.

Trillions in US retail holiday season sales and % change (2021 - 2025)



Focus your creative on value and trust. Discounts and financing are powerful, but they land best when paired with assurances of durability, quality, and convenience.

The holiday calendar has expanded

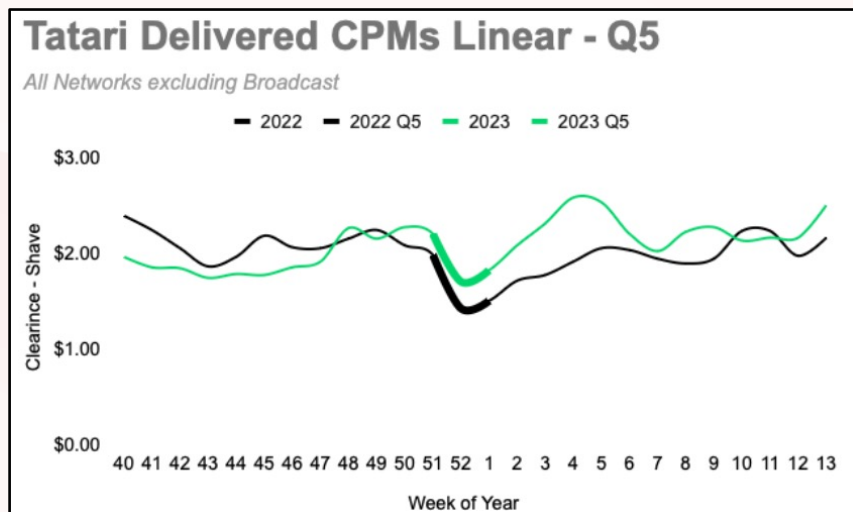
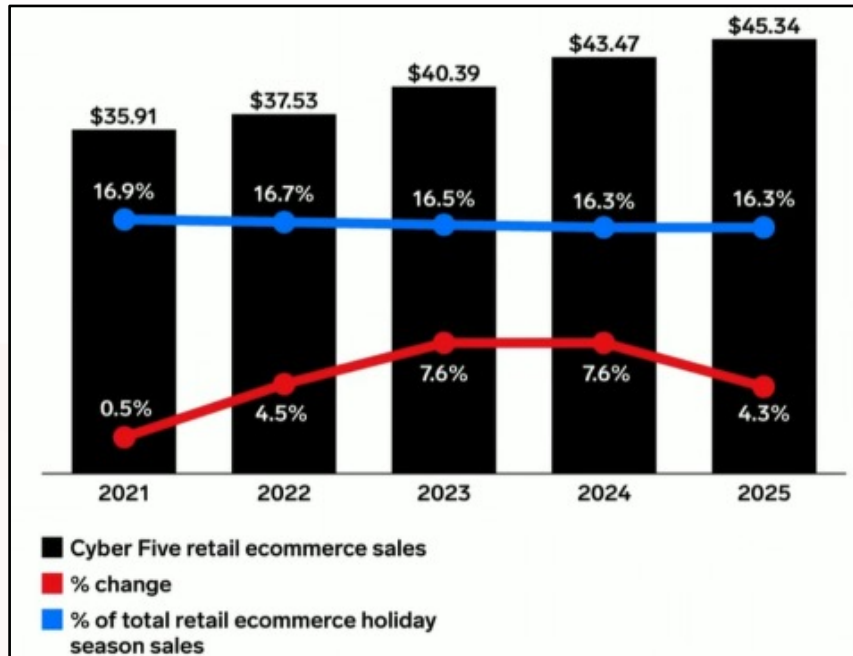
Black Friday still matters, but it no longer defines the season. The holiday calendar is expanding, creating multiple opportunities to engage. **eMarketer notes that 21% of shoppers began holiday shopping as early as summer 2025, up from 16% in 2024, thanks to "Christmas in July" promos and Amazon's October sales events.**

That being said, shoppers look to stock up on essentials during these early promotional events, whereas Cyber Five still holds its share of dominance for holiday shoppers, with eMarketer forecasting sales during the period will grow 4.3% against overall holiday e-commerce.

There is also opportunity after the holidays. Tatari points to the "Q5" window - the period from December 22 into early January - as an underused moment. **During this stretch, ad costs fall by about 25% while efficiency improves by roughly 13%, thanks to reduced competition and high TV viewership around NFL, NCAA, and NBA games.** For health, wellness, and financial services brands, Q5 often performs even better than Black Friday.



Don't just plan for Cyber Week. With shoppers being more deliberate and intentional, it is key to build awareness early. Early activation (Oct - early Nov) ensures shoppers are primed and retargeting ready. Lean into CTV and social to grab attention and enhance product discovery. Use the high promo periods to lock in primed shoppers. Consider holding budget for Q5 efficiency plays when impressions are cheaper and attention is high.





**The media mix
is about precision,
not volume.**

Retail Media

Retail media has become the digital shelf talker at scale. **eMarketer expects U.S. spend to surpass \$62 billion in 2025, with Amazon leading and Walmart, Target, and Instacart rapidly expanding.**

The differentiator is first-party data. Retailers' logged-in environments allow advertisers to target with purchase history and loyalty insights rather than modeled segments. Shopify reports that return shoppers grew 59% year over year, and mobile purchase volume increased 44% since 2022, highlighting the value of re-engaging known customers.

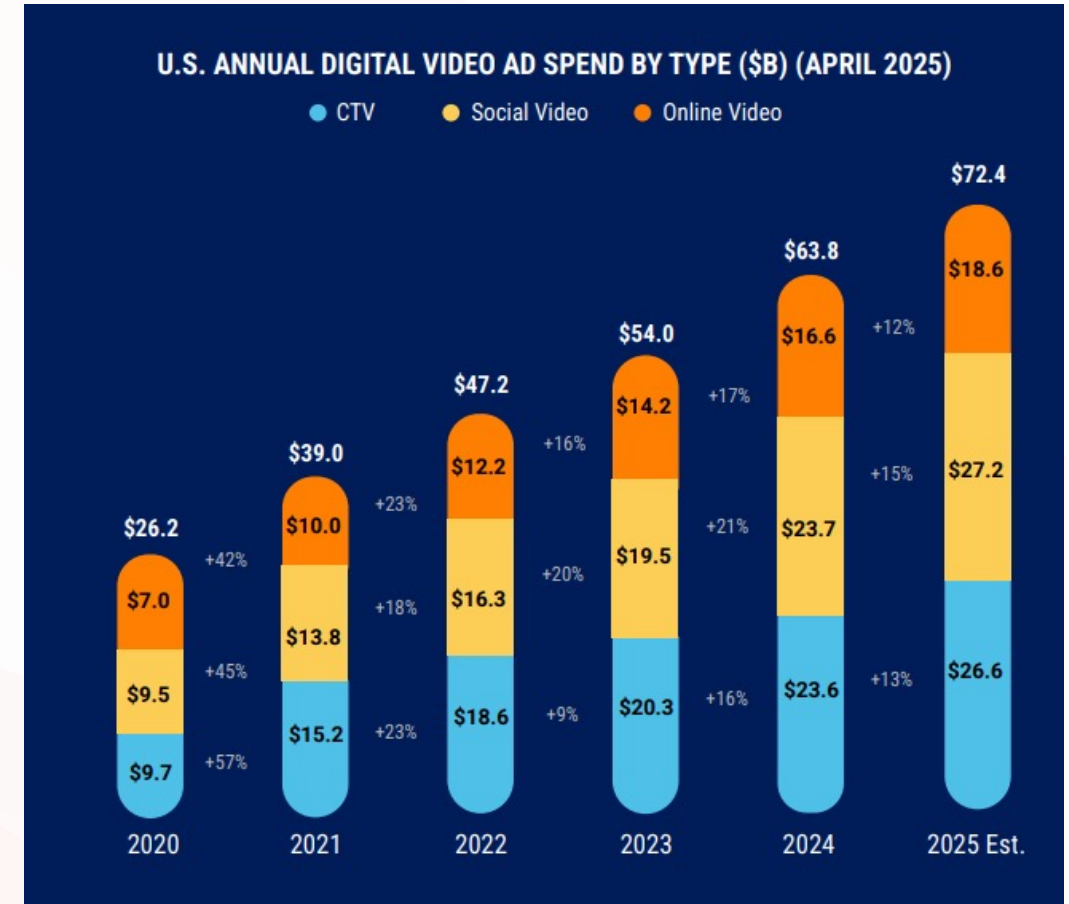
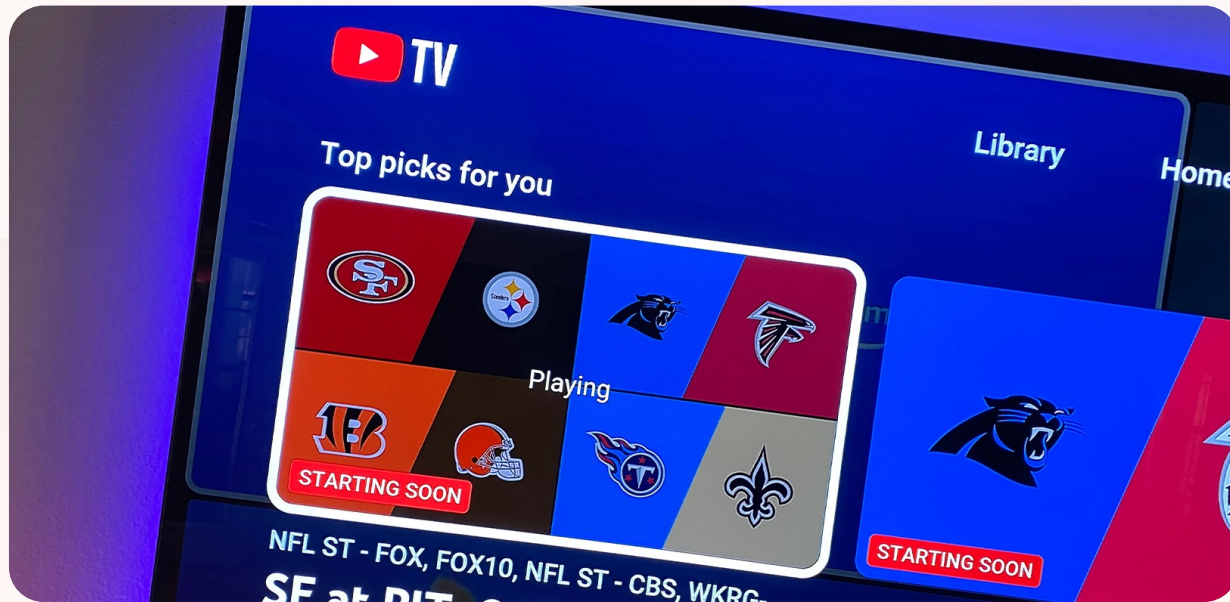
The recent [Macy's Media Network pilot](#) with Amazon's Retail Ad Service could strengthen Amazon as a retail media giant, and provides marketers an opportunity to centralize campaign architecture with unified buying across both 1P data partners, leveraging insights from both Macy's and Amazon shoppers. If successful, this could pave the way for more retail media partnerships in the future and removing siloed 1P audience activations.



Invest in retail media as a bottom-funnel engine. Use first-party targeting to reconnect with loyal buyers, exclude them from prospecting lists, and prove incrementality with closed-loop reporting.

Connected TV

CTV has moved from experimental to essential. The IAB projects U.S. CTV ad spend will hit \$26.6 billion in 2025, a 13% increase, while digital video overall will reach \$72.4 billion, up 14 percent. Nielsen shows that nearly three quarters of all TV viewing is now ad-supported, with YouTube holding around 25% of U.S. streaming minutes and Amazon Prime Video gaining share through live sports.

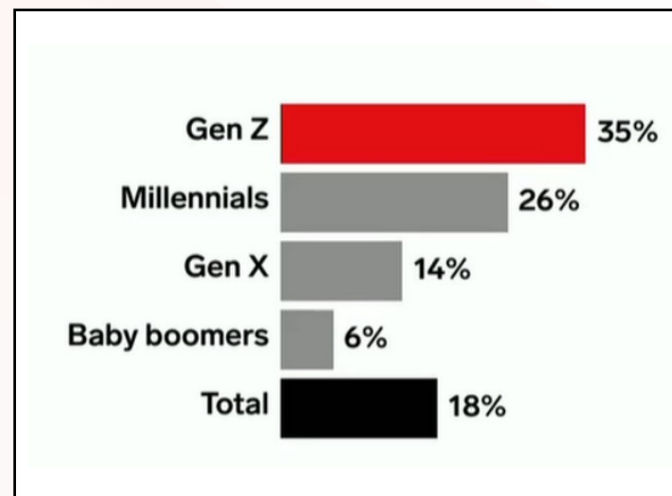


- ★ Secure premium CTV inventory early. Sports and tentpole programming drive both reach and cultural impact, and pairing those buys with retail media audiences creates a full-funnel connection.



Social and influencers

The scroll has become the storefront. Marketing Dive reports global social ad spend will grow 12% in 2025, and 59% of marketers plan to increase influencer partnerships. 76% of Gen Z say social influenced a purchase, while GWI notes that 44% of consumers use Instagram and 25 percent use TikTok for product discovery. When surveying Gen Z specifically, eMarketer found that Gen Z is twice as likely to purchase gifts on social, with ~70% of them citing they discover products on TikTok and nearly half find it the most useful platform for product research.



Approach social as a discovery channel first. Prioritize creators and shoppable formats that bridge inspiration and checkout in a single step.

Mobile & Omnichannel: The Growth Backbone

Mobile is not just winning, it is driving nearly all growth.

eMarketer expects 56.5% of holiday ecommerce sales in 2025 to come from mobile, accounting for more than 90% of ecommerce growth. Shopify confirms that mobile is now the top device for orders, and GWI highlights that 38% of consumers buy online and pick up in store.

- ★ Optimize every journey for mobile. Checkout should be frictionless, fulfillment flexible, and loyalty programs connected across channels. Consumers do not distinguish between digital and physical; they expect a seamless experience.

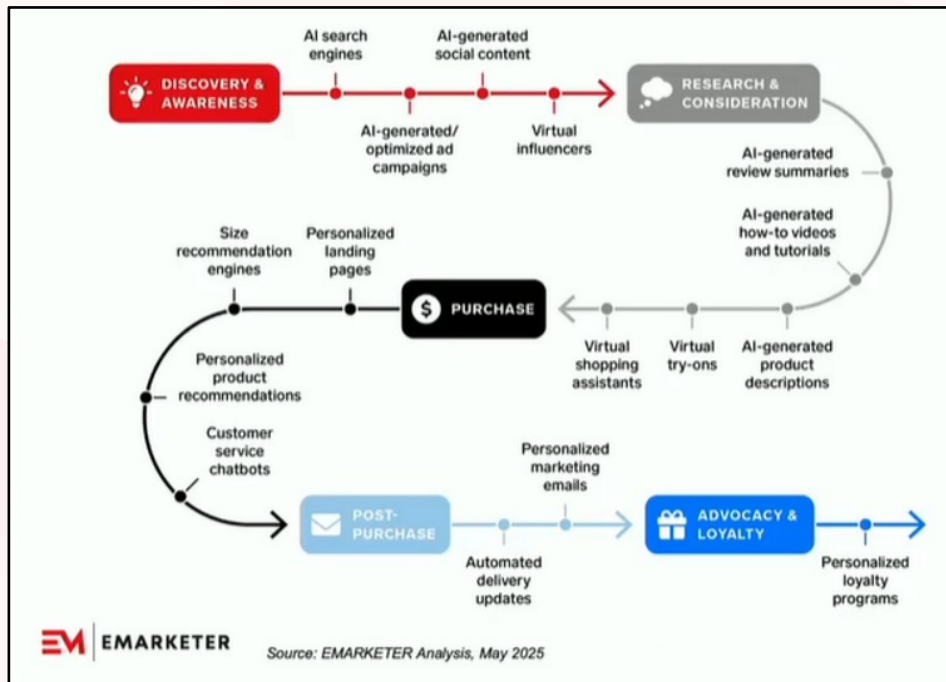




AI + First-Party Data = Competitive Edge

AI is no longer experimental; it's foundational. MarketingDive reports **71% of marketers plan to invest at least \$10 million in AI over the next three years**, up from 57% in 2024.

GWI found that **26% of consumers want customized products and 42% expect brands to act on feedback**. Shopify demonstrates how combining AI with first-party identity resolution can cut customer acquisition costs by up to 50%, while doubling retargeting performance. eMarketer reported that AI-driven traffic to retailer sites is increasing, and that gift shopping offers a top opportunity for genAI tools to demonstrate their influence, citing that 56% of Gen Z think AI tools are valuable for holiday shopping. The below graphic ideates what an AI-influenced purchase journey could look like.



- ★ Deploy dynamic discounts, bundles, or exclusive offers tied to 1P audience insights. Activate these audiences in retail media, CTV, and social campaigns for maximum efficiency and incrementality. Ensure webpages AI optimized, following AIEO best practices.

Conclusion: Steady Growth, Stronger Share

Yes, 2025 holiday growth will be steadier than years past. But that creates room for agile planners to seize disproportionate share. Consumers are still spending — they're just rewarding brands that deliver value, trust, and convenience.

The opportunity for Q4 2025 is clear:

- **Highlight value and durability in every message.**
- **Activate earlier (October) and later (Q5), not just Cyber Week.**
- **Prioritize precision channels like retail media, CTV, and social creators.**
- **Double down on mobile and omnichannel, where most growth is happening.**
- **Unify AI with first-party data to unlock personalization at scale.**

Brands that embrace these shifts won't just weather a slower economy — they'll win loyalty, efficiency, and market share that carries into 2026.



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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