

Adobe Digital Insights



2025 UK Holiday Shopping Forecast



Methodology

The Adobe Digital Economy Index (DEI) used Adobe Analytics to analyse hundreds-of-billions of visits to retail sites from UK consumers since 2019, tracking 100 million SKUs, and 18 product categories to provide the most comprehensive view of the UK digital economy. Adobe Analytics is part of Adobe Experience Cloud, relied upon by major retailers to deliver, measure, and personalise shopping experiences online.

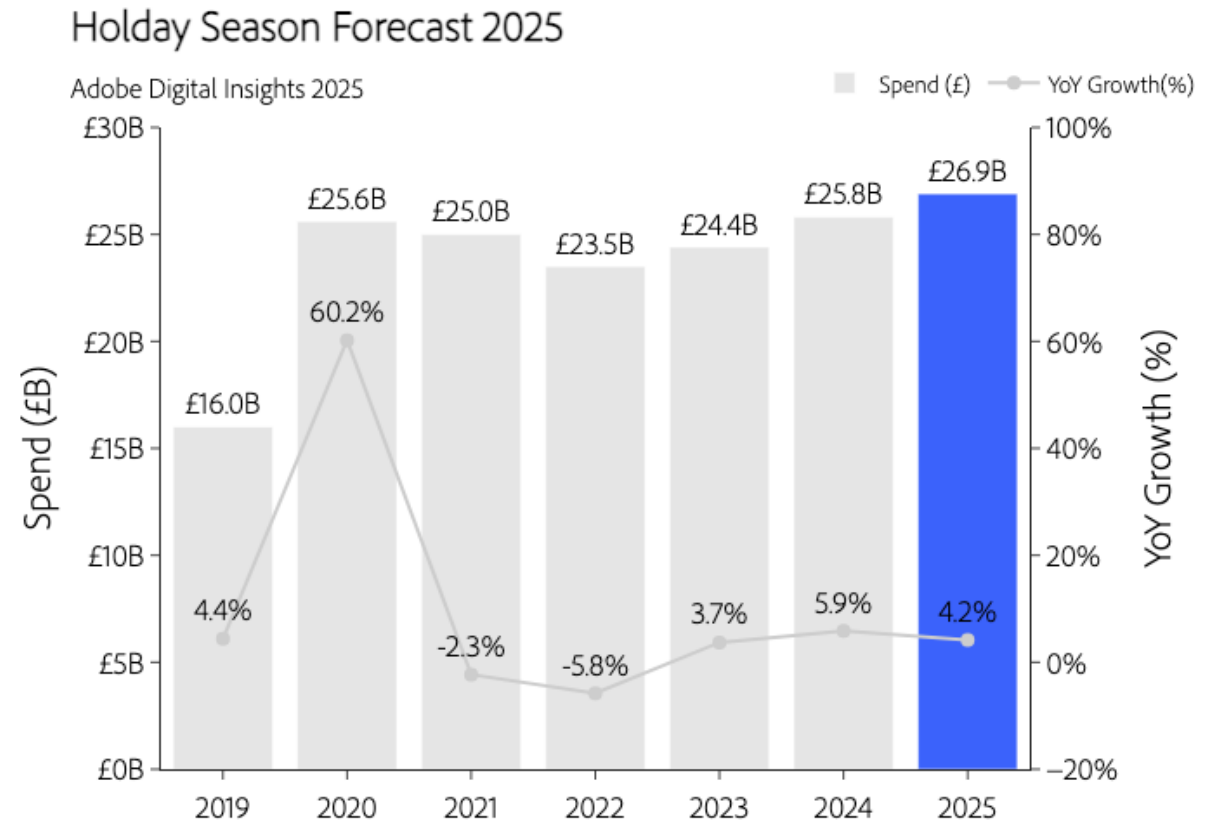


Summary Findings

- UK Online Holiday Retail Spending will reach a new record thanks to strong expected discounts and price sensitivity
- Strong referral visit and revenue share growth is expected from social networks like Instagram, YouTube, and TikTok this holiday season
- Both mobile and BNPL spend growth will outstrip topline growth and drive accelerated spending over Cyber Week
- Accelerated visit growth from Generative AI platforms is expected throughout the season and will spike on Cyber Monday, Boxing Day, and Black Friday
- Natural/Organic search is expected to dominate in terms of revenue share this season, but YoY growth is in decline
- Consumers are prioritizing cheap and standard shipping options to ensure fulfillment costs don't cut into the value they're receiving from discounts.

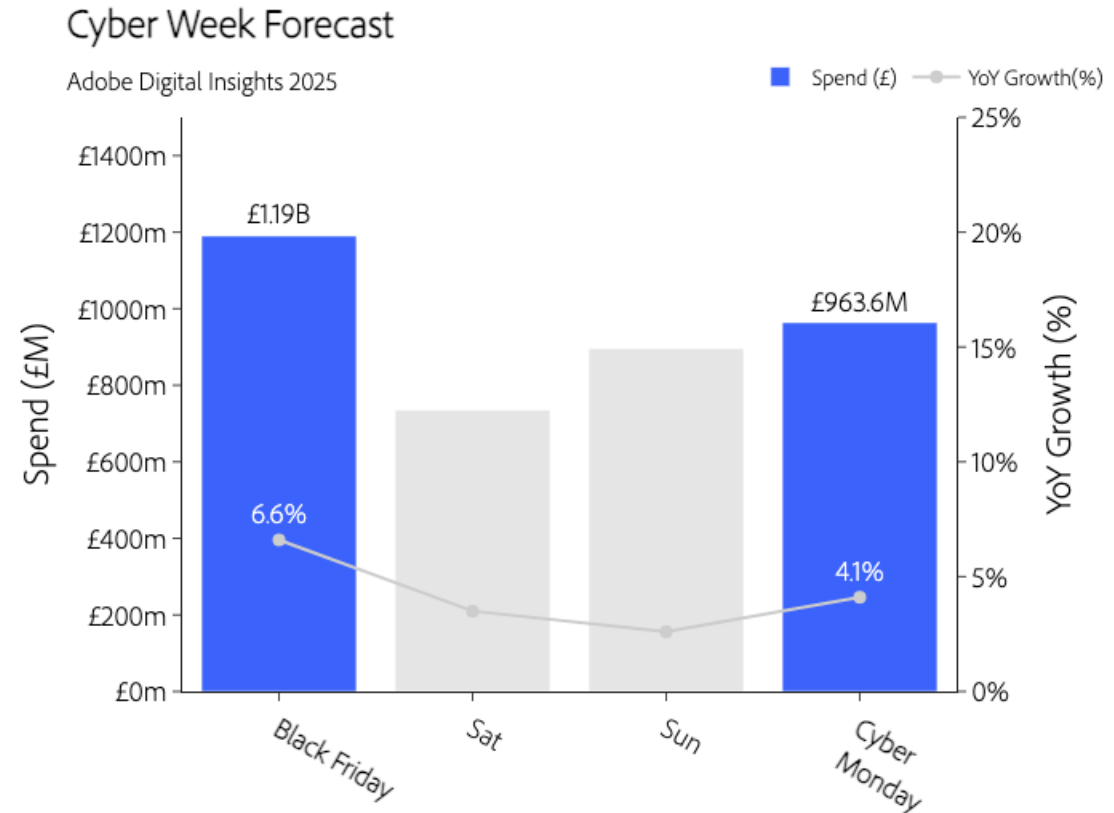
2025 Holiday Season to hit a record £26.9B!

- Adobe forecasts a record **£26.9** billion will be spent online this holiday season (Nov 1st – Dec 31st).
- Online spending growth is expected to hit **4.2%** year-on-year, with possible fluctuation between **3.3%** and **5.1%** depending on various macro-economic factors.
- We expect this season's spending to surpass the record levels set in 2024 as online holiday spending sees its third successive year of positive year-on-year growth.



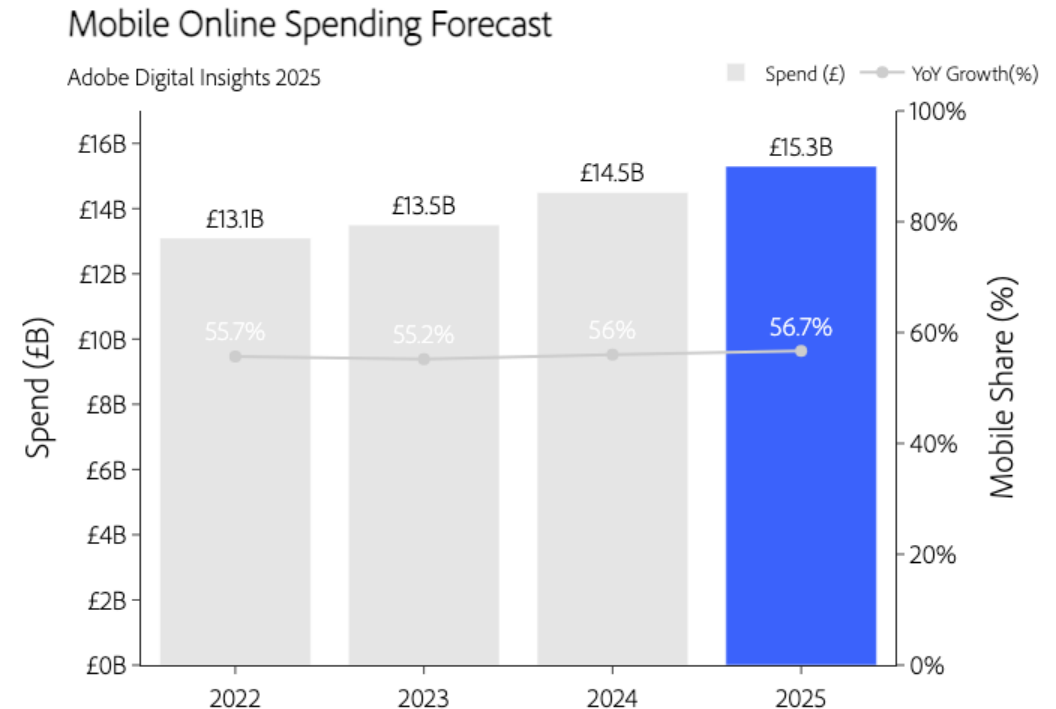
Cyber Weekend growth expected to outpace the overall holiday season

- Online spending during Cyber Weekend (Black Friday to Cyber Monday) is projected to grow **4.4% YoY** and net **£3.8 bn**, capturing **14.2%** of the season's total revenue.
- Black Friday will further assert its dominance as the biggest online shopping day of the season with **6.6% YoY** growth and **£1.19 bn** in revenue.
- Cyber Monday will take second place with **£963.6 m (4.1% YoY)** followed by Sunday, 30 Nov with **£895.8 m (2.6% YoY)**.
- Adobe also expects Boxing Day to cross the half-a-billion-pound threshold with **£510m** forecast to be spent representing **4.6% YoY** growth.



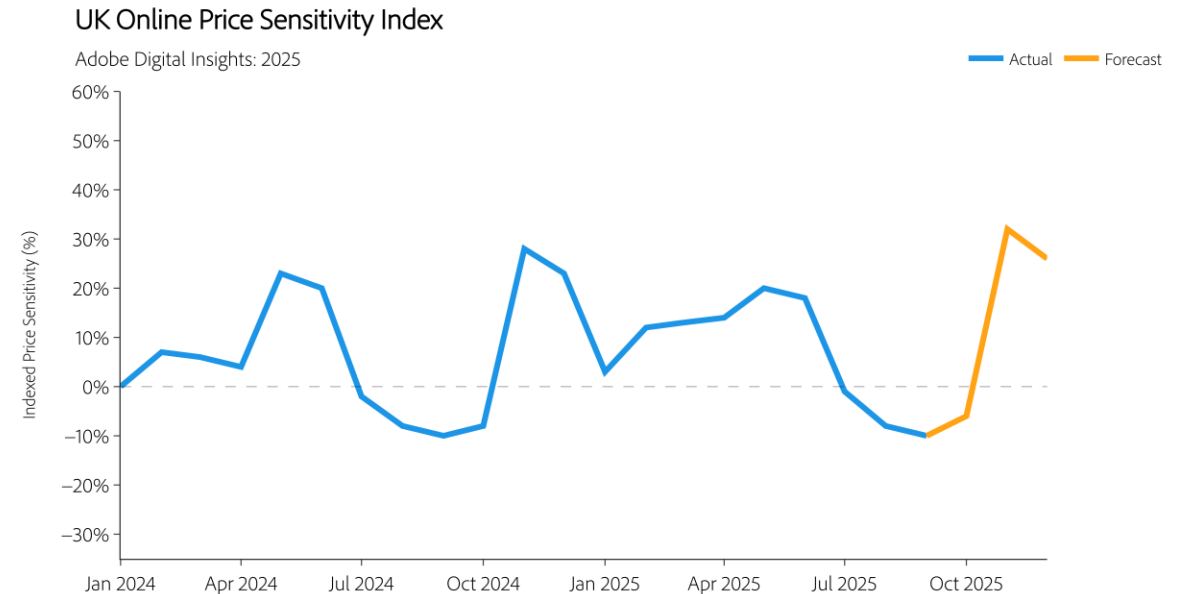
Mobile remains the number-one online shopping format, and its dominance is growing

- Mobile devices will continue to add to their majority share of online spending during the 2025 holiday season, setting a new record for amount spent and share of spend.
- **£15.3 bn** will be spent via mobile devices this holiday season (Nov 1st –Dec 31st), representing **5.5%** growth over last years' **£14.5 bn**.
- Mobile revenue share during the holiday season is forecasted to be **56.7%** of total online spending, up from **56%** during the 2024 holiday season.



Growing price-sensitivity and strong discounts to boost holiday spending

- UK consumers are expected to be more sensitive to price changes this holiday season, which will yield a slightly stronger response to comparable levels of discounting than during the 2024 holiday season.
- Adobe's Online Price Sensitivity Index measures the change in consumer purchasing behavior caused by a 1% change in price, indexed to January 2024, to observe trends in consumer price-sensitivity over time.
- So far in 2025, price sensitivity has grown by an average of **2.3%** year-on-year, and price sensitivity growth is expected to reach **3%** year-on-year during the holiday season.
- Daily average online spending during the holiday season is expected to see a **48.8%** boost over the daily average from Jan-Sept, up from the **47.2%** boost during the same period in 2024. This is driven, in-part, by a stronger response to comparable discounting levels.



Competitive discounts to deliver better value proposition to consumers this holiday season.

- Seasonal discounts are expected to be comparable to 2024 levels, which, when combined with the deflation of online prices throughout this year, has the 2025 holiday season poised to offer consumers better value-for-money than in years past.
- Across the season, discounts are projected to be in the **range of 6% to 23%** with the deepest price-cuts expected between Thursday, 27 Nov (the day before Black Friday) and Cyber Monday (1 Dec) as well as on Boxing Day.

The 2025 holiday season's deepest discounts are expected to reach the following levels on the following days:



Apparel - 17%
Black Friday
Friday 28th Nov



Televisions – 21%
Cyber Monday
Monday 1st Dec



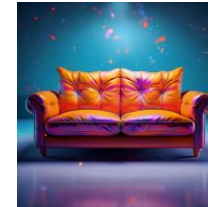
Toys - 17%
Black Friday
Friday 28th Nov



Computers – 23%
Cyber Weekend
Saturday 29th Nov



Appliances – 15%
Thursday 27th Nov



Furniture – 13%
Black Friday
Friday 28th Nov



Sporting Goods - 15%
Boxing Day
Friday 26th Dec



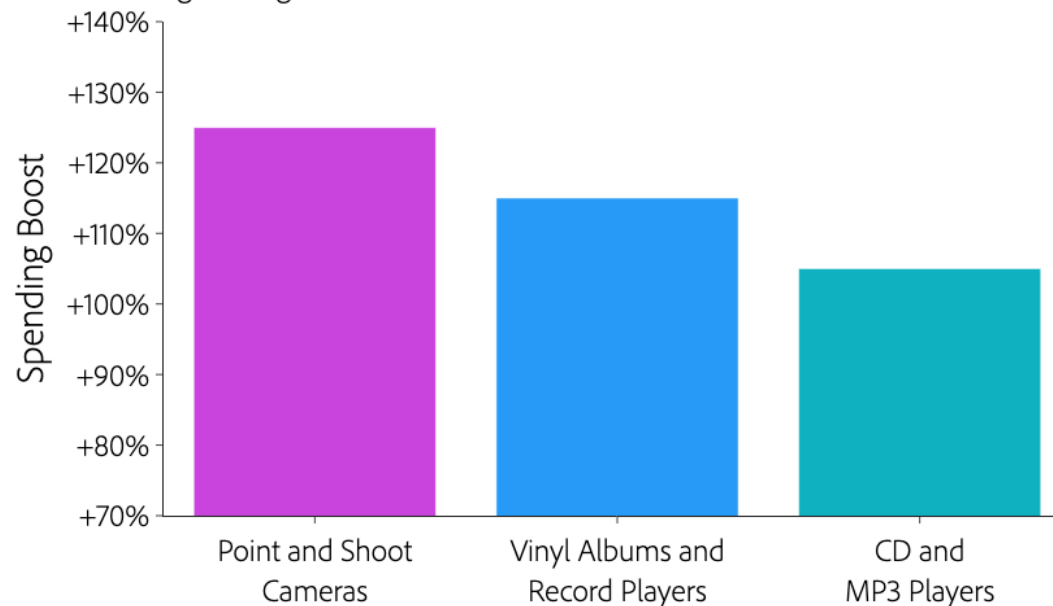
Personal Care - 18%
Black Friday
Friday 28th Nov

Surprisingly Popular Gifts: Retro Tech and Single Purpose Devices

- As a complement to the resurgence of 90s and 2000s fashion and culture, technology from the pre-smartphone era is rising in popularity and expected to perform well during the holiday season.
- While electronics overall are expected to see elevated spending during the holiday season **60%** higher than the daily average from January – September, some retro tech is expected to experience a significantly higher holiday boost to daily spending:
 - Point and Shoot Cameras: **+125%**
 - Vinyl Records and Record Players: **+115%**
 - CD and MP3 Players: **+105%**

Retro Tech: Expected Holiday Boost to Daily Spending

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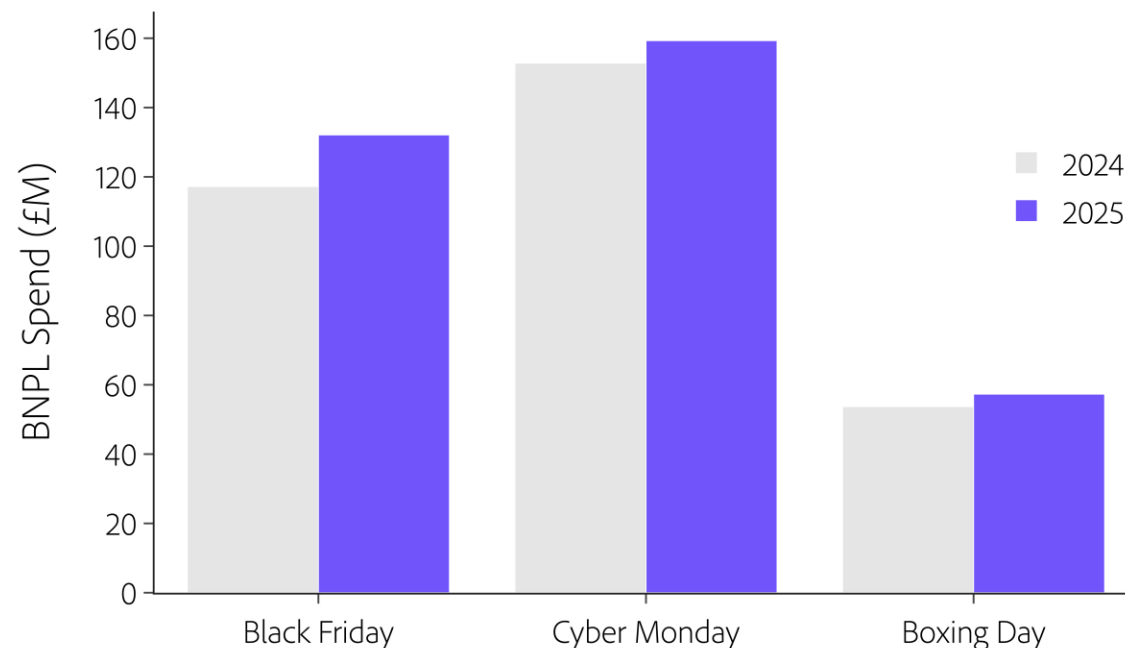


Buy now, pay later forecasted to continue growth this holiday season

- Buy Now, Pay Later (BNPL) growth is forecast to continue as consumers turn to the payment method to spread the cost of their online purchases.
- Total online BNPL spend during the 2025 holiday season (Nov 1 –Dec 31) is forecast at **£3.8 billion**. That's up **5.4%** over last year's **£3.6 billion**.
- The biggest shopping days are forecast to see high levels of BNPL spend. Black Friday is forecasted to see **£132.1 million** in BNPL spend, up 12.7% year on year.
- Cyber Monday is forecast to be the largest day ever for BNPL online spend at **£159.3 million**, an increase of 4.2% over last year's £152.8 million.

Buy Now, Pay Later Spend on Major Days

Adobe Digital Insights; 2024-2025

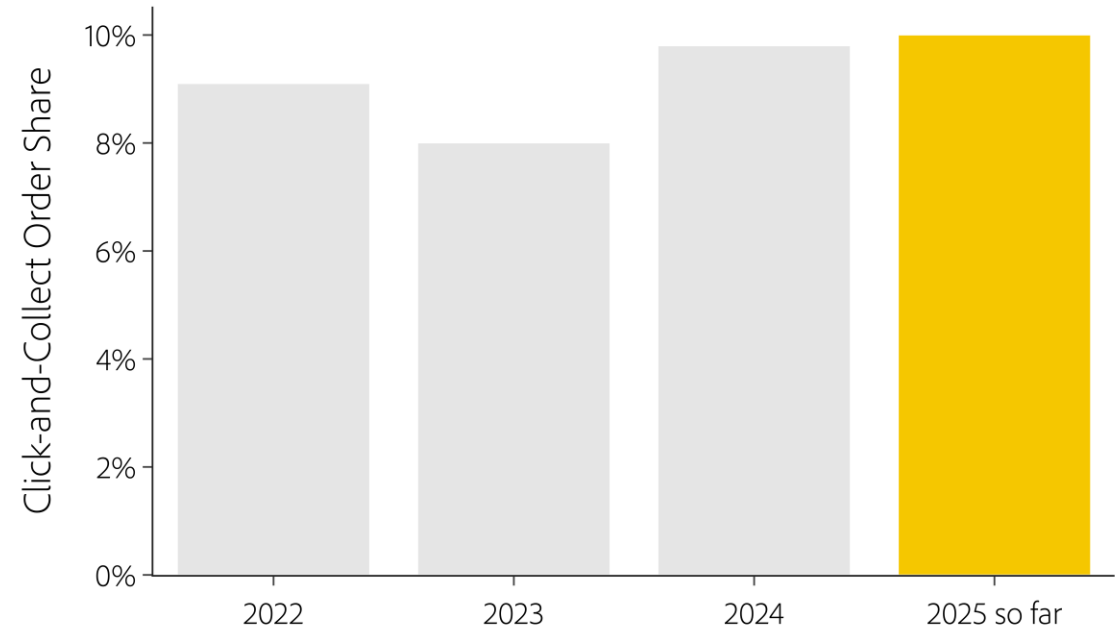


Click-and-Collect remains a go to for last minute shoppers

- Click-and-collect utilization has remained an important pickup method throughout 2025 so far (Jan 1 – Oct 6).
- This fulfillment method has been used in **10.0%** of orders so far this year. This is up slightly from 2024 when it was used in **9.8%** of orders, and 2023 when it was used in **8.0%** of orders.
- Click-and-collect continues to play its biggest role later in the season, as shoppers look to avoid shipping delays. Peak utilization is expected around December 15th – 16th at **13% - 16%** of orders.

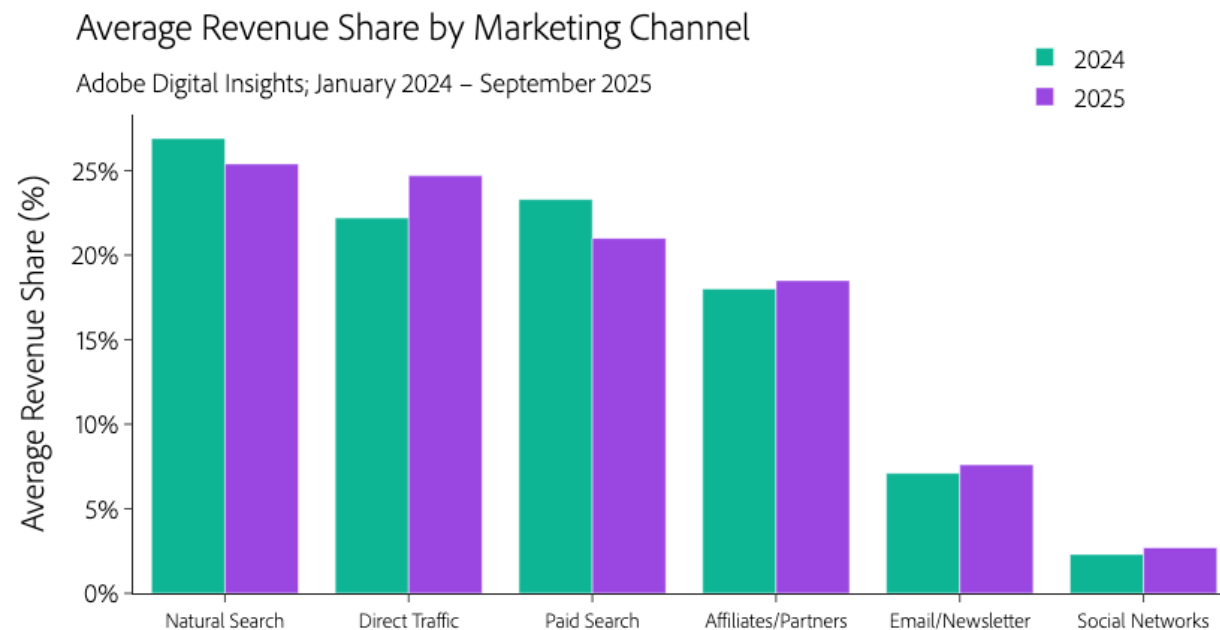
Click-and-Collect Order Share

Adobe Digital Insights; 2022-2025



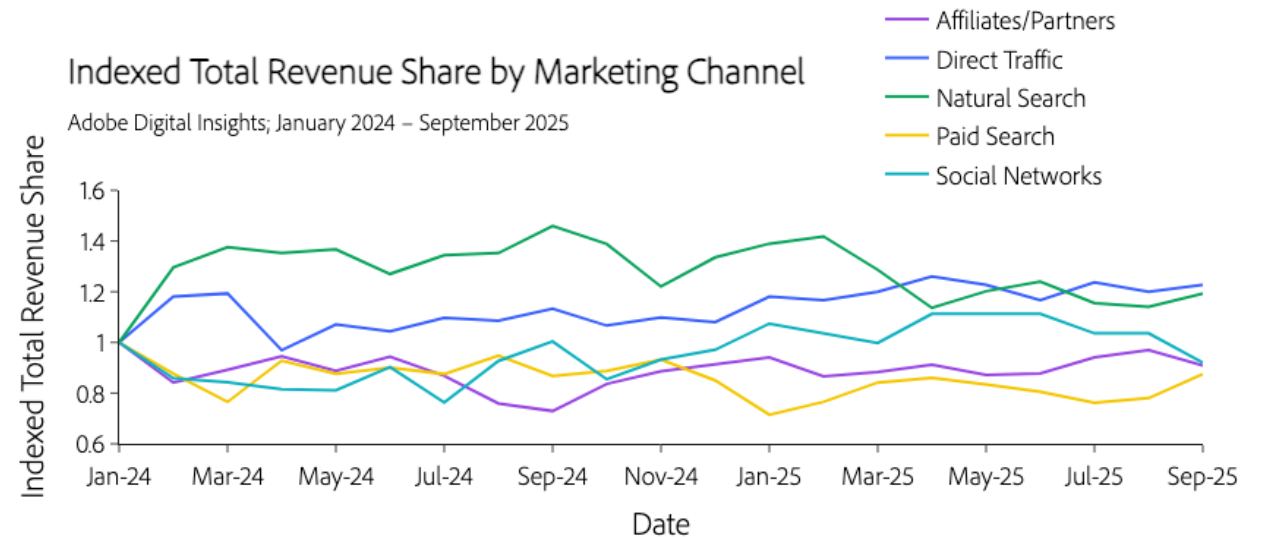
Marketing Channels: Natural Search Leads, Social Delivers the Fastest Growth

- As of January–September 2025, Natural Search leads with **25.4%** of online revenue share, holding the top position.
- Direct Traffic follows closely at **24.7%**, narrowing the gap with Natural Search and overtaking Paid Search.
- Paid Search (**21.0%**) remains a key contributor despite declining this year, while Affiliates & Partners (**18.5%**) gained share year over year.
- Social Networks, while still **under 5%** of revenue share, have delivered the strongest year-to-date growth (**+17% YoY**).



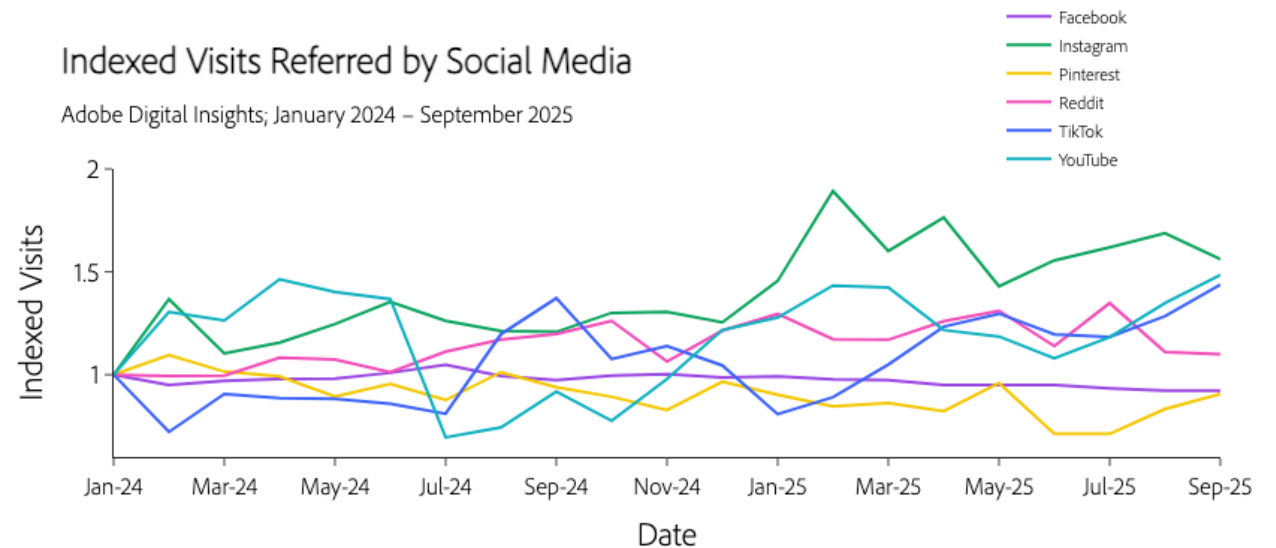
Marketing Channels: Holiday Season Forecast

- Social Networks are set to continue their rapid growth during the holiday period, with revenue share projected to climb by **40%–42% year over year** in November and December 2025.
- Affiliates & Partners are expected to post moderate gains of **4%–5% YoY**, helping stabilize their share.
- Paid Search is expected to post a holiday lift of **9%–11% YoY**, helping stabilize its share after declining during the spring and summer months.
- Direct Traffic is forecast to hold largely stable, with only a modest uptick of **1%–2% YoY**, while Natural Search is expected to decline **8%–10% YoY**, continuing its downward trajectory observed through 2025.



Instagram and TikTok's Traffic Share Surges while Facebook Declines

- Instagram's traffic share is forecast to climb **50%–52% YoY** during the holiday season, marking the strongest gain among social platforms.
- TikTok is projected to rise **42%–45% YoY**, reinforcing its increasingly important role in driving traffic to retail sites.
- YouTube's share is expected to expand **27%–29% YoY**, driven by strong gains through 2025.
- In contrast, Facebook is anticipated to **decline 4%–5% YoY** in retail traffic share over the same period.

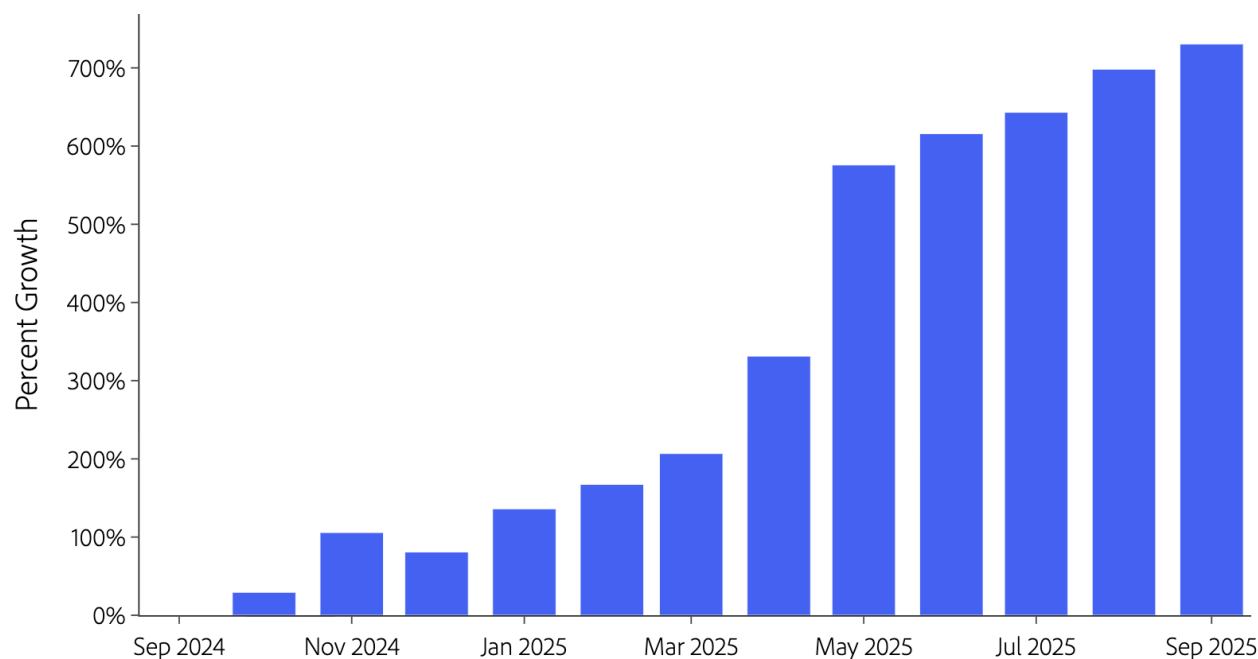


GenAI Traffic Soars with More Growth Expected for the Holidays

- Traffic from GenAI sources to retail sites has skyrocketed throughout 2025, with momentum building into the holiday season.
- GenAI referrals have surged significantly, increasing **730% YoY** in September.
- Given this rapid momentum, referrals from GenAI sites are projected to rise even further, with expected growth of **410% YoY** this holiday season.
- The major shopping days will see major increases in AI traffic with Black Friday and Boxing Day forecast to see traffic share **increase by 310% and 750% on an annual basis respectively.**
- Traffic volumes are forecast to peak on Cyber Monday.

Growth in AI-Driven Visit Share (Retail)

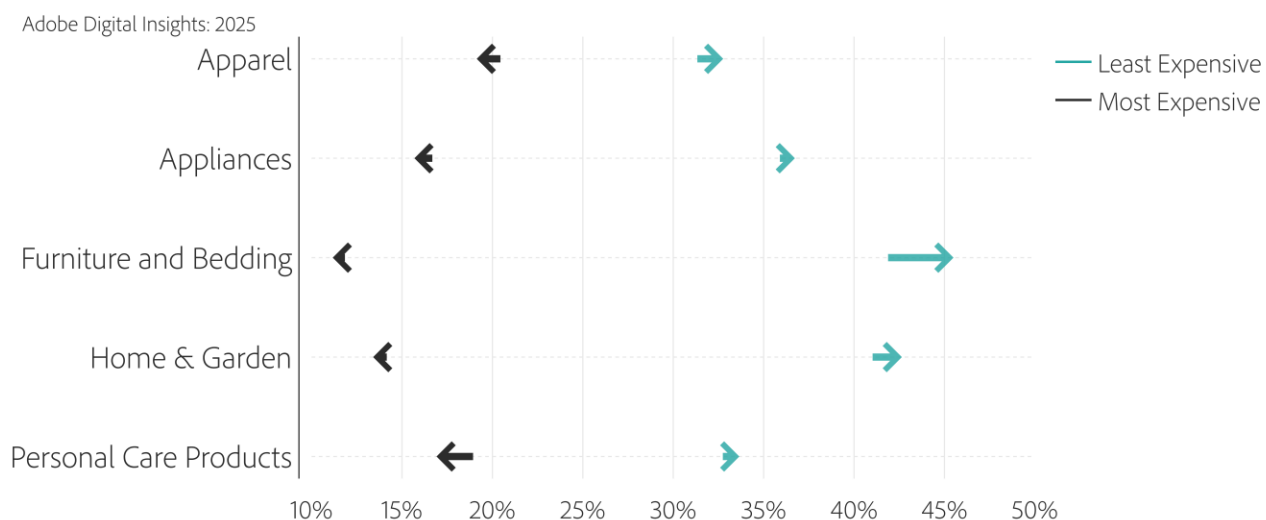
Adobe Digital Insights; September 2024 - September 2025



Trading Down: Affordable products continue to take share from more expensive alternatives

- Trading down trends have continued to accelerate as cost-conscious consumers seek affordable alternatives to more premium items.
- The share of units sold of the cheapest goods across major categories has increased YTD in 2025 compared to 2024:
 - Furniture and Bedding: **+8.9%**
 - Apparel: **+4.5%**
 - Home & Garden: **+3.9%**
 - Personal Care Products: **+3.3%**
 - Appliances: **+2.3%**
- Over the same period the share of the most expensive goods has decreased across those categories by an average of **4.8%**.

UK YTD Share of Units Sold by Category 2025 v. 2024

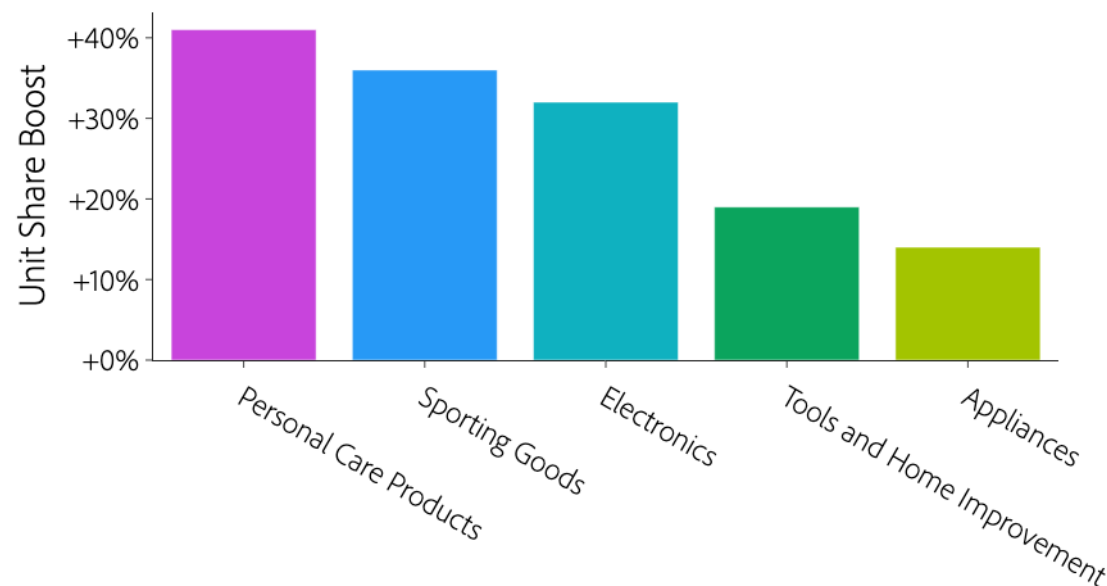


Trading Up: Strong discounts will help push consumers toward higher-ticket items

- Consumers are expected to trade up to more expensive goods during the holiday season, despite broader trading down trends across the first 9 months of 2025.
- The share of goods sold for the most expensive items is expected to increase by **15%** in November and December compared to YTD averages (Jan-Sept).
- Categories with the largest share increases for higher-priced goods include:
 - Personal Care Products: **+41%**
 - Sporting Goods: **+36%**
 - Electronics: **+32%**
 - Tools and Home Improvement: **+19%**
 - Appliances: **+14%**

YTD Unit Share Increase of the Most Expensive Products

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Top gifting categories will drive growth this holiday season

- Beauty and fashion products are expected to perform well this holiday season with categories like **Jewelry**, **Personal Care Products** (including cosmetics), and **Apparel** projected to be popular gifting categories and strong drivers of growth.
- Leisure and entertainment is also expected to be a prominent theme in holiday gifts with **Video Games**, **Toys**, and **Electronics** also contributing significantly to online spending growth during the holiday season.
- **Appliances** and **Home & Garden** products, while not topping the gifting charts, are expected to drive some of the season's growth as consumers capitalize on the lowest prices of the year to invest in their living spaces.

Top Performance

- Video Games
- Jewelry
- Toys
- Personal Care Products

Moderate Performance

- Electronics
- Appliances
- Apparel
- Home & Garden

Weaker Performance

- Grocery
- Pet Products
- Furniture and Bedding
- Baby and Toddler

Hot Products to Watch this Holiday Season



Toys watchlist

- Disney Stitch Puppetronic
- Jellycat stuffed toys
- LEGO sets
- Mini Brands Capsules
- Bluey toys and playsets
- Squishmallow Plush Toys
- Toniebox Starter Set
- Gabby's Dollhouse: Interactive Dollhouse



Video Games watchlist

- Nintendo Switch 2
- PS5
- Xbox Series X
- Mario Kart World
- Donkey Kong Bananza
- Elden Ring: Nightreign
- EA Sports FC 26
- Football Manager 2026
- Call of Duty: Black Ops 7



Additional hot products

- iPhone 17
- Samsung Galaxy S25
- Oura Ring 4
- Kindle Colorsoft
- AirPods Pro 3 (If Released)
- DJI Osmo Pocket 3
- Dyson Airwrap Multi Styler
- Pyjama sets
- Premium advent calendars / hampers

