Mail METRO MEDIA

12 TRENDS OF CHRISTMAS

INTRODUCTION

SECTION 1

INTRODUCTION AND METHODOLOGY

HORIZON SCAN

TRAJECTORY

The Trajectory partnership appraised how their prevailing consumer trends were likely to impact on consumer behaviours in key categories in 2025 and explored their implications for Christmas.

NAT REP SURVEY

STRAT 7

We fielded a quantitative study to 1,500 participants in May 2025. The survey explored how respondents celebrated Christmas last year before asking them to look ahead to Christmas in 2025.

12 TRENDS OF CHRISTMAS

Mail METRO MEDIA

Using a combination of the trend analysis from the horizon scan and the results from the nationally representative survey, we identified 12 Christmas themed trends that we think will be key for retail in 2025.

*MAIN RESEARCH SUPPLEMENTED ADDITIONAL FIRST- AND THIRD-PARTY RESEARCH WHERE APPROPRIATE

CHRISTMAS 2025 IN CONTEXT

SECTION 2

TRENDS SHAPING THE CHRISTMAS RETAIL LANDSCAPE

TRAJECTORY

P

POLITICAL

INTERNATIONAL UNCERTAINTY:

Traditional geopolitical blocs are facing serious challenges from Trump and the European Right, and continued instability in the Middle East.

DOMESTIC POLITICAL CERTAINTY:

After a long period of disruption, the UK is set for a period of political stability. This should create greater certainty around policy and regulation.

E

ECONOMIC

SLOW GROWTH PROSPECTS:

Slow and steady growth predicted rather than any rapid expansion in GDP. International uncertainty and sluggish GDP figures may impact growth further.

CONSUMER CONFIDENCE:

Although it is improving, consumer confidence is low and is continuing to impact consumer spending plans. Confidence in the UK economy is even lower.

S

SOCIAL

MILLENNIAL NATION:

Millennials are now the biggest generation in the UK. Millennial concerns, around housing, family life and sustainability/ethics will become more prominent.

ATOMISATION:

We're spending more time alone – with wide-ranging impacts on how we behave as consumers and how we experience our lives. More people are spending time away from social engagements, the office, or public spaces.

T

TECHNOLOGICAL

THE AI CITIZEN:

AI integration into our daily lives is rapidly expanding. It now plays a larger role in all aspects of life including work, leisure and business.

AGE OF DISTRACTION:

There's more around to distract us than ever – and average attention spans are declining alongside this more distracting world. It's harder to draw out attention – at least in a real and prolonged way.

L

LEISURE

PLAY SOCIETY STRUGGLES:

The onus placed on the importance of leisure has weakened as the prolonged economic impacts of the cost-of-living crisis continued. An improvement in economic situation will reverse this trend.

COST-OF-LIVING LEGACIES:

Continue to impact consumer spending patterns – driving more agile behaviour, reduced spending in some areas, and inequalities in spending from consumer to consumer.

E

ENVIRONMENTAL

CONSUMPTION GUILT:

Not all consumers will care, or be able to care, enough about climate change – but some will. Many want brands to make it as easy and cheap as possible.

CLIMATE CONTESTS:

Economic pressures are likely to continue to depress climate change concerns, and political opposition to climate initiatives is growing.

SOURCE: TRAJECTORY 'HORIZON SCAN' 2025

CHRISTMAS IN 2025: A CONSUMER SNAPSHOT

BRITS ARE LOOKING TO INCREASE THEIR SPEND ON CHRISTMAS FOOD AND GIFTS BUT WILL BE STARTING THEIR PLANNING EARLIER

GENERAL ATTITUDES:

60% ARE ALREADY LOOKING FORWARD TO CHRISTMAS IN 2025 (VS. 60% IN 2024)

+5% (NET) SAY THEY WILL MAKE MORE OF AN EFFORT FOR CHRISTMAS IN 2025 THEN THEY DID IN 2024

+28% (NET) WILL BE STARTING THEIR CHRISTMAS PLANNING EARLIER IN 2025 THEN THEY DID IN 2024

CHRISTMAS FOOD:

+13% (NET) PLAN TO SPEND MORE ON FOOD TO EAT OVER CHRISTMAS IN 2025 THEN THEY DID IN 2024

+5% (NET) PLAN TO SPEND MORE ON DRINK TO CONSUME OVER CHRISTMAS IN 2025 THEN THEY DID IN 2024

-3% (NET) PLAN TO SPEND LESS ON EATING OUT OF HOME AROUND CHRISTMAS IN 2025 THAN IN 2024

CHRISTMAS GIFTING:

+14% (NET) PLAN TO SPEND MORE ON CHRISTMAS GIFTS FOR THEIR FAMILY IN 2025 THEN THEY DID IN 2024

68% PLAN TO DO AT LEAST 50% OF THEIR CHRISTMAS SHOPPING IN-STORE (VS. 61% LAST YEAR)

59% WILL PAY CLOSE ATTENTION TO THE BLACK FRIDAY OFFERS THIS YEAR (VS. 53% LAST YEAR)

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2025

Q: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THESE STATEMENTS ABOUT CHRISTMAS | CHIRSTMAS FOOD | CHRISTMAS GIFTING?

12 TRENDS OF CHRISTMAS

SECTION 3

UNCERTAINTY IN UK ECONOMIC OUTLOOK AND GLOBAL ECONOMIC OUTLOOK CREATING...

FRAGILE CONSUMER CONFIDENCE

THE STATISTICS:

GB AVERAGE OPTIMISM INDEX SCORE (0-100)

May '24	Dec '24	May '25
47	49	51

NET CONFIDENCE IN PERSONAL FINANCES VS NET CONFIDENCE IN NATIONAL FINANCES

	May '24	Dec '24	May '25
Personal	-2%	-2%	+2%
National	-10%	-21%	-17%

TREND DRIVERS:

INTERNATIONAL POLITICAL UNCERTAINTY:
IMPACTING GLOBAL ECONOMIC GROWTH

SLOW GROWTH PROSPECTS:
HAMPERING UK CONSUMER CONFIDENCE

THE EXPLANATION:

Data from Trajectory's 'optimism index' shows that optimism is currently higher now in May '25 at 51, than it was at the same point in May last year (47) and at Christmas in 2024 (49). Optimism has been on an upward trajectory in 2025 as the mood slowly improves.

Our data also shows that consumer confidence is a mixed bag. Consumers' outlook for their own finances is now just about positive, while expectations for the economy have been deeply negative for a year. But the gap between the two – often referred to as the 'bubble' – appears to be closing.

CHRISTMAS IMPLICATIONS:

Where will optimism be by Christmas? There's scope for optimism to grow and the data suggests that we'll be in better position than last Christmas, but as the trend suggests, the mood is fragile and retailers will need to remained tuned into the national mindset.

2

RECOVERY FROM COST-OF-LIVING CRISIS IS INCREASINGLY FRAGMENTED, CREATING A THREE-SPEED UK AND...

'A TALE OF THREE CHRISTMASES'

THE STATISTICS:

HEALTHY HOUSEHOLDS Finances 'healthy'	RECOVERING RESIDENCES Finances 'okay'	DIFFICULT DWELLINGS Finances 'struggling'
% PROPORTION OF GB POPULATION		
21% (vs 20% LY)	48% (vs 46% LY)	31% (vs 34% LY)
LOOKING FORWARD TO CHRISTMAS 2025		
77% (vs 68% LY)	61% (vs 56% LY)	31% (vs 29% LY)
NET SPEND ON CHRISTMAS IN 2025 VS 2024		
+25%	+5%	-28%

TREND DRIVERS:

UNEVEN RECOVERY FROM COL CRISIS:
INCREASING POLARISATION AMONGST KEY DEMOS

POCKETS OF OPTIMISM:
THOSE BETTER OFF FEELING MORE OPTIMISTIC

THE EXPLANATION:

Though overall optimism is increasing, our data shows that not all households are recovering at the same speed. This has created an increasingly fragmented UK, where the optimism 'gap' for some groups (i.e. men, Londoners, higher earners) is growing compared to others (i.e. women, non-Londoners, low earners).

This will result in a 'Tale of Three Christmases' where 'healthy households' and 'recovering residences' enjoy a more traditional Christmas, whilst those 'difficult dwellings' who are struggling financially may have to make significant cutbacks on elements of their food and gift shopping at Christmas in 2025 compared to Christmas in 2024.

CHRISTMAS IMPLICATIONS:

Mass Christmas messaging needs to be inclusive and sensitive to those most in need. However, there are more opportunities in 2025 for brands to capitalise on the increased prosperity of certain consumer groups with effective targeting and tailored advertising partnerships.

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2024 AND 2025
Q: WHICH OF THE BELOW BEST DESCRIBES HOW YOU WILL CELEBRATE CHRISTMAS IN 2025 COMPARED TO 2024?
Q: WHICH OF THESE BEST DESCRIBES YOUR CURRENT HOUSEHOLD SITUATION?

DESIRE FOR INDULGENCE, AMIDST UNCERTAINTY, CREATES DEMAND FOR DIFFERENT…

3 LEVELS OF LUXURY

THE STATISTICS:

59% "IT'S IMPORTANT TO INDULGE YOURSELF AT CHRISTMAS" (ANY AGREE)

37% (vs 31% LY) I WILL BE "TRADING UP" ON THE QUALITY OF CERTAIN FOOD / DRINKS OPTIONS THIS YEAR" (ANY AGREE)

20% WILL BE BUYING THEMSELVES A GIFT AT CHRISTMAS IN 2025

TREND DRIVERS:

ACCESSIBLE LUXURY:
OWN BRAND PRODUCTS ENTER PREMIUM SPACE

PREMIUMISATION:
PREMIUM OPTIONS ACROSS ALL CATEGORIES

THE EXPLANATION:

Luxury is getting more accessible, with premium options available and expected across many categories. And no matter what our financial situation, most of us love to indulge at Christmas, be that on food, drink, homeware or even gifts for ourselves!

As a result, an increasing number of retailers – from bargain to high end – are developing their own-label ranges in categories such as perfume, home decor and spirits.

CHRISTMAS IMPLICATIONS:

Luxury can mean different things to different consumer groups. With more of us planning to indulge, brands and retailers who have expanded their product lines will be more able to cater for these different 'levels of luxury'. Some premium-branded products may struggle to compete and will need to continue promote their unique value to consumers through effective advertising partnerships to keep consumers loyal.

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2024 AND 2025
Q: TO WHAT EXTEND DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT CHRISTMAS | CHRISTMAS FOOD?
Q: WHO, IF ANYONE, DO YOU PLAN TO BUY GIFTS FOR THIS CHRISTMAS?

4

INCREASINGLY INCONVENIENT AND EXPENSIVE TIMES MEANS CONSUMERS ARE DEMANDING...

(MORE) REWARDS FOR THEIR LOYALTY

THE STATISTICS:

FACTORS THAT WOULD ENCOURAGE SHOPPERS TO CHOOSE ONE RETAILER OVER ANOTHER FOR CHRISTMAS GIFTS*

EXCLUSIVE LOYALTY DISCOUNTS: 37%

EXCLUSIVE PRODUCTS: 26%

EXTENDED RETURN PERIOD: 24%

ABILITY TO SCHEDULE DELIVERY: 22%

QUICK PAYMENT PROCESS: 22%

PRODUCTS FROM SMALL BUSINESS: 18%

COMPLIMENTARY WRAPPING: 18%

PERSONALISED SHOPPING: 12%

TRENDING SOCIAL PRODUCTS: 10%

TREND DRIVERS:

COST OF LIVING LEGACIES:
SAVVY SHOPPING HABITS REMAIN

AGE OF INCONVENIENCE:
THINGS MORE EXPENSIVE THAN IN PAST

THE EXPLANATION:

Who doesn't love a reward for loyalty, especially at Christmas? Whilst it's debatable as to whether true loyalty still exists, consumers are becoming both more expectant and more cynical of loyalty schemes. Getting rewards right can hold the key to a successful Christmas for retailers. In fact, exclusive loyalty discounts were the #1 factor that encouraged shoppers to choose one retailer over another last Christmas.

CHRISTMAS IMPLICATIONS:

To win at 'loyalty' at Christmas 2025, alongside overarching Christmas brand messaging, promote the additional benefits that you offer around Christmas. It's what our research tells us that consumers are demanding. These could include extras such as extended delivery periods, exclusive Christmas events / products and additional loyalty services such as personalisation. Don't overlook the importance of your in-store space for exclusive loyalty events / offerings.

*SOURCE: MINTEL: CHRISTMAS AND BLACK FRIDAY 2025

5

THE CHANGING DEMOGRAPHY OF THE UK MEANS RETAILERS WILL NEED TO FOCUS ON…

MEETING THE NEEDS OF MILLENNIALS

THE STATISTICS:

I LIKE TO PROVIDE MY GUESTS WITH A UNIQUE EXPERIENCE WHEN HOSTING (ANY AGREE)

Gen Z: 69%
Millennials: 75%
Gen X: 54%
Boomers: 38%

I WOULD PREFER TO GIVE EXPERIENCES OVER MATERIAL GIFTS AT CHRISTMAS

Gen Z: 25%
Millennials: 25%
Gen X: 17%
Boomers: 9%

TREND DRIVERS:

MILLENNIAL NATION:
MILLENNIALS NOW LARGEST GENERATION

THE PLAY SOCIETY:
RISING IMPORTANCE OF EXPERIENCES

THE EXPLANATION:

Millennials are now the largest generation in the UK by number, overtaking Baby Boomers, and they are growing! As they age, they're also likely to be the typical family this Christmas – parents with young kids. Millennials are a more diverse bunch with different attitudes towards family life, food and ethics. Thus, 'meeting the needs of millennials' and reflecting them in advertising will become increasingly important to retailers at Christmas in 2025 and beyond.

CHRISTMAS IMPLICATIONS:

When it comes to hosting, for example, millennials are more open to 'twists' on traditional recipes, meat alternatives, eco-conscious options and keener to provide unique experiences for guests.

When it comes to gifting, millennials have a larger repertoire of people to buy for (i.e. children, siblings, parents) and have a stronger preference for social and experiential shopping.

In terms of representation, millennials are more likely to be ethnically diverse, members of the LGBTQ+ community and living in rented accommodation.

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2024 AND 2025
Q: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT CHRISTMAS FOOD | CHRISTMAS GIFTING?

INCREASING UPTAKE AND SATISFACTION WITH GENERATIVE AI COULD LEAD TO AN OUTBREAK OF...

6 SANTA'S LITTLE (AI-POWERED) HELPERS!

THE STATISTICS:

OPENESS TO AI FOR CHRISTMAS PLANNING (HAVE USED OR WOULD CONSIDER USING)

PERSONALISED RECOMMENDATIONS	PRE-PURCHASE CUSTOMER SERVICE	VIRTUAL TRY-ONS	POST-PURCHASE CUSTOMER SERVICE
23%	22%	16%	9%

ATTITUDES TOWARDS AI AND CHRISTMAS ADVERTISING

ARE AWARE THAT AI IS USED FOR CHRISTMAS ADS

THINK IT'S ACCEPTABLE TO USE AI TO CREATE CHRISTMAS CAMPAIGNS

TREND DRIVERS:

THE AI CITIZEN:
HUGE GROWTH IN GENERATIVE AI UPTAKE

AI AND ADVERTISING:
INCREASED USAGE IN PLANNING & EXECUTION

THE EXPLANATION:

The last few years have seen more and more Brits start using Generative AI tools like ChatGPT, Gemini and Claude. We expect Generative AI to play an increasingly prominent role in how some consumers connect with brands at Christmas.

CHRISTMAS IMPLICATIONS:

For the Christmas purchase journey, we expect to see plenty of people using AI for planning, gift ideas, personalised recommendations, recipe advice and inspiration. Less so for areas which consumers deem as more important brand interactions.

When it comes to the Christmas advertising, Brits are divided on AI usage with concerns it will impact the human and emotional connection that Christmas ads are known and loved for.

Think about where AI can be used to positively enhance the consumers' connection with your brand like saving time, money or having fun! Don't let it get in the way of human side of connecting with your brand.

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2025
Q: THINKING ABOUT THE IMPACT OF ARTIFICIAL INTELLIGENCE (AI) AND TECHNOLOGY IN THE CHRISTMAS SHOPPING JOURNEY. AT WHICH STAGES OF CHRISTMAS SHOPPING, HAVE YOU USED AI, OR WOULD YOU CONSIDER USING AI? BEFORE TODAY, WERE YOU AWARE THEY DID THIS?

INCREASING INFLUENCE OF SOCIAL MEDIA AND SHOPPING EVENTS DRIVING...

GROWTH OF DIGITAL AND SOCIAL COMMERCE

THE STATISTICS:

INFLUENCE OF SOCIAL MEDIA ON CHRISTMAS GIFT BUYING

TOTAL: 33%
Gen Z: 48%
Millennials: 43%
Gen X: 28%
Boomers: 21%

LAST YEAR: 30%

INTEREST IN BUYING CHRISTMAS GIFTS ON 'SINGLES DAY'

TOTAL: 38%
Gen Z: 62%
Millennials: 57%
Gen X: 32%
Boomers: 14%

TREND DRIVERS:

THE DEMISE OF DISTANCE:
DIGITAL COMMERCE INCREASINGLY IMPORTANT

THE PLAY SOCIETY:
RISING IMPORTANCE OF EXPERIENCES

THE EXPLANATION:

Social media is becoming increasingly influential in providing inspiration for Christmas gifts. Live-stream shopping events on digital and social platforms like TikTok Shop are more becoming popular ways to buy gifts.

Combine this, with increased popularity of well-established shopping events such as Black Friday and emerging ones like 'Singles Day', it's clear that the traditional way of thinking about the Christmas shopping journey is being reframed.

CHRISTMAS IMPLICATIONS:

Alongside their own exclusive shopping events, brands will need to continue to interweave their marketing communications around these key Christmas retail events. Newsbrands like Mail Metro Media have always written about new products and events. They now have their own commerce teams and shopping channels dedicated to help selling them. This makes newsbrands a worthwhile commerce partner in the lead up to Christmas.

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2025
Q: BELOW ARE A SERIES OF STATEMENTS RELATING TO SINGLES' DAY (11TH NOVEMBER). DO THE FOLLOWING STATEMENTS APPLY TO YOU?
Q: IMAGINE YOU WERE LOOKING FOR THE FOLLOWING TYPES OF INFORMATION. WHICH MEDIA, IF ANY, WOULD BE A USEFUL SOURCE?

8 AN INCREASED FOCUS ON QUALITY, SUSTAINABILITY AND UNIQUE GIFTS LEADING TO RISE IN…

MINDFUL GIFT-GIVING

THE STATISTICS:

ENVIRONMENTALLY FRIENDLY / SUSTAINABLE CHOICES WILL BE MORE IMPORTANT IN 2025 THAN 2024

+10%

Gen Z: +17%
Millennials: +11%
Gen X: +5%
Boomers: +10%

PARTICIPATION IN ALTERNATIVE GIFTING IN 2024

I GAVE A COMBINED GIFT TO MULTIPLE RECIPIENTS LAST YEAR, RATHER THAN INDIVIDUAL GIFTS

I PARTICIPATED IN A 'SECRET SANTA' EXCHANGE AT CHRISTMAS IN 2024

TREND DRIVERS:

CONSUMPTION GUILT:
DESIRE TO REDUCE WASTE

THE PLAY SOCIETY:
RISING IMPORTANCE OF EXPERIENCES

THE EXPLANATION:

2024 saw a significant rise in premium and environmentally friendly claims in new festive food and gifting product ranges. It also saw an increased openness to 'homemade' and 'second hand' gift giving - with 25% of gift buyers buying second-hand items.

This has led to the emergence of 'fewer but better' and 'group gifting' trends in recent years.

CHRISTMAS IMPLICATIONS:

Changes to 'traditional' gift purchasing habits present plenty of exciting opportunities for brands across multiple categories; from second-hand through to experience-based and luxury.

Brands may want to think more about how they promote more thoughtful gift offerings and showcase how the thought behind the gift is portrayed as an essential part of the gift buying experience.

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2025 | MINTEL: CHRISTMAS AND BLACK FRIDAY 2025
Q: WHICH OF THE BELOW BEST DESCRIBES HOW YOU WILL CELEBRATE CHRISTMAS IN 2025 COMPARED TO 2024, WHEN IT COMES TO MAKING ENVIRONMENTALLY FRIENDLY CHOICES?

THE SHIFT TOWARDS HEALTHIER DIETS AND LIFESTYLES COULD LEAD MORE TO BRITS...

9 HAVING THEMSELVES A HEALTHY LITTLE CHRISTMAS

THE STATISTICS:

I WILL BE TRYING TO HAVE A HEALTHIER CHRISTMAS THIS YEAR (ANY AGREE)

Gen Z: 53%
Millennials: 57%
Gen X: 31%
Boomers: 28%

TOPICS TYPICALLY ASSOCIATED WITH SUPERMARKET ADVERTISING VS MOST INTERESTED IN SEEING

MOST ASSOCIATED MOST INTERESTED

HEALTHY EATING

FRESHNESS & QUALITY

TREND DRIVERS:

CONSUMPTION GUILT:
REDUCING RED MEAT AND UPF CONSUMPTION

MILLENNIAL NATION:
HEALTHIER CHRISTMAS LIFESTYLES

THE EXPLANATION:

Disregarding the specifics of the LHF (Less Healthy Foods) regulations, many Brits are already cutting back on unhealthy foods (57%) and are generally supportive of greater regulation on unhealthy foods (49%). They are also interested in seeing more ads that promote healthy living. These behaviours are impacting their Christmas habits, with 4 in 10 hoping ‘to have a healthier Christmas this year’, rising to 6 in 10 for millennials!

CHRISTMAS IMPLICATIONS:

Christmas is often associated with over-indulgence, but indulgence doesn’t have to be a dirty word. Brands may benefit by leaning into healthier portrayals of Christmas to appeal to a broader range of demographics.

This could be achieved by including healthy Christmas food and drink switch ups and recipes. Advertisers can also highlight activities that can be healthy, fun and promote mental well-being across the Christmas period, instead of waiting until the new year draws closer.

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2024 AND 2025
Q: WHICH OF THE BELOW BEST DESCRIBES HOW YOU WILL CELEBRATE CHRISTMAS IN 2025 COMPARED TO 2024?

D R E A M

Mail METRO MEDIA

10

NEW MEDIA REGULATIONS AND NEW MEDIA RESEARCH LEADING TO A POTENTIAL...

RE-EVALUATION OF THE CHRISTMAS MEDIA MIX

THE STATISTICS:

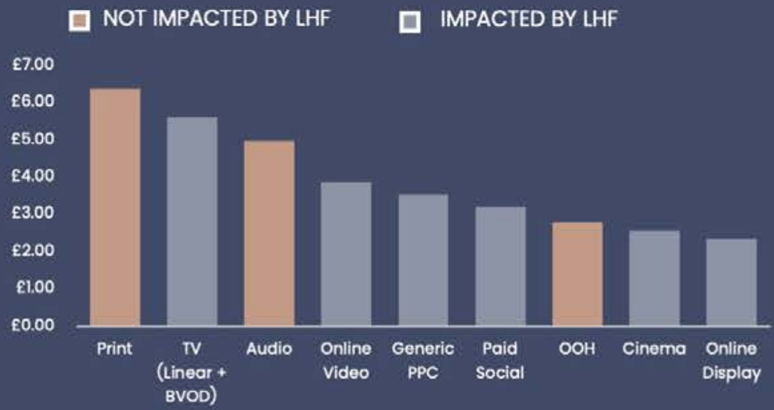
IAB VOLUNTARY COMMITMENT TO NOT SHOW LHF PRODUCT-BASED ADVERTISING

2025
OCT

LHF ONLINE AD BAN TO LEGALLY COME INTO EFFECT

2026
JAN

PROFIT ROI BY MEDIA TYPE – FULL PAYBACK



TREND DRIVERS:

DOMESTIC POLITICAL CERTAINTY:
RESTRICTIONS ON ADVERTISING HFSS FOODS

AGE OF DISTRACTION:
ATTENTION SPANS DECLINING WITH MORE DISTRACTIONS

THE EXPLANATION:

The continual shift of marketing budgets from more 'traditional' channels to social platforms and search may come under increasing scrutiny at Christmas in 2025. Upcoming LHF (Less Healthy Foods) regulation may force a change in strategy away from product to brand-based advertising.

It may also lead to experimentation with new or historically popular media channels such as Print, OOH and Radio, which are proven at delivering profit ROI for clients and not subject to new regulations.

CHRISTMAS IMPLICATIONS:

To help navigate this uncertain period, advertisers will need to partner with agile, trusted and effective media partners like Mail Metro Media. Advertisers will need media owners who they can innovate and experiment with, to help them deliver profitable campaigns as they navigate the impact of the LHF regulations at Christmas in 2025 and beyond.

SOURCE: IAB 2024 AND THINKBOX PROFIT ABILITY 2 2024

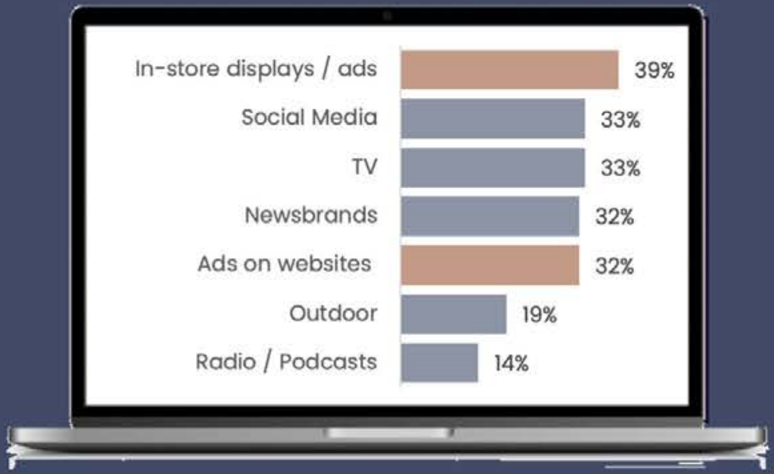
11

INCREASED INVESTMENT, ACCESSIBILITY AND THE ABILITY TO CLOSE THE LOOP LEADING TO...

RETAIL MEDIA'S RENAISSANCE

THE STATISTICS:

SOURCES OF INSPIRATION FOR CHRISTMAS GIFTS



+22%

INCREASE IN RETAIL MEDIA INVESTMENT IN 2024, EXPECTED TO SURPASS £1BN THROUGHOUT 2025

TREND DRIVERS:

DATA DEMOCRATISATION:
OPENING UP OF VALUABLE DATA SETS

THE PLAY SOCIETY:
RISING IMPORTANCE OF EXPERIENCES

THE EXPLANATION:

Retailers are increasingly utilising in-store and online environments to monetise their valuable retail space and customer data, a trend expected to boom in 2025.

In-store environments are increasingly becoming a creative canvas for brands to showcase their products through advertising opportunities, demonstrations and other unique experiences like community centres.

In online environments, high-quality data and the ability to close the sales loop have led to a +22% increase in retail media investment in 2024 and more and more retailers launching retail media offerings.

CHRISTMAS IMPLICATIONS:

Never before have the retailers been so open to sharing their consumer data. Media partners that can ingest, embellish and enhance the effectiveness of this data will make key partners at Christmas in 2025 and beyond.

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2025 | IAB 2024
Q: IMAGINE YOU WERE LOOKING FOR THE FOLLOWING TYPES OF INFORMATION. WHICH MEDIA, IF ANY, WOULD BE A USEFUL SOURCE?

IN A TECH-OBSESSED WORLD, MORE THAN EVER, BRANDS AT CHRISTMAS NEED TO CAPTURE...

REAL-LIFE CONNECTIONS

THE STATISTICS:

CHRISTMAS HAS BECOME TOO COMMERCIALISED (ANY AGREE)

Gen Z: 49%
Millennials: 57%
Gen X: 75%
Boomers: 85%

I ENJOY SEEING CHRISTMAS ADVERTISING CAMPAIGNS (ANY AGREE)

Gen Z: 65%
Millennials: 71%
Gen X: 55%
Boomers: 46%

TREND DRIVERS:

ATOMISATION:
MORE PEOPLE SPENDING MORE TIME ALONE

AGE OF DISTRACTION:
ATTENTION SPANS DECLINING WITH MORE DISTRACTIONS

THE EXPLANATION:

Christmas is, and has always been, about connecting with people in moments that bring us most joy. Be that through feasting on festive food, crying at a Christmas classic or reaching out forgotten friends.

But for many, the magic of Christmas has been lost. Overcommercialisation is often blamed for an erosion of Christmas traditions.

CHRISTMAS IMPLICATIONS:

In a society where Brits spend over five hours a day on their phone and increasing parts of their days alone, could this be the year where brands encourage people to create more real-life connections, be that in their homes, in retail spaces or online?

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2025
Q: TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOW STATEMENTS ABOUT CHRISTMAS?

CHRISTMAS AT MAIL METRO MEDIA

SECTION 4

YULE LOVE THE REACH OF OUR PORTFOLIO AND OUR HISTORY OF DELIVERING AT CHRISTMAS

1

REACHING THE NATION

39.4M

BRITISH ADULTS REACHED EVERY MONTH
(73% OF GB POP)

REACH BY KEY AUDIENCE

GEN Z: **5.6M (57%)**
MILLENNIALS: **9.7M (68%)**
GEN X: **10.1M (77%)**
BOOMERS: **13.9M (82%)**

HEALTHY HOUSEHOLDS: **11.2M (75%)**
RECOVERING RESIDENCES: **16.2M (75%)**
DIFFICULT DWELLINGS: **8.9M (73%)**

2

CHRISTMAS PURCHASE POWER

29.7M

CHRISTMAS GIFT BUYERS REACHED EVERY MONTH
(76% OF ALL BUYERS)

£5.3BN

SPENT ON CHRISTMAS GIFTS EVERY YEAR
(THAT'S 78P IN EVERY £1 SPENT ON CHRISTMAS GIFTS)

3

INSPIRING ACTION

+51%

AVERAGE INCREASE IN CONSIDERATION OF OUR PARTNERSHIPS

63%

AVERAGE 'ACTION TAKEN' SCORE OF OUR PARTNERSHIPS

SOURCE: TGI GB MAY 2025 – TOTAL MAIL METRO MEDIA REACH INCLUDING SOCIAL MEDIA PLATFORMS
MAIL METRO MEDIA AD EFFECTIVENESS BANCHMARKING SHEET 2025

NEARLY 9 IN 10 (86%) ARE INTERESTED IN CHRISTMAS ADVERTISING CONTENT

CHRISTMAS CONTENT MOST INTERESTED IN:
TOP 10 RANK

1. **CHRISTMAS FOOD & DRINK OFFERS:** 48%
2. **CHRISTMAS RECIPES:** 43%
3. **CHRISTMAS GIFT GUIDES:** 33%
4. **EVENTS & ATTRACTIONS:** 32%
5. **CHRISTMAS BAKING IDEAS:** 31%
6. **DECORATION INSPIRATION:** 26%
7. **ACTIVITIES TO DO AT HOME:** 24%
8. **IDEAS ON REDUCING WASTE:** 20%
9. **CHRISTMAS HOSTING IDEAS:** 20%
10. **CHRISTMAS / WINTER FASHION:** 18%

1,114
CHRISTMAS ARTICLES ACROSS OUR DIGITAL SITES

22.2M
ARTICLE VIEWS ON OUR CHRISTMAS CONTENT

612K
HOURS SPENT ENGAGING WITH OUR CHRISTMAS CONTENT

TOP XMAS THEMES:

1. GIFT GUIDES
2. CELEBRITY CHRISTMAS
3. TV / MOVIE GUIDES
4. RECIPES
5. HOSTING

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2025 & INTERNAL ANALYTICS LAST 400 DAYS
Q: WHICH, IF ANY, OF THE FOLLOWING TOPICS DO YOU GENERALLY LIKE TO READ ABOUT DURING CHRISTMAS?

HARNESS THE POWER OF OUR DATA PRODUCTS TO DELIVER EFFECTIVE CHRISTMAS CAMPAIGNS

dmg::ID

EXCLUSIVE+

Best for:

- Bespoke target audiences
- Driving awareness, consideration and outcomes

Includes:

- Bespoke data strategy based on interest, demo, geo, context, in-market and outcome segments
- Data-led optimisations
- Data PCA and learnings

AUDIENCE TAKEOVER

Best for:

- Broad category audience
- Driving awareness, consideration for a relevant audience

Includes:

- Takeover experience using premium formats above the fold served to a specific audience
- Available audiences include Leisure, Movies, Food & Drink, Alcohol, Supermarkets and Health & Fitness

RE-TARGET

Best for:

- Connecting to users who are thinking about your brand
- Driving outcomes

Includes:

- Users who have recently had a positive engagement with your brand across commercial, editorial and commerce

FIVE GOLDEN

CHRISTMAS ADVERTISING TIPS

SECTION 5

CAPITALISE ON AN INCREASED OPENNESS TO ADVERTISING WITH CONTENT MOST RELEVANT TO YOUR AUDIENCES

ATTITUDES TOWARDS CHRISTMAS ADVERTISING:
% AGREEMENT WITH STATEMENT

50% I am more open to advertising at Christmas than at other times of the year

49% Most Christmas advertising campaigns that I see are not relevant to me

40% Christmas advertising helps me choose what I want to buy

CHRISTMAS CONTENT MOST INTERESTED IN:
TOP 10 RANK WITH KEY DEMOGRAPHIC SPLITS

1	**CHRISTMAS FOOD & DRINK OFFERS:** 48%	DIFFICULT DWELLINGS: 53%
2	**CHRISTMAS RECIPES:** 43%	WOMEN: 50%
3	**CHRISTMAS GIFT GUIDES:** 33%	MILLENNIALS: 39%
4	**EVENTS & ATTRACTIONS:** 32%	HEALTHY HOUSEHOLDS: 39%
5	**CHRISTMAS BAKING IDEAS:** 31%	MUMS: 45%
6	**DECORATION INSPIRATION:** 26%	GEN Z: 35%
7	**ACTIVITIES TO DO AT HOME:** 24%	MUMS: 40%
8	**IDEAS ON REDUCING WASTE:** 20%	MILLENNIALS: 24%
9	**CHRISTMAS HOSTING IDEAS:** 20%	MUMS: 32%
10	**CHRISTMAS / WINTER FASHION:** 18%	MILLENNIALS: 32%

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2024
Q: THINKING ABOUT CHRISTMAS ADVERTISING, WHICH OF THE FOLLOWING DO YOU LIKE TO SEE / HEAR / READ THE MOST? SOURCE: MMM CHRISTMAS IN 2024 (N=1,500)

2 CAPTURE THE FEEL-GOOD NATURE OF THE SEASON AND DON'T BE AFRAID TO PULL ON THE HEARTSTRINGS!

WHAT CUSTOMERS WANT FROM ADVERTISING AT CHRISTMAS VS. OTHER TIMES OF THE YEAR

	Good news / feel good content	Humorous content	Eye-catching visuals	Clear product information	Catchy slogan / song	Clear brand information	Ads that move me emotionally
RANKING AT CHRISTMAS	1	2	3	4	5	6	7
RANKING CHANGE VS. OTHER TIMES OF YEAR	+2	0	+2	-3	+3	-2	+3

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2024
Q: THINKING ABOUT CHRISTMAS ADVERTISING, WHICH OF THE FOLLOWING DO YOU LIKE TO SEE / HEAR / READ THE MOST? SOURCE: MMM CHRISTMAS IN 2024 (N=1,500)

3 CREATE SOME EXTRA MAGIC BY TAPPING INTO MAINSTREAM AND MORE UNIQUE CHRISTMAS TRADITIONS!

FAVOURITE THINGS ABOUT CHRISTMAS:
TOP 10 RANK

1. **SPENDING TIME WITH FAMILY:** 81%
2. **EATING AND DRINKING:** 75%
3. **RELAXING:** 73%
4. **GIVING GIFTS:** 71%
5. **SPENDING TIMES WITH FRIENDS:** 45%
6. **CHRISTMAS TV / MOVIES:** 43%
7. **RECEIVING GIFTS:** 41%
8. **BEING AWAY FROM WORK:** 30%
9. **GOING TO PUBS / RESTAURANTS:** 15%
10. **BEING AWAY FROM HOME:** 9%

FAVOURITE CHRISTMAS TRADITIONS:
MAINSTREAM AND UNIQUE EXAMPLES

FOOD

"Making sausage rolls & mince pies on Christmas Eve with my Mum whilst having a few drinks & listening to festive music!"

"Fake Christmas, where the family get together a day or two before Christmas, when everyone has finished work and come home for the holidays and enjoy a Chinese takeaway together!"

MOVIES

"Christmas Eve movie night is my favourite, we all put on our pyjamas and sit-down watching loads of Christmas movies."

"Our Christmas Movie Bucket! Every Friday, we take it in turns to pick a Christmas movie from the bucket. Then we sit down as a family to watch it with a takeaway and enjoy the festive lights."

CUSTOMS

"Leave a mince pie and a glass of wine by the Christmas tree for Father Christmas and a carrot for Rudolph the reindeer."

"Having a Christmas Eve box where the elves bring a box filled with treats and new pjs. Making cookies and having the elf arrive and do naughty things."

GIFTS

"Opening presents one at a time so we can all see what each other has got and talk about it, rather than rushing through."

"Every year we gift each other 'tree presents', which are one pound presents we put in the tree so we still have something to open after Christmas dinner."

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2020 & 2025
Q: WHAT ARE YOUR FAVOURITE THINGS ABOUT CHRISTMAS? WHAT ARE YOUR FAVOURITE CHRISTMAS TRADITIONS?

4 CONTINUE YOUR WELL-LOVED STORIES OR CONTINUE WITH YOUR UNIQUE CHRISTMAS ADVERTISING IDENTITY

ATTITUDES TOWARDS CHRISTMAS ADVERTISNG FROM INDIVIDUAL RETAILERS:

54% I look forward to advertising from certain companies at Christmas

TOP ADVERTISER MENTIONS

JOHN LEWIS & PARTNERS
"John Lewis - because their advertising is always focused on the real spirit of Christmas ."

Coca-Cola
"I just feel like the Coca-Cola truck advert really signifies the start of the holiday season."

ALDI
"Aldi as I like the Kevin the Carrot stories!"

TESCO
"Tesco because the includes a mix of humour and reality about Christmas!"

AND AS ALWAYS, TURN UP AT THE RIGHT TIME AND IN THE RIGHT PLACES

5

ROAD TO CHRISTMAS
KEY DATES FOR CHRISTMAS IN 2025

SALES EVENTS	SINGLES DAY: NOV 11TH	BLACK FRIDAY: NOV 28TH	LOYALTY EVENT: TBC TBC
KEY FODD DATES	START PLANNING: NOV 30TH	START BUYING: DEC 7TH	SUPER SATURDAY: DEC 20TH
KEY GIFT DATES	START PLANNING: OCT 26TH	START BUYING: NOV 1ST	FINISH BUYING: DEC 6TH

SOURCES OF INFORMATION FOR CHRISTMAS RECIPES
TOP 10 RANK

1. **NEWSBRANDS:** 32%
2. **SUPERMARKET WEBSITES:** 30%
3. **SOCIAL MEDIA: 27%**
4. **TELEVISION:** 26%
5. **IN-STORE DISPLAYS:** 23%
6. **PRODUCT BRAND WEBSITES:** 16%
7. **GENERATIVE AI:** 13%
8. **AUDIO:** 12%
9. **OUTDOOR:10%**
10. **CONSUMER WEBSITES:** 9%

SOURCES OF INFORMATION FOR CHRISTMAS GIFTS
TOP 10 RANK

1. **MULTI-CATEGORY WEBSITES: 40%**
2. **IN-STORE DISPLAYS: 39%**
3. **TELEVISION: 33%**
4. **SOCIAL MEDIA:** 33%
5. **NEWSBRANDS:** 32%
6. **PRODUCT BRAND WEBSITES: 29%**
7. **OUTDOOR: 19%**
8. **GENERATIVE AI:** 16%
9. **AUDIO :14%**
10. **CONSUMER WEBSITES: 14%**

SOURCE: MAIL METRO MEDIA RETAIL AT CHRISTMAS 2020 & 2025
Q: IMAGINE YOU WERE LOOKING FOR THE FOLLOWING TYPES OF INFORMATION. WHICH MEDIA, IF ANY, WOULD BE A USEFUL SOURCE?

D R E A M

Mail METRO MEDIA

12 TRENDS OF CHRISTMAS