

Think with Google

Holiday Essentials



The marketer's guide to **win the season**

Executive Summary

Holiday 2025 is a pivotal moment for marketers. Shoppers are entering the season with caution: 61% of U.S. shoppers said they are more choiceful with how they spend their money because they are worried about the future.¹ This is reducing spontaneous purchases and driving more research-driven behavior.

Amid this, marketers face one of the most complex seasons yet. They are expected to do more with less: maximize value on smaller budgets, deliver stronger ROI, and invest responsibly across channels.

Delivering the shopper's new definition of value — right price, product confidence, and purchase convenience — is nonnegotiable for success. Marketers can take five essential actions now to meet this mandate.

How to win the season: 5 essentials

- 1 Engage users early**
Be present across the extended season, ensuring your products and offers appear where shoppers are looking and researching.
- 2 Highlight value in your product mix and make it discoverable across key surfaces**
Ensure your product descriptions and creative emphasize long-term benefits and seasonal promotions, and make them visible across Search, Discover, and AI Overviews.
- 3 Build trust and confidence through Search and Video**
Optimize how your products show up across shoppers' primary validation engines: Search and YouTube. Partner with trusted creators to give shoppers the validation they need to make confident choices.
- 4 Deepen loyalty and nurture high-value customers**
Strengthen relationships with your most valuable audiences through personalized experiences and engagement.
- 5 Remove friction across online and offline journeys**
Make it easy for shoppers to move from intent to purchase with simple, seamless experiences everywhere they choose to buy.

Success across these essentials will depend on effectively leveraging AI. Google's holiday AI essentials helps you build strength across data, content, and performance, using AI to connect insights, scale creative, and drive smarter decisions.

Drawing on research and insights from Google, agency partners, brand leaders, and Economist Impact, this guide equips your team to understand shifting consumer behavior, take specific actions to address it, and maximize ROI using AI. We hope it helps you win the season.

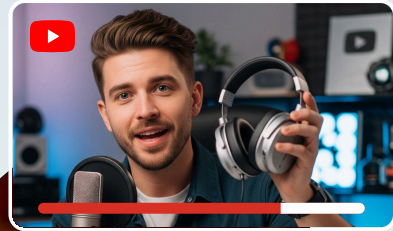


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Gift ideas for my Gen Z niece
who loves music



Wireless Headphones

Ad



Add to cart

Chapter 1

The holiday shopper's new value equation

EXECUTIVE SUMMARY

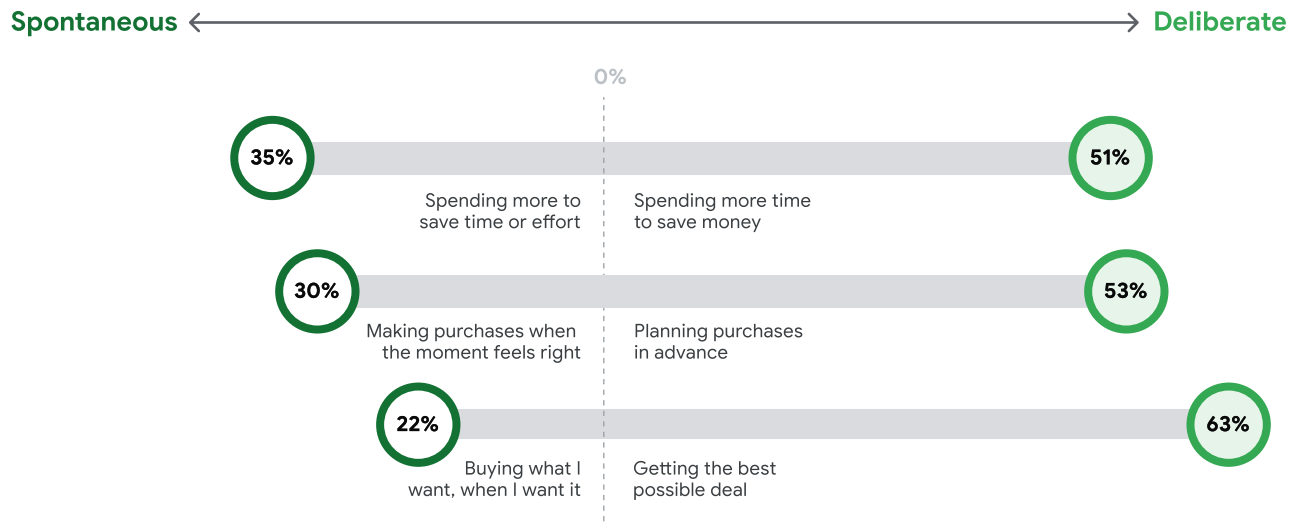
- Shoppers are entering the season with caution, reducing spontaneous purchases and increasing research.
- They seek multiple viewpoints across their purchase journeys and rely on multimodal search, AI, and video from discovery to decision.
- Shoppers now define value through three factors: price, product confidence, and purchase convenience.

The deliberate, research-driven shopper

Holiday shoppers are entering this season with heightened caution and making fewer spontaneous purchases. The majority of U.S. holiday shoppers are highly research-driven online, with 50% stating they conduct the same amount of prepurchase research as the rest of the year, and a significant 38% reporting they do even more.²

The deliberate holiday shopper

When shopping, which of the following do you value more when you have to choose between them?

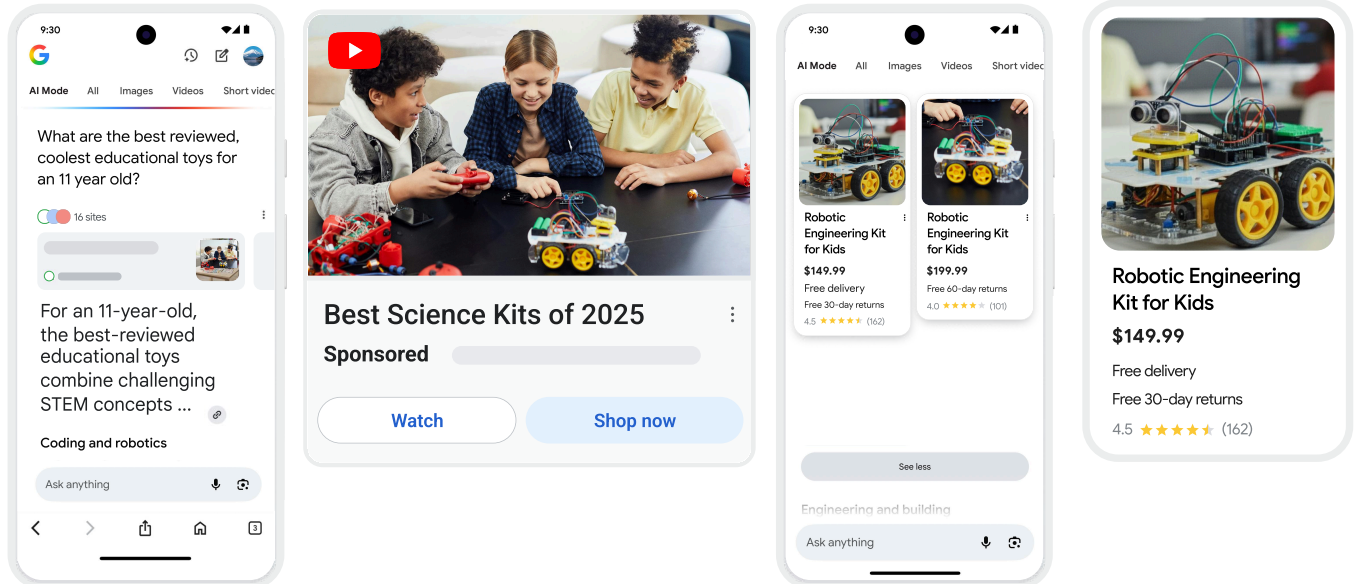


Source: Google-commissioned Economist Impact Future of Retail Marketing online shopper survey, AU, CA, DE, IN, UK, US, n=6,012 shoppers ages 18–65. July 2025–Aug. 2025.

Shoppers engage with multiple viewpoints and surfaces across their journeys

Today's shopper journeys are extended and complex. A majority of shoppers (61%) interact with 5+ touchpoints in their online purchase journeys; Google/YouTube are present in 86% of them.³ This is higher than any other online platform.⁴

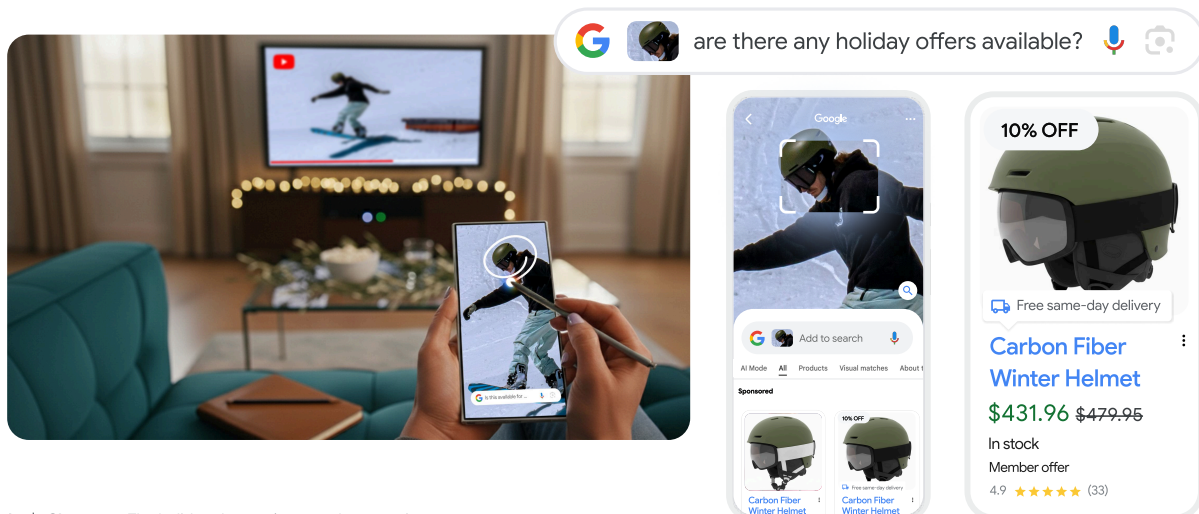
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Shoppers are also searching more naturally — through images, gestures, and conversation. Every month, Google Lens is used for more than 25 billion visual searches,⁵ with 1 in 5 of those searches showing commercial intent.⁶ And with Circle to Search, shoppers can search anything on their screens.

AI Overviews are also proving crucial to discovery: Already, almost 1 in 3 consumers who saw an AI Overview in their search results claim to have discovered a new brand, product, or retailer through it.⁷

Finally, [video plays a powerful role](#), as shoppers turn to reviews by trusted creators. Eighty percent of viewers in the U.S. agree that YouTube helps them make more confident shopping decisions.⁸



The new value equation

How consumers define ‘worth it’

Shoppers today are solving a complex equation for what “worth it” means. To feel confident in their spending, they validate choices across three key pillars.

The entry ticket

Right price

Nearly half of holiday shoppers will actively search for competitive prices and leverage major sales events to manage their budgets.⁹ Compared to a year ago, shoppers have become more deal driven, with 32% reporting they are buying when they see a discount becomes available, and 30% spending more time looking for promotions.¹⁰

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The differentiator

Product confidence

Once price is validated, decisions hinge on quality, durability, and brand trust. To validate these factors, consumers turn to Google Search and YouTube as their primary validation engines. Our research highlights, that even when discovery happens elsewhere, 70% of social media users use Google Search to inform and evaluate products discovered on social media.¹¹



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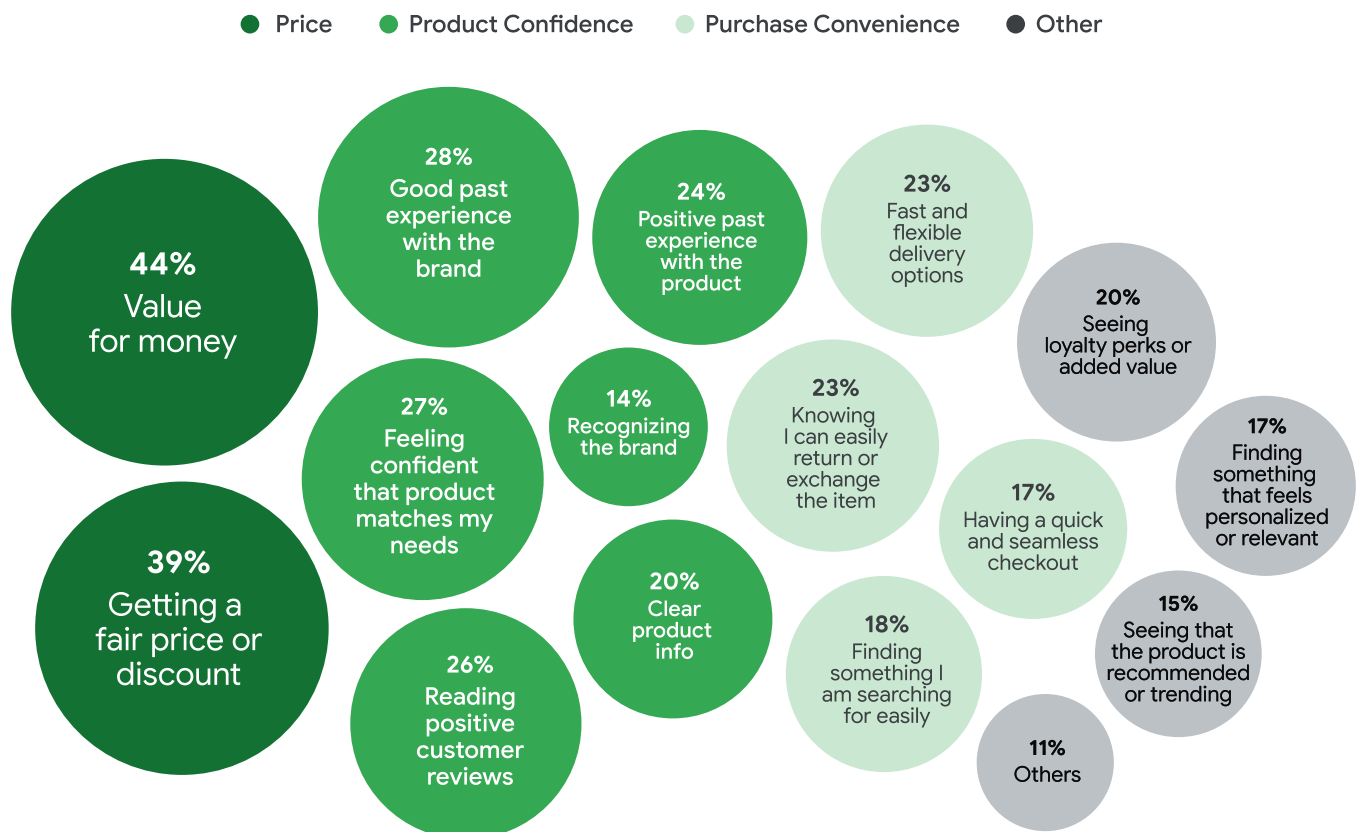
The clincher

Purchase convenience

Shoppers expect clear information, flexible payment, reliable delivery, and nearby pickup options. With the majority of U.S. holiday shoppers engaging in omnichannel behavior, their journey is rarely linear. They search online before 92% of store visits,¹² where a disconnect can derail a sale.

The value equation: What lies beneath

Compared to a year ago, which of the following factors have become more important in your decision to complete an online purchase?



Source: Google-commissioned Economist Impact Future of Retail Marketing online shopper survey, AU, CA, DE, IN, UK, US, n=6,012 shoppers ages 18–65. July 2025–Aug. 2025.

→ Up Next

We look at how marketers can meet these cautious, research-driven shoppers and move them from discovery to confident decision.



Chapter 2

How to win the season

EXECUTIVE SUMMARY

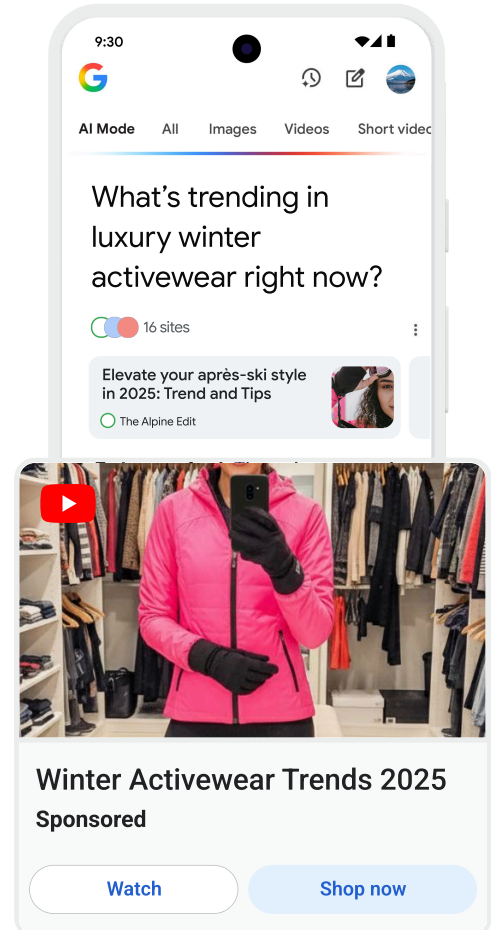
- This season, marketers are challenged with maximizing value with reduced budgets, delivering the highest possible ROI, and making responsible media investments across all channels.
- To win, it's critical to engage shoppers early, highlight product value, build trust, deepen loyalty, and remove friction across online and offline journeys.

Amid a complex consumer and business landscape, five strategies can help marketers win the season by meeting shopper expectations around price, product confidence, and convenience.

1. Engage users earlier in the season

At least half of holiday shoppers are making gift purchases at any given time, from October all the way to the new year.¹³ Your brand must be present with offers to meet shoppers wherever they are. At any point in the holiday season, Google and/or YouTube are consistently used by 4 out of 5 holiday shoppers. This has remained true for the past five years despite shoppers using more touchpoints and the emergence of new social media and shopping platforms.¹⁴

- Run always-on campaigns to capture intent across the extended season.
- Highlight long-term product value alongside seasonal promotions.
- Ensure discoverability on Search, Discover, and AI Overviews by keeping [Merchant Center](#) feeds and structured data accurate.



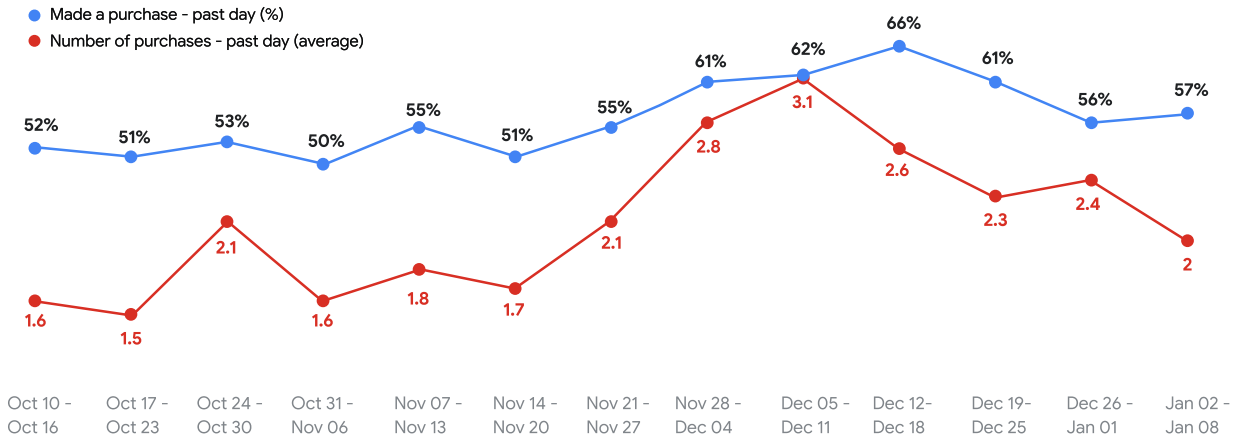
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Industry inspiration | Aritzia

Canadian fashion brand Aritzia anticipated demand for its Super Puff jacket as early as June. By leaning into AI-powered campaigns across YouTube, Demand Gen, Search, and Performance Max, it delivered record-breaking results — including a **42% lift in e-commerce net revenue** in Q4.

More than half of shoppers are purchasing at any given moment



Source: Google-commissioned Ipsos Holiday Shopping Study, U.S., online survey, n=540 consumers 18+ who conducted holiday shopping activities in the past two days, Oct. 2023–Jan. 2024.

2. Highlight value in your product mix, and make it discoverable across key surfaces

As shoppers extend validation cycles, it's critical to establish value across budgets and product categories.

- Highlight long-term value in product descriptions and creative, along with holiday offers.
- Ensure that your brand appears in Search, Discover, and AI Overviews by keeping product feeds accurate and consistent across your website, [Merchant Center](#), and structured data.
- Create engaging content for high-intent seasonal queries, such as “best gifts under \$100,” on conversion surfaces like your website’s landing pages or YouTube.



Industry inspiration | Boll & Branch

Luxury home goods company Boll & Branch used Performance Max to showcase its product bundles across all of Google and YouTube, encouraging shoppers to “buy the full bed.” The holiday push delivered **2X sales year over year during Cyber Weekend**, and drove **130% growth** in new customers on Google platforms.

Search is the no.1 way shoppers confirm facts like quality and durability, good reviews and ratings, and brand reputation.¹⁵

3. Build trust and confidence through Search and Video

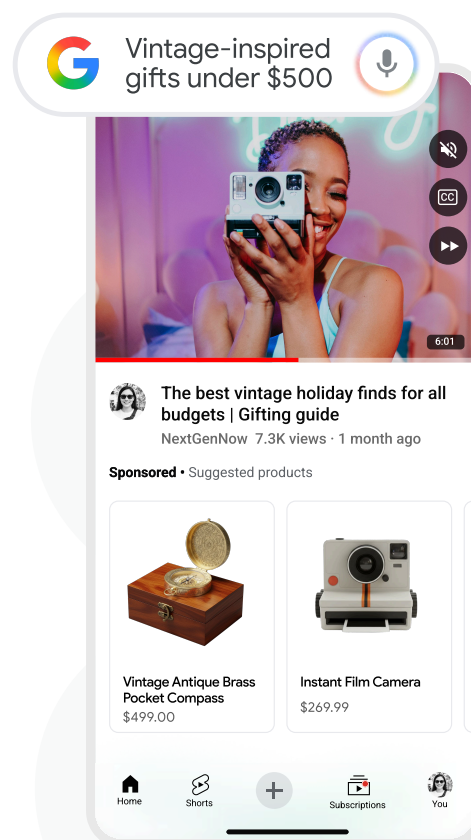
Beyond price, shoppers need proof. This is where validation engines like Search and YouTube play a crucial role. Search is the no. 1 way shoppers confirm facts like quality and durability, good reviews and ratings, and brand reputation.¹⁵ And according to a 2024 Traackr survey in the U.S., YouTube was ranked as the no. 1 choice for product reviews and product information by all consumers, including millennials and Gen Zs.¹⁶

- Use sale price, promotions, and other annotations in Merchant Center to highlight holiday offers alongside price and availability in Shopping results.
- Tailor video creative by context: Shorts for inspiration, livestreams for Q&As, long-form reviews for deep dives.
- Partner with trusted creators: 82% of viewers in the U.S. agree that YouTube has the most trusted creators.¹⁷

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Industry inspiration | Thumbtack

Online marketplace Thumbtack diversified beyond Search by experimenting with YouTube and Demand Gen. Supported by value-based bidding and customer lifetime value modeling, the test delivered a **2X return on ad spend (ROAS)** and **3.5% lift in service requests**, proving the incremental role of video-led discovery.



4. Deepen loyalty and nurture high-value customers

The holiday season is as much about retention as acquisition. Reengaging and rewarding loyal shoppers drives efficiency and long-term growth.

- Retain customers through deliberate engagement with the new retention goal in [loyalty mode](#).
- Personalize experiences with member-only pricing or shipping benefits [surfaced directly in Google listings](#).
- Connect offline outcomes with online campaigns through [Data Manager](#) to ensure AI optimizes for ultimate business goals.



Industry inspiration | L'Oréal

L'Oréal elevated its search strategy by integrating AI Max features like smarter matching, text customization, and final URL expansion. The test produced a **27% lift in conversion value** and a **20% boost in ROAS**, while uncovering net-new queries like “best cream for facial dark spots.”

5. Remove friction across online and offline journeys

A strong offer won't convert if the path to purchase is complex. Shoppers expect seamless convenience wherever they choose to buy.

- [Optimize campaigns](#) to drive shoppers in-store. Promote in-store deals alongside pickup options with geotargeted local ads.
- For online: Simplify checkout, highlight shipping speeds, and offer flexible returns.
- For in-store: Keep local inventory and store details accurate by linking [Google Business Profile](#) with Merchant Center.



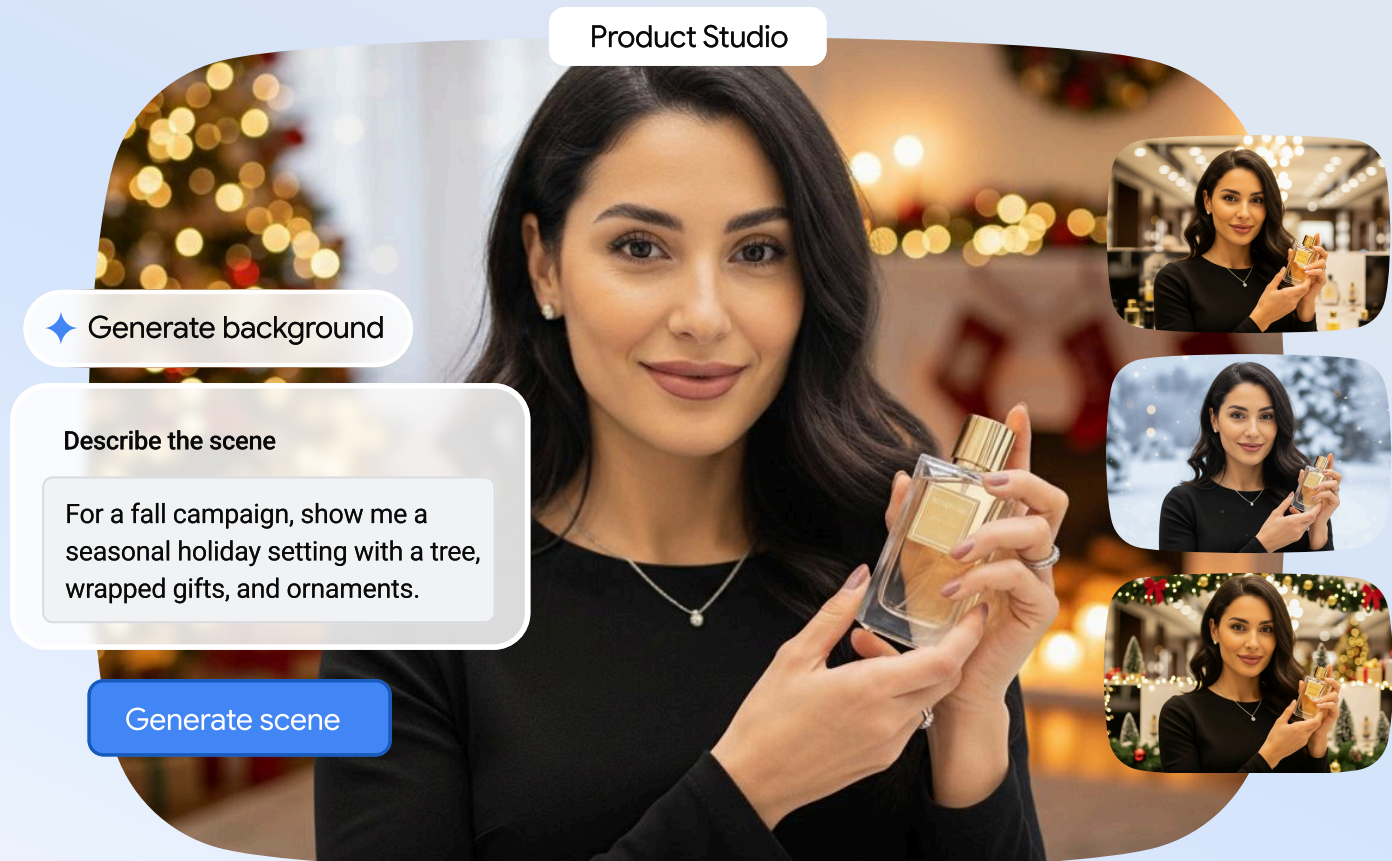
Industry inspiration | Jeep

Jeep focused on creative optimization with Performance Max to boost efficiency in a competitive auto market. In just one month, this AI-powered approach delivered a **133% increase in lead volume** while **reducing cost per lead by 43%**.



Up Next

How AI turns these strategies into outcomes through data, content, and performance.



Chapter 3

Your holiday AI essentials checklist

EXECUTIVE SUMMARY

- Holiday 2025 may be the first truly AI-powered season for many marketers.
- To compete, teams need to activate AI across three strengths: data, content, and performance.
- The checklist highlights immediate actions to drive holiday results and lay the foundation for 2026.

Last year, we introduced the [AI Essentials](#) to help marketers navigate the evolving AI landscape. To ensure you're equipped for the upcoming holiday season, we've updated the AI Essentials to include our newest solutions, designed to help you drive maximum ROI for your campaigns this holiday.

AI data strength

Identify your high-value shoppers and gain confidence in your ad spend with first-party data and measurement.

☐ Data

- Maintain your shopping feed by [analyzing performance data](#) and [updating product attributes](#) in Merchant Center to optimize across organic and ad surfaces.
- Connect your first-party data, and upgrade your tag in [Data Manager](#). Use data sources including your website and CRM to unlock new signals.

☐ Measurement

- Measure incrementality with [experiments](#) across many campaign types in Google Ads, with lower budget requirements and improved methodology.
- Optimize the full value of your budget with [Meridian](#) and [Budgeting Tool](#) in Google Analytics.

☐ Commerce Media suite

- Enable brands and retailers to convert customer intent into action at every stage of the journey, and track your results with our [Commerce Media suite](#).

AI content strength

Supercharge your AI with strong content and creative assets to deliver rich, relevant, and trusted content consumers are seeking.

☐ Content and SEO

- Create original, user-focused content for paid media, and leverage [Creator Partnerships](#).
- To [succeed with SEO in the AI era](#), craft helpful content, measure true value, aid crawlers, and build quality with AI.

❑ Creative development

- Create enhanced shopping content directly in Merchant Center. Discover suggested [images and videos generated for you](#), powered by Veo and Imagen.
- Use Merchant Center to shape your visual [brand profile on Search](#).

❑ YouTube Video reach and Video views campaigns

- Access format controls now available in [Video views campaigns](#).
- Maximize reach of your non-skippable ads with [Video reach campaigns](#).

AI performance strength

If you're a retailer, engage and convert shoppers with high intent during key decision moments with the **Power Pack**, your trifecta of AI-powered campaigns. Advertisers who adopt Performance Max alongside Demand Gen and Search campaigns see a median of 22% more conversions/conversion value at a similar CPA/ROAS.¹⁸

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❑ Search Ads

- Activate [AI Max for Search campaigns](#) to drive performance on new, relevant queries, and expand reach to AI surfaces with personalized creatives and landing pages in just one click.

❑ Performance Max

- Set up [asset best practices](#), like maximizing your asset variety, and opt into final URL expansion.
- Access [search terms and channel performance reporting](#) and diagnostics, along with new campaign controls (also available in [Shopping campaigns](#)) to optimize for acquiring new customers.
- Enable brand discovery with new shoppable formats in Performance Max, Shoppable CTV, and YouTube Shorts.

□ Demand Gen

- Set up [Lookalike segments](#) to grow your audience and adopt [video enhancements](#).
- Use [channel controls](#) to customize your media mix.
- Use the new customer acquisition goal and a seamless shopping experience on Shoppable CTV and YouTube Shorts to reach shoppers.

Agentic AI

Finally, encourage your team to harness agentic capabilities. Get personalized help from our [AI assistants](#) in Google Ads and Analytics, and for all your needs across the web.

Ready to **win the season?**

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