

Decoding the Q4 Shopper

Why Don't They Just Buy?

SAME SHOPPERS.

A DIFFERENT SEASON.



PEOPLE.
CULTURE.
CONTEXT.
CONVERSIONS.

Five quick things

- | | | |
|-----------|------------------|--|
| 01 | Q&A | Drop questions in the Q&A. We'll take them at the end. |
| 02 | RECORDING | The session is recorded and will be shared afterwards. |
| 03 | MUTE | Audience microphones stay muted during the session. |
| 04 | POLLS | We'll run polls throughout. Please jump in. |
| 05 | CONTACT | marketing@mcsaatchiperformance.com |



Today
we answer
three questions

01

When does the
season actually start?

02

Why do shoppers
stall?

03

What finally gets
them to buy?

MEET THE PANEL

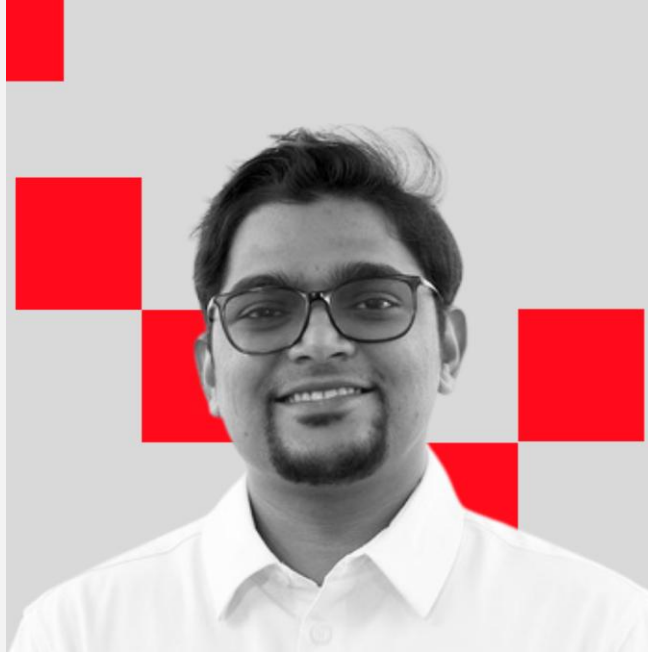


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Your festive campaign launches. It gets great reach, strong engagement and decent CTR. But conversions are lower than expected.

What's your first instinct?

A

The creative isn't right

B

The audience targeting is off

C

The timing is wrong

D

The offer isn't compelling enough

E

The shopper isn't ready yet

TIMING

The season starts early. The spend still peaks late.

Capture early intent. Stay invested for peak conversion.

46%

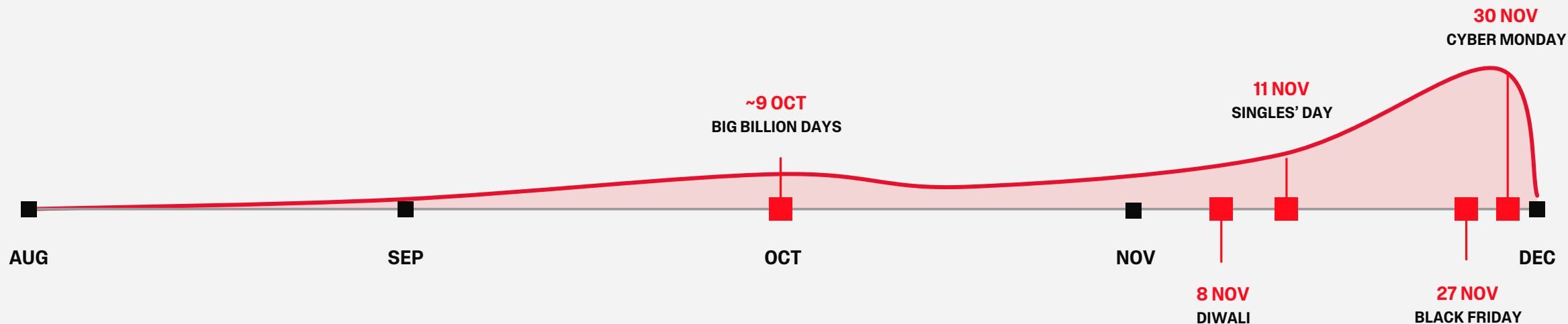
of UK shoppers start
before November

27%

make their first moves
in October

\$14.25B

Cyber Monday remained the
biggest online shopping day



Campaign architecture must reflect a stretched season, not one peak



AUG - SEP
AWARENESS



OCT
CONSIDERATION



NOV - DEC
CONVERSION

A stretched season creates more opportunities

TEST

Move 15-20% of peak budget into Aug-Oct and measure lift into peak.

The last click only sees the finish line.

Q4 intent is built across weeks, channels and signals.

SOCIAL DISCOVERY	VIDEO INTEREST	EMAIL NUDGE	SEARCH INTENT	PURCHASE CONVERSION
				

MTA restores credit to the touches that built intent.

LAST TOUCH
Sees the final step.

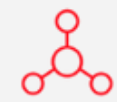
+50% Meta ROAS under MTA
+20% Snap ROAS on average



ENGAGEMENT DATA
Build audiences from where and when people engaged.



BEHAVIOUR SIGNALS
Use purchase + creative engagement data.



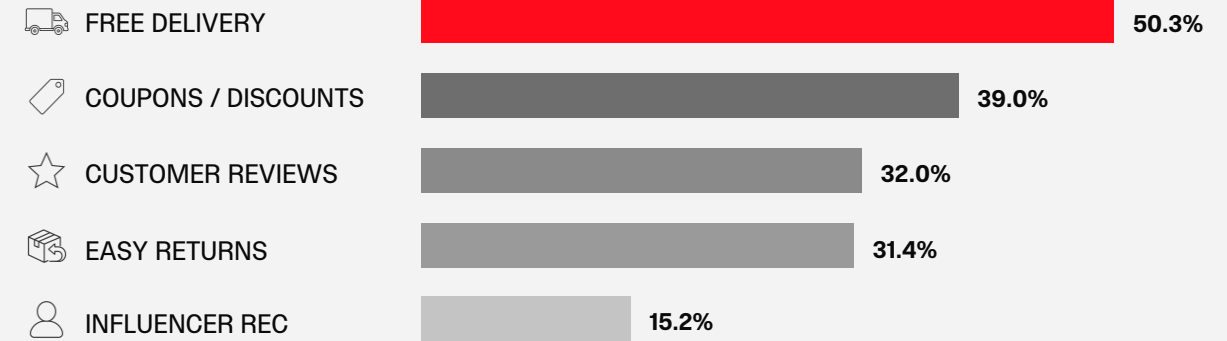
CHANNEL MIX
Check assists before cutting a channel.

STALLING

The festive season isn't lost at the top of the funnel.

It's lost in the gap between wanting something and buying it.

What gets shoppers **over the line**?



85%

are likely to abandon their carts due to frustration or indecision.

76%

feel overwhelmed by too many product choices.

89%

are searching for deals.

77%

are trading down.

Five Purchase Unblock Modes

01



50.3%

Friction-Averse

Free delivery, easy returns, quick checkout.

02



39.0%

Deal-Conditioned

Coupons, discount codes, credible offers.

03



49.3%

Evidence-Led

Research before buying, customer reviews, social proof.

04



45.5%

Brand-Anchored

Loyal to brands they like. Need presence and familiarity.

05



17%

Budget-Constrained

Spread payments, BNPL options.

Shoppers stall for three different reasons.

One message won't fix them all.

01



Price Stall

"I'll wait and see if it goes cheaper."

45%

plan to use credit to manage costs.

Discounts solve this one.

02



Choice overwhelm

"There are too many options."

76%

feel overwhelmed.

Simplify the choice.

03



Trust deficit

"Will it arrive?
Can I send it back?"

73%

of UK consumers are skeptical about the real value of festive discounts.

Reassure before you retarget.

Diagnose the stall, then build three creative tracks.

Message architecture needs to reflect the unblock mode

01

PRICE STALLER

Offers / Payment Options



Discounts



Buy now, pay later

02

CHOICE OVERWHELMER

Simplification



Gift guides



Bestsellers

03

TRUST STALLER

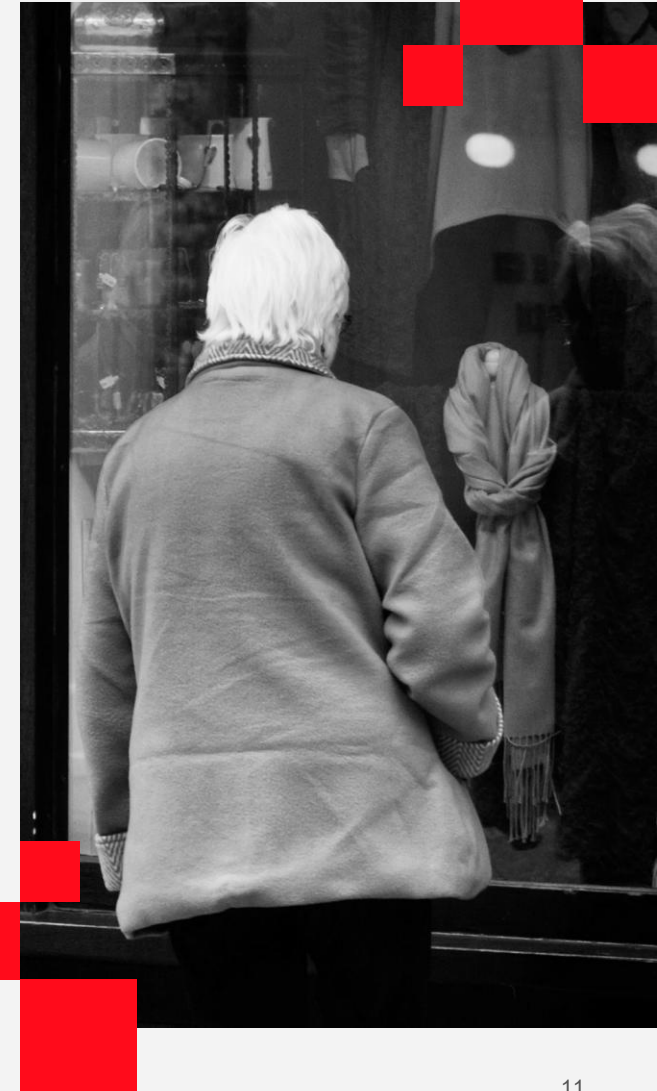
Reassurance



Reviews

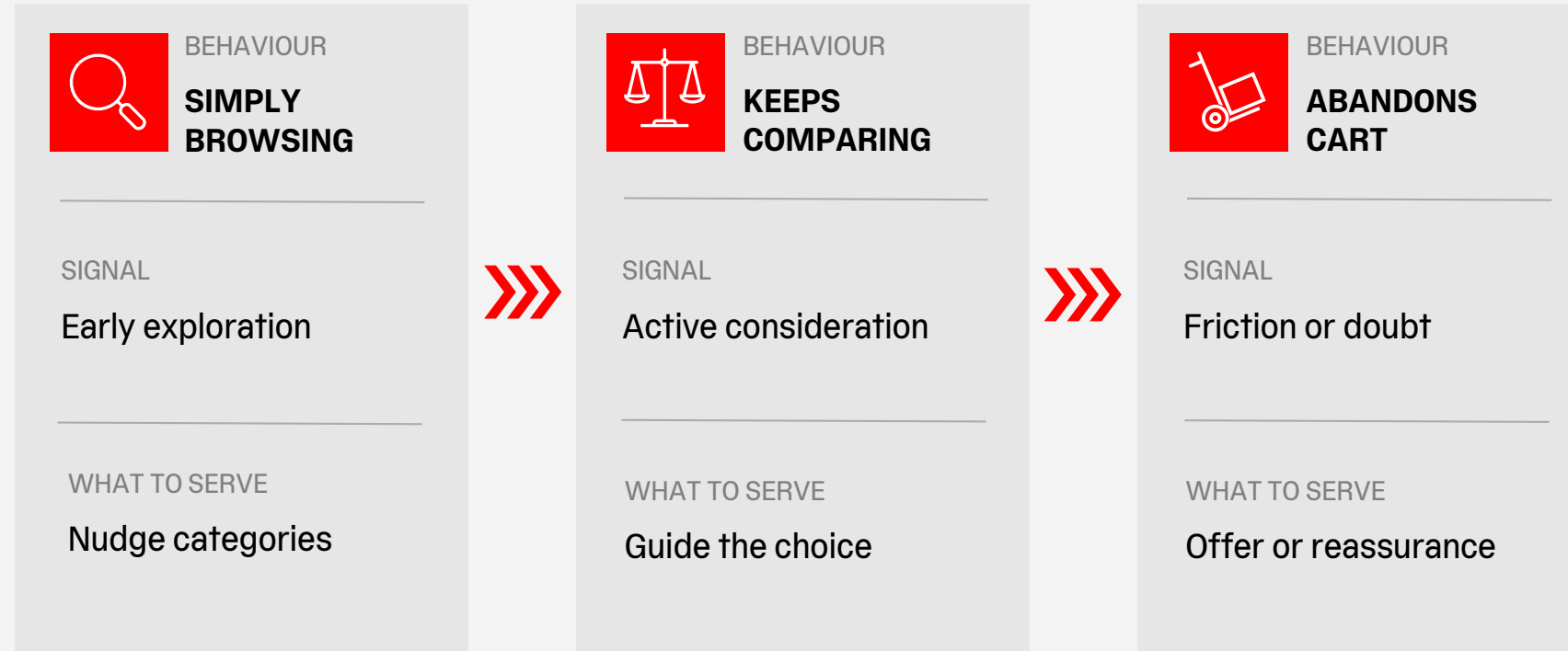


Easy returns



Browsing isn't hesitation. It's a decision in process.

Read the pattern before you read the message



WHAT GETS THEM TO BUY

Discovery, influence and purchase can happen in three different places.

Creators can spark discovery. The conversion tip often comes from proof, people or reassurance.

DISCOVER

58%

Gen Z: physical stores

55% Amazon • 54% TikTok / IG

DECIDE

>50%

turn to friends + family

35% brand / influencer posts •
21% paid ads

BUY

69%

Gen Z prefer online purchase

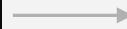
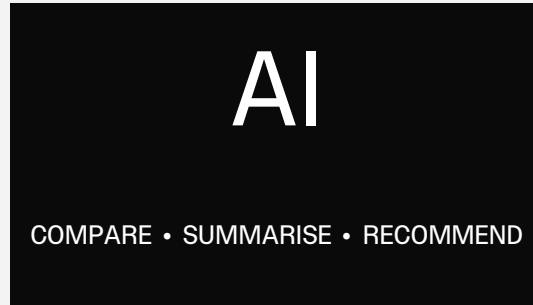
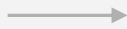
31% prefer physical stores

AI is becoming the shopper's comparison layer.

For brands, that means product data, reviews and delivery terms have to be legible to the machine too.

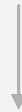
25.2%

used AI for personalized recommendations in the last month



+693%

YoY growth in traffic from generative AI tools to retail sites



~20% of 2026 holiday ecommerce traffic expected from AI agents



Four changes to make before peak.

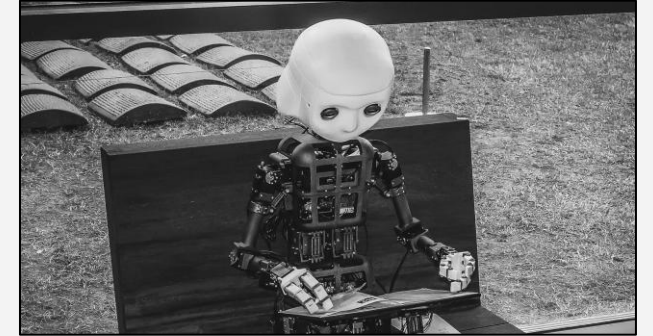
MEDIA

Separate discovery from conversion. Give them different KPIs.



CREATIVE

Build against the blocker. Make proof and product data AI-readable.



TARGETING

Layer life stage and household signals over generation alone.



MEASUREMENT

Tag AI referrals. Extend lookback windows. Use holdouts + incrementality



Good measurement starts before the sale.

01

MAP

Define the events
that matter



02

BENCHMARK

Know what “good”
looks like



03

ATTRIBUTE

Use MTA, audiences +
creative analysis



04

IMPROVE

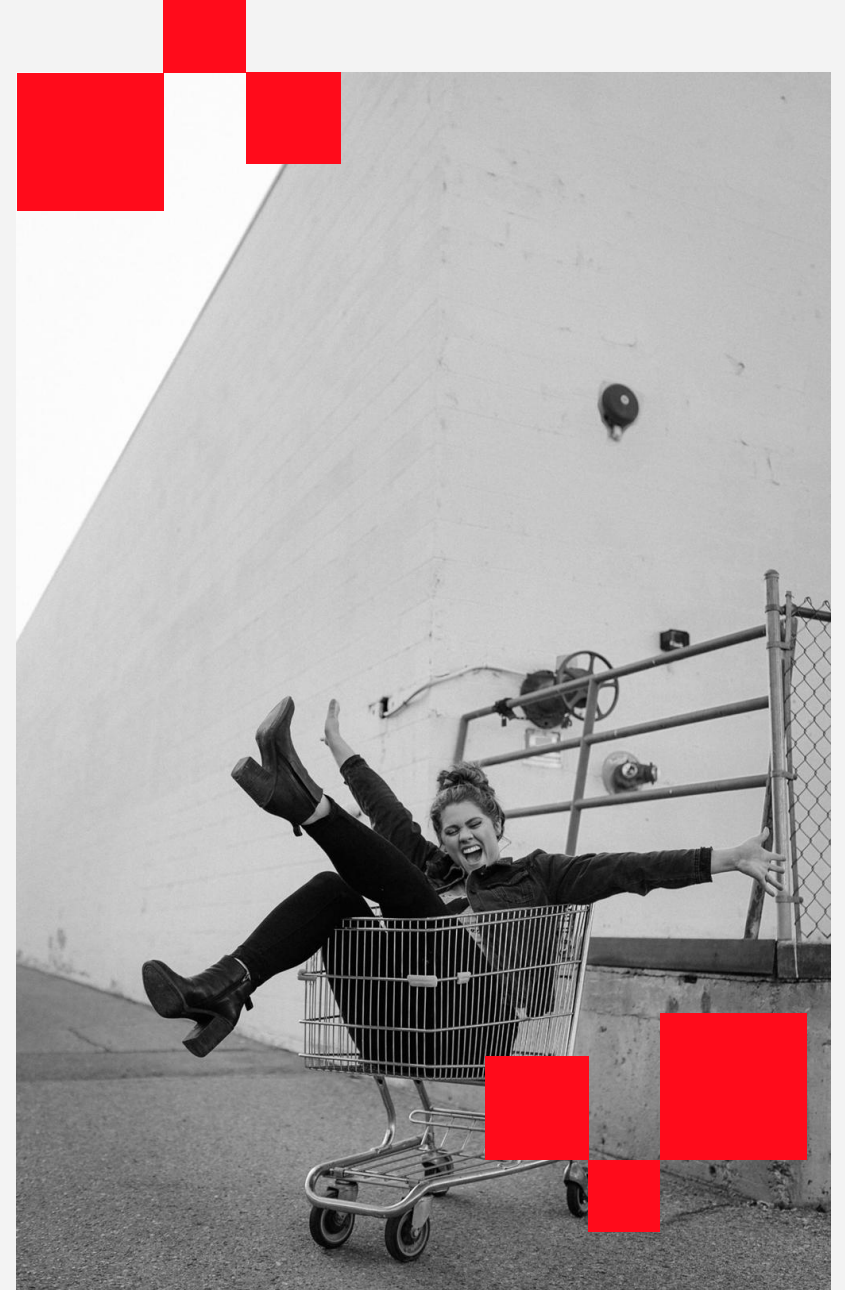
Keep feeding learnings
back into channel
decisions

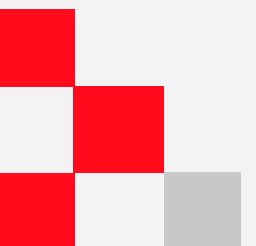
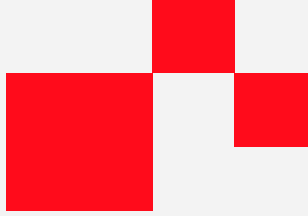


Questions?

Ask us about timing,
stalls, channels or
measurement.

No question is too tactical.





How did we do?

Thank you.

