



ADTRACTION

Q4 2025

E-commerce Insights

Quarterly trends and insights about category variations, consumer shopping habits, and device usage within online shopping in Europe

Welcome to

E-commerce Insights Q4 2025

The e-commerce landscape changes rapidly, and staying informed is essential. Our quarterly insights report offers a pulse check on the European e-commerce industry, with key insights into category variations, consumer shopping habits, and device usage trends within online shopping.

Each edition of the report features commentary from three of Adtraction's markets, with the aim of providing local perspectives on evolving trends and regional market dynamics.

About the data

The report is based on data sourced from more than 900 e-commerce programs across Adtraction's 12 European markets.

For clarity and ease of comparison, we employ index scales in some of the included graphs. 100 signifies the average of the metric applied, while values above 100 are higher than average and values below 100 are lower.

We hope you find it useful!





Fair and reliable tracking in Italy

Across Europe, including Italy, tracking and consent are becoming critical topics for partner marketing. Traditional tracking is becoming less reliable as privacy rules tighten, browsers restrict cookies, and more user journeys happen without a measurable click.

“As the consent gap grows, partners risk not being compensated for the value they create”

While brands still benefit from these sales, gaps in tracking can weaken trust in the channel. This is driving a shift towards more robust and compliant setups. Where gaps remain, brands need to acknowledge them and ensure partners are treated fairly. In 2026, sustainable growth in partner marketing will depend on transparency, fair tracking practices, and attribution models that reflect real value, not just what can be measured.

To address this, Adtraction has launched Fair Tracking, an initiative focused on improving transparency and trust in how partner performance is measured.



Julien Tinti

Country Manager, Adtraction Italy

Brand stores growing in importance in Norway

Brand stores are becoming a stronger force in Norway, even in categories traditionally dominated by multi-brand retailers. In fashion, they now account for a growing share of sales, while some multi-brand retailers are losing ground. In health and beauty, multi-brand retailers still lead, but brand stores are expanding quickly from a smaller base.

This shift is driven by clearer ownership of the customer relationship, stronger brand loyalty, and better control over margins. As attribution becomes less precise, brands closer to the transaction are gaining importance. For partner marketing, this means a shift towards brand-led partnerships rather than reseller-driven ones. In 2026, this will influence how partner marketing creates growth in Norway, with brand stores playing a more central role in building direct customer relationships.



Øivind Brunsell

Country Manager, Adtraction Norway

Partner marketing for AI visibility in Sweden

Search is changing as AI-driven answers become a bigger part of how consumers find products and brands. Instead of relying mainly on owned content, brands increasingly gain visibility through trusted third-party channels such as media, comparison sites and product reviews.

This makes partner marketing an important driver of AI visibility. Partners provide the external credibility AI systems use when deciding which products and brands to recommend. As AI-generated answers increasingly replace traditional search results, being referenced matters more than driving clicks. Visibility now comes from being included in the sources AI trusts. In 2026, Swedish brands will benefit from investing in high-quality partnerships that strengthen their presence in trusted AI sources.



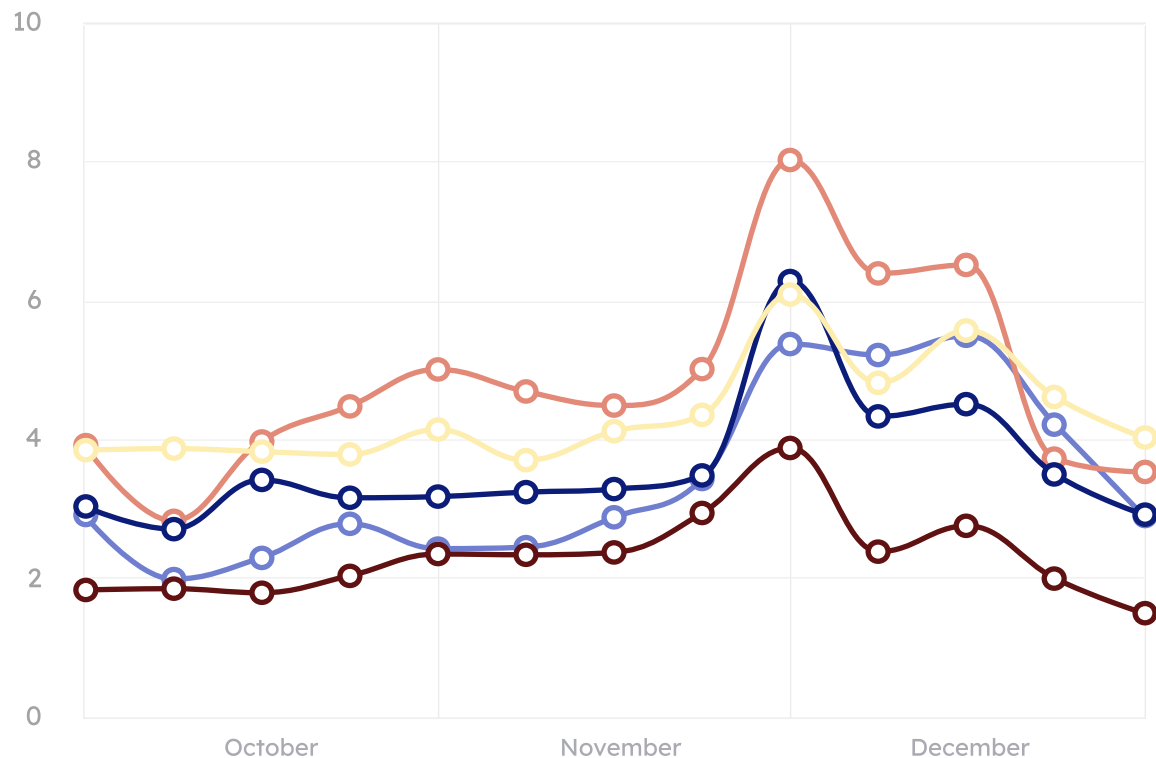
Anna Johansson

Country Manager, Adtraction Sweden



Conversion rate

By percentage, %

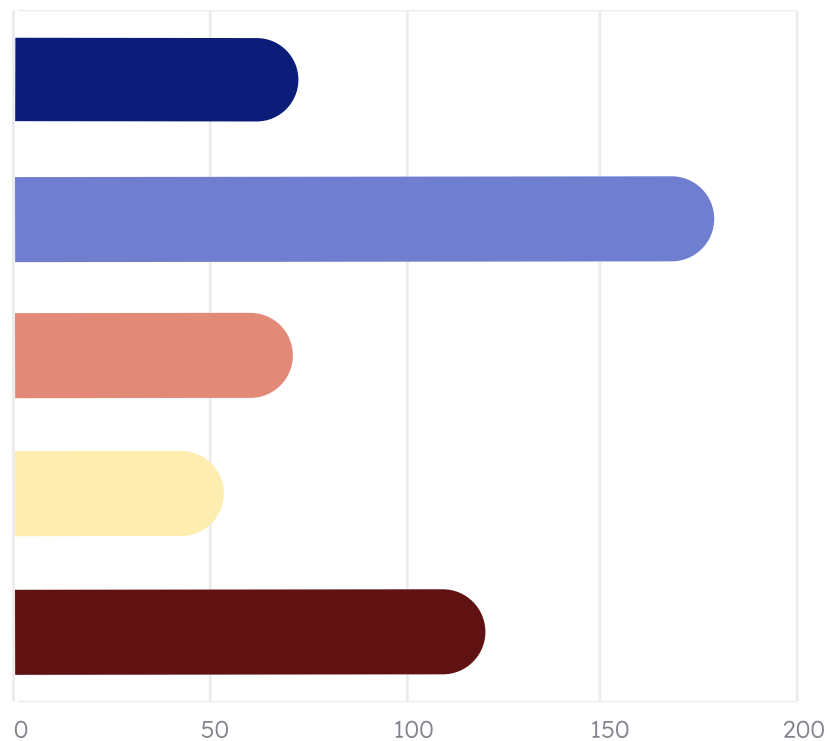


All categories peak during Black Week towards the end of November. Kids & family reaches the highest conversion rates, peaking at around 8%, followed by Beauty at 6%.

● Fashion ● Electronics ● Beauty ● Interior ● Kids and family

Average order value

Index = 100

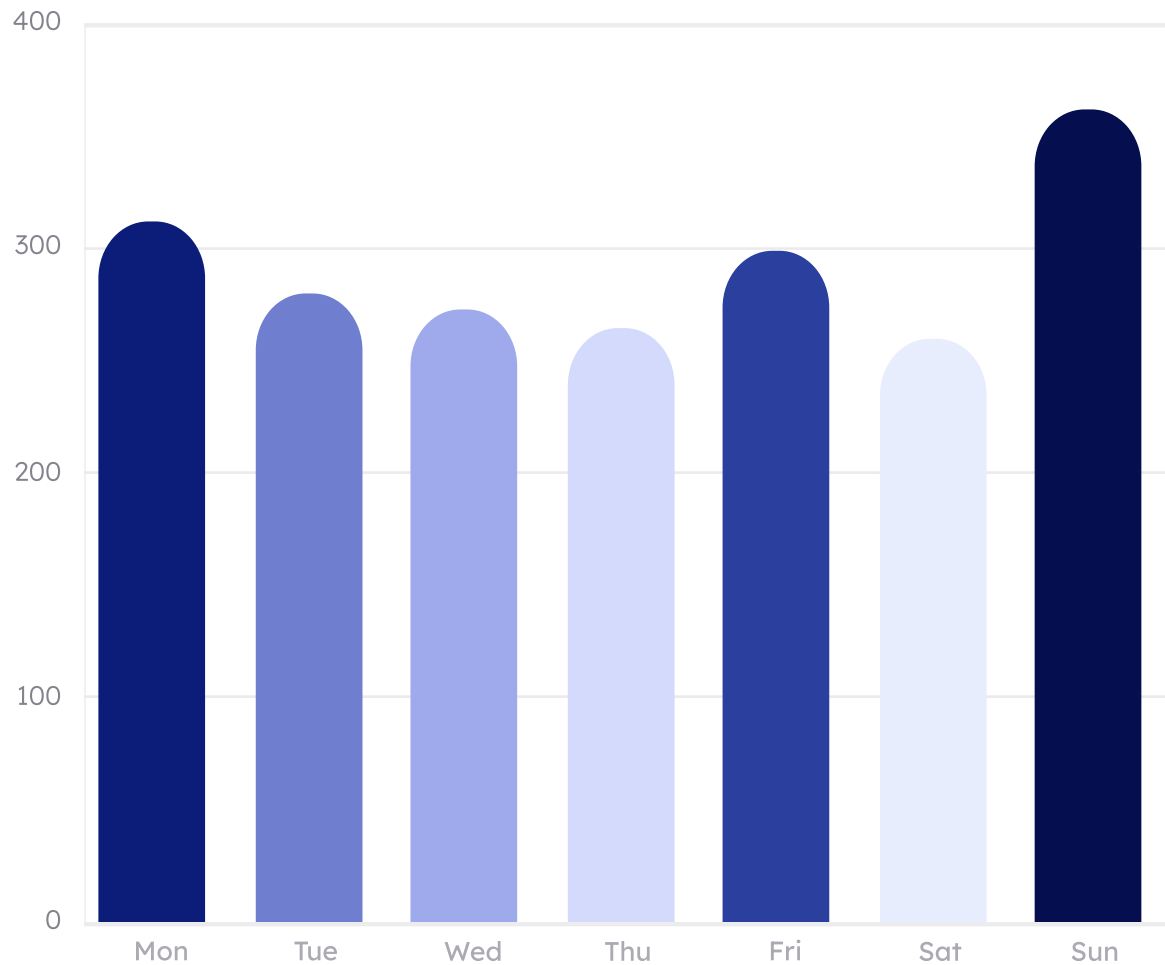


Electronics continues to lead with the highest average order value in Q4, followed by Interior. Fashion, Kids & family, and Beauty remain below the overall index.



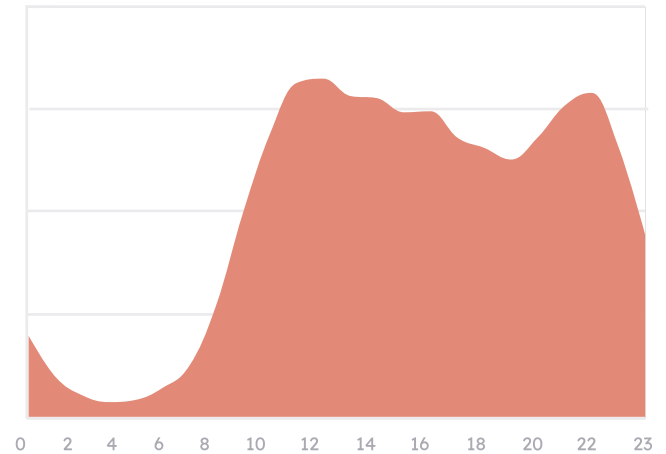
Average shopping week

Sales volume, Index = 100



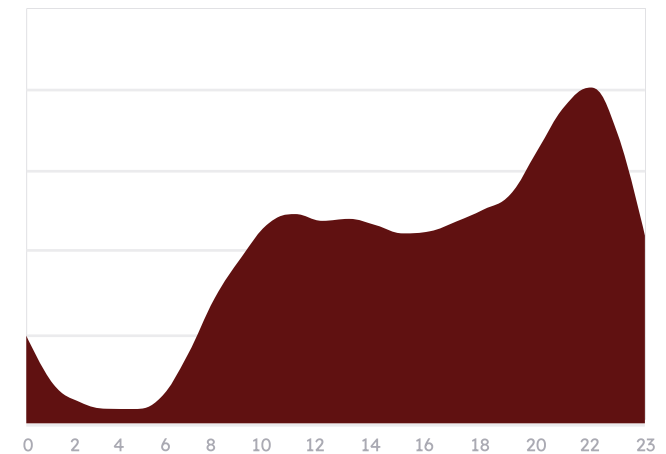
Sunday is the most popular shopping day in Q4, followed by Monday and Friday. Activity gradually slows from Tuesday to Thursday, while Saturday has the lowest sales volume.

Desktop: Average shopping day Index = 100



Desktop shopping peaks around midday. Activity decreases in the afternoon, with a rise later in the evening.

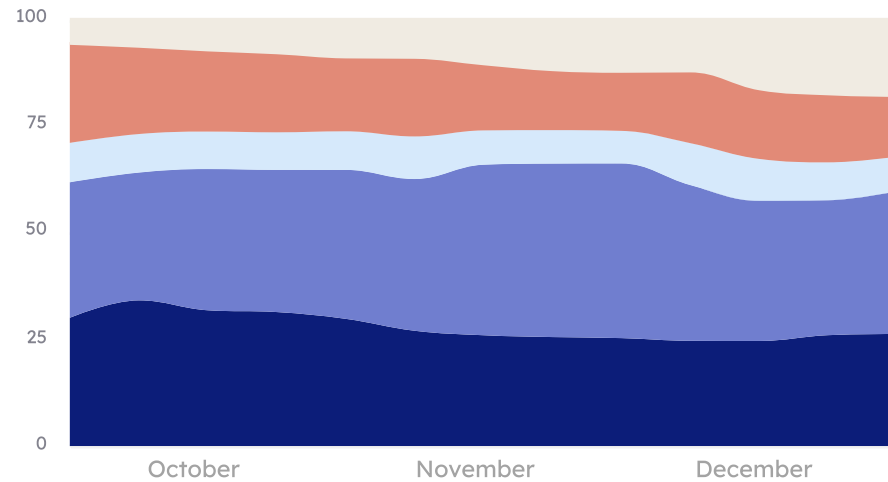
Mobile: Average shopping day Index = 100



Mobile shopping peaks late in the evening, reflecting strong mobile engagement outside of working hours.

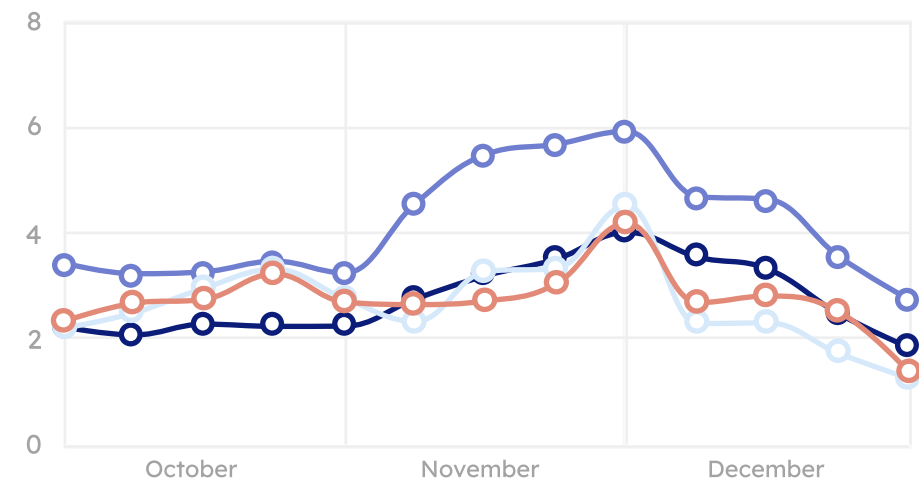


Share of clicks By percentage, %



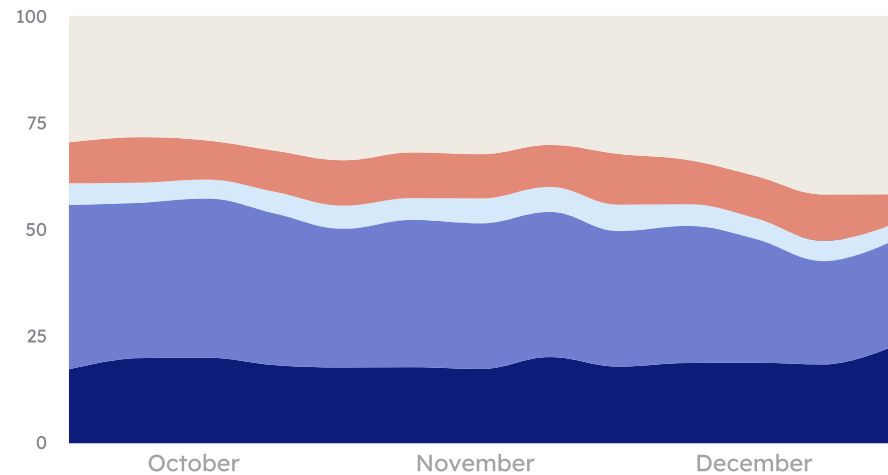
iPhones generate the largest share of clicks in Q4, followed by PC.

Conversion rate By percentage, %



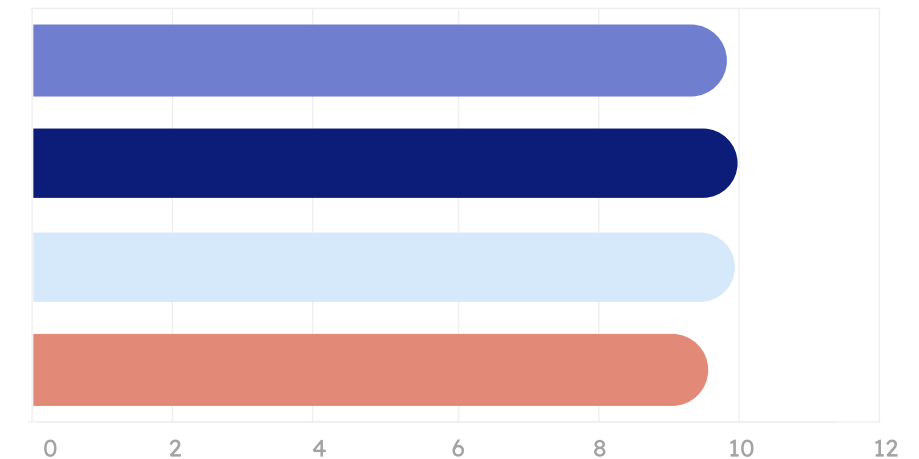
Conversion rates increase across all devices during late November, peaking around Black Week. iPhone users maintain the highest conversion rate throughout Q4.

Share of transactions By percentage, %



iPhones continue to account for the largest share of transactions in Q4, followed by Android. PC and Mac remain stable but represent smaller portions.










Median time from click to order By minutes



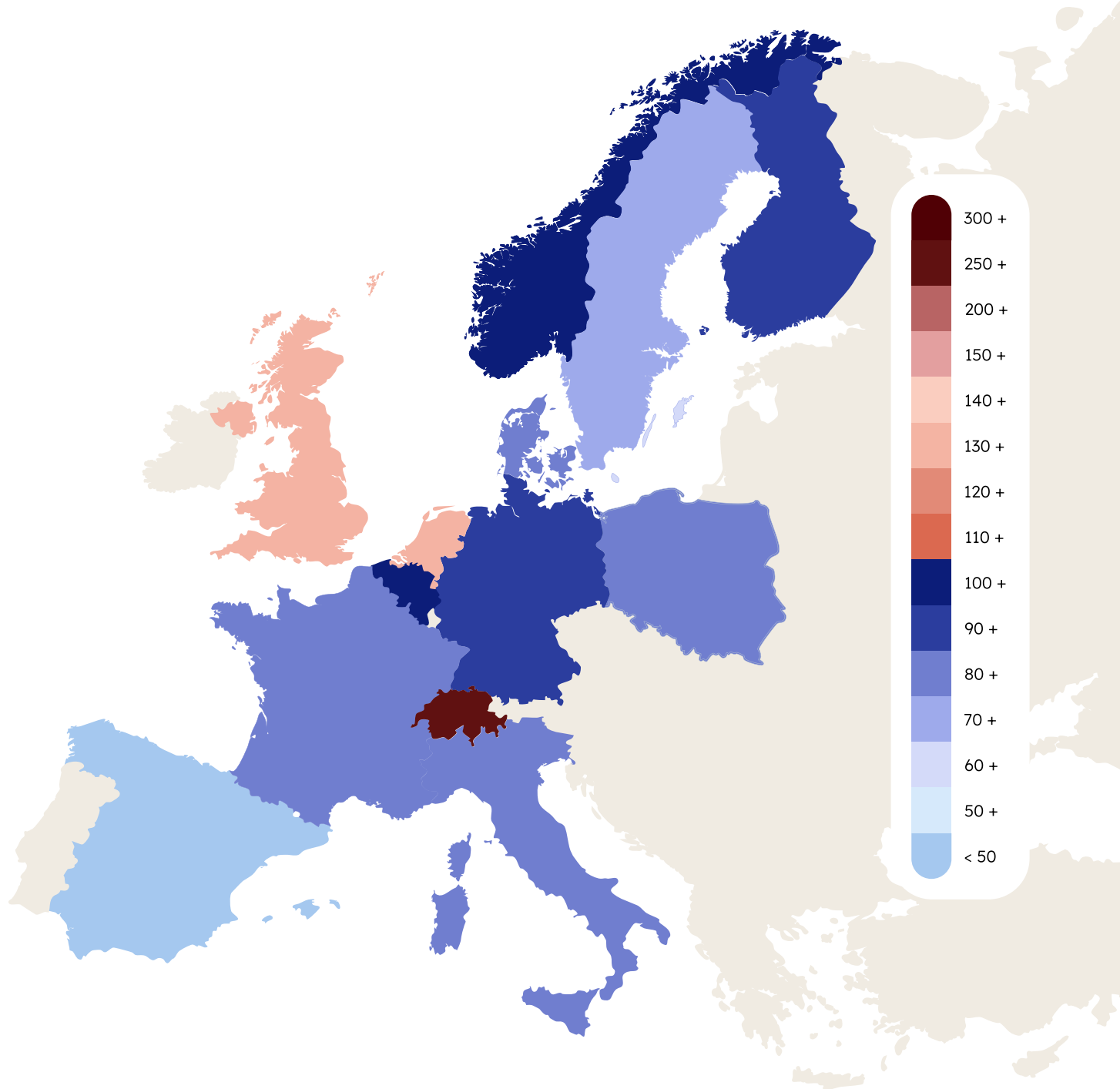
All devices take about 9-10 minutes from click to order. PC users convert the fastest.

PC Mac iPhone Android Other

Average order value By market

	Switzerland	282
	United Kingdom	131
	Netherlands	130
	Belgium	106
	Norway	103
	Finland	96
	Germany	92
	France	88
	Denmark	87
	Italy	81
	Poland	80
	Sweden	77
	Spain	41

Index = 100



Black Week

For most e-commerce brands working with Adtraction, November and December are the busiest months of the year.

During Black Week in November, we took a deep dive into our own data and shared some key insights during the week.

From Monday to Thursday, we explored the busiest shopping hours of Black Week. The top-right graph shows sales volume by hour, showing a steady increase throughout the morning before settling into a more even rhythm in the middle of the day.

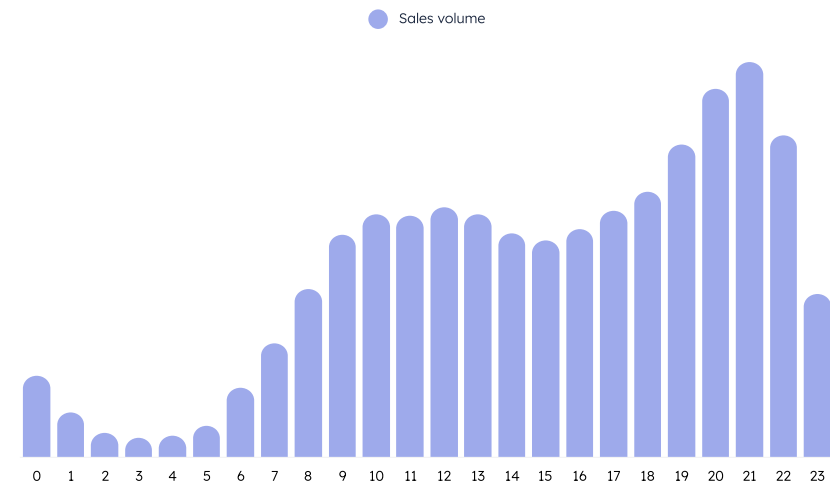
One example of how brands can take advantage of the peak shopping hour trends, is by scheduling campaigns, flash sales, or email reminders a few hours before the peak to boost sales.

We also analysed daily device usage from Monday to Thursday during Black Week. The lower graph illustrates conversion trends by device type. While mobile shopping clearly peaks in the evening, desktop remains more stable throughout the day. This suggests that although mobile leads the way, desktop still plays an important role for browsing, comparing options, and completing certain purchases.

The data highlights the need to stay focused on mobile, while also ensuring a smooth experience across devices. Shoppers switch between mobile and desktop, so it should be easy to browse and buy wherever they choose to start.

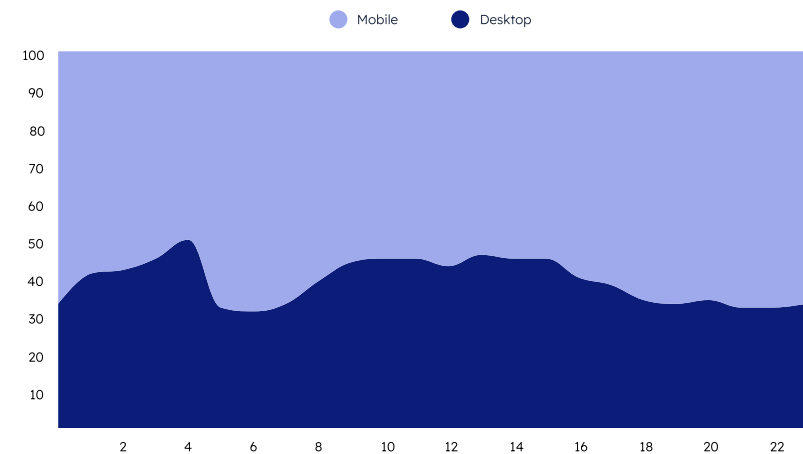
We've summarised all the data on [our blog](#), and you can find each post with more details on our [LinkedIn page](#).

Sales volume By hour, Monday to Thursday



Sales volume during the day from Monday to Thursday of Black Week showed a steadily increase throughout the morning before settling into a more even rhythm in the middle of the day.

Sales volume By device and hour, Monday to Thursday



Mobile is still the dominant device during Black Week, driving most of the traffic and sales, especially in the evening hours when fewer people are at their desktops.

About Adtraction

Adtraction is a full-service partner marketing platform, helping brands attract new customers and sell more, while helping partners monetise their content and traffic. The company works with brands across multiple industries, ranging from e-commerce to financial services. With a user-friendly platform, Adtraction connects brands with a diverse range of marketing partners, ranging from content sites, influencers, affiliates, mobile apps and comparison sites.

The company was established in 2007 and is headquartered in Stockholm, Sweden, with offices in 12 locations across Europe.

About the data

The data used for the report comes from more than 900 e-commerce programs across Adtraction's 12 European markets.

Some of the graphs utilise an index scale for ease of interpretation. The index is set at a baseline value of 100, which represents the average of the data points included in this analysis. Each data point on the graph is then expressed relative to this average.

Values above 100 indicate performance or measurements that are above the average, while values below 100 suggest performance or measurements that are below the average.



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