

PACVUE | Helium 10

2025 Cyber 5 Benchmark Report

Amazon Ads, Walmart Connect



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The 2025 holiday season offers valuable insight into how evolving shopping behavior is shaping retail media performance. As consumers increasingly discover products through social platforms, creator content, and AI, brands are adapting to meet audiences across more touchpoints than ever. This report explores how those behaviors translated into ad performance across Amazon, Walmart, and Target during Cyber 5, breaking down trends in spend, CPC, ROAS, and conversion heading into 2026.

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Key Findings for Cyber 5 2025

Brands invested heavily in this year's Cyber 5 weekend, but efficiency proved hard to maintain.

Across Amazon, Walmart, and Target, brands ramped up spend heading into Black Friday and Cyber Monday. Sponsored Products, Sponsored Brands, and DSP all showed strong increases, signaling full-funnel investment. But this surge came with rising CPCs and, in some cases, weaker ROAS. This highlights a broader trend: sustainable growth depends more on smarter targeting and differentiated strategies than on budget scale alone.

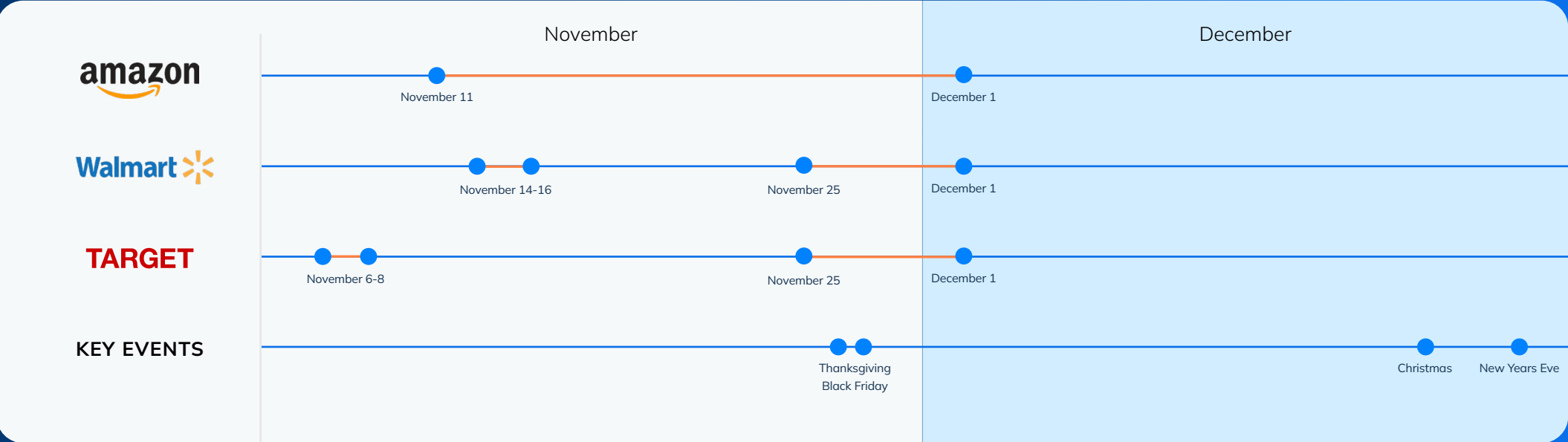
DSP and full-funnel activation were critical to advertisers' Black Friday - Cyber Monday strategies.

Across Amazon, DSP spend increased YoY, and Sponsored Brands saw substantial WoW CPC growth as advertisers pushed harder into upper-funnel tactics to influence early consideration during high-traffic periods. This reflects a broader market pivot toward discovery commerce, where platforms like TikTok influence early purchase journeys. Retail media advertisers are responding by investing earlier and higher in the funnel to stay competitive.

Necessity and value-oriented categories outperformed, while discretionary categories saw heavier auction pressure.

During this Cyber 5 weekend, shoppers gravitated toward categories they rely on year-round. On Amazon, Pet Supplies and Baby Products saw major CPC increases, while necessity-driven categories like Grocery and Health & Household saw high CVRs and ROAS. At the same time, advertisers in competitive discretionary categories had to spend more aggressively to win share. This aligns with broader consumer patterns around value-seeking and prioritization of essentials.

Cyber 5 | Promotional Windows



AI Spotlight

How AI + Discovery Commerce Are Changing Holiday Shopping

As AI and discovery commerce reshape how consumers find, evaluate, and purchase products, the shopping journey is undergoing one of its biggest transformations yet. The 2025 holiday season offers an early read on how quickly behavior is changing – and what it means for ad performance:

- **AI simplifies complex decisions in research-heavy categories.** Electronics shoppers often face long lists of options with technical differences that benefit from AI tools summarizing specs and reviews. This pattern showed up during Cyber 5, where CPC fell –7.75% YoY, while both ROAS (+15.19%) and CVR (+2.77%) increased. Lower costs paired with stronger efficiency suggest shoppers arrived with clearer intent and needed fewer interactions to find the right item.
- **AI helps translate subjective claims into clearer guidance.** In Beauty & Personal Care, shoppers often weigh subjective claims like finish, texture, and skin type. AI tools that distill review themes and highlight relevant benefits can help narrow choices sooner. Cyber 5 performance reflected this: CPC decreased –3.70% YoY, ROAS improved +3.70%, and CVR edged up +0.61%, pointing to more efficient exploration and better-matched product selection.



- **Social trends shape demand.** Clothing, Shoes & Jewelry remains one of the most discovery-driven categories, shaped by creator content, social trends, and TikTok inspiration. When shoppers already know what style or item they're seeking, they come to Amazon more prepared. During Cyber 5, this category saw a sharp CPC decline of –16.52% YoY, alongside higher ROAS (+4.22%) and higher CVR (+2.77%), signaling more decisive shopping behavior.
- **Discovery commerce is influencing early demand signals.** For Toys & Games, inspiration often begins far upstream—through creator lists, TikTok trends, and holiday gift roundups. This led to more efficient traffic during Cyber 5 (CPC –4.21% YoY, ROAS +4.01%), even though CVR fell (–14.49%), indicating that shoppers arrived with interest sparked elsewhere but were still narrowing down choices once they reached Amazon.

These trends point to a holiday shopper who arrived on retail platforms better informed and more influenced by what they encountered upstream. AI is helping reduce friction in research-heavy categories, while discovery commerce is shaping early demand through creators and social trends. During Cyber 5, this translated into lower costs and improved efficiency, offering an early signal of how shoppers may continue to evolve in 2026.

How Brands Can Adapt

Brands are scaling their use of AI and discovery channels to work faster, spend smarter, and respond to demand in real time. Here are three ways to keep up in 2026:

- **Optimize for AI discovery.** Write clear, use-case-driven titles and bullet points, upgrade A+ content with FAQs and comparison charts, and answer real shopper questions directly on PDPs to align with AI-driven search and recommendations.
- **Build campaigns faster with Pacvue + Amazon AI.** Use Pacvue's AI keyword recommendations to align spend with high-intent queries, leverage campaign templates driven by historic performance and ad type, simulate outcomes with AI-powered forecasting, and tap into AMC to define precise audience segments.
- **Activate off-Amazon demand via TikTok Shop.** Identify trending products and creator-driven demand, then use Pacvue's TikTok Shop integration to connect social discovery to conversion. Scale bids and budgets around discovery moments, reinforce visibility for products gaining social traction, and track sales halos across Amazon and other retail platforms.

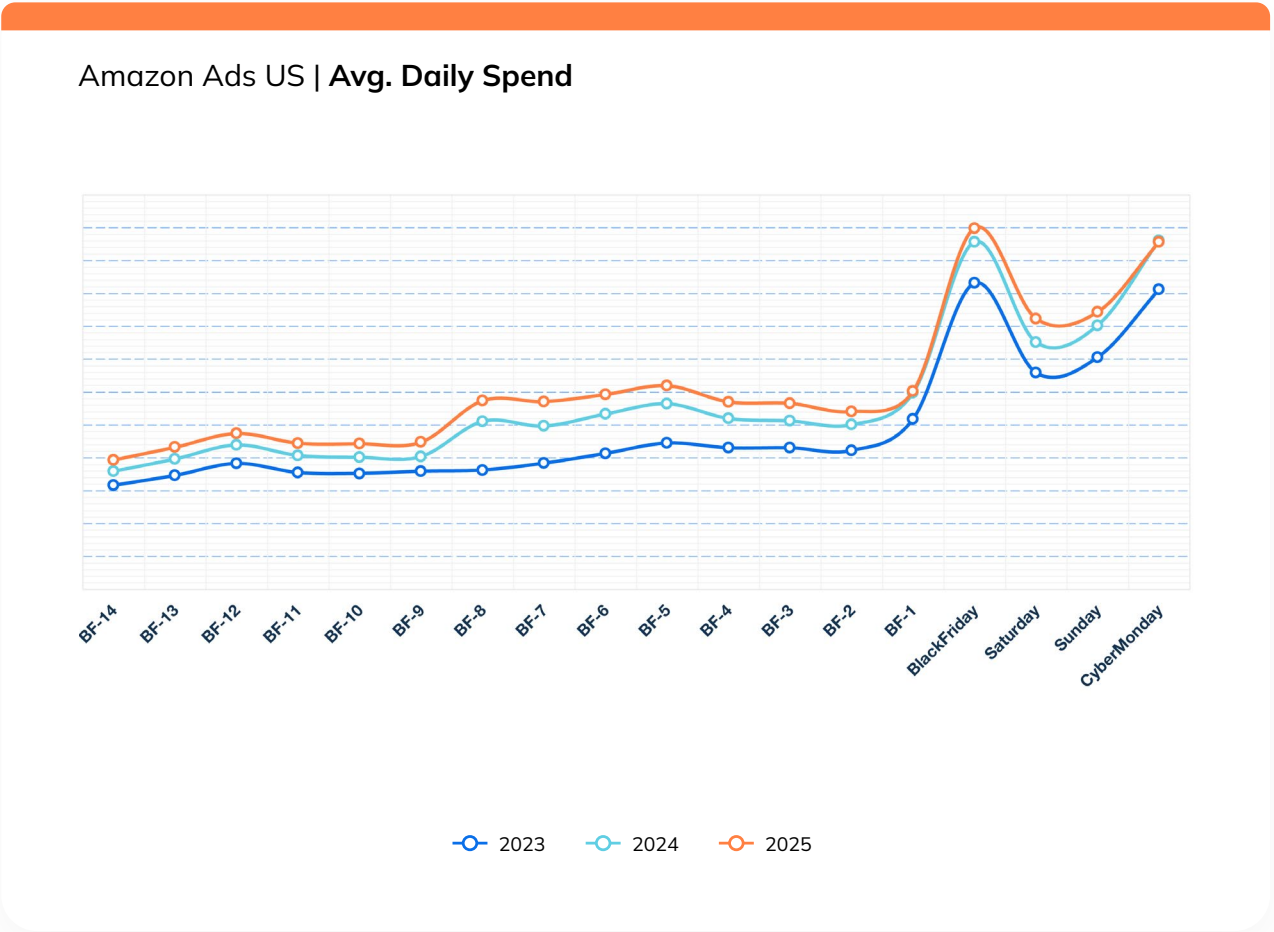
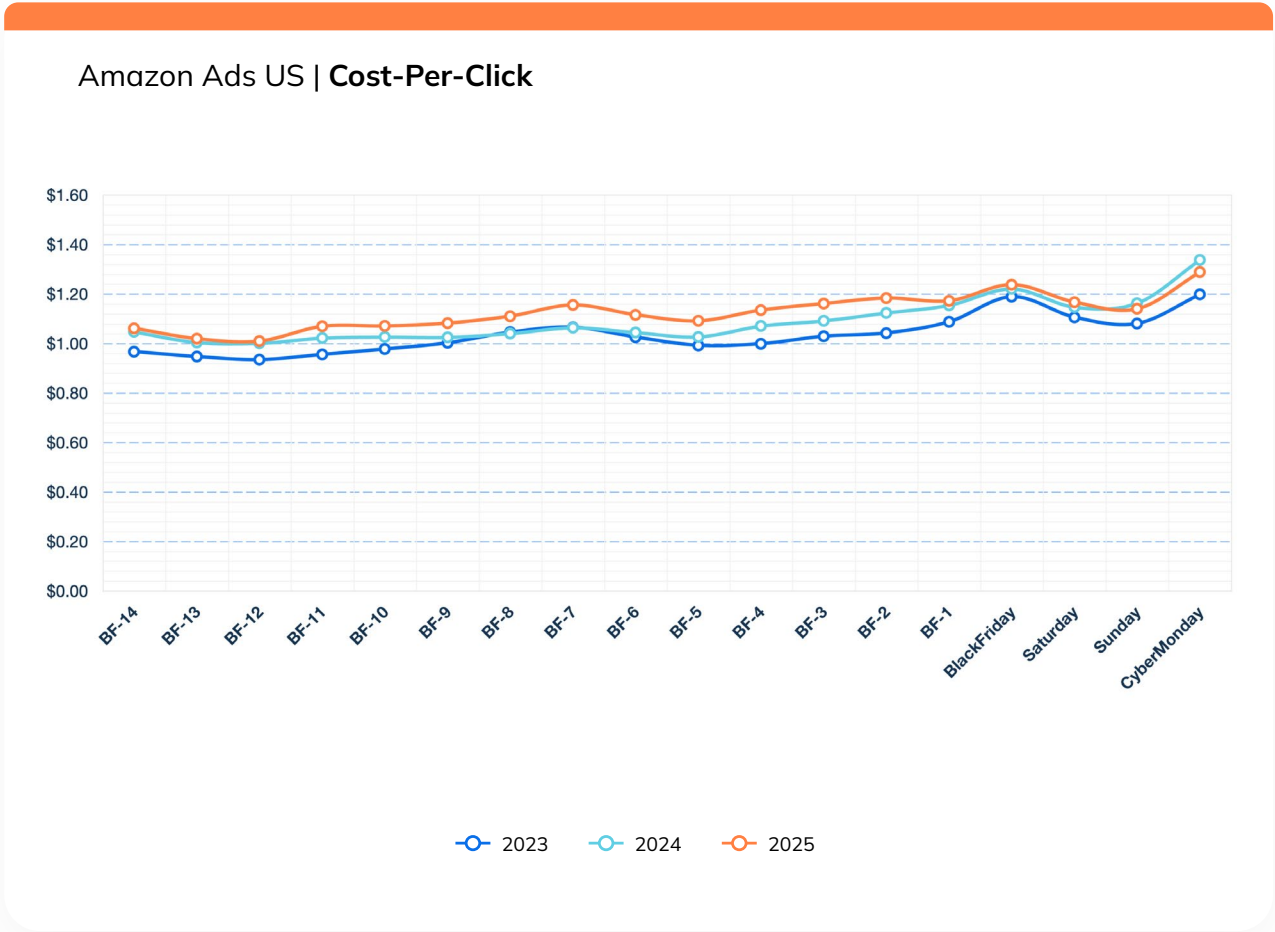


Amazon Ads US

Sponsored Brands, Sponsored Products,
DSP, Category Insights

Spend and CPC Trends

Amazon Ads US | Sponsored Brands & Products



Sponsored Products

+4.4%

Average Daily Spend
(Black Friday YoY)

Sponsored Brands

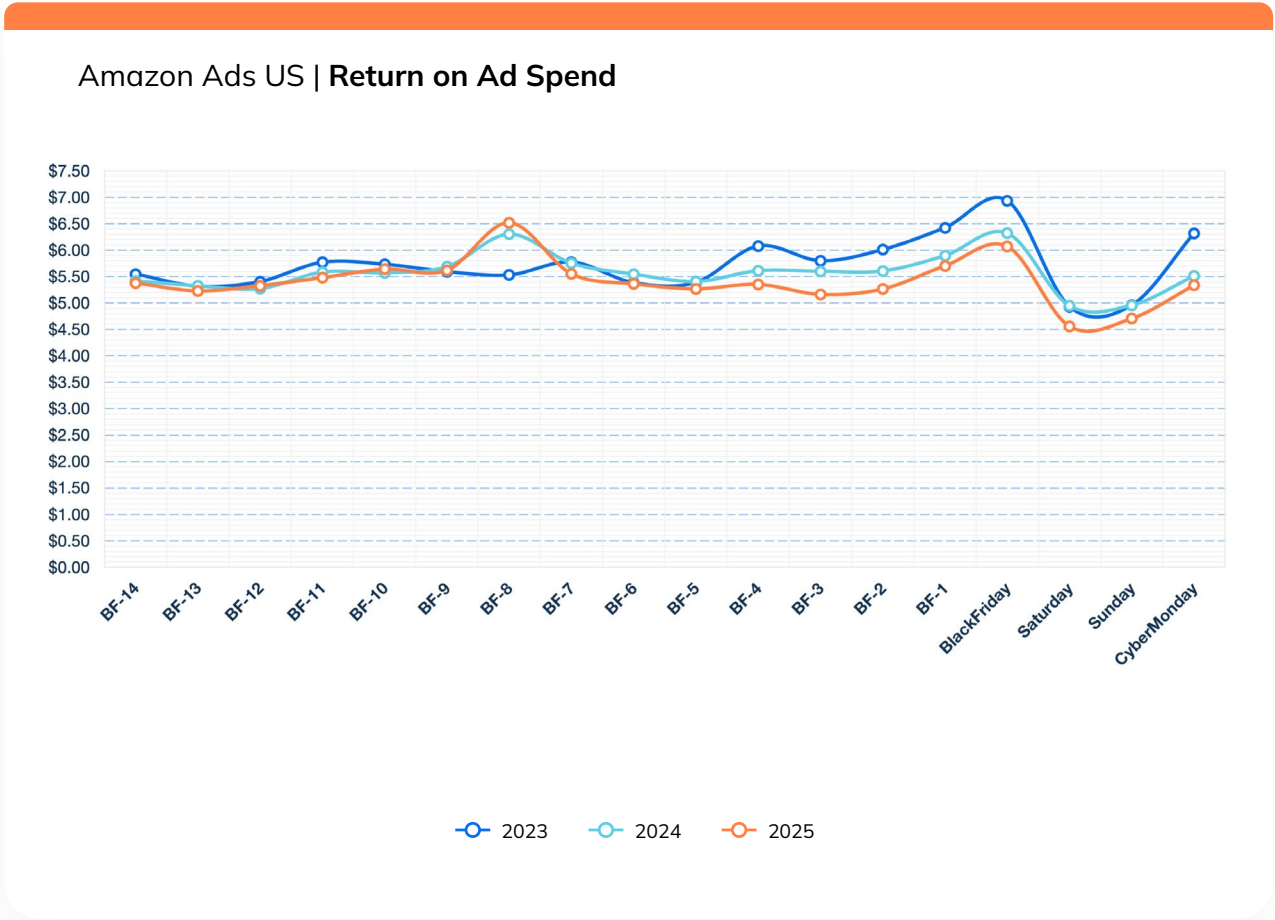
-6.7%

Average Daily Spend
(Cyber Monday YoY)

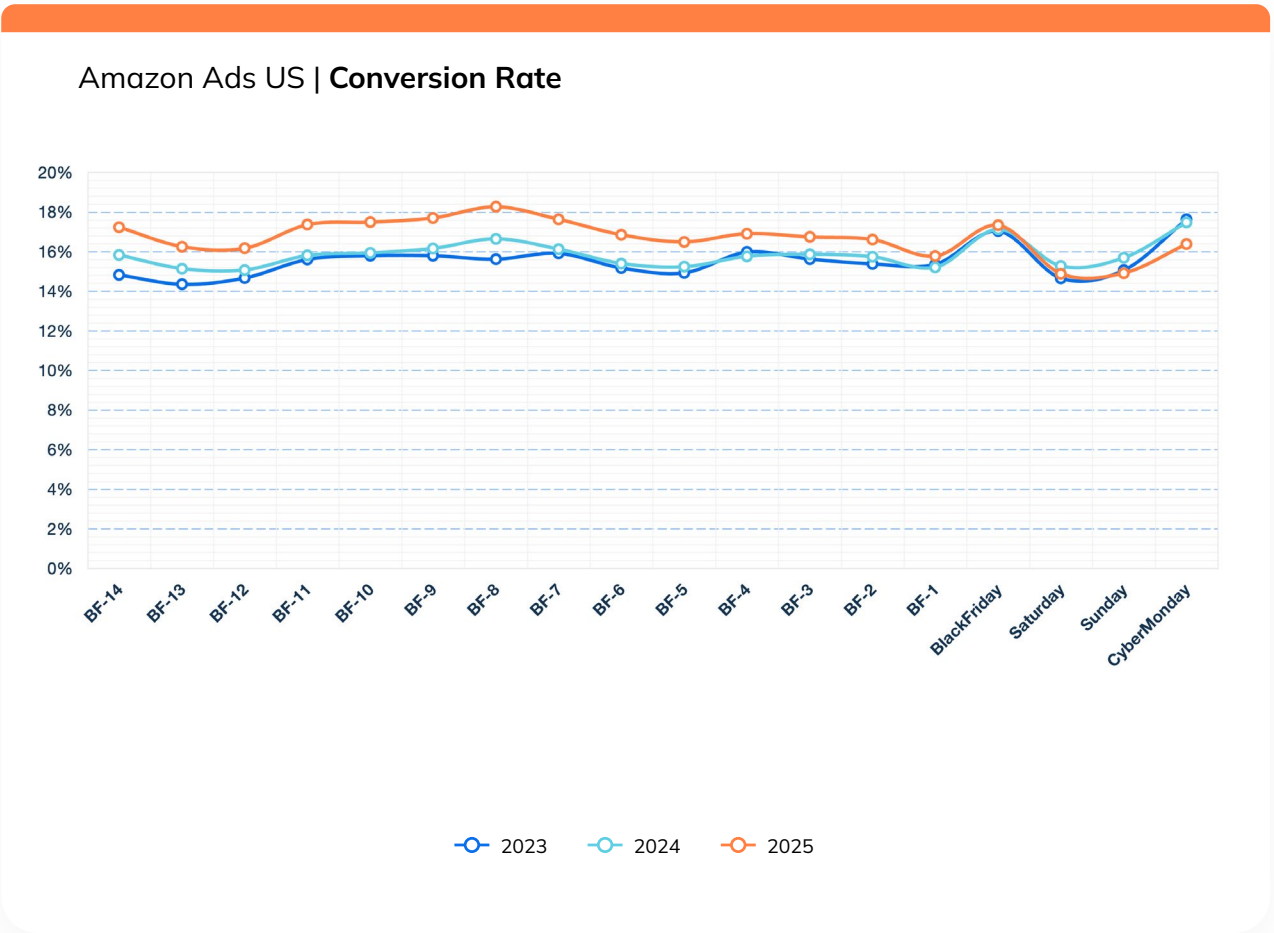
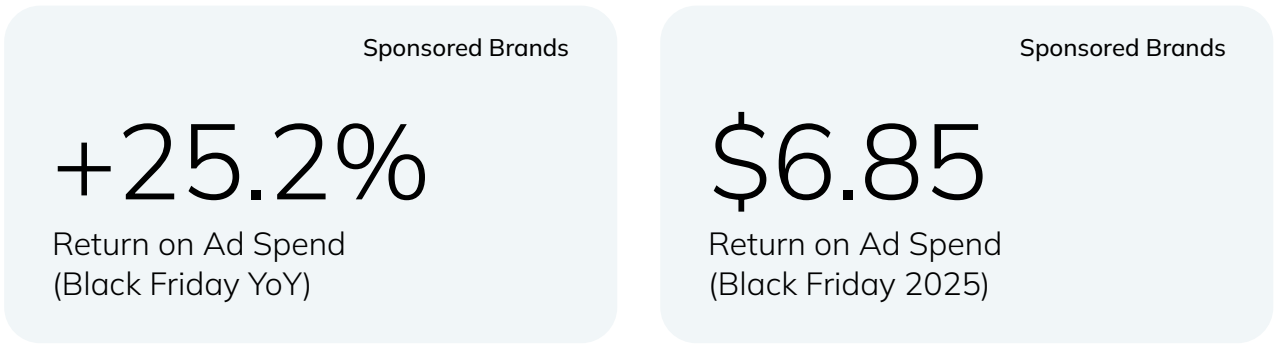
Brands increased their Sponsored Products and Sponsored Brands spend on Black Friday YoY but tightened their budgets across the broader Cyber 5 window, racing to convert holiday shoppers who increasingly take advantage of Black Friday deals rather than waiting until Cyber Monday.

ROAS and CVR Trends

Amazon Ads US | Sponsored Brands & Products

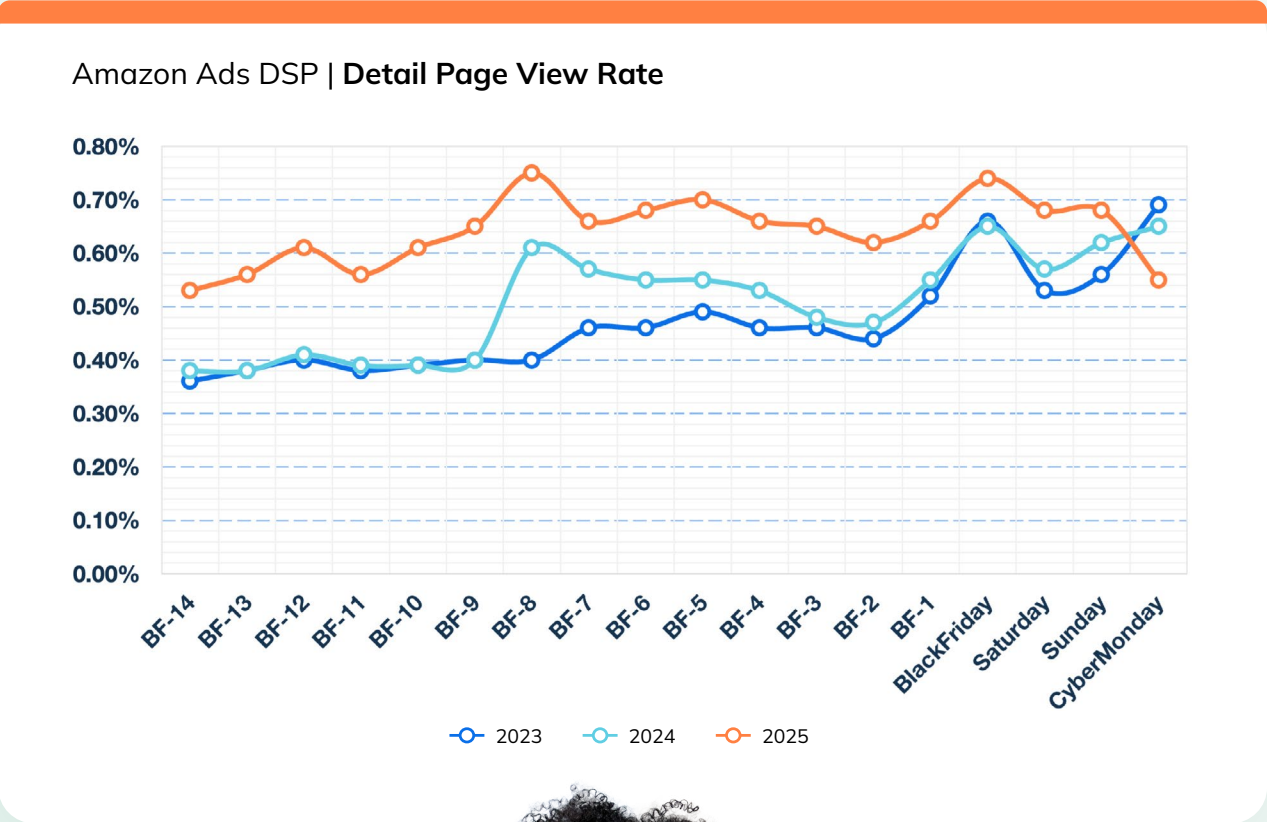


While Sponsored Products campaigns historically delivered stronger returns during Cyber 5 than their Sponsored Brands counterparts—driving 1.3x higher ROAS just last year—that trend reversed in 2025, as Sponsored Brands ROAS surged on the back of improved CVR and AOV.



DPVR & New-to-Brand Sales

Amazon Ads US DSP Benchmarks

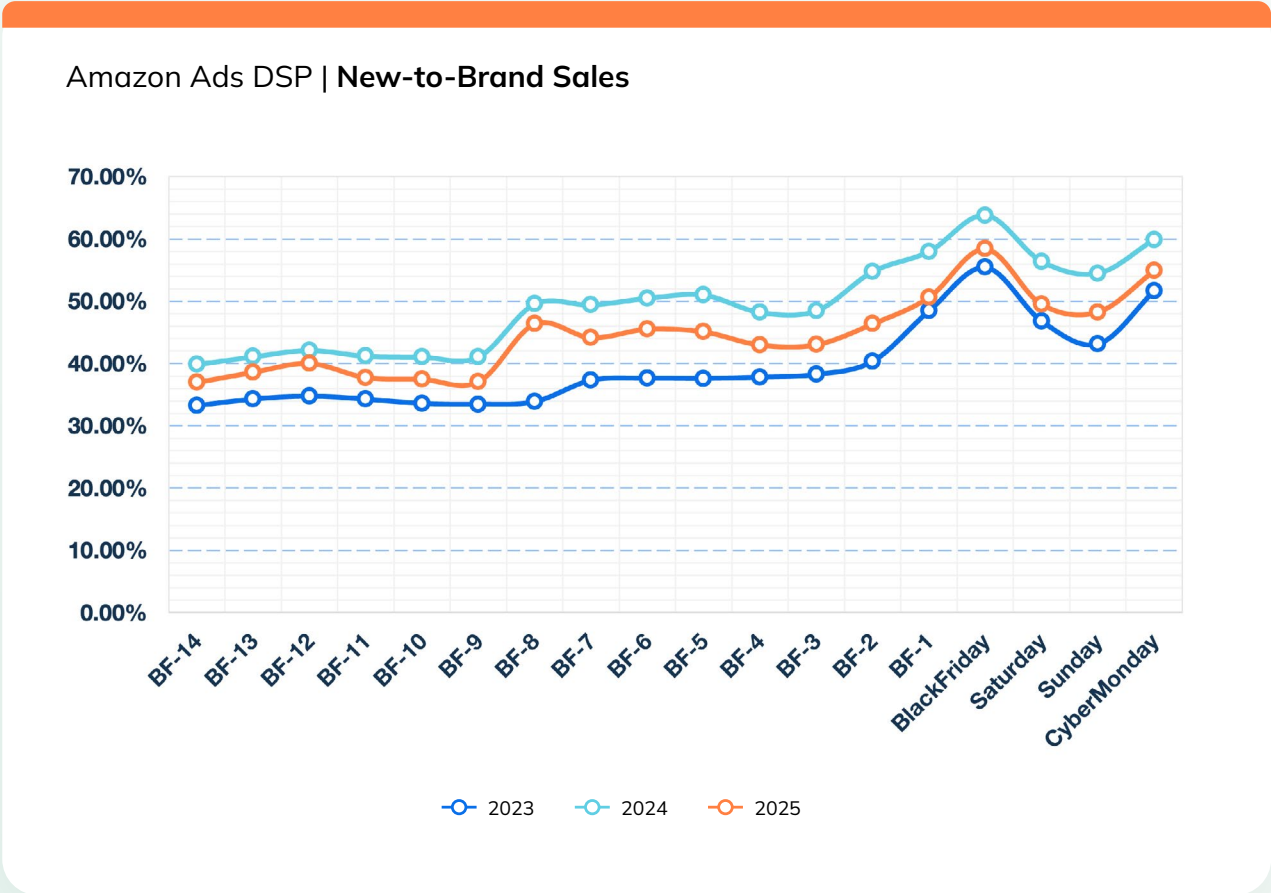


-0.8%

Detail Page View Rate
(Cyber 5 YoY)

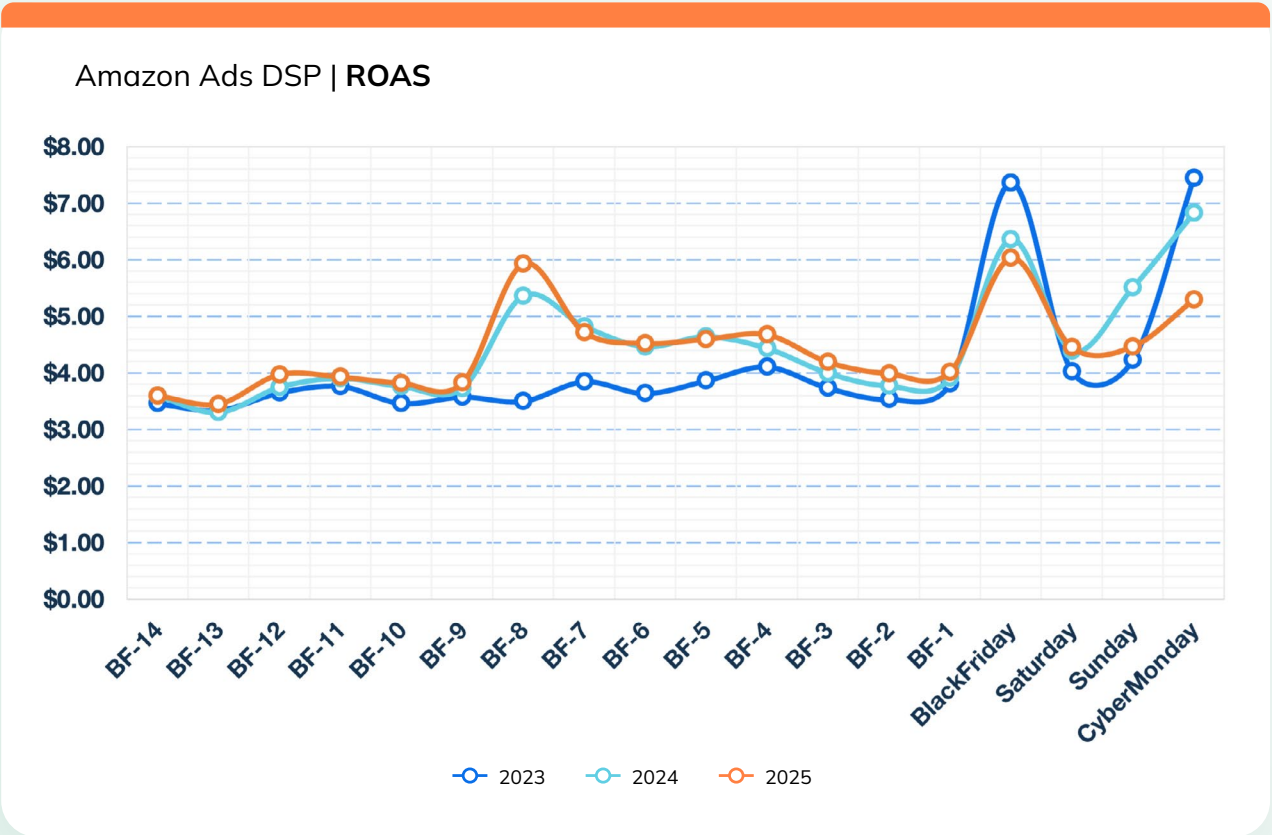
-8.4%

New-to-Brand Sales
(Cyber 5 YoY)



ROAS

Amazon Ads US DSP Benchmarks



\$6.03

Return on Ad Spend
(Black Friday 2025)

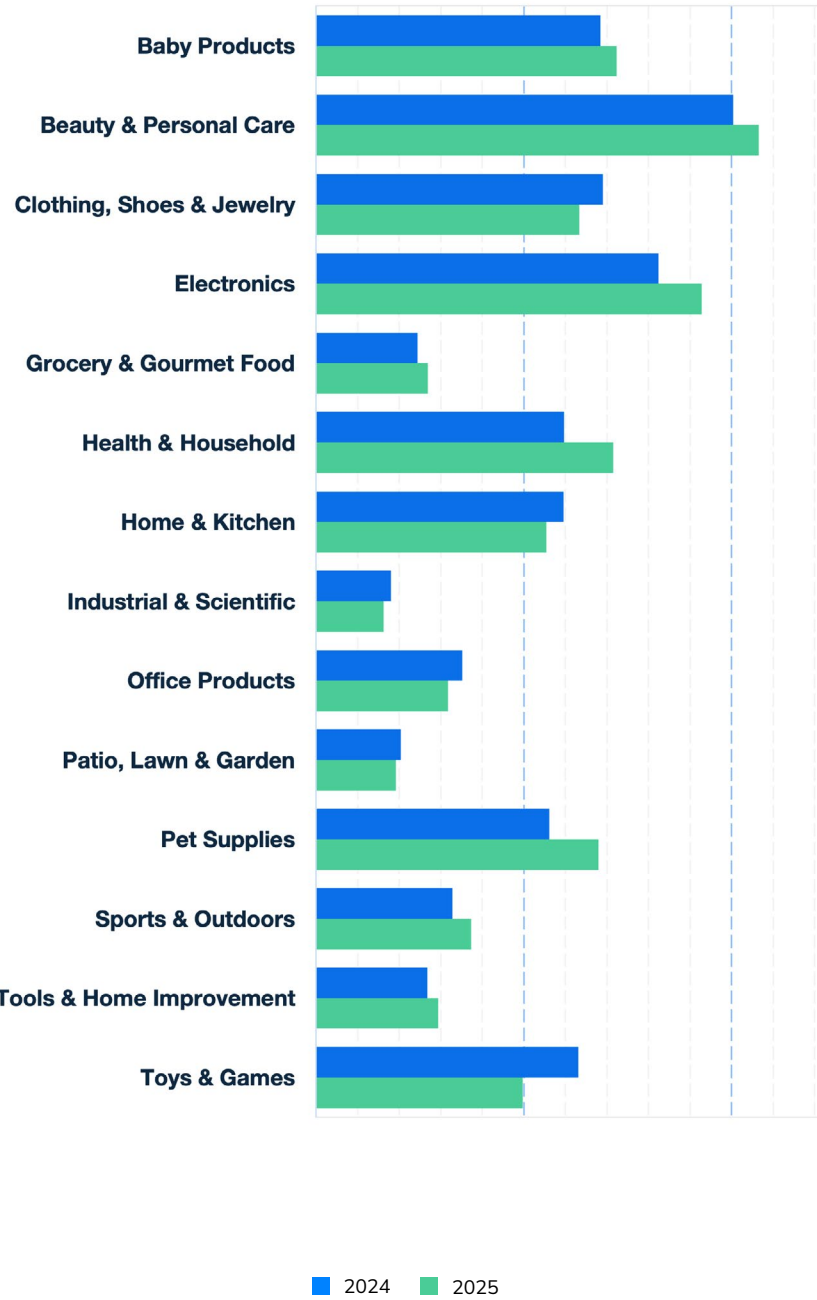
Although ROAS declined –14.1% YoY during Cyber 5 2025, Amazon DSP advertisers still received a healthy return (\$6.03) on their Black Friday campaigns, which outperformed Cyber Monday placements (\$5.29) by nearly 75 cents.



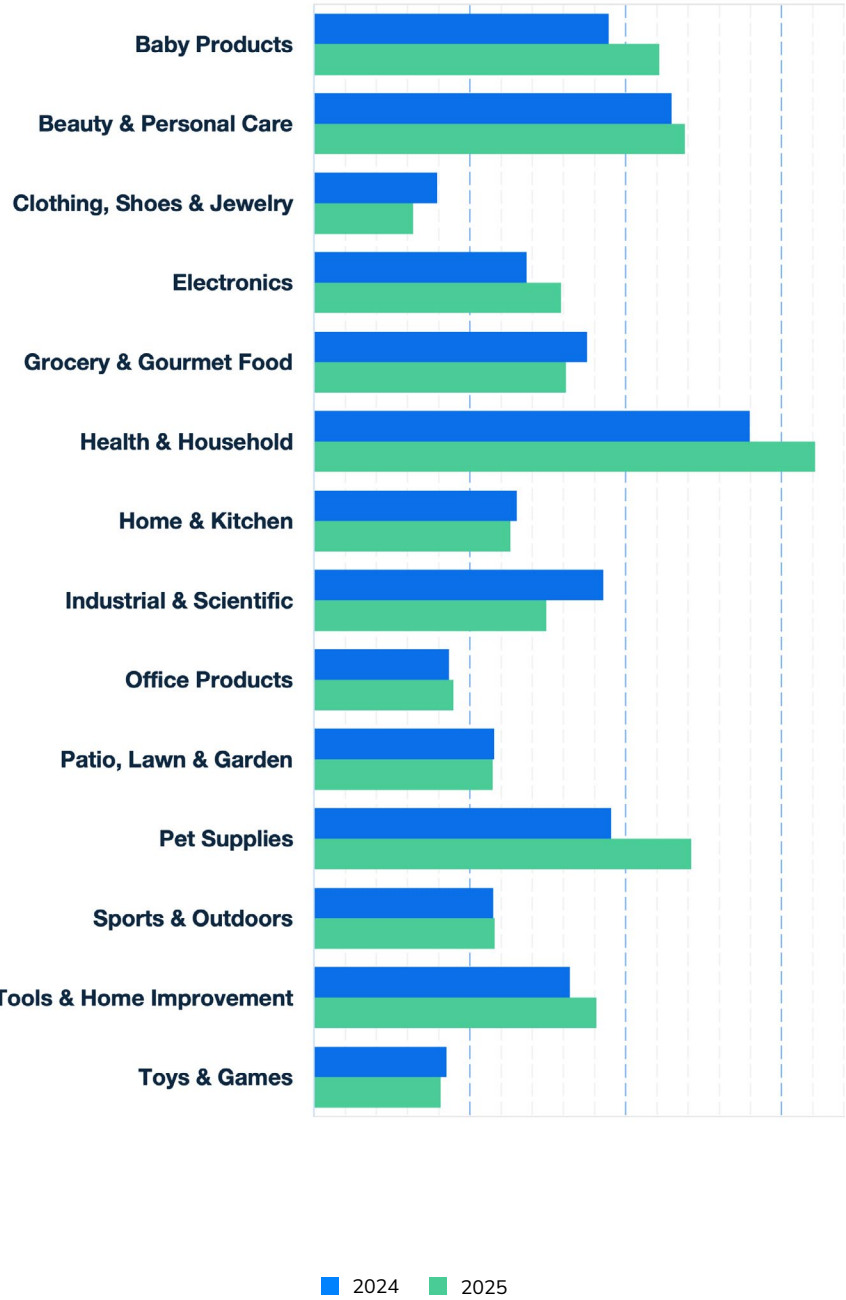
Category Benchmarks

Amazon US

Amazon US Categories | Brand Avg. Daily Spend



Amazon US Categories | Cost-Per-Click

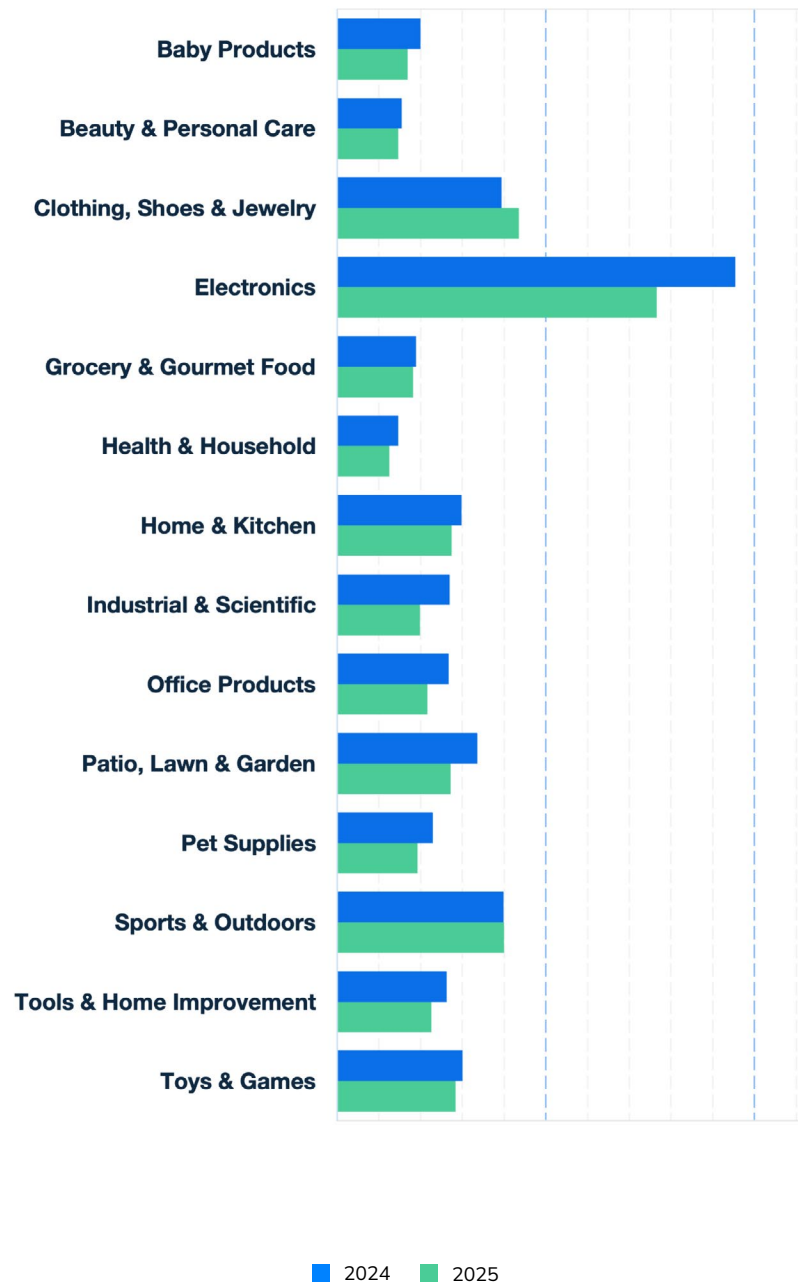


Category Trends

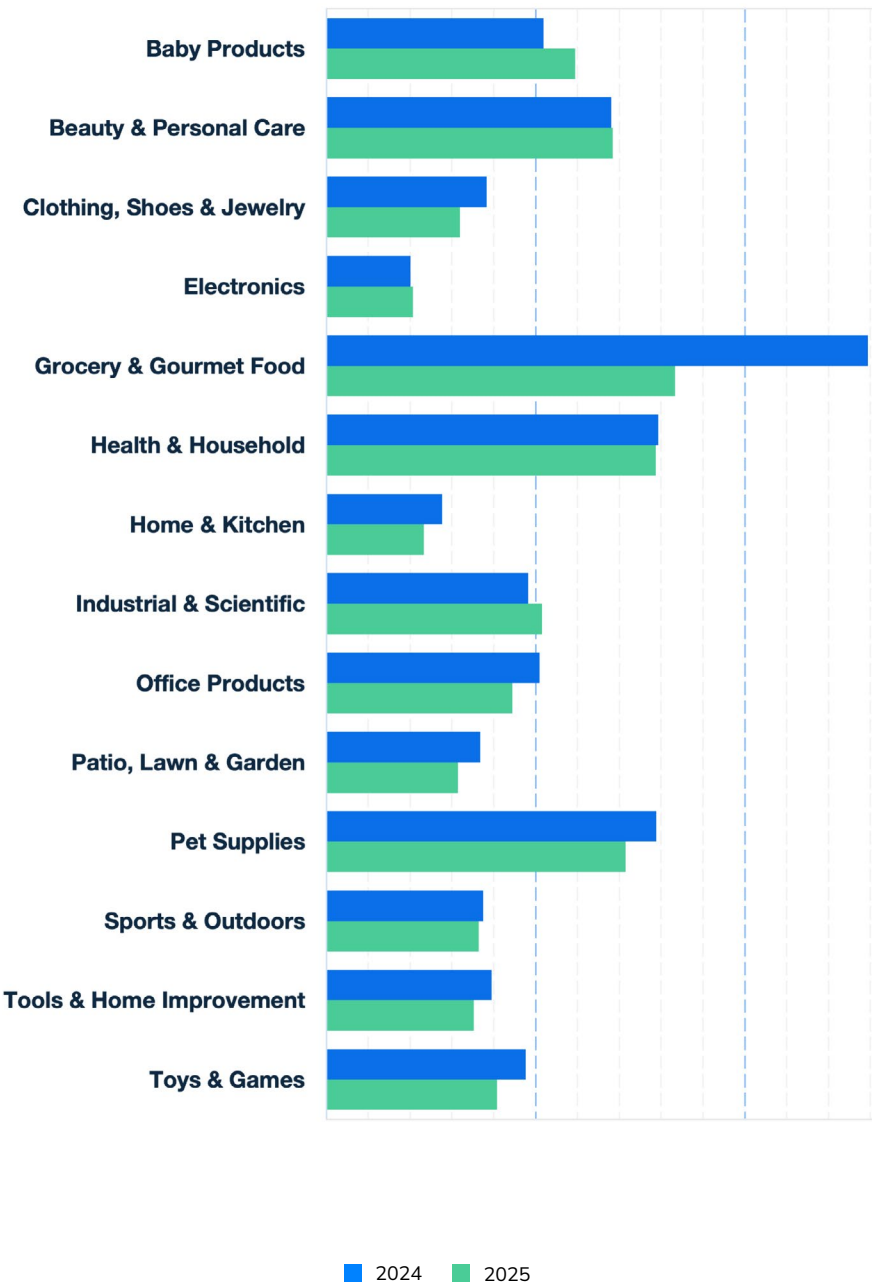
Spend & CPC



Amazon US Categories | Return on Ad Spend



Amazon US Categories | Conversion Rate



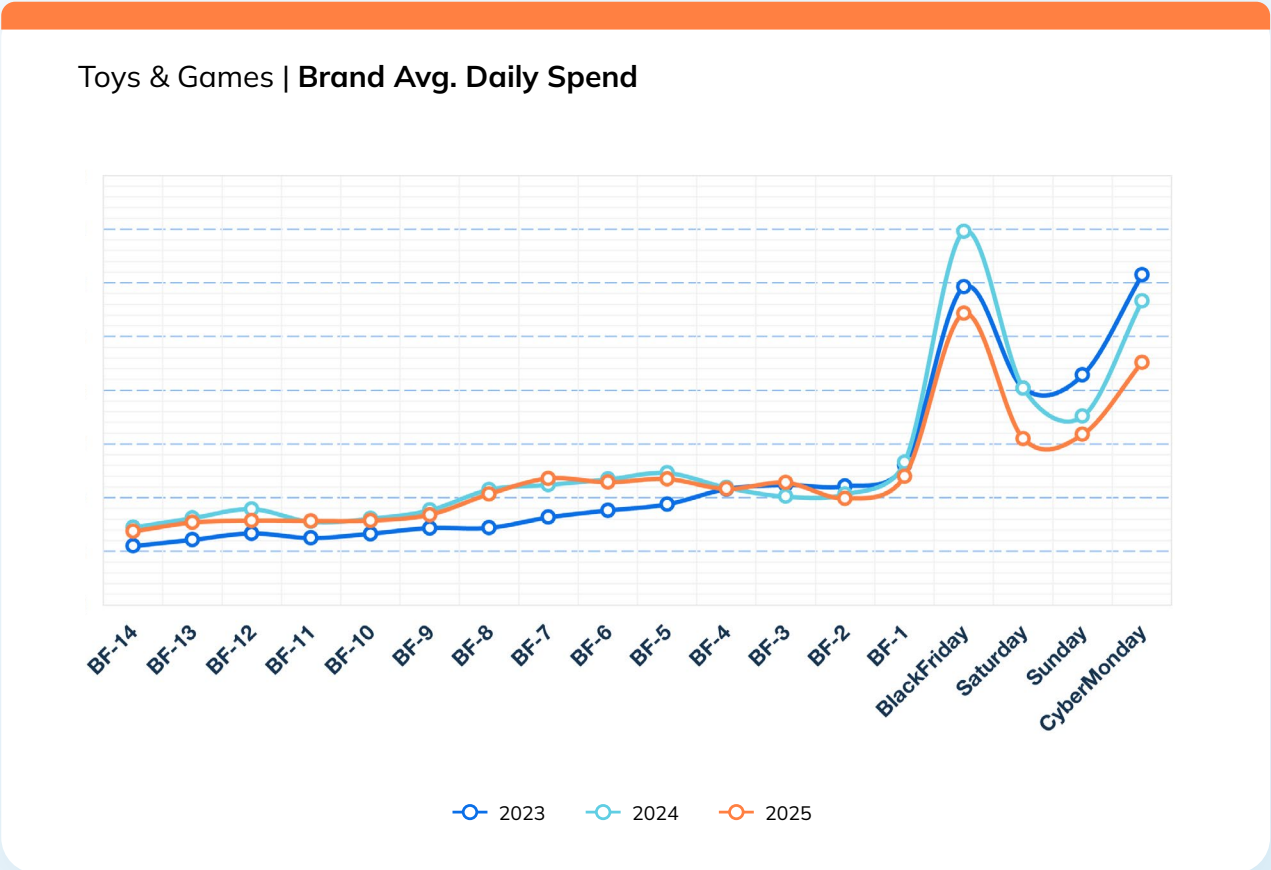
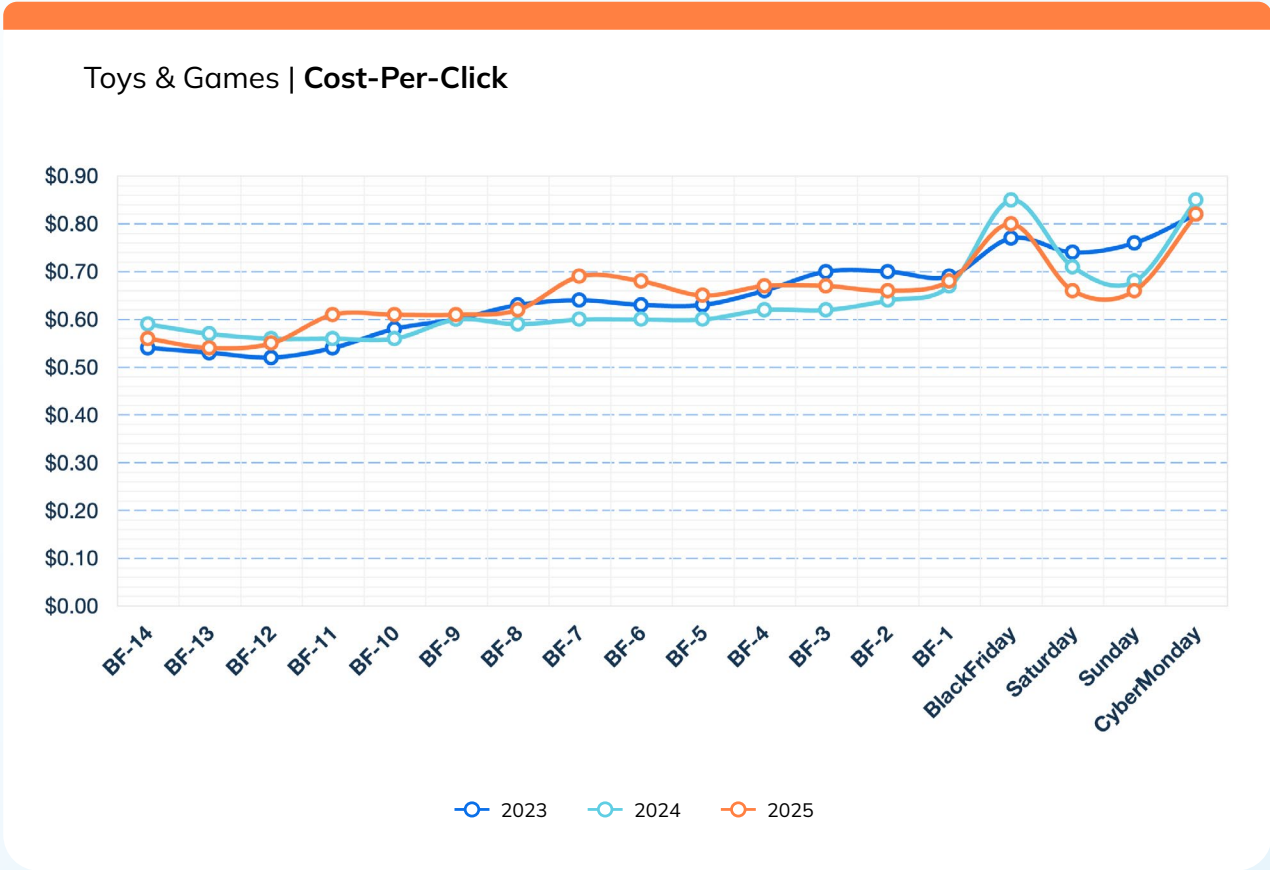
Category Trends

ROAS & CVR



CPC and Spend

Amazon US Categories ▪ Toys & Games



-21.21%

Average Daily Spend
(Black Friday & Cyber Monday YoY)

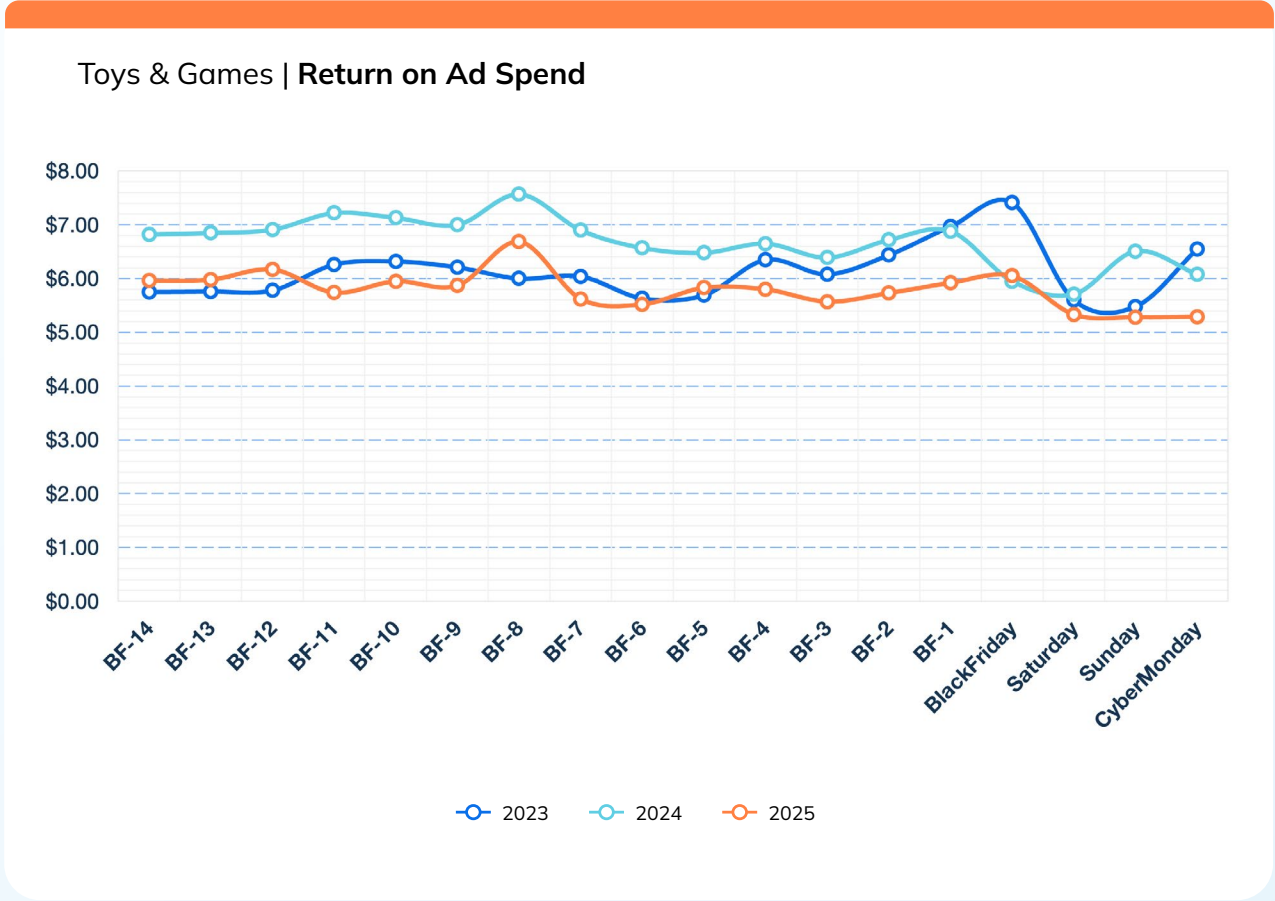
\$0.81

Cost-Per-Click
(Black Friday & Cyber Monday 2025)

Despite Cyber 5's proximity to major December holidays, consumers prioritized essentials this year over present shopping. Unsurprisingly, brands shifted their spend away from more discretionary categories like Toys & Games, which reduced auction pressure in turn, making Toys & Games the second-cheapest Amazon category for advertisers during Black Friday and Cyber Monday 2025.

ROAS and CVR

Amazon US Categories ▪ Toys & Games

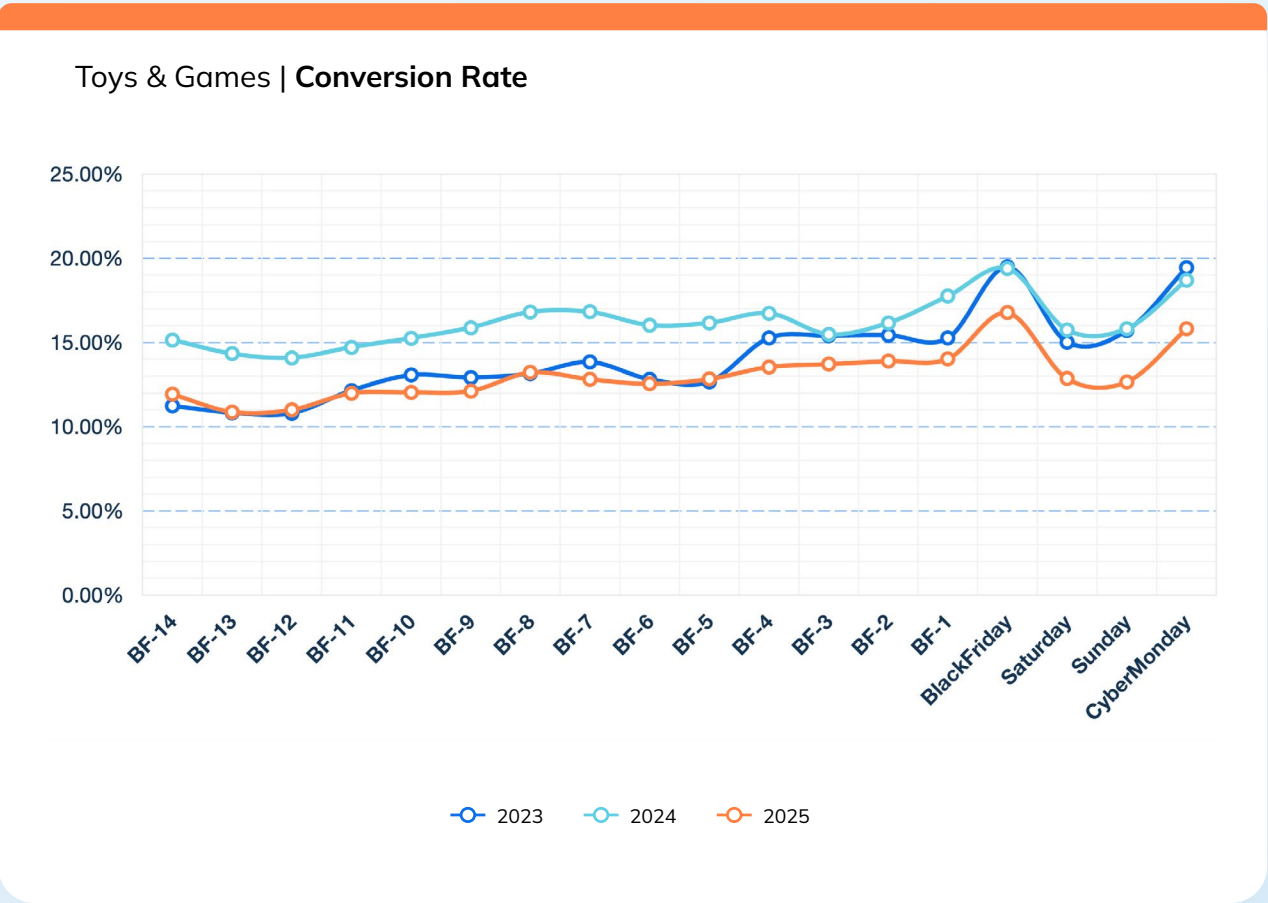


\$6.05

Return on Ad Spend
(Black Friday 2025)

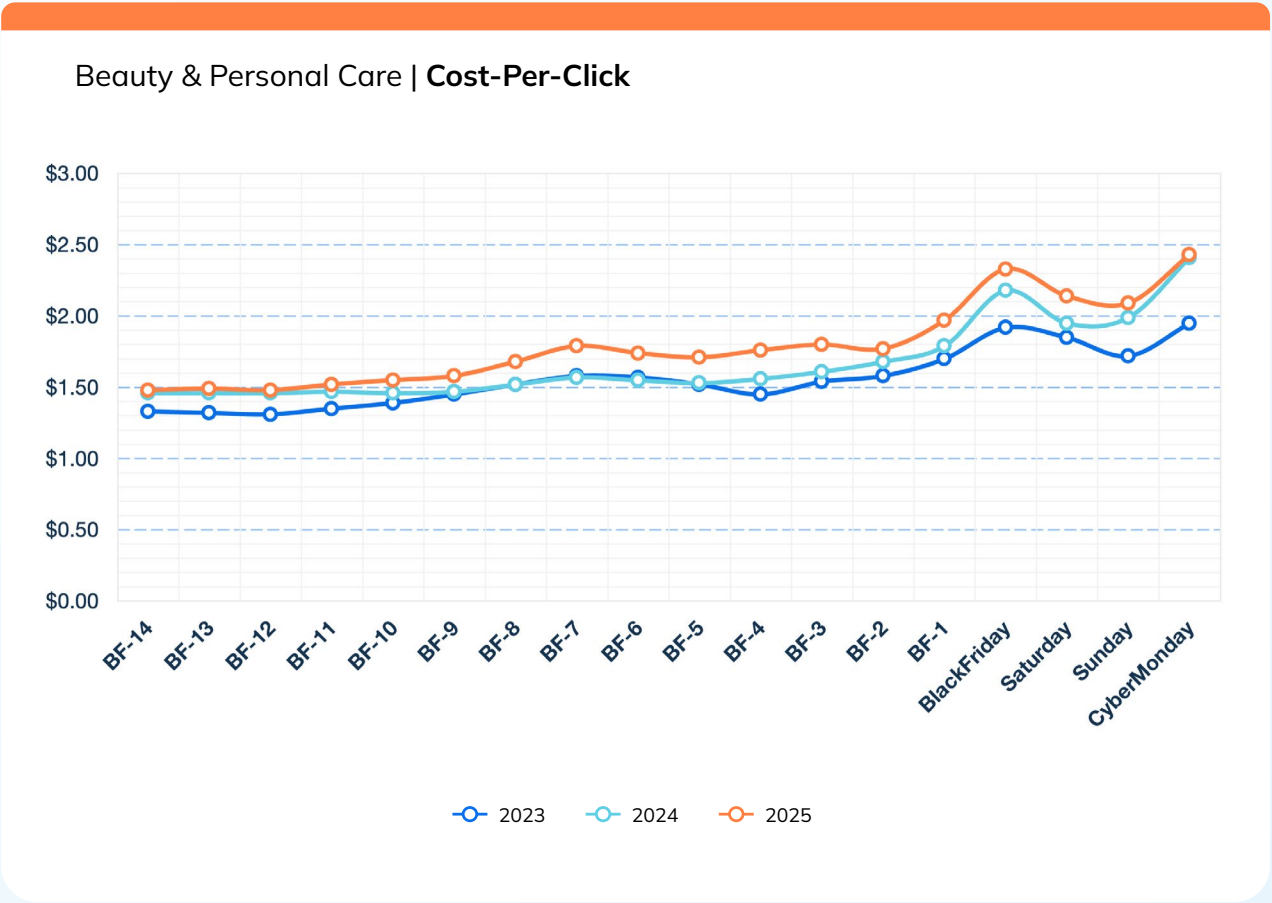
\$5.29

Return on Ad Spend
(Cyber Monday 2025)



Amazon US Categories • Beauty & Personal Care

CPC and Spend

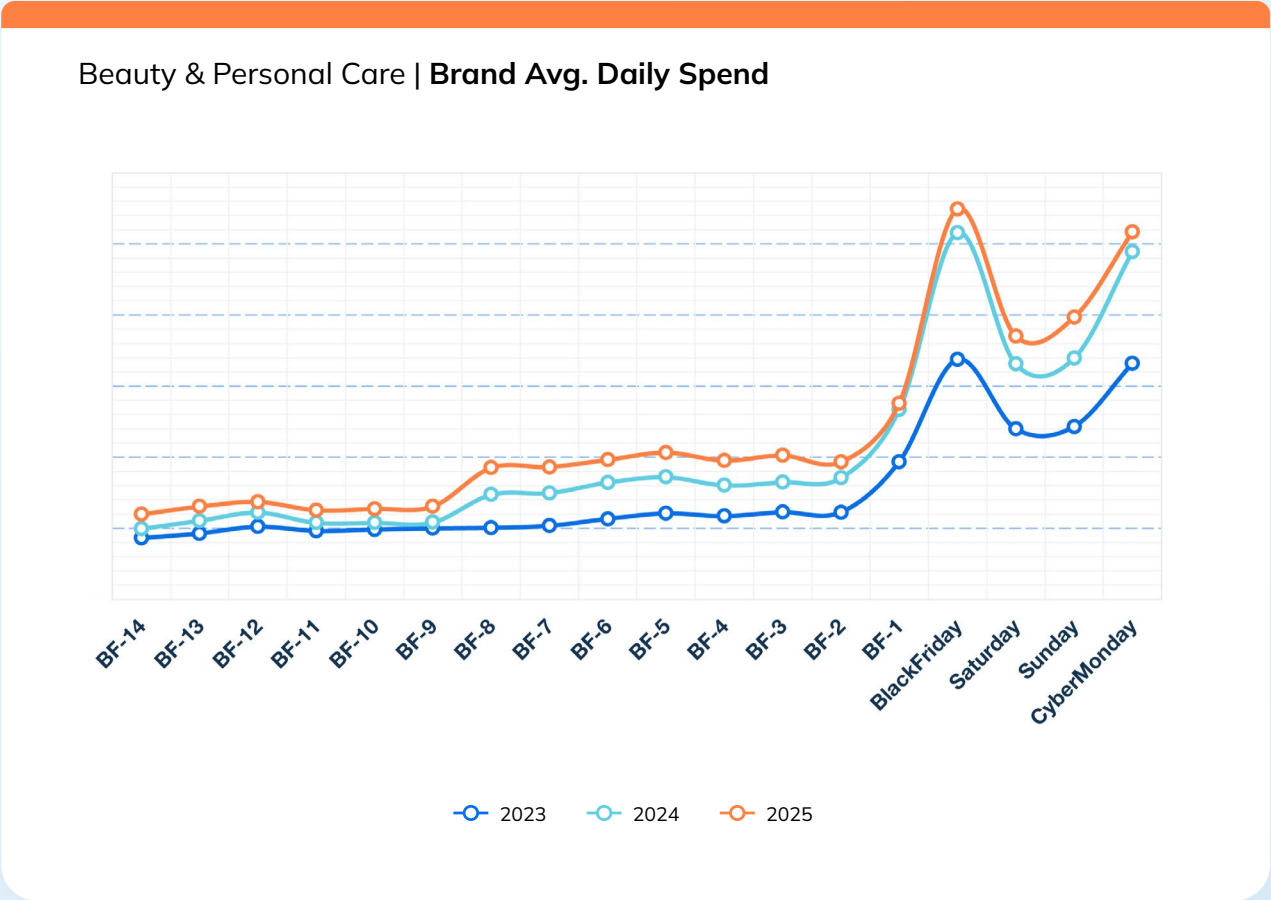


+6.08%

Average Daily Spend
(Black Friday & Cyber Monday YoY)

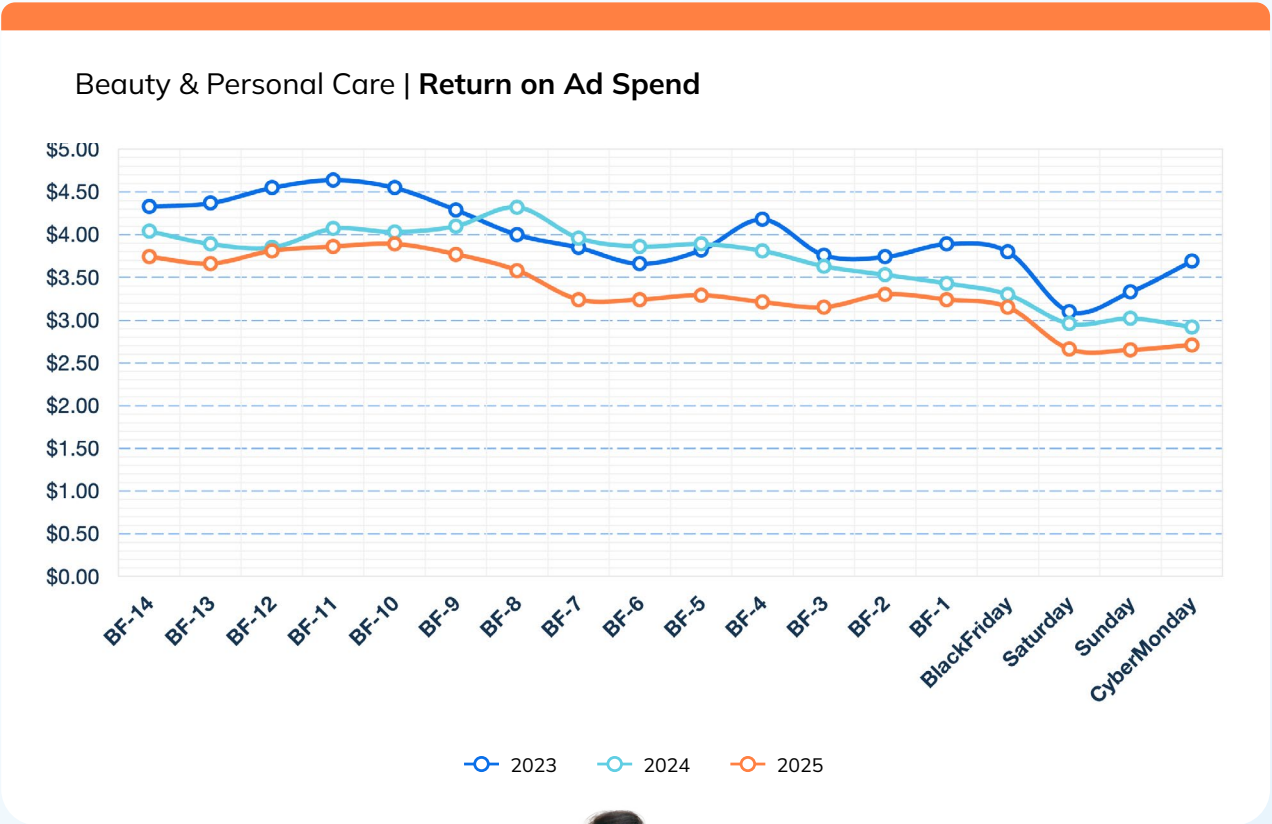
\$2.33

Cost-Per-Click
(Black Friday 2025)



ROAS and CVR

Amazon US Categories ▪ Beauty & Personal Care

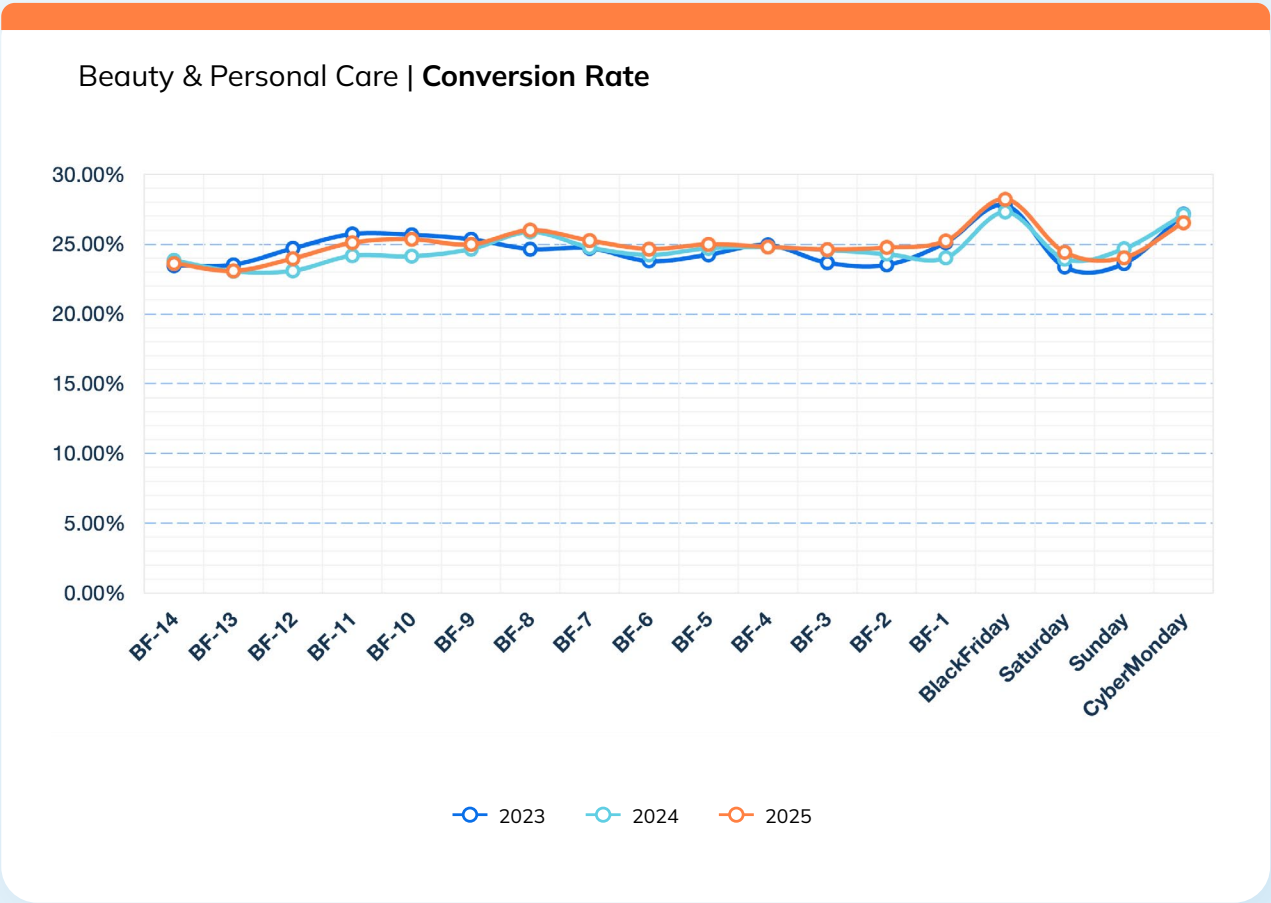
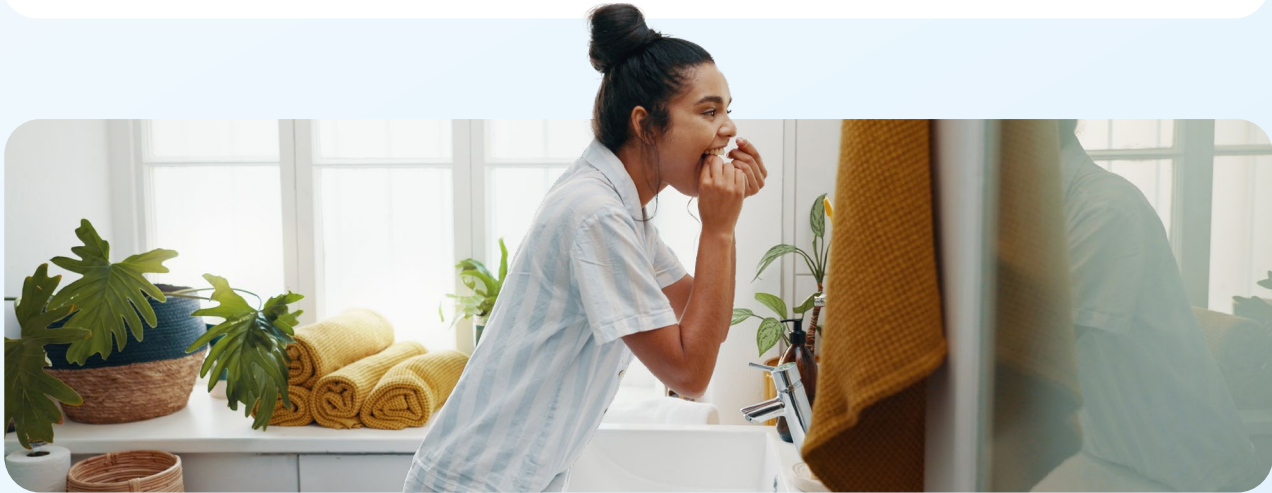


\$3.15

Return on Ad Spend
(Black Friday 2025)

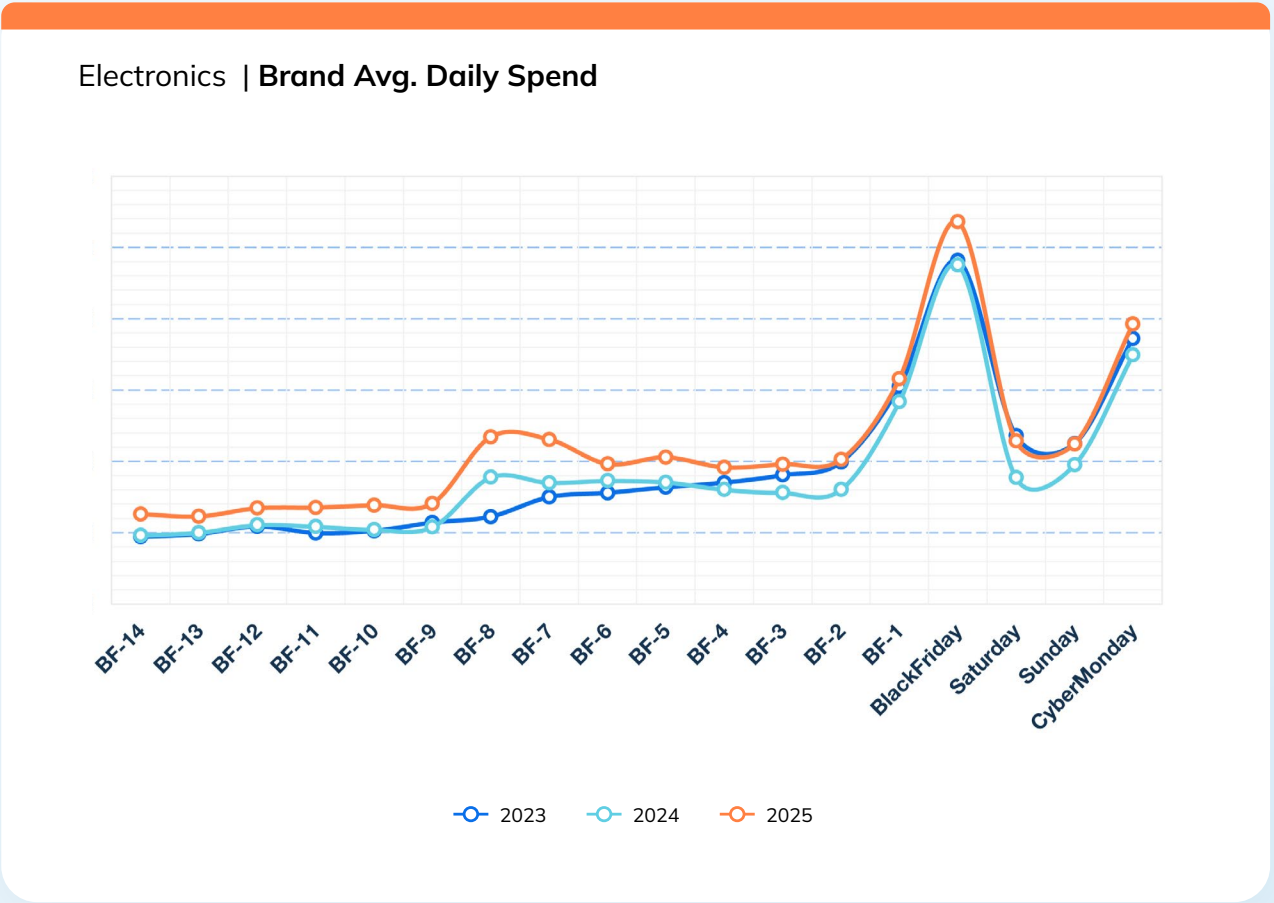
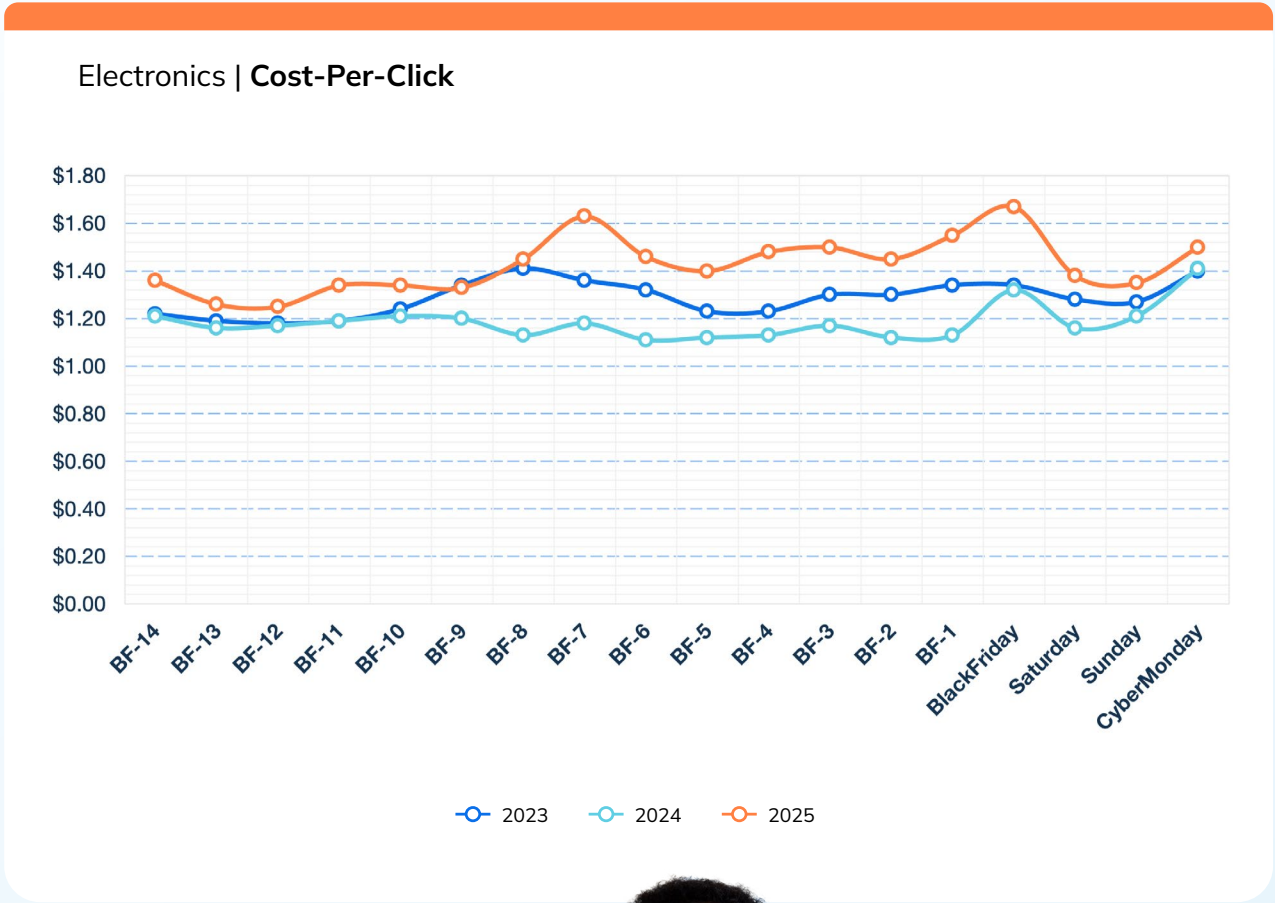
28.23%

Conversion Rate
(Black Friday 2025)



CPC and Spend

Amazon US Categories ▪ Electronics



\$1.67

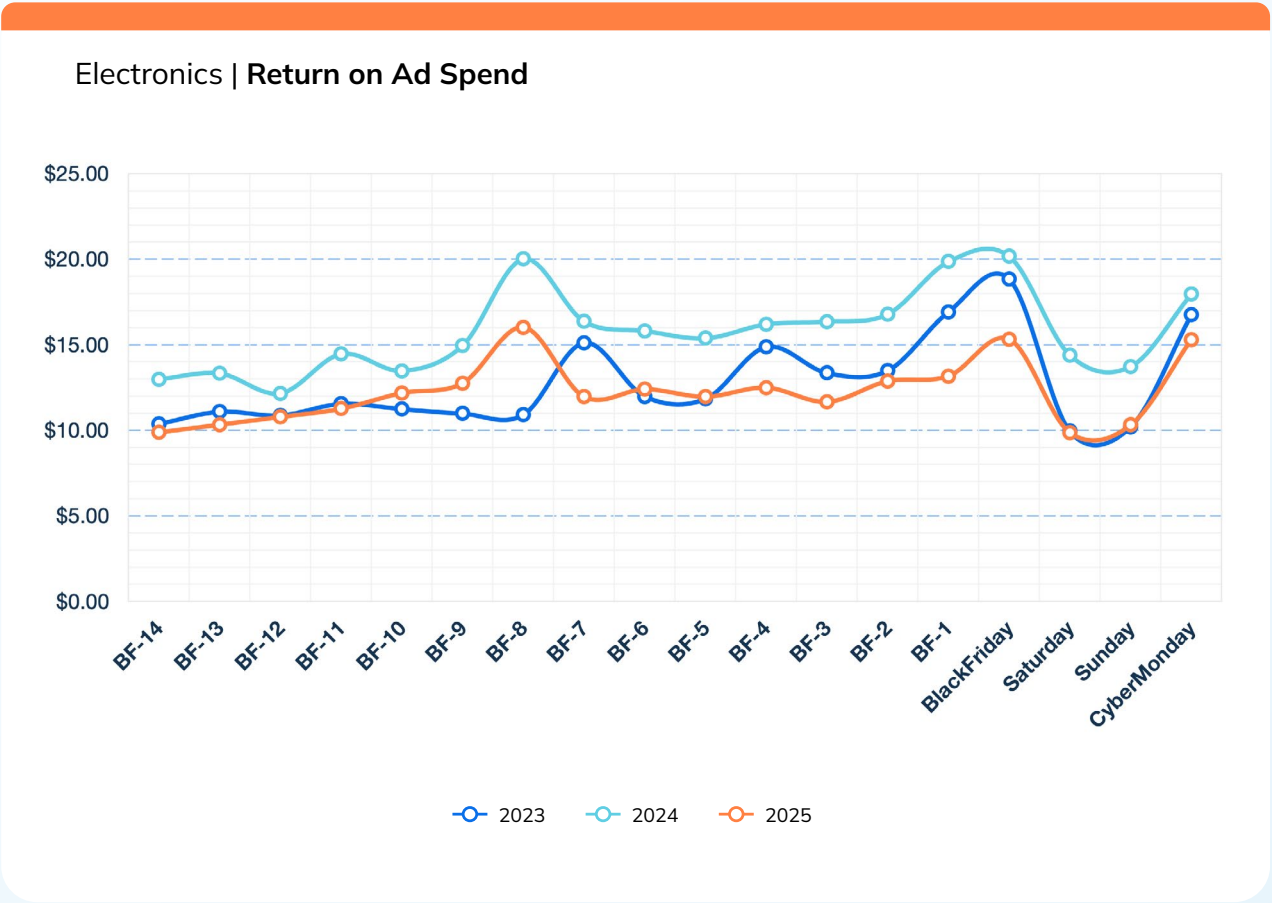
Cost-Per-Click
(Black Friday 2025)

+12.58%

Average Daily Spend
(Black Friday & Cyber Monday YoY)

ROAS and CVR

Amazon US Categories ▪ Electronics

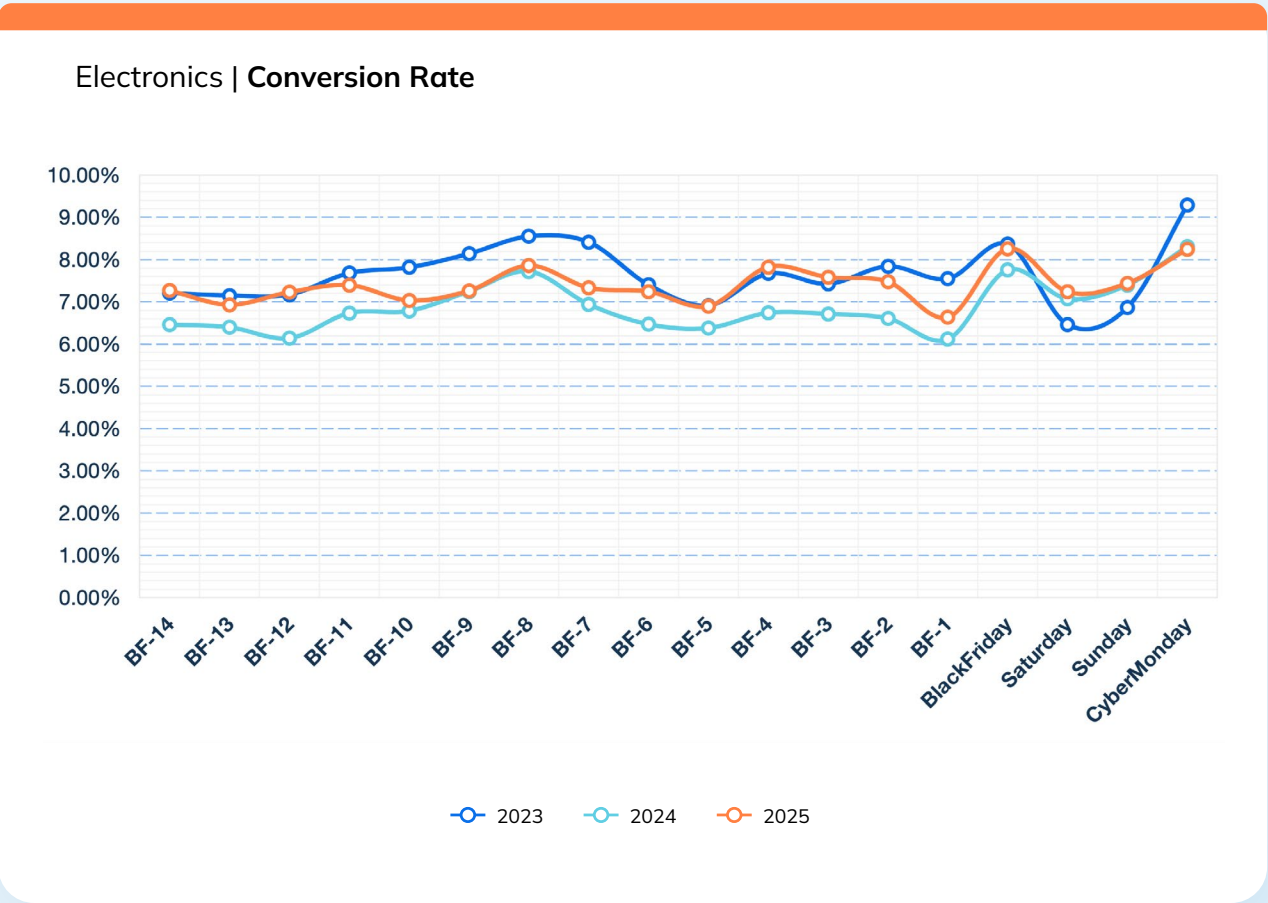


-19.72%

Return on Ad Spend
(Black Friday & Cyber Monday YoY)

\$15.32

Return on Ad Spend
(Black Friday 2025)

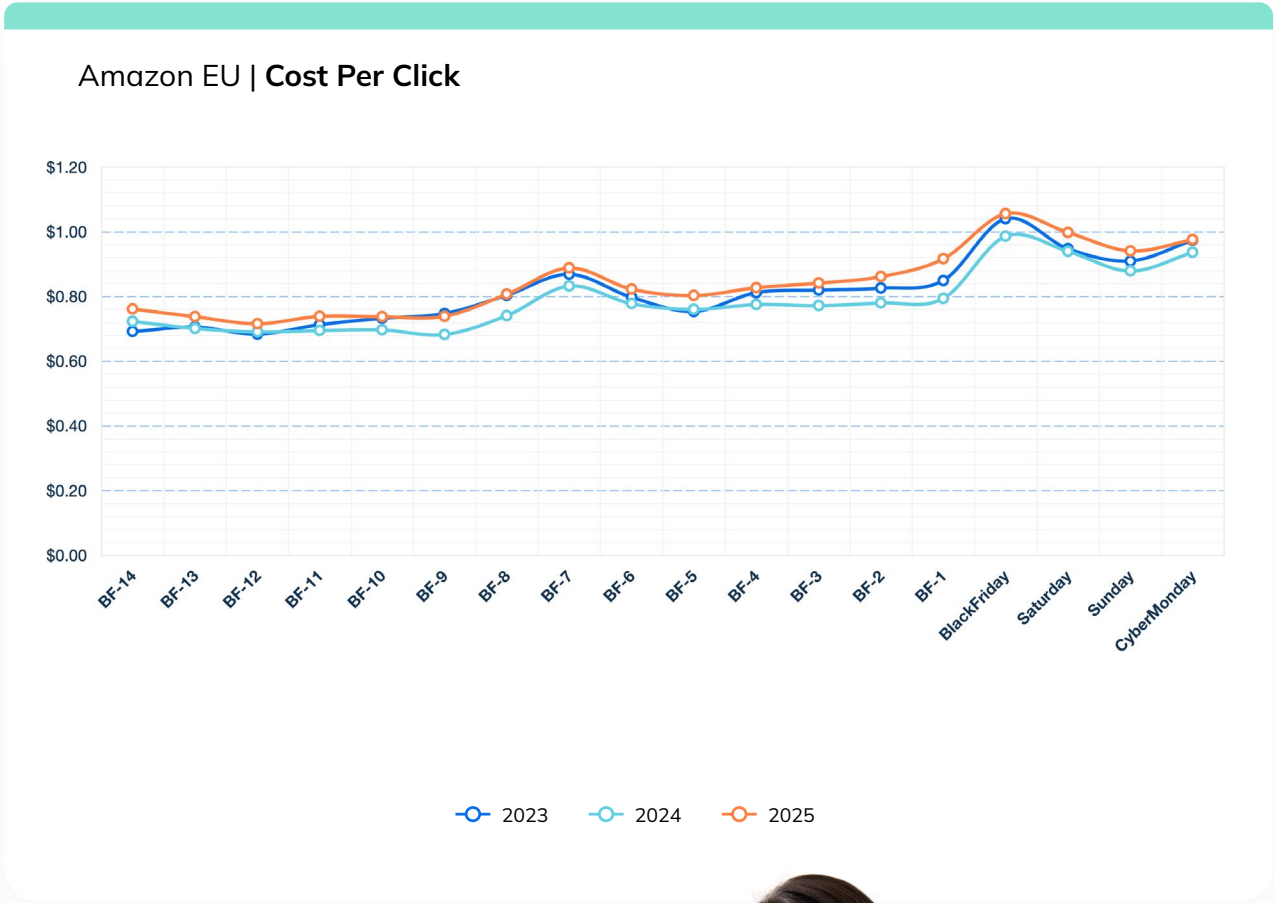


Amazon Ads EU

Sponsored Brands, Sponsored Products

CPC and Spend

Amazon Ads EU Benchmarks



Sponsored Products

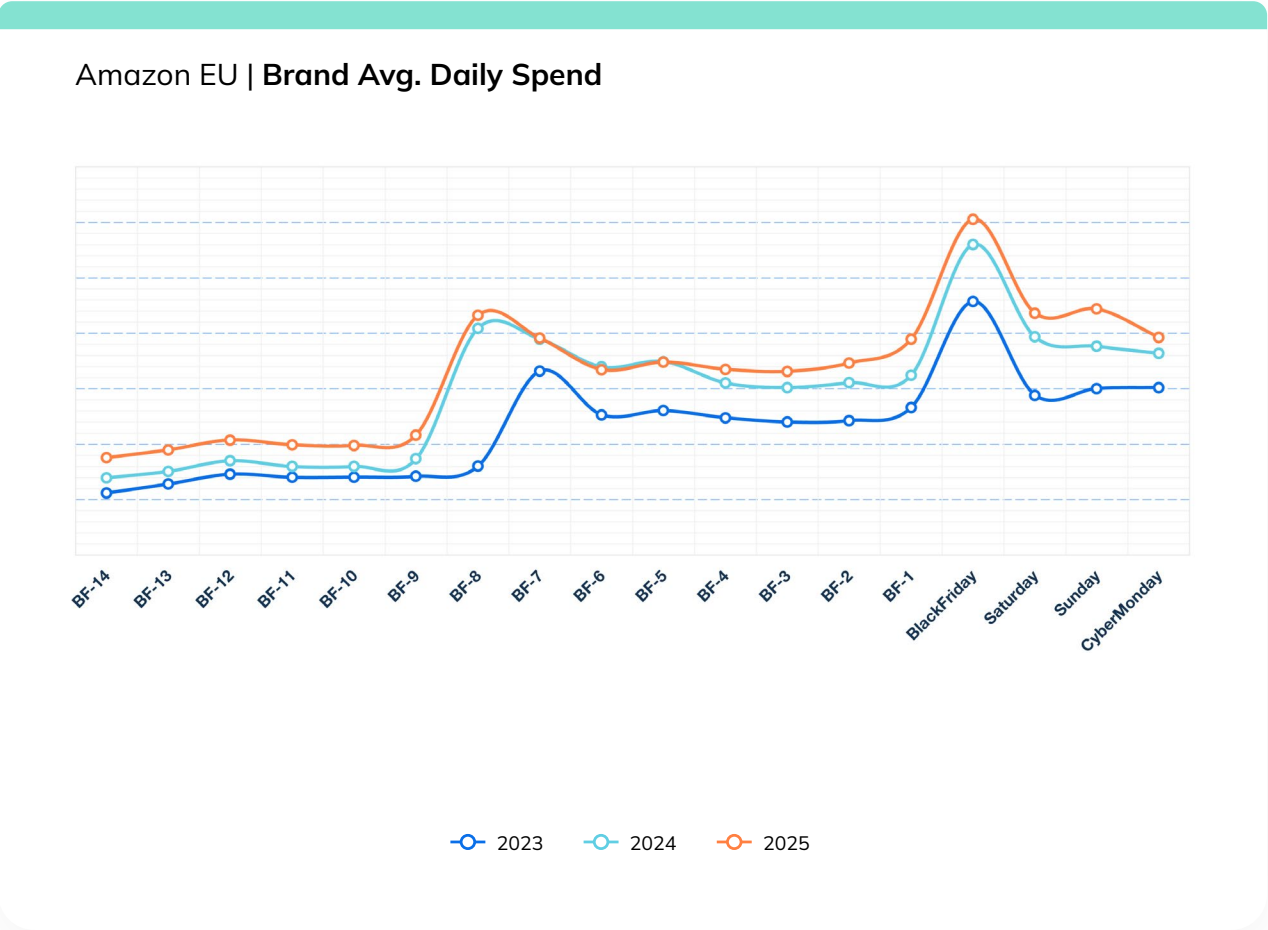
+7.5%

Cost-Per-Click
(Black Friday YoY)

Sponsored Brands

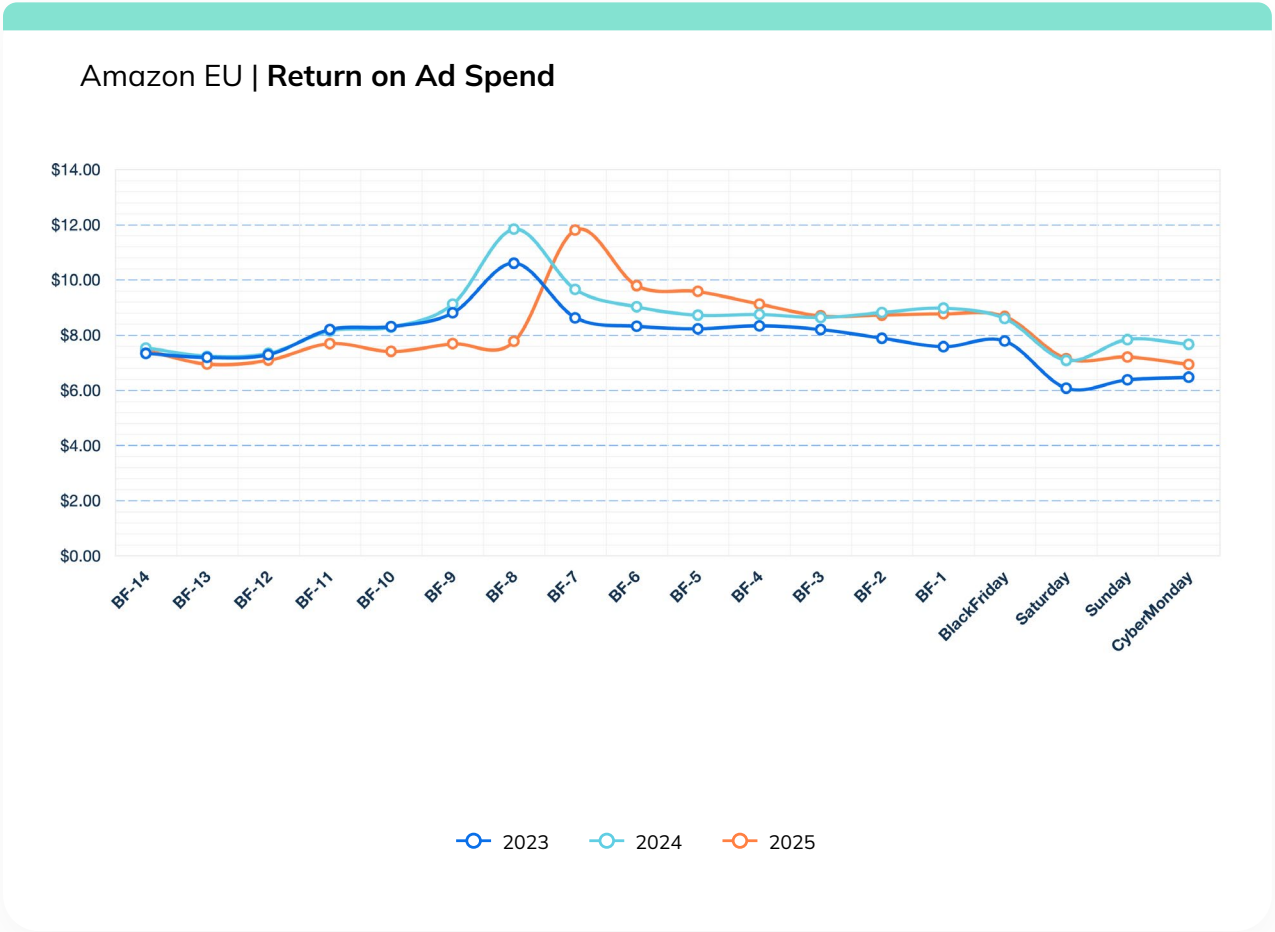
+10.3%

Cost-per-Click
(Cyber Monday YoY)



ROAS and CVR

Amazon EU Benchmarks



Mirroring US trends, EU brands saw stronger ROAS on Black Friday than Cyber Monday from both Sponsored Products and Sponsored Brands campaigns, indicating that shoppers in the EU are completing their holiday shopping early, rather than waiting for Cyber Monday deals that are increasingly less attractive than or distinct from Black Friday sales.

Sponsored Products

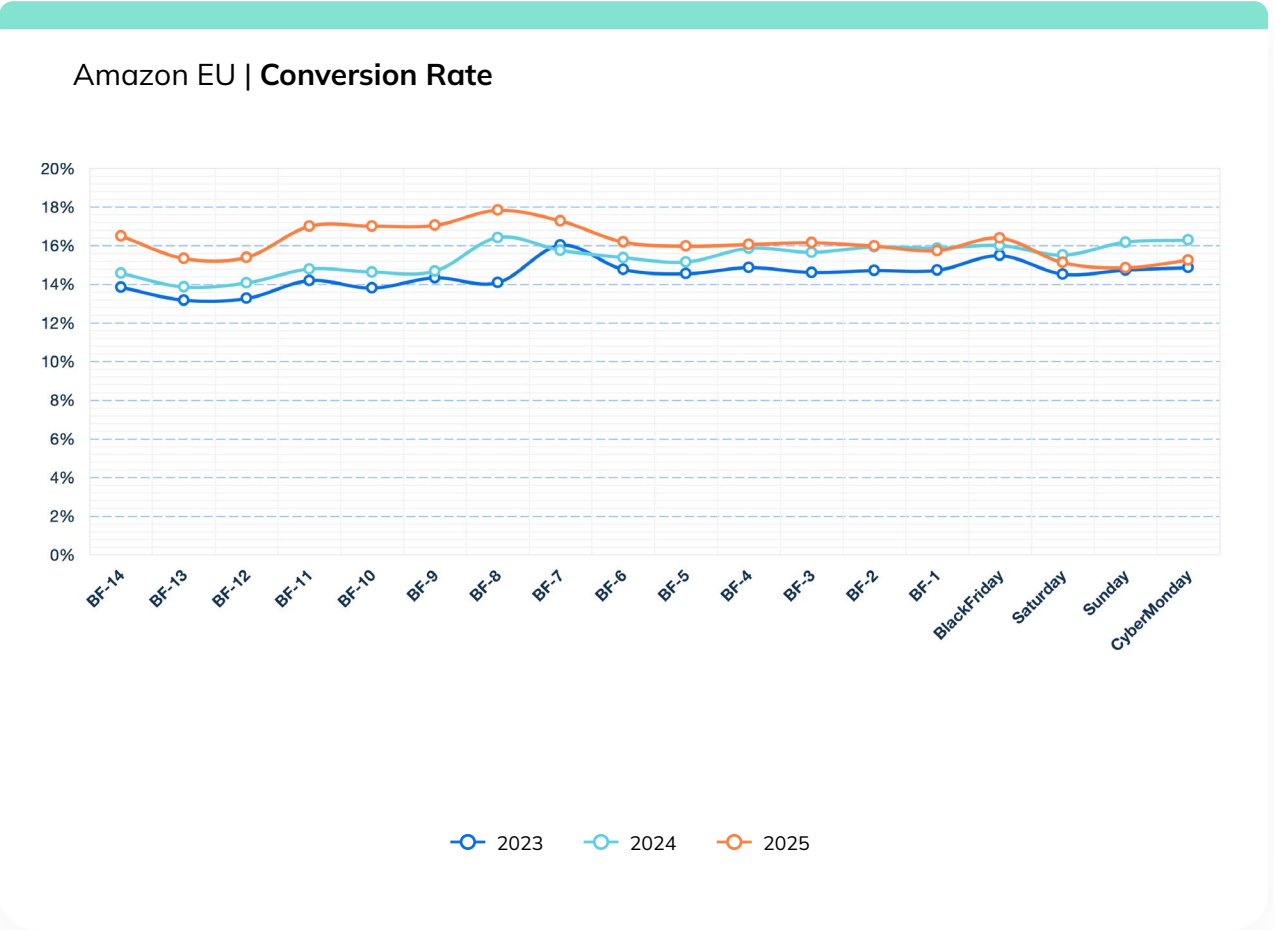
\$8.06

Return on Ad Spend
(Black Friday 2025)

Sponsored Products

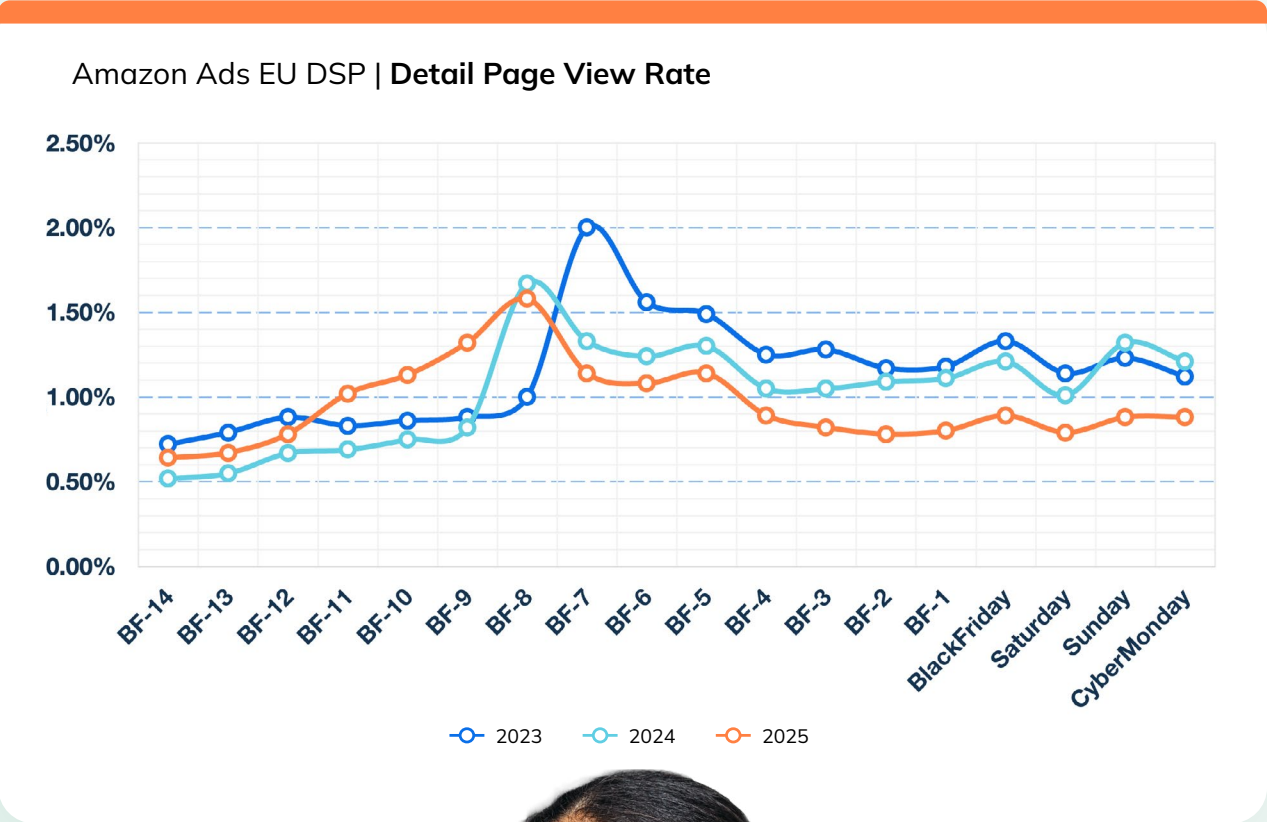
\$6.75

Return on Ad Spend
(Cyber Monday 2025)



DPVR & New-to-Brand Sales

Amazon Ads EU DSP Benchmarks

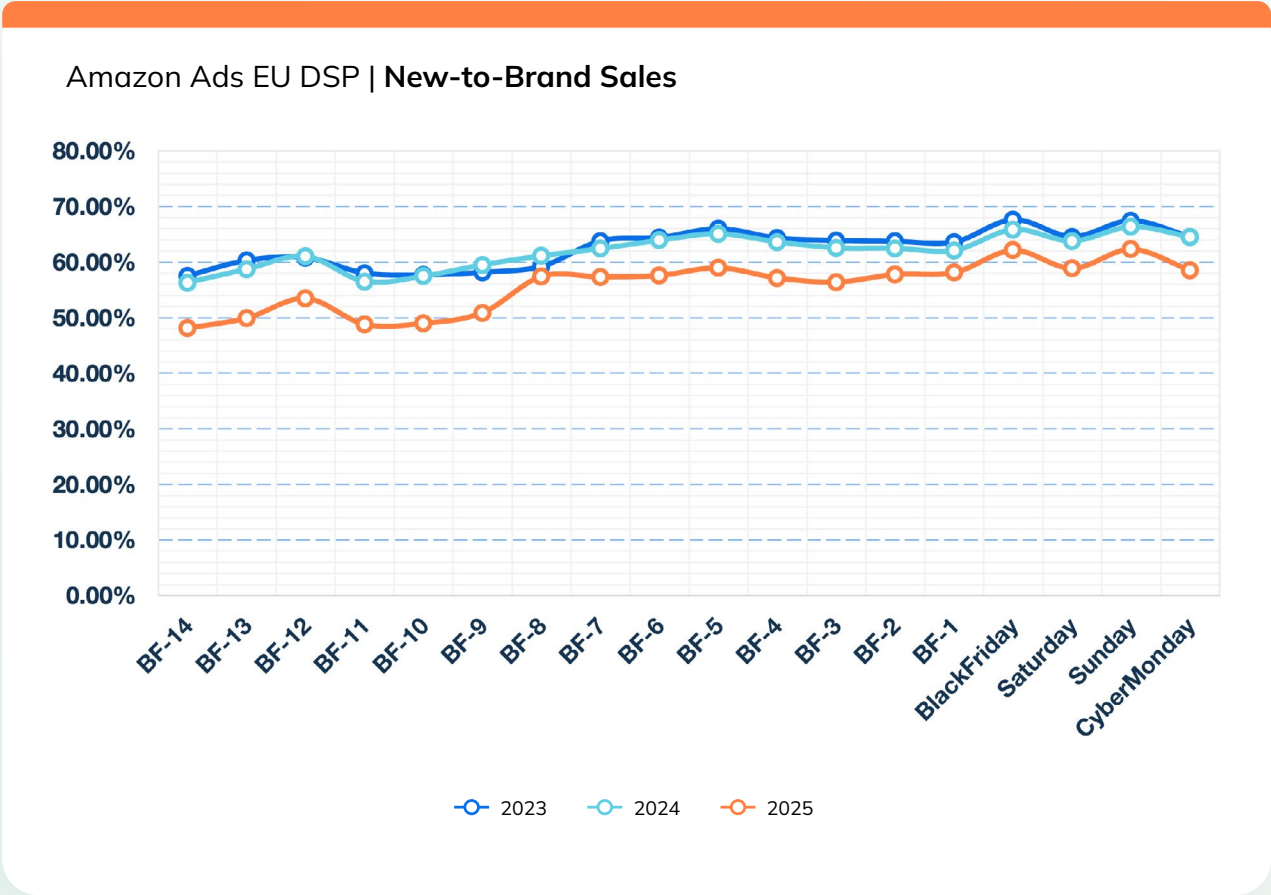


62.13%

New-to-Brand Sales
(Black Friday 2025)

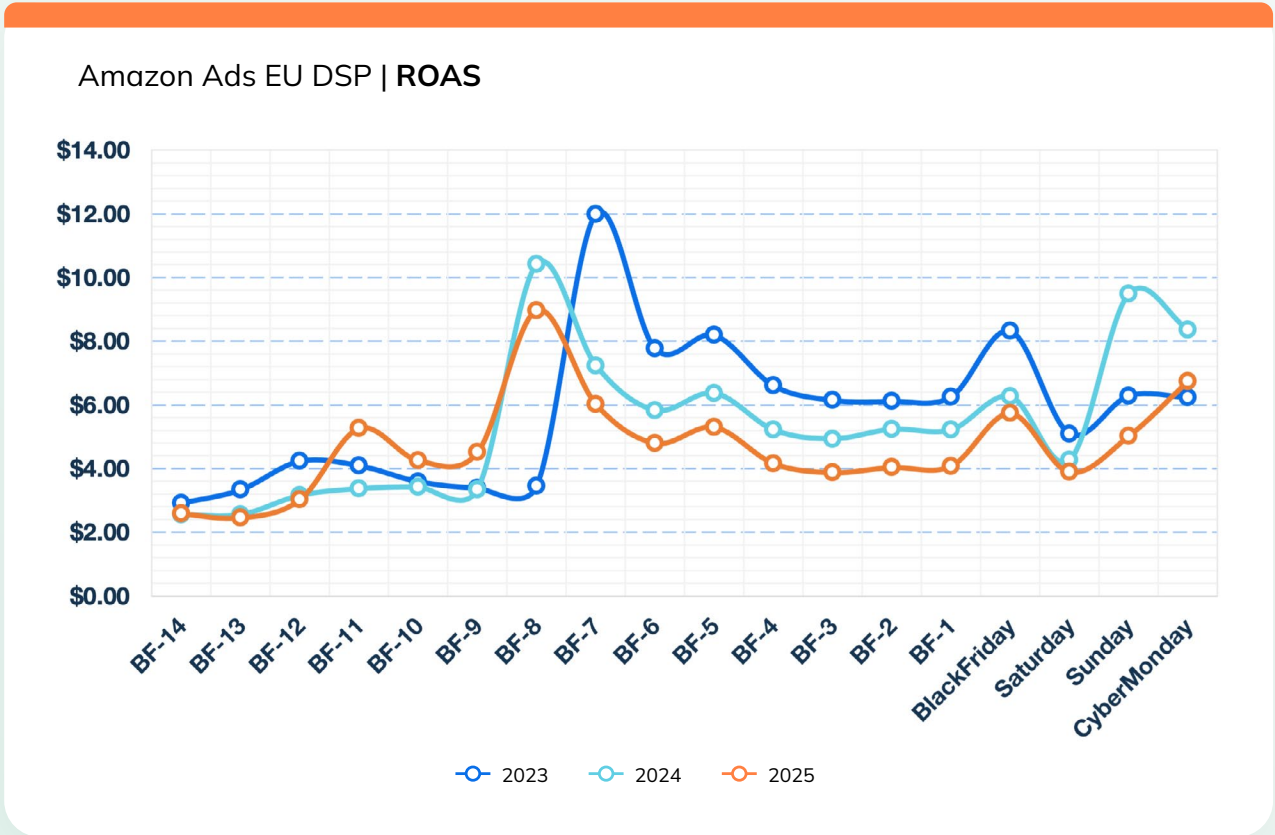
58.53%

New-to-Brand Sales
(Cyber Monday 2025)



ROAS

Amazon Ads EU DSP Benchmarks



\$5.74

Return on Ad Spend
(Black Friday 2025)

\$6.74

Return on Ad Spend
(Cyber Monday 2025)



In Europe, Amazon DSP advertisers enjoyed greater ROAS on Cyber Monday campaigns than Black Friday ones, breaking the pattern seen for Sponsored Ads – and DSP ads in the US – which may be the result of lower competition on the back end of this promotional period.

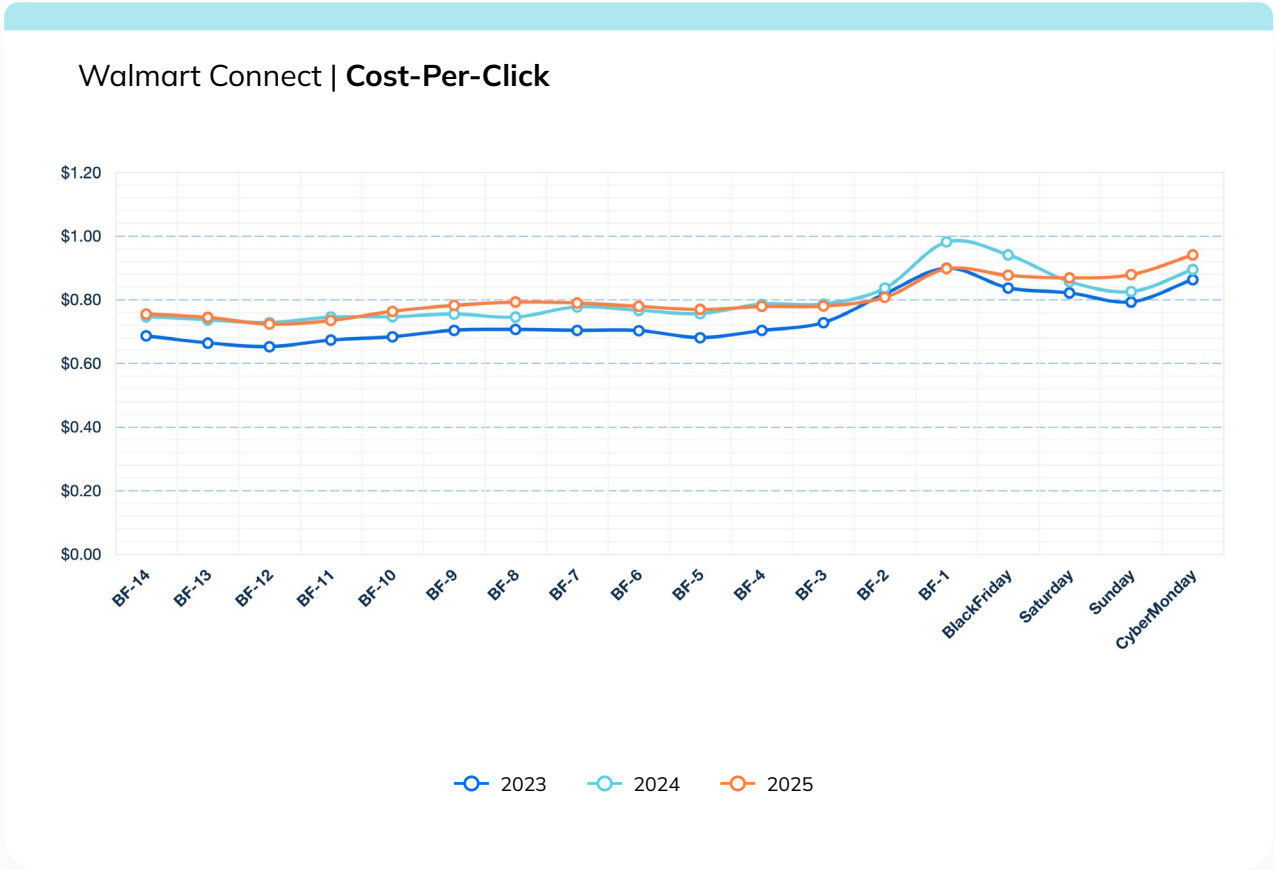


Walmart Connect

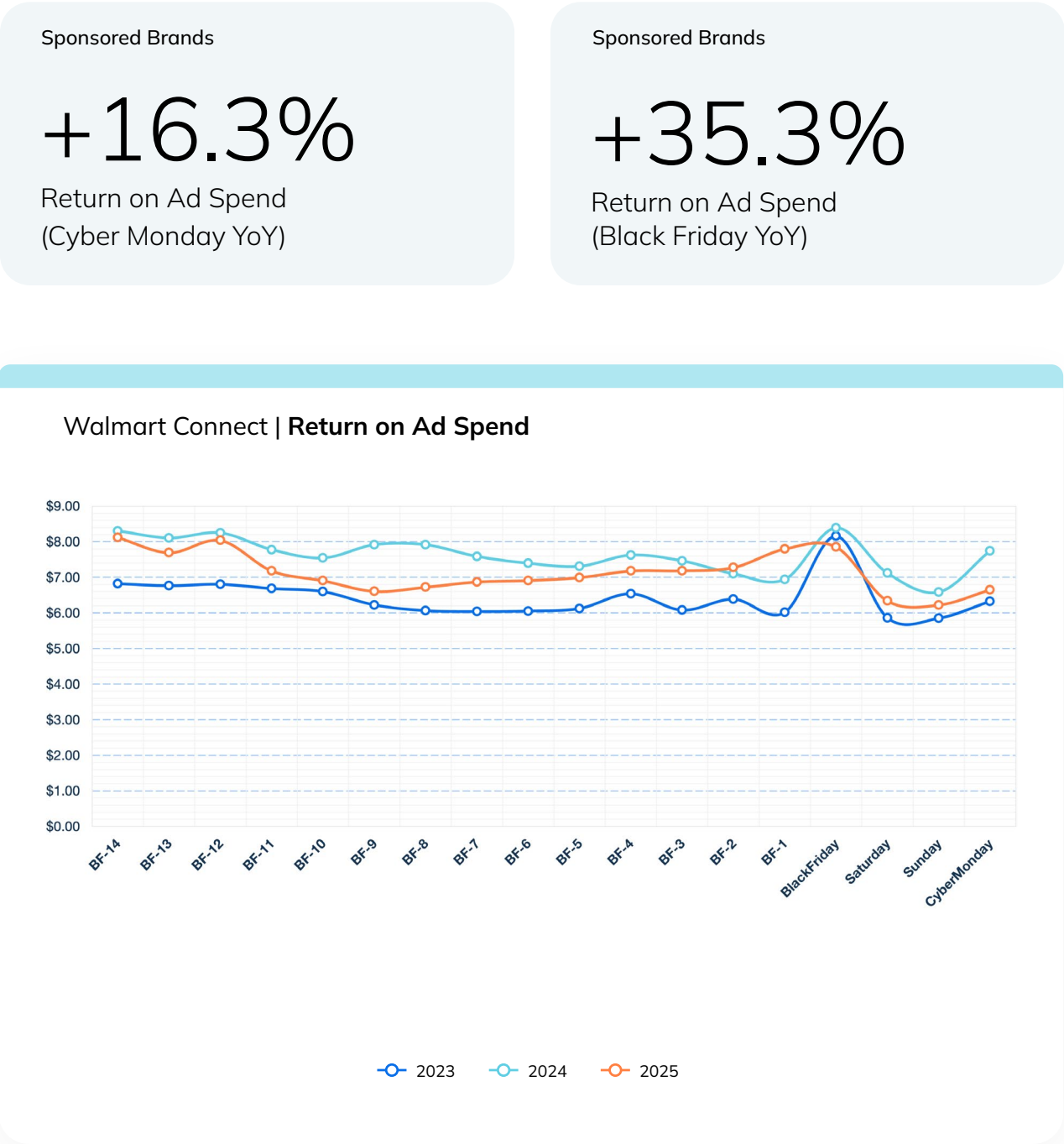
Sponsored Brands, Sponsored Products

CPC and ROAS

Walmart Connect Benchmarks



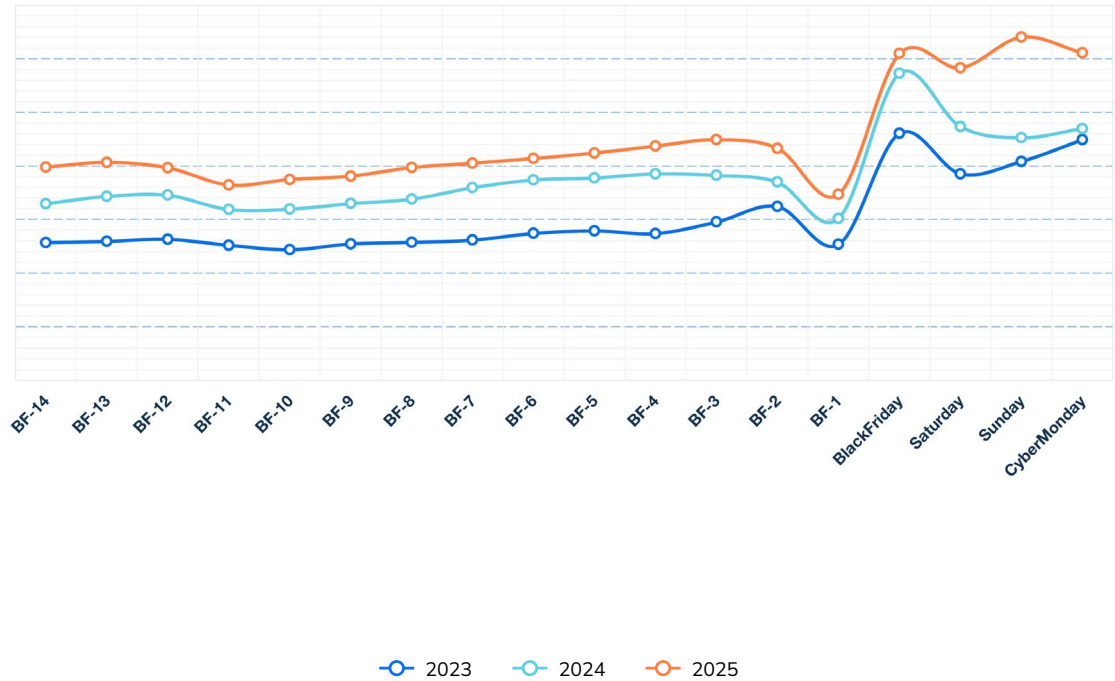
Despite more expensive CPCs and weaker conversion rates during Cyber 5 this year, Sponsored Brands campaigns ultimately saw stronger ROAS growth YoY on Cyber Monday (+16.3%) and Black Friday (+35.3%) than Sponsored Products ads, suggesting the performance gap between the two formats is beginning to narrow.



CVR and Spend

Walmart Connect Benchmarks

Walmart Connect | Brand Avg. Daily Spend



Sponsored Products

+32.5%

Average Daily Spend
(Cyber Monday YoY)

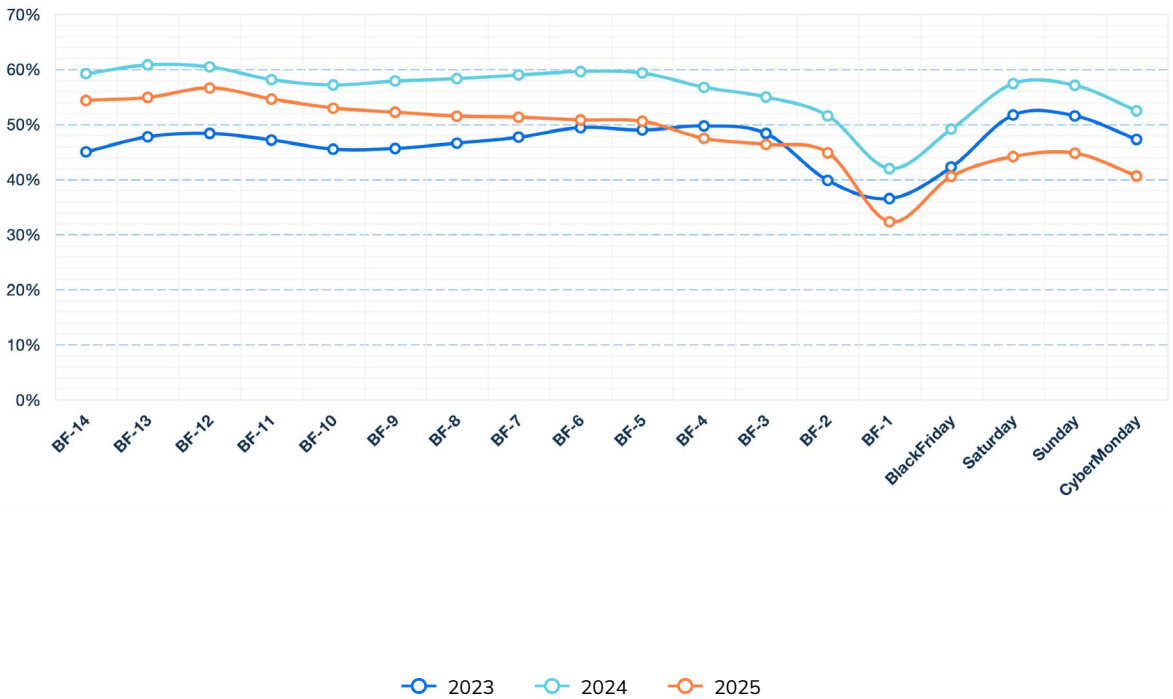
Sponsored Brands

+6.8%

Average Daily Spend
(Cyber Monday YoY)



Walmart Connect | Conversion Rate



Upcoming in the Industry

2026 Events

January 6-9

CES
Las Vegas, Nevada



March 24-26

Shoptalk
Las Vegas, Nevada



Coming in January

Watch for Pacvue's Q4 2025 Retail Media Benchmark Report for deeper insights into 2025 ad performance and guidance for 2026 strategies.



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Methodology

About the Report

Explore Pacvue and Helium 10's Cyber 5 2025 Retail Media Benchmark Report, containing Cyber 5 data and advertising trends for Amazon, Walmart, and Target. This report analyzes the current state of retail media across the United States and Europe (UK, Germany, France, Italy, Spain), helping you to benchmark your own performance and understand key industry trends.

How We Measure

This report provides an expansive overview of advertising data from Cyber 5, spanning the last three years. Insights are drawn from data gathered from thousands of advertisers using Pacvue's Commerce Operating System, representing diverse brand sizes and product categories.

About Us



Pacvue is the only fully integrated Commerce Operating System that seamlessly unifies retail media, commerce management, and advanced measurement to power growth across 100+ global marketplaces—including Amazon, TikTok, Walmart, Target, and Instacart.



A commerce suite of tools for entrepreneurs and businesses to manage and sell products, find keywords, identify trends, optimize listings, and more on Amazon, TikTok, & Walmart Connect. Helium 10 champions entrepreneurship at all stages with the playbook to build, grow, and scale a meaningful and steadfast e-commerce business.