PACVUE | Helium 10

2026 Mid-Year Commerce Media & Summer Sales Benchmark Report

Amazon • Walmart

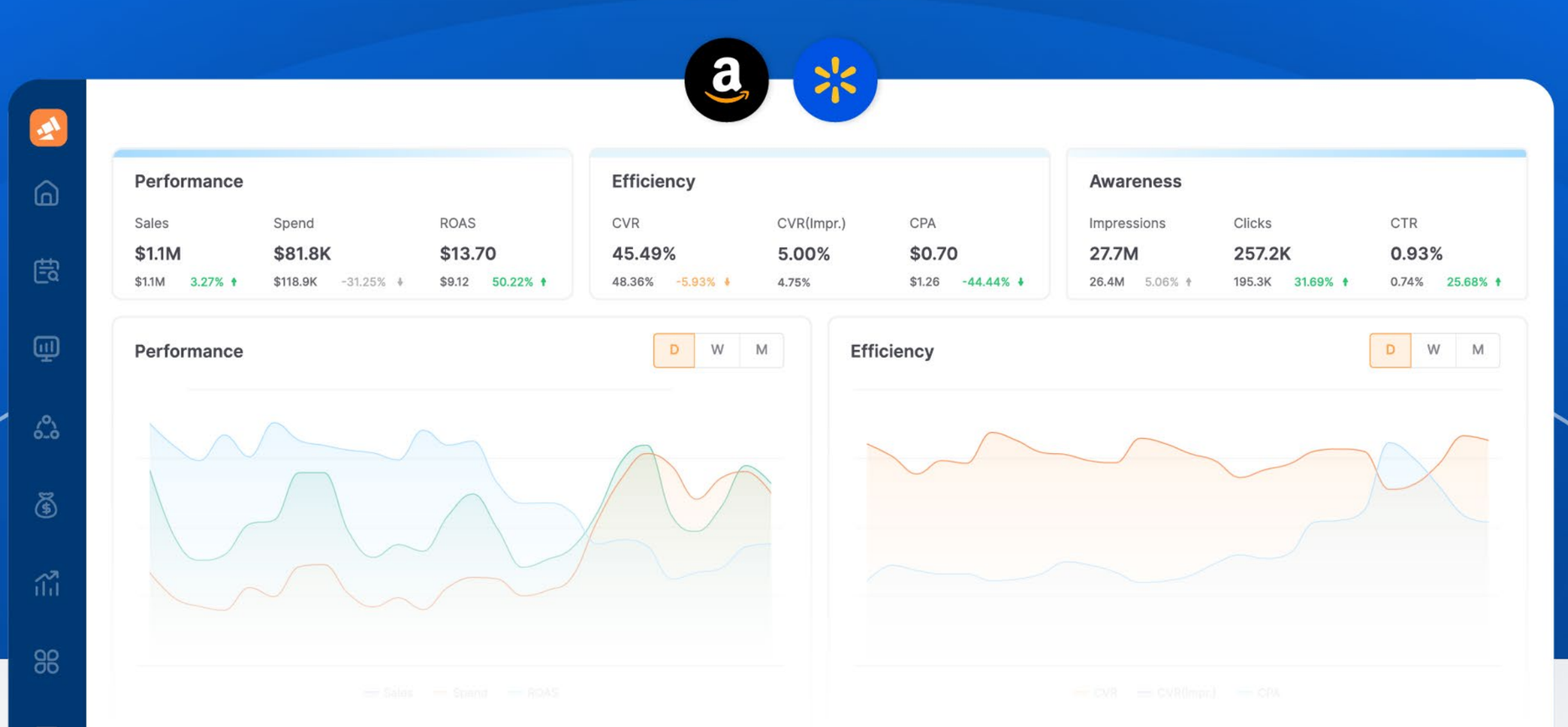


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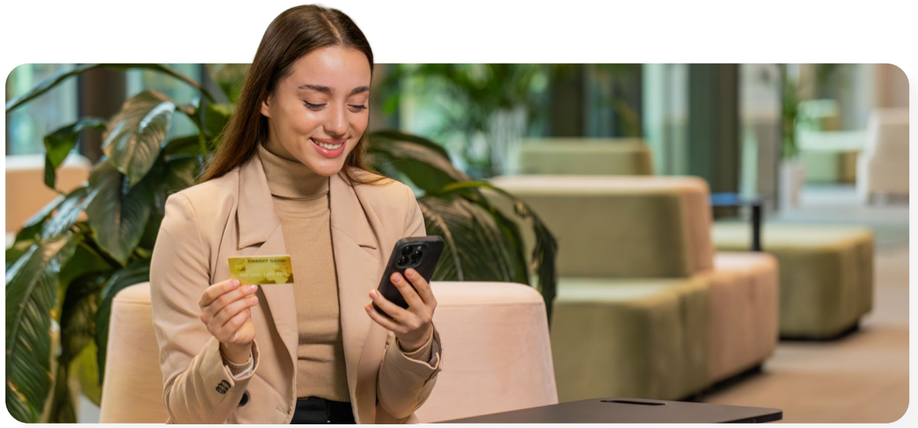
Key Findings

Amazon Sponsored Brand campaigns saw impressive CVR growth (+26.5% YoY), as advertisers scaled their spend on these upper-funnel placements (+21.6% YoY) to drive brand awareness in an increasingly crowded marketplace.

On Walmart, Sponsored Brand ads delivered stronger engagement at a lower cost, with CTR improving (+75% YoY) and CPC falling (-15.6% YoY) despite advertisers increasing spend (+34.1% YoY) on the format.

Advertisers invested more in upper-funnel, brand-building strategies on Amazon DSP, where the spend share of Sponsored Video rose +20% YoY to capture almost a third of DSP advertising dollars in Q2.

Amazon shoppers prioritized essentials, as categories like Grocery & Gourmet (36.7% CVR), Pet Supplies (25.5% CVR) and Beauty & Personal Care (23.4% CVR) saw robust conversion rates in Q2, while advertisers allocated more of their budget to Sponsored Brand campaigns to promote these products.



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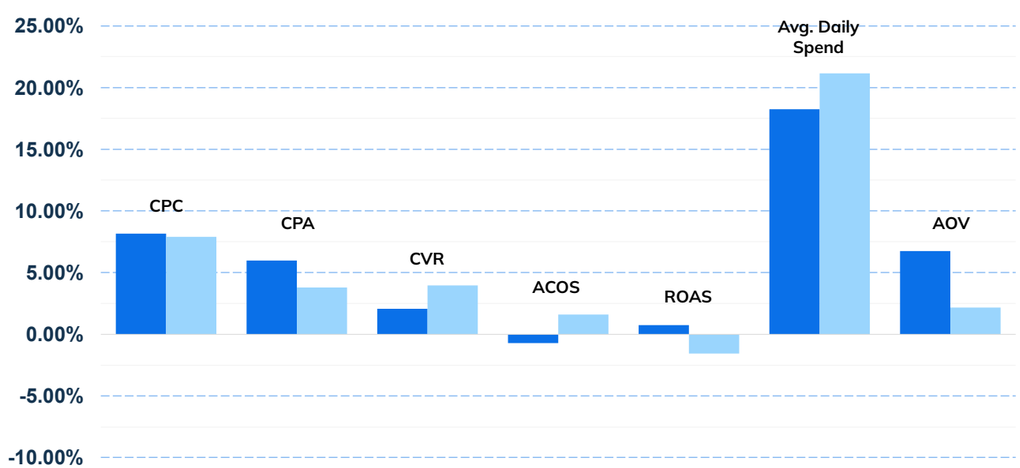
State of Commerce Media

Q2 Retailer KPI Trends

Amazon

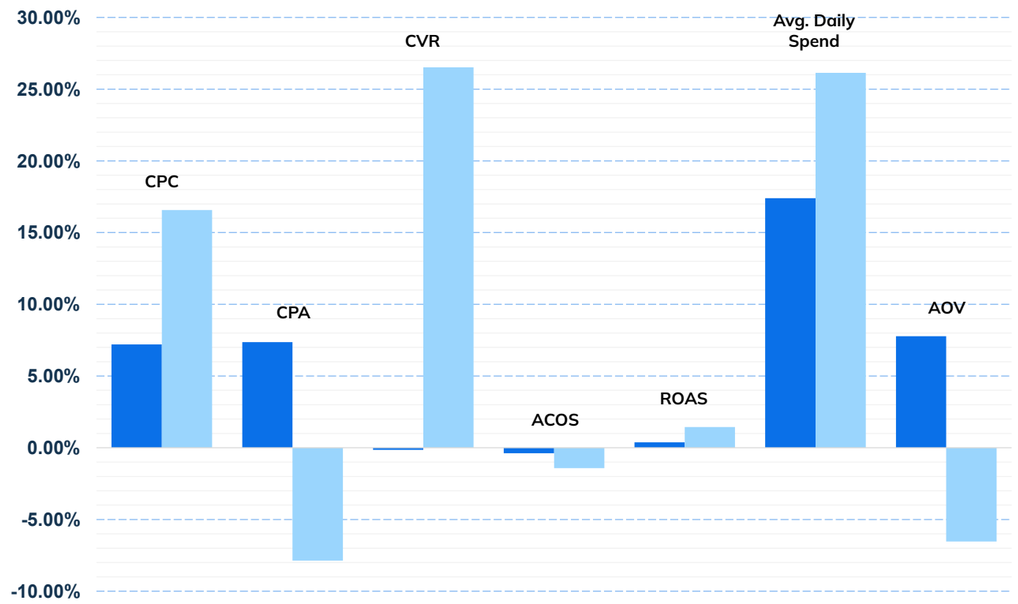
Retailer Tables · Amazon Advertising Trends

Amazon Advertising Trends | **Sponsored Product**



	CPC	CPA	CVR	ACOS	ROAS	Avg. Daily Spend	AOV
QoQ Sponsored Product	8.1%	6.0%	2.1%	-0.7%	0.7%	18.3%	6.7%
YoY Sponsored Product	7.9%	3.8%	4.0%	1.6%	-1.6%	21.2%	2.2%

Amazon Advertising Trends | **Sponsored Brand**

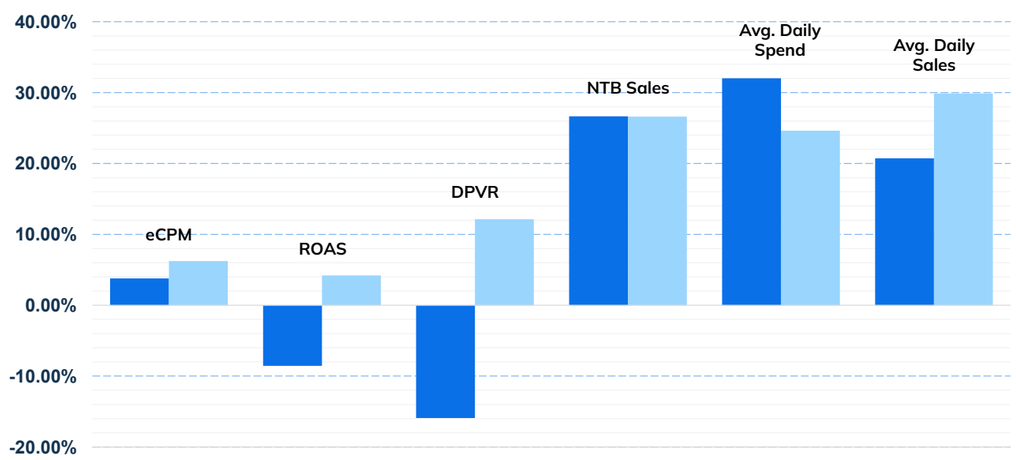


	CPC	CPA	CVR	ACOS	ROAS	Avg. Daily Spend	AOV
QoQ Sponsored Brand	7.2%	7.4%	-0.1%	-0.4%	0.4%	17.4%	7.8%
YoY Sponsored Brand	16.6%	-7.9%	26.5%	-1.4%	1.4%	26.1%	-6.5%

Amazon DSP

Retailer Tables · Amazon Advertising Trends

Amazon Advertising Trends | **DSP**



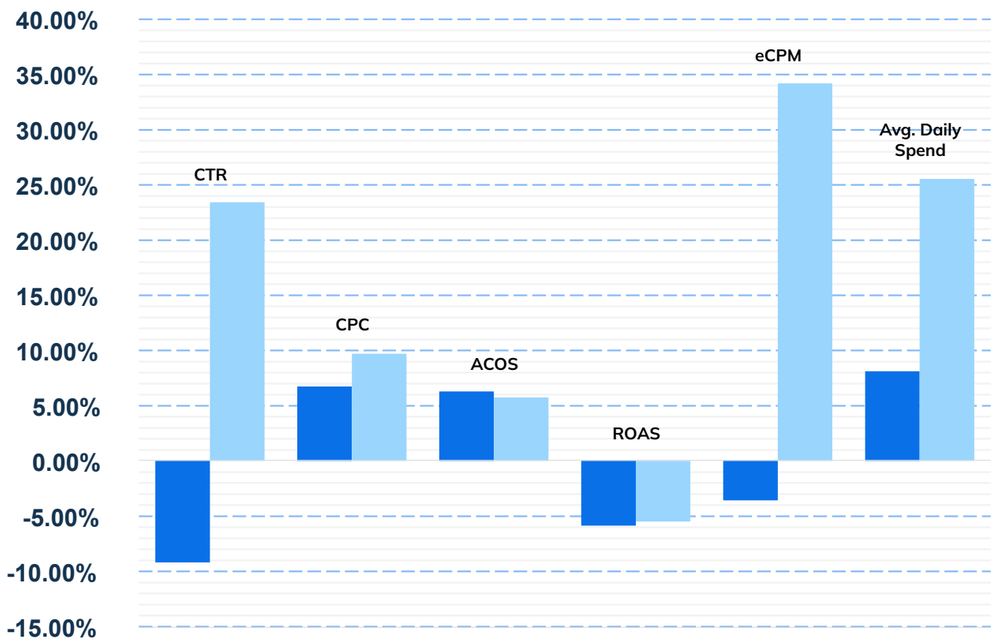
	eCPM	ROAS	DPVR	NTB Sales	Avg. Daily Spend	Avg. Daily Sales
QoQ DSP Display	3.8%	-8.6%	-15.9%	26.6%	32.0%	20.7%
YoY DSP Display	6.2%	4.2%	12.1%	26.6%	24.6%	29.9%



Walmart

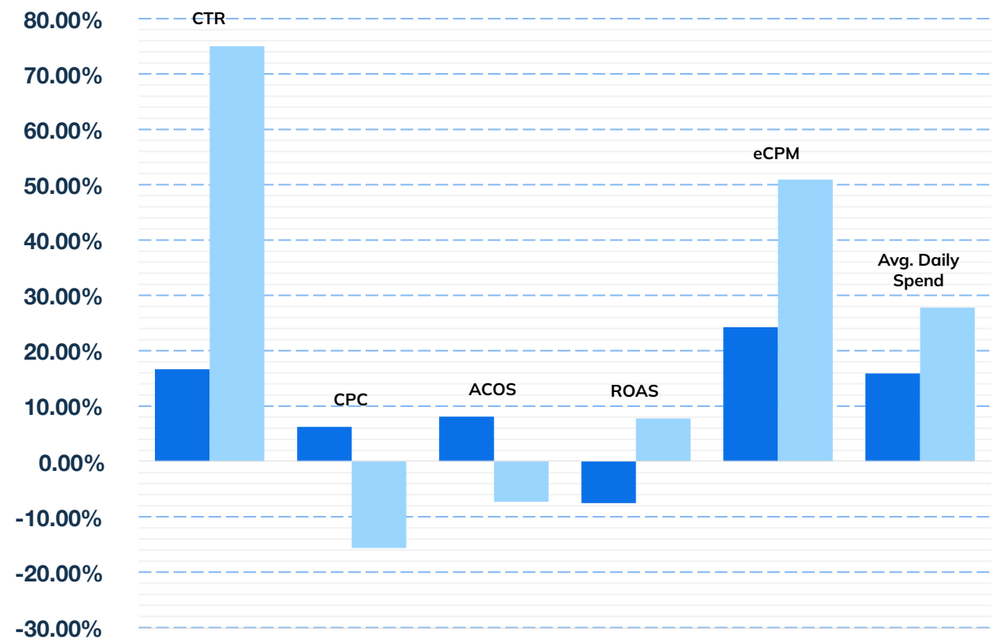
Retailer Tables · Walmart Advertising Trends

Walmart Advertising Trends | **Sponsored Product**



	CTR	CPC	ACOS	ROAS	eCPM	Avg. Daily Spend
QoQ Sponsored Product	-9.2%	6.8%	6.3%	-5.9%	-3.6%	8.1%
YoY Sponsored Product	23.4%	9.7%	5.8%	-5.5%	34.2%	25.5%

Walmart Advertising Trends | **Sponsored Brand**

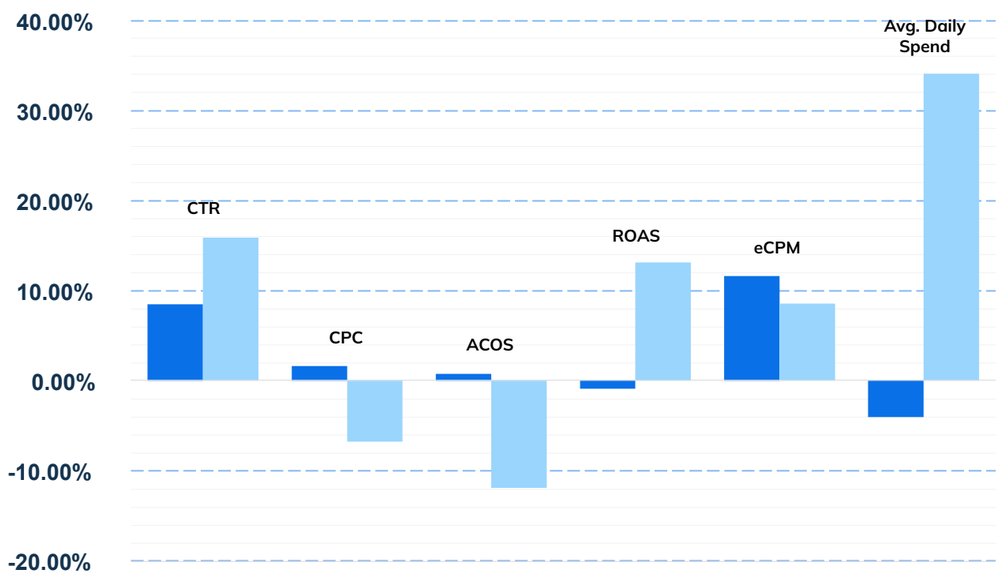


	CTR	CPC	ACOS	ROAS	eCPM	Avg. Daily Spend
QoQ Sponsored Brand	16.7%	6.2%	8.1%	-7.5%	24.3%	15.9%
YoY Sponsored Brand	75.0%	-15.6%	-7.2%	7.7%	50.9%	27.8%

Walmart

Retailer Tables · Walmart Advertising Trends

Walmart Advertising Trends | **Sponsored Video**



	CTR	CPC	ACOS	ROAS	eCPM	Avg. Daily Spend
QoQ Sponsored Video	8.5%	1.6%	0.8%	-0.9%	11.6%	-4.0%
YoY Sponsored Video	15.9%	-6.8%	-11.9%	13.2%	8.6%	34.1%



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Ad Format Trends

Q2 Retailer Trends

> “One of the biggest themes at Cannes Lions this year was retail media networks evolving into full-funnel advertising platforms. I suspect that as we move into the back half of 2026, we’ll see RMNs emphasize more upper-funnel formats--particularly video. Not only will on-site video become a more important part of the mix, but we will also see retail media power a growing percentage of social video, CTV, and in-store digital.”

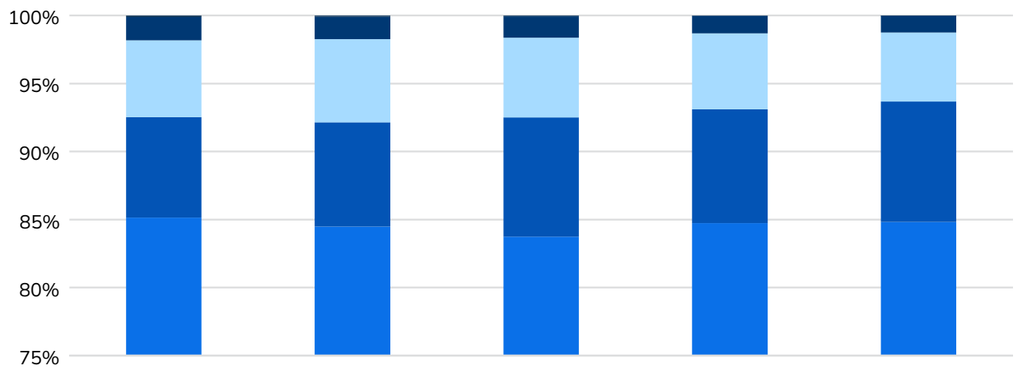


Andrew Lipsman
Founding Advisor & Strategist, Colosseum Strategy

Amazon

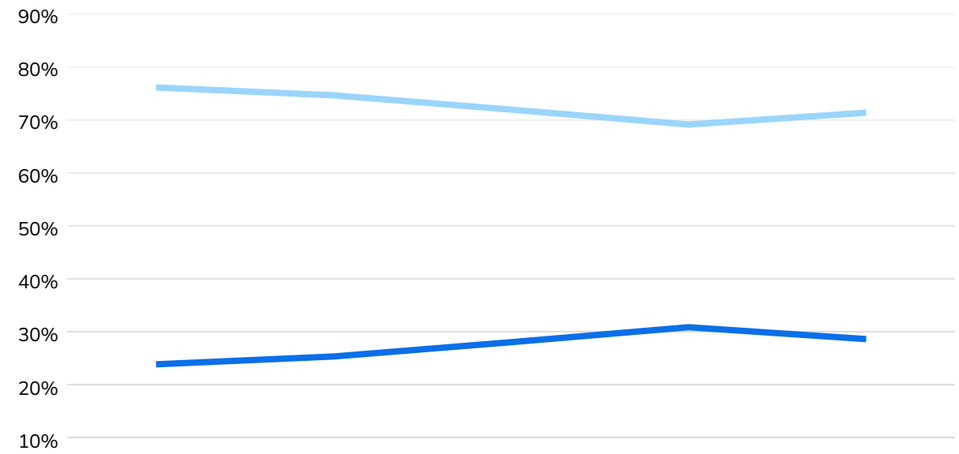
Ad Format Trends

Amazon Sponsored Ads | **Ad Type Spend Share Over Time**



	2025 Q2	2025 Q3	2025 Q4	2026 Q1	2026 Q2
SD-Non Video	1.72%	1.66%	1.57%	1.27%	1.22%
SBV	5.63%	6.13%	5.87%	5.58%	5.09%
SB-Non Video	7.40%	7.64%	8.75%	8.35%	8.86%
SP	85.13%	84.49%	83.75%	84.74%	84.81%

Amazon DSP | **Video vs Static Format Spend Share**



	2025 Q2	2025 Q3	2025 Q4	2026 Q1	2026 Q2
Video	23.80%	25.26%	27.99%	30.82%	28.57%
Non-Video	76.20%	74.74%	72.01%	69.18%	71.43%

Across Amazon, advertisers shifted a growing share of investment toward upper- and mid-funnel formats. The shift is most pronounced on DSP, where video rose to 29% of spend from 24% a year earlier - leading a broader move toward brand-building investment.

CTR, CPC, CVR & ROAS

Retailer KPI Trends ▪ Amazon Sponsored Prompts

Just launched (03/25/26), Amazon Sponsored Prompts automatically engage shoppers with relevant product information, and the ad format already shows stronger profitability for Sponsored Brands ($11.64 Q2 2026) than Sponsored Products ($4.27 Q2 2026) campaigns, mostly driven by the former's lower CPC ($0.40 Q2 2026).

Sponsored Prompts | **Amazon US**

Quarter	Campaign Type	CTR	CPC	CVR	ROAS
2026 Q2	Sponsored Brand	0.08%	$0.40	10.67%	$11.64
2026 Q2	Sponsored Product	0.17%	$1.30	11.27%	$4.27

"Heading into H2, two shifts are top of mind. First is New York's new AI-disclosure law for advertising content. It will be worth watching whether this pushes brands back toward traditional production, and whether brands with existing, legitimately-shot content gain an edge over those that have leaned heavily on AI-generated assets. Second is the growing importance of GEO — making sure product content, descriptions, and titles are structured for AI-driven recommendations. As more shopping discovery happens through tools like ChatGPT, brands that adapt their content strategy for AI search will have a real advantage in discoverability."



John Warren
VP of Partnerships, Podean



Sponsored Brand

$11.64

Return on Ad Spend (Q2 2026)

Sponsored Brand

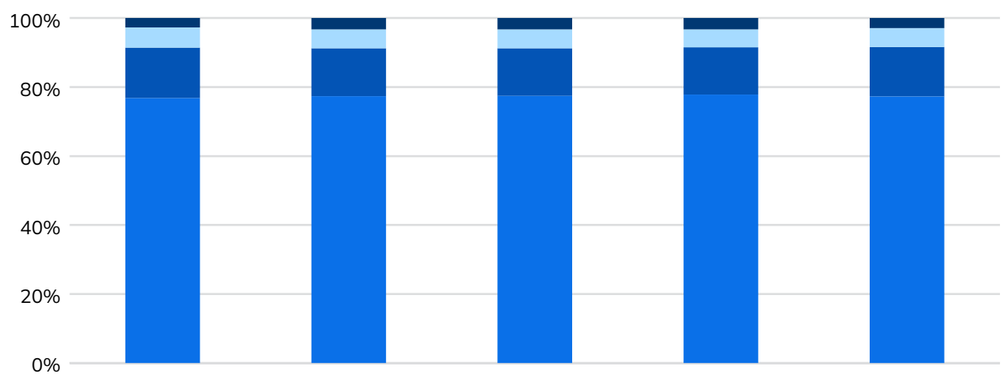
$0.40

Cost-per-Click (Q2 2026)

Walmart

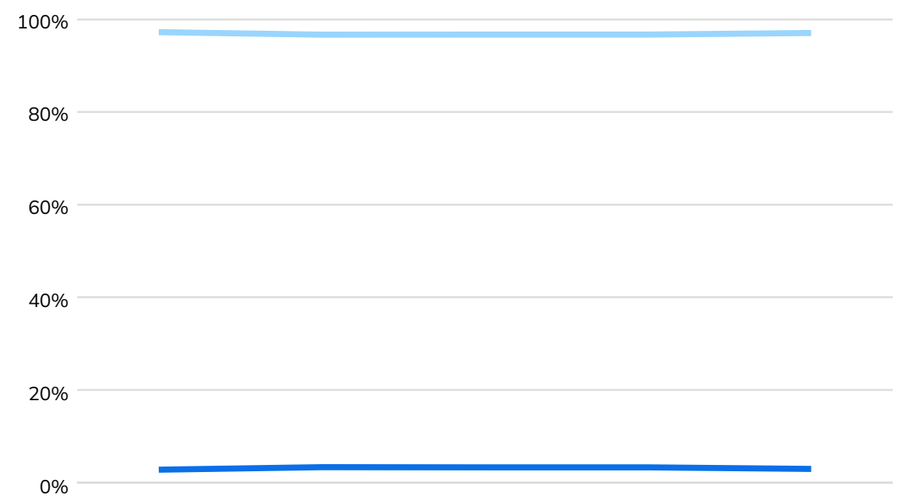
Ad Format Trends

Walmart Connect | **Ad Type Spend Share Over Time**



	2025 Q2	2025 Q3	2025 Q4	2026 Q1	2026 Q2
SV	2.76%	3.30%	3.30%	3.25%	2.92%
SB	5.87%	5.49%	5.47%	5.27%	5.51%
Display	14.60%	13.88%	13.79%	13.62%	14.32%
SP	76.77%	77.33%	77.43%	77.85%	77.25%

Walmart Connect | **Video vs Static Format Spend Share**



	2025 Q2	2025 Q3	2025 Q4	2026 Q1	2026 Q2
Video	97.24%	96.70%	96.70%	96.75%	97.08%
Non-Video	2.76%	3.30%	3.30%	3.25%	2.92%

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Amazon Category Trends

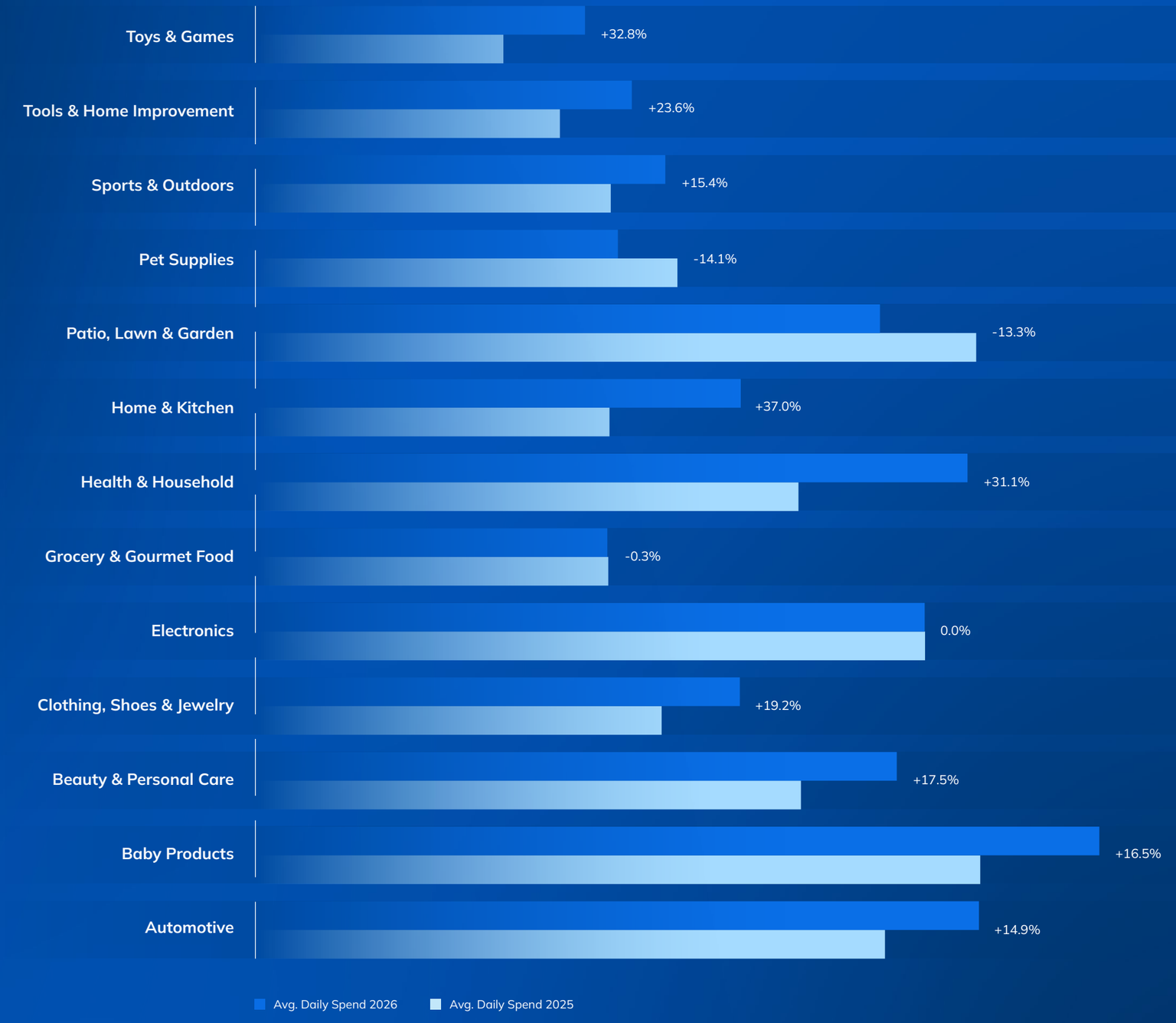
Q2 Amazon US Data

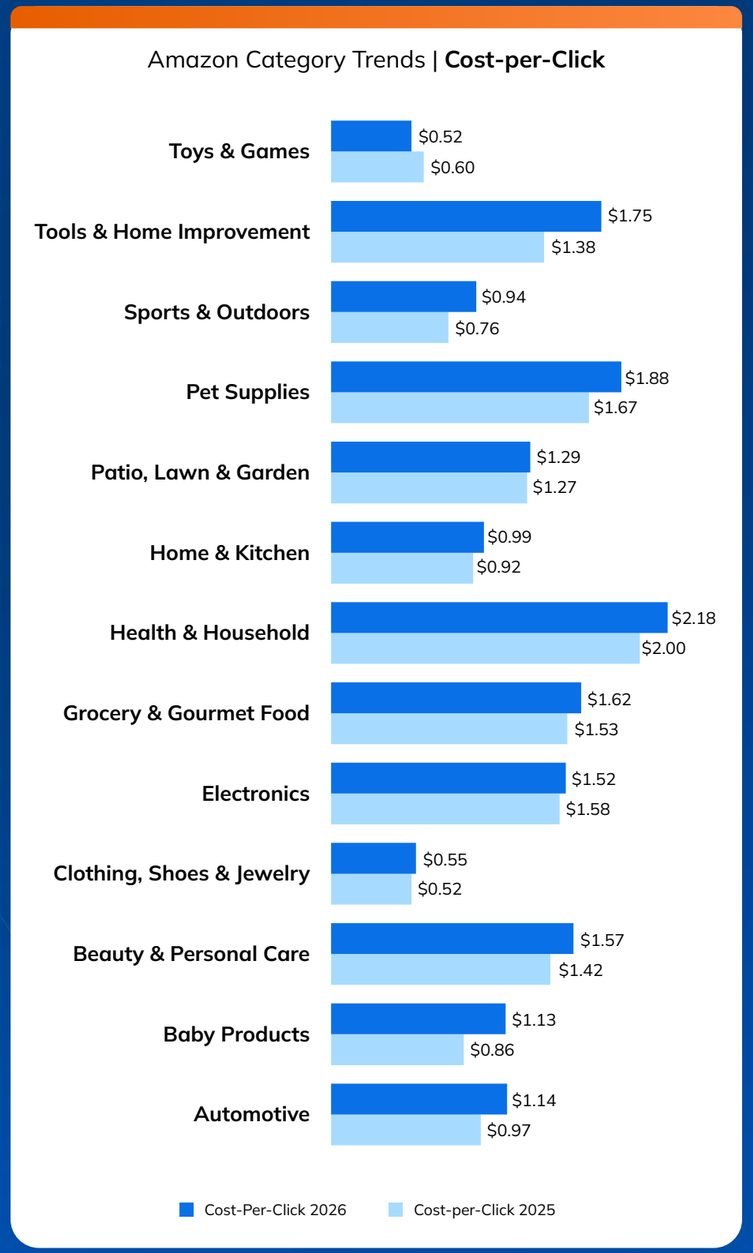
Spend

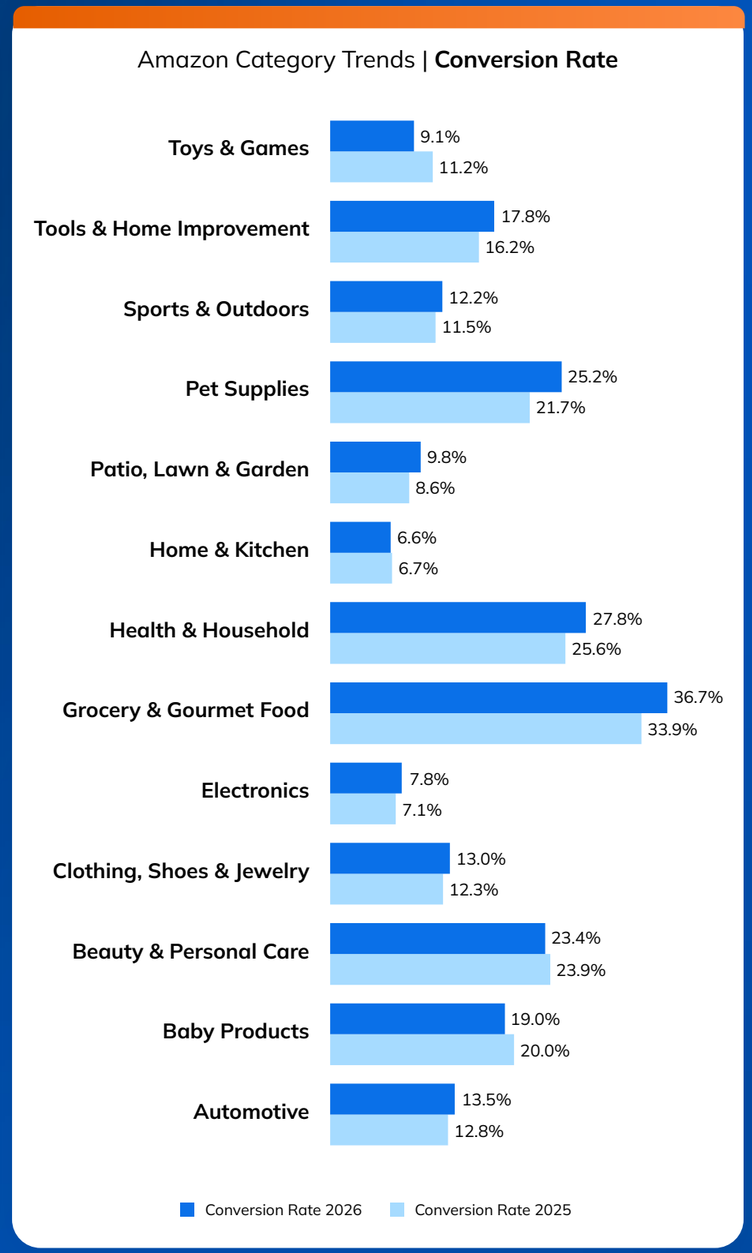
Amazon Category Trends

Baby Products had the highest brand average daily spend in Q2, followed closely by Health & Household.









CPC & CVR

Amazon Category Trends

CPC rose year-over-year in 11 of 13 categories, confirming broad upward pressure on Sponsored Products traffic costs.

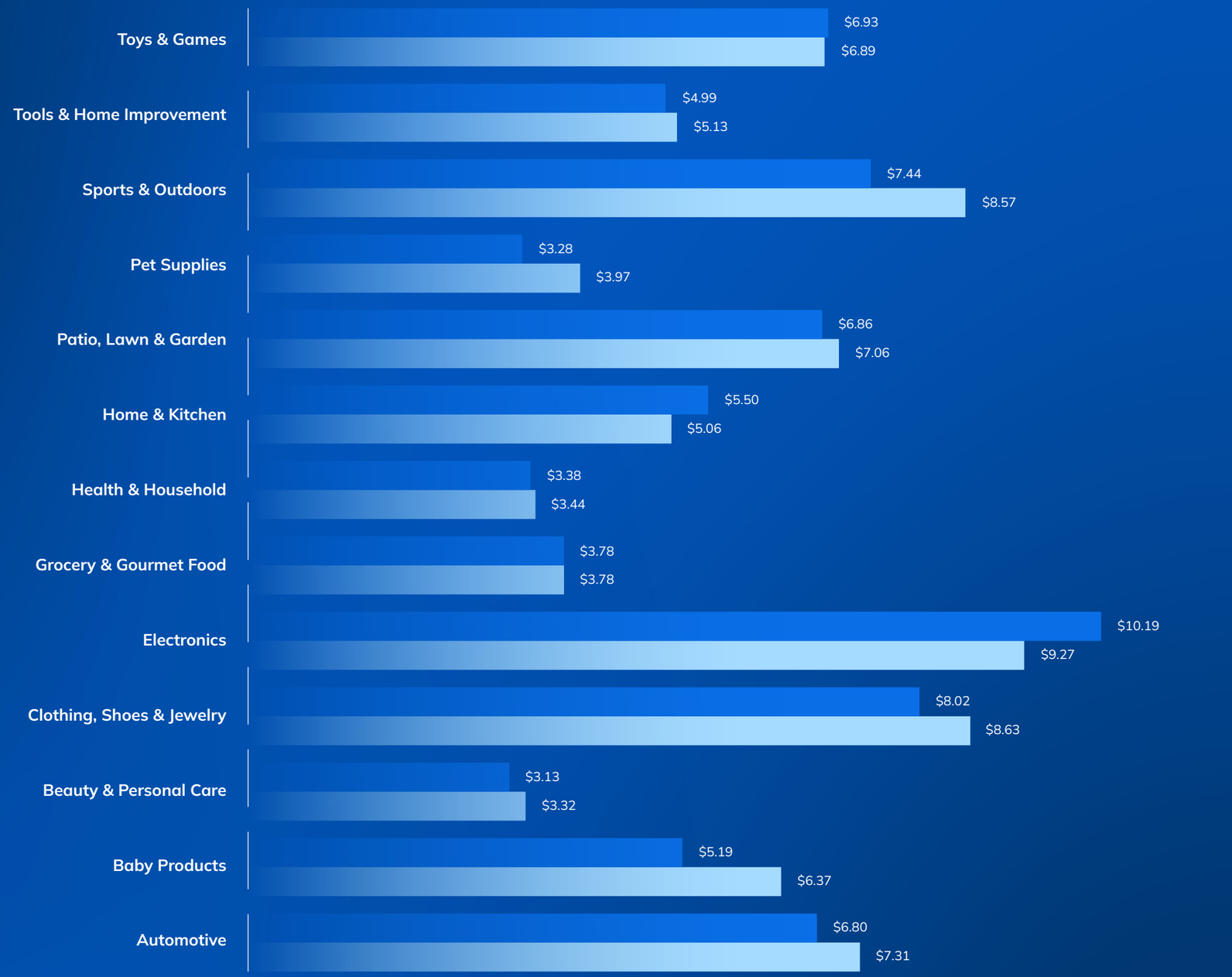
Grocery & Gourmet Food achieved the highest conversion rate at 36.7% (well above all other categories).

ROAS

Amazon Category Trends

Clothing, Shoes & Jewelry had the most cost-efficient traffic in Q2, recording the lowest CPC ($0.55) alongside a strong ROAS ($8.02).

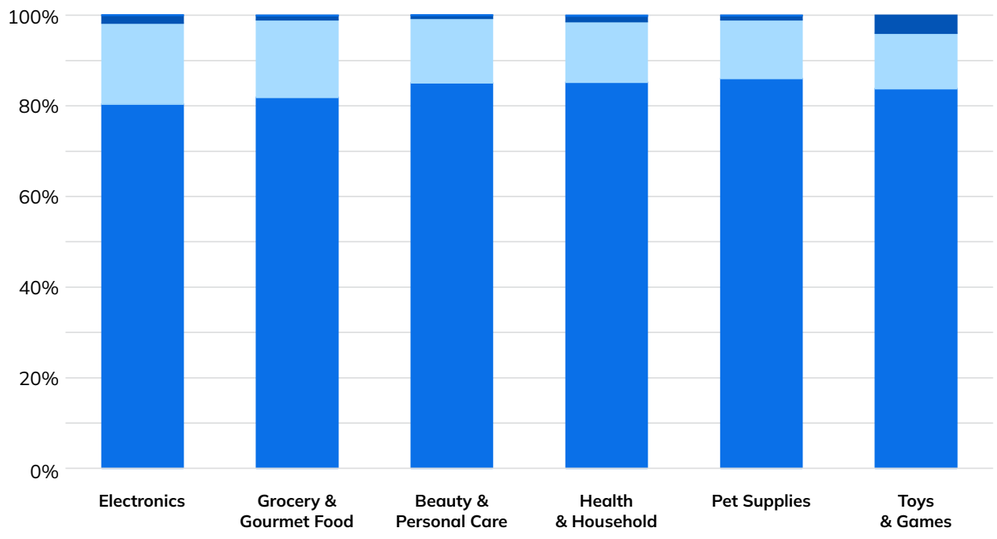




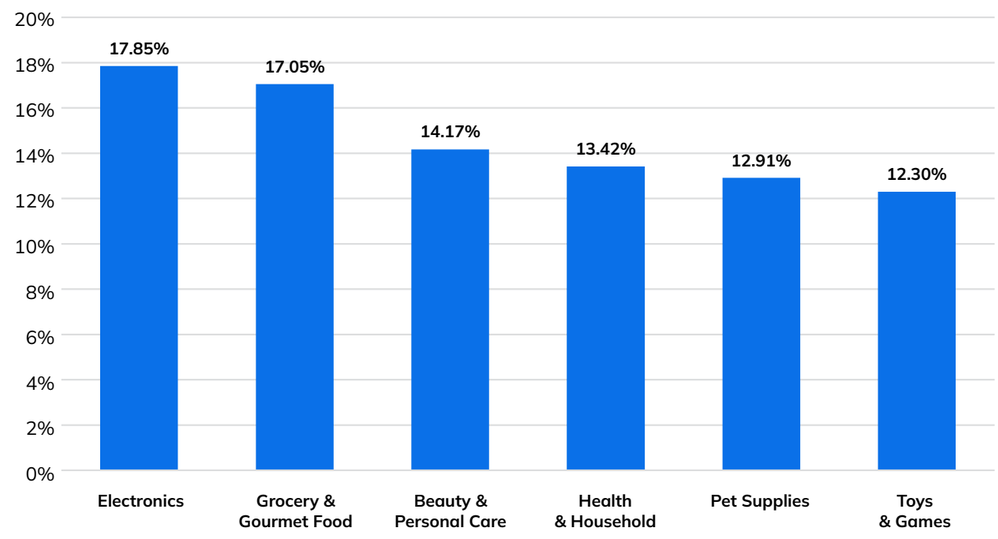
Spend Share by Ad Type

Amazon Category Trends

Amazon Category Trend | **Ad Format Spend Share by Category**



Amazon Category Trend | **Sponsored Brand Spend Share by Category**



	Electronics	Grocery & Gourmet Food	Beauty & Personal Care	Health & Household	Pet Supplies	Toys & Games
SP	80.44%	81.93%	85.13%	85.22%	86.08%	83.85%
SB	17.85%	17.05%	14.17%	13.42%	12.91%	12.30%
SD	1.70%	0.99%	0.69%	1.26%	0.95%	3.85%
STV	0.01%	0.03%	0.01%	0.10%	0.06%	0.00%

While Sponsored Products still accounts for the majority of ad spend, Sponsored Brands now make up a notable portion, nearing or exceeding 15% across key categories. Electronics had the highest share of Sponsored Brands spend in Q2 at 17.85%, followed by Grocery at 17.05% and Beauty & Personal Care at 14.17%. As Sponsored Brands reaches this scale, it is becoming a more deliberate part of category strategy rather than a secondary format.

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Seasonal Storylines

Q2 Summer Sales

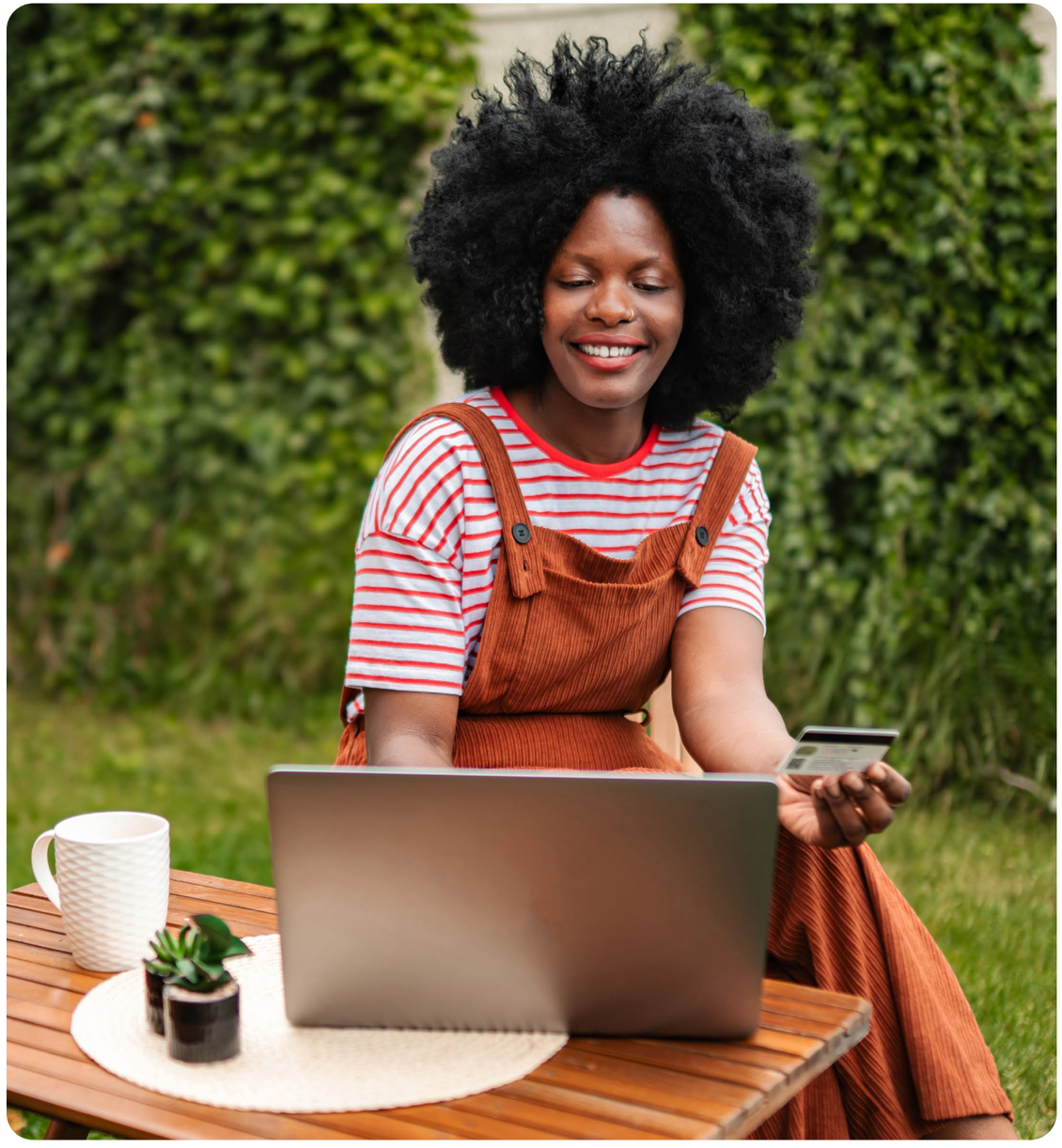
Summer Sales Overview

Seasonal Storylines

This year, Prime Day profitability was front-loaded: Amazon Sponsored Products ROAS peaked at $5.17 on Day 1 and fell to $4.07 by Day 4, with Sponsored Brand ROAS following a similar pattern, as surging CPC and stiffer competition steadily eroded returns.

Brands deprioritized Amazon Sponsored Display ads, cutting spend (-41.4% YoY)—which reduced sales in turn (-68.7% Day 1)—to reallocate budget to more conversion-focused formats like Sponsored Products and Sponsored Brand.

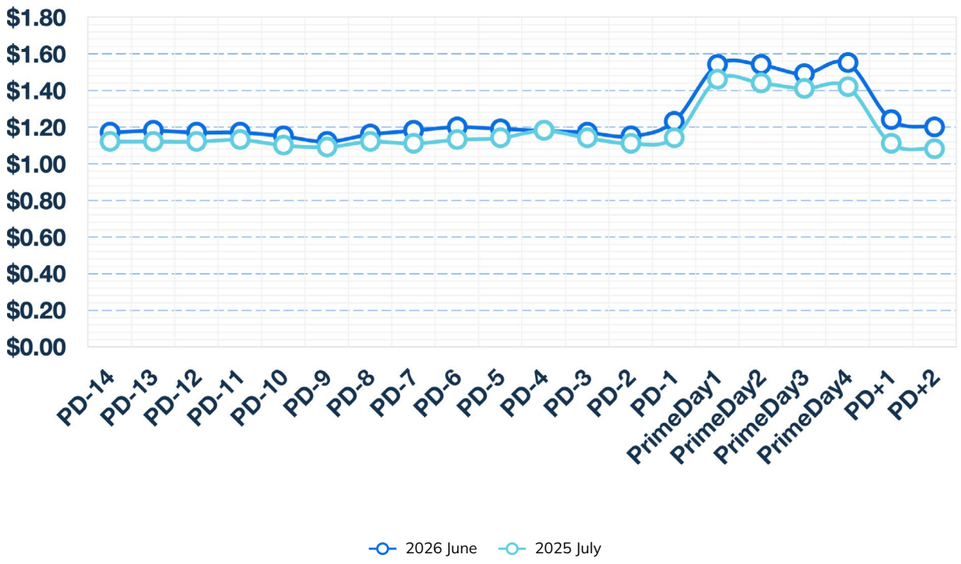
On Walmart, Sponsored Brand CTR surged (+67.03% YoY) even as CPC was relatively flat (+2.53% YoY), demonstrating that advertisers don't need to win bidding wars to drive superior click performance on the platform, which remains less saturated and more efficient than Amazon.



CPC & Spend

Amazon Prime Day Trends • Sponsored Product

Amazon Prime Day Trends | **Cost-per-Click**



+6.81%

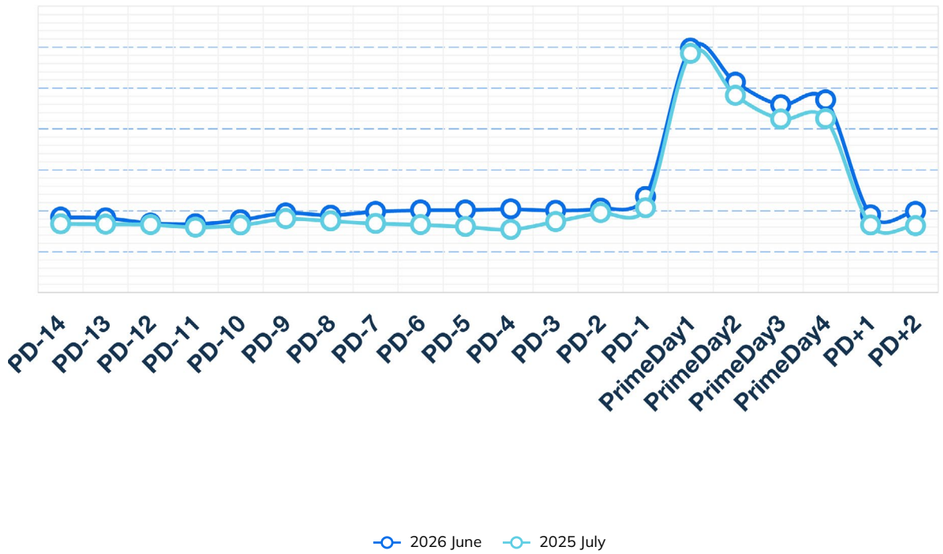
Cost-per-Click (YoY)

+6.47%

Avg. Daily Spend (YoY)

During Prime Day, brands increased average daily spend for Sponsored Products by more than 150% compared to the week prior, with spend hitting its highest point during Day 1 of the sale.

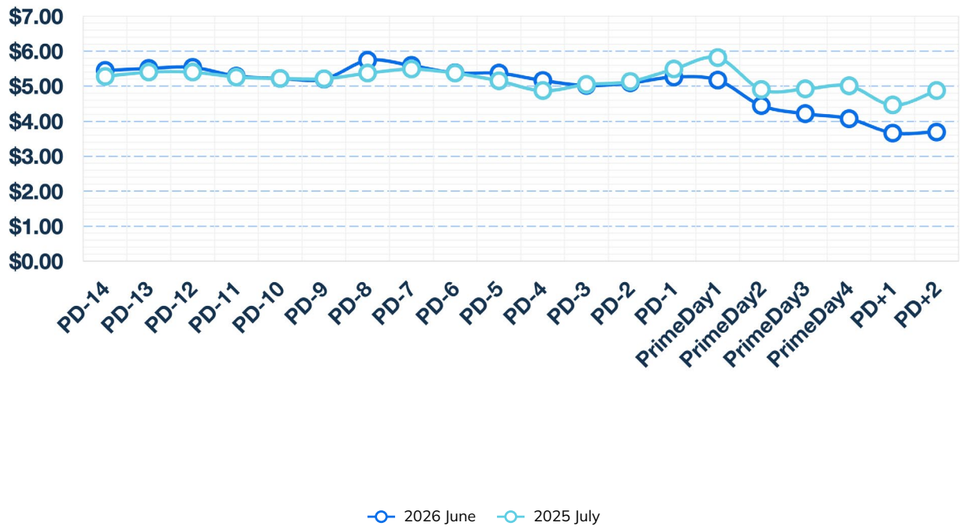
Amazon Prime Day Trends | **Brand Avg. Daily Spend**



ROAS & CVR

Amazon Prime Day Trends • Sponsored Product

Amazon Prime Day Trends | **Return on Ad Spend**



Sponsored Product ROAS hit its peak at the start of the event, reaching $5.17 on Day 1 before steadily declining to $4.07 by Day 4.

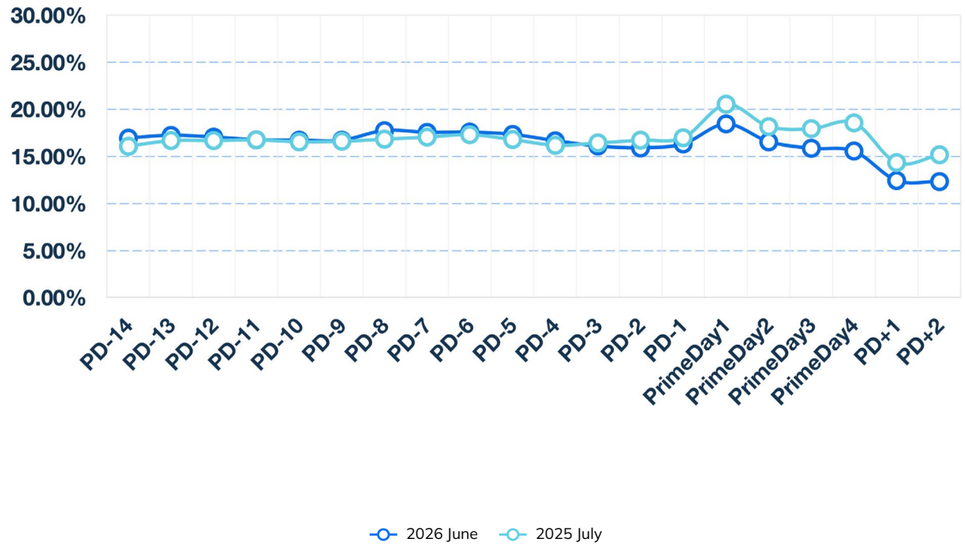
-13.32%

Return on Ad Spend (YoY)

-11.7%

Conversion Rate (YoY)

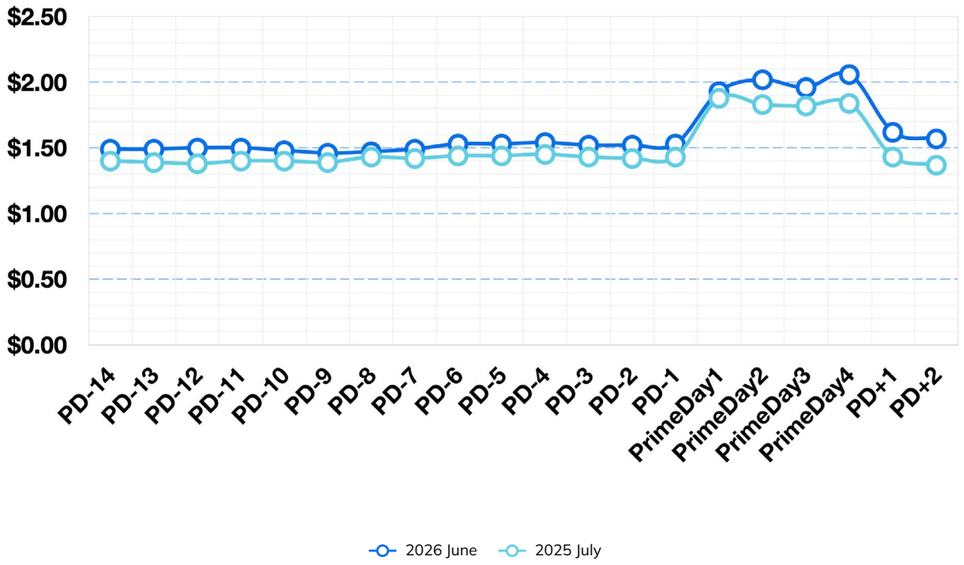
Amazon Prime Day Trends | **Conversion Rate**



CPC & Spend

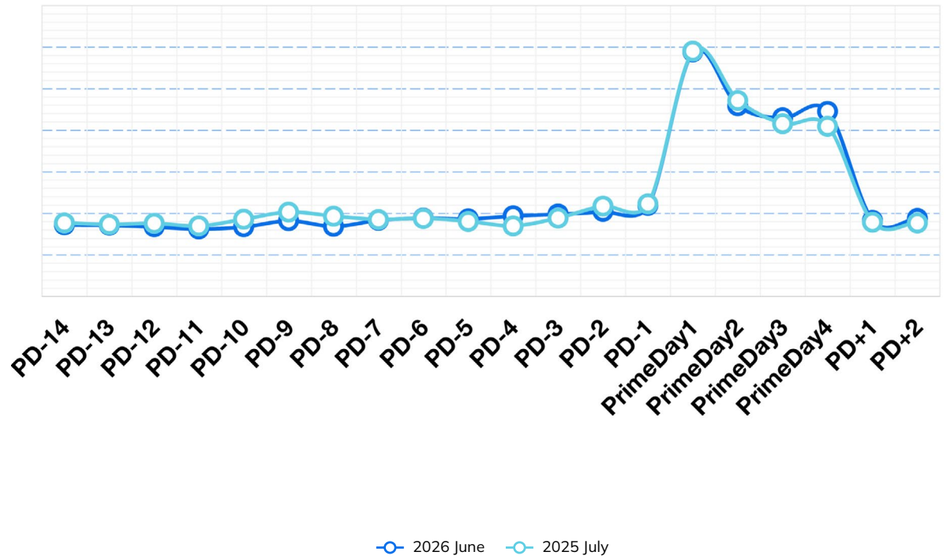
Amazon Prime Day Trends • Sponsored Brand

Amazon Prime Day Trends | **Cost-per-Click**



CPC rose as competition increased throughout Prime Day, with Cost-per-Click hitting a peak of $2.06 on Day 4 of the sale.

Amazon Prime Day Trends | **Brand Avg. Daily Spend**



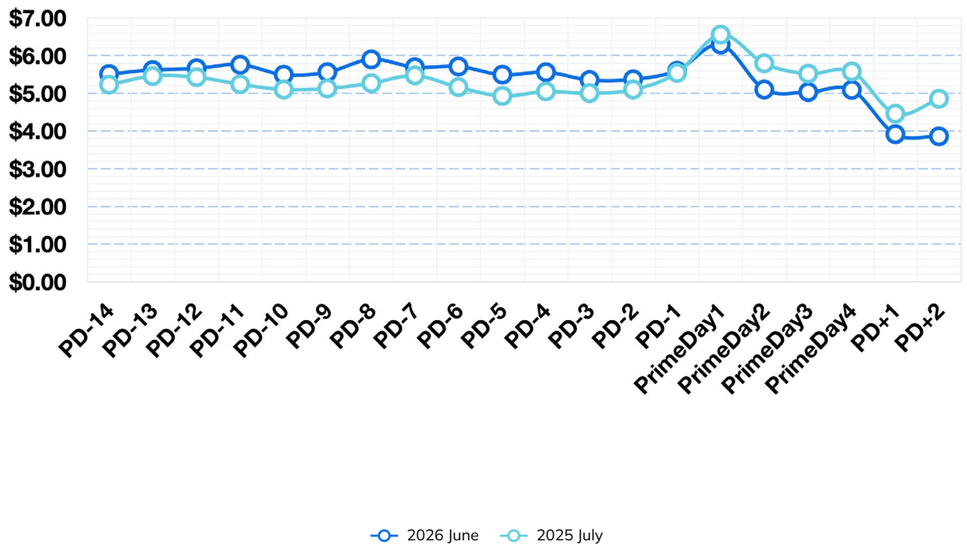
+8.1%
Cost-per-Click (YoY)

+1.8%
Avg. Daily Spend (YoY)

ROAS & CVR

Amazon Prime Day Trends • Sponsored Brand

Amazon Prime Day Trends | **Return on Ad Spend**



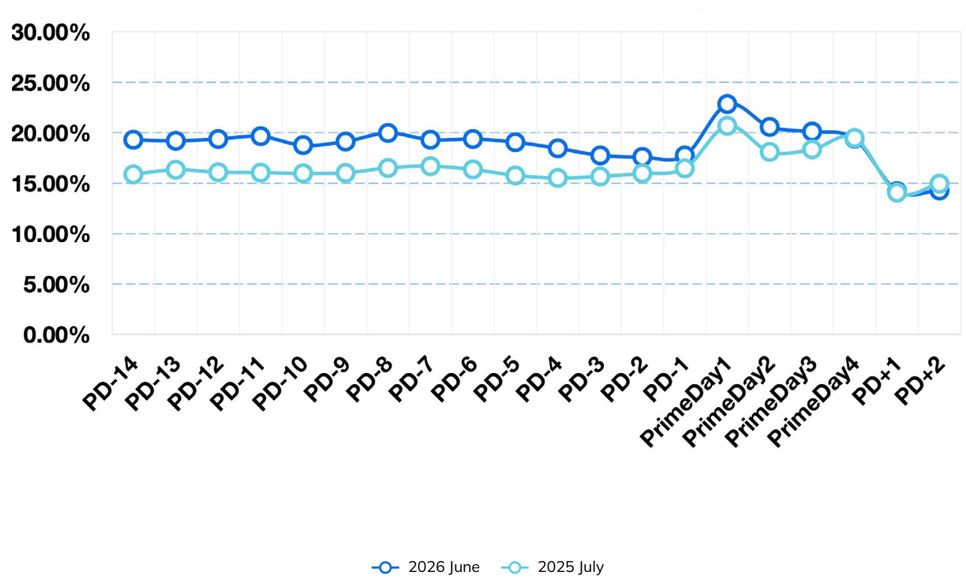
-8.3%

Return on Ad Spend (YoY)

+8.3%

Conversion Rate (YoY)

Amazon Prime Day Trends | **Conversion Rate**

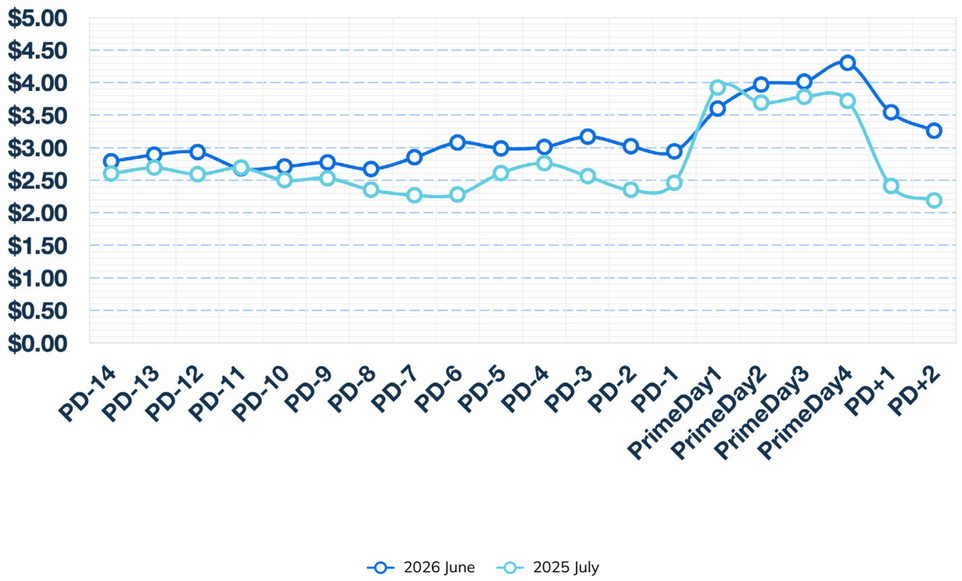


Brands reached the highest-intent buyers early during the sale, with conversion rate peaking at 22.83% on Day 1 of Prime Day before steadily declining through Day 4.

eCPM & Spend

Amazon Prime Day Trends • Sponsored Display

Amazon Prime Day Trends | **Effective Cost-per-Mille**



+5.1%

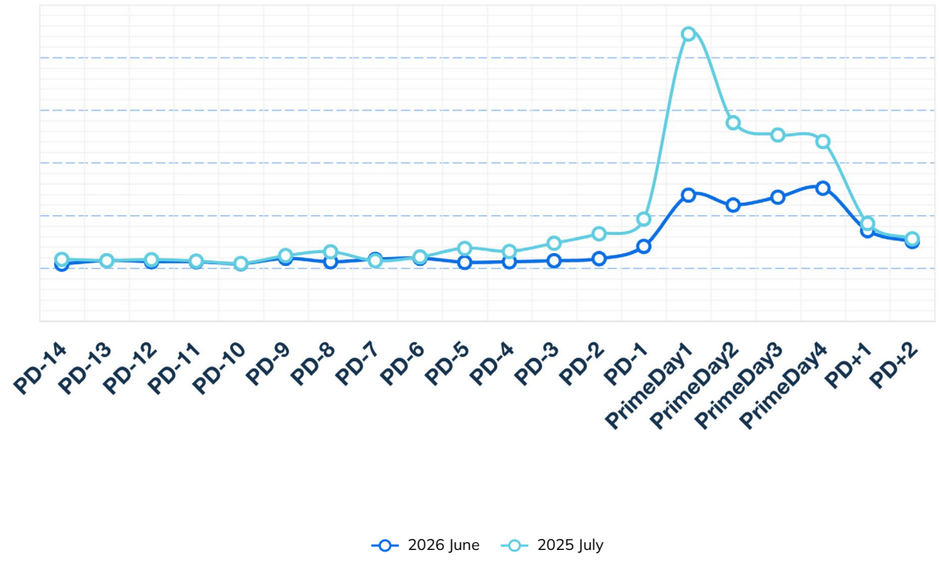
Effective Cost-per-Mille (YoY)

-41.4%

Avg. Daily Spend (YoY)

Amazon Prime Day 2026 saw different budget behavior than last year, as Sponsored Display spend (-56.1% Day 1) declined and was spread more evenly (-3.2% PD+2) YoY.

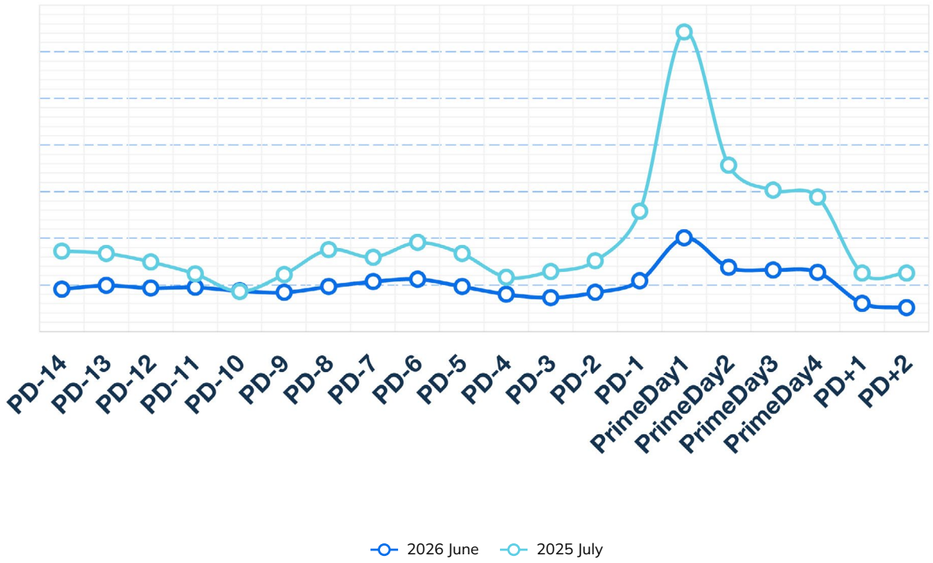
Amazon Prime Day Trends | **Brand Avg. Daily Spend**



Sales & ROAS

Amazon Prime Day Trends • Sponsored Display

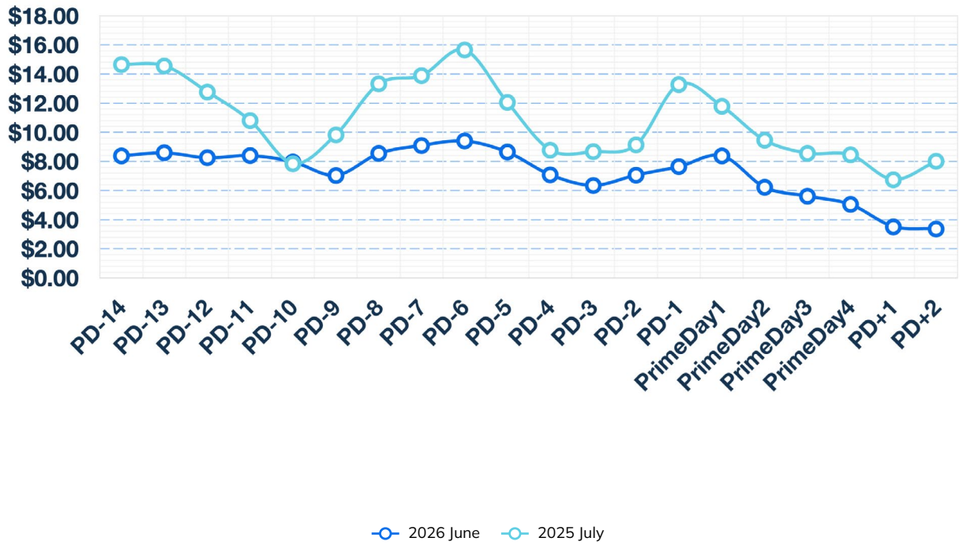
Amazon Prime Day Trends | **Brand Avg. Daily Sales**



-68.71%
Avg. Daily Sales (Day 1 YoY)

-33.9%
Return on Ad Spend (YoY)

Amazon Prime Day Trends | **Return on Ad Spend**



Although Prime Day sales decreased (-62.4% YoY), that decline was partly driven by a steep Day 1 drop (-68.71% YoY), as sales were dispersed more evenly across the 4-day promotional period this year.

Spend

Amazon Prime Day Trends ▪ Sponsored Prompts

While advertisers ramped up their Sponsored Prompts investment for both Sponsored Product and Sponsored Brand placements, they budgeted significantly more for lower-funnel Sponsored Product ads, spending the most on Day 1 and Day 4.

Sponsored Product

+324.2%

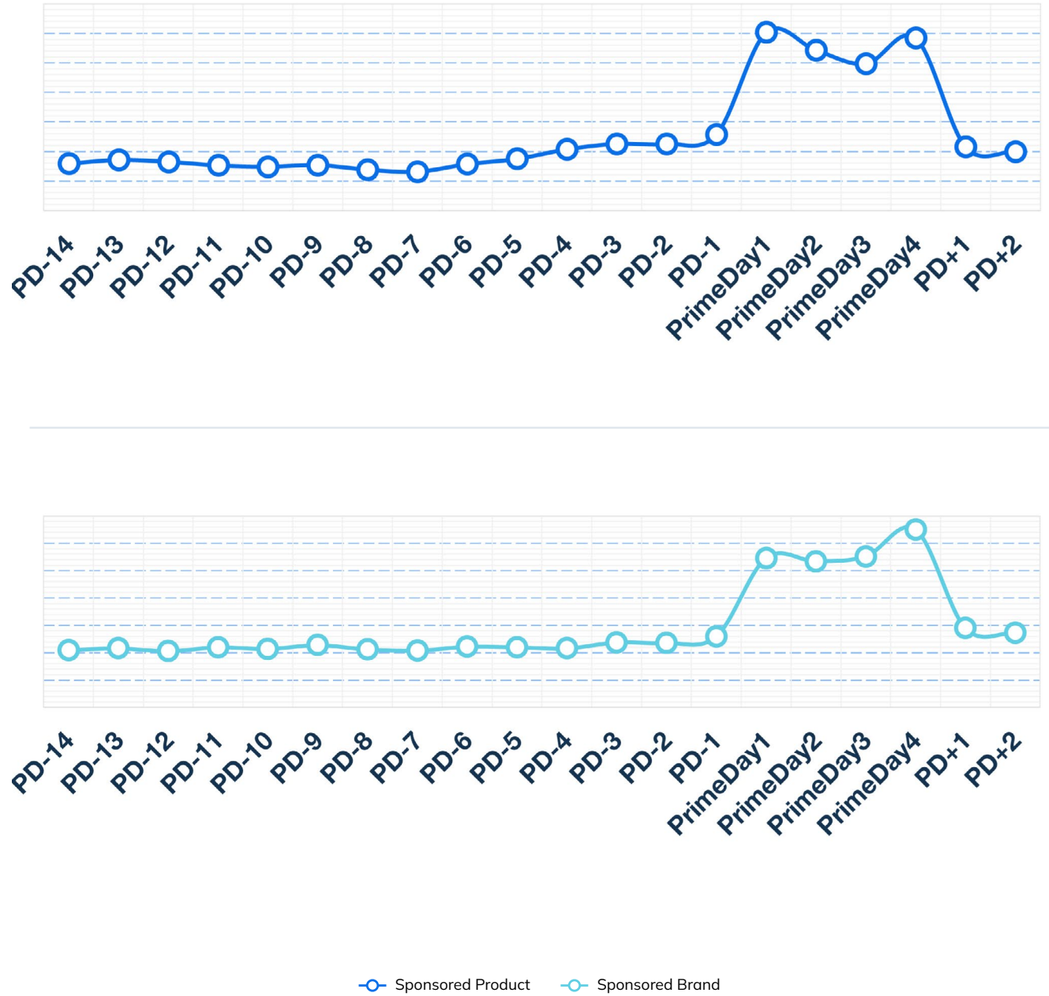
Avg. Daily Spend (WoW)

Sponsored Brand

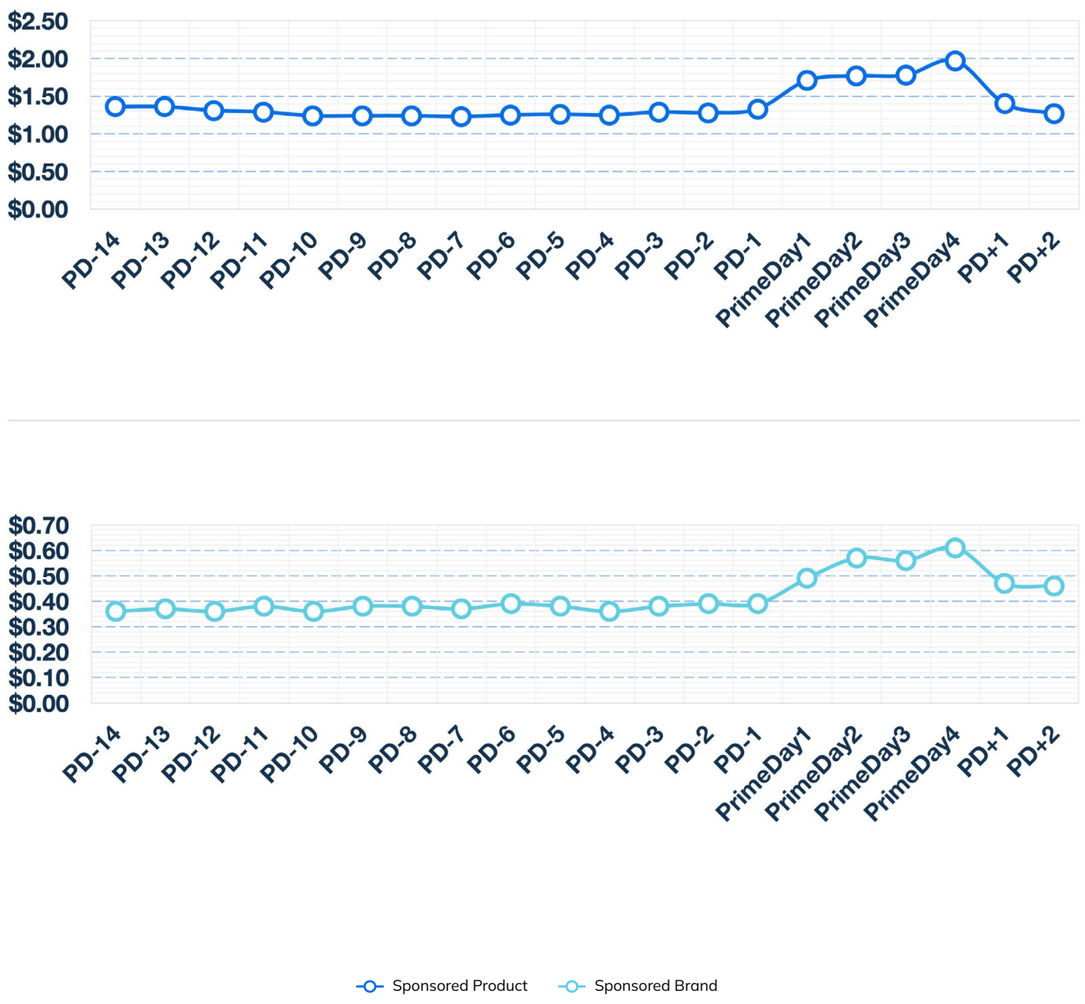
+174.3%

Avg. Daily Spend (WoW)

Amazon Prime Day Trends | **Brand Avg. Daily Spend**



Amazon Prime Day Trends | **Cost-Per-Click**



CPC

Amazon Prime Day Trends ▪ Sponsored Prompts

Auction pressure reached its peak on Day 4 for both ad formats, but Sponsored Product campaigns were significantly more expensive to run, as advertisers fought to win the final stretch with last-minute messaging in conversion-focused placements.

Sponsored Product

$1.97

Cost-per-Click (Day 4)

Sponsored Brand

$0.61

Cost-per-Click (Day 4)

CTR

Amazon Prime Day Trends ▪ Sponsored Prompts

As advertisers raced to promote their Prime Day listings, heavy impression volume reduced click efficiency at scale, with CTR declining DoD and WoW for Sponsored Product and Sponsored Brand placements alike.

Sponsored Product

–52.9%

Click Through Rate (WoW)

Sponsored Brand

–40%

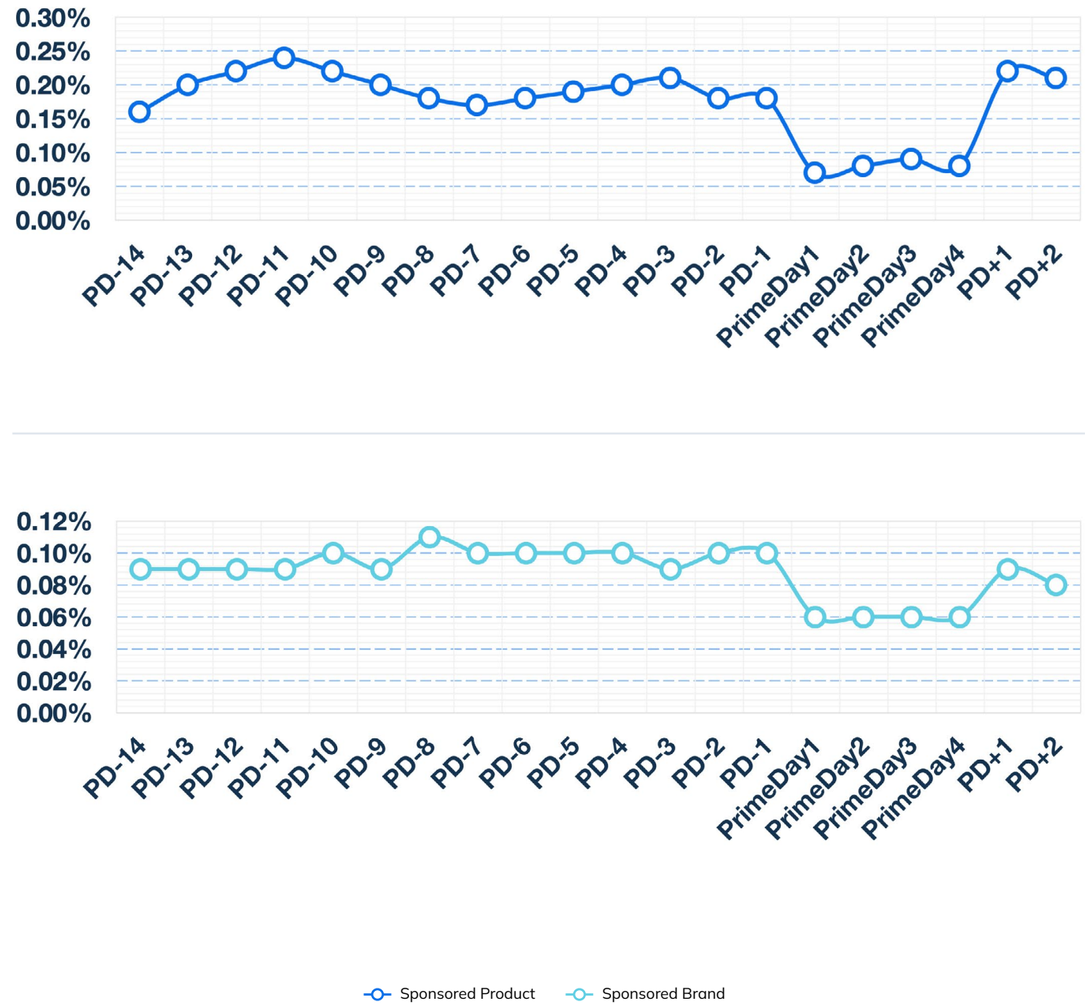
Click Through Rate (WoW)

"The numbers from this Prime Day show a clear shift in how people are shopping. Slower growth points to the reality that economic pressure is squeezing both household budgets and brand margins. With less money going toward discretionary items, the fight for wallet share is tougher than it has been in a long time. You really have to give consumers a compelling reason to spend right now."



Eric Eisner
Senior Manager, Commerce Media, Tinuiti

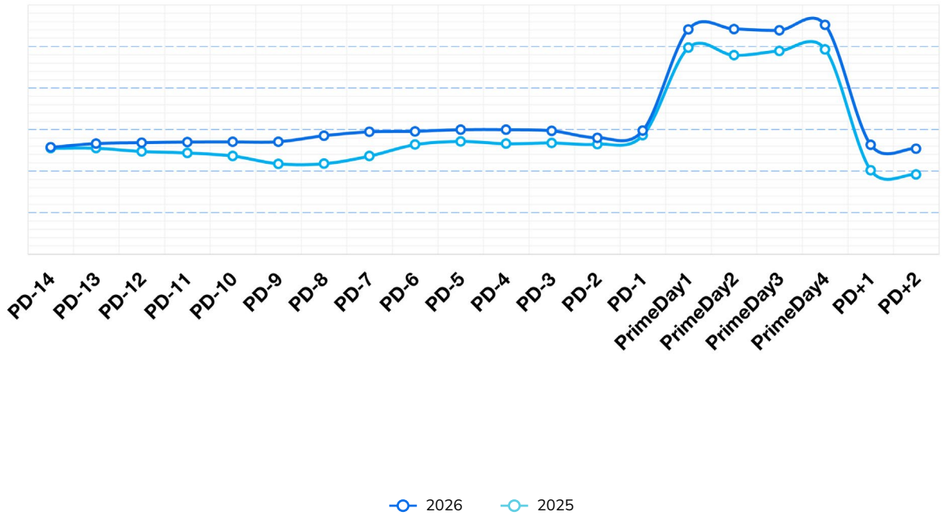
Amazon Prime Day Trends | **Click Through Rate**



Spend & ROAS

Amazon Prime Day Trends • DSP

Amazon Prime Day Trends | **DSP Brand Avg. Daily Spend**



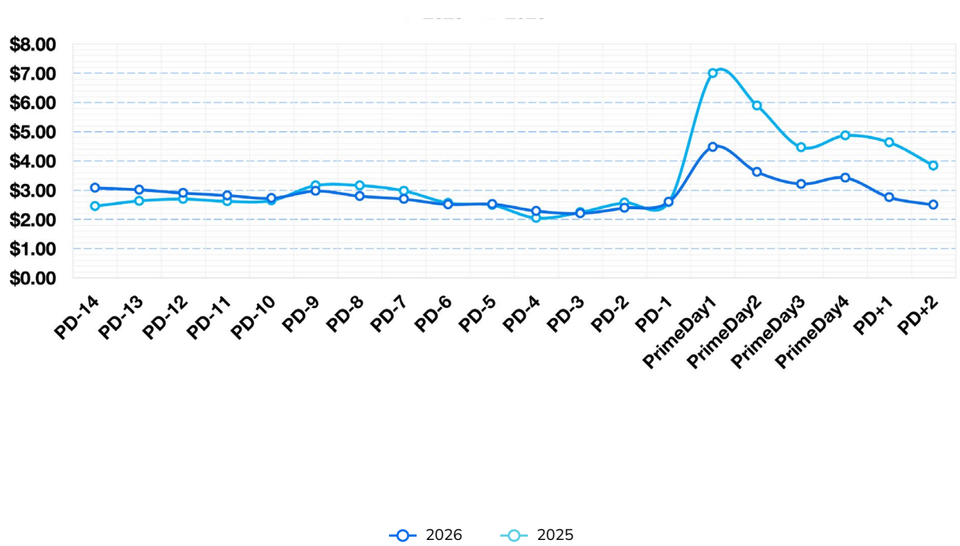
+10.96%

Avg. Daily Spend (YoY)

–33.66%

Return on Ad Spend (YoY)

Amazon Prime Day Trends | **DSP Return on Ad Spend**

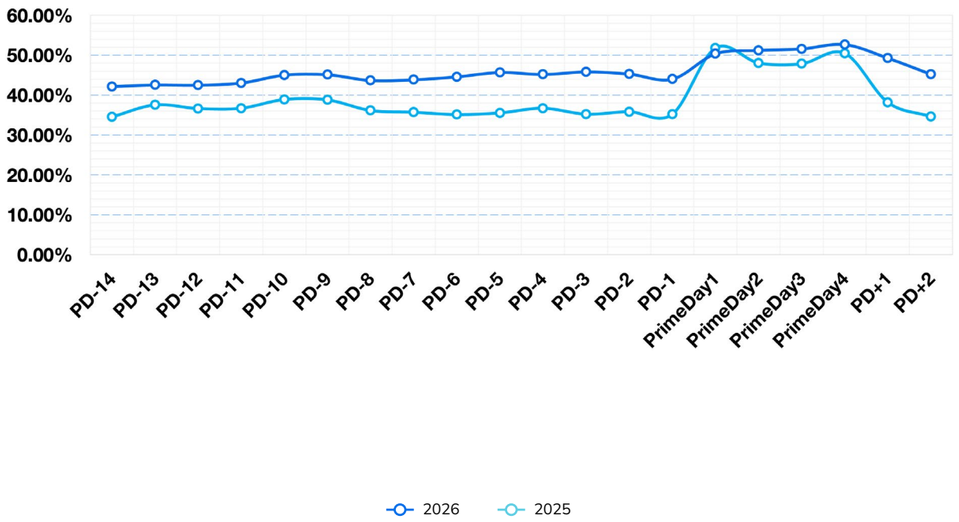


In the two weeks leading up to Prime Day, average daily spend increased +12% YoY and average daily sales grew +14% YoY, while average daily sales during the 4-day event window declined –26% YoY.

NTB Sales & Traffic

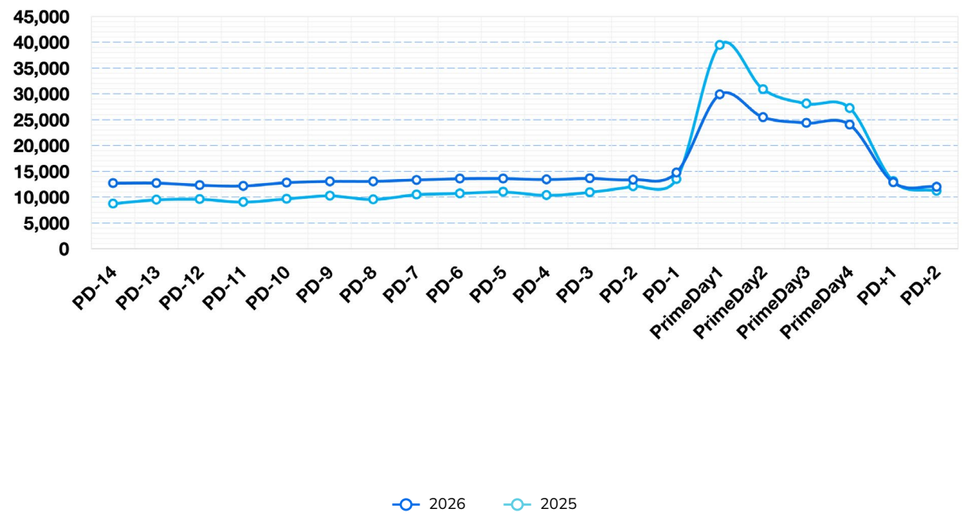
Amazon Prime Day Trends • DSP

Amazon Prime Day Trends | **DSP New-to-Brand Sales**



During Prime Day, New-to-Brand Sales were nearly +20% higher than the week prior, peaking at 52.68% on the final day of the sale.

Amazon Prime Day Trends | **DSP Daily Page View Rate**



+3.87%

New-to-Brand Sales (YoY)

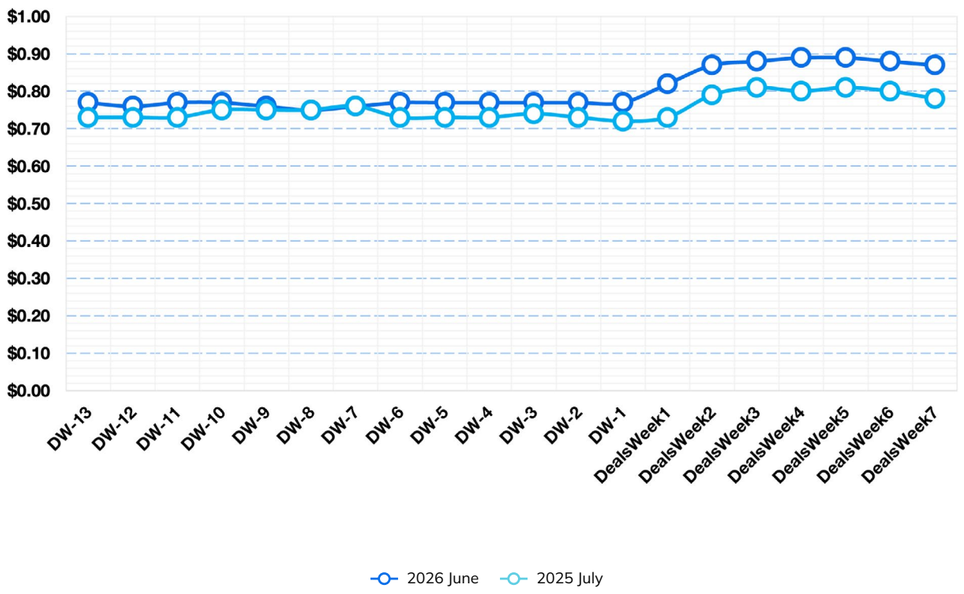
–5.02%

Daily Page View Rate (YoY)

CPC & Spend

Walmart Deals Trends ▪ Sponsored Product

Walmart Deals Trends | **Cost-Per-Click**



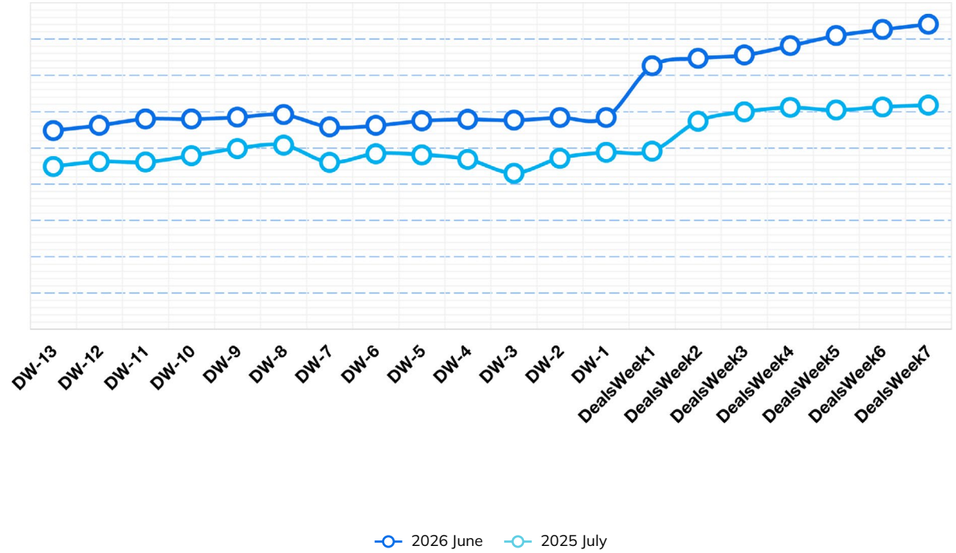
+10.51%

Cost-per-Click (YoY)

+33.48%

Avg. Daily Spend (YoY)

Walmart Deals Trends | **Brand Avg. Daily Spend**

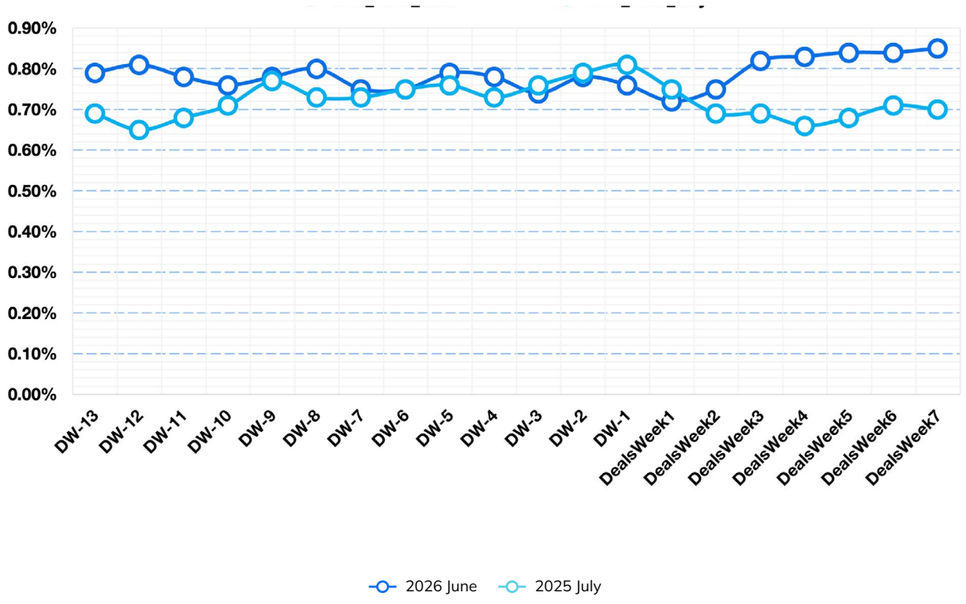


Advertisers leaned into Walmart Deals harder this year, with brand average daily spend climbing more than +30% YoY for Sponsored Products.

CTR & ROAS

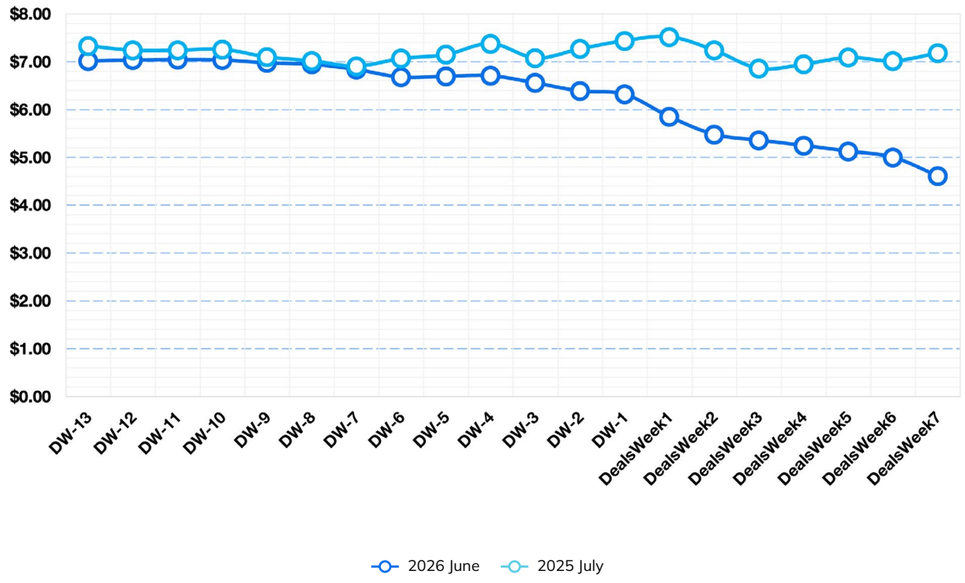
Walmart Deals Trends ▪ Sponsored Product

Walmart Deals Trends | **Click Through Rate**



As advertisers invested more heavily in Sponsored Products, consumer engagement followed suit, with CTR growing nearly +16% YoY.

Walmart Deals Trends | **Return on Ad Spend**



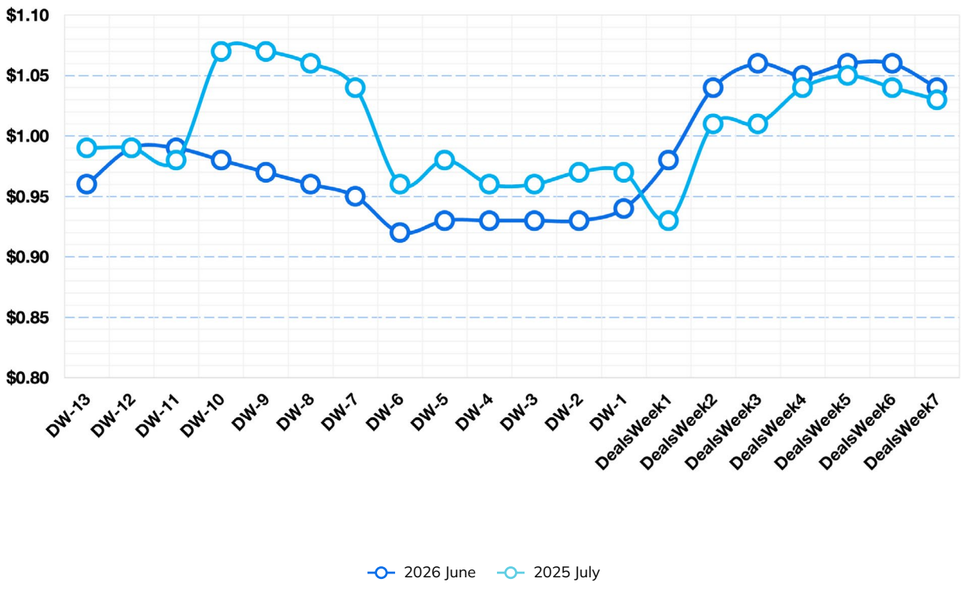
+15.78%
Click Through Rate (YoY)

–26.43%
Return on Ad Spend (YoY)

CPC & Spend

Walmart Deals Trends ▪ Sponsored Brand

Walmart Deals Trends | **Cost-Per-Click**



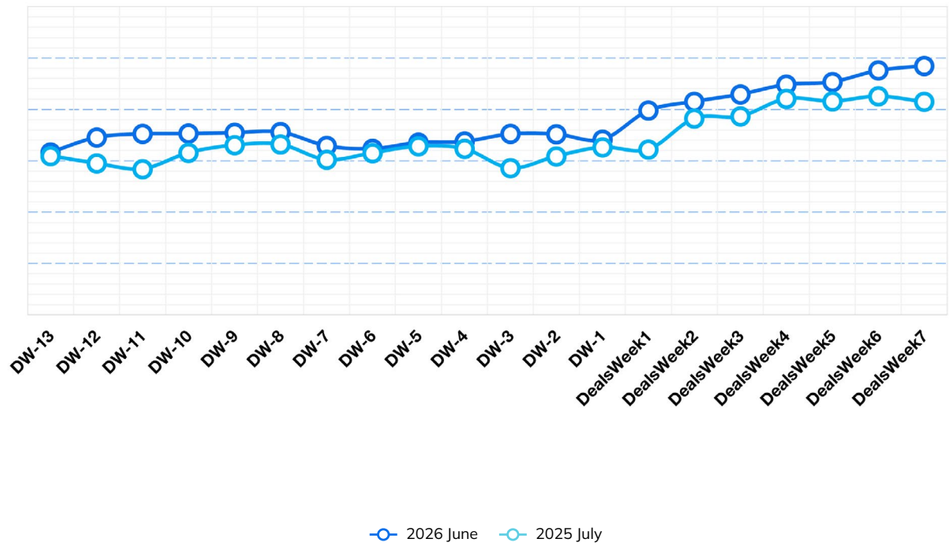
+2.53%

Cost-per-Click (YoY)

+12.17%

Avg. Daily Spend (YoY)

Walmart Deals Trends | **Brand Avg. Daily Spend**

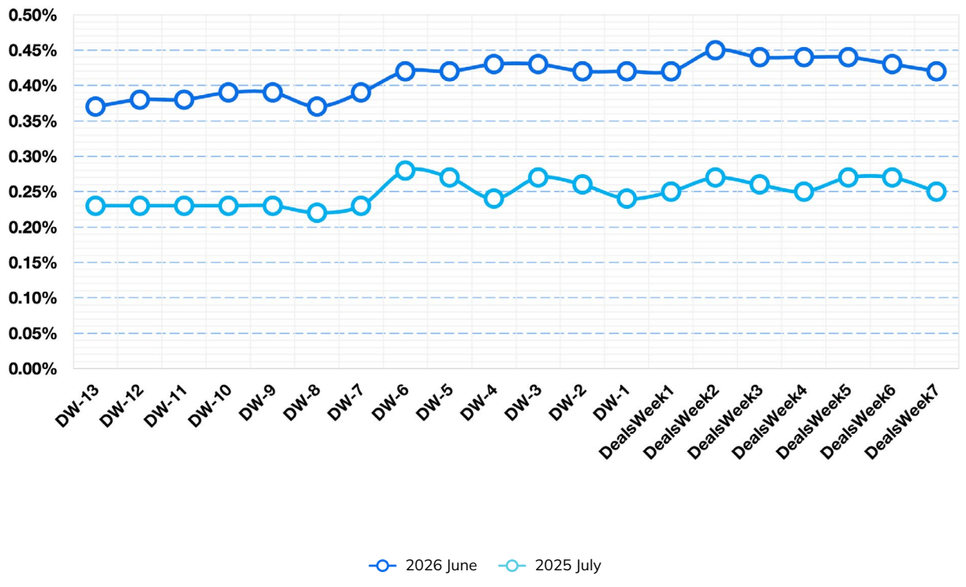


Similar to Sponsored Products, brands invested more heavily in Sponsored Brand ads this year as well, with average daily spend jumping more than +12% YoY.

CTR & ROAS

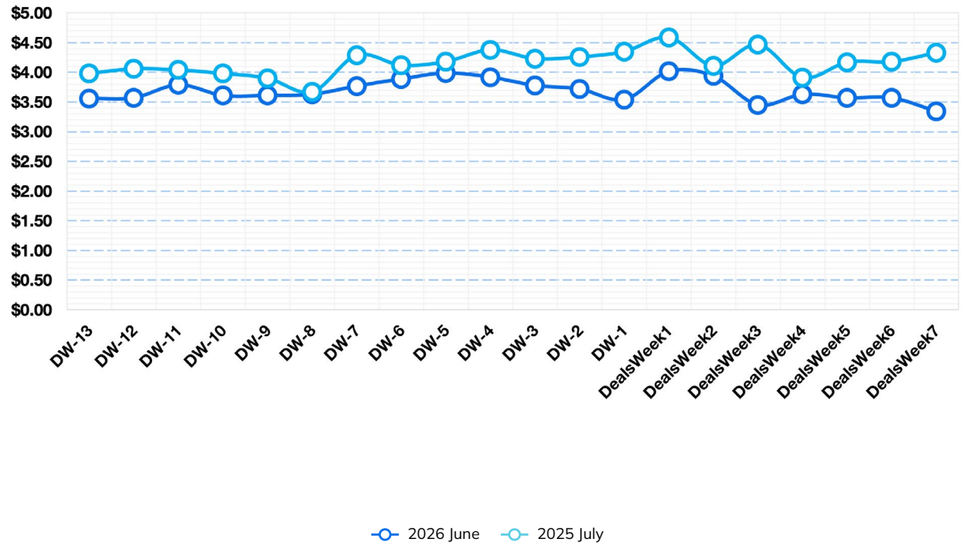
Walmart Deals Trends • Sponsored Brand

Walmart Deals Trends | **Click Through Rate**



Sponsored Brand CTR surged YoY while CPC stayed essentially flat, showing that brands captured significantly more shopper attention efficiently – a sign that upper-funnel, brand-forward creative resonated strongly during the event.

Walmart Deals Trends | **Return on Ad Spend**



+67.03%
Click Through Rate (YoY)

–14.25%
Return on Ad Spend (YoY)

PACVUE | Helium 10

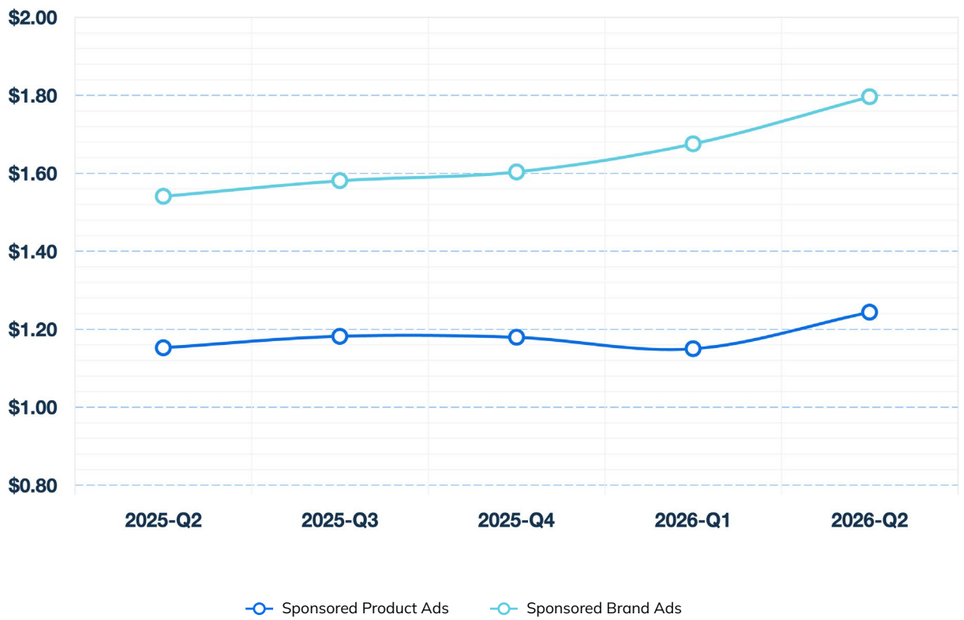
Retailer Tables

Q2 Advertising Trends

CPC & Spend

Retailer KPI Trends ▪ Amazon

Amazon KPI Trends | **Cost-per-Click**



While Sponsored Products campaigns still have the biggest budgets, Sponsored Brand spend is now increasing at a faster rate YoY, as advertisers begin to dedicate more of their advertising dollars to driving brand awareness.

Amazon KPI Trends | **Brand Avg. Daily Spend**

Sponsored Brand

+16.6%

Cost-per-Click (YoY)

Sponsored Brand

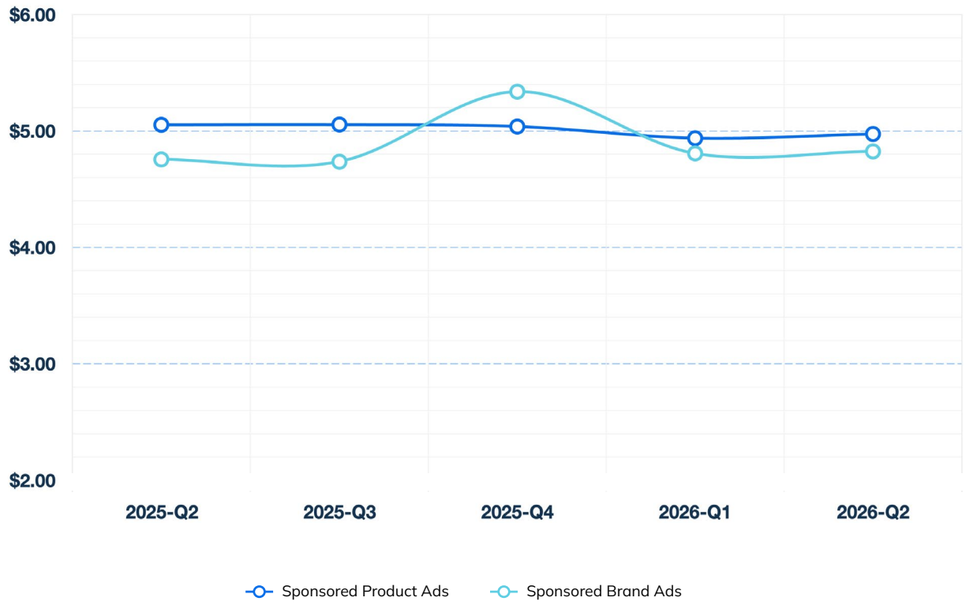
+26.1%

Avg. Daily Spend (YoY)

ROAS & CVR

Retailer KPI Trends ▪ Amazon

Amazon KPI Trends | **Return on Ad Spend**



Over the past two quarters, Sponsored Brand placements converted at a higher rate than Sponsored Products campaigns, with the ROAS disparity between the two formats narrowing to just $0.14 in Q2 2026, as upper-funnel tactics become increasingly necessary to drive modern shoppers to purchase.

Sponsored Brand

+26.5%

Conversion Rate (YoY)

Sponsored Product

+4%

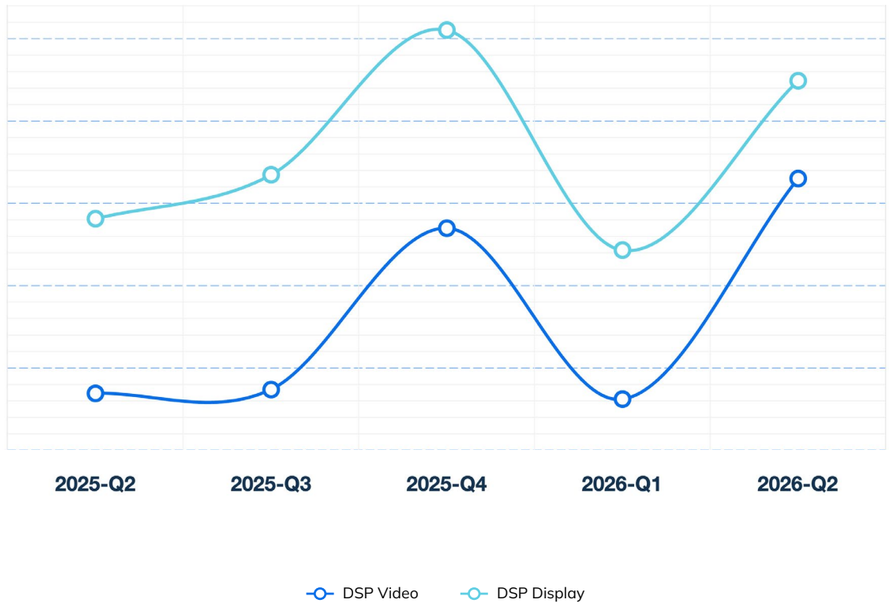
Conversion Rate (YoY)

Amazon KPI Trends | **Conversion Rate**

DSP Spend & ROAS

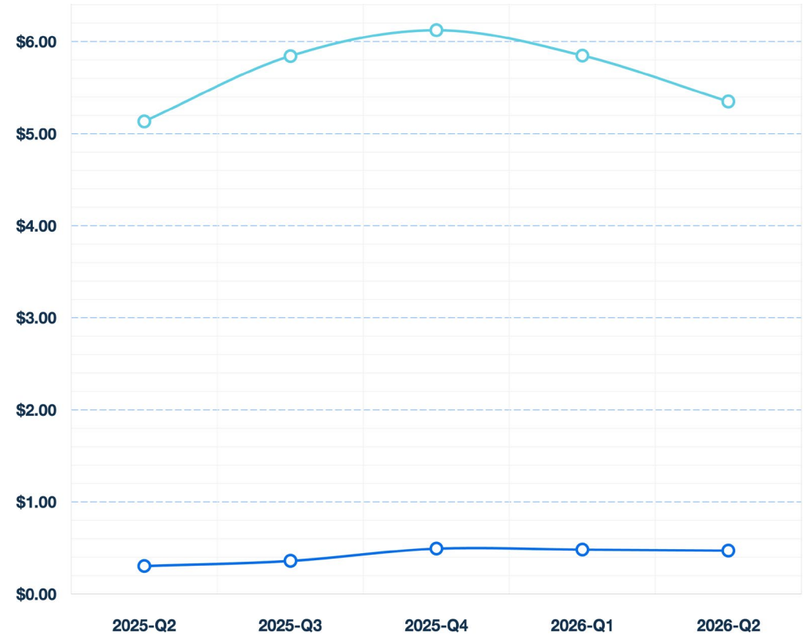
Retailer KPI Trends ▪ Amazon

Amazon KPI Trends | **DSP Brand Avg. Daily Spend**



Amazon DSP continues to attract more investment from advertisers, showing positive ROAS growth YoY (+24.6%) even while ROAS declined QoQ (-8.6%) during the more saturated (and expensive) Prime Day promotional window.

Amazon KPI Trends | **DSP Return on Ad Spend**



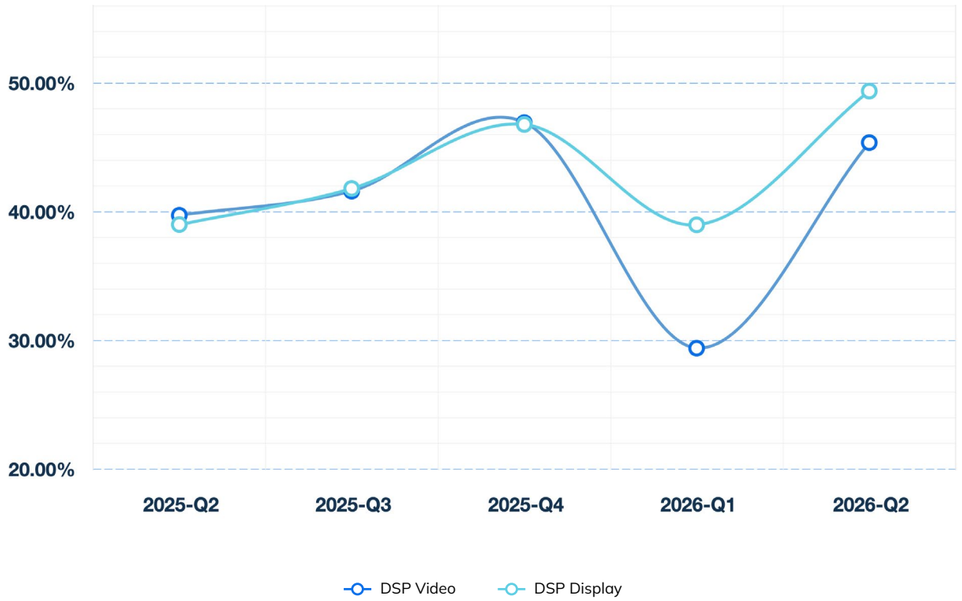
+24.6%
Avg. Daily Spend (YoY)

+4.2%
Return on Ad Spend (YoY)

DSP NTB Sales & Traffic

Retailer KPI Trends ▪ Amazon

Amazon KPI Trends | **DSP New-to-Brand Sales**



+26.6%

New-to-Brand Sales (YoY & QoQ)

+12.1%

Daily Page View Rate (YoY)

Amazon KPI Trends | **DSP Daily Page View Rate**

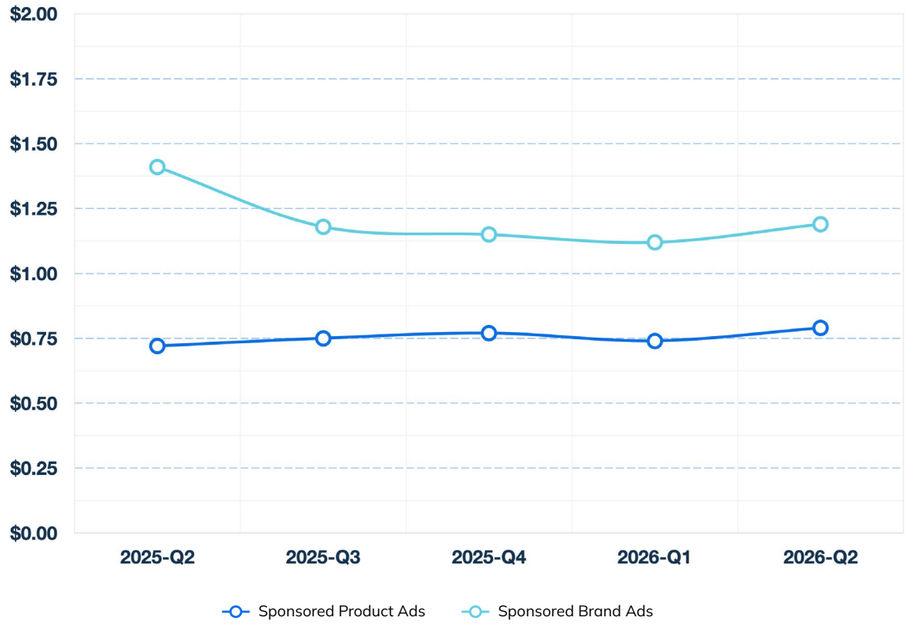


Amazon DSP captured more traffic YoY (+12.1%), while New-to-Brand sales grew by the same percentage (+26.6%) YoY and QoQ, illustrating how effectively the Amazon DSP platform drives customer acquisition.

CPC & Spend

Retailer KPI Trends • Walmart

Walmart KPI Trends | **Cost-per-Click**



Sponsored Brand

+27.8%

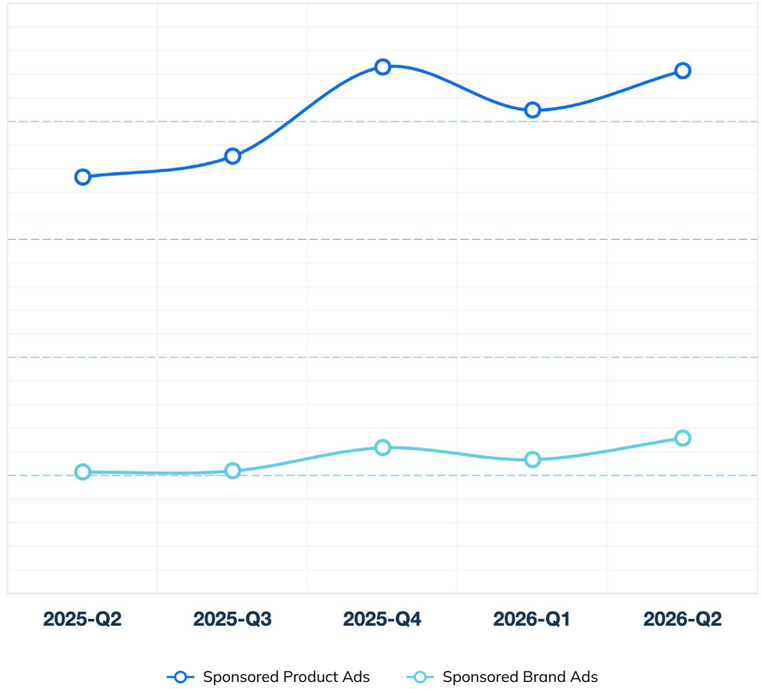
Avg. Daily Spend (YoY)

Sponsored Brand

-15.6%

Cost-per-Click (YoY)

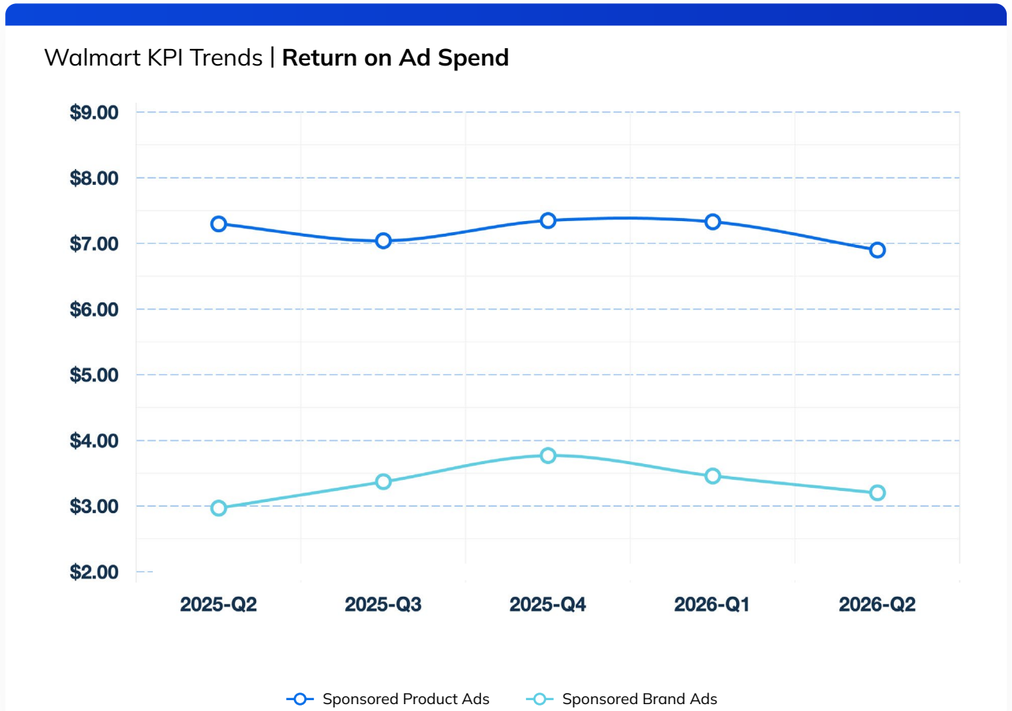
Walmart KPI Trends | **Brand Avg. Daily Spend**



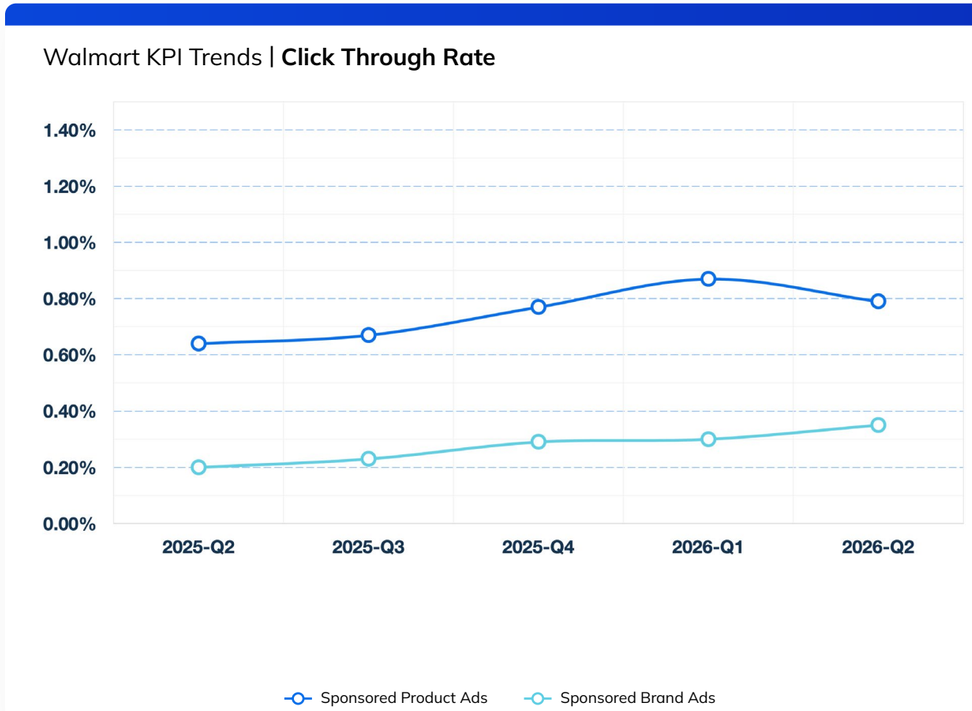
Despite increasing their Sponsored Brand spend (+34.1% YoY), advertisers didn't trigger a bidding war, as CPC fell (-15.6% YoY) to $1.19 in Q2.

ROAS & CTR

Retailer KPI Trends • Walmart



While Sponsored Products continued to deliver the highest ROAS ($6.90 Q2 2026), Sponsored Brand CTR improved noticeably QoQ (+16.7%) and significantly YoY (+75%).



Sponsored Brand

+75%

Click Through Rate (YoY)

Sponsored Product

$6.90

Return on Ad Spend (Q2 2026)



Methodology

About the Report

Explore Pacvue and Helium 10's Prime Day and Beyond: 2026 Mid-Year Commerce Media & Summer Sales Benchmark Report, containing quarterly and yearly advertising trends for Amazon, Walmart, Instacart, and Target. This report analyzes the current state of retail media across the United States, helping you to benchmark your own performance and understand key industry trends.

How We Measure

This report offers a comprehensive view of advertising data based on insights from thousands of advertisers utilizing Pacvue's platform across all product categories, making it one of the most comprehensive reports of its kind.

About Us

PACVUE

Pacvue is the leading Commerce Media OS, powering over $12B in advertising spend across 100+ global retail media networks including Amazon, Walmart, Target, Kroger, Instacart, Criteo, and CitrusAd. Powered by industry-leading AI and real-time data, Pacvue enables over 70,000 brands and agencies to maximize advertising performance, drive incrementality, and expand reach across the commerce universe from a single mission control. As of 2025, Pacvue powers 12% of total retail media ad spend worldwide excluding China. Combined with Helium 10's SMB solutions, Pacvue delivers the industry's most comprehensive platform for businesses of all sizes. Founded in 2018, Pacvue spans Seattle, Los Angeles, Chicago, New York, Washington D.C., London, Shanghai, and Tokyo. Discover more at pacvue.com.

Helium 10

Helium 10 is the operating system behind more than 4.5 million eCommerce brands, giving teams one place to research, list, and advertise across Amazon, Walmart, and TikTok Shop. Backed by a global community of users, Helium 10 powers more than $7B in monthly Amazon GMV, and our MCP connector lets AI agents pull Helium 10 data directly into the tools brands already use, turning insights into action faster. Founded in 2015 by eCommerce operators who lived this problem firsthand, Helium 10 gives brands of every size the data and automation to compete and grow with confidence.

Discover more at helium10.com