2026 Prime Day Insights

FIRST LOOK

A comprehensive look at AI-driven commerce, retail media,
and brand performance across the world's largest ecommerce platforms.

CommerceIQ

EXECUTIVE SUMMARY

Prime Day 2026: demand held as shoppers arrived with sharper intent — conversion surged 17.1% year-over-year even as traffic fell 10.3%, sustaining revenue on fewer visits

Ordered revenue was 121.7% above the pre-event daily average across all four event days, finishing just 1.7% below Prime Day 2025. The near-parity masks a meaningful shift in buyer behavior: glance views fell 10.3% year-over-year, yet unit conversion improved 17.1% and unit volume grew 4.9%, likely due TO Alexa for Shopping recommendations. Shoppers arrived in smaller numbers but with sharper purchase intent demonstrated by fewer visits and more purchases per visit. ASP declined 6.3% year-over-year as deeper promotions and category mix shift compressed blended pricing, the primary reason revenue dipped slightly despite unit growth.

Advertising investment reflected the same efficiency story. Total ad spend fell 8.8% year-over-year while ad-attributed sales declined by a similar proportion, keeping ROAS nearly flat at 4.78× versus 4.73× in Prime Day 2025. Brands consolidated 88% of event spend into Sponsored Products and pulled back sharply on Sponsored Display (-70% YoY) and Sponsored Brand (-25% YoY). Beauty held the most resilient category ROAS at -0.5% vs baseline; Tools & Home Improvement saw the steepest compression at -38.2%.

Key takeaways

01 Revenue held near prior-year despite 10.3% less traffic
The marginal -1.7% YoY revenue dip is pricing and mix, not weakening demand — unit volume grew 4.9% YoY.

02 Conversion rose 17.1% YoY — the standout metric
Shoppers browsed less but bought more on every visit, sustaining demand with fewer impressions.

03 Out-of-stock losses nearly doubled YoY (+185%)
The highest risk to revenue capture; Tools & Home most exposed at +99% vs L14.

04 Ad spend fell 8.8% YoY as brands consolidated into Sponsored Products
Sponsored Products captured 88% of budgets; Display fell 70% and Brand fell 25% year-over-year.

05 CPC held flat YoY (-0.7%) — ROAS improved, not compressed
Beauty ROAS held most resilient (-0.5% vs L14); Tools & Home saw the steepest decline (-38.2%).

06 Promotions deepened — ASP fell 6.3% YoY as discount depth widened
Discount depth rose 16.3% vs baseline; Pet Products (+126%) and Beauty (+59%) ran most aggressively.

Total industry Amazon US overview

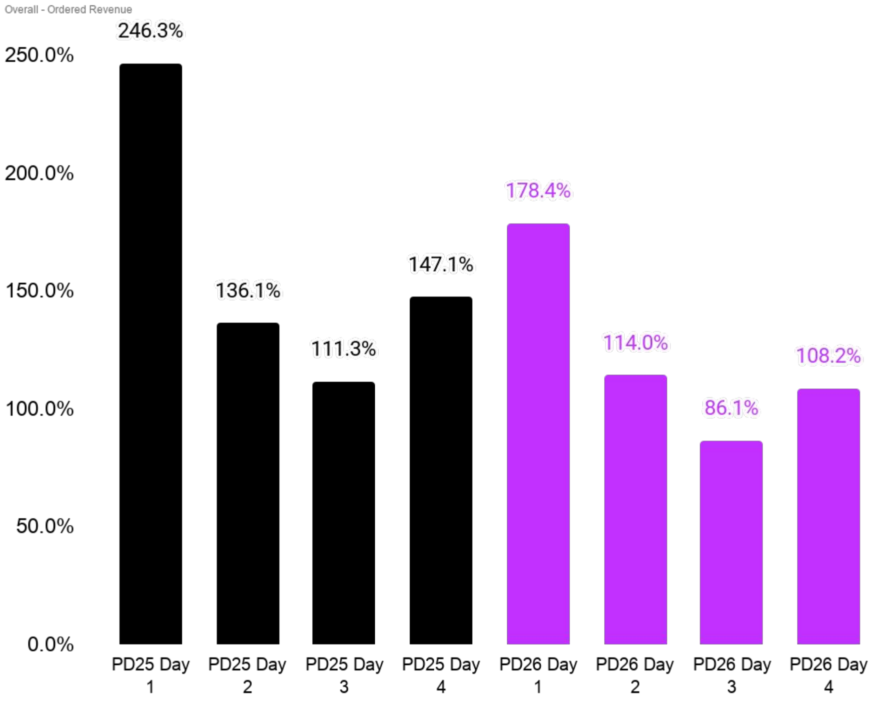
Prime Day 2026

CommerceIQ

Ordered Revenue: Prime Day versus L14 Average - 2026 vs. 2025

Prime Day 2026 ordered revenue jumped 121.7% above the pre-event average

Ordered revenue was 121.7% above the prior 14-day run rate across all four event days. Revenue dipped a marginal 1.7% year-over-year, but unit volume grew 4.9% YoY; the gap reflects pricing and mix, not weakening demand.

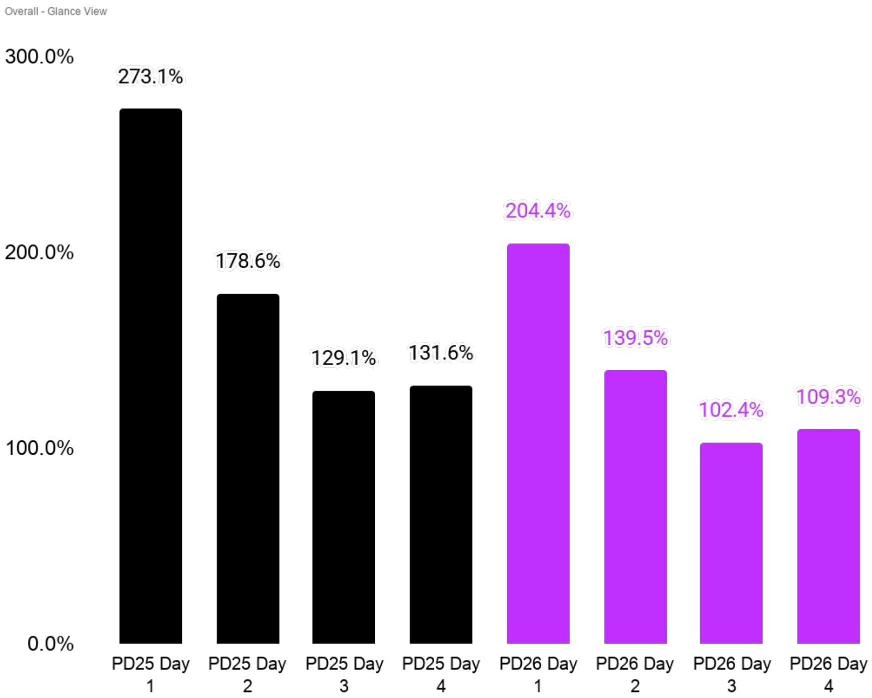


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Glance Views: Prime Day versus L14 Average - 2026 vs. 2025

Traffic surged 138.9% above baseline — with shoppers arriving in higher-intent mode

Glance views climbed 138.9% versus the L14 average during Prime Day 2026. Year-over-year, traffic fell 10.3% — yet unit volume held near prior-year levels, a sign that shoppers required fewer browsing sessions before purchasing.

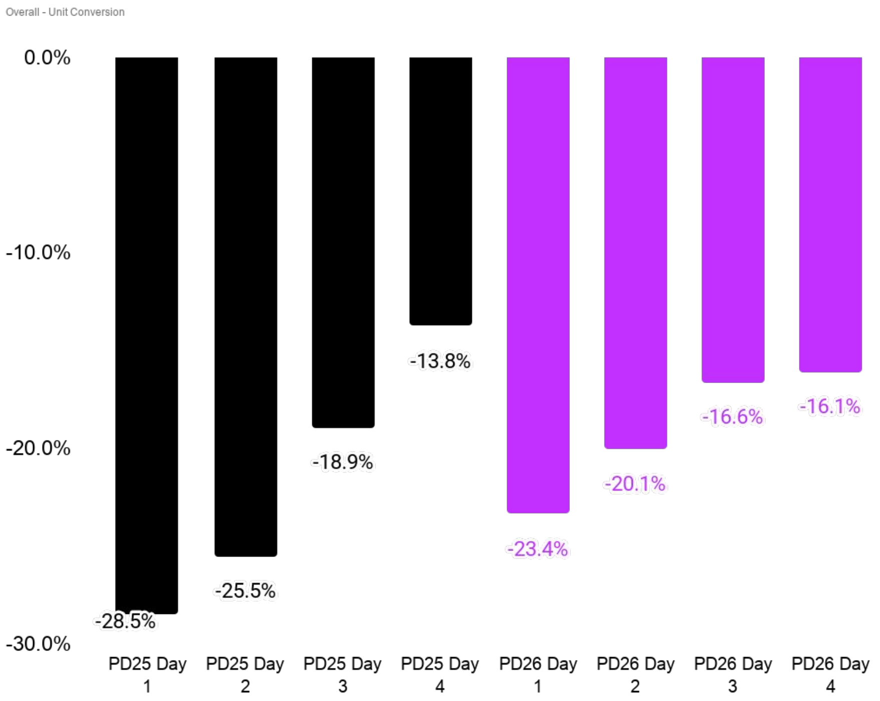


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Unit Conversion: Prime Day versus L14 Average - 2026 vs. 2025

Conversion rose 17.1% year-over-year — shoppers bought more on every visit

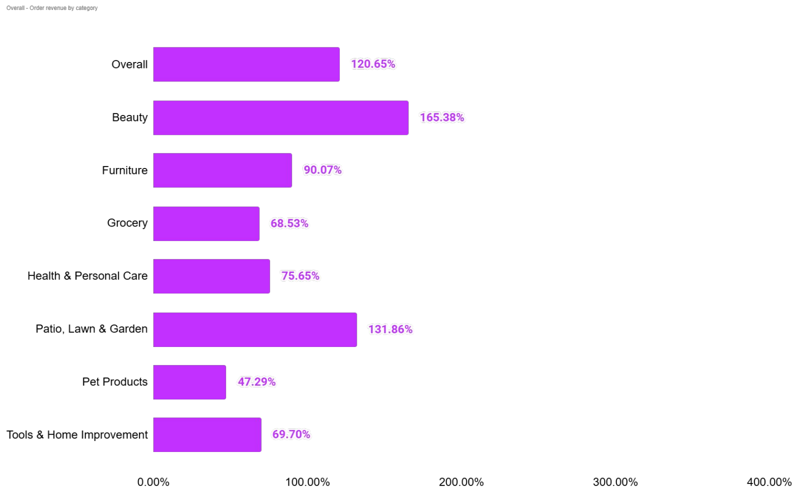
Blended unit conversion reached 20.0% during Prime Day 2026, a 17.1% improvement versus Prime Day 2025. The lift shows that despite lower traffic, purchase intent per visit was significantly stronger — likely due to Alexa for Shopping – sustaining demand even as glance views declined 10.3% year-over-year.



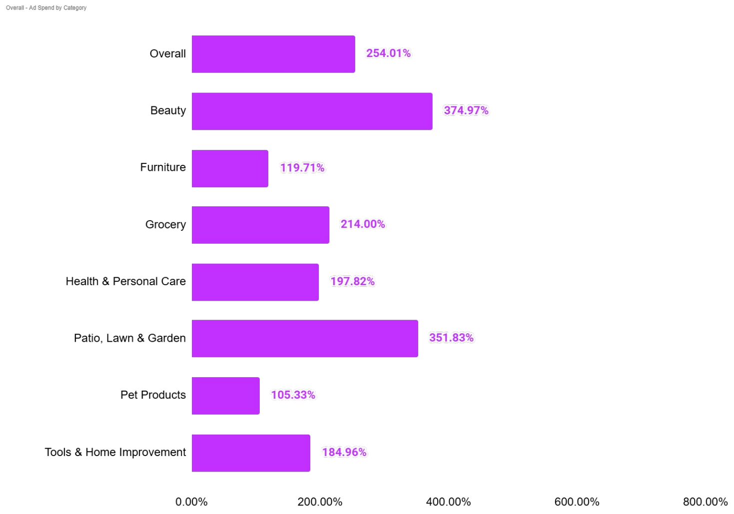
Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Ordered Revenue and Ad Spend by Category

Ordered Revenue by Category: Prime Day 2026 versus L14 Average



Ad Spend by Category: Prime Day 2026 versus L14 Average

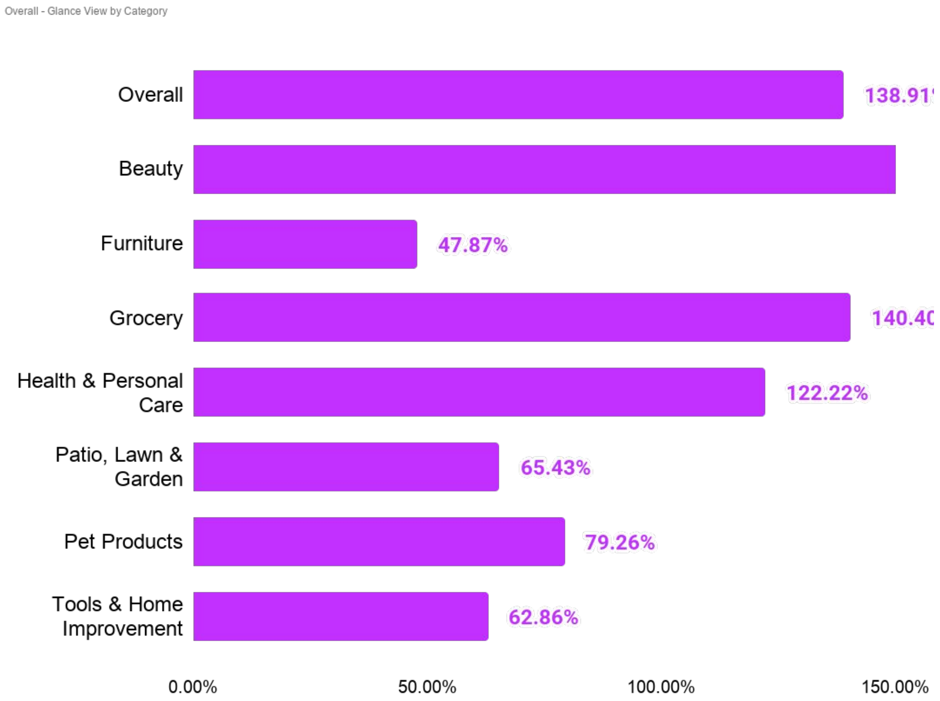


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Glance Views by Category

Beauty led category traffic (+252% vs L14); Furniture lowest at +47.9%

Prime Day 2026 versus L14 Average

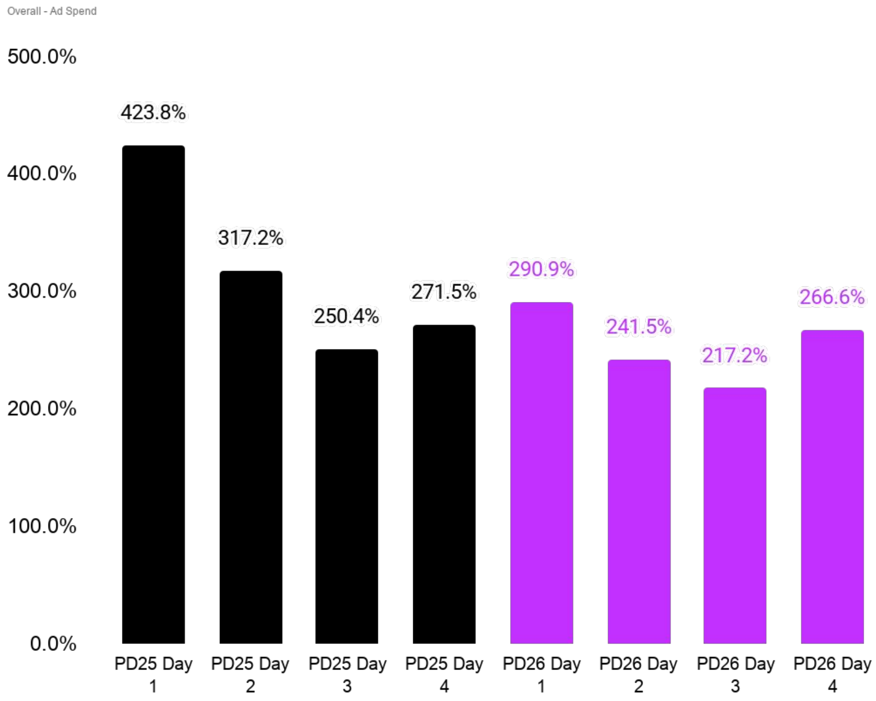


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Ad Spend: Prime Day versus L14 Average - 2026 vs. 2025

Ad spend rose 254% above the pre-event baseline — down 8.8% year-over-year

Ad spend was 254% above the L14 daily run rate across four event days. Spend efficiency held steady: outlay fell 8.8% year-over-year while ad-attributed sales declined by the same proportion, keeping ROAS nearly flat versus Prime Day 2025.

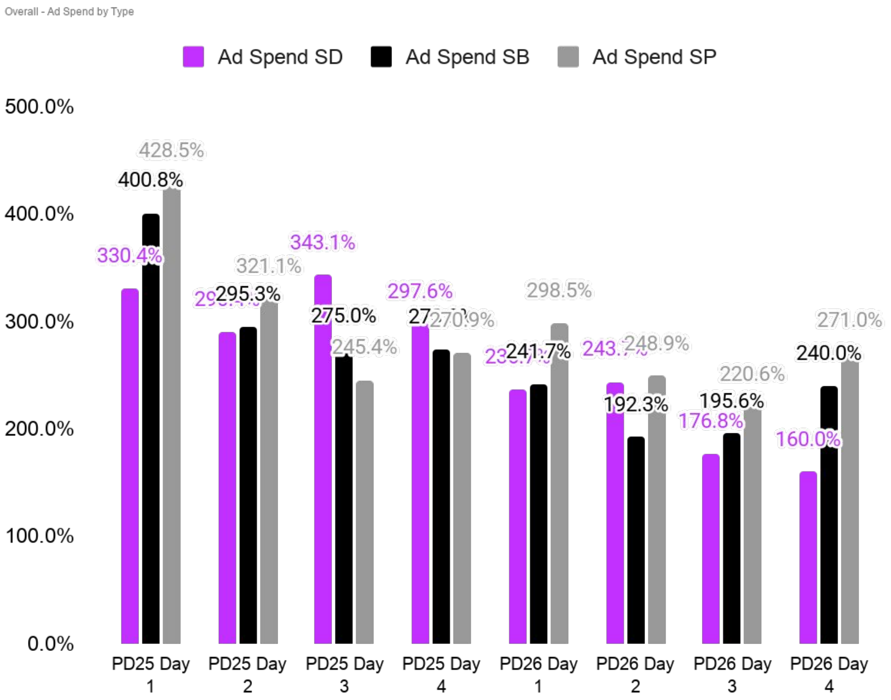


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Ad Spend by Type: Prime Day versus L14 Average - 2026 vs. 2025

Sponsored Products drove 88% of event ad spend — Display and Brand both declined YoY

Media investment consolidated sharply into Sponsored Products (+260% vs L14) as brands prioritized performance-driven formats. Sponsored Display fell 70% year-over-year and Sponsored Brand declined 25%, signaling a structural shift toward lower-funnel spend.

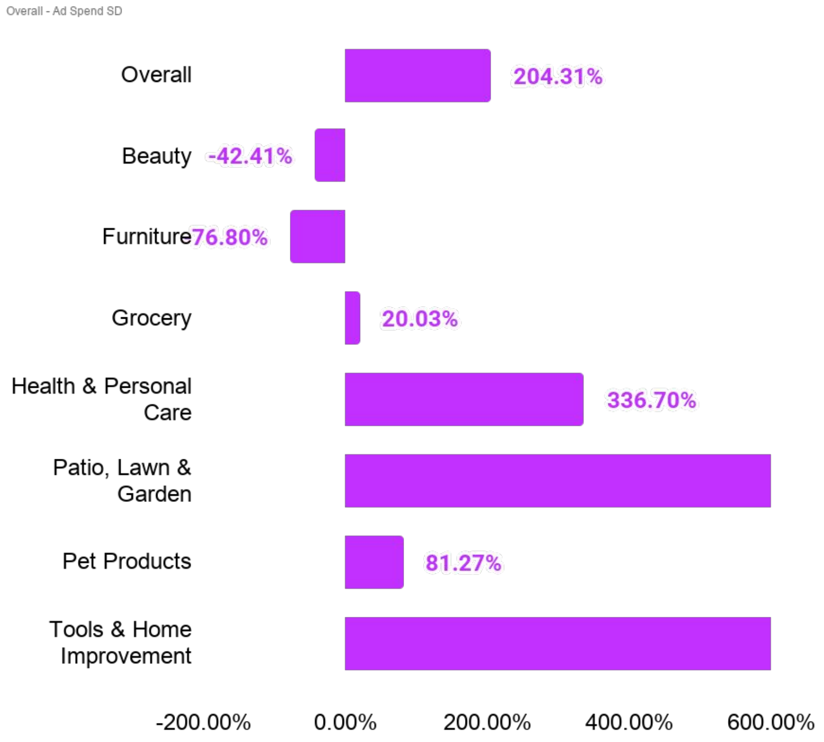


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Sponsored Display: Prime Day versus L14 Average - 2026 vs. 2025

Sponsored Display spend up 204% vs baseline — but down 70% year-over-year

Brands activated Sponsored Display for event awareness, spending 204% above the L14 average. The format saw the steepest year-over-year decline of any ad type (-70%), reflecting a clear reallocation toward Sponsored Products and direct-response formats.

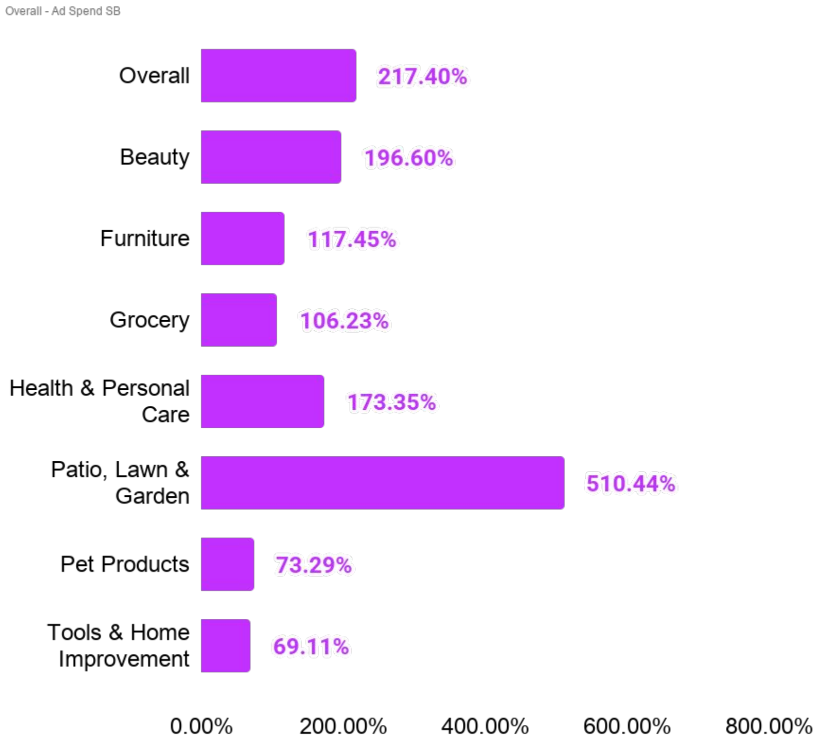


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Sponsored Brand: Prime Day versus L14 Average - 2026 vs. 2025

Sponsored Brand spend up 217% vs baseline — down 25% year-over-year

Sponsored Brand investment rose 217% above the L14 run rate as brands competed for premium placements. Year-over-year spend declined 25% — consistent with the broader shift of media budgets toward higher-ROI Sponsored Product formats.

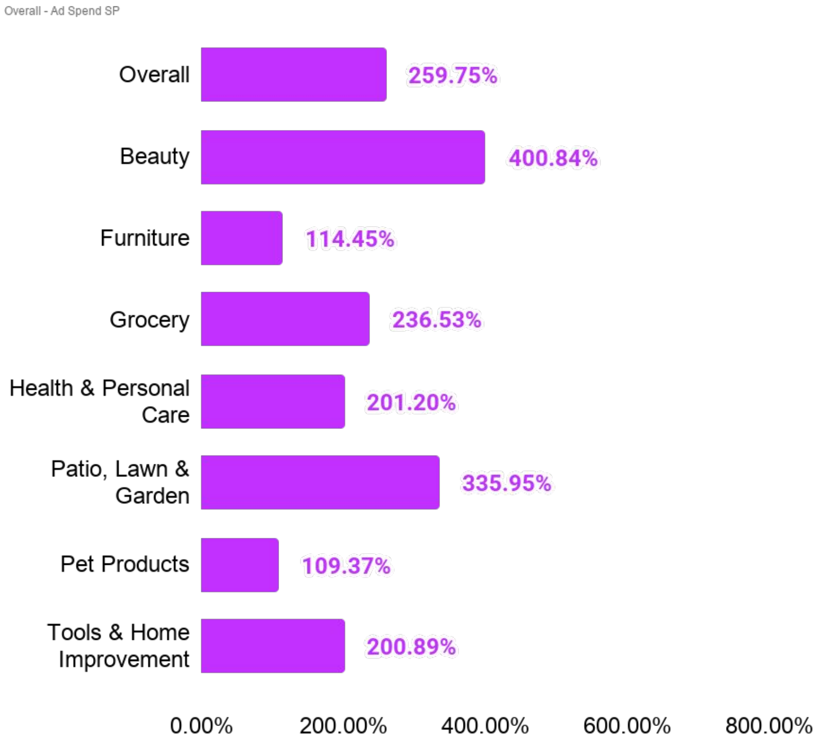


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Sponsored Product: Prime Day versus L14 Average - 2026 vs. 2025

Sponsored Products: up 260% vs baseline, the dominant format at 88% of all event ad spend

Accounting for 88% of total event ad spend, Sponsored Products remained the dominant format — up 260% versus the L14 average. The year-over-year decline was modest at -5.6%, showing brands protected SP investment even while cutting other formats.

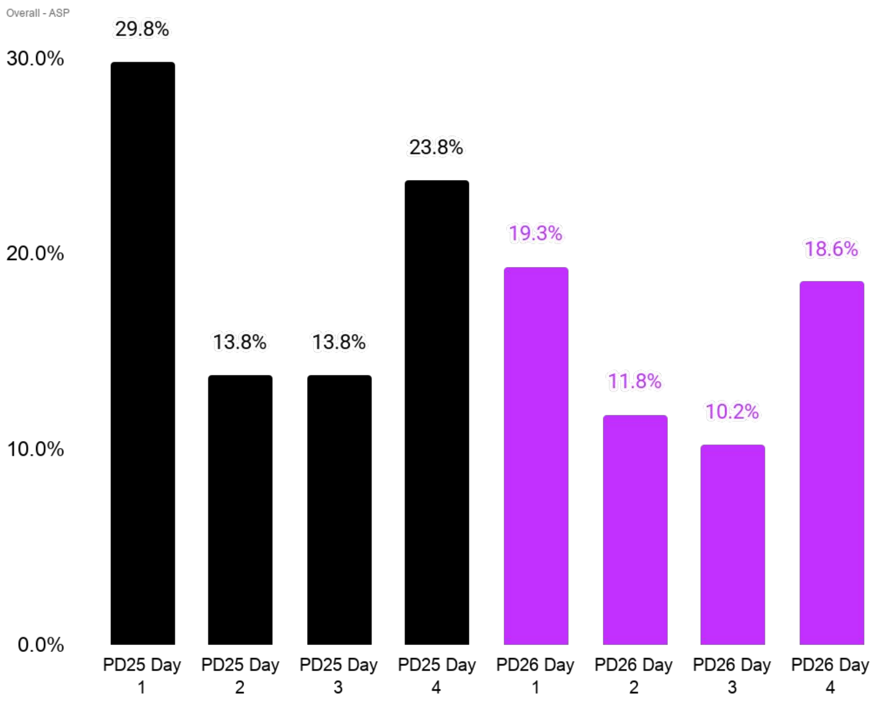


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

ASP: Prime Day versus L14 Average - 2026 vs. 2025

Average selling price up 15.3% vs baseline — down 6.3% YoY on deeper promos

Average selling price was 15.3% above the L14 average during the event. Year-over-year ASP fell 6.3% as deeper promotional discounts and category mix — particularly Grocery's strong performance — compressed blended pricing.

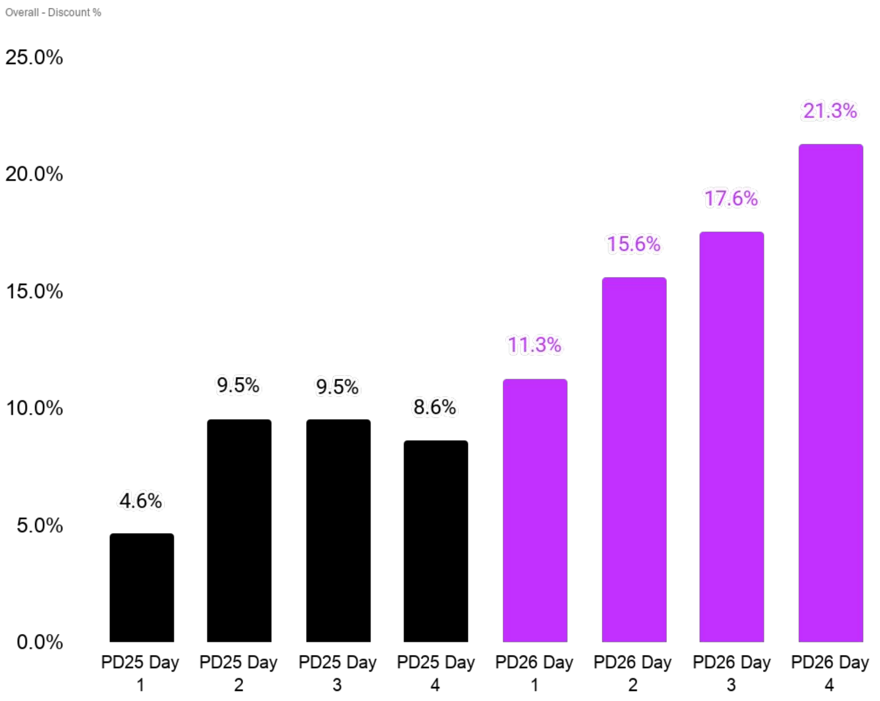


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Discount %: Prime Day versus L14 Average - 2026 vs. 2025

Promotional depth up 16.3% vs baseline — Pet Products deepest at +126%

Brands offered an average 18.5% discount across the event, 16.3% deeper than the L14 run rate. Pet Products ran the most aggressive promotions (+126% vs L14), followed by Beauty (+59%). Furniture was most restrained at +10.3%.

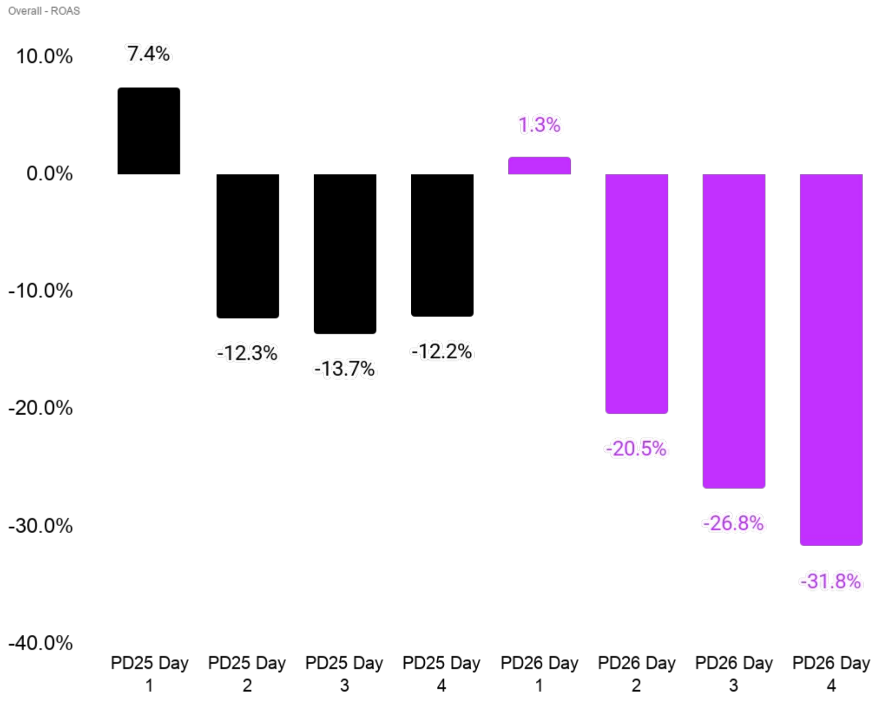


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

ROAS: Prime Day versus L14 Average - 2026 vs. 2025

Event ROAS down 18.8% vs baseline as CPC inflation outpaced ad sales growth

Ad spend efficiency declined as CPC inflation (+37.3% vs L14) outpaced ad sales growth. Despite compression versus the pre-event baseline, ROAS held nearly flat year-over-year, indicating brands calibrated spend discipline closely to prior-year performance.

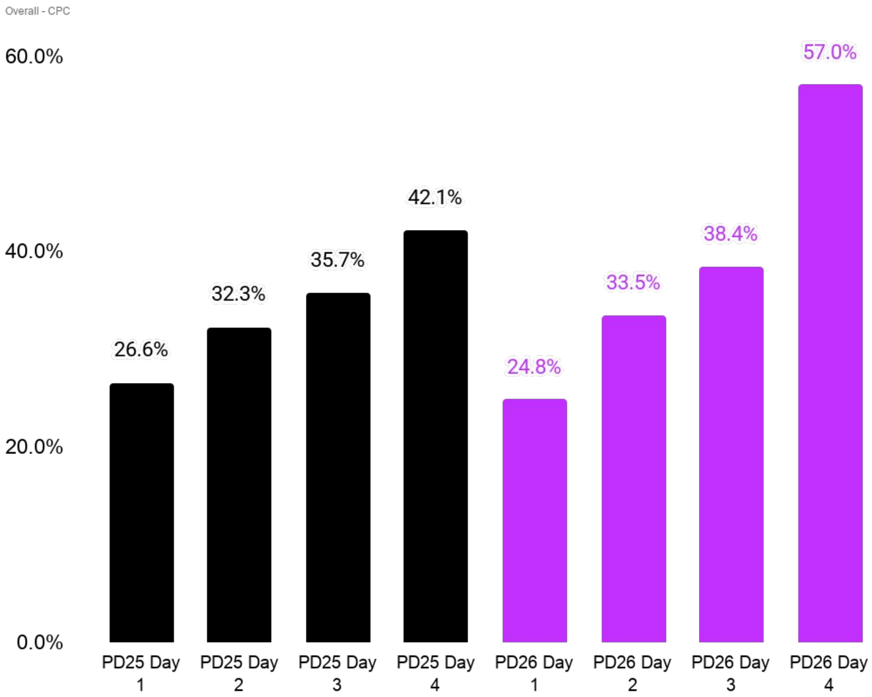


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

CPC: Prime Day versus L14 Average - 2026 vs. 2025

Cost per click up 37.3% as Prime Day auction competition intensified

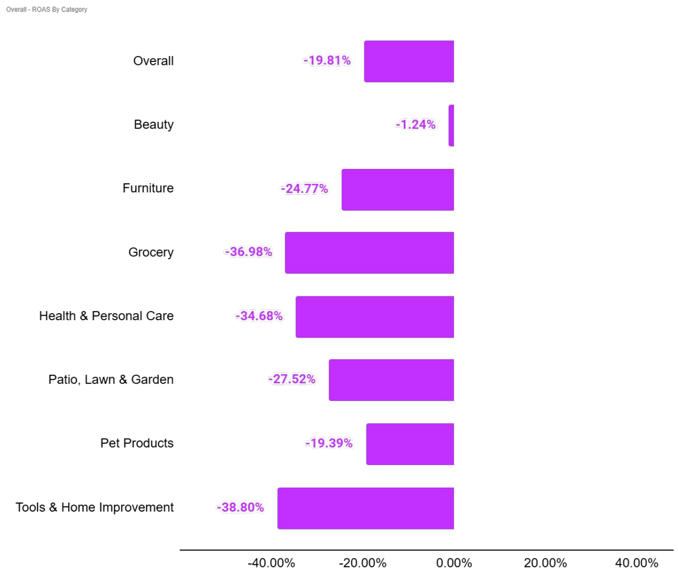
Cost per click rose 37.3% versus the L14 average and was roughly flat year-over-year (-0.7%) versus Prime Day 2025. Beauty saw the sharpest spike (+97% vs L14), reflecting heightened competition for high-converting placements in a category that also led ad sales growth (+372% vs L14).



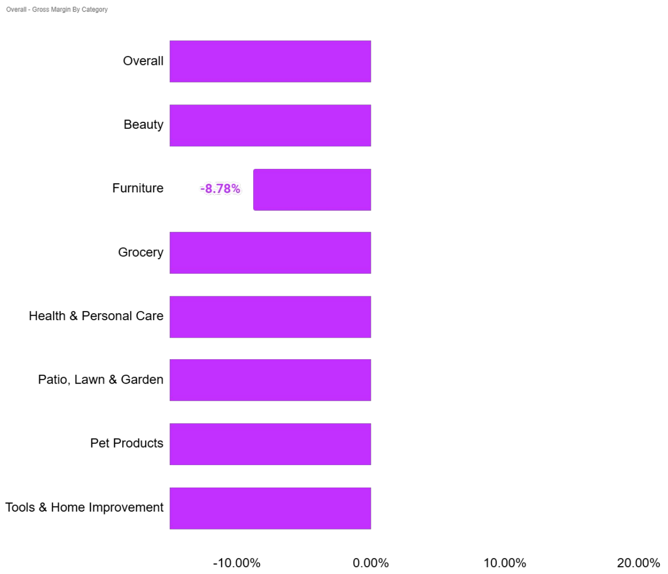
Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

ROAS & Gross Margins by Category

Beauty held ROAS best (-0.5% vs L14); Tools & Home deepest compression (-38.2%)



Gross margins turned negative in-event across most categories — Furniture the standout exception with margins intact



Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Total industry Amazon EU overview

Prime Day 2026

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EXECUTIVE SUMMARY

Prime Day 2026 EU: revenue accelerated 20% year-over-year as traffic and conversion both expanded — broad demand growth, not just efficiency gains

Ordered revenue rose 20.3% above Prime Day 2025 and reached 318.1% above the pre-event baseline across all four event days. EU Prime Day 2026 saw glance views grow 11.5% year-over-year while unit conversion improved 6.1%. Both signals compounded into broad demand expansion — units grew ahead of revenue as ASP held nearly flat at +1.7% year-over-year.

Advertising efficiency diverged from revenue performance. Brands reduced total ad investment by 18.9% year-over-year even as revenue grew 20.3%, consolidating 84% of event spend into Sponsored Products and near-eliminating Sponsored Display. CPC inflation was contained at just 2% year-over-year, though ROAS compressed 6.8% as event-period auction costs ran 49.6% above the pre-event run rate.

Key takeaways

01 Revenue grew 20.3% year-over-year — traffic expansion and conversion gains both contributed

Both glance views (+11.5% YoY) and conversion (+6.1% YoY) improved, with ASP holding nearly flat at +1.7% — demand grew on all three dimensions.

02 Conversion improved 6.1% year-over-year — buyer quality strengthened even as visitor volume grew

Conversion gains arrived alongside higher traffic, not instead of it — a signal of genuine demand expansion, not just efficiency improvement.

03 Ad spend cut 18.9% year-over-year while revenue rose — Sponsored Products captured 84% of all event investment

Sponsored Display was near-eliminated at just 0.1% of event spend; Sponsored Brand held at 16%, growing modestly +5.6% year-over-year.

04 CPC inflation contained at just 2% year-over-year — EU auction competition remained measured

Despite a 49.6% CPC premium versus baseline, year-over-year bid inflation was negligible — ROAS compression was driven by the event premium, not escalating competition.

05 Discount depth rose just 3.4% year-over-year despite 20.3% revenue growth

ASP held nearly flat at +1.7% YoY — brands drove growth through demand, not deeper promotions.

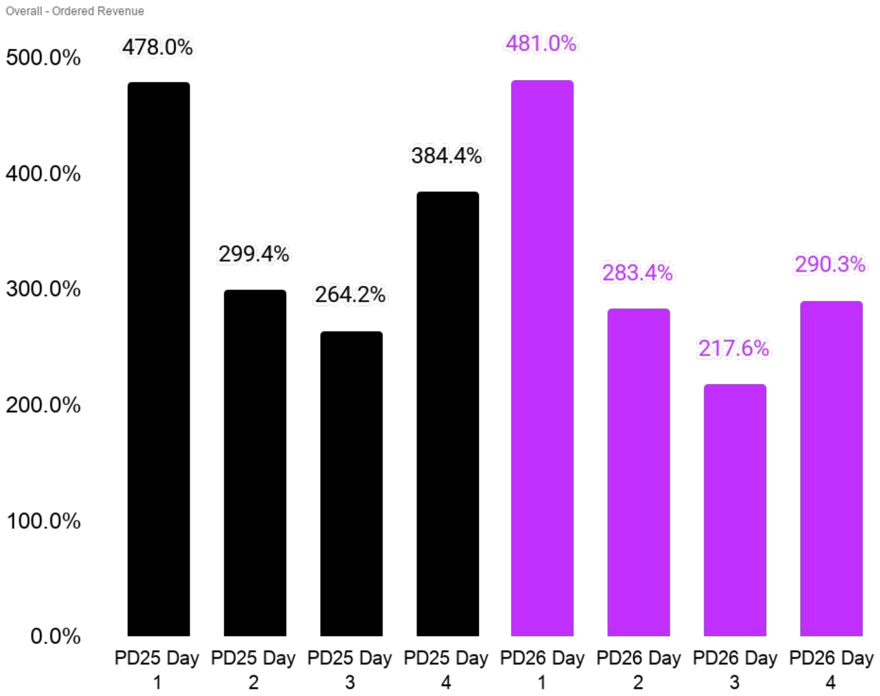
06 ROAS held at a healthy 2.76× even after compression — the event stayed profitable at scale

The compression traces to the event-period CPC premium, not a genuine efficiency decline, since CPC rose just 2.0% year-over-year.

Ordered Revenue

Prime Day 2026 EU ordered revenue rose 20.3% year-over-year — both more visitors and better conversion compounded into broad demand growth

Ordered revenue reached 318.1% above the pre-event daily average across all four Prime Day event days. Growth was not efficiency-driven alone — year-over-year, glance views expanded 11.5% while unit conversion improved 6.1%, and ASP held nearly flat at +1.7%. The three drivers compounded: more shoppers arrived, each more likely to buy, at stable pricing.



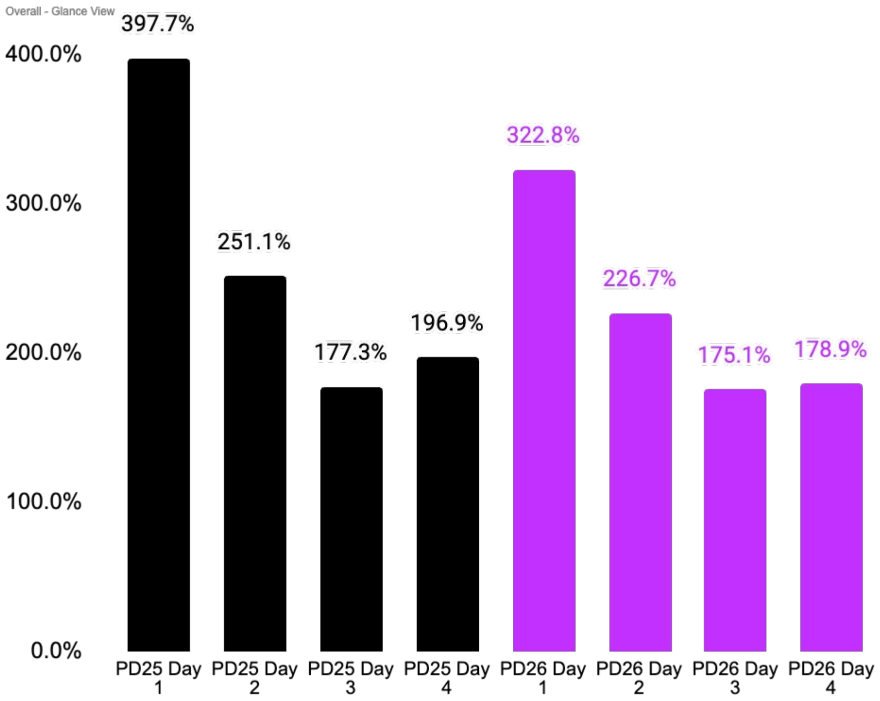
Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Glance Views

Glance views surged 225.9% above the pre-event baseline — and year-over-year traffic grew 11.5%, expanding Prime Day's reach across EU

Glance views climbed 225.9% above the prior 14-day daily average during Prime Day 2026, reflecting broad shopper mobilization across all four event days. Year-over-year, traffic grew 11.5% above Prime Day 2025 — demonstrating expanding event participation and reach rather than a consolidation of intent into a smaller but more efficient visitor pool.

Despite the traffic increase, blended conversion fell 21.0% versus the L14 baseline — the standard pattern when event promotion draws a higher proportion of browse-oriented shoppers alongside high-intent buyers. The relevant comparison is year-over-year: Prime Day 2026 attracted both more visitors than Prime Day 2025 and converted them at a higher rate (+6.1%), meaning browse volume grew alongside buyer quality.



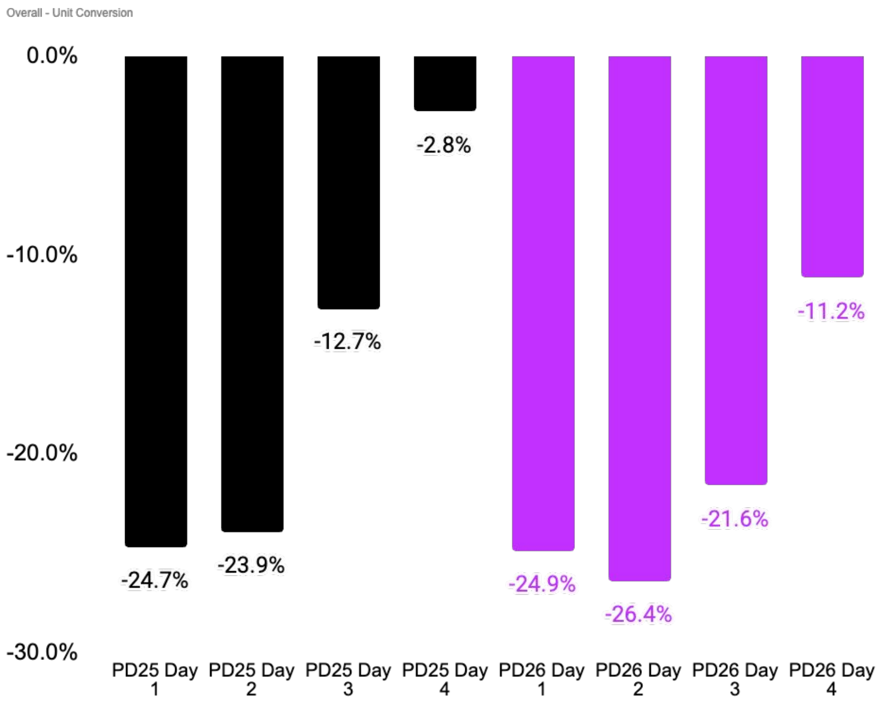
Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Unit Conversion

Unit conversion improved 6.1% year-over-year on a traffic base that also grew 11.5% — buyer intent strengthened as the event drew more visitors

Blended unit conversion improved 6.1% year-over-year on a traffic base that also expanded 11.5%. When both metrics rise simultaneously, revenue growth reflects genuine demand expansion — not a pull-forward of existing intent or a trade-off between reach and efficiency. More shoppers arrived at the event and a larger share of them purchased, producing a stronger demand signal than either metric would indicate in isolation.

Versus the pre-event baseline, blended conversion fell 21.0% — reflecting the larger proportion of browse-oriented shoppers that large traffic events attract. This is expected and does not represent deterioration in buyer quality; the year-over-year comparison is the signal that matters.



Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

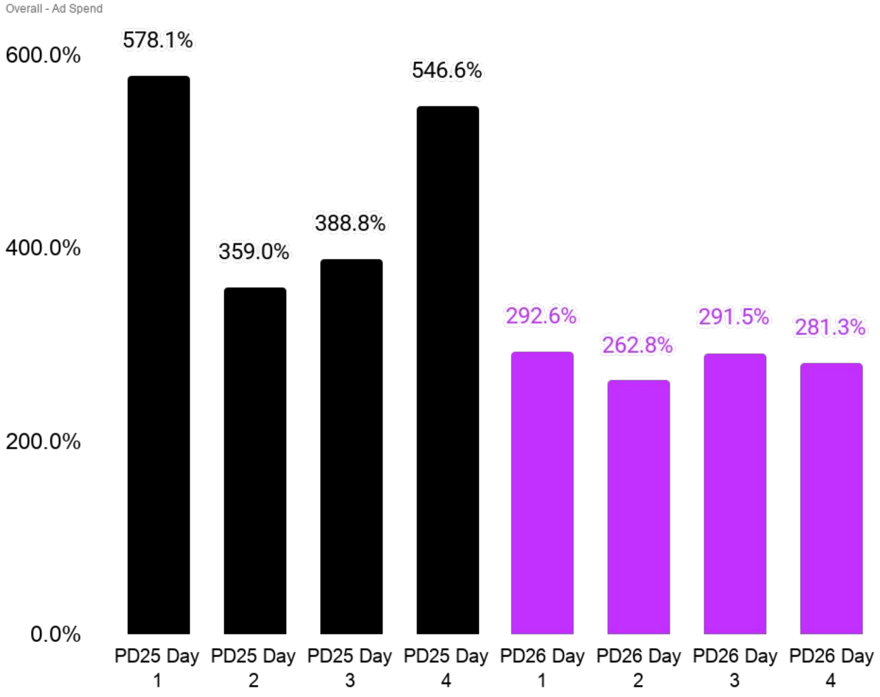
Ad Spend

Ad spend rose 282% above the pre-event baseline — yet fell 18.9% year-over-year as brands concentrated budgets more precisely into high-performing formats

Total ad spend during Prime Day 2026 was 282% above the pre-event daily average, reflecting the expected activation across all four event days. Year-over-year, however, spend declined 18.9% even as revenue grew 20.3%. The inverse relationship — more revenue, less spend — signals deliberate efficiency: brands concentrated investment more precisely and relied on strong organic demand to carry incremental volume.

ROAS compressed 6.8% year-over-year and 35.3% versus the pre-event baseline, reflecting elevated auction costs during the event window.

The combined dynamic of lower spend, growing revenue, and contained CPC inflation (+2.0% year-over-year) suggests brands successfully avoided overpaying for event placements. The 49.6% CPC premium versus the pre-event baseline is the structural cost of event-period auction competition, not incremental year-over-year escalation. For Prime Day 2027 planning, the EU data supports bidding competitively on high-intent placements to maximize reach during the highest-traffic window of the year.



Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

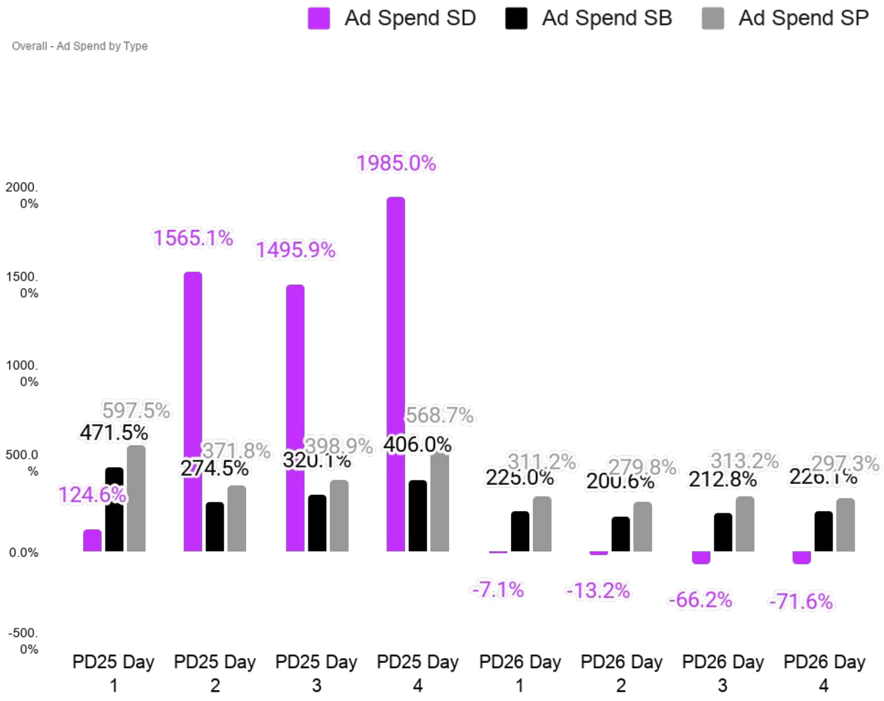
Ad Spend by Type

Sponsored Products dominate at 84% of all event ad investment — Sponsored Display near-eliminated as brands consolidate into performance formats

Media investment consolidated almost entirely into Sponsored Products, which captured 84% of all event ad spend and rose 300.3% above the pre-event baseline. Sponsored Brand claimed the remaining 16% of spend, growing 216.1% versus baseline and a modest 5.6% year-over-year — the only ad format to grow year-over-year. Sponsored Display was near-eliminated at 0.1% of total spend, declining 77.8% year-over-year.

The consolidation into performance formats reflects rational allocation for a high-intent event: Prime Day shoppers search for specific deals and respond to product-level placements. Sponsored Products offers the most direct path from intent to purchase, and the 84% share indicates near-universal agreement among brands that SP is the priority format for event activation.

The risk of an SP-only strategy is reduced upper-funnel visibility for the post-event window. Sponsored Brand and Display campaigns during the event build retargeting audiences of non-converters who remain in-market after Prime Day ends. Brands that eliminated these formats gained short-term efficiency but may have reduced the deferred conversion pool available in the post-event tail.

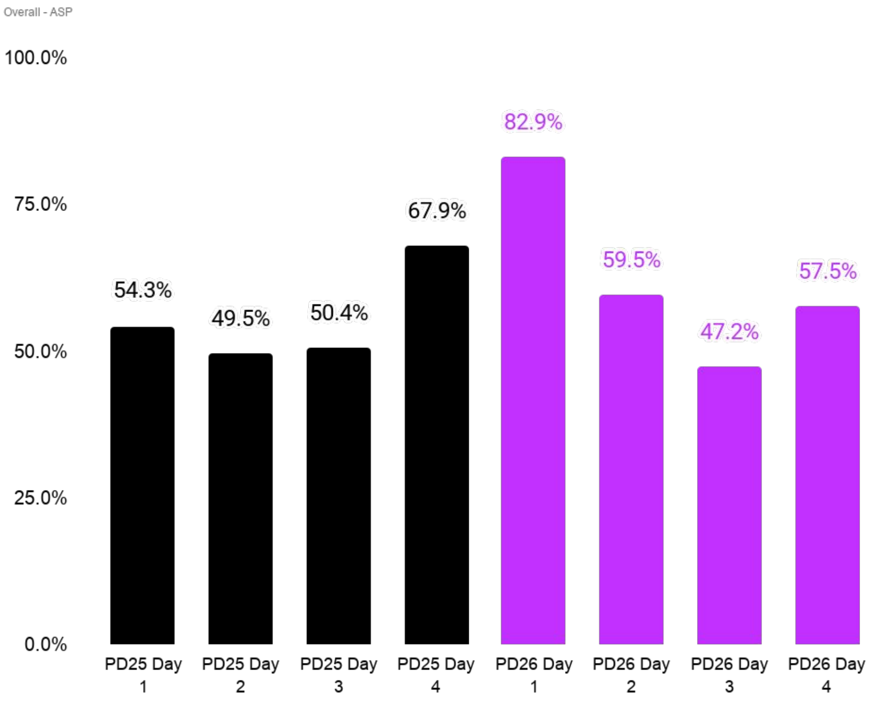


Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

ASP: Prime Day versus L14 Average - 2026 vs. 2025

ASP rose 1.7% year-over-year and 63.7% above the pre-event baseline — stable pricing discipline supported margin protection through a period of heavy event promotions

Average selling price during Prime Day 2026 was 1.7% above Prime Day 2025 — a near-flat year-over-year change representing resilient pricing discipline in an event environment designed to drive deal-seeking behavior. Against the pre-event baseline, ASP was 63.7% higher, reflecting the mix effects of event demand.



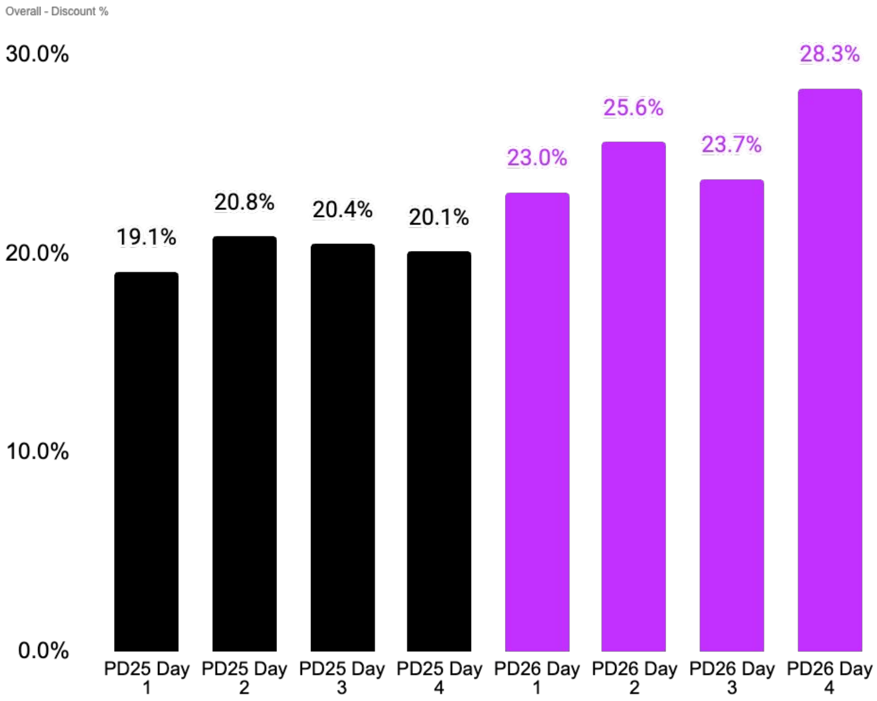
Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Discount %

Promotional depth rose 3.4% year-over-year — a modest, disciplined increase given the 20.3% revenue gain

Blended discount depth grew 3.4% year-over-year and 25.2% above the pre-event baseline, reflecting the deal activation typical of a Prime Day event designed around shopper value expectations. The modest year-over-year deepening — in a period where revenue grew 20.3% — suggests brands did not need to buy growth with significantly heavier discounts than the prior year.

Blended discount depth held steady at 19.7% of list price in Prime Day 2026, up only modestly from 19.0% a year earlier — brands leaned on demand rather than deeper discounting to drive the revenue increase.



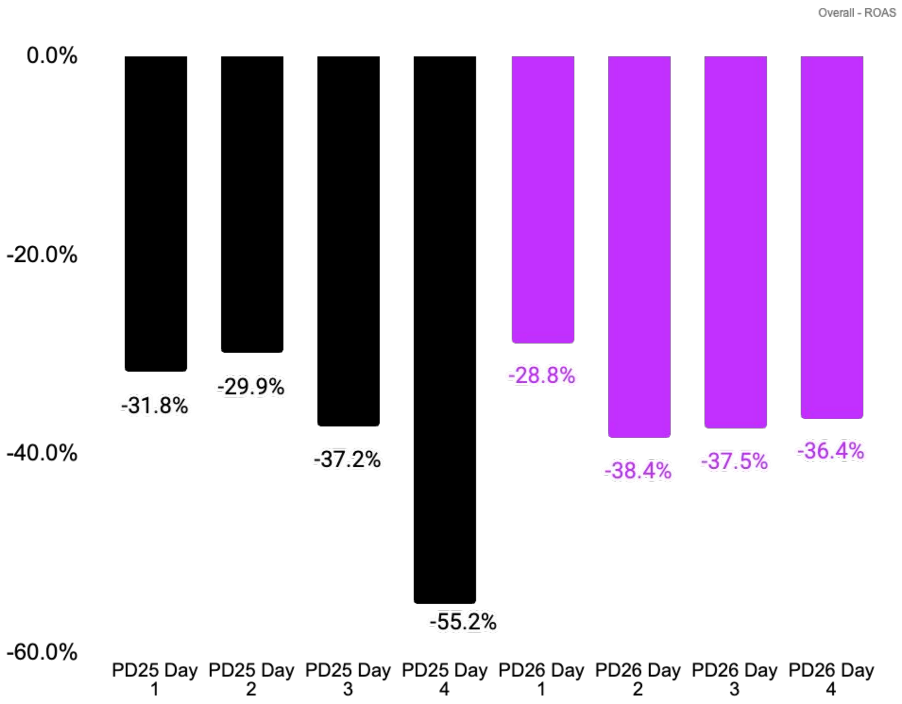
Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

ROAS: Prime Day versus L14 Average - 2026 vs. 2025

ROAS compressed 6.8% year-over-year and 35.3% vs the pre-event baseline — still delivering a healthy 2.76× blended return

Return on ad spend fell 6.8% year-over-year and 35.3% versus the pre-event baseline, as event-period CPC premiums drove up the cost of ad-attributed sales. Even with that compression, the event still returned 2.76× on every pound spent — comfortably profitable and consistent with a sound investment case for the event window.

The compression traces mainly to the event-period CPC premium rather than a genuine efficiency decline: CPC rose just 2.0% year-over-year, so most of the baseline erosion reflects auction-cost seasonality that resets after the event, not a structural drop in ad performance.



Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

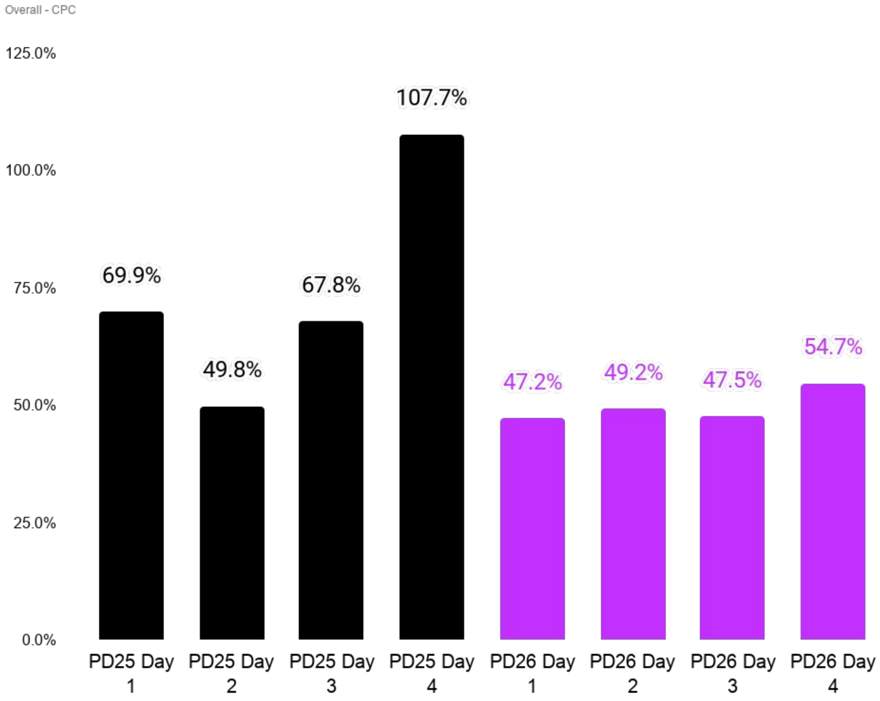
CPC: Prime Day versus L14 Average - 2026 vs. 2025

Cost per click rose 49.6% above the pre-event baseline — yet year-over-year CPC inflation was just 2%, keeping EU auction competition measured

Cost per click during Prime Day 2026 was 49.6% above the pre-event daily average, reflecting the premium brands pay to compete in a high-intent auction where all advertisers activate simultaneously. Year-over-year, however, CPC grew just 2.0% — indicating that EU auction inflation was effectively contained relative to the prior Prime Day event.

The 2.0% CPC growth is notable in the context of an 18.9% reduction in total ad spend. When advertisers reduce spend, competitive pressure typically eases — and the data confirms that bid competition did not escalate despite the revenue opportunity Prime Day 2026 represented. This creates a favorable dynamic for 2027: brands that re-invest at higher spend levels are unlikely to face significant CPC headwinds from prior-year escalation.

Despite modest CPC growth, ROAS compressed 6.8% year-over-year — meaning the compression was driven by revenue efficiency, not escalating bid competition. The event-period CPC premium is the cost of operating in a high-intent environment, not a sign of runaway inflation. For Prime Day 2027, the EU auction environment suggests the primary constraint on ROAS is conversion execution and bid calibration, not CPC escalation.



Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Total industry Amazon UK overview

Prime Day 2026

CommerceIQ

EXECUTIVE SUMMARY

Prime Day 2026 UK: revenue fell 14.4% year-over-year as a 34.6% traffic decline outpaced a landmark 39% conversion improvement and higher ad investment

Ordered revenue was 273.6% above the pre-event daily average across all four Prime Day event days, but fell 14.4% year-over-year as glance views declined 34.6% versus Prime Day 2025. A 39.0% conversion improvement — the strongest in the event data — partially offset the traffic shortfall, but with units down 9.0% year-over-year and ASP down 5.9%, the combined effect could not recover the gap.

Despite the revenue decline, advertising performance improved dramatically. Ad spend grew 14.4% year-over-year, and ad sales grew 90.8% YoY on that spend. ROAS reached 7.79×, a 66.8% improvement over Prime Day 2025 (4.67×). The driver was CPC deflation: cost per click fell 26.9% year-over-year as fewer advertisers competed for a smaller traffic pool, giving remaining advertisers significantly more reach per pound of spend.

The pullback in traffic remains the primary constraint on UK revenue recovery — efficiency gains alone won't offset it without a rebound in reach.

Key takeaways

01 **Revenue fell 14.4% year-over-year — a 34.6% traffic decline outpaced a 39% conversion gain**
Units fell 9.0% YoY and ASP declined 5.9% YoY — both traffic and pricing headwinds compounded against the conversion improvement.

02 **Conversion rose 39% year-over-year — the largest buyer-efficiency improvement in the event data**
Fewer shoppers arrived but each converted at a dramatically higher rate, from 6.33% to 8.80% — a sign of sharply stronger purchase intent.

03 **ROAS surged 66.8% year-over-year to 7.79× — ad efficiency improved even as total revenue declined**
CPC fell 26.9% YoY as auction competition eased — brands captured more reach per pound of spend than Prime Day 2025.

04 **Ad spend grew 14.4% year-over-year — brands leaned into media investment despite the revenue environment**
Sponsored Products captured 81.7% of event spend (+28.5% YoY); Sponsored Display grew +85.4% YoY

05 **Discount depth moderated 4.2% year-over-year even as ASP fell 5.9%**
Pricing pressure came from traffic and mix shifts, not deeper promotions — brands didn't discount their way through the revenue decline.

06 **Reach, not conversion, is the primary constraint to solve for in 2027**
Conversion is already near its practical ceiling for the event — recovering revenue depends on rebuilding traffic, not further efficiency gains.

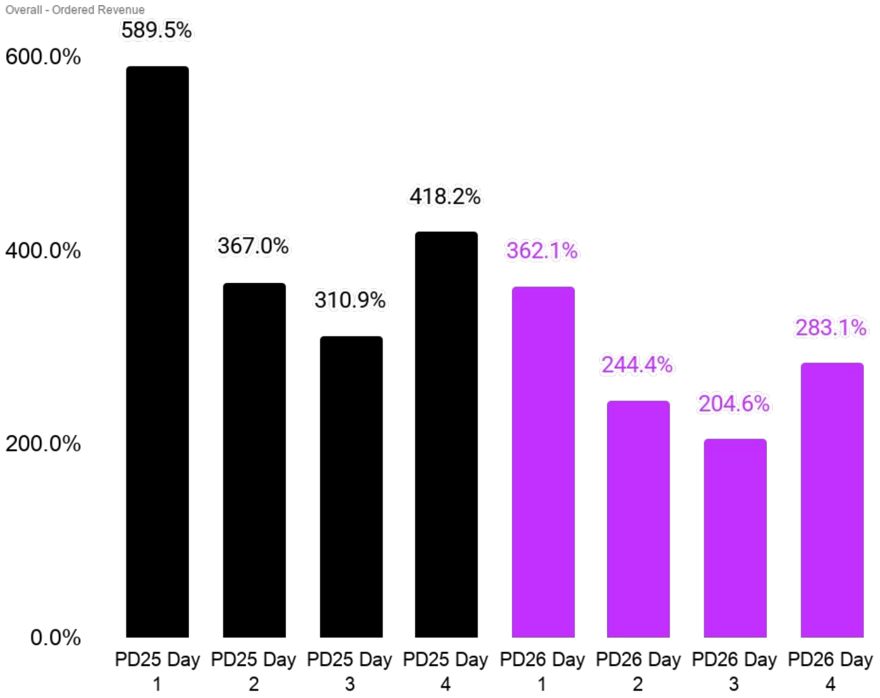
Ordered Revenue

Ordered revenue fell 14.4% year-over-year — a 34.6% traffic decline outpaced a 39% conversion surge and kept units and revenue below prior-year levels

Ordered revenue was 273.6% above the pre-event daily average across all four Prime Day event days. Year-over-year, revenue declined 14.4% as glance views fell 34.6% — a traffic shortfall that the 39.0% conversion improvement and 14.4% ad spend increase could not fully close. Units fell 9.0% year-over-year and ASP declined 5.9%, both compounding the revenue impact.

The conversion improvement was large — nearly 40% — but traffic was down by a third. When the traffic pool shrinks this significantly, even an exceptional conversion gain cannot close the gap.

Recovering revenue in 2027 will depend more on rebuilding traffic than on further conversion gains, which are already near their practical ceiling for this event.



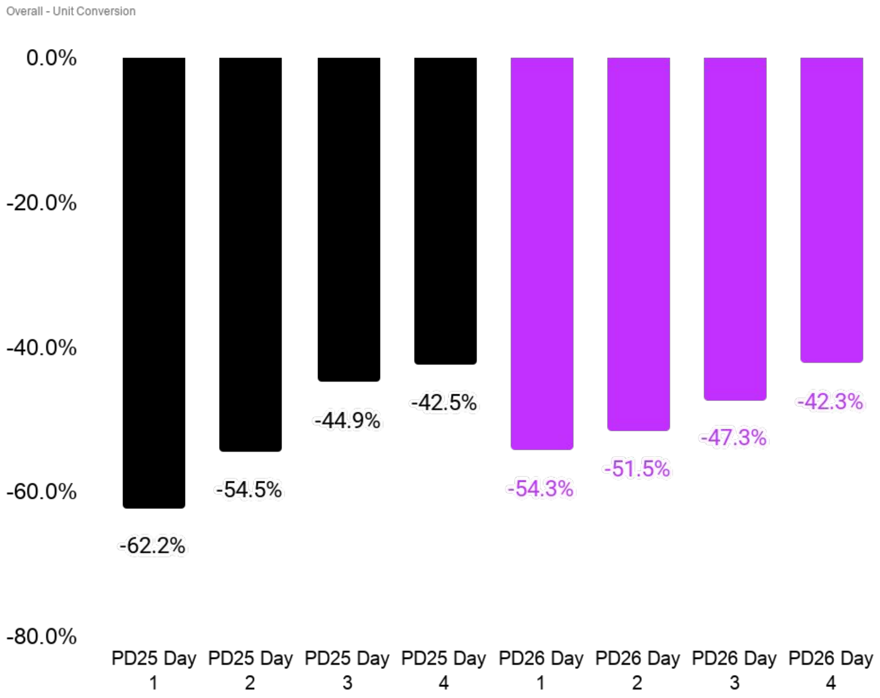
Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Unit Conversion

Conversion rose 39% year-over-year to 8.80% — the standout efficiency gain, but the traffic shortfall was too large for conversion alone to close

Blended unit conversion improved 39.0% year-over-year — from 6.33% to 8.80% — the largest year-over-year conversion improvement in the event. Fewer shoppers arrived, but each converted at a dramatically higher rate, reflecting sharply stronger purchase intent per visit. This is the signal that demand quality improved even as reach contracted: the visitors who did engage were highly motivated buyers.

The conversion gain was broad-based across the event rather than driven by a single lever, suggesting pricing and availability improvements translated widely across the funnel.



Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

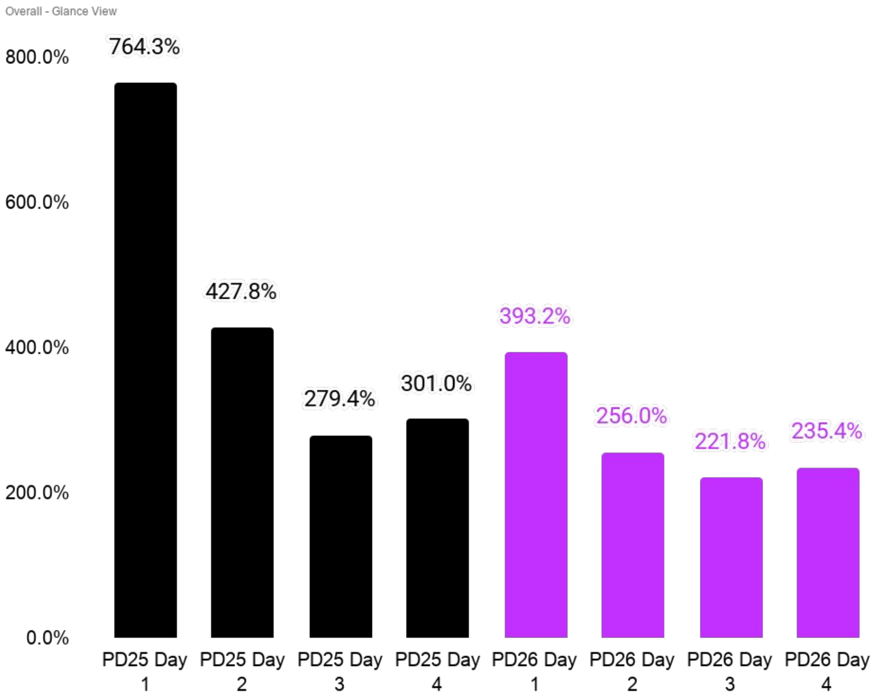
Glance Views

Glance views rose 276.6% above the pre-event baseline — yet fell 34.6% year-over-year, the primary driver of the revenue decline

Glance views were 276.6% above the prior 14-day daily average during Prime Day 2026 — a significant event-period traffic surge versus the everyday baseline. Year-over-year, however, glance views declined 34.6% compared to Prime Day 2025. This traffic shortfall is the single largest driver of the 14.4% revenue decline: even with conversion improving 39% year-over-year, a third fewer visits constrains the total addressable purchase volume.

The traffic decline was broad-based across the event rather than concentrated in any single driver, reinforcing that reach — not audience quality — is the constraint to solve for.

The traffic decline year-over-year is the central strategic question for Prime Day planning. With conversion already at a strong 8.80% — and ad efficiency improving dramatically due to CPC deflation — the primary lever for revenue recovery is attracting more visitors to the event. Brands that drove incremental traffic through upper-funnel and awareness investment (including Sponsored Display, which grew 85.4% YoY) will be best positioned if traffic normalizes in future events.



Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

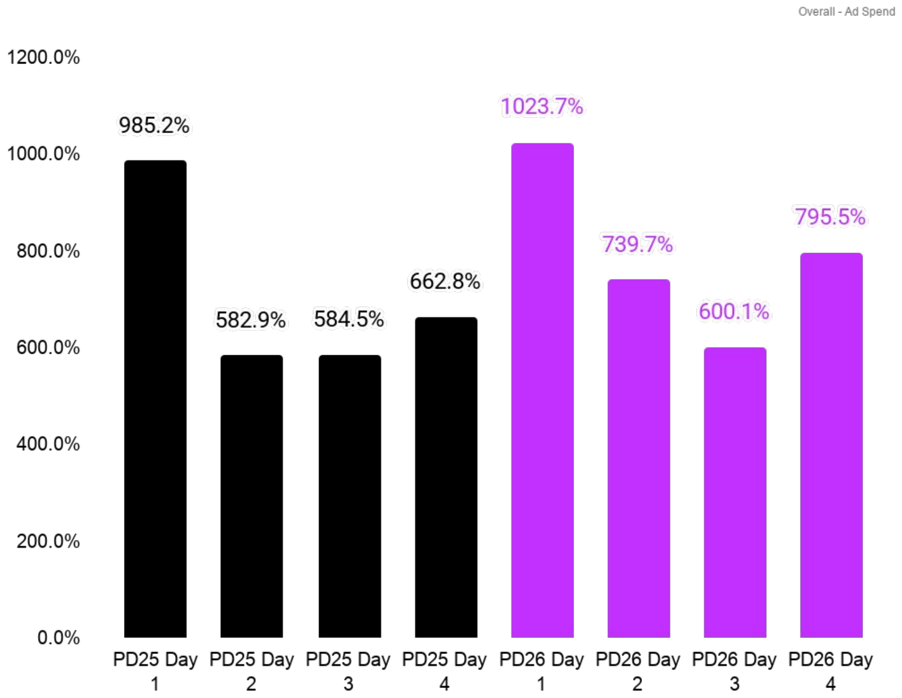
Ad Spend

Ad spend rose 789.7% above the pre-event baseline and 14.4% year-over-year — brands leaned into media investment, and efficiency improved dramatically

Total ad spend was 789.7% above the L14 daily run rate across all four event days. Year-over-year, spend grew 14.4% despite a declining revenue environment, while ad sales grew 90.8% on that same spend — driving ROAS to 7.79×, a 66.8% year-over-year improvement.

The ROAS surge was driven by CPC deflation: cost per click fell 26.9% year-over-year as overall traffic declined, reducing auction competition and allowing brands that maintained or increased spend to capture a larger share of placements at materially lower cost.

The UK's combination of higher spend and dramatically better ROAS is instructive — when CPC falls, increasing ad investment is a high-return decision even in a softer revenue environment. For Prime Day 2027, the key question is whether CPC normalizes upward as more brands recognize the efficiency opportunity. Early investment to build keyword history and quality scores before the event will be the competitive advantage for brands that want to maintain this edge.



Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

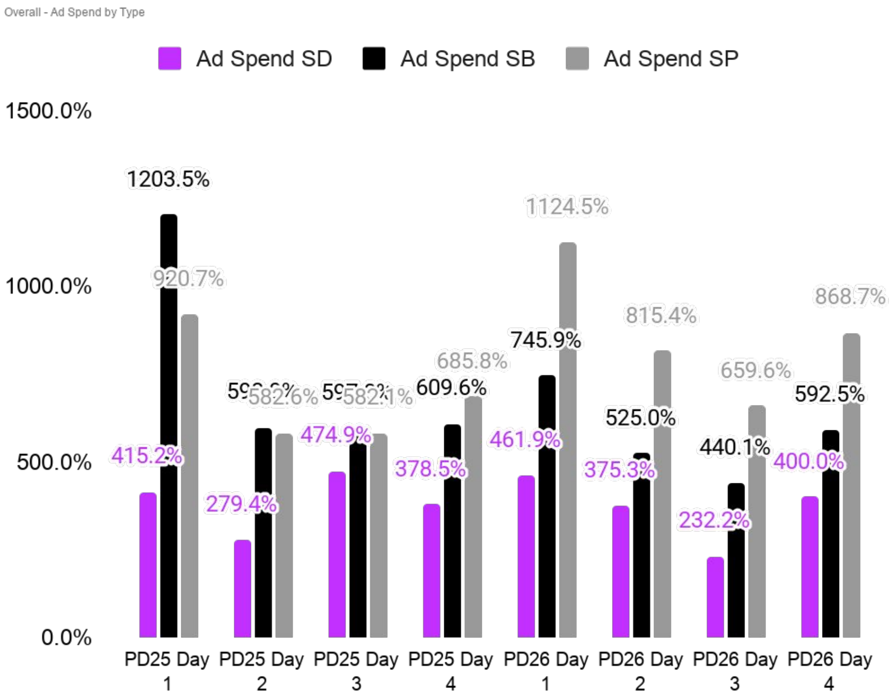
Ad Spend by Type

Sponsored Products at 81.7% of event spend, up 28.5% year-over-year — Sponsored Display grew 85.4% YoY as UK brands expand awareness investment

Sponsored Products captured 81.7% of all event ad spend, growing 28.5% year-over-year and 867.0% versus the pre-event baseline. SP's dominant share reflects its status as the primary performance vehicle for event activation — directly connecting high-intent search queries to product-level placements with measurable conversion attribution.

Sponsored Brand declined 26.3% year-over-year but retained 17.1% of event spend — maintaining top-of-search brand visibility above the product listing level. The most notable shift was in Sponsored Display: growing 85.4% year-over-year, SD took 1.2% of total event spend. While small in absolute terms, the growth signals deliberate investment in awareness and retargeting audiences that can be activated post-event.

The UK's mix — SP dominant, SB steady, SD growing — reflects a balanced funnel strategy. Maintaining investment across all three formats helped sustain a pipeline of qualified traffic beyond what Sponsored Products alone could convert.



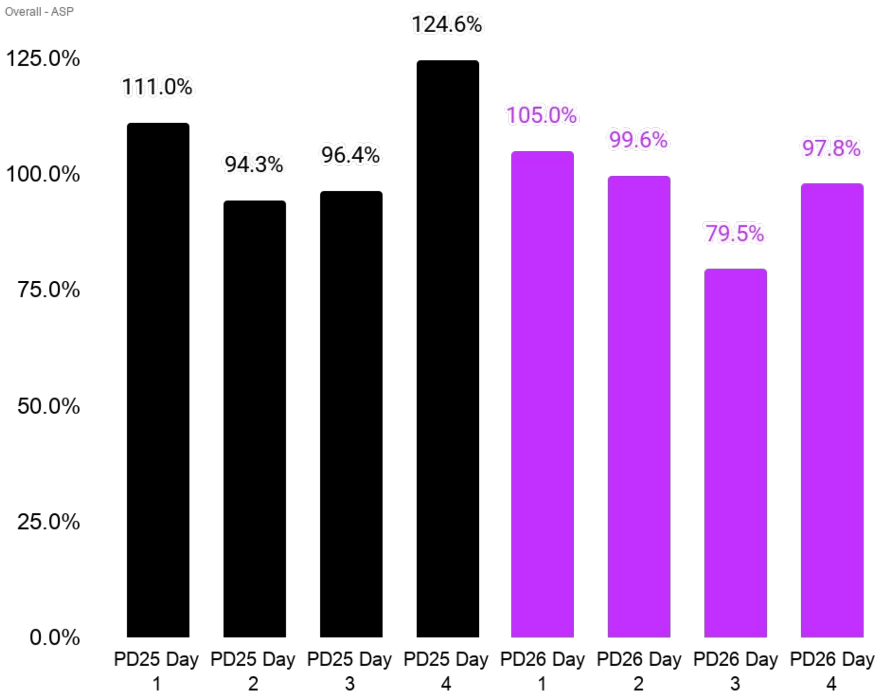
Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

ASP: Prime Day versus L14 Average - 2026 vs. 2025

ASP rose 96.3% above the pre-event baseline — yet fell 5.9% year-over-year

Average selling price was 96.3% above the pre-event daily average during Prime Day 2026. Year-over-year, ASP declined 5.9% — contributing directly to the revenue decline alongside lower traffic. The ASP compression reflects both deeper promotional discounting in key categories and a mix shift within the basket.

The blended discount depth across all categories was 4.2% lower year-over-year at 22.2%, meaning the overall mix moderated.



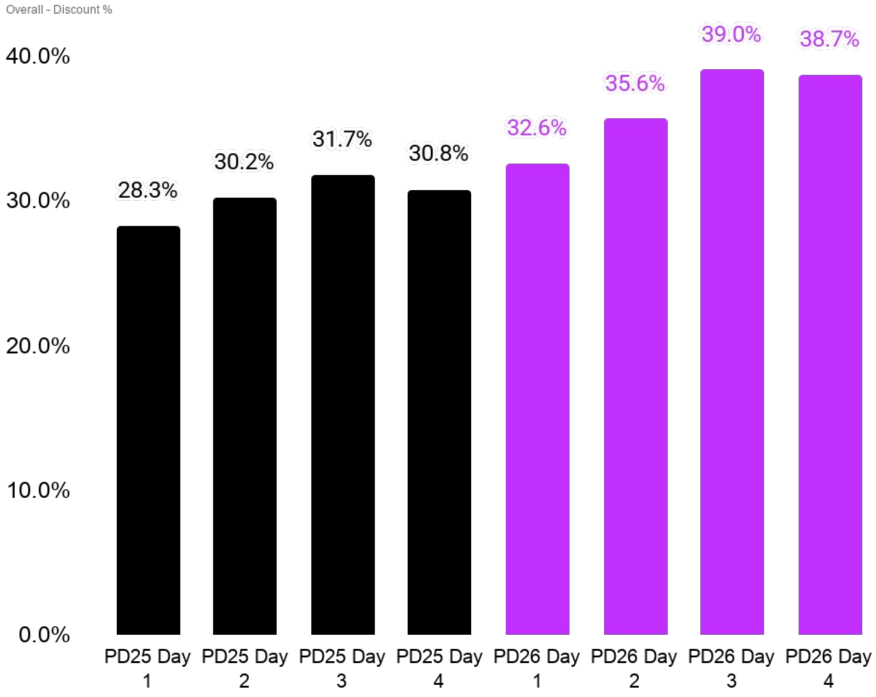
Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

Discount %: Prime Day versus L14 Average - 2026 vs. 2025

Blended discount depth moderated 4.2% year-over-year to 22.2% — signaling brands leaned on demand rather than deeper discounting to drive results.

Blended discount depth during Prime Day 2026 was 22.2% — 4.2% lower year-over-year and 36.5% above the pre-event daily average. The year-over-year moderation in discount depth is notable: while the event generated strong deal activation versus baseline, brands collectively did not deepen promotions versus the prior year. The aggregate promotional stance was more restrained, not more aggressive.

The pullback in discounting came even as ROAS surged and conversion hit an event high — evidence that demand, not deal depth, drove the improved results, pointing to healthier unit economics heading into Prime Day 2027.



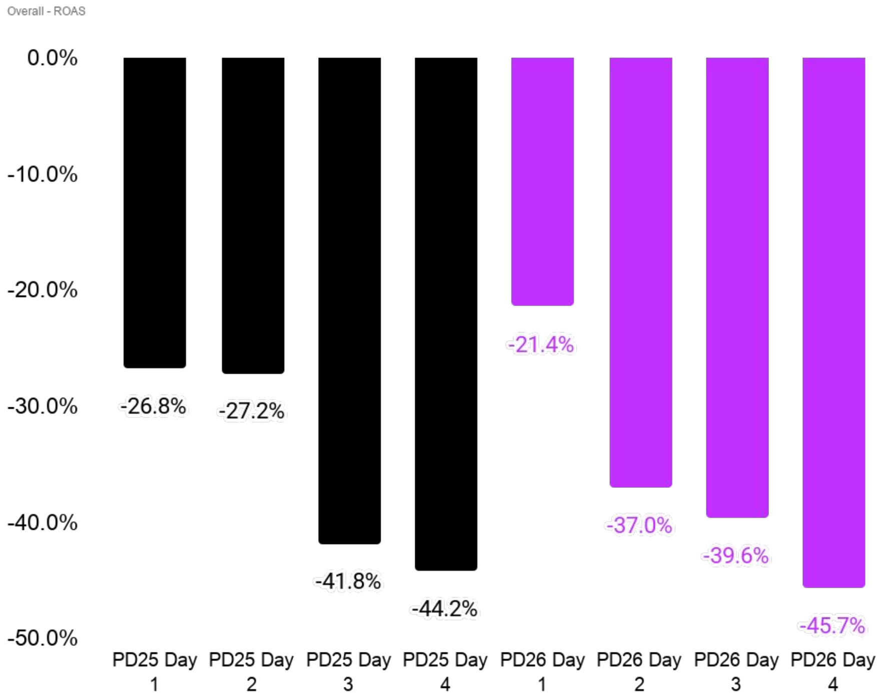
Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

ROAS: Prime Day versus L14 Average - 2026 vs. 2025

ROAS surged 66.8% year-over-year to 7.79× — ad efficiency improved dramatically as CPC fell 26.9% and ad sales grew 90.8% on only 14.4% more spend

Return on ad spend reached 7.79× during Prime Day 2026 — a 66.8% improvement over Prime Day 2025 (4.67×) and well above the pre-event baseline (-34.8% vs L14, reflecting the cost of event-period CPC premiums). The ROAS surge was driven by the combination of falling CPC (-26.9% YoY) and rising conversion (+39.0% YoY): brands paid less per click and those clicks converted at a dramatically higher rate.

The ROAS improvement creates a favorable base for Prime Day 2027 planning: if CPC normalizes upward (as more brands recognize the efficiency opportunity), brands that are already in the auction with established keyword histories and quality scores will be less exposed to the re-inflation. The current ROAS environment favors increased investment — and the 66.8% year-over-year improvement validates the decision by brands that increased spend despite lower overall revenue.



Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

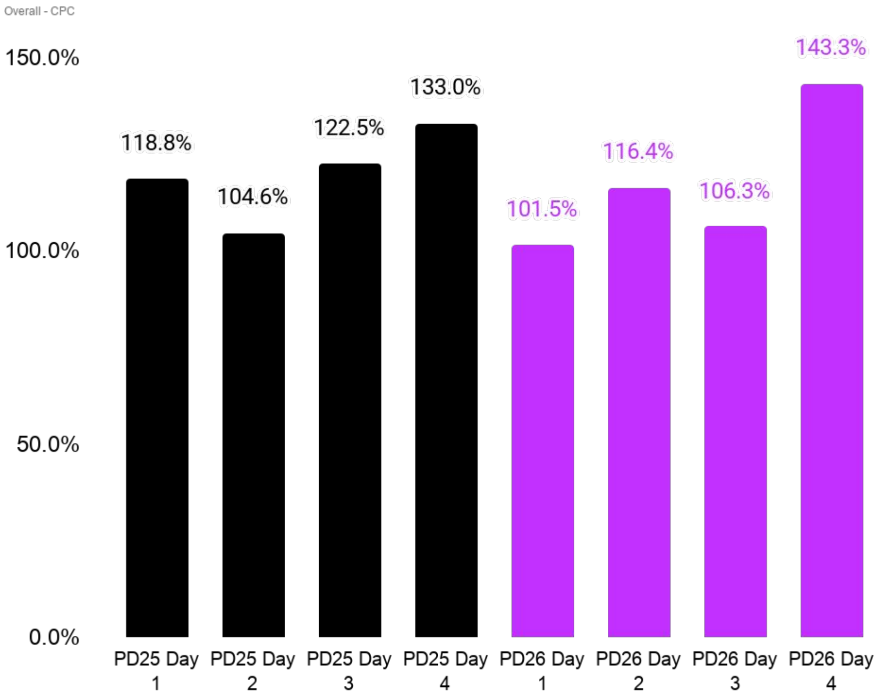
CPC: Prime Day versus L14 Average - 2026 vs. 2025

CPC fell 26.9% year-over-year — auction deflation gave brands significantly more reach per pound of ad spend than Prime Day 2025, fuelling the ROAS surge

Cost per click during Prime Day 2026 was 115.3% above the pre-event daily average — the expected event-period auction premium — but fell 26.9% year-over-year from Prime Day 2025, reflecting eased competition as overall traffic declined 34.6% year-over-year.

CPC deflation is the mechanical driver of the ROAS surge. When cost per click falls 26.9% and conversion rises 39.0% simultaneously, the return on each ad pound invested improves dramatically — exactly what the data shows, with ROAS reaching 7.79× versus 4.67× the prior year. Brands that increased spend into a deflating CPC environment captured the full benefit of the efficiency window.

The key planning question is CPC trajectory. If traffic normalizes upward in Prime Day 2027, advertiser competition will increase and CPC will likely partially recover; if traffic continues to contract, deflation may persist. Brands that build bidding infrastructure — keyword portfolios, campaign structures, quality score history — during the current low-CPC window will be best positioned to defend their efficiency advantage as conditions tighten.



Source: Internal CommerceIQ platform data collected during the four-day Amazon Prime Day 2026 event.

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