PMG

2025 AMAZON PRIME DAY LOOKBACK

RETAIL LANDSCAPE INSIGHTS & STRATEGIC CONSIDERATIONS FOR H2



EXECUTIVE SUMMARY

The July 2025 Prime Day event reflected a buzzing retail landscape, where promotional strategy, consumer value-seeking, and timing across the broader portfolio played critical roles. **PMG analysis found Amazon sales grew +4.9% versus the 2024 event**, led by consumer packaged goods like Health & Household essentials (+209 bps) and Beauty & Personal Care (+99 bps), while Big Box competitors, like Walmart, also saw significant gains during the same promotional window. **On Amazon, promotional breadth increased, but discount depth declined**, pointing to more measured, margin-conscious strategies. **Clicks rose +10% YoY while conversions fell -14%, and a late-event conversion spike on Day 4 suggests many shoppers delayed buying decisions.** This, combined with a rise in cross-purchasing behavior from other major retailers, indicate **consumers are increasingly deal hunting during major shopping events**.

With the shift in Prime Day to early July, the broader retail landscape saw a consistent cadence of promotions throughout the month, with brands blending July 4th campaigns, Prime-aligned offers, and extended tail-end deals in an effort to sustain visibility across fluctuating demand windows. While promotional pacing varied, these strategies reflected a broader push to meet shoppers where they were: early, active, and increasingly discerning. **Many PMG portfolio brands saw performance peaks earlier in the month, with a more noticeable drop-off during and in the days following the Prime event.** This pattern suggests that demand was pulled forward by early-July promotional activity, as consumers consolidated their spending ahead of the event window.

As back-to-school enters full swing, this year's July Prime Day event increasingly served as its unofficial kickstarter. In that same vein, October's Prime Big Deal Days have emerged as a soft launch to holiday, with brands last year seeing strong performance when activating early in the season. **With a more flexible holiday calendar ahead and early intent building, brands that time their activations to align with demand surges, and maintain clear, compelling value messaging, will be best positioned to win.**



Sources: PMG Proprietary Analysis, Bloomberg

Forces Influencing the July 2025 Prime Day Environment



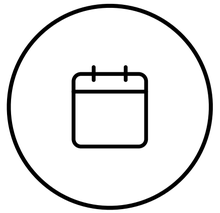
TARIFF FALLOUT

Ongoing trade disputes, especially with China, Mexico, and Canada, **continued to pressure supply chains and margins heading into July**. Elevated input costs remained a watchpoint for retailers across categories.



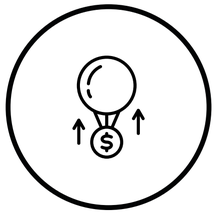
CONSUMER BEHAVIOR

Retail spending remained strong, surpassing early-year projections, but **value-consciousness persisted**, especially among lower-income households. Shoppers continued to prioritize core needs and leaned more heavily on promotions, while delaying or trading down in discretionary categories.



EVENT DURATION

For the first time, **Amazon Prime Day spanned four full days**, introducing a mid-event lull and late-stage surge that demanded more sustained visibility, and strategic discount pacing from brands.



INFLATION PROGRESS

Inflation gradually cooled in early summer, though more slowly than expected. While rate cuts had not yet materialized, economic conditions remained relatively stable ahead of Prime Day.



GEOPOLITICAL RISK

Tensions in the Middle East, particularly between the U.S. and Iran, **added volatility to energy markets**. Rising oil prices contributed to broader macro uncertainty during the Prime Day period.



RETAIL PARTICIPATION

Most major retailers and brands activated overlapping promotions, creating a crowded competitive landscape that reinforced consumers' deal-seeking behaviors and heightened the pressure to convert throughout the event window.

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Amazon's Longer Prime Day Saw Record Sales, with Shallower but More Pervasive Discounting

Prime Day 2025 drove +4.9% YoY sales growth on Amazon US, led by broader discounting and strong CPG performance. Sales peaked on Day 1 and rebounded on Day 4, highlighting the need for brands to sustain momentum across a longer event window.

Breadth of Discounted Products Increased

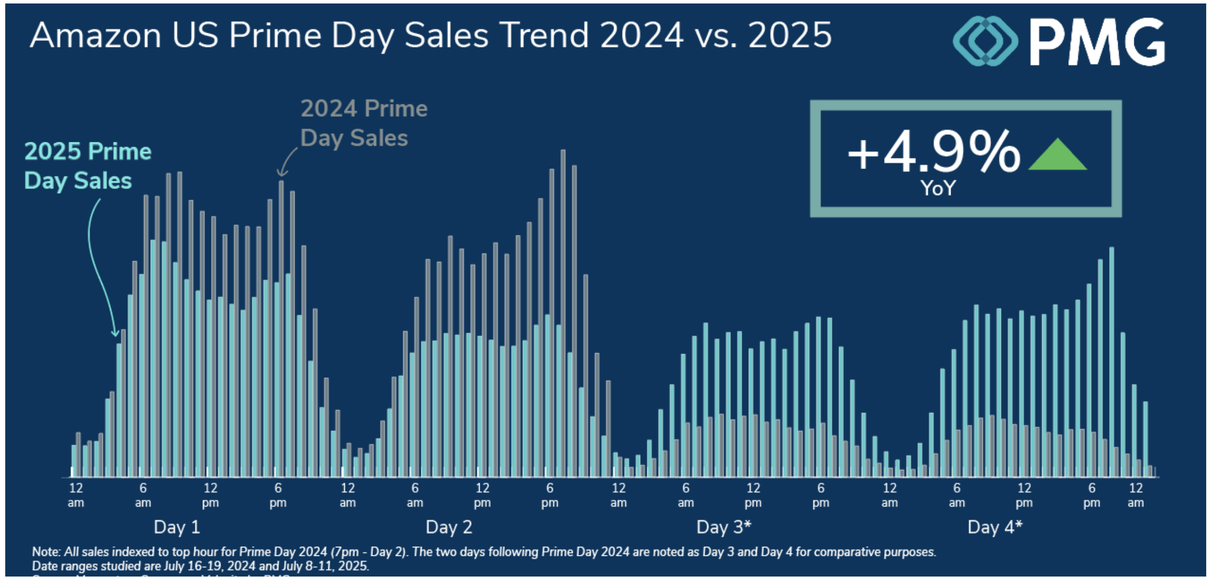
Across the full four days of Prime Day 2025, **25.6% of products on Amazon US featured discounts**, representing an +8% increase from 2024.

Average Depth of Discounts Decreased

While more products were on sale, **the average discount depth decreased to 21.7%, down -11% from 24.4% in 2024**. Average discount depth grew each day, suggesting brands strategically deepened discounts to maintain momentum.

Four-Day Event Created 'Mid-Event' Lull

Day 1 of the sale event represented the peak in terms of sales activity, with a second surge coming on Day 4. In the intervening days, sales were well above a typical day but lagged behind historic highs. This naturally placed greater importance on brands allocating resources and planning promotional efforts strategically, to stay visible and ultimately convert browsers to buyers as the event wound to a close.



PMG Source: PMG Proprietary Analysis

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Category Performance Mixed Amid Slightly Shallower Discounts

HOME & KITCHEN

YoY Sales Growth

+2.1%

Average Discount

21%

Down from 23% LY

% of Products On Sale



Top 5 Brands by Sales

Shark | Ninja | Amazon Basics | Dyson | Bissell

APPAREL & ACCESSORIES

YoY Sales Growth

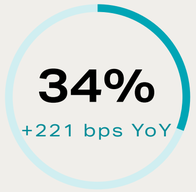
+14.4%

Average Discount

24%

Down from 25% LY

% of Products On Sale



Top 5 Brands by Sales

Skechers | Adidas | CRZ Yoga | Amazon Essentials | Brooks

ELECTRONICS

YoY Sales Growth

-9.7%

Average Discount

22%

Down from 24% LY

% of Products On Sale



Top 5 Brands by Sales

Apple | Samsung | Beats by Dre | Bose | Sony

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Source: PMG Proprietary Insights

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Shopping Priorities Point to Continued Shift Away from Big-Ticket Items

Beauty & Personal Care Purchases Dominated, Top Categories Included Home, Beauty, Apparel & Household Goods

There's been a definite shift in the categories most popular on Amazon during Prime Day. In 2025, **CPG categories like health & household, beauty and grocery** saw increases in their share of total sales. At the same time, **electronics and home & kitchen** saw their share of total sales drop year-over-year.

This trend is consistent to last year, as **changing shares indicated that shoppers were gradually shifting away from buying big-ticket items during Prime Day on Amazon**.

		2025 Share of Sales	YoY Change
01	Home & Kitchen	16.7%	-50 bps
02	Apparel & Accessories	7.4%	+60 bps
03	Health & Household	13.8%	+209 bps
04	Electronics	14.5%	-237 bps
05	Beauty & Personal Care	9.2%	+99 bps

PMG Source: PMG Proprietary Insights

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Top Level Advertising Metrics for Prime Day 2025 on Amazon Signal Broader Deal-Hunting Across Retail Landscape

WHAT HAPPENED

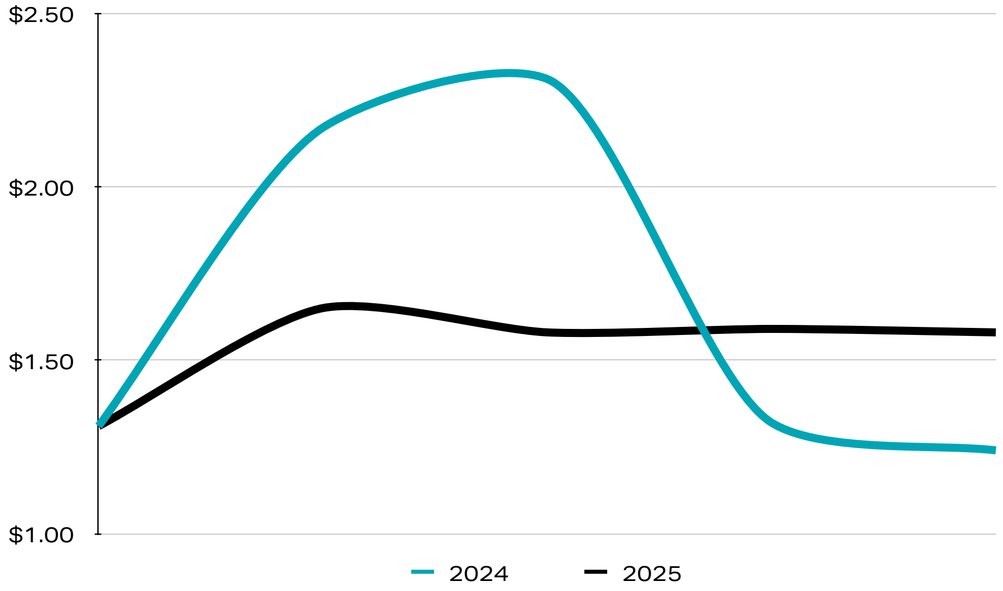
Clicks Rose, While Conversion Rates, AOV, & CPCs Declined YoY
Despite Amazon's YoY sales growth, **performance across metrics point to major deal-hunting across ecommerce retailers**. Click performance shows people were very active on Amazon, but simply didn't convert at nearly the same rates as in 2024.

Total Clicks	+10% YoY
Average Order Value	-1% YoY
Conversion Rate	-14% YoY
CPCs	-29% YoY

CPCs Didn't Rise with Day 4 Sales for Prime Day 2025

Average CPCs Across PMG's Brands on Amazon

Amazon US - One Day Prior to Prime Day Through Day 4* - 2024 & 2025



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Source: PMG Proprietary Insights
Note: Figures are based on a broad, PMG client set.

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Retailers Surrounded Prime Day with Consistent Promotions Throughout July

WHAT HAPPENED

71% of tracked brands aligned promotions to Prime Day in 2025

1

July 4th and Prime Promotions Created a Continuous Window of Activity in 2025

This year, **31% of tracked brands extended their July 4th promotions into Prime Day**, with many offers launching on or before July 1. The close proximity of Prime (July 8–11) to the holiday weekend likely encouraged some brands to maintain momentum across both events. A second wave of campaigns launched on Prime Day itself, with brands launching net-new or refreshed offers.

2

Most Promotions Extended Past Prime Day

In both 2024 and 2025, promotion volume remained elevated immediately following Prime Day, as many brands either extended their existing offers or introduced new ones. This year, some promotions remained live well into mid-to-late July—up to ten days after the event, suggesting a longer tail of activity. While many brands shifted their timing forward earlier to align with Prime's earlier July placement this year, the continued presence of late-month campaigns reflects how some maintained visibility beyond the core event window.

3

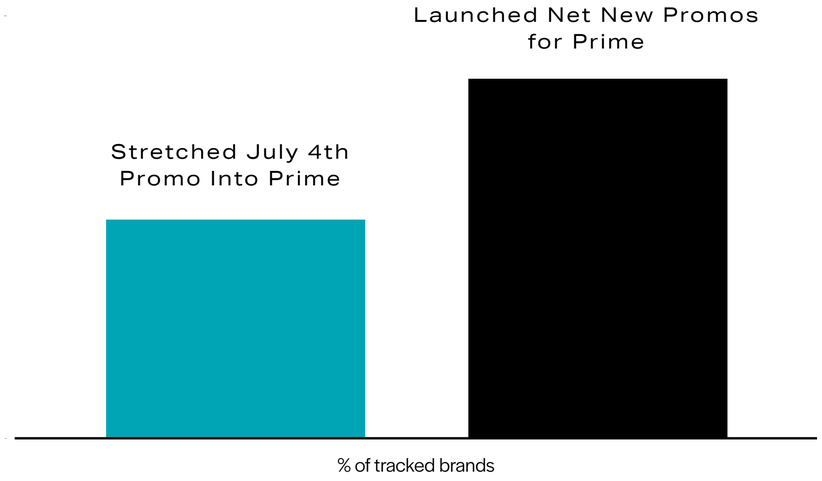
Big Box Deals Aligned with Prime Timing this Year

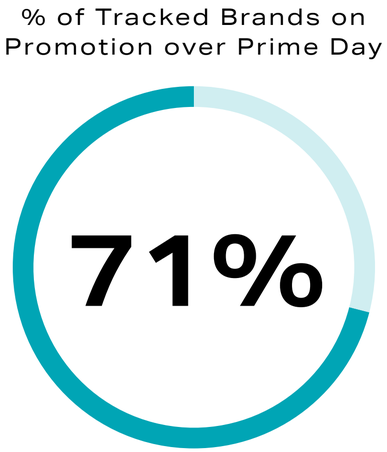
Big box retailers (i.e., Walmart and Target) began major promotions 1-2 days before Prime Day and extended deals to end one day after Amazon's, versus starting deals a week before Prime last year.

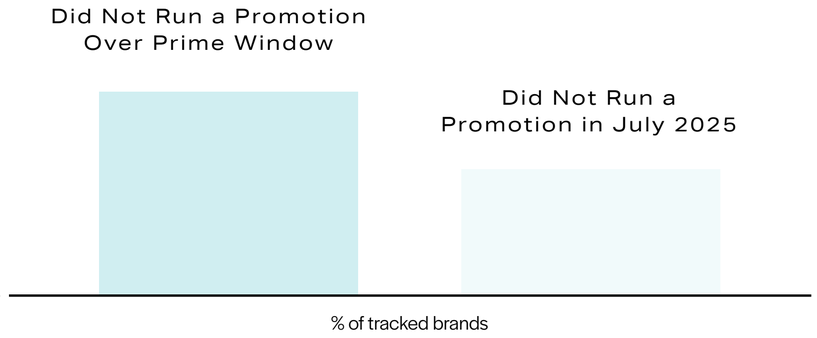
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Many Brands Launched Net New Promotions After Prime

22% of brands introduced new promotions following Prime Day, an increase from trends seen last year.







Source: PMG Proprietary Insights

Note: 2025 promotion trends are based on a sample of about 100 retailers across the apparel, home, electronics, and beauty categories. This reflects a larger sample than tracked in 2024, so year-over-year comparisons should be viewed as directional.

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Retailer Offerings at a Glance

Discount Messaging by Category

BIG BOX BRANDS

Up to 50% off

Most common discount messaging

APPAREL BRANDS

***Up to 20-40% off**

****Up to 50-70% off**

Most common discount messaging
*full price items
**clearance items

HOME BRANDS

Up to 50-70% off
Extra 20% off

Most common discount messaging

Strategies at a Glance

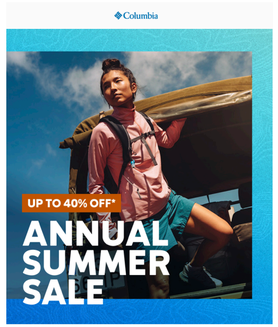
Big Box Deals Sitewide Overlapped Directly with Prime This Year

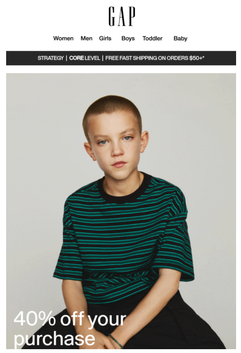




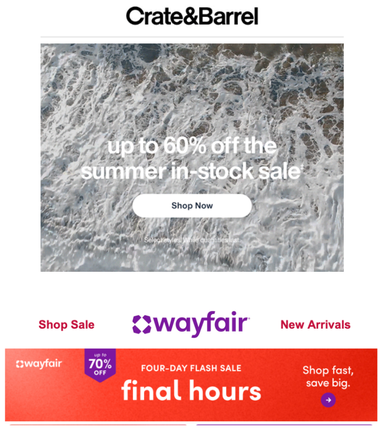
Apparel Brands Ran End of Season Clearance Sales; Select Brands Offered Full-Price Discounts

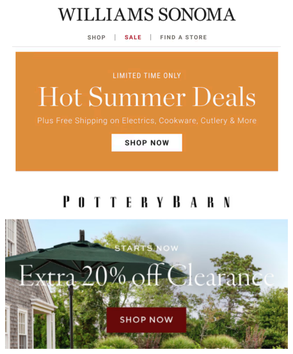






Home Brands Offered Free Shipping and Summer Sales





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Source: PMG Proprietary Insights
Note: Based on a subset of retailers analyzed

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PMG Portfolio Insights: Prime's Placement Near July 4th Weekend Had Bigger Impact on July Performance Than the Event Itself

Tracked retailer site traffic moderated during Prime—similar to trends observed last year—but the decline was more gradual in 2025, with stronger traffic sustained on Day 1. **Brands likely benefited from the event's closer alignment with the July 4th weekend and a more extended Prime window.** Revenue followed a similar pattern, with demand peaking earlier in the month, showing that traffic was qualified and visitors were intent-driven.

Unlike in 2024, traffic in 2025 was more front-loaded, with steeper drop-offs in the days following Prime. This pattern suggests that the shift in timing closer to the Fourth of July—rather than a direct halo effect from Prime—more meaningfully influenced performance across the broader month.

TRACKED RETAILER TRAFFIC, INDEXED TO JULY 2024 PRIME DAY

Day of Week	Date	Tracked Retailer Avg
MON	7/1/24	
TUES	7/2/24	
WED	7/3/24	
THURS	7/4/24	
FRI	7/5/24	
SAT	7/6/24	
SUN	7/7/24	
MON	7/8/24	
TUES	7/9/24	
WED	7/10/24	
THURS	7/11/24	
FRI	7/12/24	
SAT	7/13/24	
SUN	7/14/24	
MON	7/15/24	
TUES	**7/16/24**	
WED	**7/17/24**	
THURS	7/18/24	
FRI	7/19/24	
SAT	7/20/24	
SUN	7/21/24	

TRACKED RETAILER TRAFFIC, INDEXED TO JULY 2025 PRIME DAY

Day of Week	Date	All Avg
TUES	7/1/25	
WEDS	7/2/25	
THU	7/3/25	
FRI	7/4/25	
SAT	7/5/25	
SUN	7/6/25	
MON	7/7/25	
TUE	**7/8/25**	
WED	**7/9/25**	
THU	**7/10/25**	
FRI	**7/11/25**	
SAT	7/12/25	
SUN	7/13/25	
MON	7/14/25	
TUES	7/15/25	
WEDS	7/16/25	
THU	7/17/25	
FRI	7/18/25	
SAT	7/19/25	
SUN	7/20/25	
MON	7/21/25	

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Source: PMG Proprietary Insights
Note: Based on a subset of retailers analyzed

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STRATEGIC CONSIDERATIONS FOR H2 2025

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Considerations for H2: Timing Signals

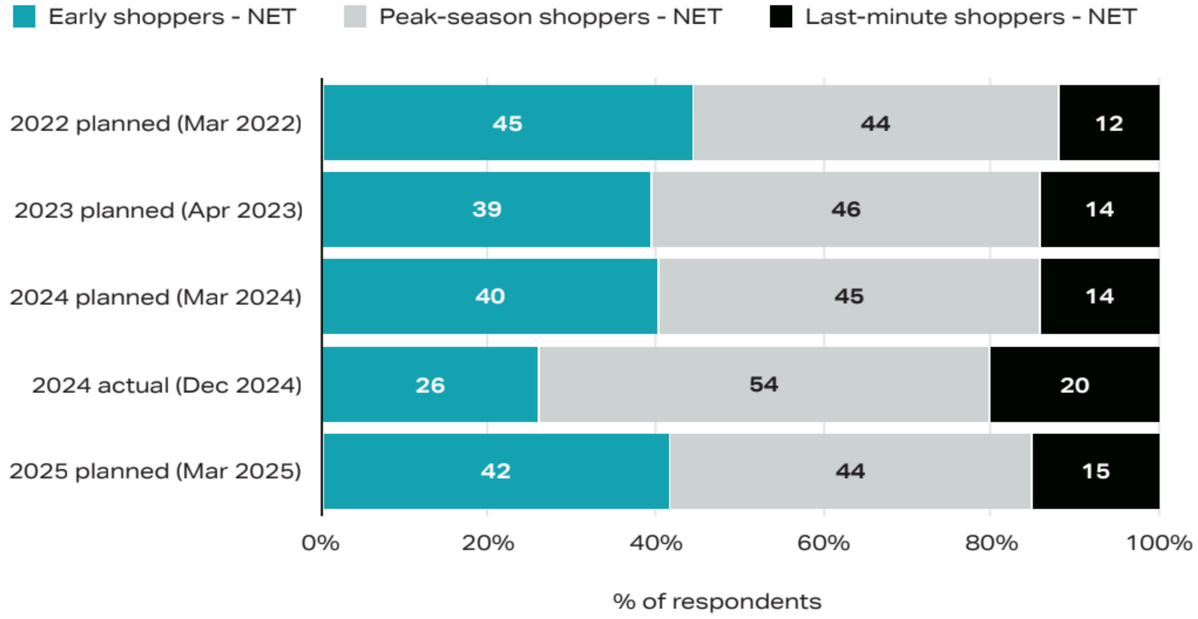
In addition to discounting and value messaging, **timing played a meaningful role in broader retailer performance during this year's July Prime Day event**. As we look ahead to the rest of 2025, understanding when consumers plan to shop, and how that aligns with promotional strategy, will be critical to success.

Shopping plans have returned to pre-2024 levels, with 42% of consumers planning to shop early, up from just 26% who actually did so last year (Mintel).

This shift suggests **a renewed focus on value, inventory security, and spreading out spending amid economic uncertainty**. **Peak-season (Black Friday to mid-December) shopping remains steady year-over-year**, while last-minute shopping continues to slightly outpace pre-2024 norms.

The 2024 gap between intent and behavior underscores the importance of real-time responsiveness, pricing, and promotions. Economic conditions still heavily influence when consumers convert.

U.S.: Year-over-Year Comparison of Shopping Timeframes, 2022-25



Source: Mintel

Holiday shopping behaviors have shifted notably in recent years, with a growing gap between planned and actual early-season purchases. In 2024, just 26% of consumers followed through on early shopping, well below the 40% who said they would. Meanwhile, peak-season and last-minute shopping grew, suggesting many consumers delayed spending due to economic uncertainty. For 2025, early shopping intent has returned to 42%, but follow-through will likely depend on macro conditions and promotional strategies in Q4.

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Holiday 2025 Calendar Considerations

The 2025 retail calendar offers slightly more breathing room for both shoppers and marketers, with 28 days between Thanksgiving and Christmas (versus 27 in 2024). This extra day, along with earlier Hanukkah timing and a smoother Cyber Week transition, allows for more deliberate promotional pacing and potentially longer conversion windows.

November & December 2025 Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
23	24	25	26	27 **THANKSGIVING**	28 **BLACK FRIDAY**	29 **SMALL BUSINESS SATURDAY**
30	1 **CYBER MONDAY**	2 **GIVING TUESDAY**	3	4	5	6
7	8	9	10	11	12	13 *FedEx Ground Cutoff*
14 **HANUKKAH BEGINS**	15	16	17 *UPS Ground Cutoff*	18 *USPS Retail Ground Cutoff*	19 *USPS Priority Mail Cutoff* *UPS 3-Day Select Cutoff*	20 ***Final Shopping Weekend*** *UPS 2nd Day Air Cutoff*
21 ***Final Shopping Weekend*** *USPS Mail Express Cutoff*	22 *FedEx Standard & Priority Overnight Cutoff*	23 *UPS Next Day Air Cutoff* *FedEx Same Day Cutoff*	24 **CHRISTMAS EVE**	25 **CHRISTMAS DAY**	26 **KWANZAA BEGINS** **BOXING DAY**	27
28	29	30	31	1	2	3

November 2025 **December 2025**

Key Calendar Differences: 2025 vs. 2024

	2024	2025	Strategic Impact
Shopping Days (Thanksgiving & Christmas)	27	28	Retailers have slightly more flexibility to space out promotions, optimize messaging cadence, and extend conversion windows.
Thanksgiving	Nov. 28 (late)	Nov. 27 (late)	2025 gains one more day before the end of November, giving more days in Cyber Week for sales to carry into the month-end.
Cyber Monday	Dec. 2	Dec. 1	This clean transition into December extends campaign momentum and potentially encourages longer promotional windows.
Hanukkah	Dec. 25 - Jan. 2	Dec. 14 - Dec. 22	The earlier holiday arrival shifts gift-buying activity into mid-December and aligns it more closely with Cyber Week promotions.
Christmas	Wed, Dec. 25	Thu, Dec. 25	The final weekend (Dec 20–21) will be a key in-store and last-minute ecommerce moment, with high-intent digital shopping likely to spike Mon–Wed (Dec 22–24) ahead of the holiday.

Source: PMG Mid-Year 2025 State of Retail

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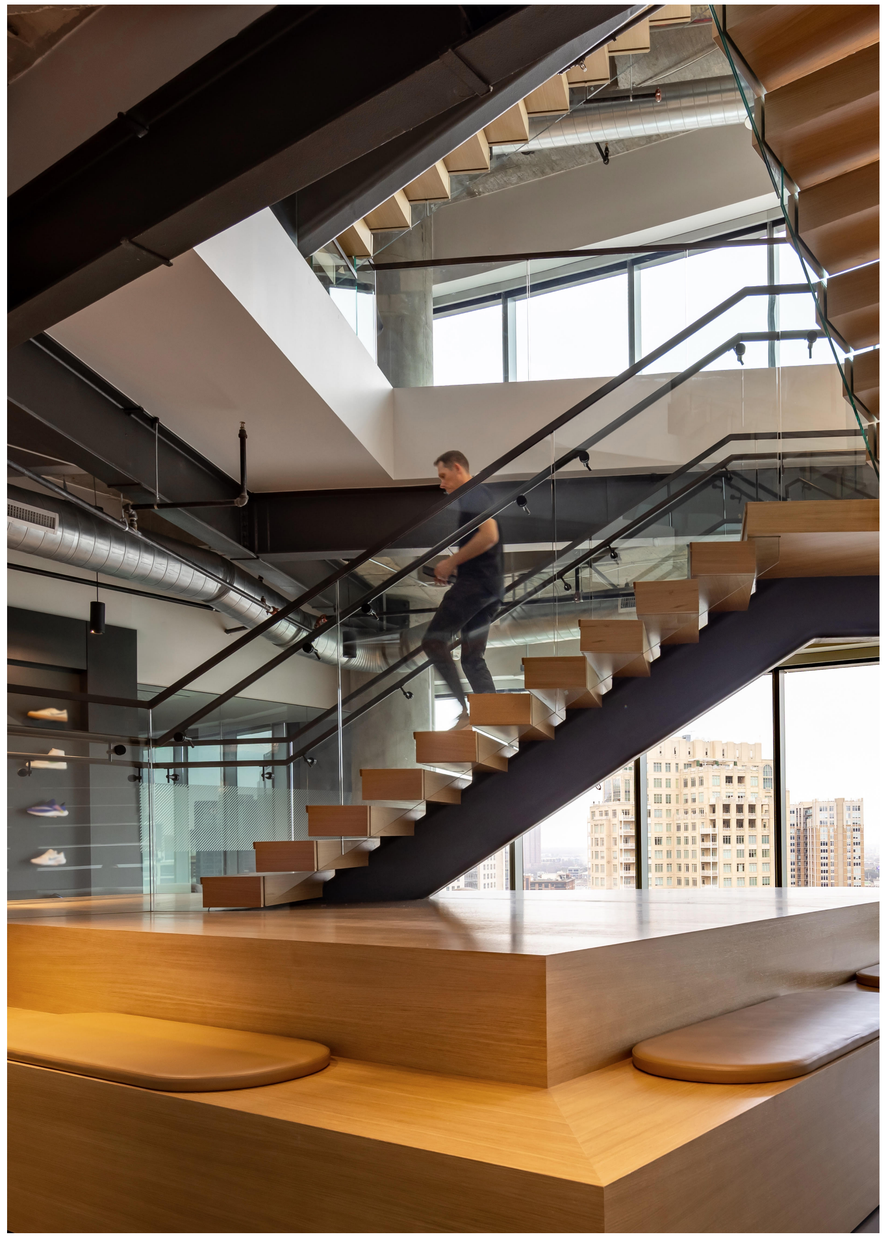
Key Takeaways From July Prime & Implications For H2 Planning

- **Align With Intent-Driven Moments**
  Prime Day's timing near July 4th likely pulled demand forward. Heading into holiday, consider how aligning with high-intent calendar moments can help accelerate conversion.
- **Sustain Visibility Across Longer Promotional Windows**
  Prime performance rebounded late in the event after mid-cycle dips. Driving engagement across extended shopping periods will be critical to converting cautious browsers.
- **Adjust Discount Strategy to Match Shopper Expectations**
  On Amazon, more products were on sale, but discount depth declined and sales still grew. Strategic discounting and messaging that meets shoppers where they're looking, without relying solely on deeper cuts, will be critical for major shopping events throughout the rest of the year.
- **Tailor Messaging to a More Selective Shopper**
  Clicks rose (+10% YoY) while conversions fell (-14%), showing heightened interest but slower decision-making. Messaging that clearly communicates product benefits and urgency can help nudge intent toward action.
- **Prepare for Heightened Competition**
  As cross-browsing and purchasing increases and holiday draws near, assume your shoppers are browsing elsewhere, and make the case for conversion in your own environment.

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