Prime Day in Real Time: Why Hourly Optimization Beats Daily Reporting

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If your Prime Day results feel tighter than last year, you're seeing what our preliminary data from the first two days confirms: the 2026 summer sales season is more competitive. Conversion rates are under pressure, advertising costs are climbing, and impressions are down even with stable budgets.

It's a tough market, but a revealing one. Brands that use real-time data to spot what's working and move budget toward it are still turning a profit.

Better still, the window to adjust hasn't closed yet.

So let's dig into the data and optimize for the final push.

Challenges and Opportunities Across Retailers

A clear pattern has emerged across Amazon, Walmart, and Target this season: better strategy is beating bigger budgets, and that's unlikely to change.

Most of Amazon's leading categories are facing ROAS headwinds, but the most profitable ones, Sports & Outdoors and Patio, Lawn & Garden, show that category fit and timing matter at least as much as discount depth. Toys and Games show the opposite, the cost of putting money in the wrong place: brand average daily spend rose 24% YoY while ROAS fell 44.4% versus 2025.

Amazon's EU data suggests teams there are already pulling back, cutting spend 15.7% YoY as sales fell 22.6% over the same period. In the US, Walmart's aggressive discounting and Target's softer conversion rates point to a broader reset in what brands expect promotions to deliver.

Click-through rates have stayed strong on Amazon, though. Sponsored Brands CTR improved 10.9% YoY, and search data from the first two days of Prime Day shows customers deliberately building carts, likely holding out for steeper Day 4 discounts before they buy. We saw the same pattern last year, when Amazon first moved to a 4-day event. Shoppers aren't hesitant so much as patient, waiting for the best price, and brands that read this correctly and tune their bids, creative, and retargeting for the final push should see real uplift.

> "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

YoY Change	Amazon	Walmart	Target
CPC	+5.9% (SP); +6% (SB)	+11.2% (SP); +3.4% (SB)	-15.3%
CTR	+6.3% (SP); +14% (SB)	+14% (SP); +68% (SB)	+100%
Brand Avg. Daily Spend	+4% (SP); -3.4% (SB)	+30% (SP); +8.4% (SB)	+1.24%

Source: Pacvue Amazon (US), Walmart, and Target Preliminary Prime Day Data through 6/25/26

8 Market Dynamics Reshaping This Summer Sales Season

1. Shoppers Are Taking Longer to Decide

Our preliminary data shows many brands seeing a dip in conversions despite steady traffic and strong click-through rates. Shoppers are spending more time in consideration than in past years, searching across retailers for the best deals, and conversion rates have fallen as a result. The longer promotional window doesn't help: 4 days for Amazon and Target, and a full week for Walmart, gives bargain hunters every reason to wait.

2. Daily Deal Rotation Drives Repeat Visits

Amazon's daily rotations encourage multiple smaller purchases rather than one large one. That's good for customer lifetime value during the event, but it changes the goal from converting once to staying competitive across every rotation. Brands end up bidding across multiple windows, which splits their budgets and adds complexity.

3. Brand-Tier Discount Dynamics

Premium brands like Apple can lock in top placement with modest discounts (10 to 15% off), while mid-tier and emerging brands have to cut much deeper (40% or more) to get the same visibility. The result is a two-tiered market where discount depth tracks brand equity rather than product quality, and that puts more margin pressure on non-premium brands.

4. Misleading Discount Claims Require Verification

Amazon's pricing enforcement has loosened, which leaves room for inflated discount claims. We've seen "60% off" that works out to a $4 price cut. Not surprisingly, savvy shoppers are turning to outside tools to check whether a deal is actually a deal.

5. Badge Language Confusion Impacts Conversion

Shoppers are seeing "Limited Time Deal" and "Prime Day" badges used inconsistently across the same event, which creates confusion. The badge seems to affect conversion, but advertisers don't have a clear read on how. One campaign gets one badge while a competing product gets another, so brands run extra tests and spend more without much guidance to show for it.

6. Social Proof and Influencer Discovery

Influencer credibility has become a major way shoppers discover deals, with influencer-curated picks and "Seen on Social" carousels showing up in prominent search and homepage spots. Paid search and affiliate marketing alone no longer cut it, because off-platform social activity increasingly drives on-platform performance.

7. Seasonal Trends Drive Category Performance

As the weather warms up, demand shifts toward outdoor gear, beach products, and other summer staples. Energy and hydration drinks are having a moment too, with Monster, Bang, and Liquid Death bidding for top Prime Day placements after sitting out the last few events. CPG and pet supplies are overperforming as well, helped by predictable purchase cycles and low shopper friction, while furniture and toys lag. Not every category performs the same during these events, and seasonal relevance often matters as much as the discount itself.

8. AI Plays a Supportive, Not Executive Role

Shoppers want AI to assist with their shopping, and sometimes guide it, but not to run it for them. Rather than handing off to autonomous shopping agents, people are using AI to compare products and prices or surface alternatives while keeping the final decision for themselves. Brands that bet on fully automated, AI-driven buying risk missing the conversion signals that still come down to human judgment.

Where's the Real Pressure Coming From?

Three headwinds are hitting at once.

First, Walmart is getting more aggressive, discounting key items hard to undercut Amazon while pushing brands to advertise more on its platform. As brands lose Buy Box ownership to Walmart, they raise their Amazon bids to win back visibility.

Second, a lot of shoppers don't seem to realize Prime Day is even happening this week, and the same goes for Walmart Deals and Target Circle Deals. The event is running a month earlier than usual, so it may have slipped past them, especially with so much attention on the World Cup.

Third, Grocery and CPG won the first couple of days, a sign that shoppers are moving away from discretionary buys toward household staples. Almost 70% of items sold during Prime Day so far have cost under $20, according to Numerator, which has likely pulled impressions away from pricier categories.

Together, these forces have brands spending just to hold position rather than to grow. Eligibility and badging issues are also pushing spend toward display ads, which tend to convert worse than search placements.

How to Win Friday and the Final Days

There's still time to adjust before this summer sales period wraps up.

Search data shows shoppers building carts, which suggests Day 4 could bring a wave of conversions as they finally check out. Teams that plan for this have a real shot at recovering the sales they missed earlier in the week.

Here's what winning teams are doing:

Audit and Reallocate

Find your worst performers in real time. If a category is down 12 or more ROAS points or seeing a CVR drop over 30%, pause or cut spend right away and move that budget to your top three or four performers. Grocery & Gourmet Food, Sports & Outdoors, and Patio, Lawn & Garden are carrying the load, so put your money where it's working.

Refresh Audience and Creative

CVR declines across most categories point to audience fatigue or stale creative. Test new audience segments, refresh your best creative, and try messaging built around trust signals (reviews, guarantees, fast shipping) rather than discount depth. Conversion is about confidence, not just price.

There's also a big gap between curiosity and conversion. Major brands like Nike rank #1 in search but fall outside the top 20 in actual purchases, while niche brands like Medicube and Ovala convert well above their search rank. If you're a high-search, low-purchase brand, use Sponsored Display retargeting to win over the high-intent shoppers who clicked but didn't check out. If you're already converting efficiently, put more budget into brand defense and category keywords where competitors are losing momentum.

Lean Into Social

If you have influencer partnerships or social assets, push them now. Put budget behind promoted posts, TikTok Shop, and social commerce if you haven't already. The brands winning through Friday and the weekend are the ones turning off-platform discovery into on-platform conversion.

Optimize for Buy Box and Inventory

Brands are turning off non-deal ASINs to save budget for promotions, so make sure you're not bidding against yourself. If inventory is tight, protect your most profitable deals and ease off the less efficient ones. Right now, Buy Box ownership matters more than volume.

Capitalize on Generic Search

Amazon data shows 74 to 76% of all search volume is generic or unbranded (swimwear, sandals, 4th of July outfits, and so on), up from 73.8% on Day 1. That's a big conquest opportunity. If most of your Sponsored Products budget sits on branded terms, you're missing the bulk of Prime Day traffic. Move ad dollars toward high-volume, generic category keywords, where brand switching is highest. Shoppers are thinking in categories more than brands right now.

Test Dayparting and Bid Strategies

Friday evenings and weekend mornings can bring different behavior than mid-week, so test higher bids on your top performers in those windows. Use rules-based automation to raise bids on high-converting audiences and pull them back on underperformers automatically. At this scale, managing it all by hand will slow your team down right when speed matters most.

Real-Time Optimization Isn't Optional Anymore

The brands succeeding this week have one thing in common: they're making decisions daily, sometimes hourly.

Manual optimization is too slow. Rules-based automation that watches ROAS, CVR, CPC, and impressions and adjusts bids, budgets, and audiences in response is now the baseline, not a bonus.

Brands using Pacvue's real-time optimization have a structural advantage here. Instead of waiting on daily reports to surface problems, they're checking performance every hour, catching underperforming categories or audiences, shifting spend to winners, and adjusting bids against live KPI thresholds.

During Prime Day, that edge compounds by the hour. Slow decision cycles cost real money every day, and there are only a few days left to make the most of this season.

What's Next?

This year's Prime Day is changing how retail media gets judged. Brands that expected steady growth and little operational overhead are finding that winning a category now takes speed and precision, not set-and-forget tactics.

The good news is that the data is there to guide you. With a clear read on what's working and what isn't, you can use these final days to test, learn, and adjust. If you're seeing ROAS declines, audience churn, or impression shortfalls, those signals can sharpen your budget decisions for Q3 and the next big event, Cyber 5.

The brands and agencies that win Prime Day care about learning as much as selling. They spend the event studying trends, use real-time data to win Friday and the weekend, then carry those lessons into their next campaigns.

That's where Pacvue helps. As the AI-Powered Commerce Media OS, Pacvue brings planning, activation, and real-time optimization together across 100+ retailers. See your full portfolio in one place. Monitor ROAS, CVR, and CPC in real time. Set rules that adjust bids, budgets, and audiences against live KPI thresholds. And tie your ad performance to downstream signals like inventory, Buy Box, and reviews, so every dollar maps back to real business impact.

This summer sales season is competitive and unforgiving. But it's also an opening for teams willing to move fast and operate with precision.

Ready to see how Pacvue can help you optimize the rest of Prime Day and beyond? Book a demo or explore how Pacvue runs retail media at scale.

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