



1H 2025 Amazon Retail Media

An inside look at how brands are showing up at the leading retail media network



Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business

L'ORÉAL



Google



petco



amazon



Walmart



Microsoft

SEGA

dyson



depop



Meta

OUTFiT7

Gett.



Alibaba

POPEYES

Tencent 腾讯



P&G



Johnson & Johnson



Revolut

Note: Top publishers by app store revenue | Source: Sensor Tower

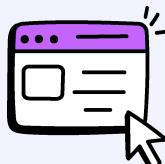
Amazon Retail Media

Key Takeaways



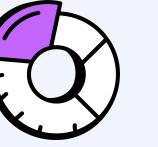
Amazon Led on Scale, Especially in Advertiser Count

Amazon received far more ad spend than any other retailer in 1H 2025, but its real strength was in attracting over 9,500 advertisers, nearly 9x more than the next closest retailer.



OnSite Display Dominated Amazon's Media Mix

Advertisers prioritized OnSite Display at a far higher rate than any other retailer, suggesting that Amazon is primarily being used to drive lower-funnel conversion.



CPG Essentials and Tech Brands Drove the Majority of Investment

Top advertisers included Samsung, Unilever, and L'Oréal, with most spend concentrated in core categories like personal care, electronics, and food & beverages.



Most Ads Followed a Familiar, Conversion-Focused Formula

Most creative was fairly homogenous, often featuring discounts, coupons, and a “Shop Now” CTA, reinforcing a performance-driven approach.



Monthly Swings were Driven by Advertisers, Less Holiday Focused

Unlike other retailers pushing seasonal themes that are retailer-wide, Amazon's monthly ad spend swings were typically driven by individual brand campaigns.



Few Brands Embraced a Full-Funnel Strategy

Few advertisers activated across multiple channels or embraced upper-funnel objectives, leaving room for brands to differentiate with more holistic campaigns.

Table of Contents

Key Takeaways	03
Introduction	05
Sensor Tower's Retail Media Insights	06
Contextualizing Amazon's Scale	07
Top Advertisers & Categories	11
Activation Strategies at Amazon	15



This report is your inside look at Amazon's retail media landscape

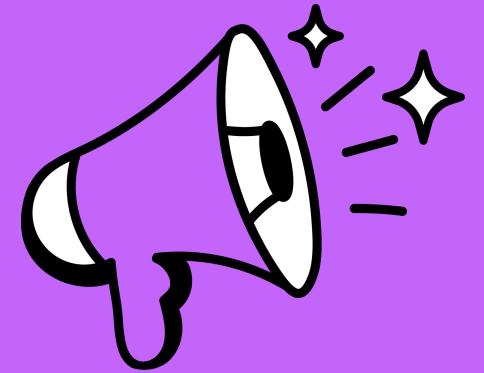
Retail media is the fastest growing force in digital advertising, and Amazon is at the forefront, with ad spend that far outpaces all other retailers.

Using data from Sensor Tower's Retail Media Insights, this report explores how advertisers are showing up at Amazon, including the channel and creative strategies they're using to drive performance. Whether you're evaluating retail partners or looking to optimize your efforts at Amazon, these insights will help you understand Amazon's role in today's media plans and identify where new opportunities may lie.

We'll take a closer look at:

- Amazon's scale relative to other RMNs
- Top advertisers & categories
- Channel mixes
- Creative strategies
- An early look at Prime Day advertising
- And more!

Are you ready to unlock the full potential of retail media at Amazon?



Sensor Tower's Retail Media Insights

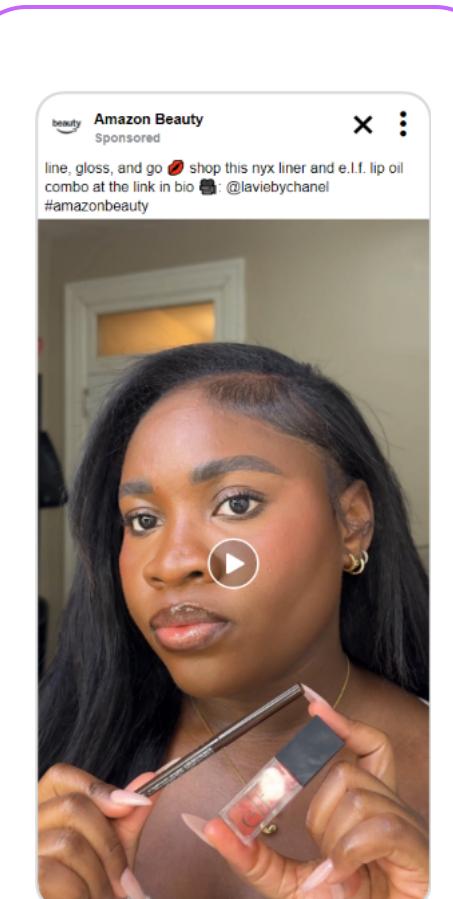
Retail Media Insights is the first and only ad intelligence product to measure co-branded advertising on retail media, solving a critical blind spot for marketers.

[Learn More & Request a Demo Here](#)

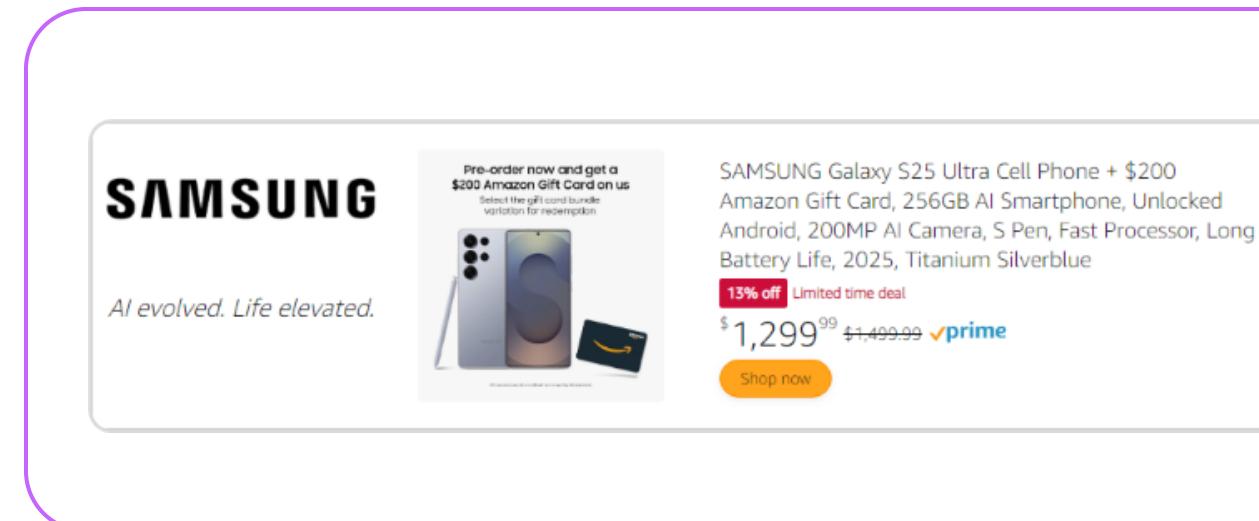
About this Data

This report is powered by Sensor Tower's Retail Media Insights, a marketing intelligence product that provides full visibility into the co-branded digital advertising ecosystem and retail media networks. Customized marketing insights reports empower brands with a view into spend, media mix, impressions and share of voice for display, video, mobile, OTT, and paid social across their selected retail partners and competitors.

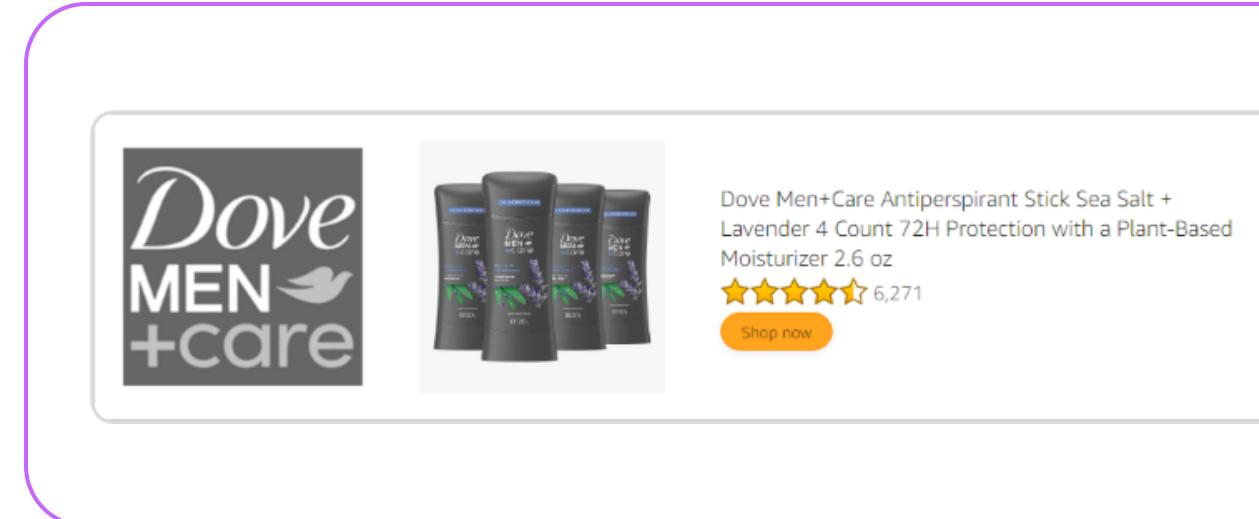
Co-Branded Advertising Examples



Retailer: Amazon
Advertiser: L'Oréal



Retailer: Amazon
Advertiser: Samsung



Retailer: Amazon
Advertiser: Dove

Contextualizing Amazon's Scale

Top Retail Media Networks

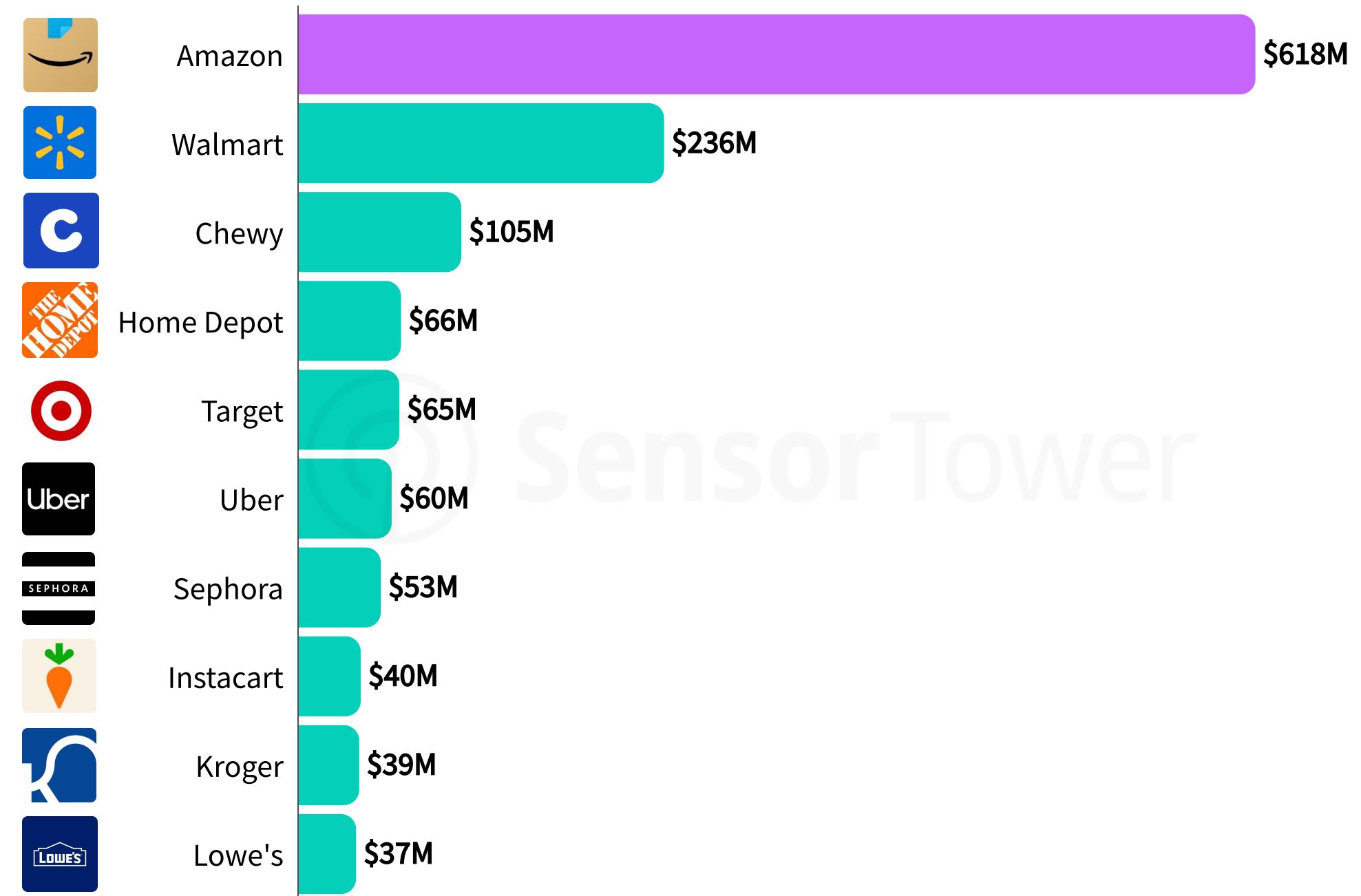
In 1H 2025, Amazon captured over 2x the ad spend of any other retailer

Amazon was the top-performing retail media network (RMN) by a wide margin in 1H 2025, receiving a total of \$618M in advertising spend. That's more than double the amount received by Walmart (\$236M) and nearly six times the total investment at Chewy (\$105M), the 2nd and 3rd ranked retailers.

The remaining list of top retailers each brought in less than \$100M during the same period, highlighting the remarkable scale of Amazon's market position.

Top RMNs: Jan-Jun 2025

Retail Media Spend, Top 8 Shown, US Only



Source: Sensor Tower's Retail Media Insights

Note: Excludes cases where the retailer is advertising for its own brand

Number of Advertisers

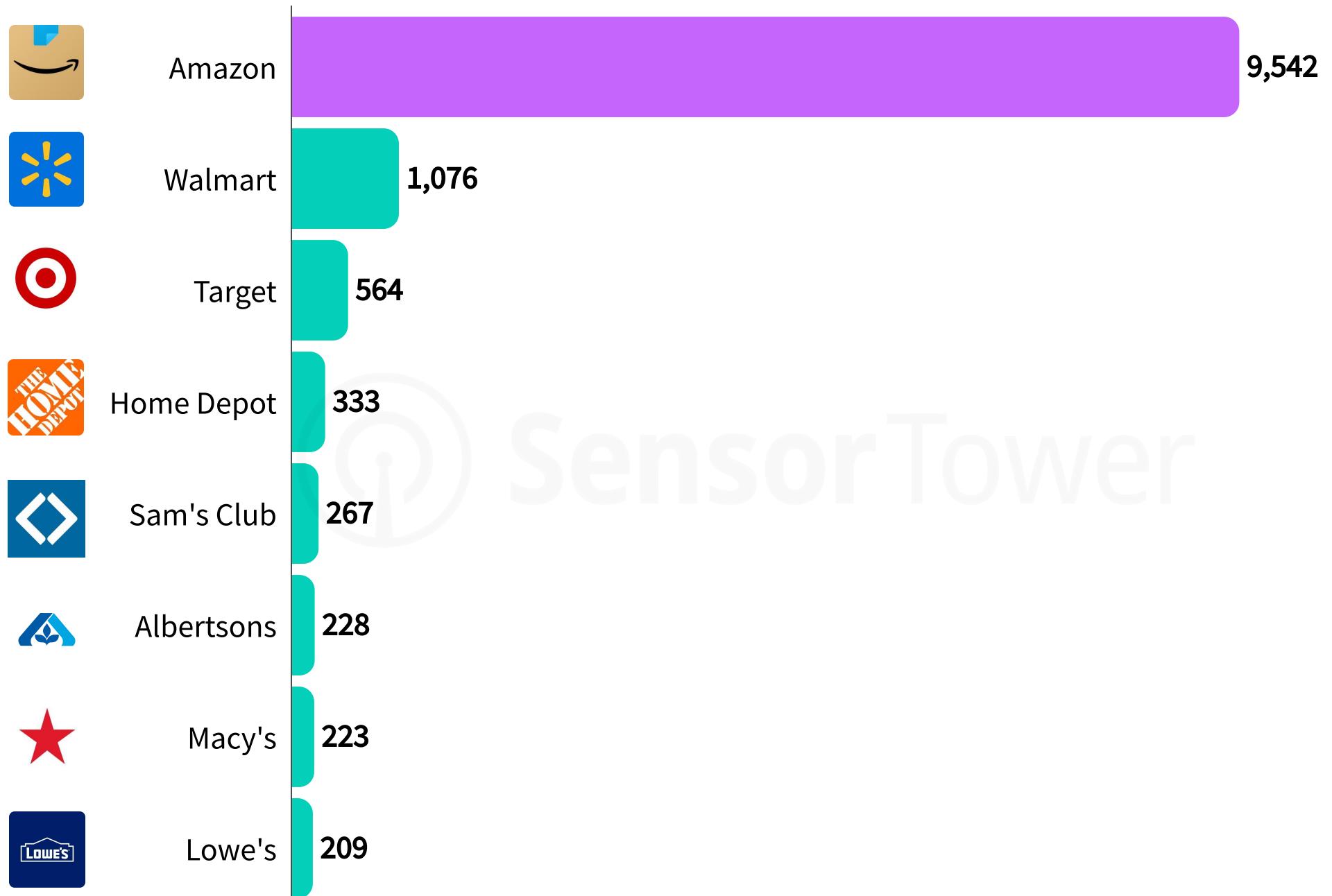
Amazon's lead was even larger when it comes to volume of advertisers

While Amazon led all retailers in ad spend during the first half of the year, their dominance was even more pronounced when viewed through the lens of advertiser count.

In 1H 2025, 9,542 unique advertisers ran campaigns on Amazon, nearly 9 times more than Walmart, who saw the second-highest total at 1,076. Big box retailers ranked high, benefiting from their broad coverage across product categories.

of Advertisers by Retailer

January-June 2025, Top 8 Shown, US Only



Source: Sensor Tower's Retail Media Insights

Note: Excludes cases where the retailer is advertising for its own brand

For most top advertisers, Amazon was *not* the primary retail partner

Interestingly, while Amazon led the industry in total ad spend, they were rarely the top retail partner for leading advertisers.

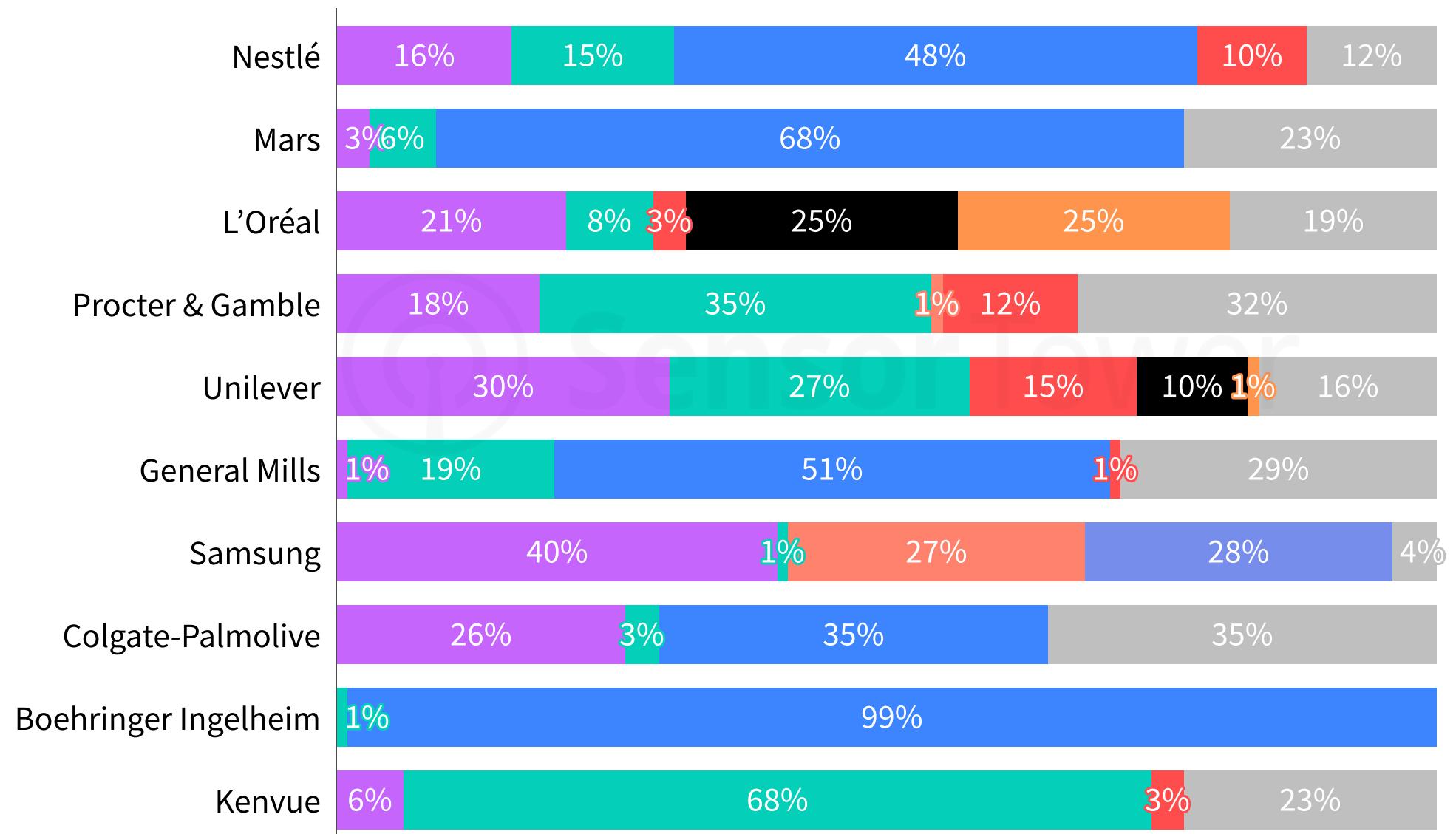
Nestlé, for example, dedicated only 16% of their industry-leading spend to Amazon, while allocating nearly half to Chewy. Similarly, L'Oréal prioritized Sephora & Ulta, and P&G leaned more heavily into Walmart.

While Amazon remains an important part of the mix, likely for driving conversion, this data suggests that Amazon is not necessarily at the center of most brands' broader retail media strategy.

Share of Wallet (SOW) by Retailer

% of 1H 2025 Retail Media Spend, Top 10 Advertisers Shown

● Amazon ● Walmart ● Chewy ● Home Depot ● Target ● Sephora
● Best Buy ● Ulta ● Other



Source: Sensor Tower's Retail Media Insights

Note: Excludes cases where the retailer is advertising for its own brand

Top Advertisers & Categories

In 1H 2025, CPG and tech brands led the charge at Amazon

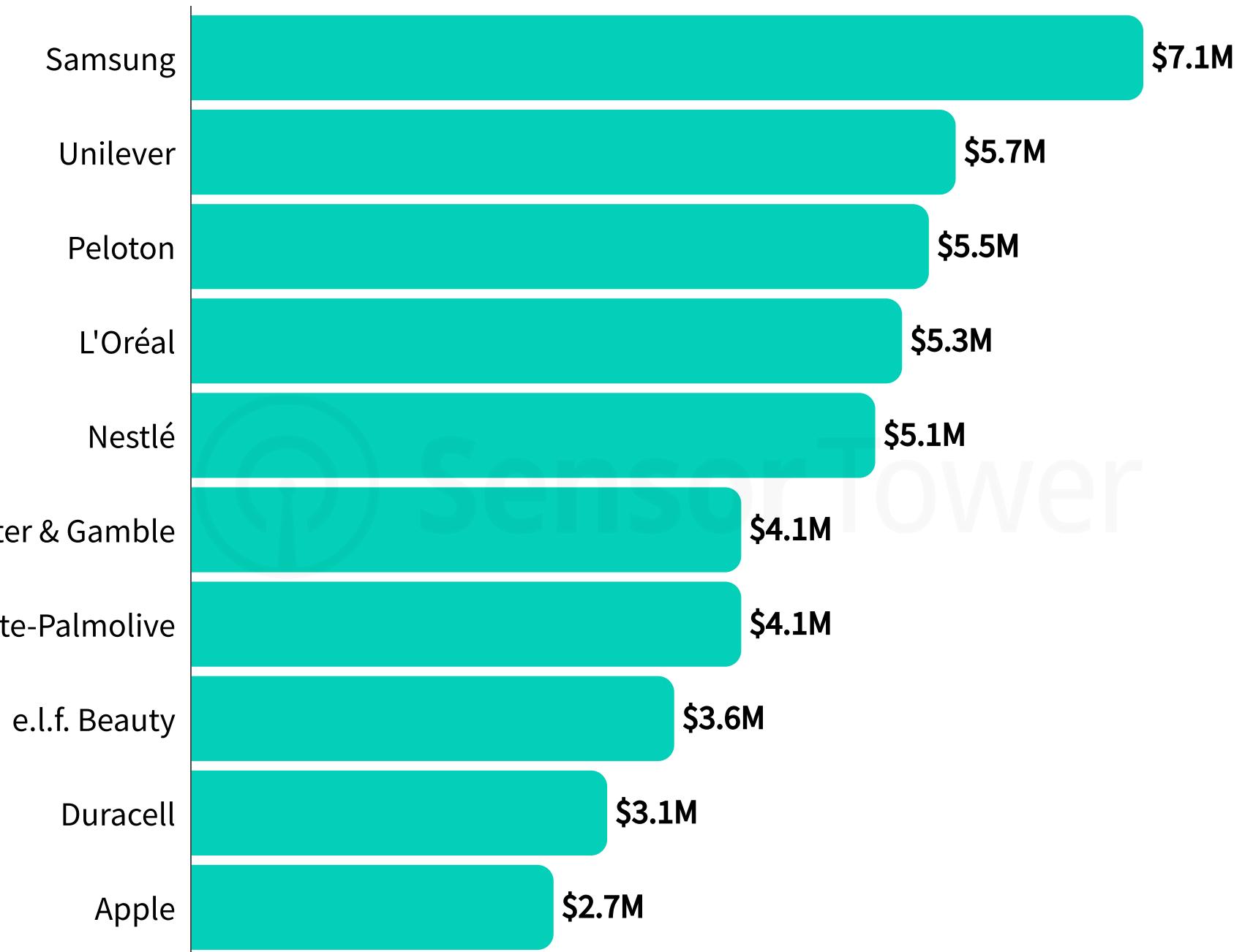
Amazon's top advertisers in the first half of 2025 reflect the retailer's wide category appeal. Samsung topped the list with \$7.1M in ad spend, as they promoted everything from Galaxy devices to gaming monitors and TVs. Unilever followed at \$5.7M, led by a \$2.2M campaign for Dove.

The remaining list of top spenders featured several large CPG companies, like L'Oréal, Nestlé, Proctor & Gamble, and Colgate, who all used Amazon to promote a wide range of products.



Amazon: Top Advertisers

Jan-Jun 2025 Retail Media Spend, Top 10 Advertisers Shown



Source: Sensor Tower's Retail Media Insights

Note: Excludes cases where the retailer is advertising for its own brand

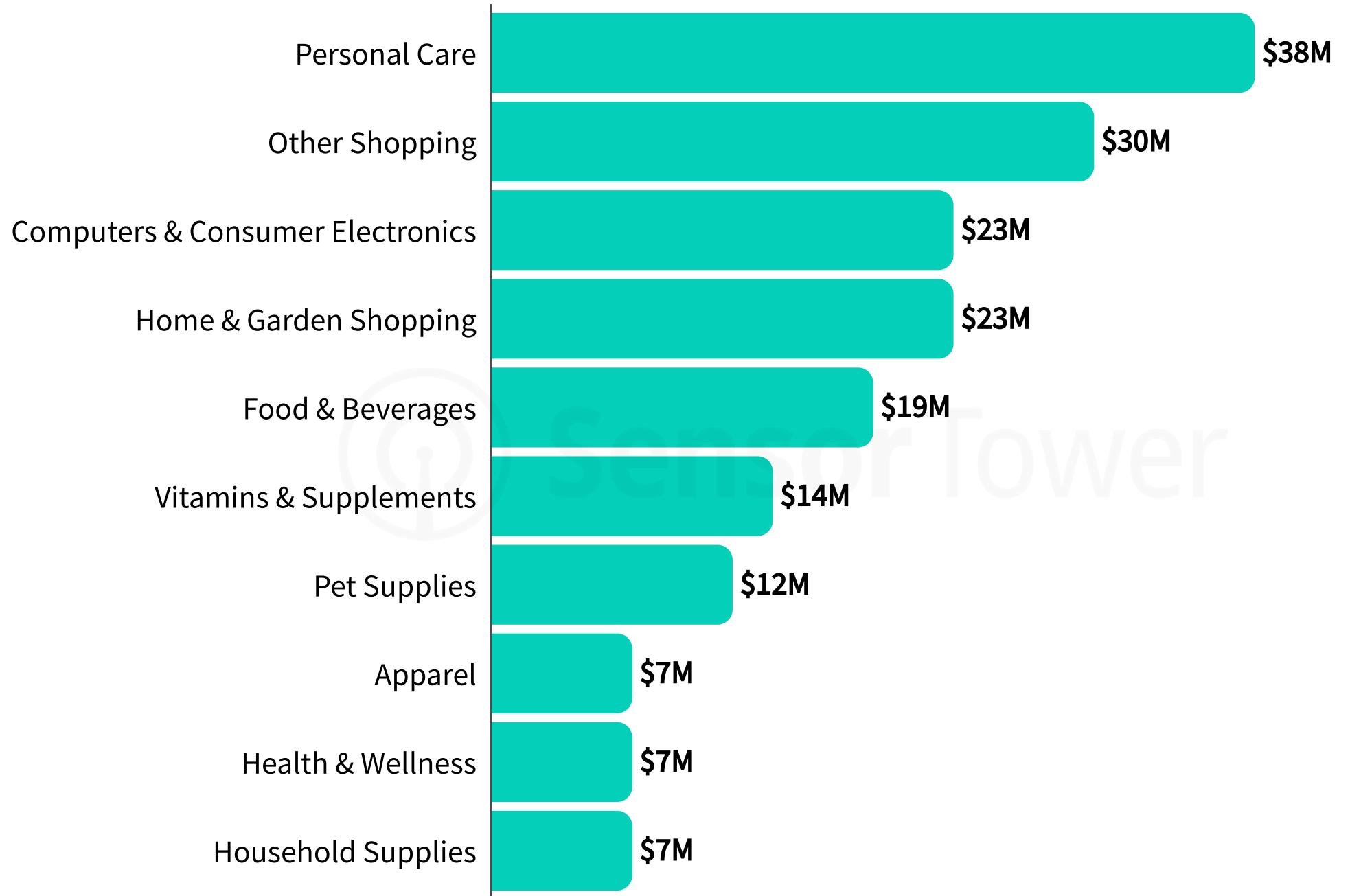
The top categories at Amazon reflect both everyday essentials and bigger-ticket tech

In 1H 2025 at Amazon, Personal Care led all categories with \$38M in ad spend, driven by campaigns from brands like L'Oréal and Colgate. Computers & Consumer Electronics ranked third at \$23M, led by Samsung and LG. Overall, the top categories primarily represented a mix of personal and household staples.



Amazon: Top Product Categories

Jan-Jun 2025 Retail Media Spend, Top 10 Categories Shown



Source: Sensor Tower's Retail Media Insights

Note: Excludes cases where the retailer is advertising for its own brand, where the product is unidentifiable, or the advertisers are not currently tracked by Sensor Tower

Monthly fluctuations at Amazon tend to be campaign-driven, rather than based on holidays

At Amazon, monthly spend fluctuations tend to be driven by individual advertiser campaigns, rather than retailer-wide seasonal pushes, like what we often see at Walmart and Target surrounding key holidays.

In January, for example, L'Oréal ran a winter-focused skincare campaign for CeraVe, driving a spike in the Skincare category. In March, Vital Essentials promoted a spring sale on dog treats, increasing Pet Supplies. Also in March, Home & Garden spend jumped when Fiskars launched a \$1.2M campaign for spring yard cleanup.

While some subtle seasonal themes were present, month-to-month changes were most often brand-led, rather than part of a larger effort from Amazon.

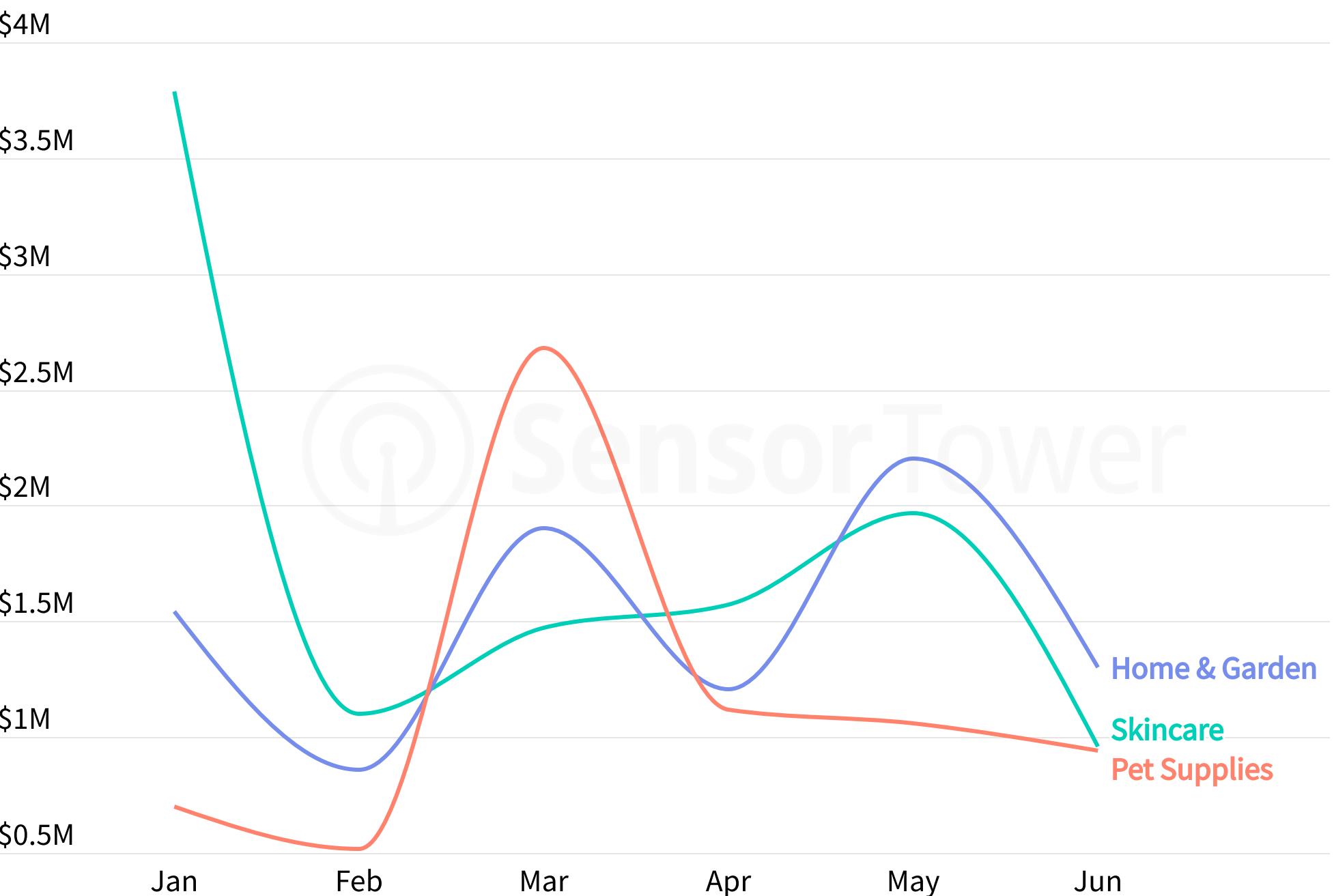
Source: Sensor Tower's Retail Media Insights

Note: Excludes cases where the retailer is advertising for its own brand, where the product is unidentifiable, or the advertisers are not currently tracked by Sensor Tower



Seasonality at Amazon: Monthly by Category

Jan-Jun 2025 Retail Media Spend, Select Categories Shown



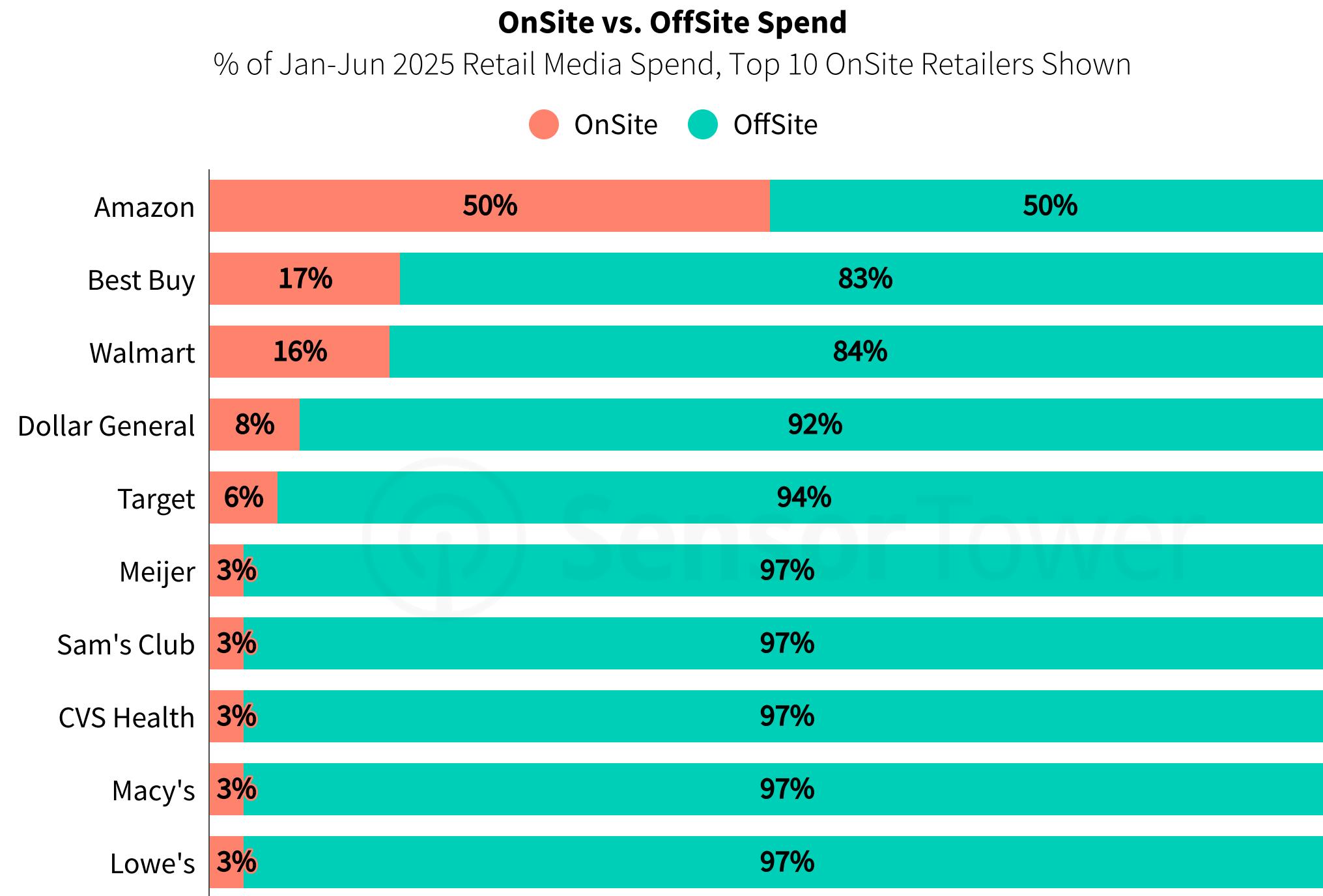
Activation Strategies at Amazon

Half of Amazon's spend occurred OnSite, far more than any other retailer

When advertising on retail media, brands can choose between OnSite ads that run on a retailer's owned properties and OffSite ads that appear on platforms like social media or OTT.

In 1H 2025, half of Amazon's spend ran OnSite, far more than any other retailer. This suggests that brands primarily view Amazon's RMN as a chance to connect with high-intent shoppers while they're actively browsing and buying.

Source: Sensor Tower's Retail Media Insights
Note: Excludes cases where the retailer is advertising for its own brand



Definitions:

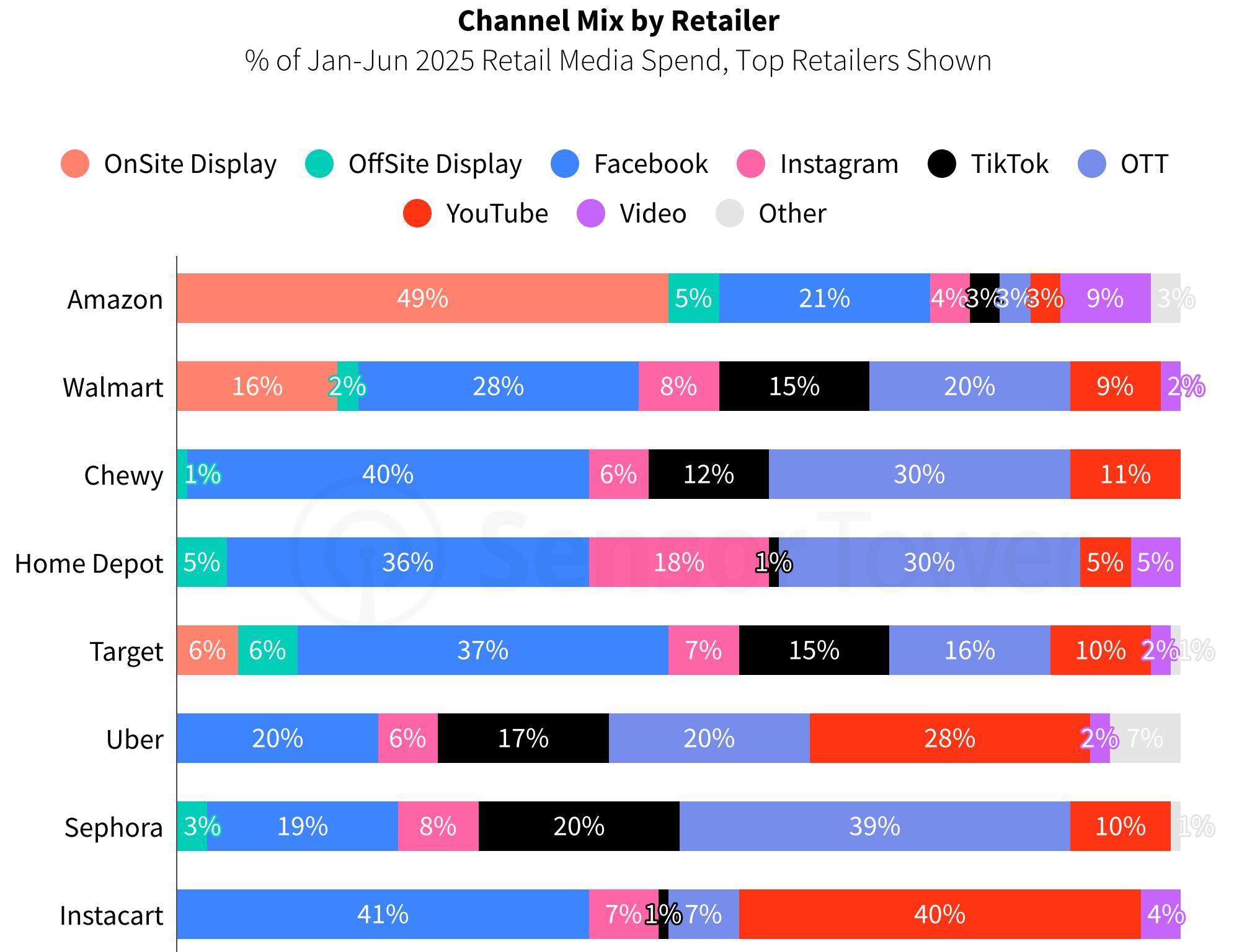
OnSite: Ads displayed on the retailer's website (for example, ads displayed on Walmart.com). Note that this includes onsite display only, not inclusive of search, sponsored results, or proprietary ad units per retailer.

OffSite: Ads displayed on other websites, social media platforms, or OTT. For example, this includes co-branded advertisements on Facebook, TikTok, and YouTube.

Channel strategies at Amazon often lacked the diversity seen at other retailers

When comparing the overall channel mixes at the 8 largest RMNs, Amazon stands out for their heavy reliance on OnSite Display, which accounted for nearly half of their advertising dollars. In contrast, advertisers took a more balanced approach at other retailers, distributing their investment more holistically across display, social, and video channels.

Overall, channel strategies at Amazon appear narrower and more conversion focused, compared to the more diverse mixes seen at other retailers.



Source: Sensor Tower's Retail Media Insights

Note: Excludes cases where the retailer is advertising for its own brand

Most Amazon ads followed familiar formats and messaging themes

The examples shown here represent the most common creative types that brands ran at Amazon, most of which were OnSite Display units focused on conversion. Advertisers typically used these placements to promote discounts, coupons, and subscription savings, often paired with a strong CTA like “Shop now.”

While these tactics align with Amazon’s strength to drive sales, the creative approach is fairly formulaic, which may present an opportunity for brands to differentiate through more storytelling, brand-building creative.

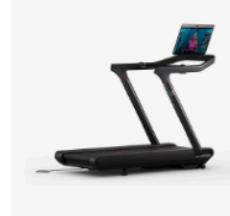


Amazon: Sample of Common Creative Formats

Select Examples Shown

SAMSUNG
AI evolved. Life elevated.

SAMSUNG Galaxy S25 Cell Phone + \$100 Amazon Gift Card, 128GB AI Smartphone, Unlocked Android, Night Video, 50MP AI Camera, Fast Processor, ProScaler Display, Long Battery Life, 2025, Icyblue
\$799⁹⁹ ✓prime
[Shop now](#)

PELOTON
Designed to Motivate, Top-Rated Treadmill

Peloton Tread | Treadmill for Running, Walking, an...
★★★★★ 83
8% off Limited time deal
\$2,745⁰⁰ \$2,995.00
[Shop now](#)

PURINA TIDY CATS
22lb DESIGNED FOR litter·robot®

PURINA TIDY CATS Multi-Cat Clumping Litter
SPECIALTY FORMULATED FOR THE PERFECT CYCLE™
\$18³³ \$19.30
[Shop now](#)

DURACELL
Duracell Coppertop AAA Batteries, 28 Count Pack Triple A Batte...
★★★★★ 5,556
[Shop now](#)

Dove
24Hr Lotion-Soft Skin
\$27⁴⁹ \$28.94 ✓prime
Save 5% with Subscribe & Save

[Add to cart](#)

OLAY
Invisible on all Skin

Olay Invisible Sunscreen, SPF 35, ...
★★★★★ 43
\$24.99 ✓prime
[Add to cart](#)

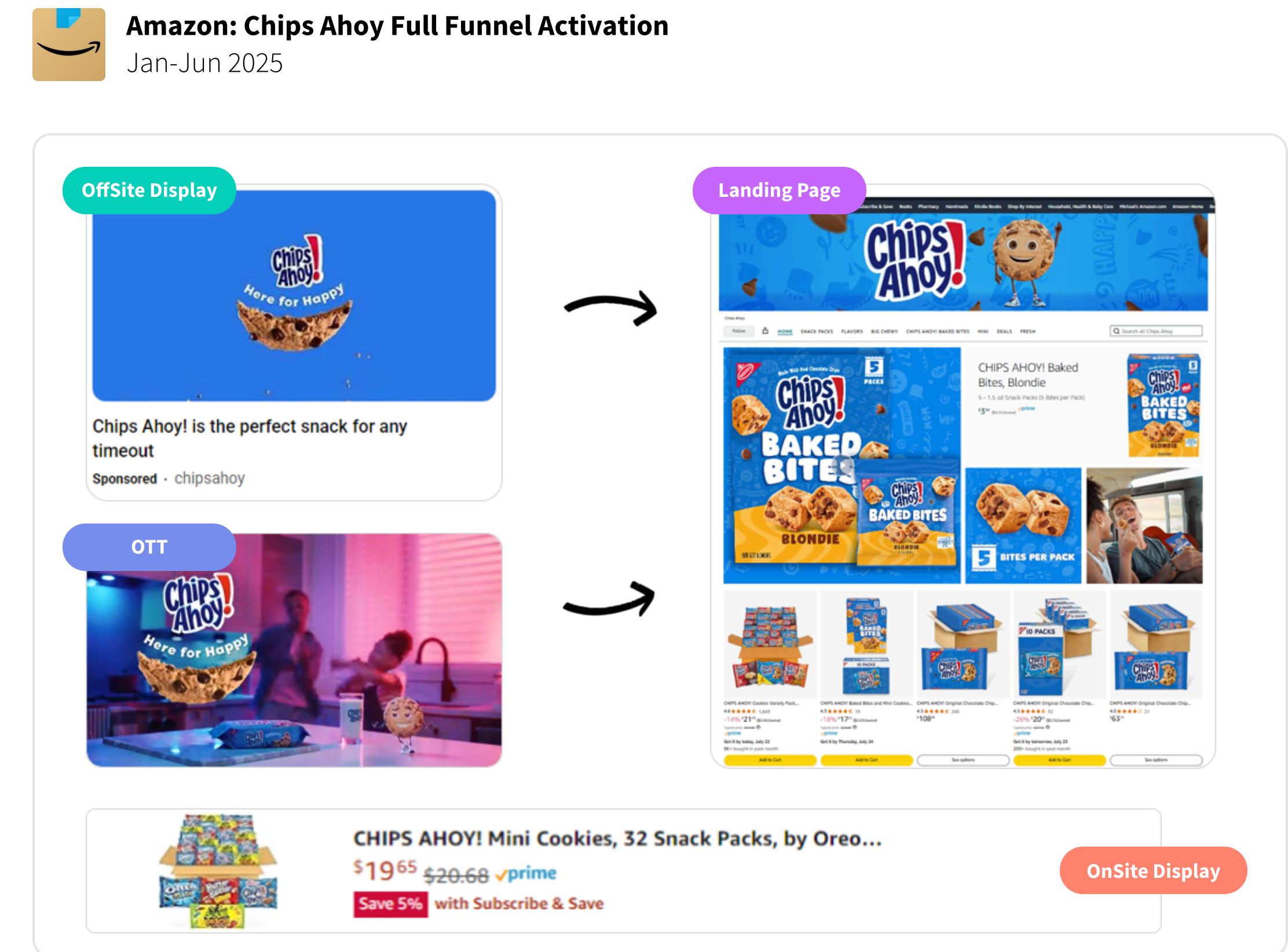
Source: Sensor Tower's Retail Media Insights

Note: Excludes cases where the retailer is advertising for its own brand

Chips Ahoy demonstrated what a full-funnel strategy can look like at Amazon

While most advertisers at Amazon focused on lower-funnel tactics, Chips Ahoy demonstrated how to execute a full-funnel approach within Amazon's RMN. Chips Ahoy shared a fun, engaging brand campaign with a tagline of "Here for Happy," using OffSite Display and OTT to reach audiences across the web and on streaming platforms. These branding ads drove to the general Chips Ahoy landing page at Amazon.com. They then followed through with OnSite Display ads driving to specific product pages to increase conversion.

While few advertisers took this type of multi-channel approach in 1H 2025, this Chips Ahoy example demonstrates how Amazon can support both brand-building and conversion, all within a single ecosystem.



Source: Sensor Tower's Retail Media Insights

Amazon launched early Prime Day ads in June, with little participation from outside advertisers

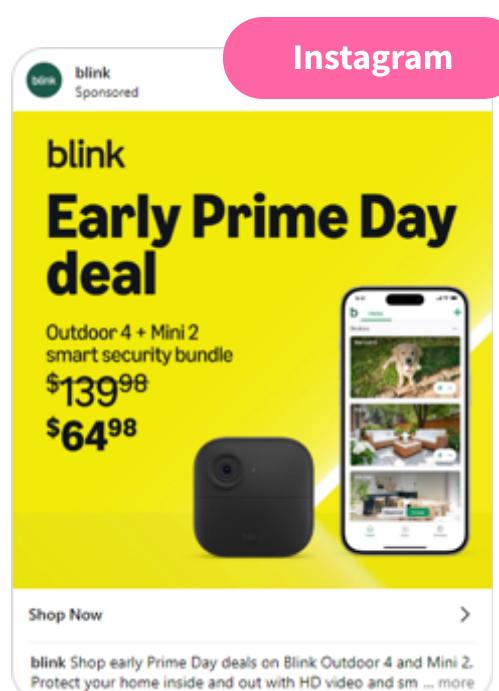
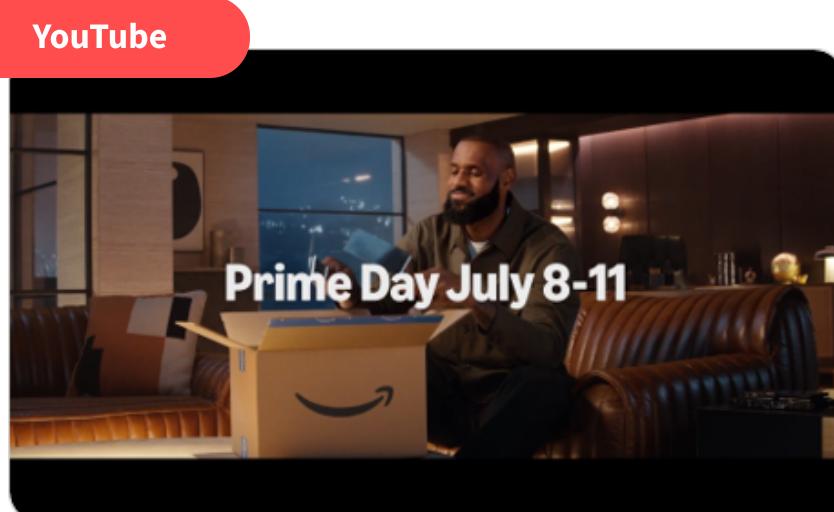
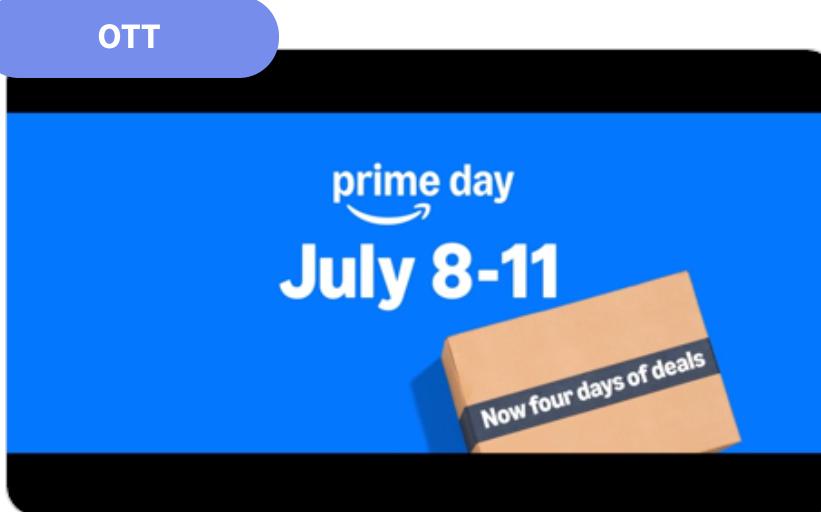
In the lead up to their Prime Day sales event on July 8-11, Amazon began building excitement in June with a “coming soon” campaign. Notably, the early efforts rarely included any specific brands or products. Instead, Amazon primarily featured their own brand while focusing their messaging on Prime Day itself.

The centerpiece was an OTT and YouTube campaign featuring Lebron James with the tagline “Prime Day is Coming.” Amazon also used OffSite Display to promote category-specific messaging around fashion, which included a small Adidas logo, one of the only appearances of a third-party brand. Amazon also promoted their Blink security lineup with a social campaign for “Early Prime Day Deals.”



Amazon: Prime Day Advertising

June 2025



Source: Sensor Tower's Retail Media Insights

Note: Excludes cases where the retailer is advertising for its own brand

Looking Ahead | Turning Insights into Action

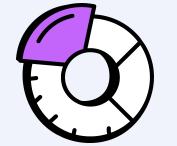
Now that you've explored how brands are activating on Amazon, here a few ways to turn those insights into a data-driven, effective retail media strategy:

Benchmark Spend Against Competitors



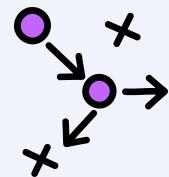
Analyzing competitor ad spend and flighting strategies at Amazon can help you set your budgets to stay competitive and capture share when it matters most.

Optimize Your Channel Mix



Use competitive data to understand where other brands are investing and explore how adding channels beyond OnSite Display could support upper-funnel objectives.

Differentiate Through Creative Strategy



Most ads at Amazon follow the same conversion-driven formula. Standing out with stronger brand-building could provide a competitive edge.

Lean Into Full-Funnel Activations



Most brands turn to Amazon for conversion, but there's opportunity to connect with consumers across the full-funnel, all while leveraging Amazon's first-party data.

Outsmart the Competition with Retail Media Insights

Sensor Tower's Retail Media Insights is your secret weapon for making data-driven decisions, measuring success, and staying ahead in a fast-moving industry.

[Request a demo!](#)



Sensor Tower

About Sensor Tower

Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world's digital economy, Sensor Tower's award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.

Press Inquiries: press@sensortower.com





Interested in our Retail Media Insights Solutions?

If you want to learn more about Sensor Tower, please request a demo:

[Request a free demo!](#)



Get the latest insights on our blog: sensortower.com/blog