Prepared for the Amazon growth conversation

Amazon Social Ads

EU5 Opportunity on X

Shopping interests, behaviours and sentiment toward Amazon among X users in France, Spain, the United Kingdom, Germany and Italy.

FR · ES · UK · DE · IT

CONTENTS

The conversation, in order.

HOW TO USE THIS

A 20-minute read for a growth conversation — not a media plan.

Every cut is GWI-verified or X-internal. Tone on the biggest posts is a creative brief, not a red flag: the critics still shop.

Sources on the closing method slide. Client-citable.

Help Amazon scope X users in each market.

Shopping interests, general interests, behaviours, and sentiment toward Amazon — among people already on X.

01

Who they are

Demography, generation, and the over-indexes most media plans miss.

02

How they shop

Visit, research, marketplace nativity, Black Friday intent.

03

How they spend

Prime Video, paid apps, AI tools, music — the bundle fit.

04

What they say

90 days of Amazon conversation: scale, and tone on the biggest posts.

Survey layer carries the trailing-12-month behavioural ask. Conversation layer is a 90-day read of Amazon talk on X.

Retention. Subscribers. Five tones.

01

Amazon already owns these audiences' habits

79.9–89.0% of X users in ES, UK, DE and IT visited Amazon in the last month. France is 73.9% — the lowest penetration, but the highest over-index (+13%). This is a retention-and-frequency audience, not an acquisition one.

02

X users are the paying-subscriber type in every market

AI-tool subscriptions over-index +68% to +144%. Paid apps +38% to +88%. Prime Video over-indexes everywhere (FR +45%, DE +25%, IT +18%). The bundle story — Prime + Video + Music — fits how this audience already spends.

03

The conversation is big, and its tone varies by market

The UK is the largest and warmest lane (228.8M market impressions, 40% positive on top posts). France is the loudest critic (20% / 53% on top posts). One creative system. Five different tonal briefs.

~48 million already visit.

48M

X users across FR, ES, UK, DE and IT visited Amazon in the past month.

A retention-and-frequency audience — not an acquisition one.

MARKET	VISITED LAST MONTH	INDEX	X USERS
IT Italy	89.0%	108	7.0M
DE Germany	84.3%	109	8.1M
UK United Kingdom	83.4%	109	15.2M
ES Spain	79.9%	111	10.6M
FR France	73.9%	113	7.5M

Index vs average internet user. Bar width = share of X users who visited Amazon last month. Largest audience by headcount: UK (15.2M).

GWI, explore-verified. X users in every market are more likely to be Amazon visitors than the average internet user. Combined reach ≈ 48M across the five markets.

Big talk. Uneven warmth.

MARKET	POSTS ENGAGED	MARKET IMPRESSIONS	TOP-POST SENTIMENT
UK Warm	1,532,154	228.8M	40% pos · 37% neg
FR Contested	1,056,599	124.5M	20% pos · 53% neg
ES Balanced	935,833	90.0M	33% pos · 37% neg
DE Mixed	1,027,983	65.8M	33% pos · 43% neg
IT Quiet	677,468	25.7M	27% pos · 37% neg

Sentiment on the biggest posts skews critical in every market except the UK. Top-post lanes are dominated by price and policy debates — the norm for mega-retailers on social. The buying behaviour says the critics still shop. Tone is a creative brief, not a red flag.

The paying-subscriber type.

AI-TOOL SUBSCRIPTIONS

+68% to +144%

Every market. The heaviest over-index in the set.

PAID APPS

+38% to +88%

Already in the habit of paying inside software.

PRIME VIDEO

FR +45% · DE +25% · IT +18%

The bundle is not a stretch. It is how they spend.

MUSIC STREAMING (UK)

43% · +47%

The UK’s transactional digital audience, in one line.

Over-indexes vs the average internet user in each market. Prime Video: France idx 145, Germany +25%, Italy +18%. The bundle story fits how this audience already spends.

United Kingdom

Largest and warmest lane of the five. A transactional digital audience already inside Amazon — the brief is frequency, not discovery.

83.4%	109	15.2M
Visited Amazon last month	Index vs avg internet user	X users reached

CONVERSATION · 15 MAY – 13 AUG 2026

228.8M

market impressions

Warm

40% pos · 37% neg

228.8M UK impressions of Amazon talk in 90 days — the largest and warmest lane of the five (40% positive on top posts).

BEHAVIOURS

61% male (+25% vs average internet user)

Gen Z 29.6% (idx 155) + Millennials 30.6% (idx 126) — 60% under 45

12% Black British (idx 197) — nearly 2× average, a reach story most media plans miss

59% prefer shopping online (+15%)

Music streaming subs 43% (+47%); paid apps 17% (+67%); in-app 13% (+72%)

AI-tool subs 10% (+111%); social-media subs 9.7% (+97%)

Lean into it. The conversation can carry brand heat.

France

Lowest penetration of the five, highest over-index. French X users are disproportionately Amazon people — and the loudest critics. Tone is the work.

73.9%	113	7.5M
Visited Amazon last month	Index vs avg internet user	X users reached

CONVERSATION · 15 MAY – 13 AUG 2026

124.5M

market impressions

Contested

20% pos · 53% neg

69% would consider purchasing from Amazon in the future (+17%)

BEHAVIOURS

52% prefer online shopping (+27%) — strongest preference over-index of the five

64% research products on retailer sites like Amazon (+12%)

Prime Video 41.8% monthly (idx 145, 4.1M users) — strongest Prime Video over-index

Music subs +74%; paid apps +88%; AI-tool subs +133%; in-app +126%

Answer price and labour critiques with owned narrative before campaigns.

Germany

The live-sport bundle angle is strongest here. Prime Video is not adjacent to the shop — it is the shop's stage.

84.3%
Visited Amazon last month

109
Index vs avg internet user

8.1M
X users reached

CONVERSATION · 15 MAY – 13 AUG 2026

65.8M
market impressions

Mixed

33% pos · 43% neg

74% would consider purchasing from Amazon in the future

BEHAVIOURS

Prime Video 51% monthly (+25%)

46% use Prime Video to watch sports (+33%) — the live-sport bundle angle

73% research on retailer sites (+19%)

61% prefer online shopping (+16%); 57% shopped or browsed in the last week

Live-commerce interest +64% if variety improves

AI-tool subs +144%; social subs +141%

Product-led content wins. Put sport and Prime on the same page.

Spain

The most marketplace-native audience of the five. Exclusive content and services already motivate purchase — Prime-exclusive framing belongs here.

79.9%
Visited Amazon last month

111
Index vs avg internet user

10.6M
X users reached

CONVERSATION · 15 MAY – 13 AUG 2026

90.0M
market impressions

Balanced

33% pos · 37% neg

90.0M ES impressions. 33% positive / 37% negative — the most balanced tone after the UK.

BEHAVIOURS

86% used marketplace apps (Amazon, AliExpress, eBay) in the last month

eBay 58.5% (idx 122) — verified, the most marketplace-native cut of the five

64% shopped or browsed online in the last week

45% pay for a movie/TV streaming sub (+19%)

Paid apps +38%; AI-tool subs +68%

Exclusive content/services motivate purchase (+37%)

Prime-exclusive drops. Same system, marketplace-native script.

Italy

Highest Amazon penetration of any market measured – and the quietest conversation. Seasonal moments are pre-sold. The headroom is the talk, not the habit.

89.0%	108	7.0M
Visited Amazon last month	Index vs avg internet user	X users reached

CONVERSATION · 15 MAY – 13 AUG 2026

25.7M

market impressions

Quiet

27% pos · 37% neg

71% would consider purchasing in future

BEHAVIOURS

73% say they will shop at Amazon during Black Friday this year (+28%)

Prime Video 59% monthly (+18%)

72% research on retailer sites (+11%)

60% prefer online shopping (+16%); 61% shopped or browsed last week

Movie/TV subs 45% (+27%); paid apps +57%; AI-tool subs +99%

Seasonal moments are pre-sold. Use X to amplify, not introduce.

04 · CREATIVE IMPLICATION

One system. Five scripts.

UK

Warm

The scale market

Lean into it. The conversation can carry brand heat.

40% pos · 37% neg

FR

Contested

The over-index market

Answer price and labour critiques with owned narrative before campaigns.

20% pos · 53% neg

DE

Mixed

The Prime market

Product-led content wins. Put sport and Prime on the same page.

33% pos · 43% neg

ES

Balanced

The marketplace-native market

Prime-exclusive drops. Same system, marketplace-native script.

33% pos · 37% neg

IT

Quiet

The highest-reach market

Seasonal moments are pre-sold. Use X to amplify, not introduce.

27% pos · 37% neg

Grounded in the cuts above.

01

Frequency and bundle, not awareness

With 74–89% monthly reach already, the X play is basket-frequency and Prime-bundle attach. Prime Video over-indexes in all five markets. In Germany the sports angle (+33%) gives the bundle a live-moment stage.

02

Five markets, five tones

UK warm — lean into it. France contested — answer price and labour critiques with owned narrative before campaigns. ES, IT and DE mixed — product-led content wins. Same system, different scripts.

03

Ride the commerce moments

Italy's 73% Black-Friday-at-Amazon intent (idx 128) says the seasonal moments are pre-sold on X. Spain's marketplace-native audience and exclusive-content motivation (+37%) fit Prime-exclusive drops.

Two layers. One read.

SURVEY LAYER

GWI

GWI Core (+ Pulse waves), docked to the X Monthly Users audience per market.

Waves Q4 2024 – Q2 2026 (Spain: Q2 2025 – Q2 2026).

Headline cuts explore-verified. Samples n = 9,427–19,702 per market for the Amazon-visit cut; smaller cuts as returned by GWI.

Survey-based, named source, client-citable. Carries the trailing-12-months behavioural ask.

CONVERSATION LAYER

X internal

X internal data. One global scan of Amazon terms: @amazon, @AmazonUK, @AmazonFR, @AmazonDE, @AmazonIT, @amazonES, amazon prime, amazon.

Window: 15 May – 13 August 2026 (90-day read). Conversation history is retention-limited; the 12-month lens is carried by the survey layer.

Impressions measured per market via engagement geo. Broad ‘amazon’ term includes Prime Video / AWS adjacent talk — disclosed by design, to capture the full brand surface.

Sentiment: Grok classification of each market’s top 30 posts by impressions. NSFW authors excluded.

Survey-based cuts are named-source and client-citable. Conversation history is retention-limited, so the 12-month lens is carried by the survey layer.

The audience is already yours.

The brief is frequency.

Basket-frequency and Prime-bundle attach, written five ways. UK warm. France contested.
Spain exclusive. Germany live sport. Italy seasonal.