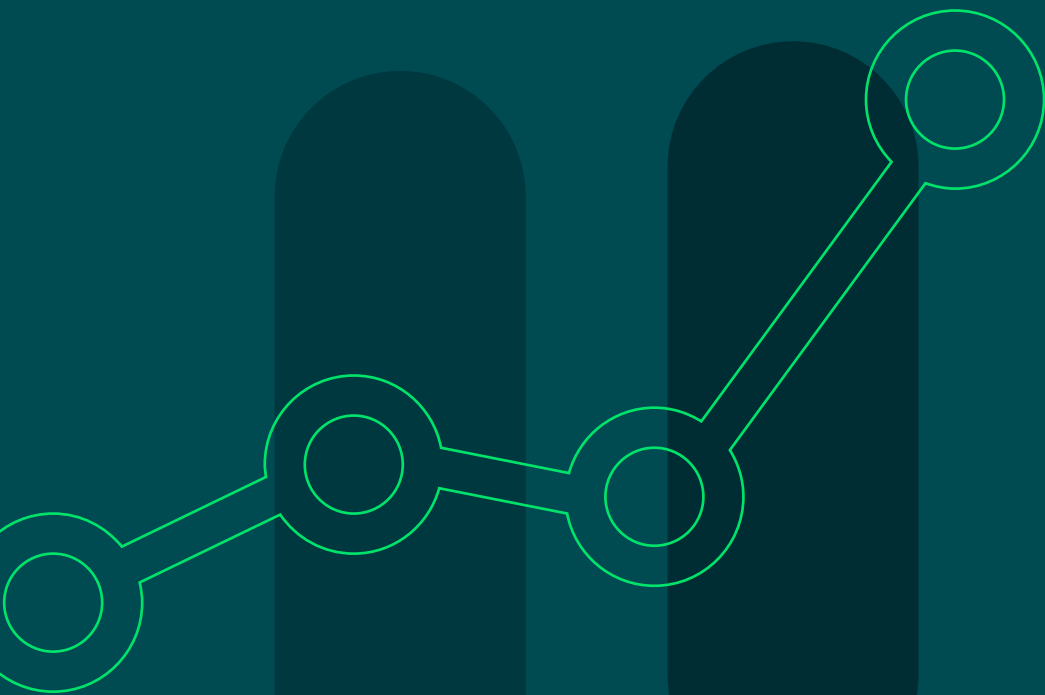




2020

Amazon Prime Day Recap

Comprehensive insights into
the annual ecommerce event



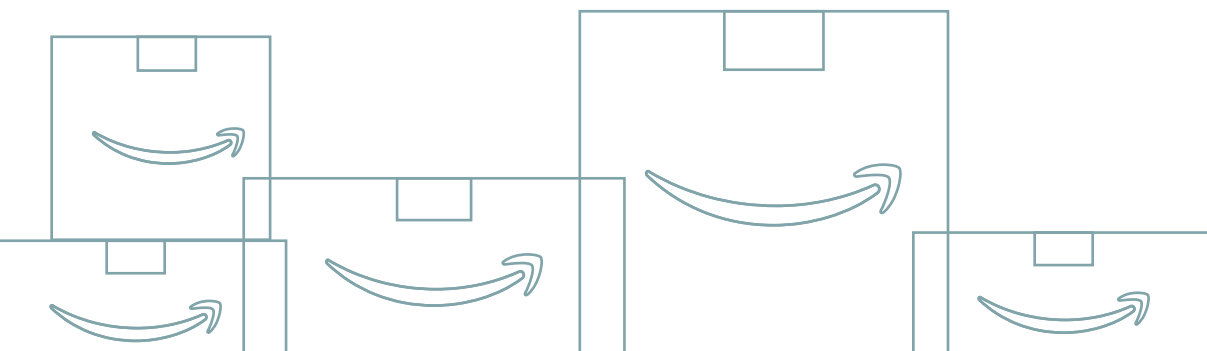
What's Inside



Prime Day Highlights	03
Top Items & Categories	04
Advertising & Awareness	05
Deals & Pricing	06
Shaping the Holiday Season	07

SOURCES

- **Numerator Survey insights** from 5,000 verified Prime Day shoppers
- Early-read consumer data from **Numerator Insights**
- Pre-Prime Day advertising insights from **Numerator Ad Intel**
- Prime Day pricing tracked by **Numerator Pricing Intel**





Prime Day Highlights

Participation in Prime Day skyrocketed this year, with roughly **1 IN 3 HOUSEHOLDS** making Amazon purchases. The event attracted fewer first-time shoppers than years past, but overall households shopping increased dramatically and shopping behavior held steady.

Numerator early read estimates indicate...

36%

of US households shopped Prime Day 2020 up from **23%** at last year's event*.

\$7.4B

spent by consumers at Amazon on Prime Day, up from **\$4.5 billion** last year.

135M

Amazon orders placed on Prime Day, up from **76 million** in 2019.

HOUSEHOLD BUY RATE WAS NEARLY IDENTICAL BETWEEN PRIME DAY 2019 AND 2020. Spend per order was down slightly, driven by a minor decrease in average spend per unit, but the average number of orders placed per household was up. **3 in 5** Prime Day shoppers placed 2+ orders throughout the two-day event.



	2020*	2019
Buying Rate	\$154.29	\$154.31
Spend per Order	\$54.64	\$58.91
Spend per Unit	\$32.65	\$34.00
Units per Order	1.7	1.7
Orders Placed	2.8	2.6
Shoppers Placing 2+ Orders	61.8%	57.6%

3%

of shoppers were new to Prime, **31%** were shopping Prime Day for the first time.

90%

of Prime Day shoppers expect to shop on Amazon again before the holidays.

Numerator Insights 6/15/19 – 6/16/19 vs. Early Read Insights 10/13/20 – 10/14/20

*Early Read Insights may shift slightly as data comes in, particularly projected metrics like HH Penetration, projected sales and projected trips which are early estimates

Top Items & Categories



As it has in years past, Prime Day served as an opportunity for Amazon to heavily push sales of **THEIR OWN BRANDS & PRODUCTS**. Gift cards saw a boost thanks to increased advertising & promotions and proximity to holiday gifting.

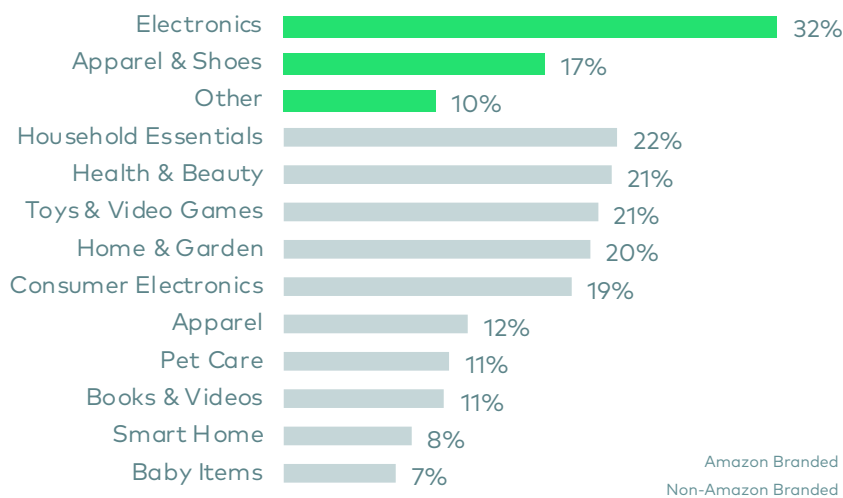
THE TOP ITEMS OF PRIME DAY 2020 CLOSELY MIRRORED THOSE OF 2019, with the Echo Dot, Fire TV Stick and Amazon Smart Plug all making the list. Gift Cards and Gift Card Reloads also saw a significant increase this year as consumers prepared for the holidays.



2020	2019
Echo Dot 3rd Gen	Fire TV Stick
Gift Card Reload	Echo Dot 3rd Gen
Amazon Smart Plug	Fire Tablet 7
Fire TV Stick	Amazon Smart Plug

Amazon BRAND ELECTRONICS WERE THE TOP ITEMS SOLD ON PRIME DAY. Other popular categories included household essentials, health & beauty products, and toys & video games.

Certain categories like pet care, household essentials and baby items were likely to be purchased regardless of Prime Day sales, according to those who purchased. Prime Day drove sales of smart home, Amazon brand electronics, and toys & video games, inspiring shoppers who wouldn't have otherwise considered these products.



Would have purchased item regardless of Prime Day

- 65% Pet care
- 62% Household Essentials
- 61% Baby Items
- 60% Health & Beauty

Would not have purchased item if it weren't for Prime Day

- 44% Smart Home
- 43% Amazon brand electronics
- 34% Toys & Video Games
- 31% Consumer Electronics

Source: Numerator Insights 07/15/19 - 07/16/19 vs. 10/13/20 - 10/14/20 | Numerator Prime Day Survey n=5,015



Advertising & Awareness

Amazon significantly **INCREASED THEIR AD SPEND** and reallocated dollars from mobile to TV, in addition to featuring a different set of products and services than years past.

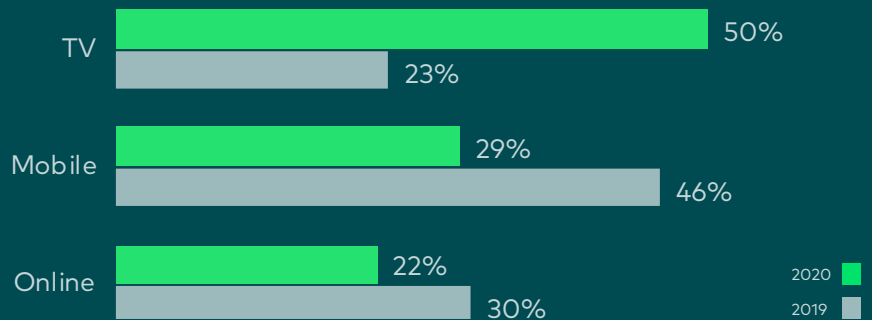
2020 ad spend

\$96.3 M

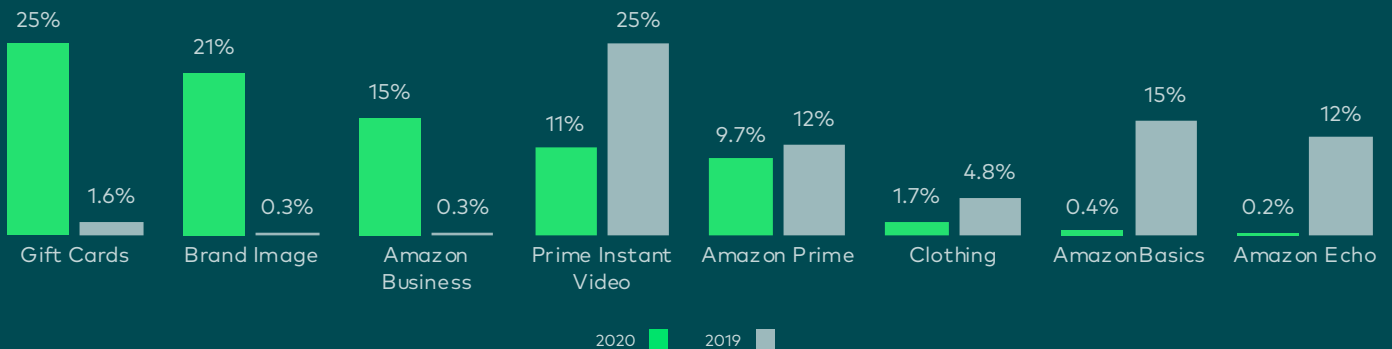
2019 ad spend

\$65.6 M

They increased ad spend across media types, but proportionally **INVESTED MUCH MORE IN TV THIS YEAR.**



Messaging also shifted significantly this year — **nearly a quarter of ad dollars went to promoting gift cards.** Last year, Amazon brands like AmazonBasics and the Amazon Echo got about a quarter of ad dollars, down to less than 1% this year.



93%



of shoppers knew it was Prime Day before shopping.

48%



said Prime Day was the primary reason they decided to shop on Amazon that day.

60%



of shoppers found out about Prime Day through Amazon.com or the Amazon App, **40%** through social media, and **18%** from a TV commercial (up from **15%** last year).

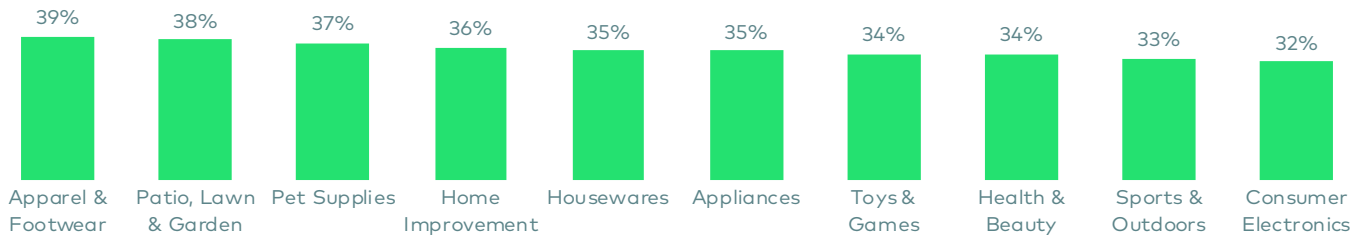
Deals & Pricing



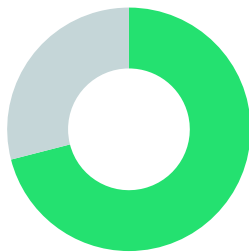
Prime Day brought **STEEP DISCOUNTS ACROSS PRODUCTS**, and consumers seemed satisfied with the deals offered, though they're anticipating even better deals on Black Friday.

DEPTH OF DISCOUNT

Of the 600+ Prime Day listings we observed, the average depth of discount across categories was **35%**. At the category level, discounts ranged from a high of **39%** (apparel) to a low of **32%** (consumer electronics).



PRICE COMPARISONS



71% of shoppers did not compare Amazon prices with other retailers for their Prime Day purchases

DEAL RANKINGS

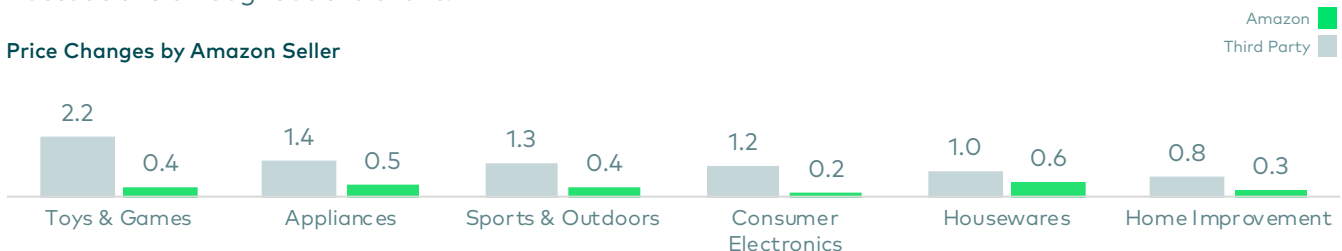
54% of shoppers were very or extremely satisfied with the deals offered; **most shoppers expect better deals on Black Friday**



PRICE VOLATILITY

The average item tracked on Amazon changed prices fewer than **1x** on Prime Day, while those sold by third-party marketplace sellers changed prices roughly **1.2x**. Toys & Games saw the most price fluctuations throughout the event.

Price Changes by Amazon Seller



Source: Numerator Pricing Intelligence, select products tracked hourly 10/13/20 - 10/14/20 | Numerator Prime Day Survey n=5,015



Shaping the Holiday Season

This year's delayed Prime Day served as an **UNOFFICIAL KICKOFF TO THE HOLIDAY SHOPPING SEASON**, with nearly 1 in 3 shoppers purchasing holiday gifts. The majority of Prime Day shoppers still intend to participate in upcoming holiday sales like Black Friday and Cyber Monday.



29% shopped for holiday gifts



25% of those completed at least half of their holiday shopping for the season

GIFT SHOPPERS



Those shopping for gifts spent an average of **\$286.79** on Prime Day — nearly twice that of the typical Prime Day shopper



They placed an average of **5 separate orders** throughout the Prime Day event



They were **3.6x** as likely to purchase Toys and Video Games, **1.9x** as likely to purchase Baby items, and **1.7x** as likely to purchase Books & Videos compared to non-gift buyers

SHOPPING ON PRIME DAY WON'T RULE OUT IN FUTURE HOLIDAY EVENTS:

56% still expect to shop on Black Friday

59% on Cyber Monday

OF THOSE PLANNING TO SHOP...

32% expect to spend more this year on Black Friday and Cyber Monday

17% expect to spend less



To learn more about the impact of Prime Day
on your brand, category or shoppers, contact us at
hello@numerator.com.