Executive Summary

Prime Day has become one of the biggest shopping events of the year. Almost 97 million units were sold on Amazon across the five analyzed sectors in the U.S. during the week of Prime Day 2019. Despite the sales event lasting only 48 hours, Prime Day 2019 was only 40% smaller in terms of units sold across Amazon, Walmart and Target than a week-long sales event like Black Friday or Cyber Monday 2018. As Amazon continues as the online destination for shopping during sales events, brands need to better understand the platform’s impact on the retail calendar — both online and offline.

The Gartner L2 Amazon Intelligence: Sales Events Report evaluates the ways in which sales events on Amazon have evolved over the last year, as well as their impact on the broader retail landscape. This report also analyzes sales promotional investments and broader category dynamics in Clothing, Beauty, Consumer Electronics, Home Care and Personal Care between Prime Day 2018 and Prime Day 2019.

Key Findings

- Traditional retailers like Walmart and Target leverage the halo effects created by Amazon’s Prime Day by hosting competing sales around the same time frame. On July 16th, Home & Kitchen unit-sales grew by 14% on Target and Consumer Electronics grew by 18% on Walmart (both relative to the daily average).
- Every Prime Day so far has been Amazon’s “Biggest Yet.” Clothing unit sales grew by nearly 50% relative to Prime Day 2018 — the biggest in terms of volume. Consumer Electronics, already one of the most competitive categories on Amazon, grew by 23%.
- Marketing investments in Sponsored Products and Sponsored Brands become more fragmented as brands clamor to run campaigns. Compared to non-holiday periods, sponsored brand impressions’ share of top ten brands fell by an average of 33% on Prime Day 2019.

Key Takeaways

- As Amazon makes an increasing impact on the retail calendar, brands should be aware of what platform and what season is optimal for their assortment. By understanding category dynamics across Target, Walmart and Amazon, brands can position their merchandise competitively.
- Prime Day can only be expected to expand in scope next year, and brands should think about how to best position themselves in their categories while hedging against increasing competition. Identifying Amazon brand launches prior to Prime Day can be a good indicator of areas that will drive growth for the upcoming season.
- Deal pages, search advertising and display advertising have all become hyper-competitive during Prime Day. Brands need to understand the categories they best compete in and be willing to devise bid strategies, campaign structures and pre-event investment ring-fences to start owning their respective category before the event day arrives.

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