



Prime Early Access Sale 2022 Recap

Includes **Walmart Rollbacks & More** & **Target Deal Days**



A SINGLE DATA SOURCE. INFINITE INSIGHTS.

Highlights from the Prime Early Access sales event:

Amazon's Early Access sale was **smaller than Prime Day**.

The Prime Early Access Sale had lower overall awareness & spending than July's Prime Day. Shoppers placed fewer, smaller orders and purchased lower-priced items than they did during the Amazon's summer sale.

The Prime Early Access event eased shoppers into the holiday season.

Although holiday gift categories like toys and games saw a surge during the Early Access sale, only about a quarter of shoppers say they purchased holiday gifts, and most are less than halfway done with their holiday gift shopping.

Shoppers were **less satisfied with Prime Early Access deals**.

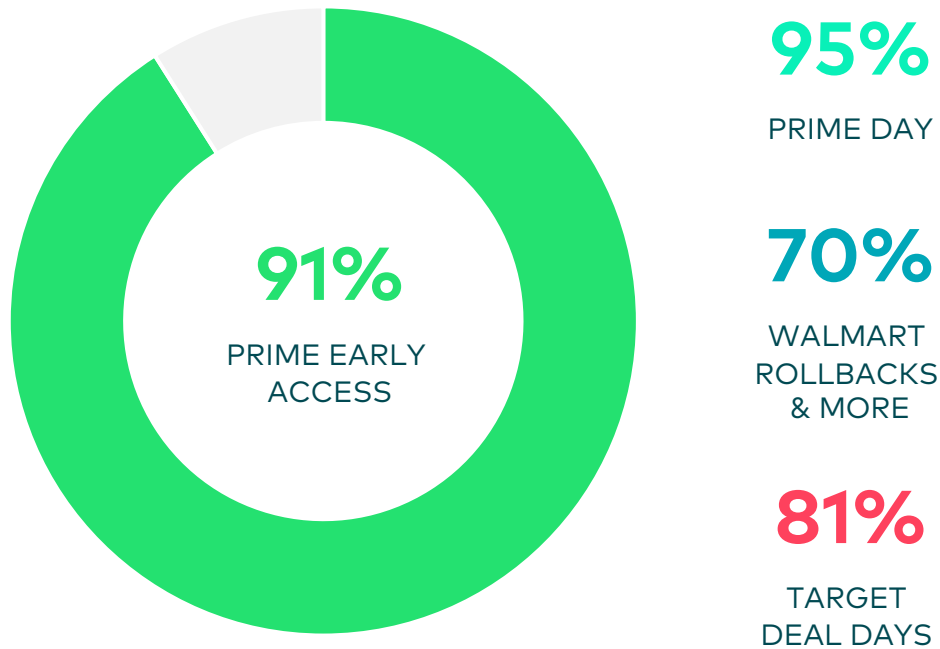
Compared to Prime Day, Walmart Rollbacks & More and Target Deal Days, shoppers had lower overall deal satisfaction during the Prime Early Access Sale, likely driven by the types of items featured and the depth of discounts offered.

Most Prime Early Access shoppers were aware of the sale prior to shopping, but it was less of a trip driver than Prime Day or Target Deal Days.

Awareness for Amazon's October pre-holiday sale was down from July's Prime Day, but up compared to Walmart and Target's pre-holiday sales. Despite higher awareness, the Prime Early Access sale was less influential in driving purchase decisions.

SALE AWARENESS

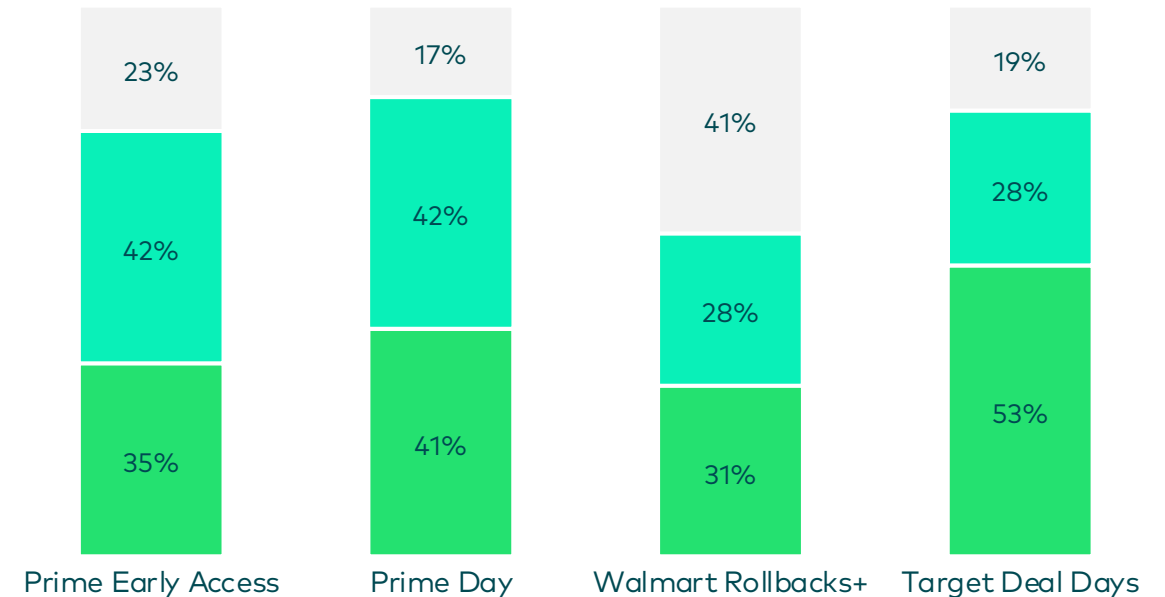
% of shoppers who were aware of event prior to shopping



SALE INFLUENCE

How influential was [EVENT] in your decision to shop at [RETAILER]?

■ Primary reason I shopped ■ One reason I shopped ■ Little-to-no influence



Orders placed during the Prime Early Access sale were smaller than Prime Day orders, and shoppers spent less overall at the October sale.

While the Prime Early Access sale drove a definite boost from an "average" Amazon two-day period, it didn't top Prime Day highs. Early read Numerator data indicates household penetration was down roughly 8 points from Prime Day 2022 and spending was down from \$200 to \$135 per household, driven by fewer, smaller orders per household and lower priced items.

	PRIME EARLY ACCESS <i>10/11/22– 10/12/22</i>	PRIME DAY 2022 <i>07/12/22 – 07/13/22</i>	BENCHMARK PERIOD <i>10/04/22– 10/05/22</i>
Household Penetration	28.4%	34.1%	18.8%
Orders per Household	2.7	2.9	1.7
Spend per Household	\$117	\$177	\$59
Order Size (\$)	\$50	\$61	\$35
Order Size (Units)	1.7	1.6	1.6
Spend per Unit	\$29	\$33	\$22

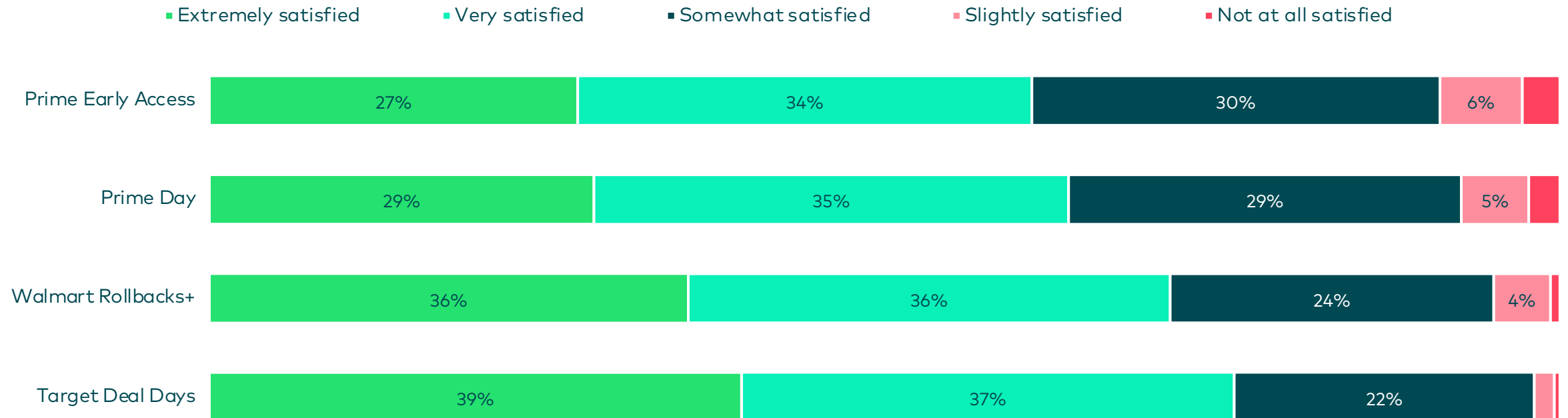
Source: Numerator Total Commerce Panel | Amazon 10/11/22 – 10/12/22, 7/12/22 – 7/13/22 & 10/4/22 – 10/5/22

Deal satisfaction was lower for the Prime Early Access sale than for Prime Day, Walmart Rollbacks & More or Target Deal Days.

More than half of Prime Early Access shoppers were highly satisfied with the deals offered, but this was the lowest of the four sales analyzed. Lower satisfaction may tie to the products available in the sale as well as depth of discounts offered.

DEAL SATISFACTION

How satisfied were you with the deals offered during [SALE]?



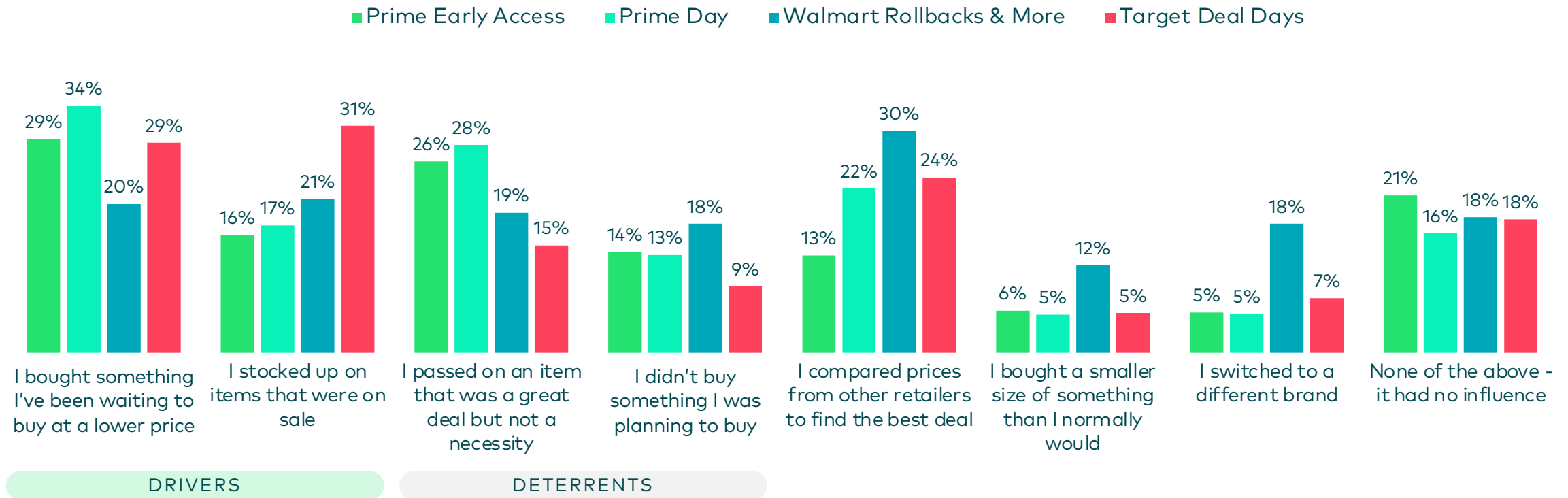
Source: Numerator Surveys for Prime Early Access 2022, Walmart Rollbacks & More Event 2022, Target Deal Days (October) 2022, Prime Day 2022

Inflation had less impact on the Prime Early Access event than other sales.

Fewer than four-in-five Early Access shoppers say inflation impacted their purchases, and while it drove certain purchases, it also deterred some from non-essential spending. Target Deal Days was the most popular sale for consumers looking to stock up, while Walmart Rollbacks & More saw the largest portion of shoppers comparing prices with other retailers for the best deal.

INFLATION IMPACT

How, if at all, did general inflation and higher prices influence your [SALE] purchase decisions?



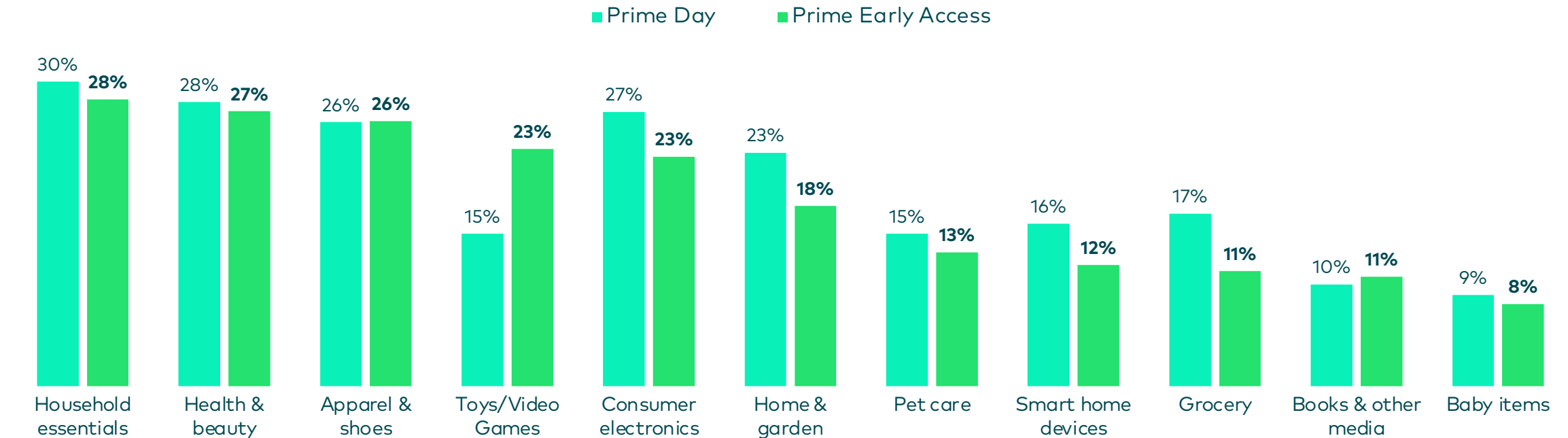
Source: Numerator Surveys for Prime Early Access 2022, Walmart Rollbacks & More Event 2022, Target Deal Days (October) 2022, Prime Day 2022

Holiday gifting categories saw a boost during the Prime Early Access Sale.

Toys & video games were the #4 category consumers claim to have purchased in the Early Access Sale, up from #9 during July's Prime Day event. Books & media was the only other category to see an increase in households buying during the October sale.

CATEGORIES PURCHASED

Which categories did you purchase during [SALE]?



Index Early Access vs. Prime Day



Source: Numerator Surveys for Prime Early Access 2022 & Prime Day 2022

The Prime Early Access sale saw a shift from Amazon-owned brands to toy brands, with three Amazon brands making the list for both sales.

Seven of the top ten brands in the Prime Early Access sale were new to the list versus Prime Day, five of which were toy brands. Only three of the top ten Early Access brands were owned by Amazon, compared to seven on Prime Day.



5 of the top 10 Prime Early Access brands were toys & games.



7 of the top 10 Prime Day brands were Amazon-owned.

TOP BRANDS PRIME EARLY ACCESS*

Based on total units sold

1. Amazon Basics
2. Vtech
3. Melissa & Doug
4. Just Play
5. LeapFrog
6. Leneige
7. Anker
8. Amazon Echo Show
9. Lumineux Oral Essentials
10. Barbie

TOP BRANDS PRIME DAY 2022

Based on total units sold

1. Amazon Fire
2. Amazon Echo
3. Amazon Basics
4. Blink
5. Ring
6. Happy Belly
7. TP-LINK
8. Bentgo
9. Orgain
10. Ziploc

In-line with top brands, the top items list for Prime Early Access featured fewer electronics and multiple older-generation products.

Top items like the Echo Dot 3rd Gen and Apple AirPods 2nd Gen both have newer versions available in the market, indicating Amazon may have been utilizing the Early Access event to clear out old inventory before the official holiday season.

TOP ITEMS PRIME EARLY ACCESS*

Based on total units sold

1. Amazon Gift Cards & Reloads
2. Laneige Lip Masks
3. Fire TV Stick
4. Echo Dot 3rd Generation
5. Luminex Teeth Whitening Strips
6. Melissa & Doug Toys
7. Apple AirPods 2nd Generation
8. Nylabone Healthy Edibles
9. Simple Joys by Carter's Clothing
10. Crest 3D Whitestrips

TOP ITEMS PRIME DAY 2022

Based on total units sold

1. Amazon Gift Cards & Reloads
2. Fire TV Stick
3. Echo Dot 4th Generation
4. Echo Show 5
5. Orgain Organics Protein Powder
6. Kasa Smart Plug Mini
7. Blink Video Doorbell
8. Ring Video Doorbell
9. Cascade Dishwashing Products
10. Vital Proteins Collagen Products

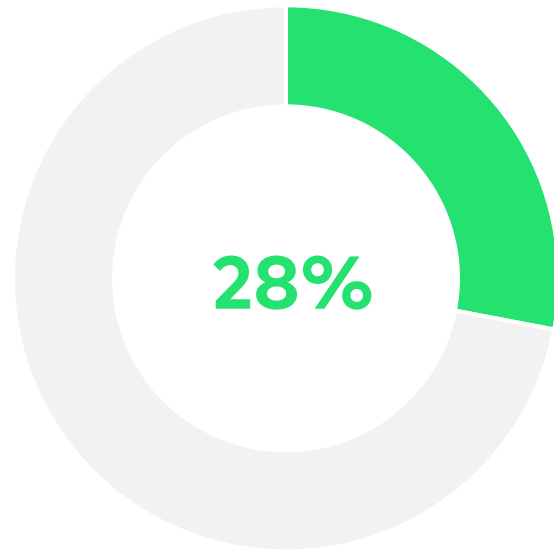


The **Echo Dot 3rd Generation** was a best-seller during the Prime Early Access Sale, while the **4th Generation** version made the list during Prime Day three months earlier.

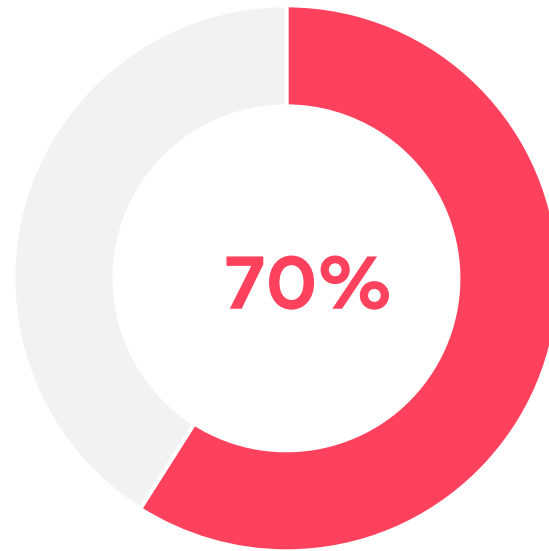


Though holiday gift products & categories were up in the Early Access Sale, shoppers still have a ways to go in their holiday shopping.

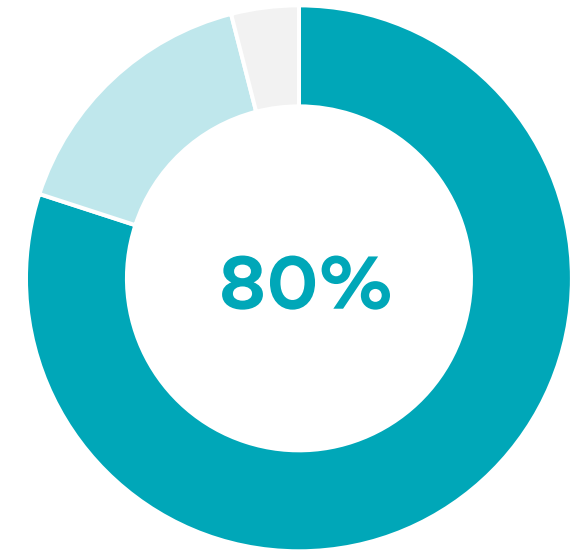
Only about a quarter of Prime Early Access shoppers used the sale to purchase holiday gifts. Among those individuals, 70% completed less than half of their overall gift shopping and 80% say they'll "definitely" shop on Amazon in the coming months for additional holiday items, with another 16% saying they "probably" will shop on Amazon for more holiday items.



Used the Prime Early Access Sale to purchase **holiday gifts**.



Completed **less than half** of their gift shopping.



Will **"definitely"** shop on **Amazon again** in the coming months for more holiday items.



Stay on top of holiday shopping trends.

Interested in learning more about the Amazon Early Access sale or tracking holiday gift sales for your brand or retailer? Reach out to your Numerator representative or contact us at hello@numerator.com.



Sources Used:

NUMERATOR CUSTOM SURVEYS

We reference multiple surveys throughout this report with verified buyers of four different retailer sales:

Prime Early Access

fielded 10/11/22 – 10/13/22 (n=5,171)

Prime Day

fielded 7/12/22 – 7/14/22 (n=5,697)

Walmart Rollbacks & More

fielded 10/10/22 – 10/14/22 (n=647)

Target Deal Days

fielded 10/6/22 – 10/9/22 (n=647)

NUMERATOR INSIGHTS

Observed shopping behavior comes from our Total Commerce Panel of 150k active shoppers.

**A previous version of this report used Early Read data, which has since been updated with the latest figures.*