

PMG

THE 2025 AMAZON PRIME BIG DEAL DAYS REPORT

FRESH INSIGHTS ON DISCOUNTS, ESSENTIALS PURCHASING & TRADE-DOWN BEHAVIOR

Amazon's 2025 Prime Big Deal Days event took place from October 7 to 8, serving as the unofficial kickoff to the holiday shopping season. After analyzing activity between the 2024 and 2025 events on Amazon US, leveraging PMG's Velocity insights and data, it's clear that essentials are capturing more consumer dollars this year, and trading down activity remains fairly pervasive. It was a mixed bag for consumers from a deal perspective, which, together with longer-term consumer trends on Amazon US, underscores the complex outlook for brands as Q4 gets underway.

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PRIME BIG DEAL DAYS REMAINS A FALL TENTPOLE

Amazon's Prime Big Deal Days event started in 2022 (then called the Prime Early Access Sale), serving as a mid-October counterpart to Prime Day in July. The event serves as the fall tentpole for the retail site, with timing that better aligns with Q3 seasonality, benefiting some brands while still occurring over a month before Black Friday. Amazon has generally promoted the event as holiday-focused, highlighting deals on various discretionary items, such as toys, home appliances, and electronics, which are popular gifts during the fourth quarter.

Just a few months earlier, a PMG analysis revealed that July Prime Day sales increased only modestly year-over-year (YoY) despite doubling the event's duration from two to four days. More immediately, in the week preceding Prime Big Deal Days 2025, the average selling price (ASP) of the top-selling products on Amazon US dropped at the steepest year-over-year rate seen in 2025 (excluding the Prime Day week, when the dates were misaligned).

OVERALL, CONSUMERS ARE BECOMING MORE VALUE-CONSCIOUS ON AMAZON US.



24 OF LAST 28 WEEKS

YoY ASPs of Weekly Top Selling Products on Amazon US

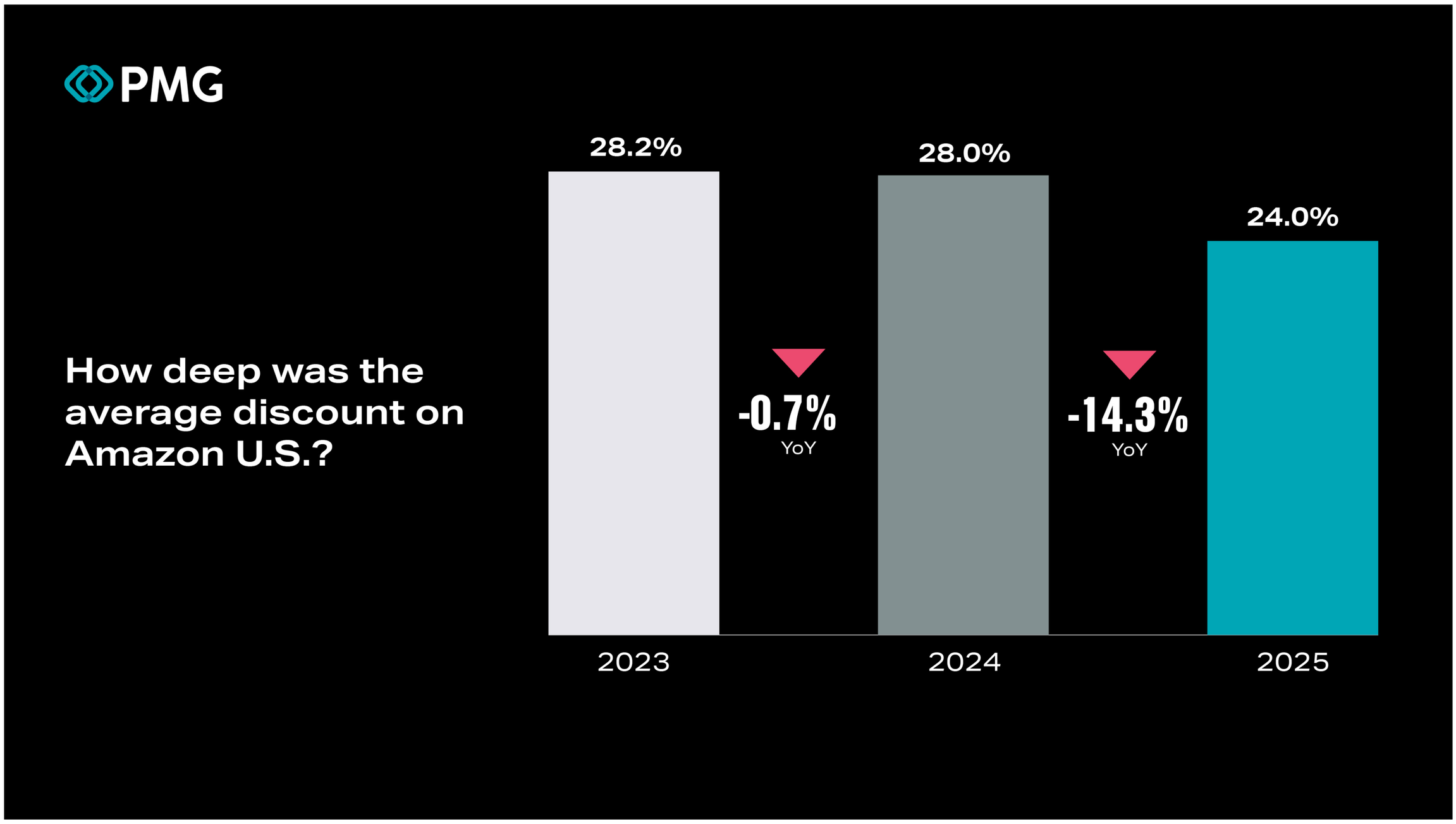
Specifically, for the week ending October 4, 2025, the ASP of the 1,000 most popular products on Amazon fell by 4.7% YoY. In absolute terms, the $20.93 ASP for these products is the lowest recorded since the beginning of 2024. This marks the ninth straight week with year-over-year ASP declines of more than two percentage points and is part of 19 of the past 21 weeks and 24 of the last 28 weeks in which ASPs have decreased YoY across this group.

While this trend varies across different categories, it highlights that overall, consumers are becoming more value-conscious on Amazon US. In this environment, discounting would make for a particularly effective marketing strategy. However, tariffs and broader inflationary trends are squeezing margins for many brands, making it harder to execute deals.

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DISCOUNTING TRENDS

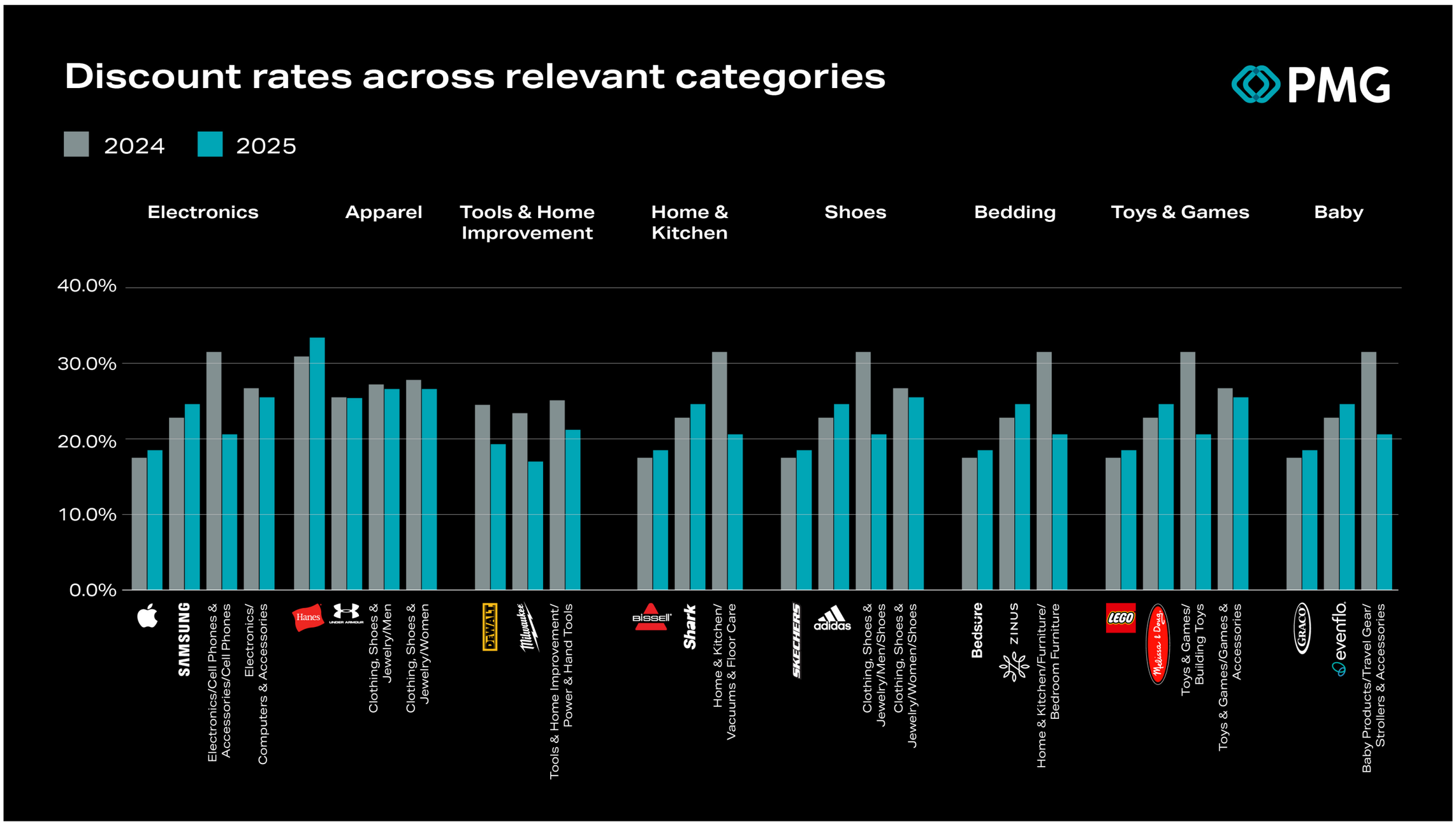
During Prime Big Deal Days on Amazon US, the average discount shifted from 28% in 2024 to 24% in 2025. This overall reduction in discount depth is likely partly due to margin pressure across many products resulting from tariffs and rising supply chain costs, as well as new, higher deal fees from Amazon that took effect this summer.





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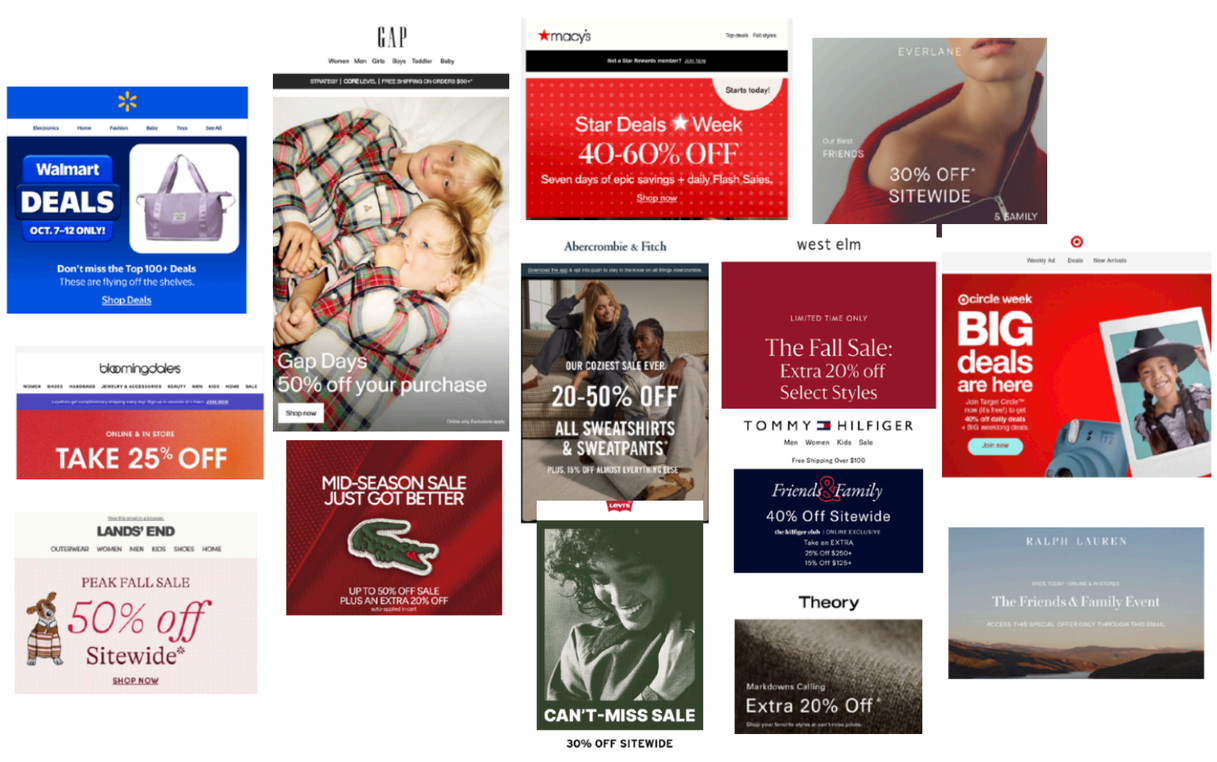
Within most broader categories, average discounts were less steep across the board on a YoY basis. However, underscoring the variability of the Amazon marketplace, several major brands discounted slightly more heavily YoY.



Across the broader retail landscape beyond Amazon, ecommerce discount offers remained largely consistent with last year's levels, with most brands promoting discounts of 20-50%. Major big-box competitors like Target and Walmart continued to host their respective deal events, each lasting several days longer than Prime Big Deal Days and featuring discount levels similar to those of last year.

With consumers more deal-conscious and more prone to price compare, having a broad strategy around ecommerce promotions is imperative for maximizing holiday season returns.

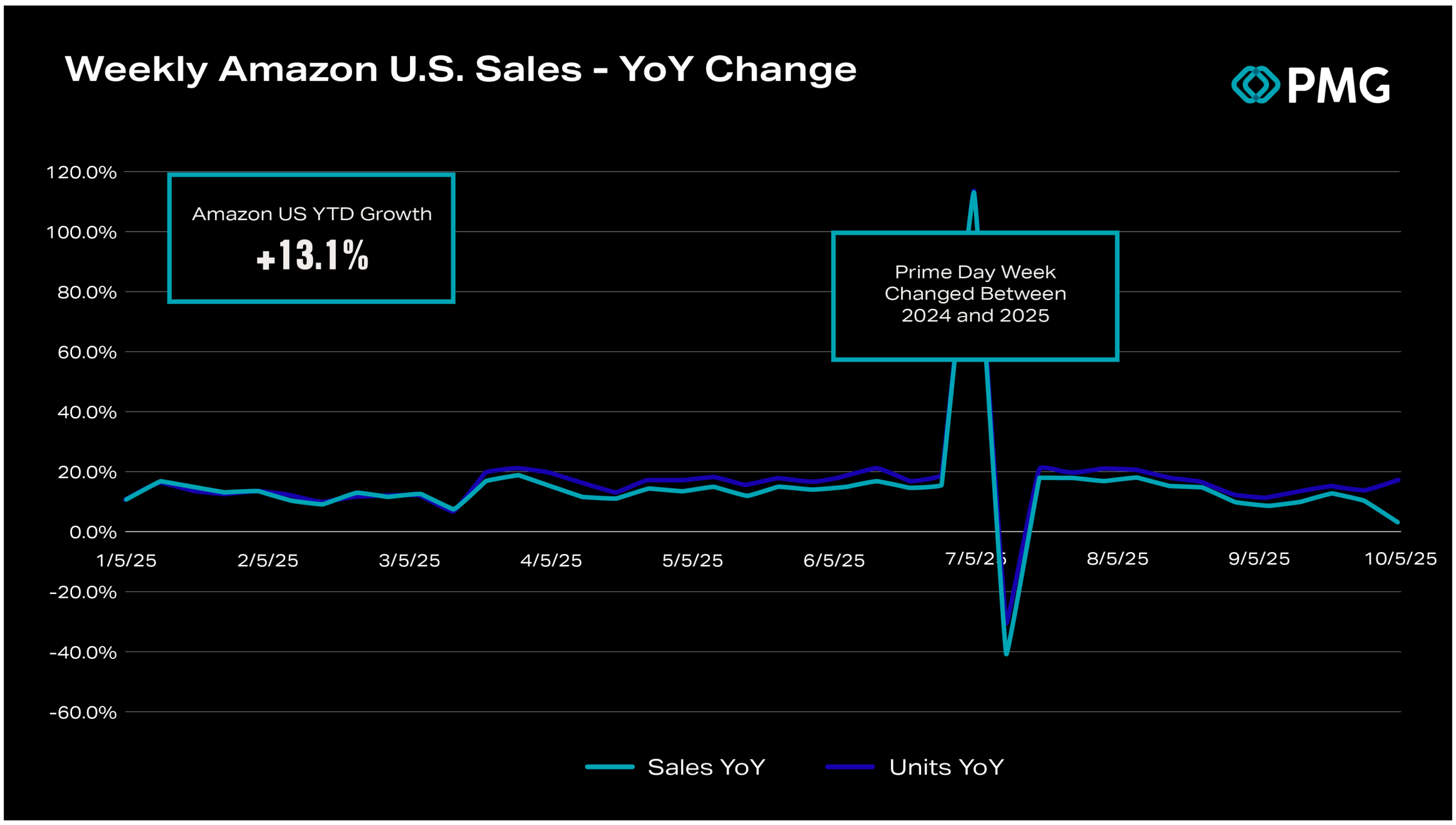
PROMOTION LANDSCAPE SNAPSHOT: OCTOBER 6 - 12 2025



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SALES AND PRICING TRENDS FROM PRIME BIG DEAL DAYS

Across Amazon US, sales have increased by 13.1% year-to-date compared to the same period in 2024. However, during the week of Prime Big Deal Days, despite being a major sales period in dollar terms, YoY growth was weaker at +3%. This contrasts with the +13% YoY growth observed between the 2023 and 2024 events.



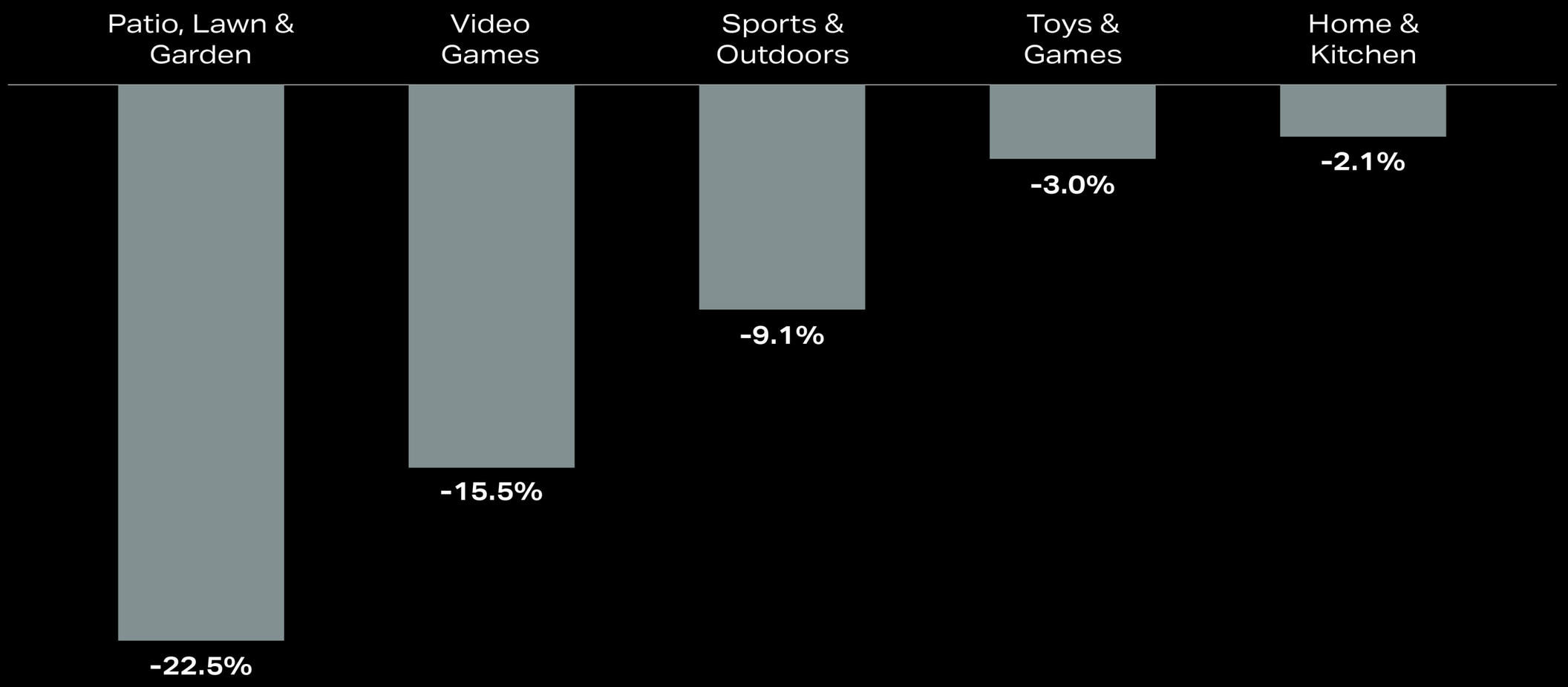
This year’s trends showed steady growth, with a meaningful shift in consumer behavior.

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Notably, units sold growth remained fairly steady at +16% YoY in 2024 and +17% YoY in 2025. This suggests that consumers are generally choosing lower-cost products, supported by a category-specific analysis showing that YoY growth rates were lowest across more considered categories, such as Video Games, Sports & Outdoors, Electronics, and Patio, Lawn & Garden.

Biggest Declining Categories

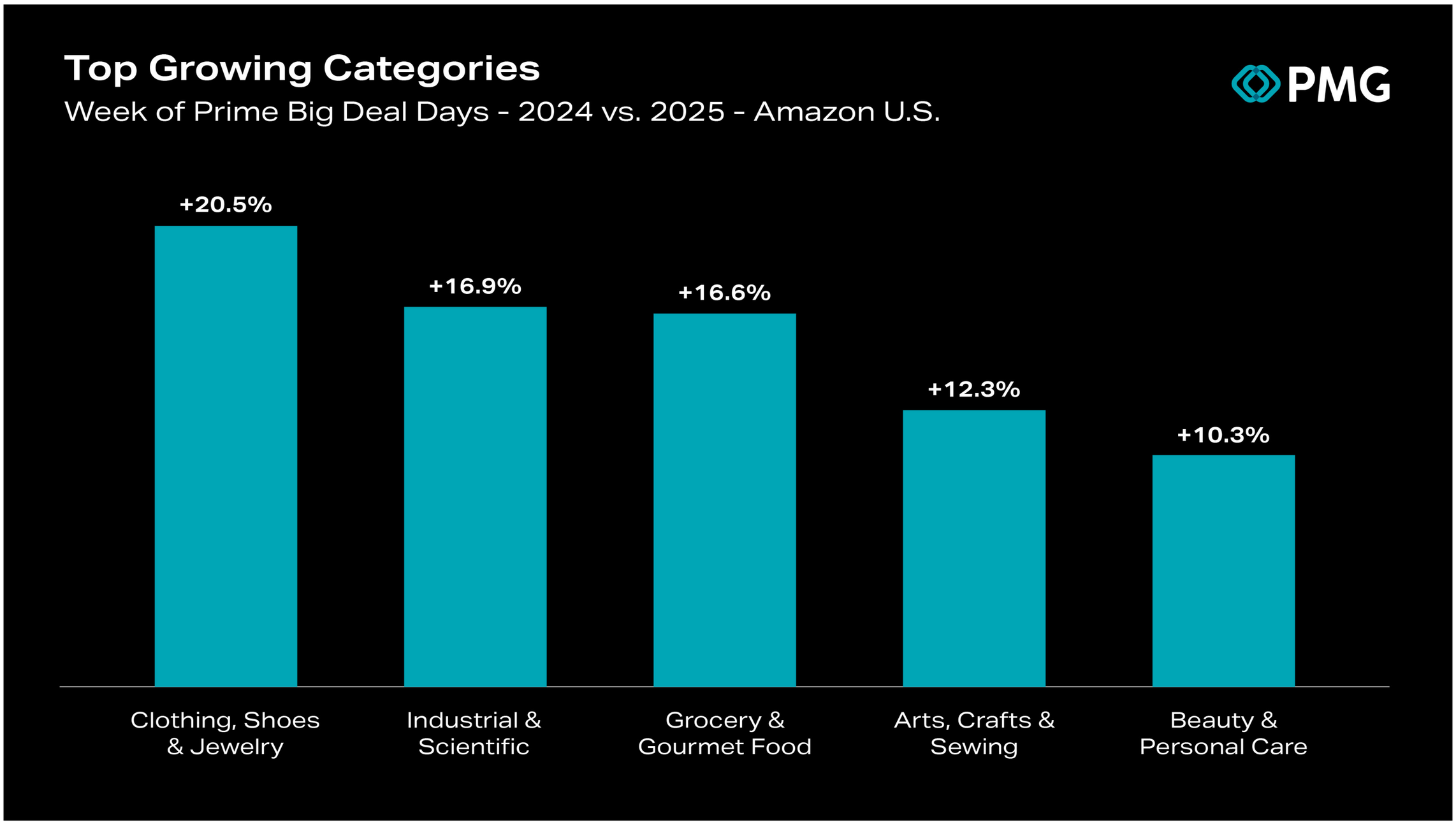
Week of Prime Big Deal Days - 2024 vs. 2025 - Amazon U.S.





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Meanwhile, growth rates were highest in categories focused on essentials or budget-friendly items such as Clothing, Shoes & Jewelry, Grocery & Gourmet Foods, Arts, Crafts & Sewing, Beauty & Personal Care, and Industrial & Scientific.

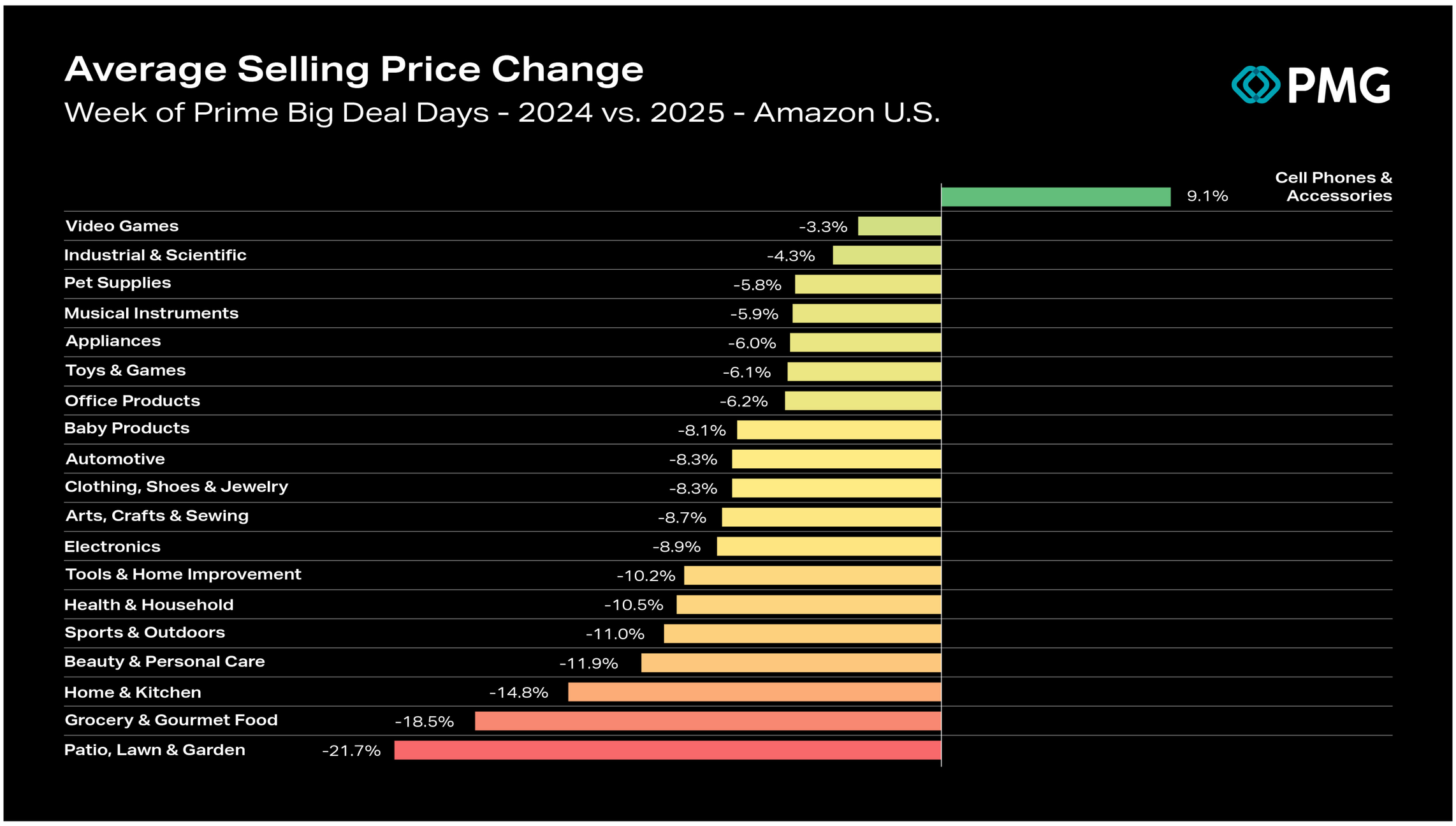


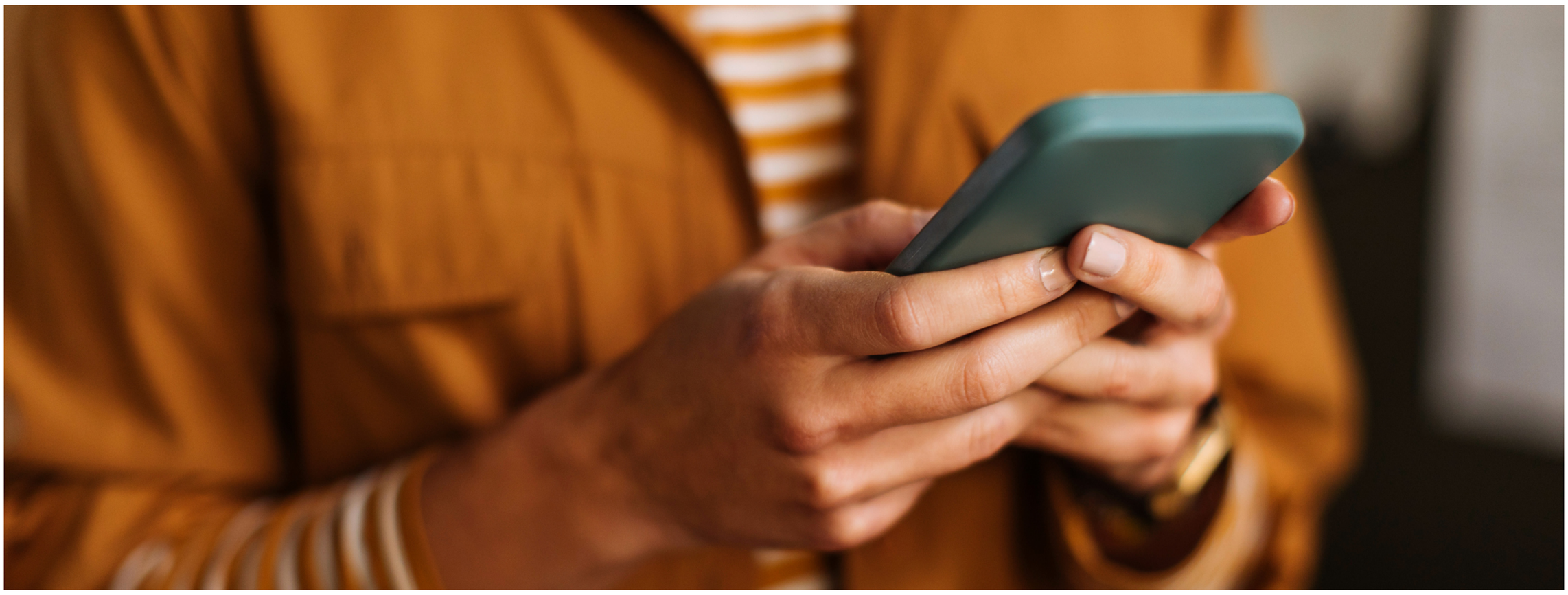
Collectively, these shifts highlight how Amazon is generally becoming stronger in essentials overall, a fact the retailer has promoted in recent months.



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Beyond the broader category purchasing trends, there was considerable trade-down activity during Prime Big Deal Days week compared to the 2024 event. An ASP analysis, examining the estimated total revenue divided by the estimated total units sold, excluding discounts, showed fairly pervasive YoY declines in ASP. Only the Cell Phones & Accessories category saw year-over-year increases in ASPs.





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WHAT THESE TRENDS MEAN FOR HOLIDAY 2025

A major tension in the marketplace is that while consumers are trading down, many brands aren't offering larger discounts. We have already observed a decrease in discount depth and breadth during Prime Day 2025 compared to Prime Day 2024, likely due to margin constraints. Looking ahead, we expect continued price sensitivity on Amazon throughout the holiday season. This could also result in smaller holiday shopping budgets.

Deal consciousness has shifted shopping habits, with consumers more willing to wait. During Prime Day and Prime Big Deal Days, a smaller share of total event sales happened early on Day I compared to previous years. The idea of 'doorbuster' sales has become less of a primary driver for consumer purchases and more about the desire to find a good deal whenever one appears.



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FINAL THOUGHTS: STRATEGIC CONSIDERATIONS FOR ADVERTISERS & BRANDS

With these trends in mind, we recommend the following guidance as brands approach the busiest portion of the holiday shopping season.

SEED DEMAND TO PUT YOUR BRAND IN THE BEST POSITION FOR THE LENGTHENED 'PEAK PERIOD'

Amazon and other retail sites now personalize deal pages and related content to better match the products a consumer has already viewed, rather than focusing solely on the biggest deals available. Simultaneously, retail sites highlight deal availability over longer periods to attract shoppers both before and after major events like Black Friday and Cyber Monday (e.g., Turkey 12 on Amazon).

We've already observed 'stretched' demand during recent major events, indicating that brands able to engage shoppers early (through DSP and other top-of-funnel channels) beyond search will be better positioned to adapt to these shifts in consumer behavior and market dynamics.

CONSIDER RUNNING DISCOUNTS FOR LONGER PERIODS, EVEN IF THE DISCOUNT HAS TO BE LIGHTER

Since consumers are more likely to focus on discounts rather than events during this holiday shopping season, it's helpful to keep deals available for as long as possible. This might require offering less steep discounts than in previous years or targeting a specific group of products for price promotions. Analyzing the share of revenue that competitors have discounted during past major events can help inform your strategy.

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PRIORITIZE PROMOTIONS TIED TO PRODUCTS WITH A PRICE ADVANTAGE VERSUS COMPETITORS

Shoppers are actively comparing prices at high rates both within Amazon and across retail sites. Advertising products with higher discounts has historically been associated with better revenue performance, both immediately after a major event and in the months that follow. Given the broader market environment, it's especially important to focus advertising support on products that will compete well on price, rather than on new or higher-margin products.

The data from Prime Day and Prime Big Deal Days shows a notably different environment for brands in terms of driving growth. This holiday season is likely to follow a similar pattern. Brands that can develop strategies focused on a longer 'long-haul' shopping period, while remaining flexible to adapt as market conditions change, will be best positioned to succeed despite market challenges.

METHODOLOGY

All data described above is collected from over 30 million products on Amazon US, according to Velocity, PMG's proprietary commerce platform. Pricing and estimated sales figures are presented as weekly data along with year-over-year change comparisons. Discount data includes both Prime Day-specific deals and general promotional discounts across the same set of 30 million products.

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ABOUT PMG

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