

**From:** gap intelligence  
**Sent:** Tue, 17 Oct 2023 07:22:32 +0000  
**To:** chatty@google.com  
**Subject:** Amazon Big Deal Days 2023: Smartphones



## MARKET INTELLIGENCE REPORT



### Smartphone

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Oct 17, 2023



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## PRODUCT UPDATES

- gapSnapshot: Did Other Merchants Successfully Counter Amazon's Prime Big Deal Days Sales Event?
- Amazon Prime Big Deal Days 2023: Smartphones



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- Walmart Announces Next-Gen Fulfilment Center Location
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- Companies Continue to Regionalize Supply Chains
- Survey: 44% of Holiday Shoppers Plan to Shop During Pre-Season Events

## PRODUCT UPDATES

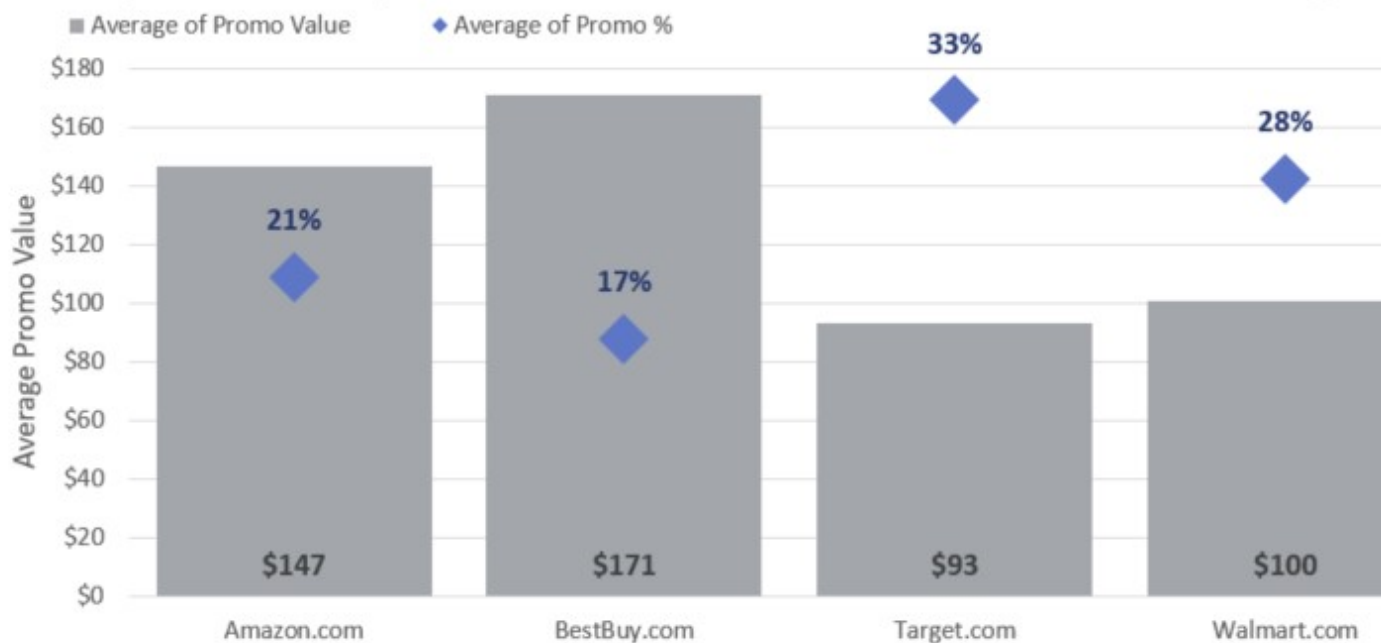
gapSnapshot: Did Other Merchants Successfully Counter Amazon's Prime Big D  
Sales Event?

This week's Snapshot highlights the average promotional values and discounts from Amazon and other major retailers during the week of Amazon's Prime Big Deal Days 2023 sales event. Data includes all products and offers captured during the week of October 8, 2023.

### gap impact summary

- Amazon's Prime Big Deal Days 2023 motivates competing sale events across major online merchants intent to kick off holiday shopping season & capitalize on increased deal activities during the week
  - Average discount percentage across major merchants was 21%, 4 points shallower vs. [Prime](#) July of this year
- Target shows most aggressive average discount percentage during week (33%) based on low-priced assortment, leading to lower average promo value compared to most merchants (\$93)
- Best Buy falls under event's average promo discount percentage w/ 17% off overall, but it has larger savings in comparison to Amazon due to its penchant for flagship models (\$171 vs. \$147 savings)
  - Best Buy responsible for the largest deals recorded during week including 70% off Samsung's Galaxy Z Flip4 5G (\$149), 61% off Google's Pixel 6 5G (\$289), and 60% off Samsung's Galaxy Z Flip4 5G (\$149)

## Smartphones: Major Merchant Reactions to Amazon Prime Big Deal Days



*\*data includes all products & pricing captured during the week of 10/8/23 including, but not limited to, designated sale events*

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Source: “Promotions” tab within the October 15, 2023 Pricing & Promotions Report in [Dashboard](#) Recent

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## Amazon Prime Big Deal Days 2023: Smartphones

Amazon held its Prime Big Deal Days 2023 last week (October 10 & 11) and [announced](#) that the sale was “the largest two-day October holiday kickoff event ever.” Prime members saved more than \$1 billion worldwide during the course of the two-day shopping event. During the first day of Prime Big Deal Days 2023, more than 25 million smartphones were purchased in the US with same-day or next day delivery.

According to Numerator, consumers spent an average of \$53.47 per order, up 20% from \$46.68 during the Prime Early Access Sale. The average order size was only down 1% from July’s Prime Day, which was \$54.09. 75% of customers said they shopped during both events this year. The average household spent \$124.09, up 12% from \$111.09 during the Prime Early Access Sale.

Prime Early Access Sale 2022 (\$110.45) and down 20% from July's Prime Day 2023 (\$155.67). While 58% of Numerator's surveyed Prime Day shoppers stated they were highly satisfied with the deals offered, 55% compared to other retailers before finalizing their Amazon purchases. Numerator's Amazon Prime Big Deal Day Tracker showed the most popular product categories being apparel & shoes (25%), home goods (23%), and household items (21%). The top items during Prime Big Deal Days were Premier Protein Shakes, AmazonBasics Batteries, Amazon Fire TV Stick, Liquid I.V. Hydration Packs, and Energizer AA Batteries. Notably, 27% of consumers said that they used the sales event to purchase gifts for the upcoming holiday season.

### gap impact summary

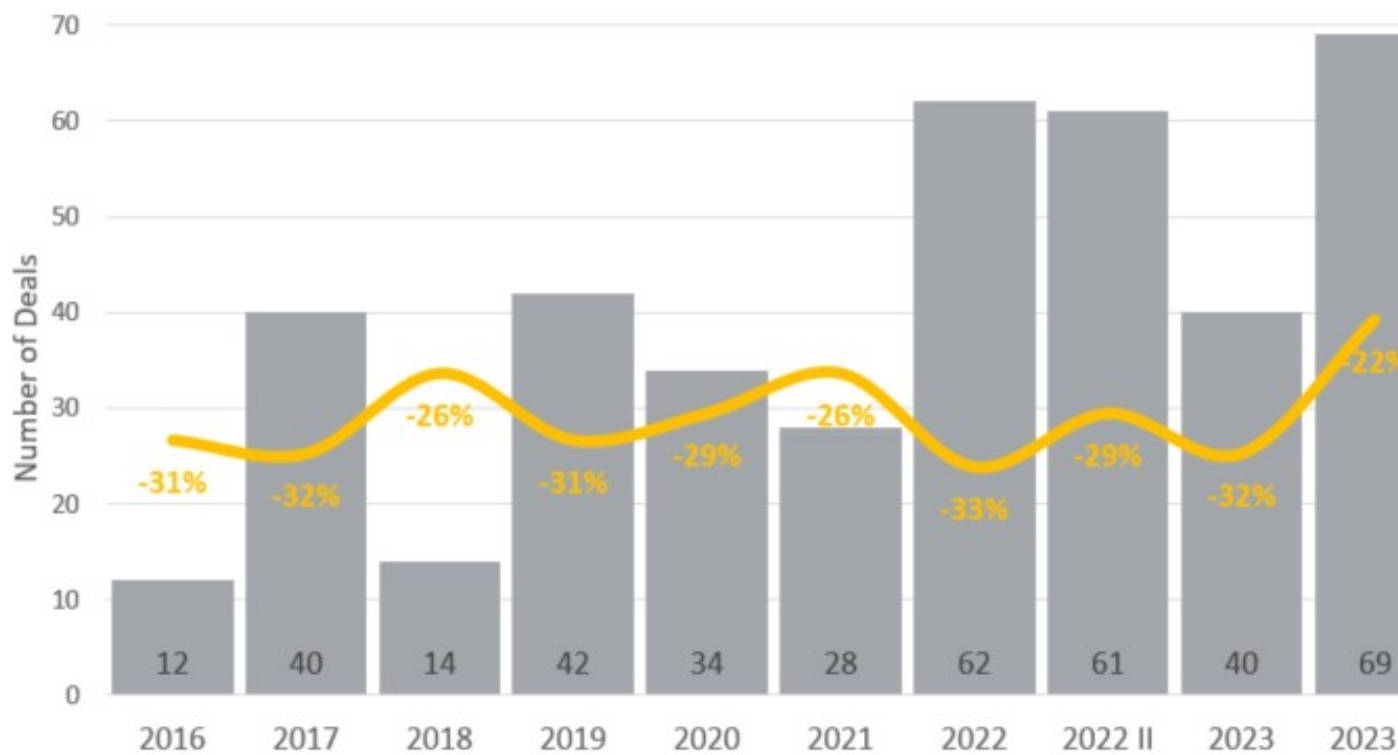
- Prime Big Deal Days saved consumers \$1 billion over the two-day event
- Prime BDD was the largest October holiday kickoff event by the company to date
- Prime members purchased 137,111 items on 73,342 Amazon orders
- Prime Big Deal Day's 2023's 40 unique smartphone promotions is 34% decrease vs. last October's Prime Early Access sale event, but consistent to Prime Day 2023 in July
- Average discount value of 24% off is least aggressive yet & 5 percentage points behind last year
- Motorola & Samsung lead deal count; Samsung sets lower threshold of \$400 off



## Smartphone Deals of Amazon Prime Big Deal Days 2023

gap intelligence compiled snapshot data for smartphone deals shipped and sold by Amazon.com, specifically “Prime Big Deal” during the event. The data was captured at multiple intervals between Tuesday, October 10, 2023 and Wednesday, October 11, 2023. Products that sold out had their event labeling removed and were not live for the remainder of the sales period.

### Smartphones: Amazon Prime Day Trends

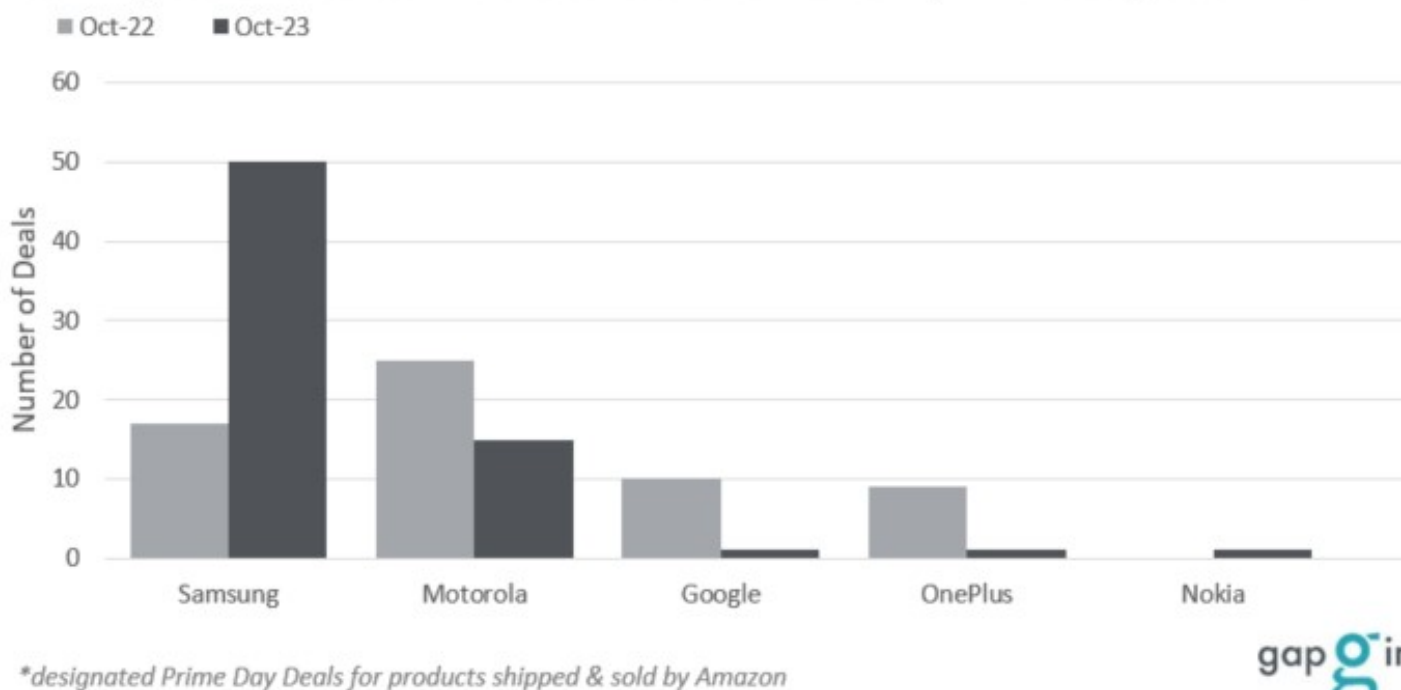


*\*designated Prime Day Deals for products shipped & sold by Amazon*

Amazon's Prime Big Deal Days 2023 included an array of 40 unique promotions for smartphones, the exact same number as the last Prime Day event. While the October sale featured a consistent level of smartphones compared to [2023](#) in July (40 deals), it marked a 34% reduction from last fall's [Prime Early Access event](#) (61 deals). This came from an increased deal count from Samsung that countered declines from other consistent Prime Day players, returning to the October event including Motorola, Google, and OnePlus. Nokia and Alcatel, which were absent from Prime Day 2023 in July, also featured exclusive Prime member deals during the two-day fall sale event.

The depth of discount also noticeably diminished for Prime Big Deal Days 2023 at an overall 24% off average discount, 10 percentage points behind last fall and 8 points under the average discount during Amazon's summertime Prime Day deals. \$400 represented the threshold of savings values for top-tier items during this latest event, visibly below the limit of Prime Day 2023 in July and the \$699 peak savings shown during Amazon's Early Access sale last October.

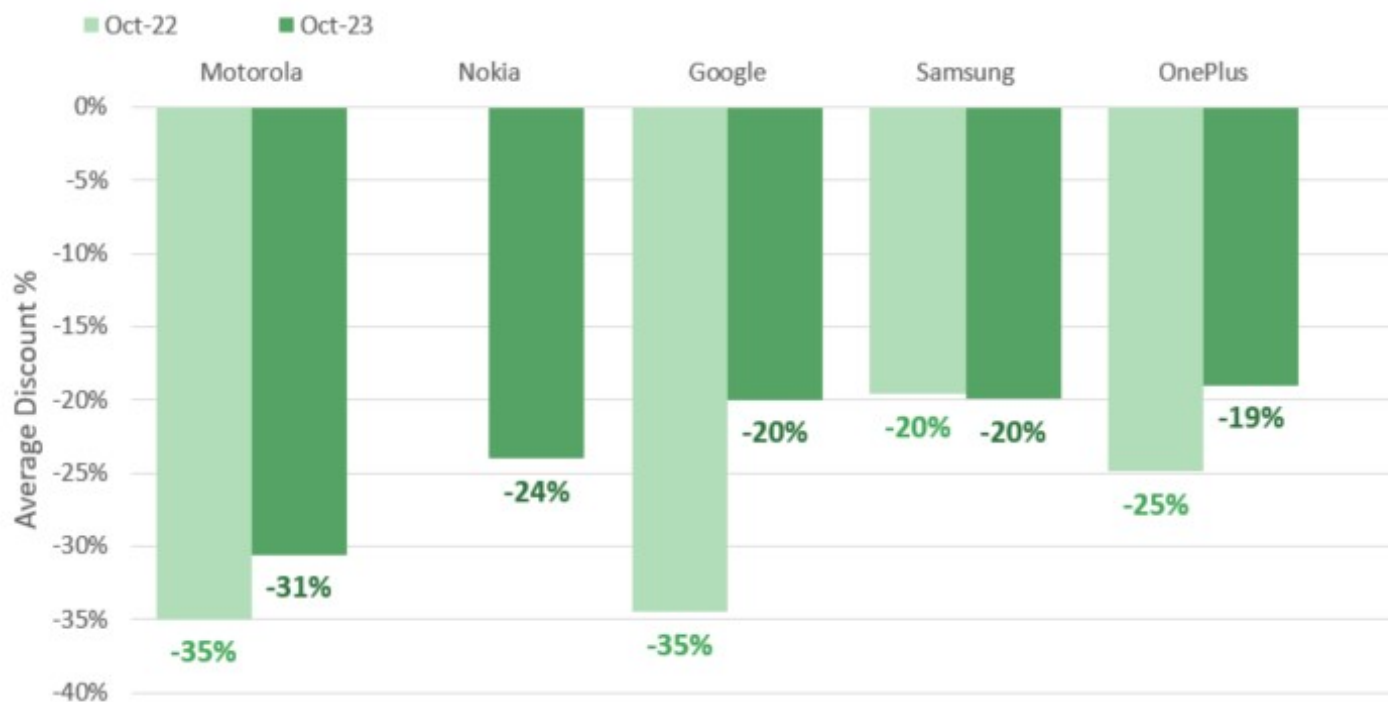
## Smartphones: Amazon October Prime Day Deals by Brand



With many years of consistent participation, Samsung and Motorola are common fixtures of Amazon's Prime Day sale events. After equal deal counts for Prime Day 2023 in July, Samsung pulled ahead of Motorola with the

promotions during Prime Big Deal Days 2023. Samsung's 21 unique deals is ~24% more than the amount past two Amazon Prime-exclusive sale events (vs. 16 & 17 deals), half of which applied to its current Galaxy foldable Galaxy Z generations. An on-year deal count decrease of 40% was not enough to move Motorola to second place rank, especially since returning brands Google and OnePlus reduced their focus to single deal event. Meanwhile, Nokia and Alcatel returned to Prime Big Deal Days 2023 with single deals, marking their first targeted deals since the summertime Prime Day of 2022.

## Smartphones: Amazon October Prime Day Average Discount by Brand



\*designated Prime Day Deals for products shipped & sold by Amazon

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The overall average discount across Amazon's Prime Big Deal Days 2023 was milder than previous Prime sale events at 24% off, widening the 26% to 33% range of the past. Motorola again led discounting for this year's event with a 31% off average savings, 4 points down YoY and 8 points smaller than the July event this year. In terms of average promotion value, Nokia edges out brands like Samsung, Google, and OnePlus, which hover around the 20% discount level, on-year reductions from the latter two brands.



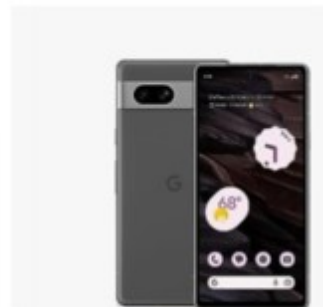
SAMSUNG

# Shop Prime Big Deal Days

## Unlocked Galaxy phones



Up to 25% off Prime Big Deal  
Samsung Galaxy Unlocked Phones



+2 colors/patterns

Google Pixel 7a - Unlocked Android Cell Phone - Smartphone with Wide Angle Lens and 24-Hour Battery - 128 GB - Charcoal

★★★★☆ ~ 605

Prime Big Deal

\$399<sup>00</sup> List Price: \$499.00  
Or \$79.80/month for 5 months

✓prime Same-Day  
FREE delivery Today 2 PM - 6 PM



+1 color/pattern

OnePlus 11 5G | 16GB RAM+256GB | Dual-SIM | Titan Black | US Factory Unlocked Android Smartphone | 5000 mAh battery | 80W Fast charging |...

★★★★☆ ~ 764

Prime Big Deal

\$649<sup>99</sup> List Price: \$799.99  
Or \$130.00/month for 5 months  
Exclusive Prime price

✓prime  
FREE delivery Sun, Oct 15



+2 colors/patterns

Motorola Moto G Power 5G | 2023 | Unlocked | Made for US 6/256GB | 50 MPCamera | Mineral Black, 163.06 x 74.8 x 8.45mm

★★★★☆ ~ 169

Prime Big Deal

\$237<sup>48</sup> List Price: \$299.99  
Exclusive Prime price

✓prime  
FREE delivery Sun, Oct 15  
More Buying Choices  
\$182.01 (19 used & new offers)



Total by Verizon Samsung Galaxy A03s, 32GB, Black - Prepaid...

★★★★☆ 463

Prime Big Deal

-25% \$44<sup>99</sup> List Price: \$59.99

✓prime



TracFone Samsung Galaxy A14 5G, 64GB, Black - Prepaid...

★★★★☆ 6

Prime Big Deal

-24% \$89<sup>99</sup> Typical price: \$119.99

✓prime



Total by Verizon Motorola Moto g Pure, 32GB, Blue - Prepaid...

★★★★☆ 198

Prime Big Deal

-20% \$39<sup>99</sup> Typical price: \$49.98

✓prime



Motorola razr+ | 2023 | Unlocked | Made for US 8/256 | 32 MPCamera | Black

★★★★☆ ~ 97

Prime Big Deal

\$799<sup>99</sup> List Price: \$999.99  
Or \$160.00/month for 5 months  
Exclusive Prime price

✓prime  
FREE delivery Sun, Oct 15



Motorola  
Unlocked  
MPCamera  
163.94x7...

★★★★☆

Prime Big Deal

\$189<sup>98</sup>

Exclusive Price

✓prime On

FREE delivery

More Buying

\$179.99 (9



Motorola  
Battery | 1  
8/512GB  
Blue

★★★★☆

Prime Big Deal

\$474<sup>98</sup>

Exclusive Price



The highest value deals during Amazon's October sale came from Samsung with \$400 off (-22%) its Galaxy S23 Ultra 5G and \$350 off (-25%) the Galaxy S23 5G. These promotions are much lower than the \$750 off and \$700 off its Galaxy Z Fold4 5G received for Prime Day 2022 in July, while its Galaxy S23 family was featured with similar incentives during the summertime event (was \$400 off & \$350 off). Motorola offered the top discount of 56% off with Prime-exclusive deals on the Moto G Play (2023), which was offered for \$56% off (\$45 savings) as well as the Moto G Power (2023) on Total by Verizon, and the One 5G Ace, which featured a 53% discount (\$160 savings). Last year, Motorola offered a 60% off deal and had a maximum discount of 58% during this summer's Prime Day 2023.

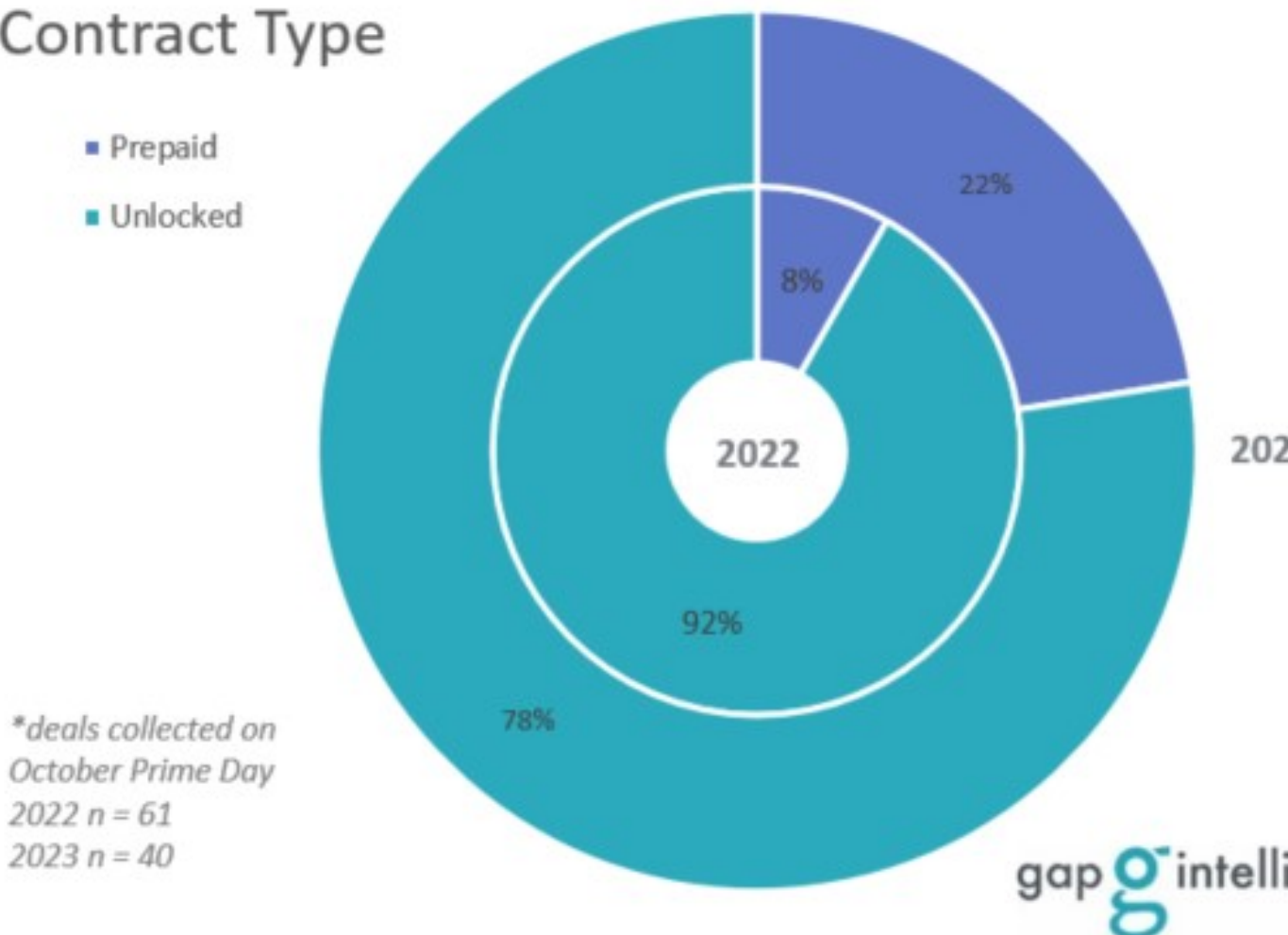
## Smartphones: Amazon October Prime Day Deals by Price Range



Designated Prime Day Deals for products shipped & sold by Amazon

After lower representation during Amazon's Prime Early Access event last fall, Amazon's Prime Big Deal Day returned focus toward the budget smartphone market with 38% of the deals applying to sub-\$200 handsets, on-year, but down 2 points from Prime Day 2023 in July of this year. Consequently, deals on mid-range options were nearly phased out as deals for \$600+ models and premium smartphones remained a big portion of the deal mix from Motorola and Samsung. For last year's Prime Early Access Sale, all four participating brands showcased smartphones priced over \$800, while Google and OnePlus focus just on lower priced items this October.

## Smartphones: Amazon October Prime Day Deals by Contract Type



Like prior Amazon events, Prime Big Deal Days 2023 the ecommerce giant's overall assortment by remaining predominantly unlocked affair. Samsung and Motorola make up the majority of the unlocked deals, which span 9 separate product families from each brand. Prepaid representation is up for this latest sale event, rising to 10% up from Prime Day 2023 in July and more than double last year's exposure with 9 total deals this October. Prime Day 2023, Simple Mobile and Total by Verizon are part of the prepaid segment deal array with Motorola and Alcatel handsets, and are now joined by Tracfone, which offers duos of Motorola and Samsung under \$100.

Smartphones: Amazon Prime Big Deal Days 2023						
Brand	Product	Carrier	Contract Type	Previous Price	Price	Discount
Alcatel	TCL A3X	Tracfone	Prepaid	\$79.99	\$75.19	\$4.80
Google	Pixel 7a 5G	na	Unlocked	\$499.00	\$399.00	\$100.00
Motorola	Edge 5G (2023)	na	Unlocked	\$599.99	\$499.99	\$100.00
	Edge+ 5G (2022)	na	Unlocked	\$729.88	\$474.98	\$254.90
	Edge+ 5G (2022)	na	Unlocked	\$499.99	\$474.98	\$25.01
	Edge+ 5G (2023)	na	Unlocked	\$799.99	\$649.99	\$150.00
	Moto G 5G (2023)	na	Unlocked	\$249.99	\$189.98	\$60.01
	Moto G Play (2023)	Tracfone	Prepaid	\$99.99	\$54.99	\$45.00
	Moto G Play (2023)	Total by Verizon	Prepaid	\$79.99	\$34.99	\$45.00
	Moto G Power 5G (2023)	Tracfone	Prepaid	\$118.95	\$78.95	\$40.00
	Moto G Power 5G (2023)	Total by Verizon	Prepaid	\$99.99	\$59.99	\$40.00
	Moto G Pure	na	Unlocked	\$159.99	\$109.99	\$50.00
	Moto G Pure	Simple Mobile	Prepaid	\$59.61	\$39.99	\$19.62
	Moto G Stylus (2023)	na	Unlocked	\$125.60	\$87.10	\$38.50
	Moto G Stylus 5G (2023)	na	Unlocked	\$214.87	\$99.86	\$115.01
Nokia	One 5G Ace	na	Unlocked	\$299.99	\$139.99	\$160.00
OnePlus	razr+ 5G (2023)	na	Unlocked	\$999.99	\$799.99	\$200.00
Nokia	C200	Simple Mobile	Prepaid	\$59.99	\$45.70	\$14.29
OnePlus	11 5G	na	Unlocked	\$546.67	\$396.67	\$150.00

Samsung	Galaxy A03s	Tracfone	Prepaid	\$47.30	\$17.30	\$30.00
	Galaxy A14 5G	Tracfone	Prepaid	\$119.00	\$89.99	\$29.01
	Galaxy A53 5G	na	Unlocked	\$192.74	\$42.74	\$150.00
	Galaxy S22 5G	na	Unlocked	\$849.99	\$749.99	\$100.00
	Galaxy S22 5G	na	Unlocked	\$849.99	\$599.00	\$250.99
	Galaxy S22 Ultra 5G	na	Unlocked	\$864.29	\$799.99	\$64.30
	Galaxy S22 Ultra 5G	na	Unlocked	\$895.99	\$799.99	\$96.00
	Galaxy S22 Ultra 5G	na	Unlocked	\$921.77	\$804.77	\$117.00
	Galaxy S22 Ultra 5G	na	Unlocked	\$950.00	\$899.99	\$50.01
	Galaxy S23 5G	na	Unlocked	\$799.99	\$649.99	\$150.00
	Galaxy S23 5G	na	Unlocked	\$859.99	\$709.99	\$150.00
	Galaxy S23 Ultra 5G	na	Unlocked	\$1,199.99	\$949.99	\$250.00
	Galaxy S23 Ultra 5G	na	Unlocked	\$1,379.99	\$1,029.99	\$350.00
	Galaxy S23+ 5G	na	Unlocked	\$999.99	\$799.99	\$200.00
	Galaxy S23+ 5G	na	Unlocked	\$1,119.99	\$869.99	\$250.00
	Galaxy Z Flip4 5G	na	Unlocked	\$999.99	\$799.99	\$200.00
	Galaxy Z Flip4 5G	na	Unlocked	\$999.99	\$899.99	\$100.00
	Galaxy Z Flip5 5G	na	Unlocked	\$999.99	\$799.99	\$200.00
	Galaxy Z Flip5 5G	na	Unlocked	\$1,119.99	\$919.99	\$200.00
	Galaxy Z Fold5 5G	na	Unlocked	\$1,799.99	\$1,399.99	\$400.00
	Galaxy Z Fold5 5G	na	Unlocked	\$1,919.99	\$1,519.99	\$400.00

\*deals collected between 10/10/23 & 10/11/23

\*excludes refurb & 3rd party items



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## INDUSTRY REPORTS

### Walmart Announces Next-Gen Fulfilment Center Location



Walmart is set to open its fifth next-generation fulfillment center in Stockton, California, in 2026. The 900,000 square foot facility will enable the retailer to fulfill online orders on the West Coast faster and more efficiently. Walmart Fulfillment Services (WFS), a fee-based program providing services including storing, picking, packing, shipping and customer service, will also utilize the space to fulfill third-party Walmart Marketplace items. The facility features an automated, high-density storage and retrieval system that streamlines a manual, 12-step process down to two steps. It will offer double the storage capacity and twice the number of customer orders Walmart can fulfill in a day, enabling next- or two-day shipping.

The Stockton fulfillment center will employ more than 1,000 Walmart associates, including tech-focused jobs. Walmart is strategically locating these centers to pair most effectively with its 4,700 stores and 210 distribution centers to get products to customers fast and efficiently. Combined with its traditional fulfillment centers, Walmart could reach 95% of the US population with next- or two-day shipping and could also offer same-day delivery to 80% of the US population from its stores.

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## Retailers Slowly Adopting AI for Supply Chain Usage

A new survey by Blue Yonder reveals that retail executives are not deploying artificial intelligence (AI) in their supply chains in great numbers. The survey, "Are Retailers Prepared for the AI Era," found that 48% of retail executives are using AI for fulfillment optimization, labor scheduling and workforce optimization (45%), demand forecasting (42%), inventory placement (42%). Respondents indicated lower levels of AI usage for other supply chain tasks, such as market trend predictions and avoidance (26%), inventory optimization via keeping dynamic safety stock up to date (18%), improving accuracy of estimated ship dates (16%), and improving order picking accuracy (7%).

Some of the barriers to AI adoption include security risks (45%), budget limitations (42%), lack of trust in outside recommendations (41%), talent limitations (39%), lack of organizational strategy or clear use case (37%), clean data/complex data environments (26%), and lack of organizational knowledge (25%). However, 96% of respondents made further AI adoption a priority going forward, with 95% already using AI technology in at least one application. Additionally, 85% say they are extremely or very knowledgeable about AI and 85% say they have no hesitation in applying AI to their business operations.

The survey, conducted in partnership with a third-party company, polled 150 retail executives in August 2020 via an online, invitation-only survey. Among respondents, 2% work in companies with annual revenue of \$250 million or less; 22%, \$250 million to \$1 billion; 67%, \$1 billion to \$10 billion; and 9%, more than \$10 billion. About half were Director level and above, with 22% being C-suite level. About half were grocery retailers (49%), with 36% being hardline retailers (36%) and softline retailers (15%).

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## Companies Continue to Regionalize Supply Chains

Almost every supply chain leader (95%) faced challenges during the past year, with all of them working to make their supply chains more resilient and flexible, according to a new McKinsey & Company survey. To that end, 71% reported reorganizing their suppliers to be closer to markets, a 34% increase from last year driven primarily by food and consumer industries. The main challenge, however, is a lack of qualified staff; 92% reported not having enough skilled staff to operate digitally enabled supply chains, with no improvement in the last calendar year. Other challenges include:

- 42% reported nearshoring production (up 25% YoY)
- 44% increased backup production sites in the last year (up 22% YoY)
- 50% said their supply chains are dependent on another region
- On the other hand, 64% are regionalizing their supply chains
  - 89% are trying to reduce dependency on other regions and focus on Western Europe and South America
- Only 8% reported having enough in-house digital talent to digitalize supply chains (up from 1% last year)

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## Survey: 44% of Holiday Shoppers Plan to Shop During Pre-Season Events

The holiday shopping season continues to expand, with 44% of shoppers reporting they plan to shop during pre-season events like Amazon Prime Day, [according to a recent survey from Mintel](#). Traditional shopping milestones

Friday remain popular, however, especially due to rising prices for consumers. Overall, Mintel forecasts winter retail sales will grow 5.4% to \$1.07 trillion. Other insights include:

- 45% plan to participate on Black Friday or Cyber Monday
  - 28% of shoppers agree it's even more important to shop during these events due to inflation
- 42% plan to purchase fewer gifts due to inflation
  - 24% plan to switch to more affordable retailers due to inflation
- 59% of holiday season shoppers want to spend as little money as possible

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