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US Digital Weekly Business Review [go/digitalwbrs](https://go.digitalwbrs)

WBR Master Folder (with all past decks)

Summary

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Symphony resources

US Promotions:

[go/pixelpromotions](https://go.pixelpromotions)

US Traffic Dashboards:

go/pixel-online-us

US Promo Trackers:

go/pixelpromotracker

US Exec Dashboard:

go/pixelperformance

Historical Digital WBRs

2022

September

W1 5 Sep	W2 12 Sep	W3 19 Sep	W4 26 Sep
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October

W1 3 Oct	W2 10 Oct	W3 17 Oct	W4 24 Oct	W5 31 Oct
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November

W1 7 Nov	W2 14 Nov	W3 21 Nov	W4 28 Nov
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December

W1 5 Dec	W2 12 Dec	W3 19 Dec
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2023

January

W1 2 Jan	W2 9 Jan	W3 16 Jan	W4 23 Jan	W5 30 Jan
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February

W1 6 Feb	W2 13 Feb	W3 20 Feb	W4 27 Feb
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March

W1 6 Mar	W2 13 Mar	W3 20 Mar	W4 27 Mar
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April

W1 3 Apr	W2 10 Apr
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Execution Opportunities / Gaps

Call out	Detail	First Reported on
Low / No placements for 'Get For Free' promos on AT&T	P7 Pro and P7 offers not present on AT&T Deals pages	<u>27 Feb</u> T-Mo sees slight improvement in placements, but AT&T remains low
Lower promotion publicized on BestBuy for P7 / Pro, falling visibility for stronger carrier offers	<ul style="list-style-type: none"> Actual offers on PDP \$300 & \$250 for P7 Pro/P7 resp. Publicized offer on Deals Page is \$150 Carrier trade-ins of upto \$900 have <u>lower visibility</u> 	<u>13 Mar</u> (Fixed)

Other Insights

Call out	Detail	Suggested Action
Sales dwindling on Verizon with trade-in discontinued, impact of improved non-trade in promo to be assessed	<ul style="list-style-type: none"> Pixel unique discounts on VZN improve by upto \$180 post NLA trade-ins being taken off last week (UPG TI still available) Competition offers follow suit, with falling trade-ins 	Study absolute and relative performance of promos to competition on carrier
Samsung seems to be gaining unequivocal share on Android on T-Mobile and AT&T	<ul style="list-style-type: none"> SS is regaining Android share & dominating placements ahead of A54 launch, while Pixel has low visibility 	Negotiate with AT&T & T-Mo to offer equal / comparable Android placement per carrier agreements

Sales Drivers

- Sales dropped strongly on VZN for both P7 and P7 Pro despite stronger placements - **potentially owing to removal of trade-ins LW**
- In contrast to this, P7 sales **grew for third consecutive week** on AT&T, suggesting good performance on non-TI promotion on the carrier

Sales

		Pixel 7		Pixel 7 Pro	
Total		9,433		6,641	
WoW		-21%		-26%	
Sales					
Wk 14		VZN	TMO	AT&T	BB
		4,690	3,385	3,650	4,349
		Δ-47%	Δ-9%	Δ-10%	Δ-1%
Mkt Units					
As of Wk 11		150K	Δ 10%	1.5M	Δ -5%
Mkt Share					
As of Wk 11		19.1%	Δ -1.4%	2.4%	Δ 0.3%

Significant drop in total Pixel sales. P7 drop led by VZN, with AT&T, T-Mo & BBY selling **consistent / more P7 units**

Traffic

	VZN	TMO	AT&T	BB
Total Partner Traffic	11.6M Δ -839.2K	45.1M Δ -277.9K	39.2M Δ 1.3M	20.9M Δ -1.4M
Google PDP Traffic	18.3K Δ 1.3K	9.5K Δ -2.5K	3.3K Δ -4.1K	63.6K Δ -9.7K
Google Share of Traffic	6.8% Δ 1.5%	5.2% Δ -0.9%	2.5% Δ -2.3%	28.9% Δ -2.2%

Pixel continues to have <10% share

mobile traffic

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Sales (Wk of April 2)

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Traffic (Wk of April 10)

Total Partner Traffic

Google PDP Traffic

Google Share of Traffic

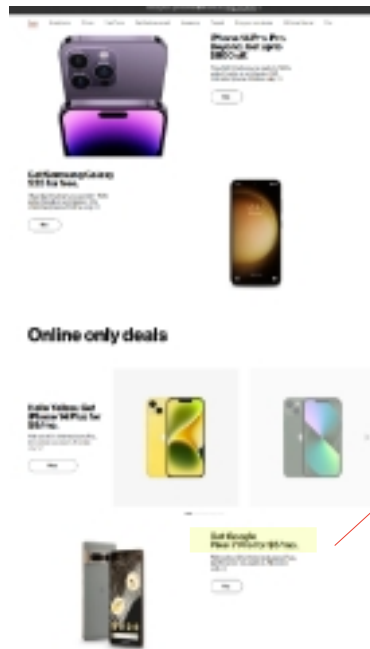
Pixel continues to have <10% share

mobile traffic

Strong improvements in placements on Verizon and T-Mobile however not on par with comp., AT&T visibility

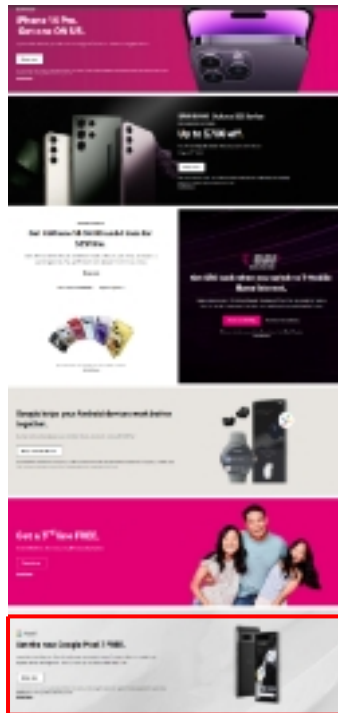
worsens

Verizon



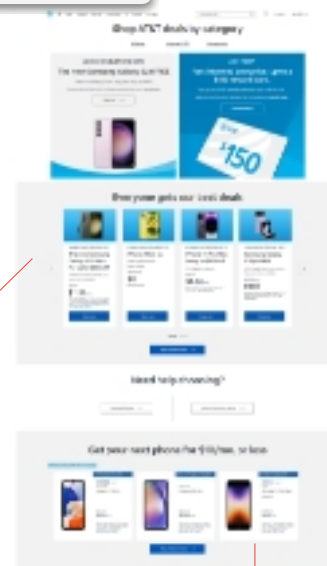
VZN: Pixels Promo Messaging on Deals page strengthens as prices drop and placements improve (4F) Lack of homepage visibility

T-Mobile



T-Mo: Strong Promotion on Deals Page, improvement in placement (6F)

AT&T



P7 which appeared last week here on deals page now replaced by SE3

Pixel Continues to have no placements on Home page




Strong scope of placements with other premium segment OEM devices on Deals / Phone Deals pages

Promotion Changes (As of 10/04)









































Pixel unique discounts on VZN **improve** post the drop in TI last week, while **Apple and Samsung premium models weaken (trade-in)**

\$100 drop in Samsung unique discounts on T-Mo both plans

Samsung continues to **strengthen unlocked discounts** (BestBuy & Amazon)

	verizon	T Mobile	 AT&T	 Carriers + Unlckd	 amazon
P7/P7 Pro	P7 Pro- Unique disc ↑ to \$720 P7- UPG TI available, Unique disc. ↑ to \$700	No change	No change	BBY TMO- TI offers removed BBY VZN- TI launched for UP	P7 Pro - 512 GB Uniq disc ↑ to \$395
P6 Pro	No change	No change	No change	Unlckd- OOS	P6 Pro- 256 available
i13 Pro/Max	No change	i13 Pro- 128 GB unavailable	No change	BBY VZN- i13 Pro Max 512GB unavailable	No change
S23+/Ultra	S23 Plus & Ultra- Trade in ↓ from \$1000 to \$800	S23 Plus- Uniq. Disc ↓ on MM New line by \$100 S23 Ultra- Uniq. Disc ↓ on MM New line by \$100	No change	BBY Unlckd [S23 Ultra] -256/512 Uniq disc ↑ \$200 [S23+]- 256GB Uniq disc ↑ \$150	S23 Ultra - Uniq disc ↑ \$200
Flip/Fold4	Z4- Trade in ↓ from \$1000 to \$800	Z Fold 4-512 GB unavailable Z Flip 4- 256 GB unavailable	No change	No change	No change
S22+ /Ultra	S22 Plus - Bundle offer available S22 Ultra - Bundle offer available	S22 Plus- uniq disc ↓ on MM New line by \$100 S22 Ultra- uniq disc ↓ on MM New line by \$100	No change	BBY-TMO-128/256 GB disc ↓ to \$250 512 GB Disc ↑ to \$350 BBY-ATT- Uniq disc ↓ \$200 NL, \$100 UP BBY-Unlckd- Disc ↑ to \$150	S22 Plus - Uniq Disc. ↑ to \$ 250
Z Fold3	No change	No change	No change	No change	No change
A53	Unique Discount unavailable	No change	No change	No change	A53 MSRP ↑ by \$10
i14 Pro/Pro Max	i14 Pro/Max- Trade in ↓ from \$1000 to \$800	No change	No change	No change	No change
i14/ i14 Plus	Bundle value on iPad ↓ to \$200	i14 Plus MSRP ↑ by \$30	No change	BBY-ATT NLA Uniq disc removed	No change

OEM logo by order of appearance | ☐ Pixel Risk

Partner	Pixel 7/Pro offer	Home Page	Deal Page	Listings Page
	<p>Get Pixel 7 Pro at \$5/mo with select trade-in and select 5G plans. Online Only. Plus \$200 when you switch (<i>Deals Page</i>) (\$200 Switch + \$720 Uniq Disc + Upto \$800 Upg TI)</p> <p>Get Pixel 7 for \$0/mo (<i>Listings Page</i>) (\$200 Switch + \$700 Uniq Discount + Upto \$700 Upg TI)</p>	  <input type="checkbox"/>	  	  
	<p>Get the Google Pixel 7 Pro for \$800 off with T/I (<i>Listings page</i>)</p> <p>P7 at \$10/mo, no trade-in required (<i>Listings Page</i>) (\$300 Discount + Upto \$380 AT&T Promotional cards on TI)</p>	  <input type="checkbox"/>	  <input type="checkbox"/>	  
	<p>Get the Google Pixel 7 Pro for \$37.50/mo for 24 mo (<i>Listings Page</i>) (\$500 Discount + Upto \$600 TI)</p> <p>Get the Pixel 7 for FREE (<i>Deals Page</i>) (\$500 Discount + Upto \$600 TI)</p>	  <input type="checkbox"/>	  	  
	<p>Save \$150 instantly on unlocked Google Pixel 6a, Pixel 7 and Pixel 7 pro phones. (<i>Phone Deals</i>) P7 Pro: \$300 Unique Discount (\$599 Activate Today) P7: \$250 Unique Discount (\$349 Activate Today)</p>	  <input type="checkbox"/>	   (<i>Phone Deals page</i>)	  
	P7 Pro: \$150 off on listing price, P7: \$150 off on listing price	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	 <input type="checkbox"/> <input type="checkbox"/>	   (<i>Phone Deals page</i>)

Pixel at disadvantage Pixel at advantage Pixel on par

			Premium & Ultra Prem Segment						Mid Segment				Entry Segment		
			P7 Pro (\$899)	i14 Pro (\$999)	i14 Plus (\$900)	S23 Ultra (\$1200)	S23+ (\$1000)	Flip4 (\$1000)	P7 (\$700)	i14 (\$800)	S23 (\$799)	S22 (\$700)	P6a (\$500)	SE3 (\$430)	A54 (\$500)
Select/Prem Unitd	NLA	Switcher	200	200	200	200	200	200	200	200	200	200	-	-	-
		Discount	720↑	-	720	-	-	-	700↑	-	-	520	500	429	140
		BOGO	-	-	-	-	-	-	-	-	-	-	-	-	-
		Max TI	0	800↓	0	800↓	800↓	800↓	0	800	800	-	-	-	-
	UPG	Discount	-	-	-	-	-	-	-	-	-	-	200	-	-
		BOGO	-	-	-	-	-	-	-	-	-	-	-	-	-
		Max TI	800	800	800	800	800	800	700↑	800	800	0	-	-	-
All Unitd	NLA	Switcher	200	200	200	200	200	200	200	200	200	200	-	-	-
		Discount	720↑	-	720	-	-	-	700↑	-	-	520	500	429	140
		BOGO	-	-	-	-	-	-	-	-	-	-	-	-	-
		Max TI	-	800↓	-	800↓	800↓	800↓	-	800	800	-	-	-	-
	UPG	Discount	-	-	-	-	-	-	-	-	-	-	200	-	-
		BOGO	-	-	-	-	-	-	-	-	-	-	-	-	-
		Max TI	-	-	-	-	-	-	-	-	-	-	-	-	-

- Pixel unique discount improves on both plans (P7 Pro improves to \$720 from \$540 → now \$5/mo; P7 to \$700 from \$520 → now \$0/mo)
- \$200 drop in trade-in on Premium Apple and Samsung models (\$1000 to \$800; i14 Pro, S23 Ultra, S23 Plus, Z Flip4)

Pixel at disadvantage Pixel at advantage Pixel on par

			Premium & Ultra Prem Segment						Mid Segment				Entry Segment		
			P7 Pro (\$899)	i14 Pro (\$999)	i14 Plus (\$929)	S23 Ultra (\$1199)	S23+ (\$999)	Flip4 (\$999)	P7 (\$599)	i14 (\$799)	S23 (\$799)	S22 (\$699)	P6a (\$449)	SE3 (\$429)	A54 (\$429)
Magenta Max	NLA	Discount	501	-	-	700↓	700↓	700↓	500	-	700↓	700	449	215	-
		BOGO	-	350	350	-	-	-	-	350	-	-	-	-	-
		Max TI	600	1000	900	400	400	400	600	830↑	400	400	300	0↓	-
	UPG	Discount	-	-	-	-	-	-	-	-	-	-	-	-	-
		BOGO	-	350	350	-	-	-	-	350	-	-	-	-	-
		Max TI	600	0↓	0↓	400	400	400	600	0↓	400	400	300	0↓	-
Mainstream	NLA	Discount	500	-	-	400	400	400	500	-	400	400	449	215	-
		BOGO	-	350	350	-	-	-	-	350	-	-	-	-	-
		Max TI	300	830↑	830↑	400	400	400	300	830↑	400	400	300	0↓	-
	UPG	Discount	-	-	-	-	-	-	-	-	-	-	-	-	-
		BOGO	-	350	350	-	-	-	-	350	-	-	-	-	-
		Max TI	300	0↓	0↓	400	400	400	300	0↓	400	400	300	0↓	-

- S23 series and Flip4 sees **drop in unique discount** from \$800 to \$700
- Apple models see slight **bump up in NLA trade-in** (both plans; from \$800 to \$830), while **UPG TI taken off** (both plans; was earlier \$400)
- Trade-in offer of \$400 **taken off for SE3** for (NLA & Upgrade, both plans)