

# Index

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

WBR Master Folder (with all past decks)

### Summary

---

1

[Business summary](#)

2

[Pixel Compliance Review](#)

3

[Pixel Promotional Gaps](#)

4

5

[Brand Prominence](#) (iOS, Android, Desktop)

6

7

[Appendix / Glossary](#)

### Symphony resources

---

**US Promotions:**

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

**US Traffic Dashboards:**

[go/pixel-online-us](https://go/pixel-online-us)

**US Promo Trackers:**

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

**US Exec Dashboard:**

[go/pixelperformance](https://go/pixelperformance)

# Historical Digital WBRs

2022

September

[W1 |](#)  
5 Sep

[W2 |](#)  
12 Sep

[W3 |](#)  
19 Sep

[W4 |](#)  
26 Sep

October

[W1 |](#)  
3 Oct

[W2 |](#)  
10 Oct

[W3 |](#)  
17 Oct

[W4 |](#)  
24 Oct

[W5 |](#)  
31 Oct

November

[W1 |](#)  
7 Nov

[W2 |](#)  
14 Nov

[W3 |](#)  
21 Nov

[W4 |](#)  
28 Nov

December

[W1 |](#)  
5 Dec

[W2 |](#)  
12 Dec

[W3 |](#)  
19 Dec

2023

January

[W1 |](#)  
2 Jan

[W2 |](#)  
9 Jan

[W3 |](#)  
16 Jan

[W4 |](#)  
23 Jan

[W5 |](#)  
30 Jan

February

[W1 |](#)  
6 Feb

[W2 |](#)  
13 Feb

[W3 |](#)  
20 Feb

[W4 |](#)  
27 Feb

March

[W1 |](#)  
6 Mar

[W2 |](#)  
13 Mar

[W3 |](#)  
20 Mar

[W4 |](#)  
27 Mar

## Execution Opportunities / Gaps

Call out	Detail	First Reported on
Incorrect Promotion Messaging on Verizon Deals Page	Promo banner shows “P7 Pro at \$10 / mo with select Trade In”. However the PDP mentions the promotion is applicable for all users (non trade-in as well).	30 Mar
Low / No placements for ‘Get For Free’ promos on AT&T and T-Mobile Deals pages	<ul style="list-style-type: none"> <li>● Missing on AT&amp;T Deals page</li> <li>● Present on T-Mobile deals page at bottom after other OEM bundle offers, etc.</li> </ul>	<a href="#">27 Feb</a>
Lower promotion publicized on BestBuy for P7 / Pro	<ul style="list-style-type: none"> <li>● Actual offers on PDP \$300 &amp; \$250 for P7 Pro/P7 resp.</li> <li>● Publicized offer on Deals Page is \$150</li> </ul>	<a href="#">13 Mar</a> (Monica is actioning with Marketing)

## Other Insights

Call out	Detail	Suggested Action
Sales Uplift on Verizon: Pixel has lower Trade In, however non-Trade In promo seems to be working well	<ul style="list-style-type: none"> <li>● Unique discount worth \$540 launched for Pixel 7 Pro</li> <li>● Competition widened trade-in offers for All Unltd plans</li> <li>● Pixel sales improved on VZN indicating good performance of Non-TI promo despite lower TI</li> <li>● Similar observation on AT&amp;T in last 3 weeks</li> </ul>	Target upto Deals page placements, Correct promo messaging on Verizon
Increasing promotions by Apple on i14 series post i13 promotions -> Implications for Pixel 7 promotions	<ul style="list-style-type: none"> <li>● Increased offers on i13 series in the last 3 weeks. Now OOS / delisted, &amp; widening audience for i14 promos</li> <li>● Implications for Pixel N-1 ongoing promotions?</li> </ul>	Evaluate P7 / Pro promo / placements
	<ul style="list-style-type: none"> <li>● i14 Yellow helped Apple regain placements post S23</li> </ul>	

## Sales Drivers

- On **VZN**, both P7 / Pro saw slight sales growth and higher conversion, owing to **good performance** of non-TI unique discounts (\$540 - \$520 off)
- On AT&T and T-Mo, total P7 sales dipped, **in line with low visibility on Deals pages** and [T-Mo] **removal** of Watch bundle (**Watch sales ↓ 60% WoW**)

### Sales

Pixel 7		Pixel 7 Pro	
Total	10,869		8,998
WoW	-11%		-3%
Sales	Wk 13		
	VZN	TMO	AT&T BB
	8,770 Δ5%	3,709 Δ-10%	3,015 Δ-18% 4,373 Δ-17%
TAM	As of Wk 10		
	150K	Δ10%	1.5M Δ-5%
Mkt Share	As of Wk 10		
	21.2%	Δ 6.7%	3.1% Δ 0.3%

**WoW Fall** in total Pixel sales (BBY ↓ after strong W12 growth); **VZN CVR ↑** potentially owing to stronger promos, **T-Mo** on 6th WK of decline, in line with ↓ promos

### Traffic<sup>1</sup>

	VZN	TMO	AT&T	BB
Total Partner Traffic	12.5M Δ -260.0K	45.0M Δ -1.2M	37.5M Δ -440.0K	22.0M Δ -40.0K
Google PDP Traffic	17.8K Δ -8.8K	11.6K Δ 569.0	9.1K Δ -53.0	74.2K Δ -7.2K
Google Share of Traffic	5.3% Δ -2.2%	5.9% Δ 0.6%	4.8% Δ -0.2%	31.0% Δ 1.2%

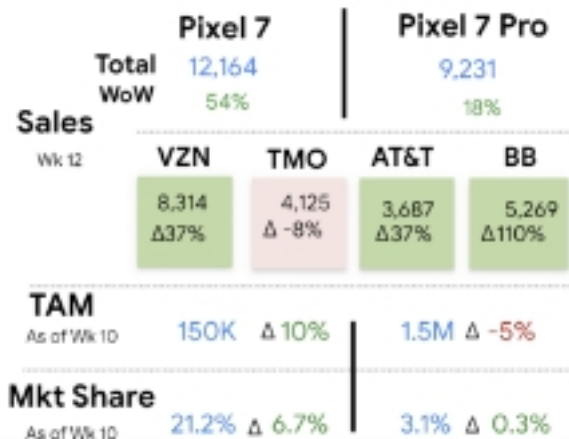
**Both partner & Google traffic 2nd WK ↓**  
**strong BBY**  
**SoT**

<sup>1</sup>Updated upto 28 Mar as per SW latest data

## Sales Drivers

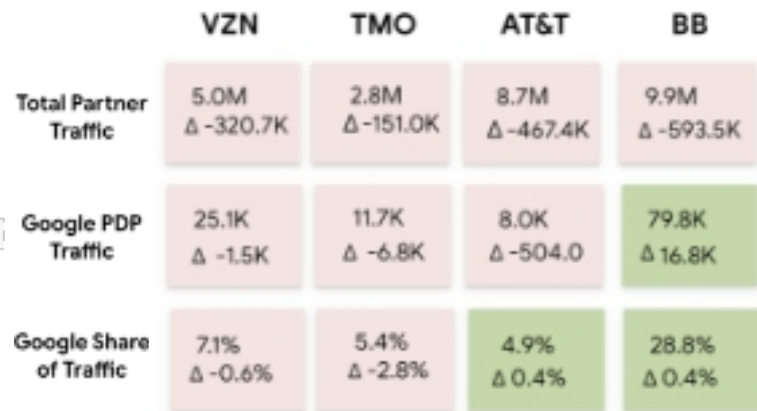
- On BBY, Pixel saw **highest placements in six months** (upto 26% share) + **increased promotions** → potentially driving **growth in sales**.
- On T-Mobile Pixel's bundle offer with Watch ended + **low visibility on Deals page** for P7/Pro Get Free offer, potentially contributing to sales drop

### Sales



**Growth** in total Pixel sales (upto 110% on BBY post improved disc); P7 sales ↑ strongly led by BBY and VZN.  
Both TAM and Market Share for mid-segment **rose**

### Traffic



**Both partner & Google traffic ↓**



## Potential to improve performance of our strong promotions on carriers

### Verizon



**Get Google Pixel 7 Pro for \$10/mo.**

With select trade-in and select 5G Unlimited plans. Online only. Plus, \$200 when you switch. ☑️

See

Verizon Promo Messaging on Deals page incorrectly highlights “Select Trade-In”, while it is available for all consumers on the product page.

### T-Mobile



T-Mo: Strong Promotion on Deals Page, but visible at bottom after all other OEM promos






### AT&T





















































AT&T: Strong P7 Pro for Free promo (trade-in) and well-performing P7 non-TI, but no placements on any of the key landing pages

## Promotion Changes

**P7 / Pro Offer on VZN improved with \$540 discount, while on T-Mo bundle offer with Watch ended** (Non-Trade In promo working well over lower TIs)  
**i14 promos increasing [VZN] post i13 promotions strong performance (OOS now). SS offers increased on partners (TI on VZN, mem. upgrade on BB)**

	 verizon	 T Mobile	 AT&T	 Carriers + Unlckd	 amazon
P7/P7 Pro	P7 Pro- Uniq disc↑ by \$540	Bundle offer of \$201 X	No change	No change	No change
P6 Pro	No change	No change	No change	No change	Uniq disc ↑ to \$393 AMZN
i13 Pro/Max	Unlisted on website	i13 Pro Max-unavailable	No change	No change	No change
S23+/Ultra	No change	No change	No change	[S23 Ultra] BBY-Unlockd 512 GB Uniq disc↑ \$180 256, 1024 GB - Uniq disc X BBY-TMO- TI launched with max TI of \$800	S23 Ultra- 256 GB uniq disc X 512 GB uniq disc ↑ \$180
Flip/Fold4	TI offer extended for All Unlimited plans on NL	No change	No change	No change	No change
S22 Ultra	TI offer extended for All Unlimited plans on Upgrade	No change	No change	BBY-TMO-128/256 GB Disc↑ to \$350 512 GB disc ↓ to \$250	No change
Z Fold3	No change	No change	No change	BBY-VZN Disc↑ to \$1400 BBY-ATT Disc↑ to \$500	Available this week
A53	Uniq disc ↓ to \$140	No change	No change	No change	A53 ↓ \$50 drop in unique discount
i14 Pro/Pro Max	TI offer extended for All Unlimited plans on NL	No change	No change	No change	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 \$10/mo with select trade-in and select 5G plans. Online Only. Plus \$200 when you switch (<i>Home page</i>) (\$200 Switch + \$540 Uniq Disc + Upto \$900 NLA TI / \$800 Upg TI)</p> <p>Get Pixel 7 for \$5/mo (<i>Listings Page</i>) (\$200 Switch + \$520 Discount + Upto \$700 Upg TI)</p>	  	  	  
	<p>Get the Google Pixel 7 Pro free with T/I (<i>Listings page</i>) (Guaranteed TI \$939)</p> <p>P7 at \$10/mo, no trade-in required (<i>Listing Page</i>) (\$300 Discount + Upto \$380 AT&amp;T Promotional cards on TI)</p>	  	  	  
	<p>Save upto \$600 on the P7 Pro (<i>Deals 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>	  	  	  
	<p>Save \$150 instantly on unlocked Google Pixel 6a, Pixel 7 and Pixel 7 pro phones. (<i>Phone Deals</i>)</p> <p>P7 Pro: \$300 Unique Discount (\$599 - \$799 Activate Today / \$749 - \$949 Activate Later)</p> <p>P7: \$250 Unique Discount (\$349 - \$449 Activate Today / \$449 - \$549 Activate Later)</p>	  	   (Phone Deals page)	  
	P7 Pro: \$150 off on listing price, P7: \$150 off on listing price	  	  	  



Pixel at disadvantage Pixel at advantage Pixel on par

			Premium & Ultra Prem Segment						Mid 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)
Select/Prem Unltd	NLA	Switcher	200	200	200	200	200	200	200	200	200	200
		Discount	540↑	-	720	-	-	-	520	-	-	520
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	900	1000	0	1000	1000	1000	0	800	800	-
	UPG	Discount	-	-	-	-	-	-	-	-	-	-
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	800	800	800	800	800	800	700	800	800	0
All Unltd	NLA	Switcher	200	200	200	200	200	200	200	200	200	200
		Discount	540↑	-	720	-	-	-	520	-	-	520
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	-	1000↑	-	1000	1000	1000↑	-	800↑	800	-
	UPG	Discount	-	-	-	-	-	-	-	-	-	-
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	-	-	-	-	-	-	-	-	-	-

- Unique discount worth \$540 launched for Pixel 7 Pro - NL (both plans)
- Post S23 offers being extended to All Unltd customers, Z Flip4 TI extended (Upto \$1000 off) thus putting P7 Pro at disadvantage
- Similar widening of potential consumer base (AI Unltd) for i14 Pro (Upto \$1000 off) and i14 (Upto \$800 off) thus putting P7/Pro at disadvantage

			<div>Pixel at disadvantage</div>						<div>Pixel at advantage</div>		<div>Pixel on par</div>	
			Premium & Ultra Prem Segment						Mid Segment			
			P7 Pro (\$939)	i14 Pro (\$999)	i14 Plus (\$900)	S23 Ultra (\$1200)	S23+ (\$1000)	Flip4 (\$1000)	P7 (\$739)	i14 (\$800)	S23 (\$799)	S22 (\$700)
Eligible Unltd	NLA	Discount	-	-	-	-	-	-	380	-	-	160
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	939	800	800	800	800	999	350*	800	799	350
	UPG	Discount	-	-	-	-	-	-	380	-	-	160
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	939	800	800	800	800	999	350*	800	799	350

\* P7 Max T/I is less than competition, however the tiered promo performed better than T/I offer due to broader eligibility (no trade-in required)