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US Digital Weekly Business Review go/digitalwbrs

WBR Master Folder (with all past decks)

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Symphony resources

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go/pixelpromotions

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go/pixelperformance

Historical Digital WBRs

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Execution Opportunities / Gaps

Call out	Detail	First Reported on
Drastic fall on ratings and reviews for Pixel devices on AT&T	While S23 Ultra gained 200 reviews WoW, <ul style="list-style-type: none">● P7's rating dropped from 4.8 → 1.5, (# of reviews fell from 72 → 2)● P7 Pro's dropped from 4.7 → 2.2 (# reviews fell from 127 to 13)● P6a ratings dropped from 4.4 → 3.6 (# reviews 16 to 5)	<u>2 May</u>
Verizon Pixel 7 Bundle (Mother's Day deal) not correctly updated on PDP	While VZN Deals & Phone Deals pages feature a new Pixel 7 bundle , the PDP still mentions a generic watch promo (instead of Pixel Watch) + Galaxy Tab A7 Lite promo missing	<u>1 May</u>
Low / No placements for strong promos on AT&T	<ul style="list-style-type: none">● Pixel bundle launched on bottom fold of Deals pages● No key placement for on key landing pages	<u>17 Apr</u>
Lower promotions than actual on Best Buy and T-Mobile	<ul style="list-style-type: none">● While BBY banners highlight max TI of \$200, P7 Pro Unlocked PDP specify max TI of \$530, and actual savings go as high as \$715 (Ref)● On T-Mo, P7 Pro deals specify 'savings of \$500 on TI', but TI models as i14 Pro Max yield values of >\$600<ul style="list-style-type: none">○ Competitor models are seen to advertise full value of TI	<u>1 May</u>

Other Insights

Call out	Detail	Suggested Action
Pixel promo competitiveness remains low on T-Mo, while both Apple and Samsung have Go5G Plus promos	<ul style="list-style-type: none">● Both Apple and Samsung launched Go5G (Plus) promos LW; while Pixel max TI fell from to \$500 LW; Samsung price messaging further improved this week	Improve promos to effectively compete and capture customers on the new plan
Rising traffic for Fold4, new promotion on BBY	<ul style="list-style-type: none">● Fold4 saw 35% WoW traffic growth last week● Samsung has also launched a new \$500 discount on Fold4 on BBY Unlocked this week	Monitor Samsung promotions closely

Updated as of 1 May
Refreshed Mondays

Sales Drivers

- Shift in consumer preference from P7 Pro and P7 → P6a on BBY, evidenced with the growth of P6a sales; while overall Pixel traffic **declined**
- Overall Watch sales **grew WoW** across both T-Mo (>100% ↑) and AT&T (24% ↑); Opportunity to promote [WearOS update](#) (May W1)

Sales

		Pixel 7		Pixel 7 Pro	
Total		9,231		6,182	
WoW		-13%		-15%	
Sales		Wk 17			
		VZN	TMO	AT&T	BB
		5,662	3,911	3,280	2,560
		Δ 12%	Δ 1%	Δ -6%	Δ -53%
Mkt Units		As of Wk 11			
		152K	Δ 2%	1.4M	Δ -3%
Mkt Share		As of Wk 11			
		19.1%	Δ -1.4%	2.4%	Δ 0.3%

Traffic

	VZN	TMO	AT&T	BB
Total Partner Traffic	12.7M Δ 768.1K	45.7M Δ -641.9K	36.9M Δ -1.7M	21.4M Δ -196.5K
Google PDP Traffic	18.5K Δ -2.2K	12.4K Δ 1.1K	7.0K Δ -2.2K	54.2K Δ -33.7K
Google Share of Traffic	6.3% Δ -0.4%	5.8% Δ -0.0%	4.2% Δ -1.6%	23.7% Δ -11.2%

Overall Pixel sales dropped WoW. 140% growth in P6a weekly sales on BBY, 53% drop on P7 and P7 Pro. Pixel Watch sales on T-Mo grew >2x WoW

Drop in retailer level + Google PDP traffic; 8% growth in Google PDP traffic on T-Mo; Drop in BBY Pixel Desktop traffic after weeks of high SoT

Pixel placements and promotions **improves** on Verizon, but **remain low** on T-Mo and AT&T

Verizon



VZN: All 3 OEMs launch bundles (Mother's Day), Pixel **remains competitive basis promos** (P7 Pro replaced by P7 banner). Similar 5F placement as LW.

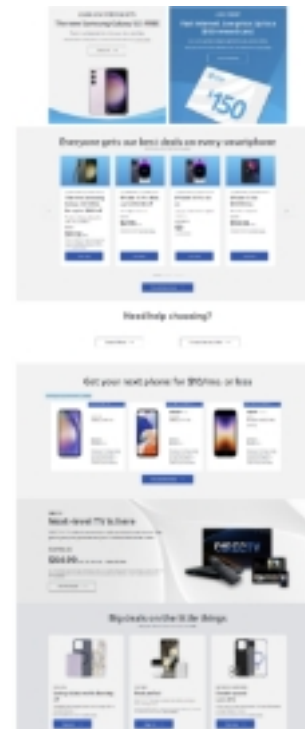
However **PDP not updated with new bundle**

T-Mobile



T-Mo: **No visibility** on homepage or deals page

AT&T



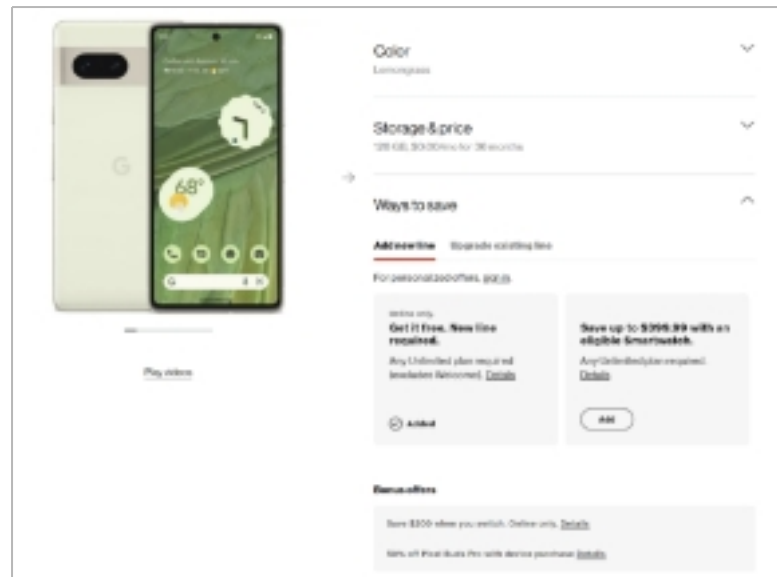
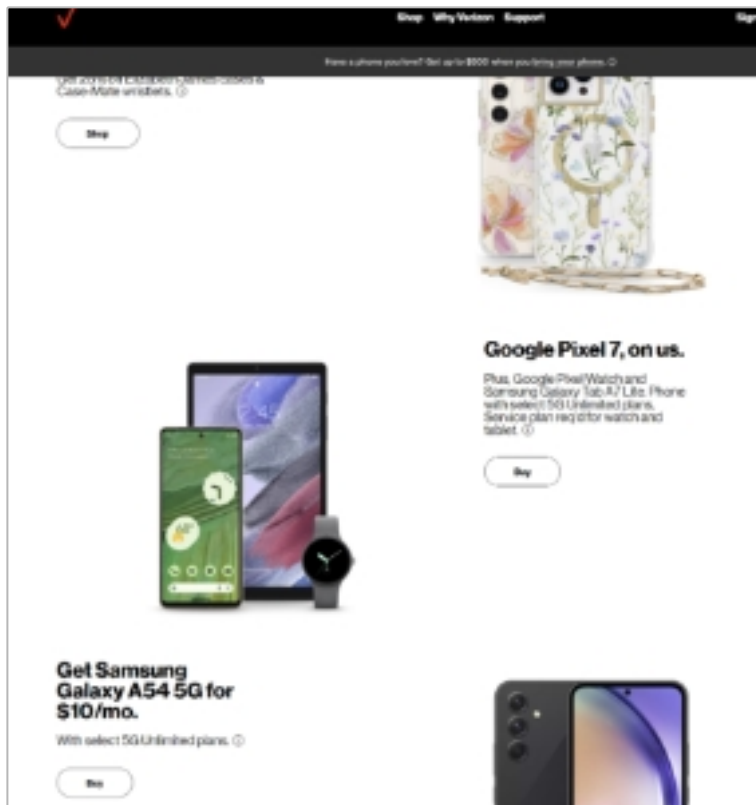
ATT: Pixel continues to have **no placements on Home page**

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

iPhone 13 promo / messaging improved
WoW from \$15/mo to \$10.9/mo

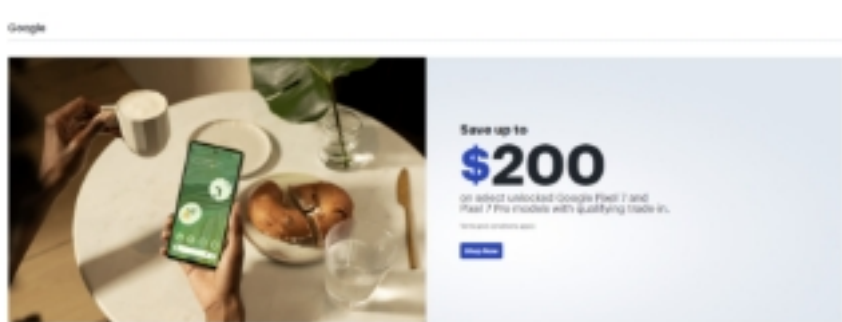
Bundle offers on Pixel devices continue on deals page, but placements at the bottom

Verizon Pixel 7 Bundle not correctly updated on the PDP

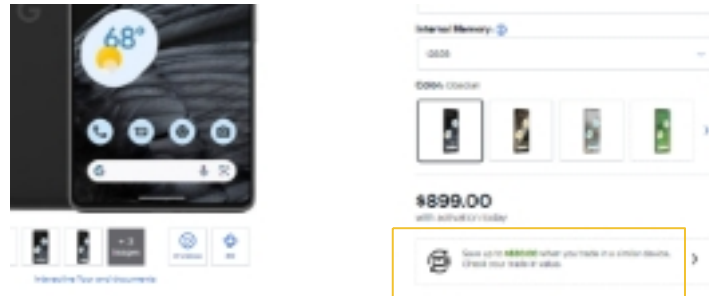
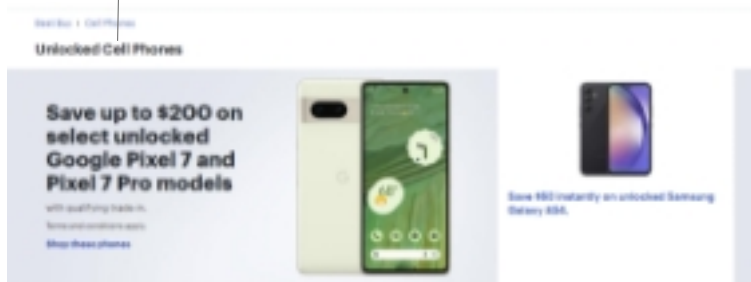


While VZN Deals & Phone Deals pages feature a new Pixel 7 bundle, the PDP still mentions a **generic watch promo (instead of Pixel Watch)** + Galaxy Tab A7 Lite promo **missing**

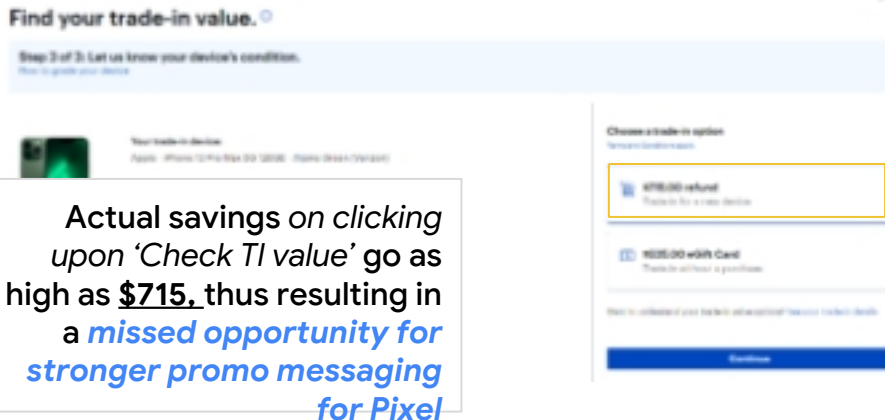
Lower Promo Value advertised than actual for Pixel on Best Buy for last 2 weeks



Both Top Deals page banner and Unlocked Cell Phones page banners highlight max TI savings of upto \$200, however..



Pixel 7 Pro Unlocked PDPs specify max TI savings of \$530

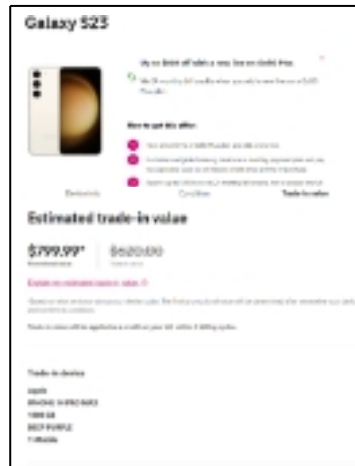
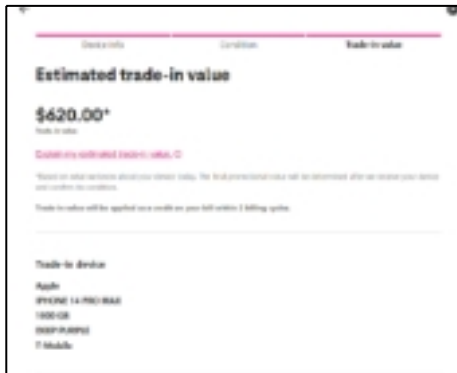


Actual savings on clicking upon 'Check TI value' go as high as \$715, thus resulting in a *missed opportunity for stronger promo messaging for Pixel*

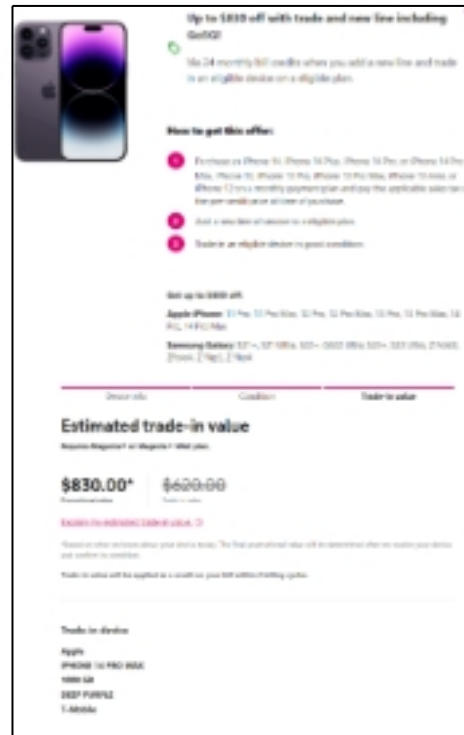
Lower Promo Value advertised than actual for Pixel on T-Mobile (competition models have accurate promo messaging)

Pixel 7 Pro TMO Deals specify Save \$500 upon trade-in

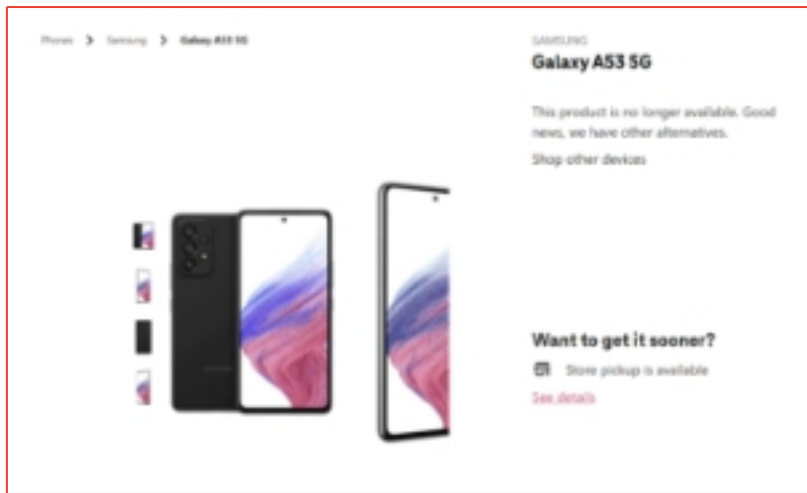
But Actual savings on clicking upon 'Check TV value' go as high as **\$620**, (select models such as i14 Pro Max) thus resulting in a **missed opportunity for stronger promo messaging for Pixel**



However this is not the case for competitor models (S23) and (i14 series) where advertised TI value is equal to actual



Competitor model gets favourable placements despite being unavailable



Samsung A53 unavailable (OOS) on the T-Mobile website, however the carrier-partner still has a carousel placement on the bottom of the deals page (Desktop)

