



Weekly 3P Digital Overview

Pixel sales across carriers dipped, with a a similar decline in traffic. Pixel’s share of BP showed a slight improvement on all carriers except VZN, however Samsung continued to gain on homepage placements. Falling S23 promos reducing promo gaps for Pixel

Sales

Pixel 7		Pixel 7 Pro	
Total WoW	9,485	10,237	
Sales	Δ-2%	Δ-9%	
VoW	1,729	4,301	3,995
	Δ-1%	Δ-24%	Δ-0%
	2,695	3,697	
	Δ-0%	Δ-23%	
TAM	106K	Δ-20%	1.3M
	Δ-20%	Δ-8%	
Mkt Share	15.3%	Δ 3.4%	2.5%
	Δ 3.4%	Δ-0.2%	

Traffic

	VZN	TMO	AT&T	BB
Total Partner Traffic	13.4M	48.4M	41.7M	22.4M
	Δ 1.7%	Δ 93.9%	Δ 2.0%	Δ -2.2%
Google PDP Traffic	29.6K	16.9K	10.9K	43.0K
	Δ -1.3%	Δ -2.9%	Δ 2.5%	Δ -30.4%
Google Share of Traffic	8.7%	7.0%	5.2%	19.4%
	Δ -0.1%	Δ -0.9%	Δ 0.7%	Δ -11.3%

Placements/Prominence

	VZN	TMO	AT&T	BB
Android vs. Apple	12 / 7	14 / 18	14 / 0	26 / 3
Google vs. Samsung	0 / 12	0 / 14	0 / 1	0 / 26
Google Share of Prominence	8%	3%	3%	14%
	Δ -1.0%	Δ 0.8%	Δ 0.0%	Δ 1.7%

Availability

% of cases where P7 / Pro shipment times are less than 2 days

VZN	TMO	AT&T	BB
100%	100%	100%	91%

Availability details by model / variant / carrier

P7+Pro sales ↓ WoW, stronger fall on P7.

Fall led by BBY (both P7/Pro) and T-Mo (P7);

the former's sales aligned with WoW fall in

MM

Overall traffic (desktop + mob) ↓ across carriers,

however Google DSKTP visits ↑ slightly on AT&T, ↓

significantly on BBY, slightly on VZN, T-Mo

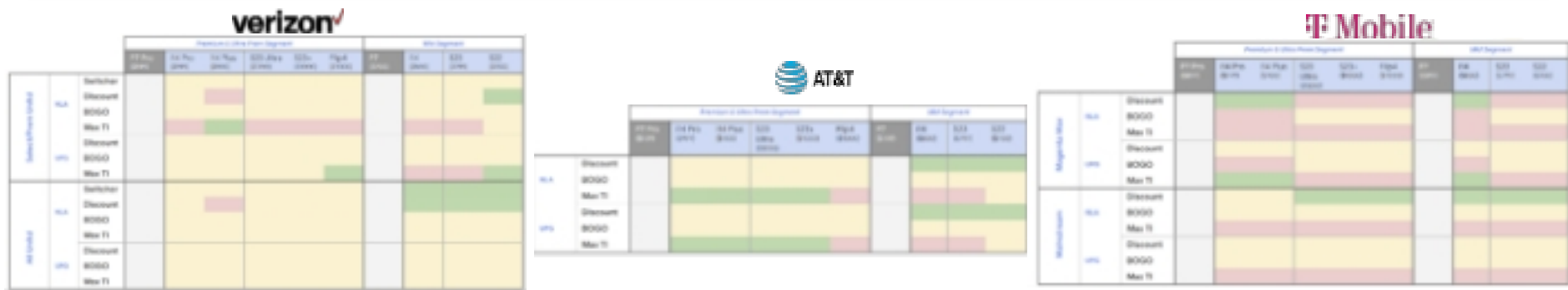
S23 home page prominence grew on VZN,

while Pixel placements & SoBP ↑ slightly on T-

Mo and BBY;

- [REDACTED]
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Pixel Promotional Gaps Snapshot



Carriers with key WoW Δ

	verizon	AT&T	T-Mobile	BBY Carriers+Unlckd	Other carriers
P7 Pro	Bundle offer ↑ to \$400 on smartwatch			TI X, Uniq disc ↓ \$150-\$250 on Unlocked	-
P6 Pro	Bundle offer ↑ to \$400 on smartwatch			-	-
i14 Pro/Max	Bundle offer ↑ to \$300 on watch SE 2022			-	
S23+/Ultra	Max TI ↑ to \$1000	↓ in Max TI value to \$800	↓ in Max TI value to \$800	BBY-TMO ↓ in Max TI value to \$800	Unlisted from AMZ
Flip/Fold4	TI X for UPG		↓ in Max TI value to \$800		
S22 Ultra/+	-		↓ in Max TI value to \$800		-
P7	Bundle offer ↑ to \$400 on smartwatch				-
i13	Uniq disc ↓ to \$520 from \$700			-	-

Models with key WoW Δ

Multiple changes on S23 promotions across carriers

- **Strengthening** of premium S23 Ultra/+ on VZN,
- **Drop** in TI T-Mo, BBY T-Mo & AT&T

verizon

S23+/Ultra Max TI ↑ to \$1000

Strengthening of bundle offers: ↑ in value for iPad and watch for iPhones. For Pixel ↑ in value of Smart watch by 81%

AT&T

TI values ↓ for all SS models (Magenta Max),

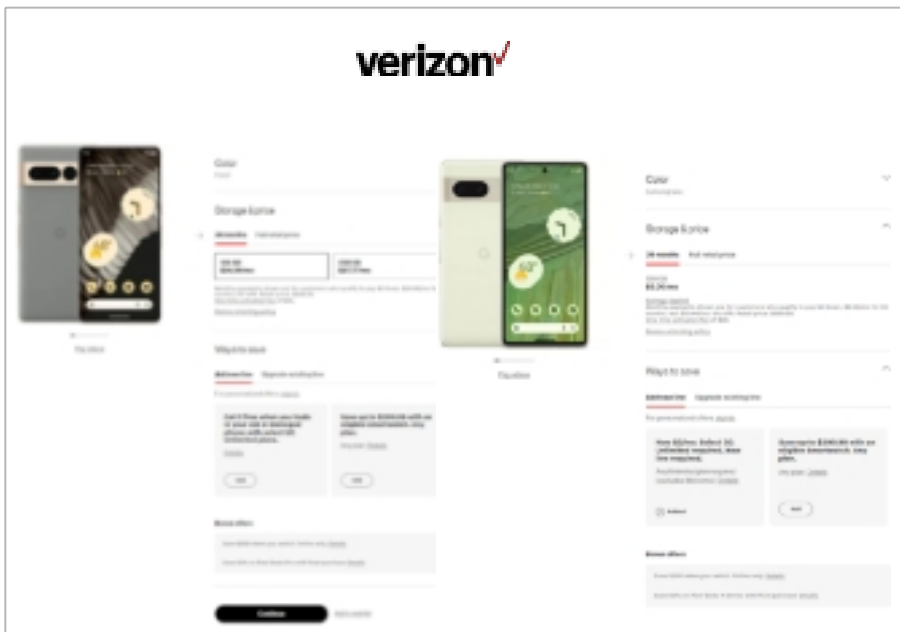
↓ S23+/Ultra Max TI to \$800 (Eligible Unltd)

BBY

Fall in Max TI value for S23 series from \$1000 to \$800 (BBY T-Mo)

S23 series taken off Amazon briefly

		Pixel <input type="checkbox"/> Apple <input type="checkbox"/> Samsung <input type="checkbox"/> Non-branded banners <input type="checkbox"/>		
Partner	Pixel 7/7 Pro offer	Home Page	Deal Page	Category Page
US	Verizon Get Google Pixel 7 Pro on us with select trade-in and select 5G plans. Online Only. Plus \$200 when you switch <i>(Deals page)</i> (\$200 Switch +Upto \$900 NLA TI / \$800 Upg TI)	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
	Get Pixel 7 for \$5/mo <i>(Listings Page)</i> (\$200 Switch + \$520 Discount + Upto \$700 Upg TI)			
	AT&T Get the Google Pixel 7 Pro free with T/I <i>(Listings page)</i> (Guaranteed TI \$939)	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
	P7 at \$10/mo, no trade-in required <i>(Listing Page)</i> (\$300 Discount + Upto \$380 AT&T Promotional cards on TI)			
	T-Mobile Save upto \$600 on the P7 Pro <i>(Deals Page)</i> (\$500 Discount + Upto \$600 TI)	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
Get the Pixel 7 for FREE <i>(Deals Page)</i> (\$500 Discount + Upto \$600 TI)				
Best Buy Save \$100 on storage upgrade on select P7 & P7 Pro cell phones (Unlocked) <i>(Top Deals > Cell Phones page)</i> P7 Pro: \$150 Unique Discount (\$749 Activate Today / \$899 Activate Later) P7: \$100 Unique Discount (\$499 Activate Today / \$599 Activate Later)	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	
Amazon P7 Pro: \$31 off on listing price, P7: \$45 off on listing price	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	

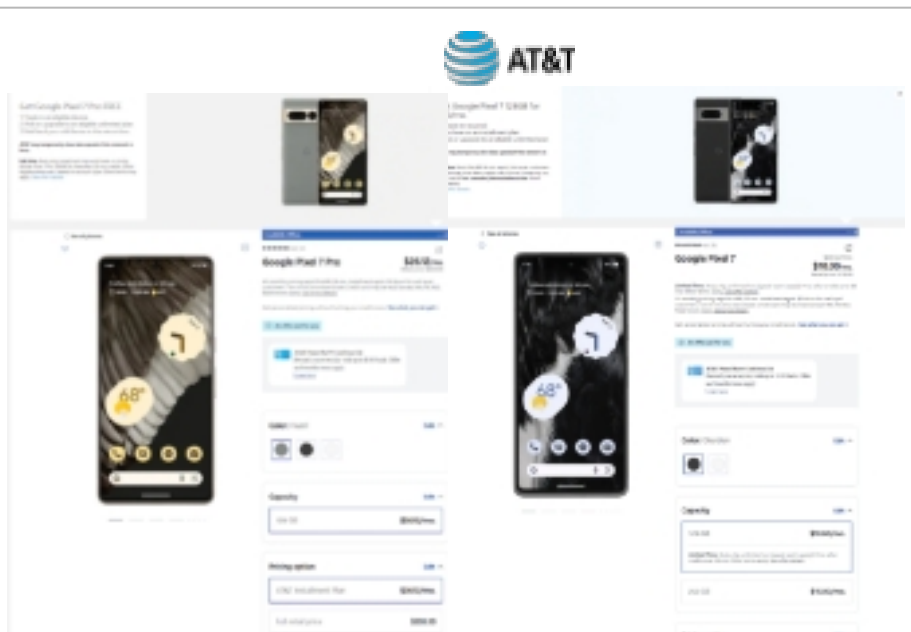


P7 Pro

\$200 NL Switch (Both Plans) +
Upto \$900 NLA TI + Upto \$800
UPG TI (Select Unltd Plans only)

P7

\$200 NL Switch (New Line) +
\$520 Unique Discount NLA (Both
Plans) + Upto \$700 UPG TI
(Select Unltd) [UPG Free but not
highlighted on carrier pages]



P7 Pro

Guaranteed \$939 NLA & UPG TI
(marketed as FREE)

P7

\$380-\$300 Unique Discount
(starting at \$10/mo)









P7 Pro


MM: Upto \$600 off on TI
Mainstream: Upto \$300 off on TI
Both: \$501 NLA Unique Discount

P7

MM: Upto \$600 off on TI
Mainstream: Upto \$300 off on TI
Both: \$500 NLA Unique Discount


Unlocked





P7 Pro

\$150 Unique Discount (\$749
Activate Today / \$899 Activate
Later)

P7

\$100 Unique Discount (\$499
Activate Today / \$599 Activate
Later)

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	-	-	720	-	-	-	520	-	-	340
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	900	1000	0	1000	1000	1000	0	800	800	-
	UPG	Discount	-	-	-	-	-	-	-	-	-	-
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	800	800	800	800	800	0	700	800	800	0
All Unltd	NLA	Switcher	200	200	200	200	200	200	200	200	200	200
		Discount	-	-	720	-	-	-	520	-	-	340
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	-	-	-	-	-	-	-	-	-	-
	UPG	Discount	-	-	-	-	-	-	-	-	-	-
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	-	-	-	-	-	-	-	-	-	-

- S23+, S23 Ultra Max Tis increased to 1000 from 800 on VZN (Select/Prem Unltd).
- Flip4 UPG Max Trade In Decreased to 0 from 440 on VZN (Select/Prem Unltd).

Pixel at disadvantage Pixel at advantage Pixel on par

			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

- S23 Ultra and S23+ dropped to 800 from 1000 on AT&T (Eligible Unltd)

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 (\$599)	i14 (\$800)	S23 (\$799)	S22 (\$700)
Magenta Max	NLA	Discount	501	-	-	800	800	800	500	-	800	800
		BOGO	-	350	350	-	-	-	-	350	-	-
		Max TI	600	1000	1000	800	800	800	600	1000	800	800
	UPG	Discount	-	-	-	-	-	-	-	-	-	-
		BOGO	-	350	350	-	-	-	-	350	-	-
		Max TI	600	400	400	800	800	800	600	400	800	800
Mainstream	NLA	Discount	500	-	-	400	400	400	500	-	400	400
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	300	800	1000	400	400	400	300	1000	400	400
	UPG	Discount	-	-	-	-	-	-	-	-	-	-
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	300	400	400	400	400	400	300	400	400	400

- Flip 4, S22 and S23 Series Max TI reduced by \$200 (800 from 1000 on T-Mobile (Magenta Max)).
- Flip 4, S22 and S23 Series Max TIs reduced to 400 from 500 on T-Mobile (Mainstream).

Highlights

Fall in both Samsung marketing messages and promotions across carriers - including AT&T, T-Mo, BBY and SS.com 1P > Except VZN, where S23 bundle offers were promoted (until 7 Mar)

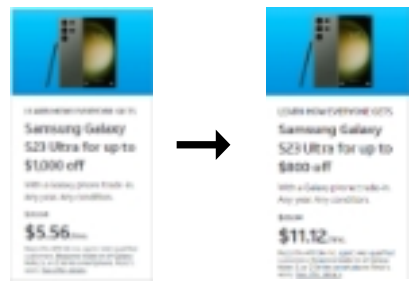
Apple placements see growth on both VZN and T-Mo last week, continued growth in current week owing to i14 series 'Yellow' colour launch (treated as NPI across partners)



- Only P7 features beyond 3F on Phone Deals page, with no further mentions for P7 Pro (which is FREE) or P6a
- **Steep decline in Pixel BP** (10% on Jan 23 to **>1% on Mar 6**) on Desktop and Android - Strong recommendation to improve placements

- Hero Device: S23 for FREE, across home and deals page

Offer on premium products like S23 Ultra reduced (from \$1000 to \$800 now)



- Deals page (highest traffic landing page) highlights iPhones across price segments
- Banner represents Apple and SS as the only two smartphone OEMs, **no Pixel mention**



- P7 Pro banner **climbs up by 1 fold** on the deals page to F2, however T1 only available for Select Premium customers
- Opportunity to promote bundled products like S23 & i14 Pro

- Hero Device: S23+ across landing pages, with bundle of \$1000 highlighted (until 7 Mar), i14 Pro 8 Mar onwards



- Mid-week shift from S23+ and S23 bundle on homepage to i14 Plus (Yellow) launch



Marketing messaging reverted to 'Save up to \$600 (P7 Pro) and 'FREE' (P7) thereby **improving marketing strength**. Stronger bundle push

- Hero Device: i14 Pro with strong placements of S23+ just below it
- **T/I's for Flip 4, S22 and S23 Series Max Ti reduced to 800 from 1000**, but marketing messages remain same.
- Pixel's bundle (phone + watch) on Deals page, highlights 'Fast Pair' amongst Android devices. Followed by 2F worth of Apple Watch placements
- New iPhone 14 Pro ON US overtakes Samsung to be on the top spot for the deals page

