



US Digital WBR Report

December Analysis - WK 50

[Link](#) to WBR Master Folder (with all past decks)

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

[go/pixeloffers-WBR](https://go.pixeloffers-WBR) (all historical decks)

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Symphony Resources

AMER Promo Offers:
[go/pixeloffers](https://go.pixeloffers)

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

US Traffic Dashboards:
[go/pixelonlineus](https://go.pixelonlineus)

US Promo Trackers:
[go/pixelpromotracker](https://go.pixelpromotracker)

US Exec Dashboard:
[go/pixelperformance](https://go.pixelperformance)

Historical Digital WBRs

2023

March

W1 |
6 Mar

W2 |
13 Mar

W3 |
20 Mar

W4 |
27
Mar

April

W1 |
3 Apr

W2 |
10 Apr

W3 |
17 Apr

W4 |
24
Apr

May

W1 |
1 May

W2 |
8 May

W3 |
15
May

W4 |
22 May

W5 |
29
May

Jun

W1 |
05 Jun

W2 |
12 Jun

W3 |
19 Jun

W4 |
26 Jun

July

W1 |
03
July

W2 |
10 July

W3 |
17 July

W4 |
24
July

W5 |
31 July

2023

August

W1 |
07
Aug

W2 |
14 Aug

W3 |
21 Aug

W4 |
28 Aug

September

W1 |
04 Sep

W2 |
11 Sep

W3 |
18 Sep

W4 |
26 Sep

October

W1 |
03 Oct

W2 |
09 Oct

W3 |
16 Oct

W4 |
23 Oct

W5 |
30 Oct

November

W1 |
06
Nov

W2 |
09
Nov

W3 |
20
Nov

W3 |
27 Nov

December

W1 |
04
Dec

W2 |
11 Dec

KPI deep dive

(Competitive Views, Brand Prominence, Traffic & Market Share)

WK 49: Dec 03- Dec 09

Sales Drivers

- Overall, **Google PDP traffic grew significantly on TMO(↑30%) and AT&T(↑126%)** which resulted in **corresponding rise in Google SoT**. However, despite growth in Pixel traffic **sales remained relatively low across all Partners**.
- On AT&T, **Pixel registered strong demand uplift** owing to the introduction of Bundle Offer (Free Pixel Watch 2-\$400) with P8 series. **T-Mo also saw demand uplift for P. Fold** driven by the introduction of \$400 Trade-In offer

Total	Pixel 7a	Pixel 8	Pixel 8 Pro	Pixel Fold
WoW	4,067	7,949	11,003	7%
Sales	-37%	-13%	-15%	4%
Wk 49	VZ	TMO	AT&T	BBY
	7,726	7,649	3,660	4,790
	Δ-24%	Δ-14%	Δ-16.0%	Δ-79%
Mkt Units	Pixel 8		Pixel 8 Pro	
As of Wk 47	190K Δ 43%		1.3M Δ 46%	
Mkt Share	12.9% Δ 5.6%		4.8% Δ 1.0%	
As of Wk 47				

Sales



Total Partner Traffic

Google PDP Traffic

Google Share of Traffic

VZ	TMO	AT&T	BBY
12.5M Δ -8.5%	46.5M Δ 1.3%	40.1M Δ -4.5%	26.5M Δ -28.5%
52.8K Δ -32.7%	112.1K Δ 29.5%	68.4K Δ 125.6%	83.8K Δ -2.5%
5.2% Δ -0.4%	12.0% Δ 1.9%	12.4% Δ 8.8%	23.4% Δ 9.6%

Traffic

Sales data taken from [go/hwp-tableau](https://www.google.com/hwp-tableau) refreshed in case of updates through the week

Overall, Pixel **sales declined significantly** across all partners.

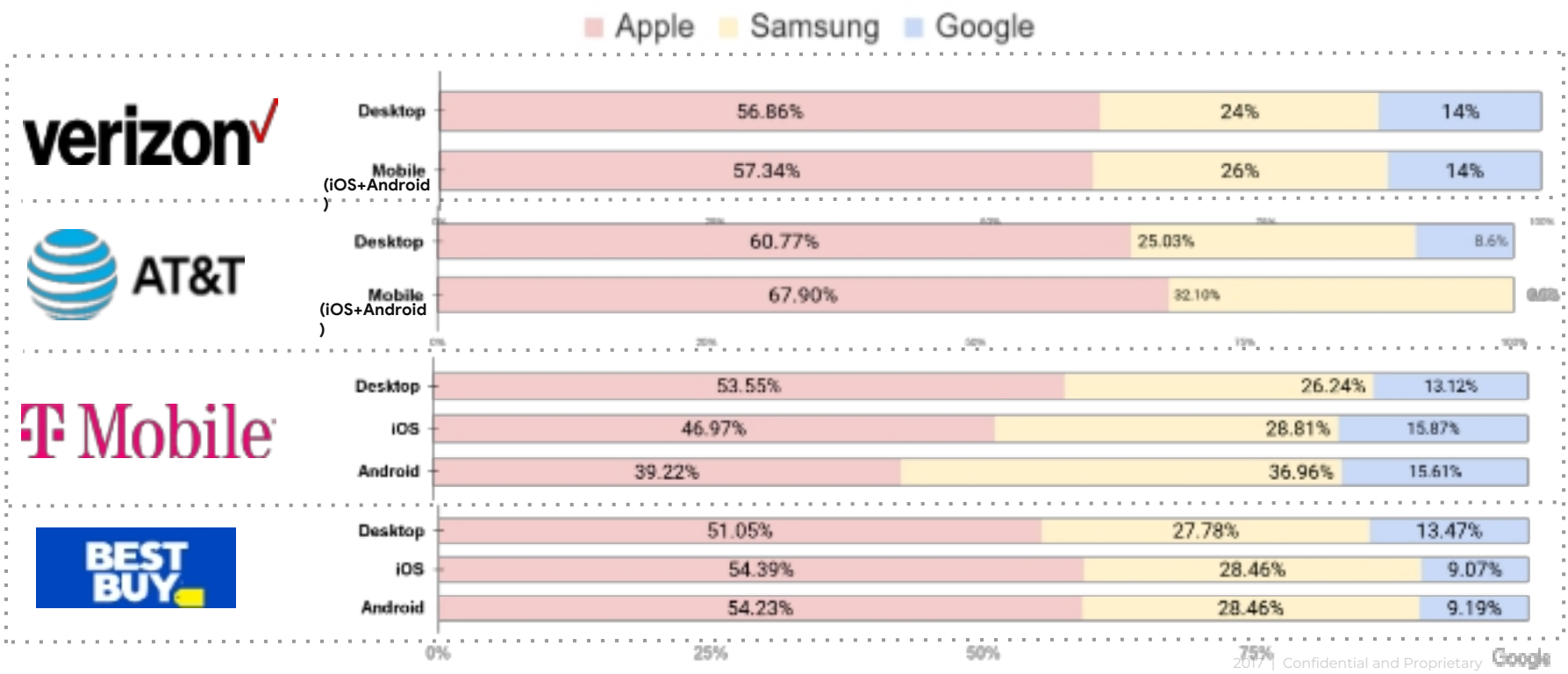
Total Partner Traffic dipped across all partners except T-Mo

Google SoT witnessed growth across partners esp. on BBY and AT&T

Brand Prominence/ Placements Across Partners (Wk 49: 3 Dec -9 Dec)

Tracking basis device / OS of viewer: Desktop, iOS and Android

Apple visibility drops across VZ Desktop as S23 Series take prominent position across Verizon Shop, Deals and Phone Deals page.



US - Site Total Traffic Wk49 (Dec 03 - Dec 09)



Carrier by OEM level insights:

- YoY Website traffic grew on AT&T(↑17%), T-Mo(↑4%) and VZ(↑11%) while BBY(↓8%) saw YoY dip
- WoW traffic for Pixel saw a significant growth on AT&T(↑125%), T-Mo(↑30%)
- Overall, YoY traffic grew across all three OEMs with Pixel experiencing most significant surge (↑27%)
- Pixel witnessed strong YoY growth on T-Mo(↑169%) and BBY(↑21%) while YoY demand dipped on AT&T(↓40%) and VZ(↓27%)

Model level insights (WoW Insights):

- Overall, P8 and P8P registered significant growth across all carriers except Verizon.
- On BBY, P8 series witnessed strong growth, while SS and Apple experienced sharp drop in demand(>40% dip across most products).
- Overall, i15 series and i14 series traffic dipped across all partners esp. BBY and AT&T saw the highest dips.

Category	TOTAL			BEST BUY			AT&T			T - MOBILE			VERIZON		
	This Week	WoW	YoY	This Week	WoW	YoY	This Week	WoW	YoY	This Week	WoW	YoY	This Week	WoW	YoY
Website	125,562,951	-13,036,576 ↓	5.4% ↑	26,541,152	-10,579,4...	-8.3% ↓	40,053,756	-1,888,8...	16.5% ↑	46,463,556	600,476 ↑	4.2% ↑	12,504,487	-1,168,716 ↓	10.9% ↑
Pixel	317,113	12.7% ↑	26.7% ↑	83,785	-2.5% ↓	20.8% ↑	68,383	125.6% ↑	-40.4% ↓	112,139.91	29.5% ↑	168.7% ↑	52,806	-32.7% ↓	-26.7% ↓
Samsung	1,048,815	-19.6% ↓	7.0% ↑	163,074	-51.3% ↓	-45.7% ↓	212,023	-38.7% ↓	-19.8% ↓	378,629.63	27.5% ↑	36.0% ↑	295,088	-10.0% ↓	40.0% ↑
iPhone	1,446,729	-29.4% ↓	9.7% ↑	84,820	-51.0% ↓	-57.7% ↓	269,514	-39.5% ↓	-52.7% ↓	418,826.38	-3.6% ↓	20.6% ↑	673,568	-32.4% ↓	38.9% ↑
WoW			YoY	WoW			YoY			WoW			WoW		

[Source: SimilarWeb]

Weekly Digital Promo Audit

(Competitive Insights, Promo Changes)

Updated by Mon, Friday (US time zone)

US December Comparison: Pixel 8/Pro vs iPhone vs S23

128 GB	Plan Eligibility		Pixel 8 \$699 Sub6, \$799	Pixel 8 Pro \$999	Max Advertised Value (w/TI)	iPhone 15 \$799 (1P), \$830(3P)	iPhone 15 Pro \$999	Max Advertised Value (w/TI)	Galaxy S23 \$799	Galaxy S23+ \$999 (256GB)	Max Advertised Value (w/TI)
Gstore	Unlocked		Save \$150 Free w/Trade-In	Save \$200 ≤\$750 off w/TI	▢ \$950	≤\$650 off w/TI		\$650	≤\$600 ≤\$525 off w/TI		\$525
BBY					N/A		NA	≤\$100 IR ≤\$125 IR	\$125 IR	\$125	
AMZ			Save \$150	Save \$200							▢ \$200
Fi			UPG: \$700 No TI NLA: \$700 Back w/ TI					▲ \$700	\$500 back No TI		\$500
VZ (36 mos)	NLA	Phone+Bundle (ARPU)	FREE “On Us” + Free Watch 2 (N) BOGO \$400 Introduced		► \$1.4K	FREE “On Us” + Free iPad (N-1) + Watch (N) PWP Watch (N) + iPad (N-1)		\$1.7K	FREE “On Us” + GWP Tab S9 FE (N) + \$350 Watch 6 (N) BOGO \$400 Introduced		\$1.8K
		Unlimited Ultimate	Free w/TI. Guaranteed. Any Google model, Any condition	Free w/TI. Guaranteed. Any Google model, Any condition ≤\$800 off w/TI	►\$1K	Free w/TI. Guaranteed. Any Apple model, Any condition		\$1K	Free w/TI. Guaranteed. Any Samsung model, Any condition	Free w/TI. Guaranteed. Any Samsung model, Any condition ≤\$800 off w/TI	\$1K
		Unlimited Plus				Free w/ TI	≤\$830 off w/ TI				
		Unlimited Welcome				≤\$400 off w/TI		►\$400			
	UPG	Unlimited Ultimate Plus, Welcome	Free (No TI)	\$10/mo (No TI)	►\$800	≤\$830 off w/TI		\$830	≤\$800 off w/TI		\$800
			≤\$800 off w/TI	≤\$800 off w/TI							
TMO (12~24 ² mos)	NLA	Phone+Bundle (BOGO)	No offer		▼ \$0	“Get 4 iPhone 15 On Us and 4 lines for \$25/line”		+4 lines: \$3.5K	No offer		\$0
		Go5G Next ¹	FREE “On Us” (No TI)		▲ \$1K (No TI)	Free “On Us” No TI TI	\$830 (No TI)	\$830	≤\$800 off (No TI)		\$800
		Go5G Plus ²				≤\$830 off w/ TI		\$830			
		~5G plans (MM, Go5G, Magenta)	\$700 off (No TI)		▲ \$700				\$600 off (No TI)		\$600
		All Plans	No offer		▼ \$0	BOGO (get ≤\$700 off second line) (iP13-15 series, all plans)		\$350	≤\$200 off w/TI		\$20
	UPG	Go5G Next ¹	Free “On Us” w/TI		▲ \$1K	Free “On Us” w/TI		\$1K	\$800 off w/TI		\$800
		Go5G Plus ²				≤\$830 off w/ TI		\$830			
		~5G plans (MM, Go5G, Magenta)				≤\$500 off w/TI [*CRM only: \$700 offw/TI]		▲ \$500			
AT&T (36 mos)	NLA / UPG	Premium Plans	\$10/mo (No TI) + Pixel Watch 2 Free	Free w/ TI + Watch 2 Free	▲\$1.4k	Free “ON US” w/TI (min TIV \$130)	Free “ON US” w/TI (Min TIV \$230)	\$1K	≤\$800 off (No TI) + Galaxy Watch 6 Free	≤\$1K off (No TI) + Galaxy Watch 6 Free	\$1.3K (Min TIV \$95)

As of 12/6

Evaluation Warning: The document was created with Spire Presentation for Python

December Promo Comparison: P8/Pro vs iP15/Pro vs S23/S23+

New = Contingency Offers, VZ in review, AT&T starts 12/8

128 GB	Plan Eligibility		Pixel 8	Pixel 8 Pro	Max Value w/TI	iPhone 15	iPhone 15 Pro	Max Value w/TI	Galaxy S23	Galaxy S23+ (256 GB)	Max Value w/TI
Gstore	Unlocked		Save \$150 Free w/ Trade-In	Save \$200 <\$750 off w/TI	□ \$950	<\$650 off w/TI \$200 - \$650 (iP11 or higher)		\$650	<\$600 off w/TI		\$600
BBY			Save \$150	Save \$200	□ \$200	N/A		NA	\$100 IR	\$200 IR	\$100
AMZ			UPG: \$700 No TI NLA: \$700 Back w/ TI		▲ \$700	iPhone 14: <\$350w/TI		NA	\$500 back No TI		\$500
Fi											
VZ (36 mos)	NLA	Phone+ (ARPU)	FREE "On Us" + Free Watch 2 (N) BOGO \$400		► \$1.4K	FREE "On Us" + iPad (N-1) + Watch (N)		\$1.7K	FREE "On Us" + GWP Tab S9 FE (N) + \$350 Galaxy Watch 6 (N) BOGO \$400		\$1.8K
		Unlimited Ultimate	Free w/TI. Guaranteed.		► \$1K	Free w/TI. Guaranteed.		\$1K	Free w/TI. Guaranteed.		\$1K
		Unlimited Plus, Unlimited Welcome	Free w/ TI			Free w/ TI			Free w/ TI		
	UPG	~Unlimited Plans (Ultimate, Plus, Welcome)	Free w/TI Free w. Ultimate/ \$5mo w.Plus No TI CRM: Free all plans	<\$800 off w/TI \$10mo w.Ultimate /\$15mo w.Plus No TI CRM: \$10mo all plans	▲ \$800	<\$830 off w/TI		\$830	<\$800 off w/TI		\$800
TMO (12'-24' mos)	NLA	Phone+ (BOGO)	No offer		▼ \$0	"Get 4 iPhone 15 On Us and 4 lines for \$25/line"		+4 lines: \$3.5K	No offer		\$0
		Go5G Next ¹	FREE "On Us" (No TI)		▲ \$1K	Free "On Us" w/TI		\$1K	<\$800 off (No TI)		\$800
		Go5G Plus ²									
		~5G plans (MMax, Go5G, Magenta)	\$400 off (No TI) \$700 off (No TI)		▲ \$700	<\$830 off w/ TI		\$830	\$600 off (No TI)		\$600
		All Plans	No offer		▼ \$0	BOGO (get <\$700 off second line) (iP13-15 series, all plans)		\$350	No offer		\$0
	UPG	Watch Offer	Watch 2 50% w/NLA		▼ \$200	Watch 9 BOGO or \$200 off w/NLA		\$329	Free Watch 6 w/NLA		\$349
		Go5G Next ¹	Free "On Us" w/TI		▲ \$1K	Free "On Us" w/TI		\$1K	\$800 off w/TI		\$800
		Go5G Plus ²				<\$830 off w/ TI		\$830			
AT&T (36 mos)	NLA / UPG	Premium Plans	\$10/mo (No TI)	\$15/mo (No TI) Free w/TI (\$35+)	▲ \$1040	Free w/TI (\$130+)	Free w/TI (\$230+)	\$1K	<\$800 off w/TI (\$35+)	<\$1K off w/TI (\$95+)	\$1K
	NLA	Watch Offer	Watch 2 Free w/ P8/Pro		c\$399	Watch 9 BOGO		\$500 - \$300	Watch 6 Free w/S23/+		\$349

▼ Pixel Disadvantage

▲ Pixel Advantage

► Pixel Close In Variance

Partner-led Headline Offer