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

US Traffic Dashboards:

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

US Promo Trackers:

go/pixelpromotracker

US Exec Dashboard:

go/pixelperformance

Historical Digital WBRs

2023

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

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

2023

July

W1 |
03
July

W2 |
10 July

W3 |
17 July

W4 |
24
July

W5 |
31 July

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

Execution Updates			
Call out	Detail	First Reported on	Action Owner
VZ: GWP Watch Offer not highlighting “Pixel Watch 2” on PDPs rather mentions a generic smartwatch	No mention of Pixel Watch2 on VZ PDP or checkout. Resolved as Pixel PDP mentions Pixel Watch2. Galaxy Watch6 bundle taken off and Watch2 is hero watch promo on Android and upon checkout.	4 Oct	VZ: Dallas (CSA), Justyna (PM) [Resolved]
TMO PDPs not mentioning GwP promos due to online capabilities	Low awareness of GwP promo on TMO due to limited digital visibility post announce. Resolved: TMO highlights Pixel Watch2 GwP on top fold of Pixel 8 / Pro PDPs (Ref)	4 Oct	TMO: Gary (CSA), Brittany (PM) [Resolved]

Sales Drivers

- **Google PDP Traffic experienced substantial surge, contributing SoT bump.** However, sales declined across all partners, with the most significant drop occurring on T-Mo, AT&T, and VZN.
- The i15 series traffic dipped for 2nd consecutive week however, The Ultra Premium Segment continues to drive higher demand than the Mid Segment.

Sales

Total	Pixel 7a	Pixel 7	Pixel 7 Pro	Pixel Fold
WoW	5,055	3,228	1,476	784
Sales	-11%	-38%	-39%	-69%
Wk 40	VZN	TMO	AT&T	BB
	4,019	2,214	2,608	1,702
	Δ -27%	Δ -53%	Δ -31.4%	Δ -9%
Mkt Units	Pixel 7		Pixel 7 Pro	
As of Wk 38	110K Δ -8%		2.2M Δ 142%	
Mkt Share	Pixel 7		Pixel 7 Pro	
As of Wk 38	18.9% Δ -1.6%		1.3% Δ -1.8%	



Traffic

Total Partner Traffic

VZN	TMO	AT&T	BB
15.3M	50.5M	43.6M	21.6M
Δ -2.3%	Δ -3.0%	Δ -4.5%	Δ 5.1%
Google PDP Traffic			
80.1K	62.7K	27.1K	195.2K
Δ 394.4%	Δ 364.4%	Δ 165.7%	Δ 647.9%
Google Share of Traffic			
14.4%	14.3%	7.6%	42.9%
Δ 12.1%	Δ 11.7%	Δ 5.2%	Δ 35.4%

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

Overall, Pixel sales dipped across all Partners, esp Pixel Fold on T-Mo down from **1.7K → 108 units**

Google PDP traffic grew exponentially driven by Pixel 8 Launch, leading to share of traffic growth across partners

Promo Competitiveness

LIVE (DAILY) DURING LAUNCH WEEK

US Launch Offer Comparison: Pixel 8 Pro | iPhone 15 Pro | S23+

TLDR: ATT & Unlocked competitive, VZ continues iP15 Pro GTI, TMo seeing OOS on iP15 Pro turned on BOGO, boosted UPG to Free on base models

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	Max Advertised Value (w/TI)	
Gstore	Unlocked		<\$650 off w/TI + Free Buds / \$200 Watch	<\$750 off w/TI + Free Watch 2	🟩 \$1.1K	<\$650 off w/TI		\$650	<\$615 off w/TI + PWP \$360	<\$615 off w/TI + PWP \$475 + Free Mem Upgrade \$120	\$1.1K	
Best Buy			<\$670 off w/TI + Free Buds Pro	<\$800 off w/TI + Free Watch 2	🟩 \$1.15K	N/A		NA	\$150 GC <\$500 off w/TI		\$500	
Amazon			Free Buds Pro	Free Watch 2	🟩 \$350	NA		NA	\$150 - \$200 IR PWP \$40 Buds 2 Pro		\$140	
Verizon (36 mos)	NLA	Ultimate	Free <\$800 off w/TI Select models	Free <\$1000 off w/TI Select models	🟩 \$1K	Free w/TI	FREE “ON US” w/TI Guaranteed all models	\$1K	Free w/TI	Free \$1000 off w/TI Select models	\$1K	
		Plus	Free w/TI	<\$800 off w/T Tiers \$800/\$400	🟨 \$800	Free w/TI	<\$830 off w/TI All \$800 tiers	\$830	Free w/TI	Free w/TI	\$1K	
	UPG	Ultimate Plus	Free w/TI	<\$800 off w/TI	🟩 \$800	Free w/TI	<\$830 off w/TI	\$830	Free w/TI	\$800 off w/TI	\$800	
	NLA Phone+Bundle ARPU		+ GWP Free Watch 2 (N) Galaxy Watch+Tab S9 FE advertised			🟨 \$1.4K	+ PWP Watch SE/8/Ultra + iPad (N)		\$1.4K	GWP Tab S9 FE (N) + PWP \$170 Galaxy Watch(N) *Pixel advertised		\$1.7K
	NLA Switcher GC		+ Switch to VZ get \$200 Gift Card									
T-Mobile (12!- 24 mos ²)	NLA	Go5G Next ¹	<\$800 off No TI			🟨 \$800	Free w/TI	FREE “ON US” w/TI	\$1K	<\$800 off No TI	\$800	
		Go5G Plus ² ~5G plans						<\$830 w/ TI	\$830			
		-- Magenta Max	\$400 off No TI			🟨 \$400	Free w/TI	\$650 <\$830 w/ TI	\$830	\$600 off no TI	\$830	
		-- Go5G										
		-- Magenta										
		-- Essentials	<\$230 off w/ TI			🟩 \$230	<\$200 w/ TI		\$200	<\$200 w/ TI		\$200
			BOGO \$350 (all plans eligible)									
	UPG	Go5G Next	<\$800 off w/TI All \$800/\$400 tiers			🟨 \$800	Free w/TI	FREE “ON US” w/TI	\$1K	<\$800 off w/TI	\$800	
		Go5G Plus				🟩 \$800		<\$830 w/TI Select \$800/\$400 tiers				\$830
		~5G plans	<\$500 off w/ TI (Magenta Max not advertised)			🟩 \$500	<\$350 w/ TI (Magenta Max not advertised)		\$350	<\$350 w/ TI (Magenta Max not advertised)		\$350
		-- Magenta Max										
		-- Go5G										
		-- Magenta										
-- Essentials	<\$230 off w/ TI			🟩 \$230	<\$200 w/ TI		\$200	<\$200 w/ TI		\$200		
NLA Phone+Bundle ARPU		+ GWP Free Watch 2 [Phone purchase required]			🟩 \$1.2K	Free Watch SE (N2) [No phone purchase qualifier]		\$1.3K	+ Free Watch 6 (N) [No phone purchase qualifier]		\$1.1K	
AT&T (36 mos)	NLA / UPG	Premium Plans	\$15/mo No TI (min TIV \$35)	Free (\$1040 off) w/TI (min TIV \$35)	🟩 \$1K	Free w/TI (min TIV \$130)	Free “ON US” w/TI (min TIV \$230)	\$1K	FREE w/TI (min TIV \$35)	\$1000 off w/TI (min TIV \$35 \$95)	\$1K	

□ Pixel Disadvantage

□ Pixel Advantage

□ Pixel Close in Variance

■ Partner-led Headline Offer

| Confidential and Proprietary



US Launch Offer Comparison: Pixel 8 Pro | iPhone 15 Pro | S23+

TLDR: ATT & Unlocked competitive, VZ continues iP15 Pro GTI, TMO moves iP15 Pro to highest plan boosts UPG on base



Device Plan
\$
\$

Device Plan
\$\$\$
\$
\$

128 GB	Plan Eligibility		Pixel 8 Pro \$999	Max Advertised Value (w/TI)	iPhone 15 Pro \$999	Max Advertised Value (w/TI)	Galaxy S23+ \$999	Max Advertised Value (w/TI)
Gstore	Unlocked		<\$750 off w/TI + Free Watch 2	☐ \$1.1K	<\$650 off w/TI	\$650	\$615 off w/TI + PWP \$475+ \$120 Memory Upgrade	\$1.2K
BBY			<\$800 off w/TI+ Free Watch 2	☐ \$1.15K	N/A	NA	\$150 GC <\$500 off w/TI	\$500
AMZ			Free Watch 2	☐ \$350	NA	NA	\$150 GC \$150 - \$200 IR	\$200
VZ (36 mos)	NLA	Unlimited Ultimate	Free w/TI Select models	☐ \$1K	Free “ON US” w/TI Guaranteed all models - OEMs	\$1K	Free w/TI Select models	\$1K
		Unlimited Plus	<\$800 off w/TI Select \$800/\$400 tiers	☐ \$800	<\$830 off w/TI All \$800 tiers	\$830	Free w/TI	\$1K
	UPG	Unlimited Ultimate	<\$800 off w/TI + CRM	☐ \$800	<\$830 off w/TI	\$830	<\$800 off w/TI	\$800
		Unlimited Plus						
	NLA Phone+Bundle (ARPU)		+ GWP Free Watch 2 (N) *Galaxy bundle advertised	☐ \$1.4K	+ PWP Watch (N) + iPad (N)	\$1.4K	GWP Tab S9 FE (N) + PWP Watch (N) *Pixel advertised	\$1.7K
NLA Switcher GC		+ Switch to VZ get \$200 Gift Card						
TMO (12 ¹ - 24 ² mos)	NLA	Go5G Next ¹	<\$800 off (No TI)	☐ \$800	Free “ON US” w/TI	\$1K	<\$800 off (No TI)	\$800
		Go5G Plus ²		☐ \$800	Free On Us <\$830 off w/TI	\$830		\$800
		~5G plans (Magenta Max, Go5G, Magenta, Essentials)	\$400 off (No TI) (Magenta Max not advertised)	☐ \$400	\$650 <\$830 off w/TI (Magenta Max not advertised)	\$830	\$600 off (No TI) (Magenta Max not advertised)	\$600
	UPG	Go5G Next	<\$800 off w/TI	☐ \$800	Free w/TI	\$1K	\$800 off w/TI	\$800
		Go5G Plus			<\$830 off w/TI			
		~5G plans (Magenta Max, Go5G, Magenta, Essentials)	<\$500 off w/TI (Magenta Max not advertised)	☐ \$500	<\$350 off w/TI (Magenta Max not advertised)	\$350	<\$350 off w/TI (Magenta Max not advertised)	\$350
NLA Phone+ Bundle (ARPU)		+ GWP Free Watch 2 [Phone purchase required]	☐ \$1.2K	Free Watch SE (N-2) [No phone purchase qualifier]	\$1.3K	Free Watch 6 (N) [No phone purchase qualifier]	\$1.1K	
AT&T (36 mos)	NLA / UPG	Premium Plans	Free \$1040 off w/TI (min TIV \$35)	☐ \$1K	Free “ON US” w/TI (min TIV \$230)	\$1K	<\$1000 off w/TI (min TIV \$35 \$95)	\$1000

□ Pixel Disadvantage □ Pixel Advantage □ Pixel Close in Variance ■ Partner-led Headline Offer

US NPI Launches: Motorola Razr (2023) and Samsung 23 FE (2023)

TLDR: xx

Product	Moto Razr (2023) MSRP: \$659 (ATT) / \$699 (Unlocked)	S23 FE (2023) MSRP: \$599
Pre-Order	October 12th	October 3th (Announce - No Pre-Order)
On Sale	October 19th	October 26th
Pre-Order Offer	\$100 IR	No offer listed
1P Motorola.com	\$100 off (\$599)	No offer listed (sign up only)
Verizon	Not Listed	Not Listed
TMO	Not Listed	Not Listed
AT&T	NLA/UPG: \$588 off No TI (@\$2/mo for 36 moths) Placement: Deals Page (2F), Category Page (3F)	Not Listed
BBY US	\$100 IR	No offer

US Launch Promo Competitiveness Analysis: Considerations Taken

Terminology & Offer Values:

- **TLDR:** Overall we looked at how the Carriers prioritize their hero offer message (SOV), products, plans in the point of view of a customer
- **Max Advertised Value** = Maximum Trade In Value for phone + Max MSRP value the OEM is providing any bundles tied to a device line. *Note: we removed standalone Watch and PEP promos and focused on maximum ARPU bundles only (promos that have a connected device line component).*
- **NLA** = New Line Activation: upgrading / reinstating or joining a new plan for another 36 months (ATT/VZ) or 12 to 24 months (TMO) with Carrier
- **UPG** = Upgrade: you are a customer with an existing data plan and you are upgrading your device in the same plan)
- **TI** = Trade In: you have to bring in a device to be eligible for the promotional offer)
- **TIV** = Trade In Value: min or maximum value your device needs to be in order to be eligible for that offer (< = up to \$value off)
- **GWP** = Gift with Purchase: you have to purchase a phone to qualify for the FREE Gift [VZ Bundle is called BMSM = Buy more save more]
- **PWP** = Purchase with Purchase: you have to purchase a phone to qualify for a \$ off discount on the item
- **ARPU** = Average Revenue per Unit: promos where you can make multiple revenue off of a smartphone purchase by adding extra new line of service of connected accys ie. Watches, Tablets
- **GC** = Gift Card N: device was made in current year, N-1, N-2: device was made in previous years, bundle offer can be an older generation Tablet or Watch

5G Premium Data Plans



(36 mos)	Per line	2 lines	3 lines	4 lines
Unlimited Ultimate (launched: Aug 2023)	\$75	\$65	\$50	\$40
Unlimited Plus	\$65	\$55	\$40	\$30
Unlimited Welcome	\$60	\$50	\$35	\$25

Based on autopay and BYOD discount

VZ Customers	NLA	UPG
- Participates in Promo on TI on Unlimited Plus & Unlimited Ultimate	75%	
- VZ customers (all plans) who participate in promo during Launch	10%	90%
--- participate in promo post Launch	~15%	85%
Source: VZ Partner feedback (Oct '23)		



Mos	Plan	Netflix	Apple TV (6 mos)	Per line	2 lines	3 lines	4 lines
12	Go5G Next ¹	✓	✓	\$100	\$85	\$60	\$56
24	Go5G Plus ²	✓	✓	\$90	\$75	\$50	\$46
24*	Magenta Max	✓	✓	\$85	\$70	\$57	\$50
24*	Go5G	n/a	n/a	\$75	\$65	\$44	\$38
24*	Magenta	n/a	n/a	\$70	\$60	\$47	\$40
24*	Essentials	n/a	n/a	\$60			

TMO Customers (Baystreet Data - being validated)

- Go5G Next (Launched August 2023) 5% (Oct '23)
- Go5G Plus (Launched April 2023) TBC
- Magenta Max (Launched Feb 2021) 75% (April '23)
- All other 5G Plans TBC

*Tbc if plans will shift past 24 months



(36 mos)	Per line	2 lines	3 lines	4 lines
Unlimited Premium	\$85	\$75	\$60	\$50
Unlimited Extra	\$75	\$65	\$50	\$46
Unlimited Starter	\$65	\$60	\$45	\$35

ATT Customers	NLA	UPG
Based on previous TI results on ATT customers participating in Pixel promo	45%	55%

Source: ATT Account feedback (Oct '23)

Evaluation US Digital Promo Audit | Summary of Promo Changes (Week of Oct 9)

Questions? Actions (please include in the following slide or comment @chotalia) | Source: go/pixeloffers-WBR

Account	Action	Update
Commentary for Week of October 9 - 13		
TLDR		This week Motorola Razr went on pre-order at AT&T, Pixel 8 goes on sale, Samsung S23 FE to go on sale on 10/26.
Motorola Razr		Motorola Razr (\$699) went on pre-order on 10/12 (On Sale on 10/19), Pre-Order offer listed on BBY and Motorola.com at \$100 IR (\$599). Not listed on Carrier PDPs except for ATT @ \$2/mo no TI.
Samsung FE		Samsung S23 FE 2023 (\$599) announced on 10/3, on sale will go live on 10/26, no pre-order or PDPs listed across partners including SS.com
1P		↑ S23+ removed Memory Upgrade, increased PWP
BBY, AMZ		↑ S23+ removed \$150 GC to BBY and AMZ
TMO		TMO seeing OOS across all iPhone 15 Pro base models across all colors (backorder for mid Oct-November) ↓ TMO turned on BOGO offers with iPhone 13-15 series get a second line for <\$700 off (any plan) ↑ TMO improved eligibility for Pixel Upgrade from Pixel 7 to include Pixel 6 models, upgrades also improved on Pixel for iPhone upgrade tiers
ATT		↑ ATT removed iPhone 15 from Free to \$3/mo on 10/13, ATT changed Min TIV value for S23+ models from \$35 to \$95 (still is \$35 for S23 base model) ↓ Moto Razr launched on ATT, NLA/UPG: \$588 off No TI, (@\$2/mo for 36 months), Placement: Deals Page (2F), Category Page (3F)
Monday, 10/9		
AMZ, BBY	[INFORM]	\$100 GC and \$200 (GC + IR) taken off S23 and S23+ models Link
SS 1P	[INFORM]	\$114 PWP Watch Introduced on S23 series
TMO	Resolved on 10/9	Per TMO Partner Mktg: TMO shared that Magenta Max was because the \$650 for iPhone was only for that tier, all of the 5G qualifying plans are eligible and they can't delineate. ↓ Pixel PDPs do not show which data plans are eligible (its available to Go5G, Magenta and Magenta Max customers) Link
VZ	Resolved on 10/9	Per VZ Partner Mktg: "Regarding the ask if we're able to change generic smartwatch to call-out Pixel Watch, the offer construct built for this promotion is developed to auto populate our PDP page, therefore lists it in more generic terms. At this time, this cannot be changed. Our Dig Ops team is looking into the auto-process and ways to enhance the experience and opportunities to solve for future device launches" ↓ Highlighting Pixel Watch2 GWP in checkout Link
Tuesday, 10/10		
AMZ	[INFORM]	Amazon Prime Best Deals Day starts today - 10/11
AT&T	[INFORM]	↑ Pixel 8 Pro on Homepage Marquee ATF (above the fold) went live
Wednesday, 10/11		
ATT	[INFORM]	↑ Samsung S23+ Min TIV went up from \$35 to \$95 (Pixel 8 is still at \$35 as is S23 base)
AMZ	[INFORM]	IR \$150-\$200 introduced for S23/+ (removed GC)