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US Digital Weekly Business Review go/digitalwbrs

WBR Master Folder (with all past decks)

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Execution Opportunities / Gaps

Call out	Detail	First Reported on
Continued 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).	Fixed (with the roll out of new offer of \$5/mo)
Low / No placements for ‘Get For Free’ promos on AT&T and T-Mobile Deals pages	P7 Pro and P7 offers not present on AT&T Deals pages P7 offer present on T-Mobile deals page at bottom after other OEM bundle offers, etc.	<u>27 Feb</u>
Lower promotion publicized on BestBuy for P7 / Pro, falling visibility for stronger carrier offers	<ul style="list-style-type: none"> ● Actual offers on PDP \$300 & \$250 for P7 Pro/P7 resp. ● Publicized offer on Deals Page is \$150 ● Carrier trade-ins of upto \$900 have <u>lower visibility</u> 	<u>13 Mar</u> (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"> ● Unique discount worth \$540 launched for Pixel 7 Pro ● Competition widened trade-in offers for All Unltd plans ● Pixel sales improved on VZN indicating good performance of Non-TI promo despite lower TI ● Similar observation on AT&T in last 3 weeks 	Target upto Deals page placements, Correct promo messaging on Verizon
Samsung exploits power of its complete portfolio by offering ‘something for everyone’	<ul style="list-style-type: none"> ● Higher memory variant S23 models being pushed via placement / promos (higher \$ value customers) ● Upcoming A54 targeted at price-conscious ones 	Consider balancing promotions across P7/Pro and P6a to compete
Samsung seems to be gaining unequivocal share on Android on T-Mobile and AT&T	<ul style="list-style-type: none"> ● SS is regaining Android share & dominating placements ahead of A54 launch, while Pixel has low visibility 	Negotiate with AT&T & T-Mo to offer equal / comparable Android placement per carrier agreements

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 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

		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	Δ 10%	1.5M	Δ -5%
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	12.4M Δ -429.3K	45.4M Δ -140.5K	37.8M Δ 168.9K	22.2M Δ 516.0K
Google PDP Traffic	17.0K Δ -9.4K	11.9K Δ 631.0	7.4K Δ -221.0	73.4K Δ -8.4K
Google Share of Traffic	5.3% Δ -2.0%	5.9% Δ 0.6%	4.8% Δ 0.1%	31.2% Δ 1.8%

Overall drop in total Pixel sales however still stronger than W11; P7 sales ↑ on ATT and VZN

Pixel continuing to have <10% share

Pixel outperformed competitors

Continued potential to improve performance of our strong promotions on carriers

Verizon



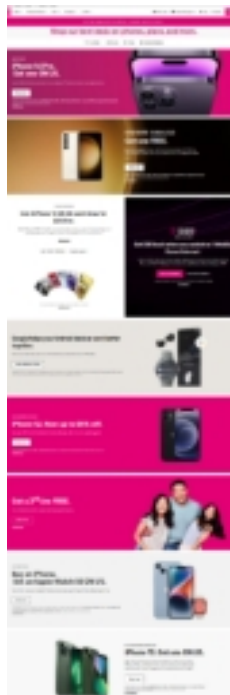
Get Google Pixel 7 Pro for \$10/mo.

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

Buy

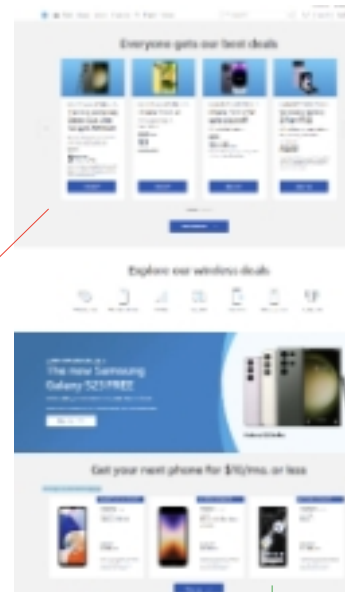
Verizon Promo Messaging on Deals page continues to incorrectly highlight “Select Trade-In”, while it is available for all consumers on the product page.

T-Mobile



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

AT&T



P7 Pro has **drop in trade-in promotion**

Fall in messaging from P7 Pro for FREE → P7 Pro upto \$800 off. Continues to have **no placements**

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






P7 now features beyond 2F of Deals Page

Promotion Changes (As of 3/04)



















































For both P7 / Pro, offer on VZN **fell with trade-ins of \$900 taken off** (though P7 Pro still has UPG trade-in)

On AT&T, P7 Pro **trade-in fell from \$1000 to \$800**

Samsung S23 higher variant offers become **stronger** on Unlocked retailers (Amazon and Bestbuy) but **fall on ATT, including accessory bundles**

				 Carriers + Unlckd	
P7/P7 Pro	P7 Pro- NL TI removed P7- UP TI removed	No change	P7 Pro - Max TI ↓ from \$1000 to \$800	BBY TMO- TI offers removed BBY VZN- TI offers for UP removed	P7 Pro - 512 GB Uniq disc ↑ to \$395
P6 Pro	No change	No change	No change	Unlckd- OOS	No change
i13 Pro/Max	No change	i13 Pro- 128 GB unavailable	i13 Pro Max- OOS	BBY VZN- i13 Pro Max 512GB unavailable	No change
S23+/Ultra	No change	No change	Bundle Offer removed	BBY Unlckd [S23 Ultra] -256/512 Uniq disc ↑ \$200 [S23+]- 256GB Uniq disc ↑ \$150	Uniq disc ↑ \$100
Flip/Fold4	No change	Z Fold 4-512 GB unavailable Z Flip 4- 256 GB unavailable	Bundle Offer removed	No change	No change
S22+ /Ultra	No change	No change	Bundle Offer removed	BBY-TMO-128/256 GB disc ↓ to \$250 512 GB Disc ↑ to \$350 BBY-ATT- Uniq disc ↓ by \$200 NL, \$100 UP BBY-Unlckd- Disc ↑ to \$150	No change
Z Fold3	No change	No change	Bundle Offer removed	No change	No change
A53	No change	No change	Bundle Offer removed	No change	A53 MSRP ↑ by \$10
i14 Pro/Pro Max	No change	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>Homepage</i>) (\$200 Switch + \$540 UniQ Disc + Upto \$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 for \$800 off with T/I (<i>Listings page</i>)</p> <p>P7 at \$10/mo, no trade-in required (<i>Deals Page</i>) (\$300 Discount + Upto \$380 AT&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>	  	  	  
	P7 Pro: \$150 off on listing price, P7: \$150 off on listing price	  	  	  

Landing Page Screenshots for Reference

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	0↓	1000	0	1000	1000	1000	0	800	800	-
	UPG	Discount	-	-	-	-	-	-	-	-	-	-
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	800	800	800	800	800	800	0↓	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	-	-	-	-	-	-	-	-	-	-

- Trade-in unavailable for P7 Pro Newline (on either plan), continues to be available on Select Premium Plans - Upgrade
- Trade-in unavailable for P7 Upgrade (on either plan)

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	-	-	0↓
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	800↓	800	800	800	800	999	350*	800	799	350
	UPG	Discount	-	-	-	-	-	-	380	-	-	0↓
		BOGO	-	-	-	-	-	-	-	-	-	-
		Max TI	800↓	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)

- Trade-in **fell** from \$1000 → \$800 for P7 Pro both Newline & Upgrade.
- Unique discount **unavailable** for S22 this week.

Pixel at disadvantage Pixel at advantage Pixel on par

			Premium & Ultra Prem Segment						Mid Segment			
			P7 Pro (\$899)	i14 Pro (\$999)	i14 Plus (\$899)	S23 Ultra (\$1199)	S23+ (\$999)	Flip4 (\$999)	P7 (\$599)	i14 (\$799)	S23 (\$799)	S22 (\$699)
Magenta Max	NLA	Discount	501	-	-	800	800	800	500	-	800	700
		BOGO	-	350	350	-	-	-	-	350	-	-
		Max TI	600	1000	900↓	400	400	400	600	800↓	400	400
	UPG	Discount	-	-	-	-	-	-	-	-	-	-
		BOGO	-	350	350	-	-	-	-	350	-	-
		Max TI	600	400	400	400	400	400	600	400	400	400
Mainstream	NLA	Discount	500	-	-	400	400	400	500	-	400	400
		BOGO	-	350	350	-	-	-	-	350↑	-	-
		Max TI	300	800	800	400	400	400	300	800	400	400
	UPG	Discount	-	-	-	-	-	-	-	-	-	-
		BOGO	-	350↑	350↑	-	-	-	-	350↑	-	-
		Max TI	300	400	400	400	400	400	300	400	400	400

- Max TI reduced to \$900 from \$1000 for i14 Plus & i14 in T-Mobile Magenta Max NLA
- BOGO values increased to \$350 for i14 Pro, i14 Plus & i14 in T-Mobile Mainstream UPG