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

**WBR Master Folder** (with all past decks)

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**US 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)

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Call out	Detail	First Reported on	Action Owner
VZN: Pixel Buds PWP banners missing from Pixel PDPs; instead Samsung attaches Watch / Tab	<ul style="list-style-type: none"><li>PWP 50% off Google Buds Pro, not advertised on Pixel PDP.</li><li>However, VZN PDPs (including Pixel devices) promote the Galaxy S9+ Tab and Watch6 PWPs</li></ul>	24 Jul [VZN]	VZN: Dallas (CSA) Justyna (PM)
Lower Pixel promo value advertised v/s actual on T-Mo			

Other Insights

Call out	Detail	Suggested Action
Samsung leads with Flip5 messaging/ placements; Flip5 gains stronger demand than Fold5 as result	<ul style="list-style-type: none"><li>Across carriers, Flip5 registers stronger demand than Fold5 (ongoing YoY trend).</li><li>Flip5 &amp; Fold5 demand gap widest on VZN (20K Desktop visits for Flip v/s 14K for Fold); lowest on ATT <a href="#">[Traffic trends dashboard]</a></li><li>Similar Google search trends observations YoY</li></ul>	Monitor Pixel Fold competitiveness v/s Flip5
VZN 'S23 FREE' HP & Deals Page banner performs well	<ul style="list-style-type: none"><li>S23 saw 70% WoW demand growth on VZN to &gt;22K visits in response to 'FREE' deal w strong placement across HP, Deals pages since last weekend</li><li>The banner has 'ON US' messaging, tactically excluding trade-in requirement</li><li>i14 Pro Max still remains highest demand model on VZN with 56K visits, followed by i14 Plus. Pixel Fold continues to see soft demand despite strong placements</li><li>NEI Ticket Attach / performance to be tracked next week</li></ul>	Closely monitor Samsung portfolio push and performance

## Sales Drivers

- Pixel Fold traffic drops post Galaxy Unpacked Event VZN (↓ 30%) and AT&T (↓ 4%)
- P7 series sales grew slightly (~↑7%) on VZN however PDP traffic continues to diminish WoW. On AT&T, P7 demand witnessed slight growth.

### Sales

Total WoW	Pixel 7a 8,874 -1%	Pixel 7 7,361 -28%	Pixel 7 Pro 5,576 -13%
Sales			
Wk 30	VZN 8,579 Δ 5.6%	TMO 4,861 Δ -9%	AT&T 5,864 Δ -26%
	BB 2,517 Δ -25%		
Mkt Units	Pixel 7		Pixel 7 Pro
As of Wk 27	190K Δ 0%		1.3M Δ 6%
Mkt Share	15.1% Δ -1.4%		1.9% Δ 0.9%
As of Wk 27			



### Traffic

	VZN	TMO	AT&T	BB
Total Partner Traffic	13.9M Δ 5.0%	52.4M Δ -2.6%	43.0M Δ 4.5%	22.3M Δ -2.1%
Google PDP Traffic	26.6K Δ -19.1%	25.8K Δ -27.3%	15.5K Δ -7.7%	37.3K Δ -42.8%
Google Share of Traffic	8.9% Δ -2.8%	11.3% Δ -3.5%	9.6% Δ -1.8%	15.4% Δ -13.5%

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

Overall P7 / 7a / Pro sales declined

VZN experienced slight growth for P7 series sales. P7 sales fell sharply on BBY & AT&T (↓ 26% WoW)

PDP Traffic drops firmly on BBY (↓ 43%) and T-Mo (↓ 27%)

*Updated as of 31 Jul*  
**Refreshed Mondays**

As of 07/31/25 series supersedes Pixel Devices in visibility on AT&T Home Page and Deals page

- On Verizon's deals page Pixel's visibility weakens, as S23 and Z5 banner placements improved and Pixel's 1F placements dropped to beyond 3F
- On TMO, **Pixel Fold is not present on the homepage and deals page**, leading to disadvantage during Z5 launch

## Verizon

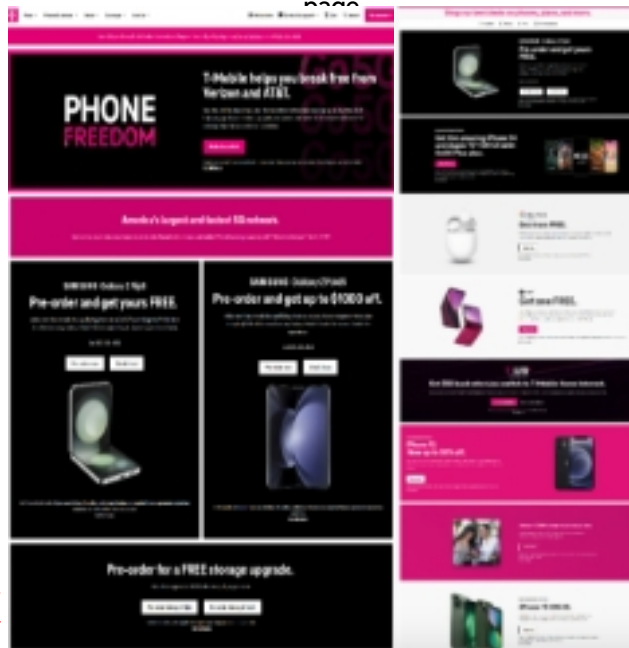


Verizon: Pixel Fold banner is placed on 1F on Home page, while beyond 3F on deals page.

Moreover, **Pixel Fold** promo not updated with **bundle** offers.

## T-Mobile

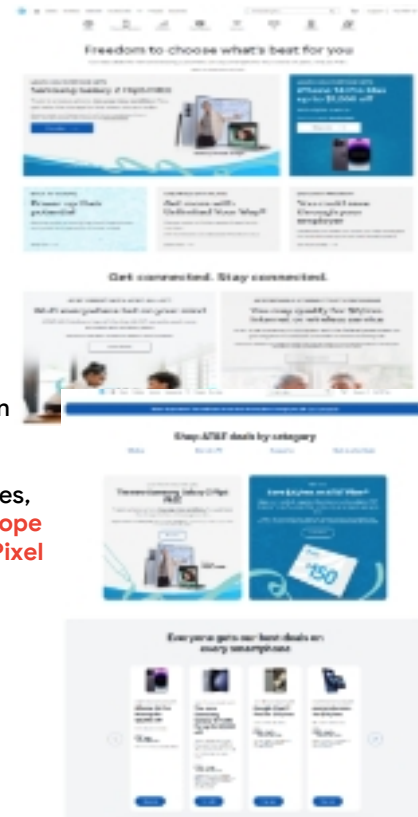
TMo: Pixel devices have no presence on Home



Home page

Deals page

## AT&T

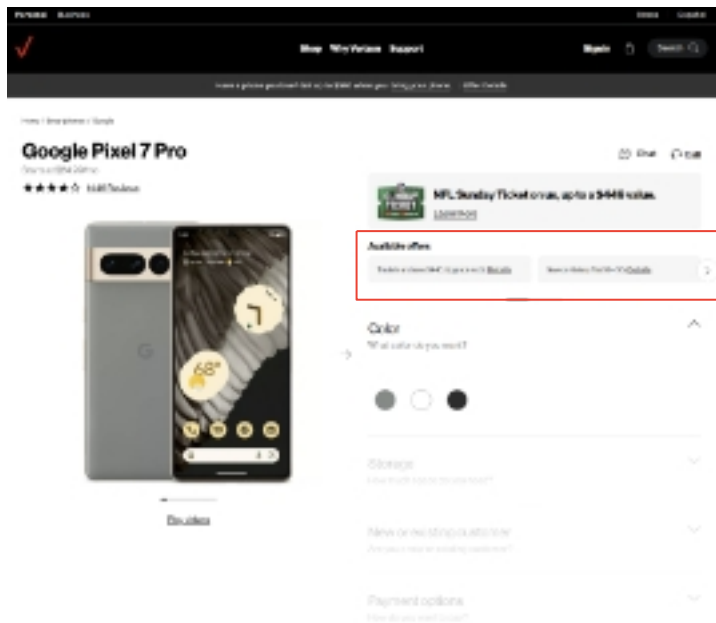


AT&T: Pixel Device banner continue to dominate landing pages, however **scope** to include Pixel Fold

## Pixel opportunities on VZN: Additional PWP offer (bundle) missing

**PWP 50% off Google Buds Pro, not advertised on Pixel PDP.**

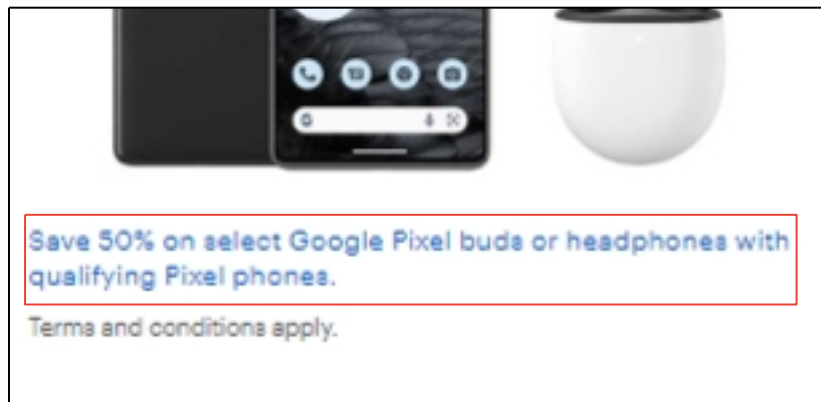
However, VZN PDPs (including Pixel devices) promote the Galaxy S9+ Tab and Watch6 PWPs



### Pixel Buds Pro PDP

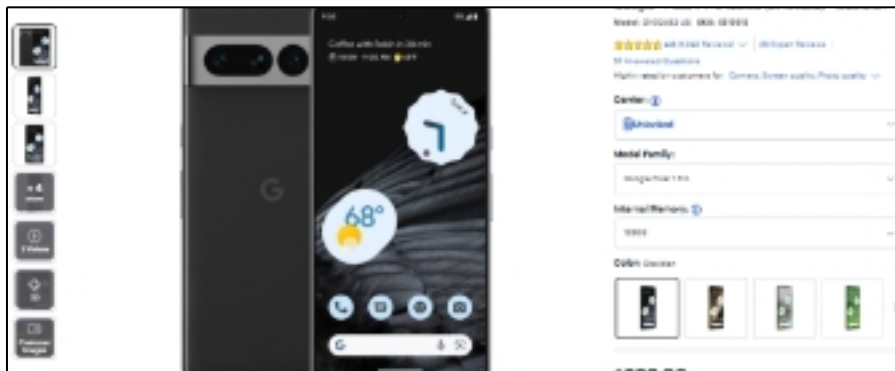


## Missed Pixel opportunity on Best Buy Unlocked - PWP offer missing on PDPs



Bundle offer of 50% off on Pixel Buds with Pixel Phones

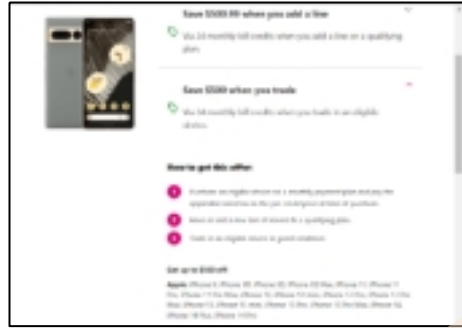
Missed Opportunity: Bundle Offer not advertised with Pixel Phone PDP's



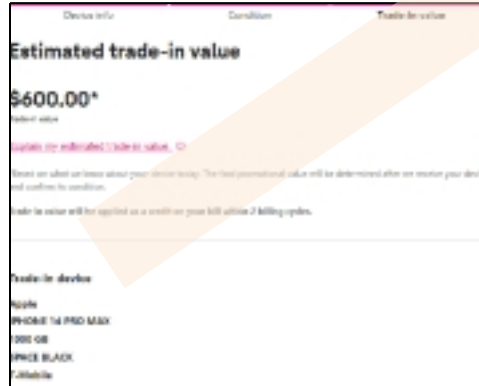


## Lower Promo Value advertised than actual for Pixel on T-Mobile (competition models have accurate promo messaging)

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



But Actual savings on  
clicking upon 'Check TI  
value' go as high as  
**\$600**, (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) where  
advertised TI value is  
equal to actual



CSA Reviewing



# Galaxy Fold/Flip 5 vs Pixel Fold US Promo Comparison (On Sale: 8/11)

**TLDR: Aggressive Pre-Order offer (max value: \$2.1K) <\$1000 TI + free memory with new GWP \$700+ bundles**



	Pixel Fold MSRP: \$1799/\$1919 256/512GB		Galaxy Fold 5 MSRP: <\$1799/\$1919 256/512GB	Galaxy Flip 5 MSRP: \$999/\$1119 256/512GB
	Pre-Order Offer (5/10 - varies)	Current Offer	Pre-Order Offer (7/31 - 8/11)	
1P	GWP Rohan Max Value: \$399	50% off Buds/Pro (ends 8/5) Max Value: \$100	< \$1000 w/TI + \$720 PWP Bundle + Memory Upgrade Max Value: \$1.8K	<\$900 w/TI + \$670 PWP Bundle + Memory Upgrade Max Value: \$1.7K
AMZ US	No offer	No offer	<u>\$200 AMZ GC</u> + Memory Upgrade Max Value:: \$320	<u>\$150 AMZ GC</u> + Memory Upgrade Max Value: \$270
BBY US	No offer	No offer	\$100 Best Buy GC + Memory Upgrade Max Value:: \$320	
VZW	GTI: \$900, GWP Rohan Max Value: \$1299	UPG: <\$440 w/TI NLA: <\$1000 w/TI + \$1K PWP Bundle [Free Watch w/NLA] + NFL Sunday Ticket OEM Value: \$1.4K (NLA) Max Promo Value: \$1.8K (NLA)	NLA/UPG: <\$1000 + \$1K PWP Bundle + Memory Upgrade + NFL Sunday Ticket OEM Value: \$2.1K Max Promo Value: \$2.5K	
TMO	NLA \$1K off, TI upto \$1K off Max Value: \$1000	UPG: \$800 off w/TI NLA: \$800 off no TI + PWP Stretto MAX OEM Value: \$900	UPG <\$1000 TI NLA <\$1000 No TI + Memory Upgrade Max Value: \$1.1K	
ATT	NLA/UPG: \$25/mo (no TI) Max Value: \$980	NLA / UPG <\$1000 w/TI Max Value: \$1000	NLA/UPG: <\$1000 off w/TI + Memory Upgrade Max Value: \$1.1K	

## Key Observations:

- Strong SOV on “Flip” as hero device over Fold across promo campaigns
- Flip and Fold 5 pre-order offers <\$1K off targeting base and NLA and Free Memory Upgrade to 512GB both models (same offer YoY)
- 1P GWP Tablet/Watch/Buds offer (\$720 value) with NPI products
  - \$200 IR Tab S9, <\$240 off Watch6 + \$180 IR on Galaxy Buds2 Pro
- VZ Pixel and Fold5 Offer: Customers can get a Free Tablet, Watch6 or Pixel Watch (\$1K value) in addtn to NFL Sunday Ticket (\$449 value) w/NLA
  - \$669 Tab S7, \$350 Watch6, \$399 Pixel Watch

<span style="background-color: #f8d7da; border: 1px solid #f5c6cb; padding: 2px;"></span> Pixel at disadvantage	<span style="background-color: #d4edda; border: 1px solid #c3e6cb; padding: 2px;"></span> Pixel at advantage
<span style="background-color: #fff3cd; border: 1px solid #ffeeba; padding: 2px;"></span> Pixel on par	<span style="background-color: #d6d8db; border: 1px solid #d6d8db; padding: 2px;"></span> No Offer

**Max Value** = total promo value with phone offer + discounts (does not include incremental data plans or services)