



US Digital WBR Report

December Analysis - WK 51

[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 (all historical decks)

Summary

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Symphony Resources

AMER Promo Offers:
go/pixeloffers

Promotions:
go/pixelpromotions

US Traffic Dashboards:
go/pixelonlineus

US Promo Trackers:
go/pixelpromotracker

US Exec Dashboard:
go/pixelperformance

Historical Digital WBRs

2023

March

<u>W1 </u> 6 Mar	<u>W2 </u> 13 Mar	<u>W3 </u> 20 Mar	<u>W4 </u> 27 Mar
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April

<u>W1 </u> 3 Apr	<u>W2 </u> 10 Apr	<u>W3 </u> 17 Apr	<u>W4 </u> 24 Apr
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May

<u>W1 </u> 1 May	<u>W2 </u> 8 May	<u>W3 </u> 15 May	<u>W4 </u> 22 May	<u>W5 </u> 29 May
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Jun

<u>W1 </u> 05 Jun	<u>W2 </u> 12 Jun	<u>W3 </u> 19 Jun	<u>W4 </u> 26 Jun
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July

<u>W1 </u> 03 July	<u>W2 </u> 10 July	<u>W3 </u> 17 July	<u>W4 </u> 24 July	<u>W5 </u> 31 July
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2023

August

<u>W1 </u> 07 Aug	<u>W2 </u> 14 Aug	<u>W3 </u> 21 Aug	<u>W4 </u> 28 Aug
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September

<u>W1 </u> 04 Sep	<u>W2 </u> 11 Sep	<u>W3 </u> 18 Sep	<u>W4 </u> 26 Sep
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October

<u>W1 </u> 03 Oct	<u>W2 </u> 09 Oct	<u>W3 </u> 16 Oct	<u>W4 </u> 23 Oct	<u>W5 </u> 30 Oct
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November

<u>W1 </u> 06 Nov	<u>W2 </u> 09 Nov	<u>W3 </u> 20 Nov	<u>W3 </u> 27 Nov
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December

<u>W1 </u> 04 Dec	<u>W2 </u> 11 Dec	<u>W3 </u> 18 Dec
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KPI deep dive

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

WK 50: Dec 10- Dec 16

Sales Drivers

- Overall, **Google Brand traffic grew on VZ: ↑18%** and **TMO: ↑13%** however SoT remained flat
- On VZ, **P8 series saw significant demand surge (>↑70% each)**, coinciding with the new **UPG Contingency offers** ([ref](#)) as well as **growth in sales for P8** (up from 1K→2.1K units)

Total WeW	Pixel 7a	Pixel 8	Pixel 8 Pro	Pixel Fold
Sales	4,319	9,969	11,669	2,679
Wk 50	6%	29%	6%	237%
Wk 50				
	VZ	TMO	AT&T	BBY
Sales	10,827	8,354	4,539	4,916
	Δ40%	Δ9%	Δ24.0%	Δ3%
Mkt Units	Pixel 8		Pixel 8 Pro	
As of Wk 48	453K	Δ130%	1.1M	Δ-11%
Mkt Share	Pixel 8		Pixel 8 Pro	
As of Wk 48	5.1%	Δ-2.2%	5.0%	Δ-0.1%

Sales



Total Partner Traffic

Google PDP Traffic

Google Share of Traffic

VZ	TMO	AT&T	BBY
13.7M Δ 9.4%	45.1M Δ -2.8%	40.6M Δ 1.2%	26.8M Δ 1.0%
63.8K Δ 17.8%	114.5K Δ 12.6%	61.9K Δ -5.6%	85.0K Δ -7.7%
6.1% Δ 0.9%	12.6% Δ 1.0%	9.0% Δ -3.0%	21.5% Δ -2.9%

Traffic

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

Overall, Pixel sales grew across all partners, esp. VZ and AT&T registered the substantial growth.

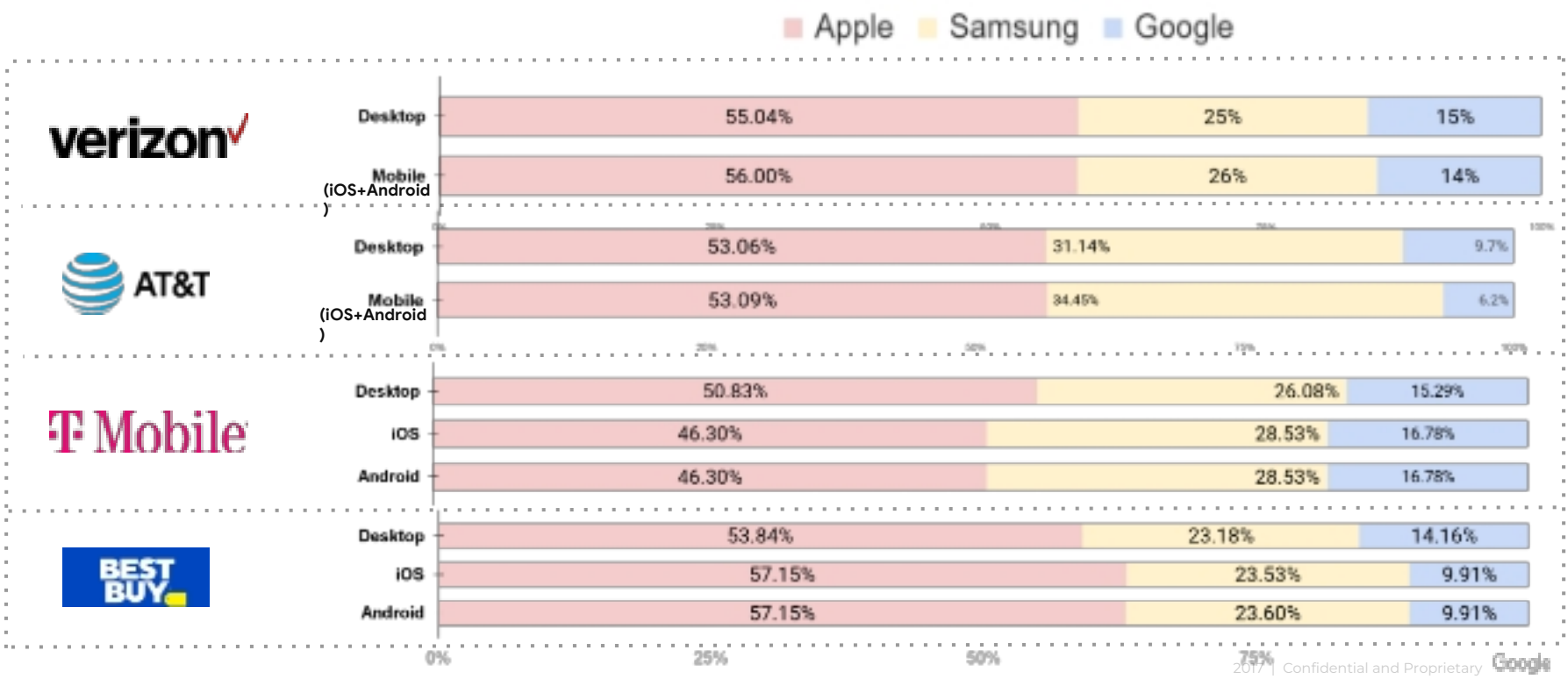
Google Partner Traffic grew on T-Mo & VZ

VZ registered the most significant growth for P8 series

Brand Prominence/ Placements Across Partners (Wk 50: 10 Dec -16 Dec)

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

Apple's prominence **decreases** on AT&T as S23 replaces i15 Pro Max banner on Deals page.
On BBY, Samsung's prominence dips as i15 and Pixel series banner replace S23 series on Phone Categories page.





US - Site Total Traffic Wk50 (Dec 10 - Dec 16)

Carrier by OEM level insights:

- YoY Website traffic grew on AT&T(↑17%), T-Mo(↑2%) and VZ(↑17%) while BBY(↓10%) saw YoY dip
- Overall, YoY traffic grew across all three OEMs with Pixel experiencing **most significant growth (↑14%)**
- Overall, all three OEMs saw WoW traffic growth; iPhone with highest uplift (↑12%) followed by Pixel (↑4%)
- Pixel witnessed strong YoY growth on T-Mo(↑159%) while demand dipped on other partners(BBY:↓15%,AT&T:↓46%,VZ:↓24%)

Model level insights (WoW Insights):

- P8 series witnessed a significant growth on VZ (>75%)
- On T-Mo, P8 registered a slight growth coinciding with the improved TI(\$700) and CRM on P8
- On AT&T, Key product lines of Apple and SS(iP14,i15,S23 series) registered WoW growth while **P8 dipped WoW.**

	TOTAL			BEST BUY			AT&T			T - MOBILE			VERIZON		
Category	This Week	WoW	YoY	This Week	WoW	YoY	This Week	WoW	YoY	This Week	WoW	YoY	This Week	WoW	YoY
Website	126,171,310	608,359 ↑	4.9% ↑	26,800,380	259,228 ↑	-10.1% ↓	40,550,280	496,524 ↑	17.3% ↑	45,144,972	-1,318,584 ↓	2.0% ↑	13,675,678	1,171,191 ↑	17.2% ↑
Pixel	325,248	3.7% ↑	14.4% ↑	84,996	-7.7% ↓	-14.8% ↓	61,922	-5.6% ↓	-46.1% ↓	114,511.48	12.6% ↑	159.4% ↑	63,819	17.8% ↑	-23.6% ↓
Samsung	1,064,388	0.2% ↑	4.3% ↑	177,185	1.0% ↑	-32.2% ↓	273,588	22.5% ↑	3.5% ↑	300,596.25	-20.3% ↓	-3.5% ↓	313,019	9.5% ↑	34.4% ↑
iPhone	1,601,615	12.3% ↑	11.2% ↑	117,922	45.6% ↑	-39.5% ↓	355,368	36.7% ↑	-37.6% ↓	465,518.69	20.9% ↑	34.5% ↑	662,807	-5.4% ↓	24.4% ↑
		WoW	YoY			YoY						YoY			



US Carriers | Dec Contingency Offers Traffic Uplift Analysis

TLDR: VZ higher traffic and increased sales namely on P8, TMo higher traffic but sales flat, ATT improved traffic and sales for Pro w/ UPG

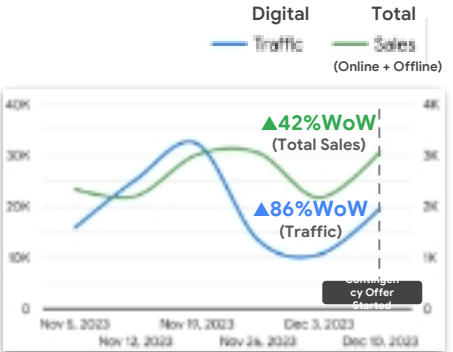
Pixel 8

\$699/\$799

- NEW: Free w/ UPG
- UPG: \$800 off w/TI

Start Date: 12/14

Desktop Traffic source is largely internal pages and limited indication of paid / inorganic so far. More to follow.



Pixel 8 Pro

\$999

- NEW: \$10/mo w/UPG
- UPG: \$800 off w/TI

Start Date: 12/14



NLA: \$400 off No TI

- NLA: \$700 off w/ AAL
- UPG: \$500 off w/TI
- UPG: \$700 off w/TI CRM only

Start Date: 12/7



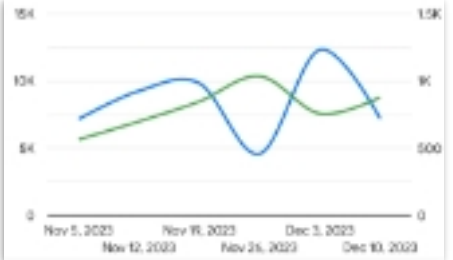
NLA: \$400 off No TI

- NLA: \$700 off w/ AAL (12/7 - 1/16)
- UPG: \$500 off w/TI (10/4 - 1/3)
- UPG: \$700 off w/TI CRM only (12/7 - 1/16)

Start Date: 12/7



NLA/UPG: \$10/mo No TI



NLA/UPG: \$15/mo No TI

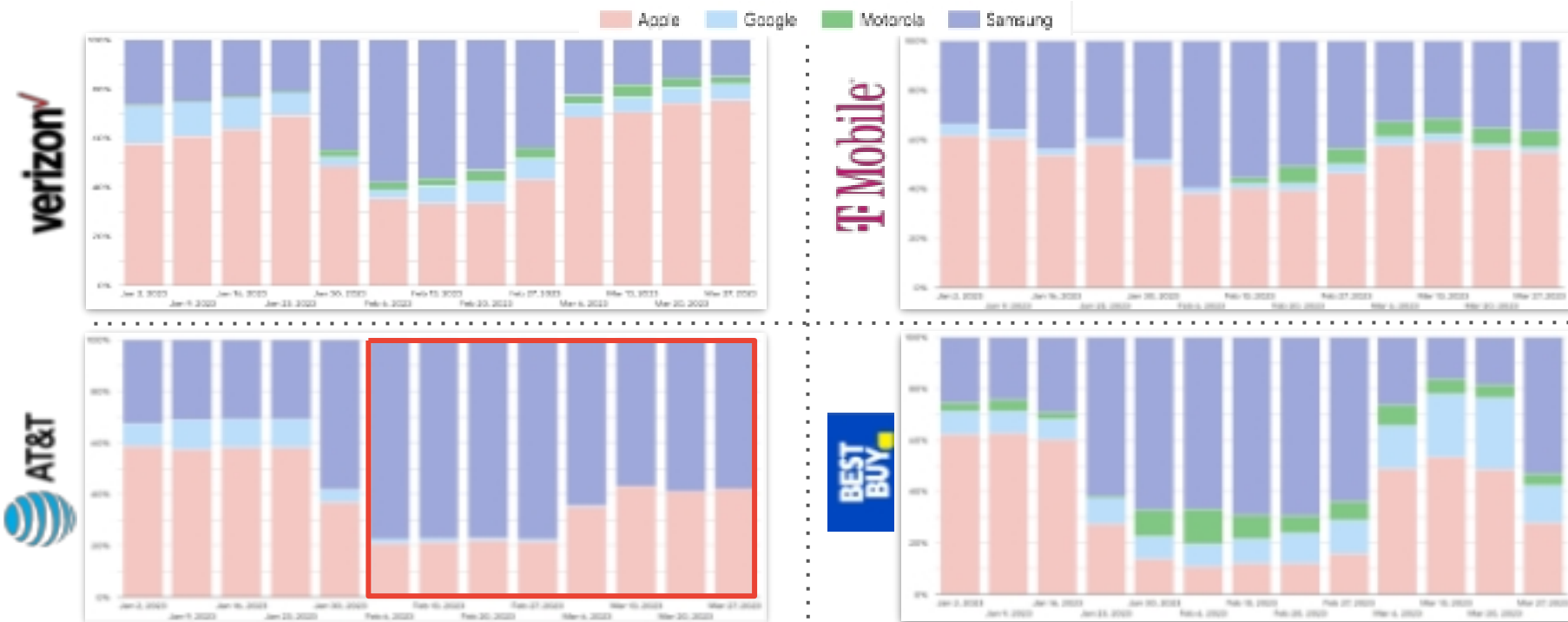
- NEW: \$1040 w/TI

Start Date: 12/8 -





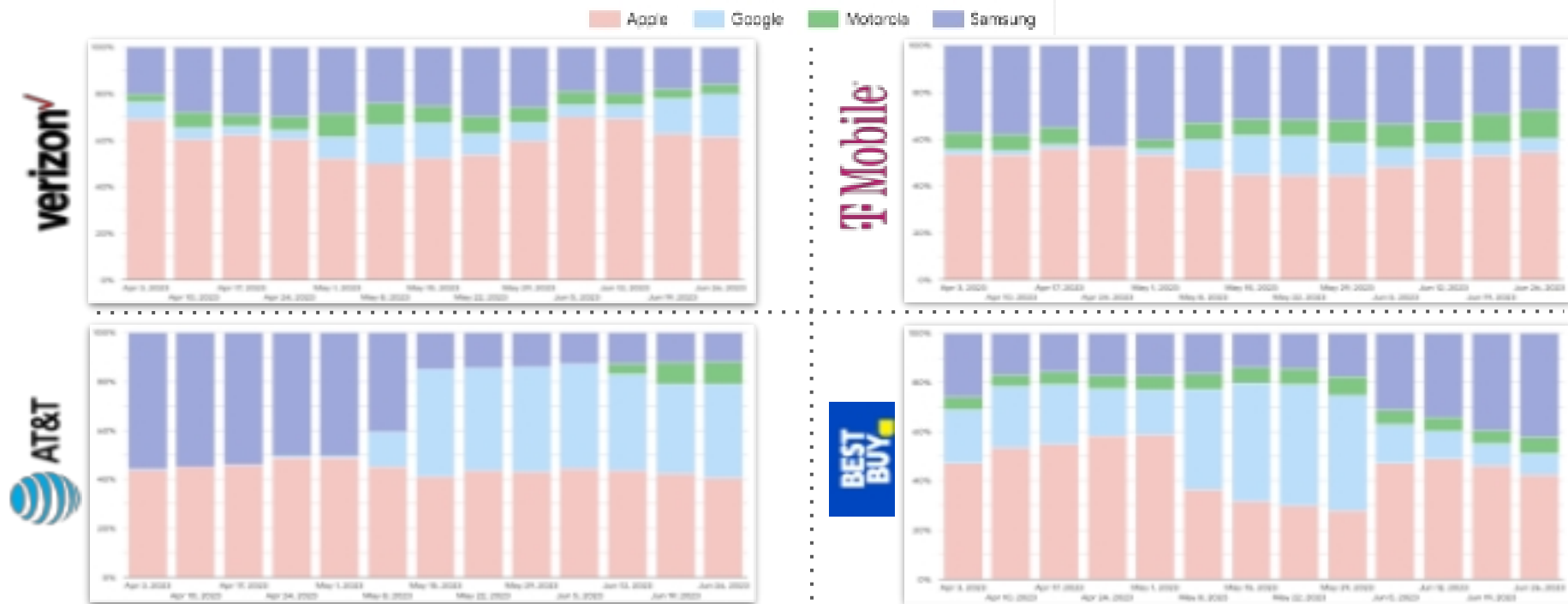
SoV or Brand Prominence distribution across Partners: Q1'23



Insights:

- Samsung dominated SoV for most part of Q1 esp. on AT&T and BBY. Pixel SoV declined steeply on AT&T post S23 launch as SS sustained prominence.

SoV or Brand Prominence distribution across Partners: Q2'23



Emerging Insights:

- Pixel regained prominence on AT&T following the Google I/O event in May (JMA effect?)
- Additionally, BBY also experienced healthy SoV for Pixel in Q2