

Exec Summary

T-Mo emerges as key SS partner for S23 launch

Samsung grew across KPIs on T-Mo: [traffic](#) (~200% WoW growth on T-Mo Desktop PDP visits, highest across all partners), [Prominence](#): S23 took over all homepages upon launch (however Apple posing strong competition) and [Promotions](#): S23 series has upto \$800 TI and \$800 unique discount on the Magenta Max plan

Consider boosting partnerships with AT&T

- AT&T seems to be shifting from its Apple centric approach in 2022 to now increasingly OEM agnostic approach (both P7/Pro and S23 were given adequate placements during launch)
- Pixel has seen growing sales on the carrier
- [In Q4 '22](#), the carrier saw 0.7% YoY revenue growth & gained mkt share by boosting net postpaid subscribers by 656K
- It is focused on boosting fiber services and has positive long-term outlook

Takeaways/Next Steps

Consider increasing RIB / partner funding for P7 Pro since the device now has [weaker promo / messaging](#) (\$600 TI) than Apple / SS devices

PoC

Taylor / Matt

Consider increasing promotional spending on the carrier, and explore broader strategic partnerships aligned with its fiber / broadband growth plans (eg. Nest product tie-ups)

Taylor / Matt

Potential avenues to build market share *(Ideas to shortlist and explore for deep dives):*

- Verizon's device discounts and [overall promotional spending](#) to continue to fall
 - At the same time, [Verizon collaborated with Microsoft last month to launch Teams](#) offering
 - Apple has already worked on a Verizon specific iPhone phone plan→ Consider a similar plan / service collaboration, and leverage GSuite services / Workspace tools as part of offerings
- [Market for extended warranties to keep growing, highest growth in smartphone category](#) (AppleCare+ and Google Preferred Care)
Consider boosting offering + highlighting benefits within our key marketing messages



Consumer Marketing Messaging | Key Models

Highlights

- Both Samsung and Apple have strong messaging on T-Mo across segments, leading to a disadvantage for Pixel
- The Galaxy S23 series seems to have launched with a specific carrier-wise focus: AT&T is promoting S23 Ultra, Verizon S23+ and T-Mobile S23/ Ultra

Opportunities for Pixel

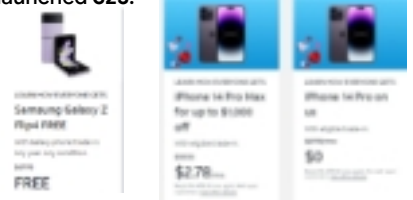
- VZN - the carrier with highest MM strength for Pixel (P7 Pro has \$900 max TI) - has offers no visibility for P7 Pro on any key landing pages, with the device present only on the bottom fold of the listings page with no mention of the TI offer



- **Hero device: Galaxy S23 Ultra** is being promoted across all landing pages with strong promo messaging (FREE/ Up to \$1000 off with a Galaxy phone trade-in).



- Except P6a in 'Phones for \$5/mo or less', Pixel is not being predominantly promoted on any of the landing pages, except the listings page.
- For their Valentine's Day deals, Apple has highlighted its i14Pro and i14 Pro Max with strong promo messaging (ON US/ Up to \$1000 off), as Samsung promotes its Galaxy Z Flip4 with strong promo messaging (FREE) over the recently launched S23.



- Samsung continues to dominate top folds of all landing pages with their new launch, have **taken down all S22 series promotions**. 'Pre-order the new Samsung Galaxy S23+. And get a Watch and a Tab. All on us' & 'Free storage upgrade when you buy Samsung Galaxy S23 series'.



- None of the landing pages promote the trade-in offer **upto \$900** for the P7 Pro. It is present only on the bottom fold of the listings page with no marketing message.
- Apple continues to hold a spot on the Homepage and the Deals page with strong marketing messages for their i14 and i14 Pro.



- **Hero Device: Galaxy S23/ Ultra** now dominates top placements on the carrier website with strong promo messaging - ON US and FREE, respectively, followed by i14 Pro.



- Samsung has successfully taken over nearly the entire T-Mo home page, and its Watch banners on the home page now precede the long standing placement that Apple & Pixel Watches have on Deals page

Highlights

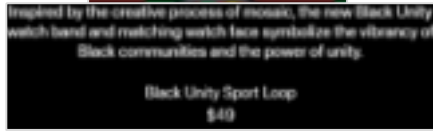
- Samsung.com increased TIVs for its own devices while dropped them for Google and Apple devices.
- Significant fluctuations in Samsung device offers on SS.com - S23 Series offers dropped by \$500 1W post launch, and shot back up in 2-3 days
- Apple.com 1P has responded to the S23 announce by dropping its TI values by upto \$50. Its website has a broad-based focus, with banners highlighting the SuperBowl, Black communities etc.
- All competitors 'n-1' series promotions on BestBuy's landing pages have been taken down, providing stronger spotlight to the newly launched S23 series.



- Samsung has finally unveiled the newline of Galaxy S23 series phones and placed it on its landing pages.
- All S22 series and Apple's 'n-1' series advertisements have been replaced by the new S23 series promotions. Apart from the newly launched series, only P7 Pro, P6a Z, i14 series are being marketed on the Deals page.
- Samsung has reduced its trade in offer from \$1400 to \$1000 for Galaxy Z series



Apple.com (1P)



- Apple has launched a new Black Unity watch band and matching watch face, raising awareness around the importance of Black communities and the power of unity.



- With Valentine's Day approaching, Apple is offering a discount of \$50 across all models of Watch Series 8.

SAMSUNG

Samsung.com (1P)

- Samsung continued to promote its Galaxy S23 Ultra on the landing page with top banner placement and strong promo messaging - Up to \$780 off.



- However, Samsung's S23 unique discounts saw a drop of ~\$500 mid-week, about a week post announce (7 Feb)
- Samsung is also promoting its deal with \$100 Bestbuy Gift Card.



Marketing Messaging by carrier for key models | As of 06 Feb

Indicates that P7/Pro's MM is! ☐ = At an advantage ☐ = On par ☐ = Has some gap ☐ = At a disadvantage to the resp comp model

Segment	Model	AT&T (36/mo)	Max. T/I	Verizon (36/mo)	Max. T/I	T-Mobile (24/mo)	Max. T/I
\$800 - \$1000	P7 Pro	Get this FREE w/ trade	\$939	Starts at \$24.99/mo. For 36 months; 0% APR	\$900	Save up to \$600 on P7 Pro	\$600
	P6 Pro	\$26.12/ mo	\$350	Save \$300. Online only.	\$0	Unavailable	-
	i14 Pro max	<input type="checkbox"/> Up to \$1000 off w/ Trade	\$1000	<input type="checkbox"/> Starts at \$30.55/mo. For 36 months; 0% APR	\$1000	<input type="checkbox"/> Get up to \$1000 off with trade and New Line on Magenta MAX	\$1000
	i14 Pro	<input type="checkbox"/> i14 Pro on us	\$1000	<input type="checkbox"/> Great deal to love. Get the new Apple watch SE, on us	\$1000	<input type="checkbox"/> 14 Pro. Get one ON US	\$1000
	i13 Pro Max	<input type="checkbox"/> \$20/mo - No trade-in required	\$350	(marketing message absent)	\$0	Unavailable	-
	i13 Pro	<input type="checkbox"/> \$15/mo - No trade-in required	\$350	(marketing message absent)	\$0	<input type="checkbox"/> Get up to \$730 off with trade and new line	\$730
	Z Fold4	<input type="checkbox"/> Up to \$1000 off w/ Trade	\$1000	<input type="checkbox"/> Starts at \$49.99/mo. For 36 months; 0% APR	\$1000	<input type="checkbox"/> Up to \$1000 off with trade on Magenta MAX	\$1000
	S23 Ultra	<input type="checkbox"/> Get S23 Ultra for upto \$1000 off Get twice the FREE when you pre-order any S23 device	\$1000	<input type="checkbox"/> Save today Starts at \$33.33/mo	\$800	<input type="checkbox"/> Get one \$800 off, no trade-in required Galaxy S23 series - More memory, same price	\$800
	S23 Plus	<input type="checkbox"/> Samsung Galaxy S23+ FREE Get twice the FREE when you pre-order any S23 device	\$1000	<input type="checkbox"/> Pre-order the new Samsung Galaxy S23+. And get a Watch and Tab. All on us.	\$800	<input type="checkbox"/> Galaxy S23 series - More memory, same price	\$800
	S22 Ultra	<input type="checkbox"/> \$33.34/mo	\$350	<input type="checkbox"/> Starts at \$33.33/mo. For 36 months; 0% APR	\$1000	<input type="checkbox"/> Up to \$1000 off with trade on Magenta MAX	\$1000
	S22 Plus	<input type="checkbox"/> \$22.78/mo	\$350	<input type="checkbox"/> Starts at \$27.77/mo. For 36 months; 0% APR	\$1000	<input type="checkbox"/> FREE with trade on Magenta MAX	\$1000
	Z Flip 4	<input type="checkbox"/> Samsung Galaxy Z Flip4 FREE	\$999	<input type="checkbox"/> Starts at \$27.77/mo. For 36 months; 0% APR	\$1000	<input type="checkbox"/> Up to \$1000 off with trade on Magenta MAX	\$1000
\$500- \$800	P7	\$10/ mo - No trade-in required	\$350	Get Google Pixel 7 for \$5/mo.	\$700	Get the new Google Pixel 7 FREE	\$600
	P6	\$20.56/ mo	\$350	Starts at \$27.77/mo. For 36 months; 0% APR	\$0	\$25/ mo	\$0
	i14 Plus	<input type="checkbox"/> Get it for \$0 w/ trade	\$1000	<input type="checkbox"/> Get it for \$5/mo.	\$800	<input type="checkbox"/> Get up to \$1000 off with trade and new line on Magenta MAX	\$1000
	i14	<input type="checkbox"/> iPhone 14 on us	\$1000	<input type="checkbox"/> Share the love. Buy iPhone 14, gift another on us	\$800	<input type="checkbox"/> [REDACTED]	\$1000
	i13	<input type="checkbox"/> \$10/mo - No trade-in required	\$350	<input type="checkbox"/> Now \$5/mo.	\$600	<input type="checkbox"/> Get up to \$730 off with trade and new line	\$730
	i13 mini	<input type="checkbox"/> \$17.50/mo	\$350	<input type="checkbox"/> Get it free	\$600	<input type="checkbox"/> BOGO \$700 off	\$730
	S23	<input type="checkbox"/> Get the new Galaxy S23 FREE Get twice the FREE when you pre-order any S23 device	\$800	<input type="checkbox"/> Save today Starts at \$22.22/mo	\$800	<input type="checkbox"/> Get one FREE, no trade-in required Galaxy S23 series - More memory, same price	\$800
	S22	<input type="checkbox"/> \$19.45/mo	\$350	<input type="checkbox"/> As low as \$10/mo, Online only.	\$800	<input type="checkbox"/> FREE with trade on Magenta MAX	\$1000
	S21 FE	<input type="checkbox"/> \$5/mo - No trade-in required	\$350	<input type="checkbox"/> Get Samsung Galaxy S21FE for \$10/mo.	\$0	<input type="checkbox"/> FREE with trade on Magenta MAX	\$1000
\$300 - \$500	P6a	\$2/ mo - No trade-in required	\$350	Get it free. \$0/mo	\$0	Get one FREE with new line	\$300
	iSe3	<input type="checkbox"/> \$5/ mo - No trade-in required	\$350	<input type="checkbox"/> Get it free	\$0	<input type="checkbox"/> Get up to 50% off with trade	\$400
	A53	<input type="checkbox"/> \$10/mo - No trade-in required	\$350	<input type="checkbox"/> New \$5/mo	\$0	Only \$99	\$0

The colour (refer to legend) indicates Pixel's own promo message strength compared to respective competitors being studied. Pixel model by segment: P7 in \$800+, P7 in \$500 to \$800 and P6a in \$300 to \$500 | All marketing messages in grey text indicate RP of devices where no specific marketing messages were available on key landing pages | Greyed out cell colour = n-1 models

[Link to Master Folder with all previous WBR decks | Methodology in speaker notes](#)

Marketing Messaging by carrier for key models | As of 06 Feb

Indicates that P7/Pro's MM is ☐ = At an advantage ☐ = On par ☐ = Has some gap ☐ = At a disadvantage to the resp comp model

Segment	Model	BestBuy	Apple.com	Samsung.com
\$800 - \$1000	P7 Pro	\$649.00 with activation today. Save \$250. (Unlocked)		
	P6 Pro	-		
	i14 Pro max	<input type="checkbox"/> Save upto \$1000 on iPhone 14 Series with select trade-in of your old or damaged phone and qualified activation for Verizon.	From \$1099 or \$45.79/mo. For 24 mo. before trade in	
	i14 Pro	<input type="checkbox"/> Save upto \$1000 on iPhone 14 Series with select trade-in and qualified activation. (Carrier not mentioned) <input type="checkbox"/> Save upto \$1000 on iPhone 14 Series with select trade-in of your old or damaged phone and qualified activation for Verizon.	New iPhone 14 Pro Pro. Beyond. From \$41.62/mo. for 24 mo. or \$999 before trade-in*	
	i13 Pro Max	<input type="checkbox"/> \$36.11/mo. for 36 months; 0% APR (Verizon)	-	
	i13 Pro	<input type="checkbox"/> \$38.88/mo. for 36 months; 0% APR (Verizon)	-	
	Z Fold4	<input type="checkbox"/> Save up to \$300 on Samsung Galaxy Z Series with qualified activation (Carrier not mentioned) <input type="checkbox"/> Save up to \$1000 on Samsung Galaxy Z Series with select trade-in of your old or damaged phone and qualified activation for Verizon. <input type="checkbox"/> Save up to \$800 on Samsung Galaxy Z Series with qualified activation on a Magenta Max Plan for T-Mobile and trade-in		Trade-in and save up to \$335 per device. Terms apply*
	S23 Ultra	<input type="checkbox"/> Galaxy S23 Series - Save upto \$780 with qualified trade-in, free storage upgrade and upto \$100 Best Buy Gift Card (Carrier not mentioned) <input type="checkbox"/> Save up to \$980 free storage upgrade with qualified trade-in, and upto \$100 Best Buy Gift Card (Verizon) <input type="checkbox"/> Save up to \$1000 get free storage upgrade with with qualified trade-in, and upto \$100 Best Buy Gift Card (ATT) <input type="checkbox"/> Save up to \$1180, get free storage upgrade with qualified trade-in, and upto \$100 Best Buy Gift Card (T-Mo)		Save upto \$1080 with select Galaxy S23 Ultra, get free storage upgrade, \$150 instant Samsung credit including a bonus \$50
	S23 Plus			
	S22 Ultra	<input type="checkbox"/> \$33.33/mo. for 36 months; 0% APR (Verizon)		Trade-in and save up to \$280 per device. Terms apply*
	S22+	<input type="checkbox"/> \$27.77/mo. for 36 months; 0% APR (Verizon)		Trade-in and save up to \$280 per device. Terms apply*
	Z Flip 4	<input type="checkbox"/> Save up to \$300 on Samsung Galaxy Z Series with qualified activation (Carrier not mentioned) <input type="checkbox"/> Save up to \$1000 on Samsung Galaxy Z Series with select trade-in of your old or damaged phone and qualified activation for Verizon. <input type="checkbox"/> Save up to \$800 on Samsung Galaxy Z Series with qualified activation on a Magenta Max Plan for T-Mobile and trade-in of an eligible phone		Trade-in and save up to \$350 per device. Terms apply*
\$500- \$800	P7	\$22.22/mo. for 36 months; 0% APR (Verizon)		
	P6	\$22.22/mo. for 36 months; 0% APR (Verizon)		
	i14 Plus	<input type="checkbox"/> i14 and i14 Plus. Big and Bigger. Save up to \$800 with qualified activation and trade-in (Carrier not mentioned) <input type="checkbox"/> Save upto \$1000 on iPhone 14 Series with select trade-in for Verizon.	From \$899 or \$37.45/mo.per month for 24 mo.months before trade-in	
	i14	<input type="checkbox"/> i14 and i14 Plus. Big and Bigger. Save up to \$800 with qualified activation and trade-in (Carrier not mentioned) <input type="checkbox"/> Save upto \$1000 on iPhone 14 Series with select trade-in for Verizon. <input type="checkbox"/> Save upto \$1000 on iPhone 14 Series with qualified activation and trade-in for AT&T.	iPhone 14 Big and bigger. From \$33.29/mo. for 24 mo. or \$799 before trade-in	
	i13	<input type="checkbox"/> \$22.22/mo. for 36 months; 0% APR (Verizon)	From \$699.or \$29.12/mo...for 24 mo. before.trade-in	
	i13 mini	<input type="checkbox"/> \$16.66/mo. for 36 months; 0% APR (Verizon)	From \$599 or \$2495/mo. for 2a mo. before trade -in*	
	S23	<input type="checkbox"/> Galaxy S23 Series - Save upto \$780 with qualified trade-in, free storage upgrade and upto \$100 Best Buy Gift Card (Carrier not mentioned) <input type="checkbox"/> Save up to \$980 free storage upgrade with qualified trade-in, and upto \$100 Best Buy Gift Card (Verizon) <input type="checkbox"/> Save up to \$1000 get free storage upgrade with with qualified trade-in, and upto \$100 Best Buy Gift Card (ATT) <input type="checkbox"/> Save up to \$1180, get free storage upgrade with qualified trade-in, and upto \$100 Best Buy Gift Card (T-Mo)		
	S22	<input type="checkbox"/> \$19.44/mo. for 36 months; 0% APR (Verizon)		Trade-in and save up to \$280 per device. Terms apply*
	S21 FE	<input type="checkbox"/> \$16.66/mo. for 36 months; 0% APR (Verizon)		Trade-in and save up to \$115 per device. Terms apply*
\$300 - \$500	P6a	\$249.00 with activation today. Save \$200. (Unlocked)		
	iSe3	<input type="checkbox"/> \$11.94/mo for 36 months; 0% APR (Verizon)	From \$17.87/mo. for 24 mo. or \$429 before trade-in*	
	A55	\$12.88/mo. for 36 months; 0% APR (Verizon)		Trade-in and save up to \$55 per device. Terms apply*

¹The colour (refer legend) indicates Pixel's own promo message strength as compared to respective competitor being studied. Pixel model by segment: P7 Pro in \$800+, P7 in \$500 to \$800 and P6a in \$300 to \$500 | All marketing messages in grey text in A55 RP of devices where no specific marketing messages were available on 04/28/2023. Greyed out cell colour (Verizon)

Hero Promotions - Entry Prem (\$300-\$499 MSRP)

- P6a has **stronger promotions and messaging** than competitors but **lower visibility** on key landing pages (except AT&T)
- SE3 has frequent prominence on Deals pages of VZN and A53 on T-Mo respectively
- Samsung pushes its other models such as A14 and Apple its i12 and i13 as **affordable phones (\$5/mo or less)**

	verizon			T-Mobile			AT&T		
	Us	Apple	Samsung	Us	Apple	Samsung	Us	Apple	Samsung
Device with strongest marketing msg / placement	P6a	SE3	A53	P6a	SE3	A53	P6a	SE3	A53
MSRP (base variant)	\$499	\$429	\$500	\$449	\$429	\$450	\$470	\$429	\$450
Promo messaging	Get it free	Get it free	Now \$10/mo.	Get one FREE with new line	Get up to 50% off with trade	Only \$99	Get for \$2/mo	Get it for \$5 / mo	Get it for \$12.50/ mo
Whether promo requires an NLA or applicable for Upg	NLA	NLA	NLA	NLA	Both	Both	Both	Both	Both
Whether T/I required for promo	no	no	no	no	Yes	no	no	no	no
Actual NLA TCO of device	\$0	\$1	\$180	\$0	\$83	\$450	\$72	\$180	\$293

Hero Promotions - Mid-Segment (\$500-\$799 MSRP)

- Apple has an n-1 promo strategy (i13, i13 Mini) in place, helping it **maintain competitiveness** across carriers/segments
- **S23 Series launch promos** have ensured that Samsung has highest competitiveness, except for VZN where S23 model itself hasn't achieved significant placements

	verizon✓			T-Mobile			AT&T		
	Us	Apple	Samsung	Us	Apple	Samsung	Us	Apple	Samsung
Device with strongest marketing msg / placement	Pixel 7	i13 mini	S22	Pixel 7	i14	S23	Pixel 7	i14	S23
MSRP (base variant)	\$700	\$599	\$800	\$599	\$800	\$800	\$739	\$799	\$800
Promo messaging	Get Google Pixel 7 for \$5/mo.	Get it free	As low as \$10/mo	Get the new Google Pixel 7 FREE	Get 4 i14 ON US and 4 lines for \$25/line	Get one FREE, no trade-in required	\$10/ mo - No trade-in required	i14 on us	Get the new Galaxy S23 FREE
Whether promo requires an NLA or applicable for Upg	NLA	NLA	NLA	Both	NLA	Both	Both	Both	Both
Whether T/I required for promo	No	No	No	Yes	Yes	Yes	No	Yes	Yes
Actual NLA TCO of device	\$180	\$1	\$460	\$57	\$37	\$0	\$359	\$61	\$0

Hero Promotions - Premium-Segment (\$800-\$999 MSRP)

- On VZN, Apple continues to have **stronger TI** even post S23 announce, with two tiers - \$1000 and \$800 on i14 Pro/Pro Max. S23 series has guaranteed TI of \$800 across all devices. P7 Pro has **limited/no visibility** despite having lowest TCO
- On T-Mo, **S23 Ultra** has stronger placements than S23 Plus

	verizon✓			T-Mobile			AT&T		
	Us	Apple	Samsung	Us	Apple	Samsung	Us	Apple	Samsung
Device with strongest marketing msg / placement	Pixel 7 Pro	i14 Pro	S23 Plus	Pixel 7 Pro	i14 Pro	S23 Ultra	Pixel 7 Pro	i14 Pro	S23 Plus
MSRP (base variant)	\$900	\$999	\$999	\$899	\$999	\$1119	\$940	\$999	\$999
Promo messaging	Starts at \$24.99/mo. For 36 months; 0% APR	Apple Watch SE bundle highlighted	S23 Plus bundle (Watch + Tab)	Save up to \$600 with trade on MAX	i14 Pro. Get one ON US	Get one \$800 off, no trade-in required	Get this FREE w/ trade	i14 Pro on us (w/ T/I)	Samsung Galaxy S23+ FREE
Whether promo requires an NLA or applicable for Upg	NLA	NLA	Both	Both	NLA	Both	Both	Both	Both
Whether T/I required for promo	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Actual NLA TCO of device	\$95	\$145	\$320	\$357	\$237	\$399	\$0	\$261	\$120



Business Overview