



# Consumer Marketing Messaging | Key Models

**Marketing Messaging by carrier for key models | As of 23 Jan** ■ = Advantage ■ = On par ■ = some gap ■ = Disadvantage | Indicates Pixel's promo message strength v/s competition¹

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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	Up to \$800 off w/ trade	\$800	Get Google Pixel Watch for free, when you buy Google Pixel 7 Pro.	\$900	Save up to \$600 on P7 Pro	\$600
	P6 Pro	\$26.12/ mo	\$350	Save \$300. Online only.	\$0	Unavailable	-
	i14 Pro max	Up to \$1000 off w/ Trade	\$1000	Trade-in and save, plus gift on us.	\$1000	Ready to ship: i14 Pro and i14 Pro Max/ Get up to \$800 off with trade when you add a new line	\$800
	i14 Pro	i14 Pro on us	\$1000	Amazing together. Get Apple watch Series 7, on us.	\$1000	Ready to ship: i14 Pro and i14 Pro Max/ Get up to \$800 off with trade when you add a new line	\$800
	i13 Pro Max	\$30/mo - No trade-in required	\$350	Now \$10/ mo. Online only.	\$600	Unavailable	\$730
	i13 Pro	\$25/mo - No trade-in required	\$350	Now \$5/ mo. Online only.	\$600	Get up to \$730 off with trade and new line	\$730
	Z Fold4	Up to \$800 off w/ Trade	\$800	Trade-in and save, plus gift on us.	\$1000	Get up to \$800 off a Flip4 or Fold4	\$400
	S22 Ultra	Up to \$800 off w/ Trade	\$800	Trade-in and save, plus gift on us.	\$1000	Get up to \$800 off with new line on Magenta MAX	\$400
	S22+	Up to \$800 off w/ Trade	\$800	Get Samsung Galaxy watch5 for free, when you buy S22+	\$1000	Up to \$800 off with new line on Magenta MAX	\$400
	Z Flip 4	Up to \$800 off w/ Trade	\$800	Trade-in and save, plus gift on us.	\$1000	Get up to \$800 off a Flip4 or Fold4	\$400
\$500- \$800	P7	Google Pixel 7 for \$10/ mo	\$350	Get Google Pixel 7 for \$5/mo.	\$700	Get the new Google Pixel 7 FREE	\$600
	P6	\$20.56/ mo	\$350	(marketing message absent)	\$0	\$25/ mo	\$0
	i14 Plus	Get it for \$0 w/ trade	\$1000	iPhone 14 Plus. Now that's big. Get it for \$5/mo.	\$800	Get up to \$800 off with trade in when you add a new line	\$800
	i14	iPhone 14 on us	\$1000	Trade-in and save, plus gift on us.	\$800		\$800
	i13	\$5/mo - No trade-in required	\$350	Get iPhone 13,On us. An all-out standout. Online only.	\$600	Get up to \$730 off with trade and new line	\$730
	i13 mini	\$17.50/mo	\$350	Get it free	\$600	BOGO \$700 off	\$730
	S22	Samsung Galaxy S22 FREE!	\$800	Trade-in and save, plus gift on us	\$800	Get one FREE	\$400
	S21 FE	\$5/mo - No trade-in required	\$350	Get Samsung Galaxy S21FE for \$10/mo.	\$0	Up to \$800 off with new line on Magenta MAX	\$400
\$300 - \$500	P6a	\$2/ mo - No trade-in required	\$350	Get it free.	\$0	Get one ON US with new line	\$300
	iSe3	\$5/ mo - No trade-in required	\$350	Get it free	\$0	Get up to \$400 with trade on eligible plans including Magenta and Magenta MAX	\$400
	A53	\$12.50/ mo	\$350	Get Samsung Galaxy A53 5G, on us	\$0	Only \$99	\$0

<sup>1</sup>The 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 indicate RP of devices where no specific marketing messages were available on key landing pages

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

Marketing Messaging by carrier for key models | As of 23 Jan 2025

🟢 = Advantage   = On par   🟡 = some gap   🟠 = Disadvantage | Indicates Pixel's promo message strength v/s competition<sup>1</sup>

Segment	Model	BestBuy	Apple.com	Samsung.com
\$800 - \$1000	P7 Pro	\$749.00 with activation today. Save \$100. (Unlocked)   Save up to \$900 on Pixel 7 Series with TI (VZN), Save up to \$600 on P7/P7 Pro with TI (T-Mo)		
	P6 Pro	\$539.99 with activation today. Save \$359.01 (Unlocked)		
	i14 Pro max	<div><div></div>Save upto \$1100 on iPhone 14 Series with select trade-in of your old or damaged phone and qualified activation for Verizon.</div> <div><div></div>Save upto \$1000 on iPhone 14 Series with qualified activation and trade-in for AT&amp;T.</div> <div><div></div>Save upto \$800 on iPhone 14 Series with qualified activation and trade-in for T-Mobile.</div>	From \$1099 or \$45.79/mo. For 24 mo. before trade in	
	i14 Pro	<div><div></div>Save upto \$1100 on iPhone 14 Series with select trade-in of your old or damaged phone and qualified activation for Verizon.</div> <div><div></div>Save upto \$1000 on iPhone 14 Series with qualified activation and trade-in for AT&amp;T.</div> <div><div></div>Save upto \$800 on iPhone 14 Series with qualified activation and trade-in for T-Mobile.</div>	New   iPhone 14 Pro   Pro. Beyond. From \$41.62/mo. for 24 mo. or \$999 before trade-in*	
	i13 Pro Max	<div><div></div>(BOGO) iPhone 13/ iPhone 14 Series Buy 1, save up to \$700 on 2nd with qualified activation and monthly payment plan (T-Mobile).</div>	-	
	i13 Pro	<div><div></div>(BOGO) iPhone 13/ iPhone 14 Series Buy 1, save up to \$700 on 2nd with qualified activation and monthly payment plan (T-Mobile).</div>	-	
	Z Fold4	<div><div></div>Save up to \$1400 on Samsung Galaxy S22 Series with select trade-in of your old or damaged phone and qualified activation for Verizon.</div> <div><div></div>Save up to \$800 on Samsung Galaxy S22 Series with qualified activation on a Magenta Max Plan for T-Mobile and trade-in</div>		Flex on all the other with Galaxy Z Fold4
	S22 Ultra	<div><div></div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$250 without trade-in. (Verizon)</div> <div><div></div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$200 without trade-in. (AT&amp;T)</div> <div><div></div>Save up to \$800 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$250 without trade-in. (T-Mobile)</div>		Get \$200 off select device
	S22+	<div><div></div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$250 without trade-in. (Verizon)</div> <div><div></div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$200 without trade-in. (AT&amp;T)</div> <div><div></div>Save up to \$800 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$250 without trade-in. (T-Mobile)</div>		Get up to \$150 off. Plus, get up to \$185 instant trade-in credit.
	Z Flip 4	<div><div></div>Save up to \$1400 on Samsung Galaxy S22 Series with select trade-in of your old or damaged phone and qualified activation for Verizon.</div> <div><div></div>Save up to \$800 on Samsung Galaxy S22 Series with qualified activation on a Magenta Max Plan for T-Mobile and trade-in of an eligible phone</div>		Get \$50 instant Samsung credit
(\$500- \$800	P7	\$499.00 with activation today. Save \$100. (Unlocked)   Save up to \$900 on Pixel 7 Series with TI (VZN), Save up to \$600 on P7/P7 Pro with TI (T-Mo)		
	P6	\$279.99 with activation today. Save \$419.0 (Unlocked)		
	i14 Plus	<div><div></div>i14 and i14 Plus. Big and Bigger. Save up to \$800 with qualified activation and trade-in (Carrier not mentioned)</div> <div><div></div>Save upto \$1000 on iPhone 14 Series with select trade-in for Verizon.</div> <div><div></div>Save upto \$1000 on iPhone 14 Series with qualified activation and trade-in for AT&amp;T.</div> <div><div></div>Save upto \$800 on iPhone 14 Series with qualified activation and trade-in for T-Mobile.</div>	From \$899 or \$37.45/mo.per month for 24 mo.months before trade-in	
	i14	<div><div></div>i14 and i14 Plus. Big and Bigger. Save up to \$800 with qualified activation and trade-in</div> <div><div></div>Save upto \$1000 on iPhone 14 Series with select trade-in for Verizon.</div> <div><div></div>Save upto \$1000 on iPhone 14 Series with qualified activation and trade-in for AT&amp;T.</div> <div><div></div>Save upto \$800 on iPhone 14 Series with qualified activation and trade-in for T-Mobile.</div>	iPhone 14   Big and bigger.  From \$33.29/mo. for 24 mo. or \$799 before trade-in*	
	i13	<div><div></div>Select iPhone 13 Save up to \$600 with trade-in of your own or damaged phone and qualified activation for Verizon.</div> <div><div></div>iPhone 13/ iPhone 14 Series Buy 1, save up to \$700 on 2nd with qualified activation and monthly payment plan (T-Mobile).</div>	From \$699.or \$29.12/mo..for 24 mo. before.trade-in	
	i13 mini	<div><div></div>(BOGO) iPhone 13/ iPhone 14 Series Buy 1, save up to \$700 on 2nd with qualified activation and monthly payment plan (T-Mobile).</div>	From \$599  or \$2495/mo.  for 2a mo. before  trade-in*	
	S22	<div><div></div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$250 without trade-in. (Verizon)</div> <div><div></div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$200 without trade-in. (AT&amp;T)</div> <div><div></div>Save up to \$800 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$250 without trade-in. (T-Mobile)</div>		Get up to \$150 off. Plus, get up to \$185 instant trade-in credit.
	S21 FE	\$549.99 with activation today. Save \$150 (Unlocked)		From \$584.99 \$699.99 with eligible trade-in@ \$24.38/mo \$29.17/mo for 24 mo@ with Samsung Financing
\$300 - \$500	P6a	\$349.00 with activation today. Save \$100. (Unlocked)		
	iSe3	\$11.95/mo for 36 months; 0% APR (AT&T)	iPhone SE  Love the power.  Love the price.  From \$17.87/mo. for 24 mo. or \$429 before trade-in*	Verizon, 128 GB. From \$419.99 \$499.99 with eligible trade-in@ \$17.51/mo \$20.84/mo for 24 mo@ with Samsung Financing

<sup>1</sup>The 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. The RP of devices where no specific marketing messages were available is \$499 with activation today. Save \$100. Was \$449

Link to Master Folder with all previous WBR decks | Methodology in speaker notes

Highlights

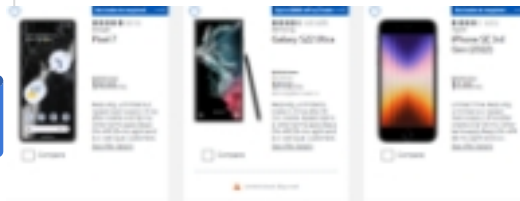
- The marketing messaging strength for P7 Pro stands mostly at an advantage on Verizon, strong disadvantage on T-Mobile and is on par for AT&T.
- Apple i13 Pro Max has been made unavailable on T-Mobile.

Opportunities for Pixel

- P7 Pro and P7 are either at an advantage or on par when compared to the i14 series on Verizon. Similar marketing messaging strategies can be expanded to AT&T and T-Mobile; both of which stand at a disadvantage for the same.



- Hero device: i14 Pro continues to be the Hero Device with top placements on landing pages, with strong promo messaging (On Us/ Up to \$1000 off with eligible trade-in).
- The carrier website is promoting Galaxy S22 Ultra on the Phones & Devices page with a new FOMO strategy marketing message - *Limited Stock. Buy now!* This is also the only phone model on this page with the above mentioned marketing



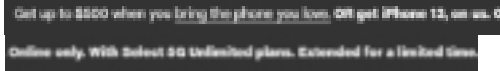
- Google P6 Pro is being promoted in the third-fold of the Phones & Devices page



- i14 Pro, S22+ & P7 Pro continues to dominate all top placements on all landing pages with strong marketing messages advertising their bundle offers. Only the Homepage is missing Pixel advertisement where as S22+ and i14 Pro offers are still highlighted.



- iPhone 13 is being pushed on vzn in a unique way by using a tickertape placement on the main homepage which gives it max visibility while also decreasing the overall cost of placement.



- Hero Device: i14 continues to dominate the carrier website with multiple top placements across all landing pages with strong promo messaging - *ON US*.



- The carrier website is promoting i14 Pro and i14 Pro Max on the landing page and Deals page with a new messaging strategy - *Ready to ship: i14 Pro and i14 Pro Max. Shop now.*



- Google Pixel messaging strength is significantly weaker on this carrier website.

Highlights

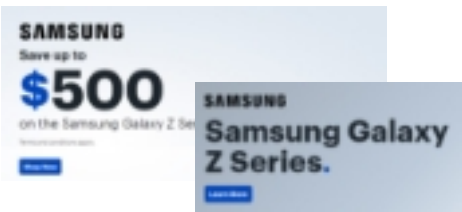
- On the BestBuy's ongoing sales page, S22 series is the only series highlighted in the featured deals section. Followed by a separate section for Apple products. Pixel, meanwhile, can only be seen in the Cell Phones section (beyond 5th fold).

Opportunities for Pixel

- Limited promos (TI/Non-TI) available for Pixel 'n-1' series across retailers except AT&T (with trade-in upto \$350), BBY ATT (with unique discount of \$500 on P6 Pro) & BBY UN (with unique discount of \$419 on P6), unlike with Apple's i13 series



- Samsung is promoting its Z-series twice in the first fold of Phones page with a discount promo message on the first banner - *Save up to \$500 on the Samsung Galaxy Z-series with qualified activation.*



- Samsung has made another section for promoting its Unpacked Event on Phones page with the promo message - *Epic Zoom. The latest from Samsung Galaxy is coming February 1.*



Epic zoom. The latest from Samsung Galaxy is coming February 1.



Apple.com (1P)

- Apple is actively advertising their newly launched MacBook Pro and Mac mini which are supercharged by their M2 Pro and M2 Max on their Homepage with Top placement.



- Apple can be seen promoting their 14 series and SE3 more than their n-1 series, possibly to attract customers who can afford to pay lump sum towards their newly launched devices and vice versa for SE3.



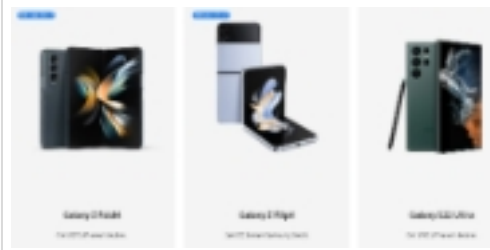
SAMSUNG

Samsung.com (1P)

- Hero Device: Samsung is now promoting its Z Fold4 on the landing page with top banner placement and a limited offer promo message - *Offer ends Feb. 5.*



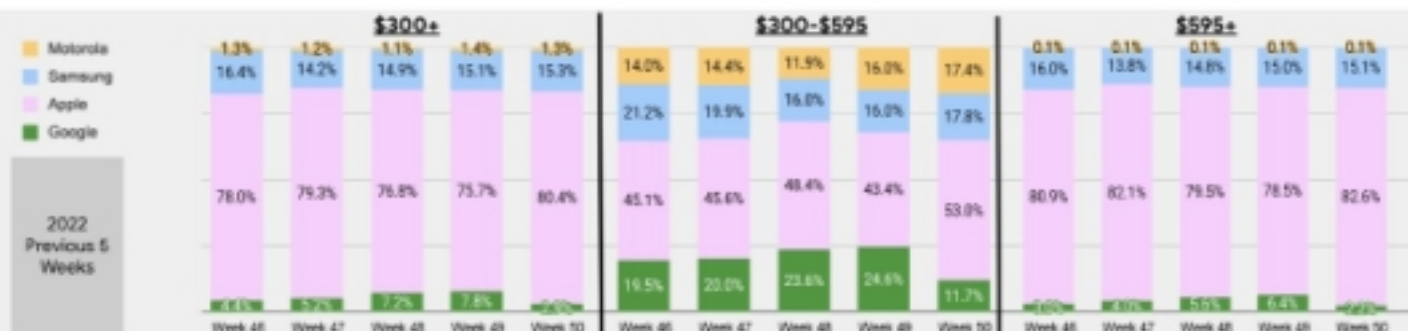
- Under the 'Smartphones & Wearables' section, Z Flip4 has a weaker messaging strength when compared to Z Fold4 and S22 Ultra, which are being promoted with a discount offer of up to \$225 and \$200 respectively.





# Pixel weekly market share trends

## US Segment Share - Week 47 (wk of Nov-13-22) to Week 50 (wk of Dec-04-22)



Google	2022	4.4%	5.2%	7.2%	7.8%	2.9%	19.5%	20.0%	23.6%	24.6%	11.7%	3.0%	4.0%	5.6%	6.4%	2.2%
	2021	5.7%	5.4%	3.6%	6.3%	3.8%	3.5%	8.5%	9.0%	21.2%	4.1%	5.2%	5.1%	3.1%	4.8%	3.8%
	YoY	-14%	-3%	101%	24%	-24%	455%	134%	164%	16%	186%	-42%	-22%	79%	33%	-41%
Apple	2022	78.0%	79.3%	76.8%	75.7%	80.4%	45.1%	45.6%	48.4%	43.4%	53.0%	80.9%	82.1%	79.5%	78.5%	82.6%
	2021	84.0%	80.2%	83.2%	77.7%	80.4%	78.2%	64.8%	66.4%	54.1%	66.6%	84.6%	81.6%	84.6%	80.2%	81.8%
	YoY	-7%	-1%	-8%	-3%	0%	-42%	-30%	-27%	-20%	-20%	-4%	1%	-6%	-2%	1%
Samsung	2022	16.4%	14.2%	14.9%	15.1%	15.3%	21.2%	19.9%	16.0%	16.0%	17.8%	16.0%	13.8%	14.8%	15.0%	15.1%
	2021	10.3%	13.4%	12.6%	14.7%	14.7%	13.2%	17.6%	18.1%	14.7%	20.3%	10.1%	13.0%	12.1%	14.7%	14.1%
	YoY	59%	6%	18%	2%	4%	61%	13%	-10%	9%	-12%	59%	6%	22%	2%	7%
TAM	2022	1.86M	2.21M	2.81M	2.26M	2.34M	151.2K	170.6K	248.9K	182.4K	167.8K	1.71M	2.04M	2.56M	2.08M	2.17M
	2021	1.76M	1.51M	2.64M	1.57M	1.91M	150.9K	128.9K	205.9K	146.6K	176.2K	1.61M	1.38M	2.44M	1.42M	1.74M
	YoY	5%	47%	6%	45%	22%	1%	32%	21%	24%	-5%	6%	48%	5%	47%	25%

Refreshed by Monday EOD -  
[go/PixelWeeklyMS](#) -

[Dashboard](#) update Pending

Source: Counterpoint data for  
 non-Pixel and Pixel actual SO  
2022 | Confidential and Proprietary | Google

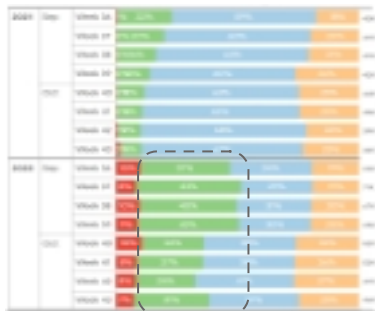
# Current market overview | \$300-\$499 MSRP

Verizon

T-Mobile

AT&T

## Market share trends



Apple (SE phones) gained by over 20% in this segment on VZN



SS grew by gained by over 60% in this segment on T-Mo, potentially owing to A series success



Apple gained by over 60% in this segment in Sep 2022, potentially owing to i14 series success, while Sep 2021 being launch month did not see much growth

## Hero promotions | \$300-\$499

	Us	Apple	Samsung
Device	P6a	SE 3rd gen	A53
MSRP	\$499	\$429	\$500
Mkt message	Get it free	Get it free	Get Samsung Galaxy A53 5G, on us
NLA/Upg?	NLA	NLA	NLA
T/I required	no	no	no
NLA TCO	\$0	\$1	\$180

	Us	Apple	Samsung
Device	P6a	SE 3rd gen	A53
MSRP	\$449	\$429	\$450
Mkt message	On Us with Newline	Get up to \$400 with trade on eligible plans including Magenta and MAX	Only \$99
NLA/Upg?	NLA	Both	Both
T/I required	no	Yes	no
NLA TCO	\$0	\$83	\$450

	Us	Apple	Samsung
Device	P6a	SE 3rd gen	A53
MSRP	\$470	\$429	\$450
Mkt message	Get for \$2/mo	Get it for \$5 / mo	Get it for 12.50/ mo
NLA/Upg?	Both	Both	Both
T/I required	no	no	no
NLA TCO	\$72	\$180	\$296



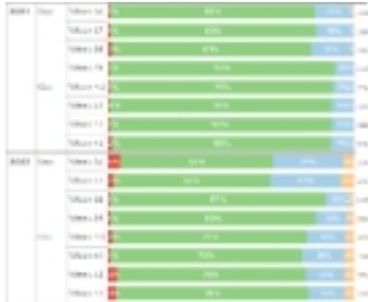
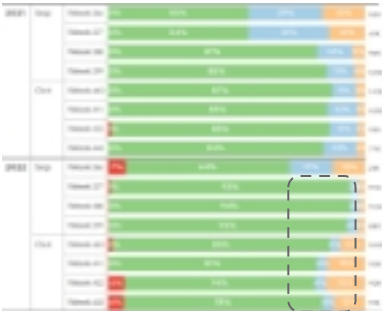
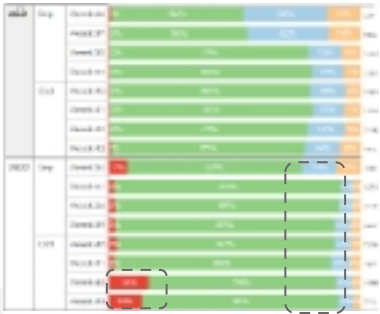
# Current market overview | \$500-\$799 MSRP

## Verizon

## T-Mobile

## AT&T

### Market share trends



Pixel share grew by 14% post Oct 20, cause unknown

Samsung saw a spike in Week 37 (14% growth YoY) and maintained 8-9% higher market share in Oct

### Hero promotions | \$500-\$799

	Us	Apple	Samsung
Device	Pixel 7	i13 mini	S22
MSRP	\$700	\$599	\$800
Mkt message	Get Google Pixel 7 for \$5/mo.	Get it free	Trade-in and save, plus gift ON US
NLA/Upg?	NLA	NLA	Both
T/I required	No	No	Yes
NLA TCO	\$180	\$1	\$46

GOOGLE APPLE SAMSUNG OTHER

Please find detailed methodology in speaker notes

	Us	Apple	Samsung
Device	Pixel 7	i14	S22
MSRP	\$599	\$800	\$800
Mkt message	Google Pixel 7 FREE	Get i14 ON US and 4 lines for \$25/line/ Apple iPhone 14. Get one ON US	Get one FREE
NLA/Upg?	Both	NLA	NLA
T/I required	Yes	Yes	No
NLA TCO	\$57	\$91	\$0

GOOGLE APPLE SAMSUNG OTHER

	Us	Apple	Samsung
Device	Pixel 7	i14	S22
MSRP	\$739	\$799	\$800
Mkt message	Google Pixel 7 for \$10/ mo	i14 on us	Get this Phone for FREE
NLA/Upg?	Both	Both	Both
T/I required	No	Yes	Yes
NLA TCO	\$359	\$87	\$60

GOOGLE APPLE SAMSUNG OTHER

# Current market overview | \$800-\$999 MSRP

Verizon

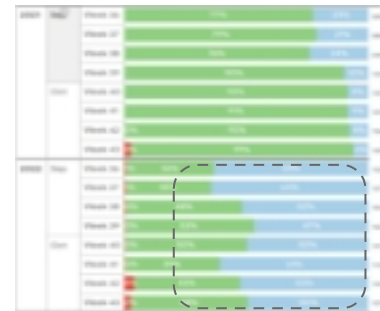
T-Mobile

AT&T

## Market share trends



Upto 50% higher market share of Samsung in the premium segment across carriers, suggesting strong success of Z Series and / or S22 premium models



Pixel share grew by 12% post Oct 20

## Hero promotions | \$800-\$999

	Us	Apple	Samsung
Device	Pixel 7 Pro	i14 Pro	Flip 4
MSRP	\$900	\$999	\$1000
Mkt message	Get Google Pixel Watch for free, when you buy P7 Pro.*	Amazing together. Get Apple watch Series 7, on us.	Trade-in and save, plus gift on us.
NLA/Upg?	NLA	NLA	NLA
T/I required	Yes	Yes	Yes
NLA TCO	\$95	\$145	\$146

	Us	Apple	Samsung
Device	Pixel 7 Pro	i14 Pro	Flip4
MSRP	\$899	\$999	\$999
Mkt message	Save up to \$600 with trade on MAX	Get up to \$800 off with trade when you add a new line	Get up to \$800 off a Flip4 or Fold4
NLA/Upg?	Both	NLA	NLA
T/I required	Yes	Yes	No
NLA TCO	\$357	\$291	\$199

	Us	Apple	Samsung
Device	Pixel 7 Pro	i14 Pro	Flip4
MSRP	\$940	\$999	\$999
Mkt message	Up to \$800 off w/ trade	i14 Pro on us (w/ T/I)	Up to \$800 off w/ Trade
NLA/Upg?	Both	Both	Both
T/I required	Yes	Yes	Yes
NLA TCO	\$200	\$287	\$260

Please find detailed methodology in speaker notes

\*: Best offer is considered for devices with marketing messages highlighting only the bundle offers

GOOGLE

APPLE

SAMSUNG

OTHER