



# Business Overview

## Exec Summary

### S23 achieves highest visibility across carriers and platforms

Samsung had the highest prominence during 5 to 11 Feb, ahead of the launch, displacing Apple even on iOS devices (esp. AT&T)

### Study success / sales growth on BestBuy W6

- WoW Partner traffic growth especially on BBY was driven by Google (140% ↑ WoW PDP visits), owing to P6a and P7 Pro
- Pixel saw strong consolidated sales growth on BBY (85% ↑) post 3W of decline
- This was achieved with a considerable SoT growth (18.5% ↑)

#### Takeaways/Next Steps

Monitor placements during competitor launches to negotiate and plan ahead ahead for Pixel NPIs

#### PoC

> Explore traffic acquisition channels responsible for traffic growth in BBY models (direct and organic) and benchmark effectiveness for sales

> Replicate success across carriers

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Samsung continued to have strong visibility with key home page placements especially on T-Mo and BBY. Pixel's SoT grew by ~19% on BBY, driven by **strong traffic growth on P7 Pro & P6a**. Samsung's promos improved across all BestBuy carriers

Sales

Total WwW

Pixel 7

9,445

-4%

Total WwW

Pixel 7 Pro

8,885

-4%

Sales

WwW

VZN

TMO

AT&T

BB

5,084

5,208

3,640

4,392

Δ-35%

Δ-9%

Δ3%

Δ85%

TAM

As of Feb 3

102K

Δ-5%

1.4M

Δ-5%

Mkt Share

As of Feb 3

11.9%

Δ 0.6%

2.7%

Δ -0.4%

Traffic

VZN

TMO

AT&T

BB

12.3M

47.4M

39.6M

25.1M

Δ-132.8K

Δ-1.4M

Δ455.2K

Δ1.7M

Total Partner Traffic

VZN

TMO

AT&T

BB

22.7K

19.8K

9.4K

109.3K

Δ-700.6

Δ-2.0K

Δ1.2K

Δ63.8K

Google PDP Traffic

VZN

TMO

AT&T

BB

Δ.9%

73%

4.4%

34.1%

Δ0.4%

Δ0.7%

Δ0.4%

Δ18.7%

Google Share of Traffic

VZN

TMO

AT&T

BB

Δ.9%

73%

4.4%

34.1%

Δ0.4%

Δ0.7%

Δ0.4%

Δ18.7%

Placements

VZN

TMO

AT&T

BB

14 / 5

26 / 14

14 / 0

29 / 2

Android vs. Apple

VZN

TMO

AT&T

BB

0 / 14

0 / 26

0 / 1

0 / 29

Google vs. Samsung

VZN

TMO

AT&T

BB

4%

1%

5%

8%

Δ 0.5%

Δ-0.1%

Δ-2.5%

Δ 0.1%

Google Share of Prominence

VZN

TMO

AT&T

BB

4%

1%

5%

8%

Δ 0.5%

Δ-0.1%

Δ-2.5%

Δ 0.1%

Availability

VZN

TMO

AT&T

BB

100%

100%

75%

91%

< 2 Days

VZN

TMO

AT&T

BB

100%

100%

75%

91%

Total P7+Pro sales 1 WoW. Strong growth on BBY (85%↑) post fall for [redacted]. [redacted] highest lowest

VZN, TMO 1 Google saw higher 1 than SS & Apple

BBY 18% growth owing to P7 Pro & P6a (upto 135%↑) mainly owing to direct and organic

S23 series maintained top placements (100% Android share), also leading to Pixel SoBP 1 on AT&T. Apple's strongest prominence is on T-Mo

113 Pro variant availability on AT&T and T-Mo

1

1

Carriers with WoW Δ

Verizon

Other carriers

P7 Pro

P6 Pro

i14 Pro/Max

S23 Ultra/+

S22 Ultra/+

Z Flip/Fold4

P7

i13/Mini

\$330 bundle ↓

\$400 BOGO on upg 1

\$400 BOGO on upg 1

TI extended for NL All Unltd

TI removed X

\$400 BOGO on upg

\$330 bundle ↓

\$520 uniq disc. All Unltd ↑

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-

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BBY VZN, AT&T & T-Mo - \$100-\$200 1 uniq disc

Fold4 - BBY VZN & T-Mo: \$300 & 400 1 uniq disc \$150 ↑

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Uniq Disc \$150 ↑ AMZN

Watch5 Pro bundle X SS.com

-

-

Uniq Disc \$75 ↑ AMZN

-

-

Promotional Landscape

Models with WoW Δ

Verizon

T-Mobile

Best Buy














































P7 Pro has an opportunity to gain competitive edge over Samsung through strong promo messaging, with n-1 models (S22 Ultra / Plus) TI offers being taken off

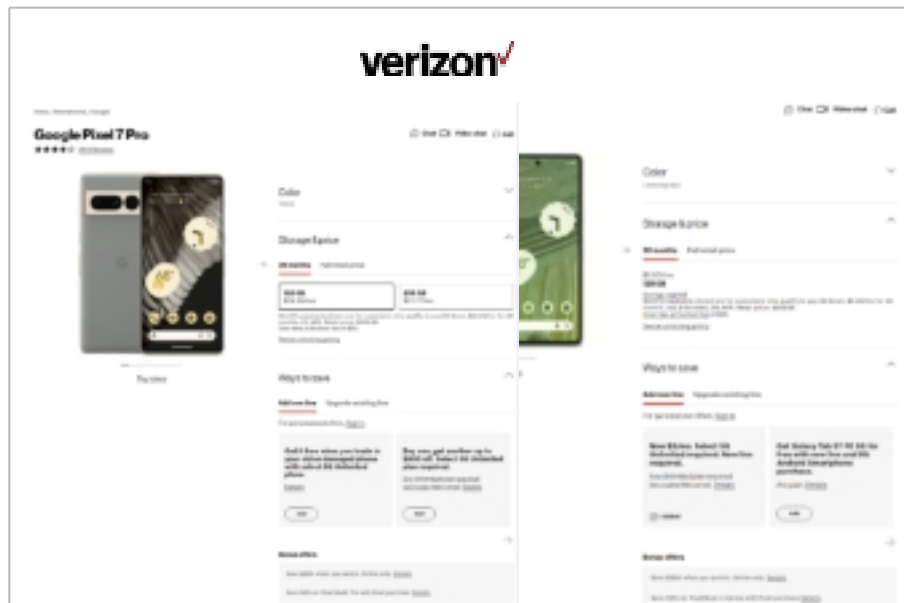
VZN has strong discounts on Apple's mid-segment (i14 Plus, i14, i13 Mini, i13) with 70-100% discount on MSRP on these models

T-Mo has strongest overall promos across carriers

T-Mo's has a strong promo focus on Samsung prem-models, with S23 and S22 Ultra/Plus, Flip 3 and Flip 4 discounted upto 60-90% of MSRP

Samsung's promos across models (including S21 FE & A53) strengthened on BBY carriers, with launch/1 of disc. upto \$100-\$400

US	Pixel <input type="checkbox"/> Apple <input type="checkbox"/> Samsung <input type="checkbox"/> Non-branded banners <input type="checkbox"/>				
	Partner	Pixel 7/7 Pro offer	Home Page	Deal Page	Category Page
	<a href="#">Verizon</a>	Starts at \$24.99/mo. for 36 mos ( <i>Listings page only</i> ) (\$200 Switch + \$400 BOGO + Upto \$900 NLA TI / \$800 Upg TI)  Get Pixel 7 for \$5/mo ( <i>Deals + Category pages</i> ) (\$200 Switch + \$520 Discount + Upto \$700 Upg TI)	  	  	  
	<a href="#">AT&amp;T</a>	Get the Google Pixel 7 Pro free with T/I ( <i>Listings page only</i> ) (Guaranteed TI \$939)  P7 at \$10/mo, no trade-in required ( <i>Deals Page</i> ) (\$300 Discount + Upto \$280 AT&T Promotional cards on TI)	  	  	  
	<a href="#">T-Mobile</a>	Get the Pixel 7 Pro for \$399 ( <i>Deals Page</i> ) (\$500 Discount + Upto \$600 TI)  Get the Pixel 7 for \$99 ( <i>Deals Page</i> ) (\$500 Discount + Upto \$600 TI)	  	  	  
	<a href="#">Best Buy</a>	Save \$100 or \$150 on Unlocked Pixel 7 family cell phones ( <i>Top Deals &gt; Cell Phones page</i> ) P7 Pro: Upto \$900 TI BBY VZN, \$600 TI BBY T-Mo P7: Upto \$700 Upg TI BBY VZN, Upto \$600 TI BBY T-Mo	  	  	  
	<a href="#">Amazon</a>	P7 Pro: \$150 off on listing price, P7: \$100 off on listing price	  	  	  



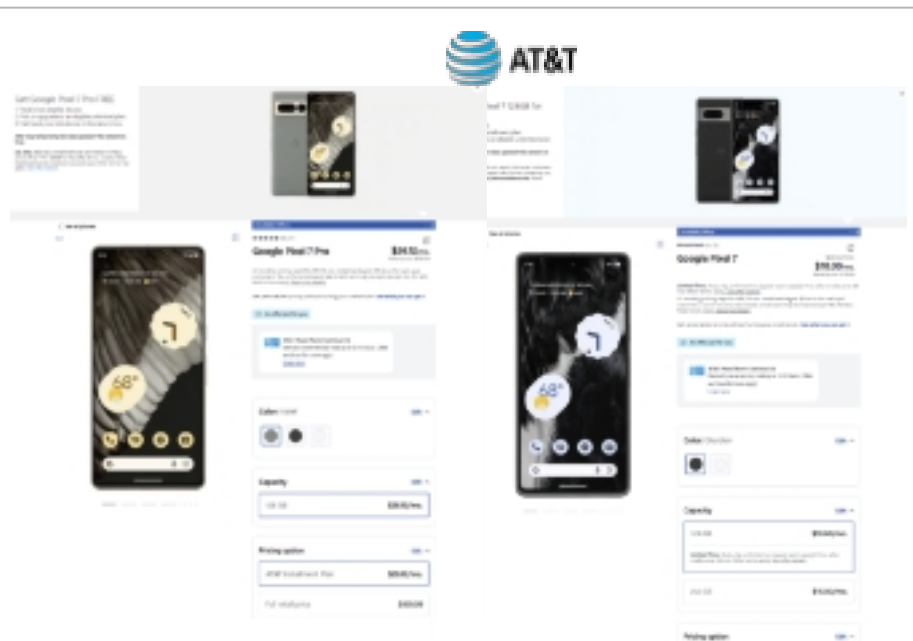
The image shows the Verizon website for the Google Pixel 7 Pro. The left side displays the phone's features, including its camera and design. The right side shows two pricing options: 'Pixel 7 Pro' and 'Pixel 7'. The 'Pixel 7 Pro' option is highlighted with a blue background. The 'Pixel 7' option is also visible below it.

P7 Pro

P7

\$200 NL Switch (Both Plans) +  
\$400 BOGO NLA & UPG + Upto  
\$900 NLA TI + Upto \$800 UPG TI  
(Select Unltd Plans)

\$200 NL Switch + \$520 Unique  
Discount NLA (Both Plans) +  
Upto \$700 UPG TI (Select Unltd)



The image shows the AT&T website for the Google Pixel 7 Pro. The left side displays the phone's features, including its camera and design. The right side shows two pricing options: 'Pixel 7 Pro' and 'Pixel 7'. The 'Pixel 7 Pro' option is highlighted with a blue background. The 'Pixel 7' option is also visible below it.


P7 Pro

P7

Guaranteed \$939 NLA & UPG TI  
(FREE)

\$380 Unique Discount (\$10/mo)

**T-Mobile**



The screenshot shows two columns of offers for T-Mobile smartphones. The left column is for the P7 Pro and the right column is for the P7. Each column lists several offers with details on discounts and activation requirements.

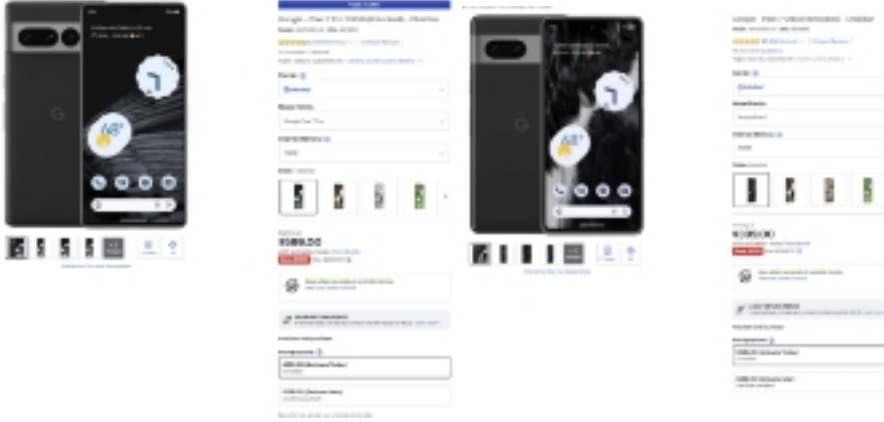
**P7 Pro**

**P7**

**MM: Upto \$600 off on TI**  
**Mainstream: Upto \$300 off on TI**  
**Both: \$501 NLA Unique Discount**

**MM: Upto \$600 off on TI**  
**Mainstream: Upto \$300 off on TI**  
**Both: \$501 NLA Unique Discount**

**BEST BUY**



The screenshot shows two columns of offers for Best Buy smartphones. The left column is for the P7 Pro and the right column is for the P7. Each column lists several offers with details on discounts and activation requirements.

**P7 Pro**

**P7**

**\$300 Unique Discount (\$599 Activate Today / \$749 Activate Later)**

**\$200 Unique Discount (\$399 Activate Today / \$499 Activate Later)**

## Highlights

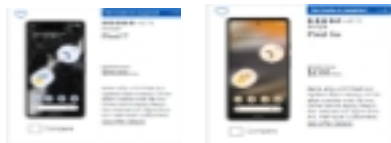
The Galaxy S23 series seems to have shifted its focus on AT&T from S23 Ultra to S23. However, Verizon and T-Mobile continue to promote S23+, this is in line with growth in popularity and TAM of mid-segment phones over last few weeks

AT&T as a carrier is increasingly seen indulging in 'scarcity' marketing with offer countdown banners seen for both i14 Pro and the S23 in Week of 13 Feb

Samsung S23 placements on BBY are significantly better than previous Z4 launches, with dedicated [homepage banners](#) seen 1W post-announce and [dedicated homepage folds](#) 2W post-announce



P7 and P6a beyond 3F on Deals and Phone Deals pages 'under \$10/mo and \$5/mo' phones. Opportunity to negotiate 1F and 2F placements with stronger messaging of 'FREE' / 'ON US', similar to S23 and i14 series



- Hero device: Shift in focus from S23 Ultra to S23 on the home page, while S23 Ultra and S23+ are featured on the Deals page.



- Model-wise visibility on AT&T's pages: S23 > S23 Ultra > i14 Pro > i14 / S23+ > Flip 4
- AT&T has increasingly been dedicating ~50% of its home and deals pages to its own carrier offerings as Unlimited Data Plans, Internet, Direct Stream, AT&T brand power accessories, signifying strategic focus



While P7 was listed on the Deals page, no visibility for P7 Pro TI (upto \$900), present only on listings page bottom fold. Opportunity to negotiate for better placement on Deals/Phone Deals pages

- Hero Device: S23+ across landing pages. All S22 series banners taken off, new bundles launched 'Pre-order the new Samsung Galaxy S23+. And get a Watch and a Tab. All on us' plus 512GB for the price of 256GB'



- Apple continues to hold a spot on the Homepage and the Deals page with strong marketing messages for their i14 and i14 Pro.



Shift in Pixel marketing messaging:

- > P7 Pro: From 'Save up to \$600' to Get P7 Pro for \$399 (Evaluate impact of change)
- > P7: 'Get the new Google Pixel 7 FREE' to P7 for \$99 (Fall in marketing strength)
- Hero Device: S23+, strong placements for i14 Pro and i14 on the second-fold of the landing page and Deals page



- 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



BestBuy homepage folds (Pixel opportunities):

- > Samsung NPI - BBY's homepage had a dedicated fold highlighting the S23 series devices and laptops (Explore during Pixel NPI)
- > Our featured offers: BBY highlights varying devices/services on this section, in this case MacBook Pro, Apple Watch and S23 offers (consider negotiating for P7/Pro banners on this fold)



- Although S23 home page banners are taken off, Samsung continues to dominate Deals pages 'Save upto \$780 with Pre-order of Samsung Galaxy S23 Series. Plus get a \$100 Bestbuy gift card'
- All S22 series and Apple's 'n-1' series advertisements have been replaced by the new S23 series promos
- Bump up in TI for Z4 series from \$1000 to \$1400



Apple.com (1P)

Apple.com's 1P has a brand ethos focus v/s only tangible device or product focus. Ecosystem offerings (wearables, laptops) are given just as much importance as phones, while also focusing on non-tangible areas such as Black communities support, SuperBowl

- i14 Pro's \$1000 NLA TI for AT&T and T-Mobile highlighted on homepage top fold



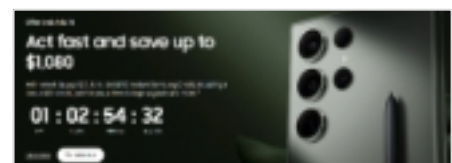
- Continued focus on broad-based issues through offering such as Black Unity watch band and matching watch faces to support Black communities
- Apple Watch Series 8, iPad and MacBook Pro have dedicated sections on the home page 3F onwards



Samsung.com (1P)

Continued focus on S23 pre-order and Samsung credit offers

- Samsung continued to promote its Galaxy S23 Ultra on the landing page with top banner placement and a similar FOMO strategy as AT&T, with the pre-order offer ending on 2/16



- The unique discount promo/messaging for S23 Ultra increased from \$780 to \$1080
- In the bottom fold of the landing page, Samsung has revived its marketing hashtag from a 2018 campaign #DoWhatYouCant - tapping into aspirational and youthful sentiments and discussing potential of its ecosystem offerings - photography, home automation and design etc.







# KPI deep dive

(Brand Prominence, Traffic & Market Share)

Samsung took over landing pages all carriers and devices ahead of the launch, with as much as 94% prominence on AT&T's Android platform. The OEM had strongest placements even on iOS devices of all carriers, an unusual and significant feat

