



Consumer Marketing Messaging | Key Models

Marketing Messaging by carrier for key models | As of 9 Jan 2024

🟢 = Advantage 🟡 = On par 🟠 = some gap 🔴 = Disadvantage | Indicates Pixel's promo message strength v/s competition¹

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	Get Google Pixel Buds-A-Series FREE when you buy P7 or P7 Pro/ Or Save up to \$600 on P7 Pro	\$600
	P6 Pro	Get 50% off Pixel Buds/ \$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	🔴 Get up to \$800 off with trade when you add a new line	\$800
	i14 Pro	🔴 i14 Pro on us	\$1000	🟡 Get Apple Watch Series 7, on us. When you buy i14 Pro	\$1000	🔴 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.	\$0	🔴 Get up to \$730 off with trade and new line	\$730
	i13 Pro	🟡 \$25/mo - No trade-in required	\$350	🟢 Now \$5/ mo. Online only.	\$0	🔴 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 trade on Magenta MAX	\$400
	Z Flip 4	🟡 Up to \$800 off w/ Trade	\$800	🟡 Trade-in and save, plus gift on us.	\$1000	🟢 Gift one for FREE	\$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	Get 50% off Pixel Buds/ \$20.56/ mo	\$350	Save \$300. Online only.	\$0	\$25/ mo	\$0
	i14 Plus	🔴 Get it for \$0 w/ trade	\$1000	🟡 As low as \$5/ mo	\$0	🔴 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	🔴 [REDACTED]	\$800
	i13	🔴 \$5/mo - No trade-in required	\$350	🟡 As low as \$5/mo	\$0	🔴 Get up to \$730 off with trade and new line	\$730
	i13 mini	🟢 \$17.50/mo	\$350	🟢 Get it on us. Online Only	\$600	🟢 BOGO \$700 off	\$730
	S22	🔴 Samsung Galaxy S22 FREE!	\$800	🟡 Trade-in and save, plus gift on us	\$800	🟡 Free Galaxy S22 plus Free Buds2/ Get up to 50% off	\$400
	S21 FE	🔴 \$5/mo - No trade-in required	\$350	🟢 Get Samsung Galaxy S21FE for \$10/mo.	\$700	🔴 Up to \$800 off with new line on Magenta MAX	\$400
	P6a	\$2/ mo - No trade-in required	\$350	Get it free.	\$0	Get one ON US with new line	\$300
\$300 - \$500	iSe3	🟡 \$5/ mo - No trade-in required	\$350	🟡 Get it free	\$0	🟢 Get up to 50% off with trade	\$400
	P6a	\$2/ mo - No trade-in required	\$350	Get it free	\$0	🟢 Only \$99	\$0

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 indicate RP of devices where no specific marketing messages were available on key line items

Segment	Model	BestBuy	Apple.com	Samsung.com
\$800 - \$1000	P7 Pro	\$749.00 with activation today. Save \$150. (Unlocked)		
	P6 Pro	\$649.99 with activation today. Save \$349.01 (Unlocked)		
	i14 Pro max	Save upto \$1000 on iPhone 14 series with trade-in of your old or damaged phone and qualified activation. (Verizon)	From \$1099 or \$45.79/mo. For 24 mo. before trade in	
	i14 Pro	i14 Pro. pro. Beyond. Save up to \$1000 with qualified activation and trade-in of iPhone 12 or newer	Pro. Beyond. From \$999 or \$41.62/mo. for 24 mo. before trade-in	
	i13 Pro Max	iPhone 13/ iPhone 14 Series Buy 1, save up to \$700 on 2nd with qualified activation and monthly payment plan (T-Mobile).	-	
	i13 Pro	iPhone 13/ iPhone 14 Series Buy 1, save up to \$700 on 2nd with qualified activation and monthly payment plan (T-Mobile).	-	
	Z Fold4	Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in of your old or damaged phone and qualified activation for Verizon. Save up to \$400 on Samsung Galaxy S22 Series with qualified activation on a Magenta Max Plan for T-Mobile and trade-in of an eligible phone		Get up to \$600 enhanced trade-in credit for a limited time
	S22 Ultra	Save up to \$1250on Samsung Galaxy S22 Series with select trade-in of your old or damaged phone and qualified activation. Or Save upto \$250 without trade-in. (Verizon)		Get \$200 off. Plus, get up to \$280 instant trade-in credit.
	S22+	Save up to \$1250on Samsung Galaxy S22 Series with select trade-in of your old or damaged phone and qualified activation. Or Save upto \$250 without trade-in. (Verizon)		Get up to \$150 off. Plus, get up to \$185 instant trade-in credit.
(\$500- \$800	Z Flip 4	Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in of your old or damaged phone and qualified activation for Verizon. Save up to \$400 on Samsung Galaxy S22 Series with qualified activation on a Magenta Max Plan for T-Mobile and trade-in of an eligible phone		From \$889.99 \$1059.99 with eligible trade-in@ \$37.09/mo \$44.17/mo for 24 mo® with Samsung Financing
	P7	\$499.00 with activation today. Save \$100. (Unlocked)		
	P6	\$279.99 with activation today. Save \$419.0 (Unlocked)		
	i14 Plus	i14 and i14 Plus. Big and Bigger. Save up to \$800 with qualified activation and trade-in	From \$899 or \$37.45/mo.per month for 24 mo.months before trade-in	
	i14	i14 and i14 Plus. Big and Bigger. Save up to \$800 with qualified activation and trade-in	IPHONE 14 Big and bigger. From \$799.00 or \$33.29/mo. for 24 mo before trade-in*	
	i13	Select iPhone 13 Save up to \$600 with trade-in of your own or damaged phone and qualified activation for Verizon. iPhone 13/ iPhone 14 Series Buy 1, save up to \$700 on 2nd with qualified activation and monthly payment plan (T-Mobile).	From \$699or \$29.12/mo.per month for 24 mo.months before trade-in	
	i13 mini	iPhone 13/ iPhone 14 Series Buy 1, save up to \$700 on 2nd with qualified activation and monthly payment plan (T-Mobile).	From \$599 or \$24.95/mo.per month for 24 mo.months before trade-in	
	S22	Save up to \$1250on Samsung Galaxy S22 Series with select trade-in of your old or damaged phone and qualified activation. Or Save upto \$250 without trade-in. (Verizon)		Get up to \$150 off. Plus, get up to \$185 instant trade-in credit.
\$300 - \$500	S21 FE	\$549.99 with activation today. Save \$150		Galaxy S21 FE 5G, 128 GB (Verizon) Save \$350 from \$349.99 with trade-in
	P6a	\$449.00 with activation today. Save \$100. (Unlocked)		
	iSe3	\$11.95/mo for 36 months; 0% APR (AT&T)	From \$429or \$17.87/mo.per month for 24 mo.months before trade-in	
	A53	\$349 with activation today. Save \$100. Was \$449		Galaxy A53 5G, 128 GB (AT&T) Save \$55 from \$394.99 with trade-in

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 indicate RP of devices where no specific marketing messages were available on key landing pages

Highlights

- The i14 series poses strong competition to Pixel's Marketing Messaging strength on both AT&T and T-Mobile

Opportunities for Pixel

- Strengthen P7 Pro messaging on T-Mo - while it does have both uniq disc ~\$500 & TI upto \$600, *these are only in small case under the P7 Free promo*. Another promo only mentions the Pixel Buds A Series bundle (only \$100) thus missing out on the stronger offer



- Hero device: i14 Pro present with top placement on landing page and Deals page, with strong promo messaging (Up to \$1000 off with eligible trade-in and On Us).



- Marketing messaging strength for Pixel is weaker than the i14 series - i14, i14 Plus, i14 Pro and i14 Pro Max, which are 'ON US' and have 'Up to \$1000 off w/ Trade'
- i14 series has strong prominence on the Phones & Devices Page followed by Samsung Galaxy S22, and almost all models are at \$0/mo (except the Pro Max),



- i14 Pro, S22+ & P7 Pro dominates all top placements on all landing pages with strong marketing messaging. Only the Homepage is missing Pixel advertisement where as S22+ and i14 Pro offers are being highlighted on the same.



- Strong bundle offer (all advertisements are for watches of the respective brands) promotion of premium segment phones throughout the website. "Get Apple Watch Series7, on us. When you buy i14 Pro" (Apple), "Get Samsung Galaxy Watch5 for Free. When you buy S22+" (Samsung), "Get Google Pixel Watch for Free. When you buy P7 Pro" (Google).



- Hero Device: i14 continues to dominate the carrier website with multiple top placements on all landing pages with compelling marketing messages.



- Pixel marketing messaging is significantly weaker on the carrier website (both for premium /ultra-premium and mid-segment), even though P7 Pro has unique discount of approximately \$500 and a trade-in value of up to \$600.



Highlights

- Apple.com’s device focus have a prominence order of i14 > i14 Pro > SE3

Opportunities for Pixel

- Even though Pixel phones are available under all carriers, it can be seen being marketed only as Unlocked phones, while the iPhones (14 and 13 series), S22, and Z series are running promotions with multiple banners on the Phone deals page that showcase all eligible carriers and their corresponding deals.



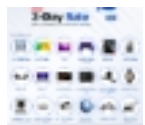
- Hero Device: i14 Pro continues to dominate BestBuy’s Phone Deals pages, followed by multiple promotions and strong marketing messaging of the i14 series.



- Z Series section on Phone Deals page reintroduced with strong marketing messages for Verizon “Save upto \$1000”.



- BestBuy has an ongoing 3-day sale on all their devices till 9th January.



Apple.com (1P)

- Very few updates seen across the website over a period of time
- Continuous marketing of Apple card on their Homepage offering up to 3% unlimited Daily Cash back on every purchase and even more cashback on select merchants.



- 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.cm (1P)

- Hero Device: Galaxy Z Fold4, Galaxy Z Flip4 and Galaxy S22 Ultra are highlighted under the Smartphones & Wearables section of the website. However, the S22 model is more prominently highlighted on carrier websites such as AT&T and T-Mobile.



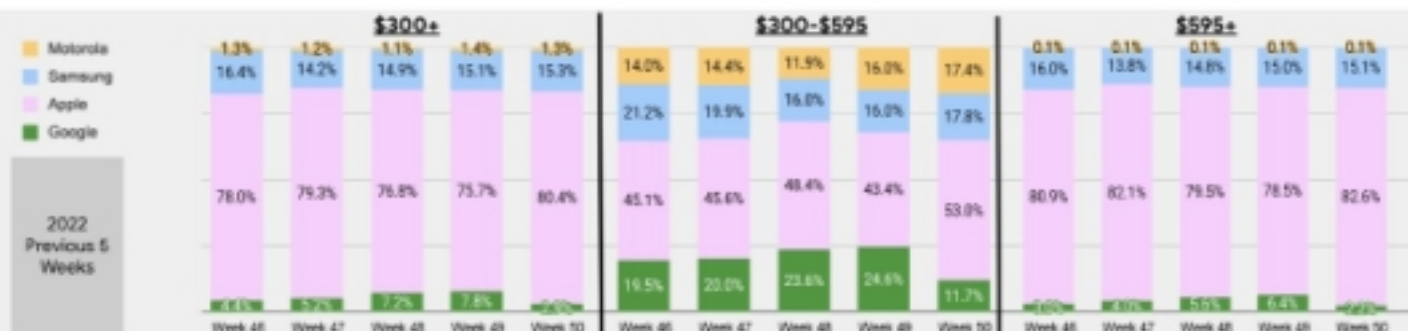
- Samsung has not highlighted any of its phone models on the banner of the landing page. Instead, it is now focusing on the Samsung Neo QLED 4K, an exclusive offer for Galaxy speakers and promos on ‘Galaxy Unpacked’.





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

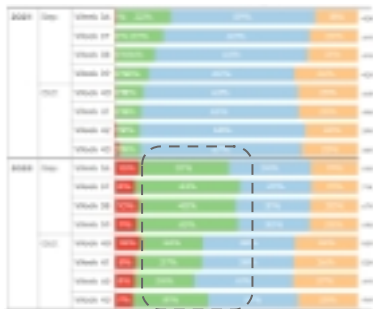
Current market overview | \$300-\$499 MSRP

Verizon

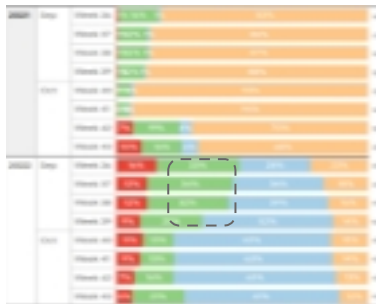
T-Mobile

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	Now \$5 mo.
NLA/Upg?	NLA	NLA	NLA
T/I required	no	no	no
NLA TCO	\$0	\$1	\$180

GOOGLE APPLE SAMSUNG OTHER

	Us	Apple	Samsung
Device	P6a	SE 3rd gen	A53
MSRP	\$449	\$429	\$450
Mkt message	On Us with Newline	Get up to 50% off with trade	Only \$99
NLA/Upg?	NLA	Both	Both
T/I required	no	Yes	no
NLA TCO	\$0	\$83	\$450

GOOGLE APPLE SAMSUNG OTHER

	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	\$292

GOOGLE APPLE SAMSUNG OTHER

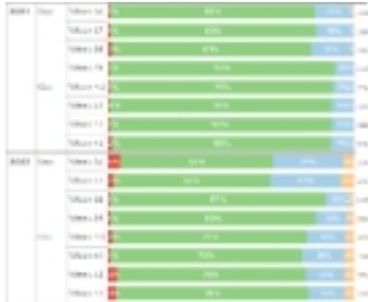
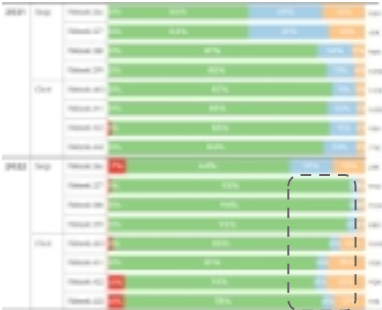
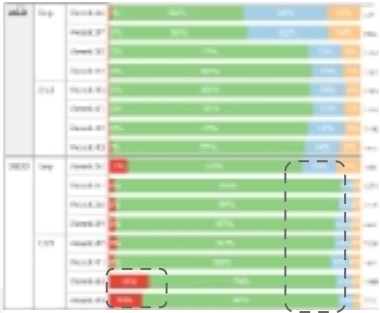
Current market overview | \$500-\$799 MSRP

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 on us. Online Only	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/ The perfect pair/ Get iPhone 14 & AirPods ON US	Free Samsung Galaxy S22 plus free Buds2/Trade-in and save, plus gift on us
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?	NLA	Both	Both
T/I required	No	Yes	Yes
NLA TCO	\$359	\$87	\$60

GOOGLE APPLE SAMSUNG OTHER

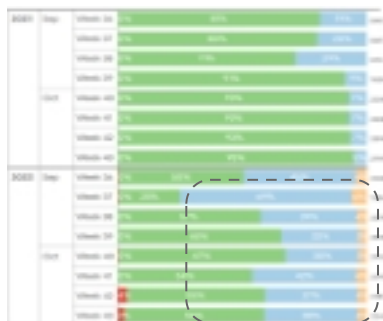
Current market overview | \$800-\$999 MSRP

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.*	Get Apple Watch Series 7, on us. When you buy i14 Pro.*	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	Get Pixel Buds-A-Series FREE when you buy P7/ P7 Pro Or Save up to \$600 on P7 Pro*	Get up to \$800 off with trade when you add a new line	Gift one for FREE
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