

Exec Summary:

- **Growth in non-TI promo for SS (Potential S23 tactic):** SS seems to be pushing its entry segment S21 FE and A53 models on both VZN and BBY ATT with increasing non-TI (unique discounts) across carriers, potentially in a bid to launch S23 with strong TI offers. TI was taken off all SS models on VZN Unltd LW. [Highlight Pixel's strong TI via marketing messaging, especially on VZN All Unltd](#)
- **Need for improvement in Pixel's Best Buy placements:** P7 Series has higher competitiveness v/s i14, Z4 and S22 series on BBY T-Mo but lags on BBY VZN, where competitors have upto \$1000 off. However Pixel marketing messages on the website usually have the highest prominence under the Unlocked offer section (currently offering \$150-\$100 off, much lower than Pixel's BBY T-Mo and VZN offers at upto \$900 off with TI). Pixel also [needs to have a section head](#) under Deals > Cell Phones unlike iPhone and Samsung (ref below).



- **Traffic ↑ for SS on AT&T & T-Mo:** SS seems to be the only OEM gaining traffic on AT&T and T-Mo. SS Android BP on T-Mo grew marginally, with Z Flip/Fold4 ads getting higher prominence. [Study sources of SS traffic](#)
- **Improved placements + promos + traffic ↑ for Apple on VZN:** Apple continues to have growing traffic on VZN in line with its BP growth (continued focus on i13 Deal and i14 Plus Online Only offer). Apple Promos ↑: i13 Uniq. Disc. ↑ by 35%, Bundle value on iPad ↑ by 130% for all iPhones. However, both P7 and P7 Pro continue to have lowest segment TCO - hence worthwhile to [explore ways to ↑ Pixel traffic](#)
- **Discontinuation of bundles:** All bundles across OEMs taken off on both T-Mo and AT&T (Can [evaluate customer affinity to bundles](#) on these platforms post Holiday season)



Consumer Marketing Messaging | Key Models

Marketing Messaging by carrier for key models | As of 16 Jan 2025

🟢 = 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	Save up to \$600 with trade on MAX/ Or 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	🟡 Get up to \$800 off with trade when you add a new line	\$800
	i14 Pro	🟡 i14 Pro on us	\$1000	🟡 Amazing together. 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.	\$600	🟡 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.	\$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 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.	\$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
	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
¹ 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, on us					\$0	🟢 Only \$99	\$0

Segment	Model	BestBuy	Apple.com	Samsung.com
\$800 - \$1000	P7 Pro	\$749.00 with activation today. Save \$150. (Unlocked) Save up to \$900 on Pixel 7 Series with TI (VZN), Save up to \$800 on P7/P7 Pro with TI (T-Mo)		
	P6 Pro	\$539.99 with activation today. Save \$359.01 (Unlocked)		
	i14 Pro max	<div>Save upto \$1000 on iPhone 14 Series with select trade-in of your old or damaged phone and qualified activation for Verizon.</div> <div>Save upto \$1000 on iPhone 14 Series with qualified activation and trade-in for AT&T.</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>Save upto \$1000 on iPhone 14 Series with select trade-in of your old or damaged phone and qualified activation for Verizon.</div> <div>Save upto \$1000 on iPhone 14 Series with qualified activation and trade-in for AT&T.</div> <div>Save upto \$800 on iPhone 14 Series with qualified activation and trade-in for T-Mobile.</div>	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	<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>Save up to \$400 on Samsung Galaxy S22 Series with qualified activation on a Magenta Max Plan for T-Mobile and trade-in</div>		From \$1584.99 with eligible trade-in. \$66.05/ mo for 24 mo with Samsung Financing
	S22 Ultra	<div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$250 without trade-in. (Verizon)</div> <div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$200 without trade-in. (AT&T)</div> <div>Save up to \$400 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$250 without trade-in. (T-Mobile)</div>		It's time to break the rules. Get \$200 off S22 Ultra. Plus, get up to \$280 trade-in credit. From \$719.00 with eligible trade-in
	S22+	<div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$250 without trade-in. (Verizon)</div> <div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$200 without trade-in. (AT&T)</div> <div>Save up to \$400 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>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>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</div>		From \$889.99 \$1059.99 with eligible trade-in\$37.09/mo \$44.17/mo for 24 mo® with Samsung Financing
(\$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 \$800 on P7/P7 Pro with TI (T-Mo)		
	P6	\$279.99 with activation today. Save \$419.0 (Unlocked)		
	i14 Plus	<div>i14 and i14 Plus. Big and Bigger. Save up to \$800 with qualified activation and trade-in (Carrier not mentioned)</div> <div>Save upto \$1000 on iPhone 14 Series with select trade-in for Verizon.</div> <div>Save upto \$1000 on iPhone 14 Series with qualified activation and trade-in for AT&T.</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>i14 and i14 Plus. Big and Bigger. Save up to \$800 with qualified activation and trade-in</div> <div>Save upto \$1000 on iPhone 14 Series with select trade-in for Verizon.</div> <div>Save upto \$1000 on iPhone 14 Series with qualified activation and trade-in for AT&T.</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 \$799.00 or \$33.29/mo. for 24 mo before trade-in*	
	i13	<div>Select iPhone 13 Save up to \$600 with trade-in of your own or damaged phone and qualified activation for Verizon.</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 \$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	<div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$250 without trade-in. (Verizon)</div> <div>Save up to \$1000 on Samsung Galaxy S22 Series with select trade-in. Or Save upto \$200 without trade-in. (AT&T)</div> <div>Save up to \$400 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 mo¹ with Samsung Financing
	P6a	\$349.00 with activation today. Save \$100. (Unlocked)		
	iSe3	\$11.95/mo for 36 months; 0% APR (AT&T)	Love the Power. Love the Price. From \$429or \$17.87/mo.per month for 24 mo. before TI	
\$300 - \$500				
				Verizon, 128 GB. From \$419.99 \$499.99 with eligible trade-in\$17.51/mo \$20.84/mo for 24 mo¹ with Samsung Financing

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 any text or image format of devices where no specific marketing messages were available as of 16 Jan 2023. Was \$449

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

Highlights

- In comparison to Pixel phones, lower-end competitors' smartphones (i13 & A53) have better messaging and placement on Verizon
- Overall, 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. P7 is at a disadvantage on AT&T

Opportunities for Pixel

- P7 Pro has room for improvement in marketing messaging tactics v/s the competitors on T-Mobile, and P7 on ATT



- **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).



- Apple i14 series offers a competition to the marketing messaging strength of Pixel on the carrier website as it stands at a 'Disadvantage' across both its segments.
- The order of priority of brands on the Phones & Devices page is as follows:

Apple > Samsung > Google

- In correspondence, the same priority order is followed when it comes to the marketing messaging strength as per the color analysis:

Apple > Samsung > Google



- **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 and Samsung Galaxy A53 were on top fold of the Deals page with a new & stronger marketing message 'ON US' in the last week (from 1.11 to 1.17)



- **Hero Device: i14** continues to dominate the carrier website with multiple top placements across all landing pages, and is also the first model displayed on the Phones page.
- The bundle offer for i14 with AirPods has been replaced with an 'On Us' marketing message.



- The marketing message for P7 Pro with a bundle offer on Buds has been removed with a continued focus on P7



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



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



- Trade-in value in the marketing messages for S22 series has reduced from 'Save upto \$1250' to 'Save upto \$1000' (Verizon).



- BestBuy continues to offer great deals with an ongoing **4-day sale** on all their devices till 19th January.



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.

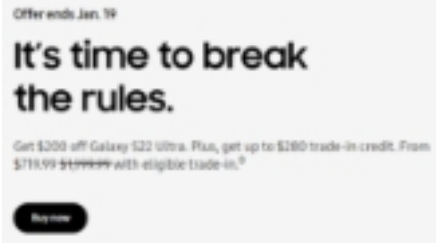


- Apple can be seen promoting their 14 series and SE3 more than their n-1 series, possibly to attract customers who can afford to pay lump sum towards their newly launched devices and vice versa for SE3.

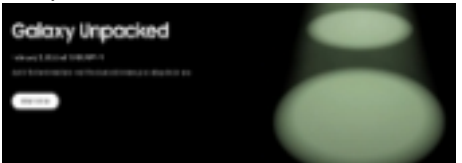


Samsung.cm (1P)

- Hero Device: S22 Ultra** is the new face of the landing page on Samsung (limited time offer marketing message), with a shift from its focus on **Galaxy Z Flip4** and **Fold4** along with S22 Ultra two weeks back. Samsung did not promote any phone models on its landing page in the last week.



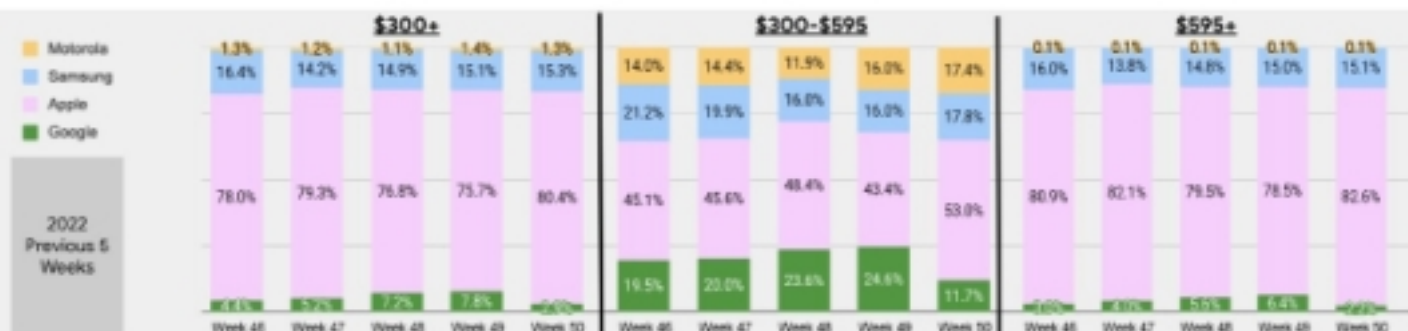
- Samsung started promoting its Galaxy Unpacked 2023 last week and continues to do so on its landing page. It has a launch date of 1st Feb 2023 at 10 AM. The teaser was launched on Jan 18th to hype up the event,





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

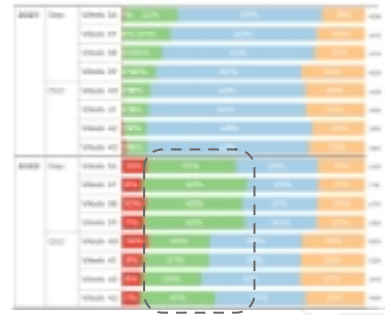
Current market overview | \$300-\$499 MSRP

Verizon

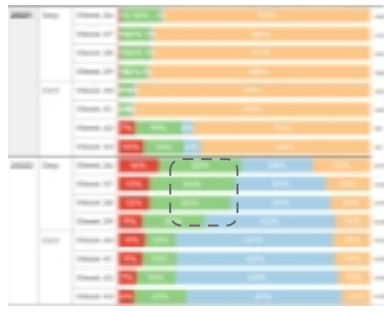
T-Mobile

AT&T

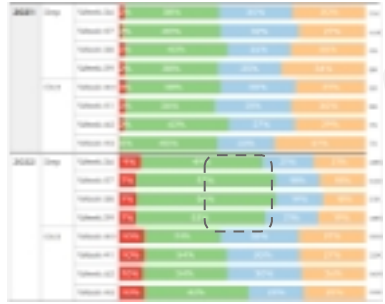
Market share trends



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	\$1

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

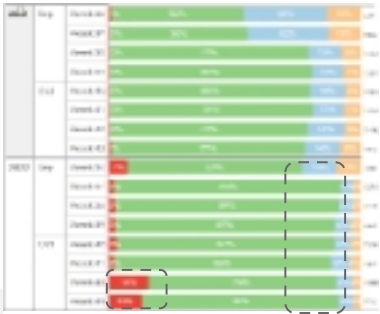
	Us	Apple	Samsung
Device	P6a	SE 3rd gen	A53
MSRP	\$470	\$429	\$450
Mkt message	Get for \$2/mo	Get it for \$5 / mo	Get it for 12.50/ mo
NLA/Upg?	Both	Both	Both
T/I required	no	no	no
NLA TCO	\$72	\$180	\$292

GOOGLE APPLE SAMSUNG OTHER

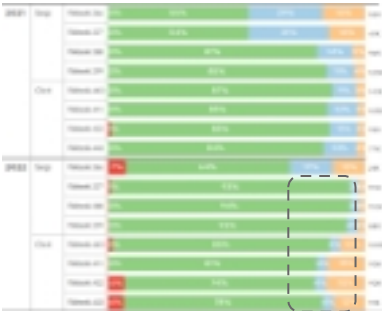
Current market overview | \$500-\$799 MSRP

Verizon	T-Mobile	AT&T
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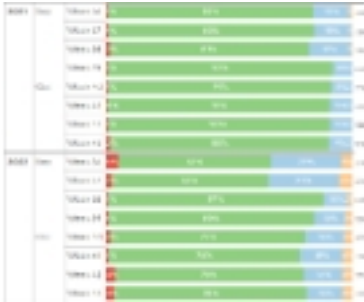
Market share trends



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