



# Technology Insights..

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Research, Analysis, Strategy, Insight

## Samsung Galaxy Unpacked: A Missed Opportunity

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Samsung recently unveiled a new family of Galaxy smartphones - the S23 family. It includes a number of improvements, especially in the camera subsystem, and enhancements due to a version of the latest Snapdragon 8 chip created by Qualcomm for use by Samsung. It's a good example of the innovation new generation devices bring to market as smartphones have matured and we've moved down the innovation curve: no groundbreaking innovations but lots of solid refinements.

In addition to launch of the renewed Smartphone line, Samsung also launched updated PCs - an area that Samsung has increasingly paid attention to as it attempts to become a major player in the laptop market, albeit heavily targeted at the consumer space. With the announcement of the Galaxy Book3 family of PCs, Samsung is targeting the higher end market for both gaming with its Galaxy Book3 Ultra that includes an Nvidia GPU, and the convertible market with its Galaxy Book3 360 and 360 Pro products. All include the latest 13th generation Intel core processors and enhanced screens, as well as the ability to seamlessly move sessions between PC and smartphone. And while these devices show that Samsung is interested in premium products (devices are priced from \$1299 to \$2399 for the Ultra), we believe they missed a major opportunity to leverage their expertise and be a leader in an emerging market segment.

### Where's the 5G?

Samsung missed a major opportunity to become a leader in 5G connected laptops. They are building premium devices, many of which would be attractive to business users and pro-sumers, and those users would relish a new connectivity option. But Samsung has not given these users a compelling reason to buy Galaxy Books relative to the mainstream laptop vendors (e.g., Dell, HP, Lenovo). 5G could have been that compelling reason.

Our research indicates that the potential laptop business market in the US is 9.2M units per year. Our research further shows that many business users are willing to pay a reasonable premium for a 5G connected device, and expect to obtain a 10% productivity improvement on average with 5G connectivity. What's holding this market back is on the one hand, the lack of vision by laptop producers and service providers, and on the other hand the high cost of the few available laptops that can include a 5G option. Indeed, we estimate that the average price uplift cost to be \$300-\$400 to include a 5G option,

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above the already high price being paid for a premium laptop. And while there has been some push to build more reasonably priced ARM-based 5G connected device (e.g., the Always Connected PC, or ACPC), most users are still hesitant to buy machines that don't include an x86 (Intel or AMD) processor.

Samsung has the technology and expertise to put 5G in a machine for a reasonable price that other laptop vendors like Dell and HP don't. Given how many 5G phones they produce, that scale could allow adapting one of their smartphone 5G subsystems for inclusion in a laptop. (The other major laptop maker with a smartphone business, Lenovo, could also leverage their wireless device expertise through their Motorola smartphone division, but has also chosen to be mostly absent from the market). Samsung could have redefined or extended the Galaxy brand that equates with premium wireless connectivity to include its laptops. That would have put them way ahead in a nascent market that needs a push-start.

Among all the laptop players, Samsung has unique expertise in making 5G affordable and working well in a series of laptops. But Qualcomm shares some of the blame here as well since they work so closely with Samsung and could have made it attractive to use their 5G modems in the Galaxy Books beyond just using Snapdragon 8 chips in the newly released smartphones. Samsung also owns a critical channel for 5G laptops by having working relationships with all of the carriers that the typical laptop vendors don't, which they could have leveraged.

**Bottom Line:** We believe Samsung missed a major market opportunity by not offering a 5G option in the new Galaxy Book series. Samsung needs to lose the consumer-only mentality and target its laptops for business users like it does its smartphones, as part of the Google Android Enterprise (Microsoft has similar initiatives in the PC space). Samsung also missed the business market opportunity by not extending the Knox branding to the laptops, making the security message they are famous for in smartphones a key differentiator in their laptop lines and also extending the Knox management suite to include the Galaxy Books. Samsung says the Galaxy Books are protected by Knox in some fine print on their announcement, but no explicit information about managing the device with Knox Suite was included. Overall, we think Samsung missed a major opportunity in not promoting their premium devices to include more business user appeal.



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