



Consumer Technology Association, producer of CES®

Wireless Retail Industry Overview

Produced by:

**Wireless Division
Retailer Council**





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This document provides an overview of where wireless technology and products are sold in the US. As wireless technology has become ubiquitous to all of us, its retail presence has expanded as well. This overview serves as an essential resource for detailed insights into the types of retailers selling wireless today.

By categorizing retailers and highlighting their carrier affiliations, product offerings, service levels, and market trends, we seek to educate readers with valuable information for strategic planning, investment decision-making, market entry, and marketing strategy optimization.

Thank you,

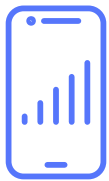
The CTA Winning at Wireless Retail Working Group

A joint effort by the Wireless Division & Retailer Council

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Who is the Wireless Retail Industry?



**Mobile Network
Operator Owned**



**Broadband/Cable
Owned**



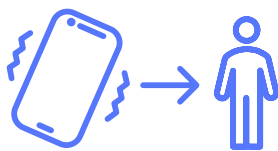
Dealer Owned
Prepaid, Carrier-Exclusive
Postpaid, Carrier-Exclusive



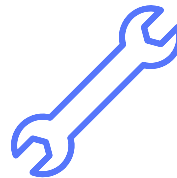
**Independent
Retailer**



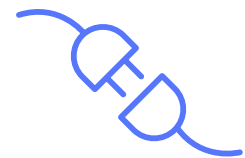
National Retailer
OEM
Prepaid/Postpaid



Direct-to-Consumer



Repair Stores
Corporate Owned
Independent



Accessory Only

Who is the Wireless Retail Industry?

| Store Type | Carrier Affiliation | Typically Sell | Service Level | Typical Location | Customer Profile |
|---|----------------------------|-------------------------|------------------------------|---------------------------|-----------------------------|
| Mobile Network Operator-Owned Stores | Major carriers | Postpaid, broadband | Highest | Tier 1 Real Estate | Urban, Suburban |
| Broadband/Cable-Owned Stores | Cable MVNOs | Bundles, services | High | Tier 1 Real Estate | Urban, Suburban |
| Dealer-Owned Stores - Postpaid, Carrier-Exclusive | Single Carrier | Postpaid, like carriers | High | <Tier 1 Plazas, malls | Low Density, Rural |
| Dealer-Owned Stores - Prepaid, Carrier-Exclusive | Single Carrier | Prepaid, accessories | High | <Tier 1 Plazas, malls | Limited income |
| Dealer-Owned Stores - Prepaid, Multi-Carrier | Multiple Carriers | Prepaid, accessories | Typically moderate, variable | <Tier 1 Plazas, malls | Limited Income |
| National Retail / Big Box Postpaid | Variable | Postpaid, accessories | Typically low, variable | High traffic, stand alone | Urban, Suburban |
| National Retail Prepaid | Variable | Prepaid, accessories | Variable | High traffic, stand alone | Urban, Suburban |
| National Retail - OEM | Multiple Postpaid carriers | Brand products | Very high | High traffic, stand alone | High Income Urban, Suburban |
| Direct to Consumer | Variable | Devices, accessories | Low | Online, broadcast | Variable |
| Repair Stores - Independent | Typically unaffiliated | Repairs, accessories | Moderate-High | Widespread | Variable |
| Repair Stores - Corporate Owned | Unaffiliated | Repairs, accessories | Very high | Variable | Urban, Suburban |
| Accessory-Only Locations | Unaffiliated | Accessories | Low | Widespread | Traveling |

Wireless Retail Types

Mobile Network Operator-Owned Stores:

- **Carrier Affiliation:** AT&T, Verizon, T-Mobile, Boost Mobile (EchoStar) owned, staffed and operated stores.
- **Typically Sell:** Focus on postpaid activations and increasingly, broadband. Inventory includes wide range of phones, accessories and often incremental products like laptops, high-end speakers, etc. Large focus on additional service sales like device protection.
- **Service Level:** Highest level of service, sales reps are employees of the carrier.
- **Typical Location:** Tier 1 real estate locations, mainly in high-population urban/suburban areas.



Broadband/Cable-Owned Stores:

- **Carrier Affiliation:** Comcast, Charter, Spectrum and Altice operating as MVNO's off of MNO Networks with postpaid.
- **Typically Sell:** Bundles of cable, phone and internet service. Often also serves as a service center for cable or internet customers.
- **Service Level:** High level of service, reps are employed by the cable company.
- **Typical Location:** Tier 1 real estate locations, mainly in high population urban/suburban areas.

Dealer-Owned Stores –

Postpaid, Carrier-Exclusive:

- **Carrier Affiliation:** Exclusively authorized to one carrier.
- **Typically Sell:** Mirrors products and services offered in carrier-owned stores. Some locations carry different accessory brands, and focus on different handsets. Most sell limited prepaid. Increasing sales of non-cellular connected smart home products, such as speakers and thermostats.
- **Service Level:** Typically high, carrier closely monitors performance, but sales reps are employees of the dealer company.
- **Typical Location:** Fills in gaps for carrier stores, tend to be slightly less desirable real estate locations and often find dealers in lower pop/rural type locations.

Dealer-Owned Stores – Prepaid, Carrier-Exclusive:

- **Carrier Affiliation:** Exclusively authorized to one carrier.
- **Typically Sell:** Prepaid products and service – some sell limited postpaid products. Emphasis also on accessories, device protection and, often, repair services. Also, heavy focus on government funded programs which provide broadband service and access to free or low-cost devices for qualified households.
- **Service Level:** Varies, carrier monitors performance, but sales reps are employees of the dealer company.
- **Typical Location:** Often in malls, plazas but sometimes stand alone. Usually found in lower to mid-income neighborhoods.

Dealer-Owned Stores – Prepaid, Multi-Carrier (aka Independent Retail)

- **Carrier Affiliation:** Multiple carriers and MVNOs.
- **Typically Sell:** Prepaid airtime and activation, most emphasize other products that are sold with activations, such as devices, accessories, device protection, offer repairs. Some are exclusively wireless retailers, others are more like convenience stores. May sell pre-owned and refurbished products, with many stores also focusing heavily on eSIM-only transactions.
- **Typical Location:** In plazas, malls, a mall kiosk or street locations, usually in lower to mid-income neighborhoods.

National Retail / Big Box – Postpaid

- **Carrier Affiliation:** This varies – in some retailers, postpaid is offered for or each of the major MNOs (although the number varies by retailer) carriers (limited to 3) such as Best Buy and Walmart. In some retailers, they are exclusive to T-Mobile (Sam's Club). Costco's 570 clubs are now split with 1/2 of the clubs each separately selling exclusively AT&T or T-Mobile.
- **Typically Sell:** Varies between extensive and limited inventory of postpaid products and services; may offer carrier services like device protection or their own – or Apple's. A range of unlocked devices are offered, with post-paid and pre-paid service optional. All put a heavy emphasis on accessories.
- **Service Level:** Varies widely but typically lower productivity and performance when compared to MNO-owned stores, with staffing serving as a major issue for the past few years. Many of these retailers use third-party labor within their locations with employees working for and trained by those companies. Some use their own employees. Carriers are largely expected to train and field visit these sales reps.
- **Typical Location:** National retail locations usually are very high traffic, stand-alone real estate.



National Retail – Prepaid

- **Carrier Affiliation:** Varies widely. Most retailers have multiple brands offered, with Walmart offering the most-robust selection and leading the market in sales.
- **Typically Sell:** Could sell just SIM cards and airtime or offer actual “grab and go” packaged handsets with airtime. Walmart also offers its own branded prepaid products, which is its largest brand. Handset retailers usually do much better volume than just airtime retailers.
 - Some sell both prepaid and postpaid (ex: Walmart, Best Buy, Target)
 - Some only sell prepaid packages and SIMs (ex: Family Dollar, Dollar General, Walgreen).
 - Some sell only prepaid SIMs / Airtime (ex: CVS, Supermarkets)
 - All sell accessories.
- **Service Level:** If the retailer activates devices in store, service level is usually good. If not, service is non-existent, sales volume is low, and Consumer is left to make buying decisions and activate at home.
- **Typical Location:** National retail locations usually are very high traffic, stand-alone real estate. Prepaid airtime cards / SIMs are found in more than 100,000 locations and can be virtually any type of retailer (drug store, grocery store, dollar store, convenience store).

National Retail – OEM

- **Carrier Affiliation:** Offer all postpaid carrier activations
- **Typically Sell:** The entire suite of products under their own brand – Apple or Samsung. Products expand beyond wireless devices into other consumer electronics.
- **Service Level:** Very high. Sales people are brand ambassadors and highly trained in all aspects of the products and operating systems – i.e, “geniuses.” These are typically very well staffed stores and the quality of the sales and service teams are very highly rated by customers. These stores also provide repairs, tech support and additive services. Some blur the lines between retail and educational events beyond the products themselves but rather about the use of them (photography, music, etc.)
- **Typical Location:** Usually are very high traffic, stand-alone real estate or within busy shopping malls/plazas. Limited locations and often focus on higher income demographic areas.



Direct to Consumer

- **Carrier Affiliation:** Can be a single brand (like Mint Mobile) or multi-brand (like Amazon or QVC)
- **Typically Sell:** Large range of devices, both new and often refurbished as well as accessories and other companion products. May offer financing and sell other services like device protection. Unlocked devices are a popular sales item.
- **Service Level:** Often self-service. May offer a call center or may have no support beyond chat.
- **Typical Location:** Online or broadcast

Repair Stores - Independent

- **Carrier Affiliation:** Usually do not have carrier affiliation (just repairs) but some do operate as an independent wireless dealer.
- **Typically Sell:** Lead with repair services for phones but may offer accessories, pre-owned or new devices, airtime, device protection. Some also sell other non-connected devices, in addition to accessories.
- **Service Level:** Usually good, repairs are done in store with trained repair associates who often also have a sales role to upsell. Repair technicians may be certified but there is no requirement for that so results and quality can vary.
- **Typical Location:** There are 14,000 wireless repair stores in the US, 70% of which opened in the last 2 years – repair stores are popping up everywhere.



Repair Stores – Corporate Owned

- **Carrier Affiliation:** Not affiliated with a carrier – UbreakiFix (owned by insurance/ protection company Asurion) and CPR (owned by insurance/protection company Asurant) are two of the biggest. Often franchise or license to small retailers.
- **Typically Sell:** Repair services for phones, tablets, laptops, gaming systems. Some also offer sales for new or pre-owned or new devices, and most offer accessories. Some also sell other non-connected devices.
- **Service Level:** Very good, repairs are done in store with trained repair associates.
- **Typical Location:** Seem to locate in high population areas, urban/suburban.

Accessory-Only Locations

- **Carrier Affiliation:** Not affiliated with a carrier. Not interested in activation complications. Examples include Airport retailers (ex: Hudson and InMotion), grocery convenience and drug stores
- **Typically Sell:** From a broad to narrow range of branded accessories, some branded by the stores, some name brands (ex: Apple and Belkin). Product can range dramatically in quality, some with the highest levels, and some with the lowest levels (ex: gas stations).
- **Service Level:** While exceptions (eg, the Airports), generally very low, as they are “Grab and Go”.
- **Typical Location:** Located everywhere, especially in high-traffic areas with higher accessory needs (ex: airports and gas stations).





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