

BESPOKE SURVEYS

## Consumer Electronics Domestic Vol 37

1000+ US Consumers Balanced to Census

**CHECK BREAKDOWN:****TREND CHECKS****TESTING BNPL AND AN IPHONE RENTAL MODEL**

Among respondents who use Apple Pay, there is some degree of willingness to use a BNPL type feature if it were available on Apple Pay. Without consideration of the difference in monthly payment price, most iPhone owners would prefer to finance or pay for their iPhone upfront. 10% believe leasing an iPhone for monthly payments for as long as they use the phone would make the most sense. When we introduce price into the mix and tell iPhone owners that a rental might cost ~\$30 per month, 30.7% said they would prefer that to financing the phone for ~\$50 per month and owning the phone after 2-3 years.

**REFRESH CYCLES**

Smartphone refresh cycle expectations are flat q/q, which is an improvement relative to the historical trend in recent years of our survey in which refresh cycles were stretching.

**MARKET SHARE DYNAMICS**

Consumer electronics purchase activity and Apple product purchase activity is either flat q/q or in-line with seasonal trends in our survey. Engagement metrics have been generally on the upswing since October of 2020.

**APPLE / CONSUMER ELECTRONICS PURCHASE ENGAGEMENT**

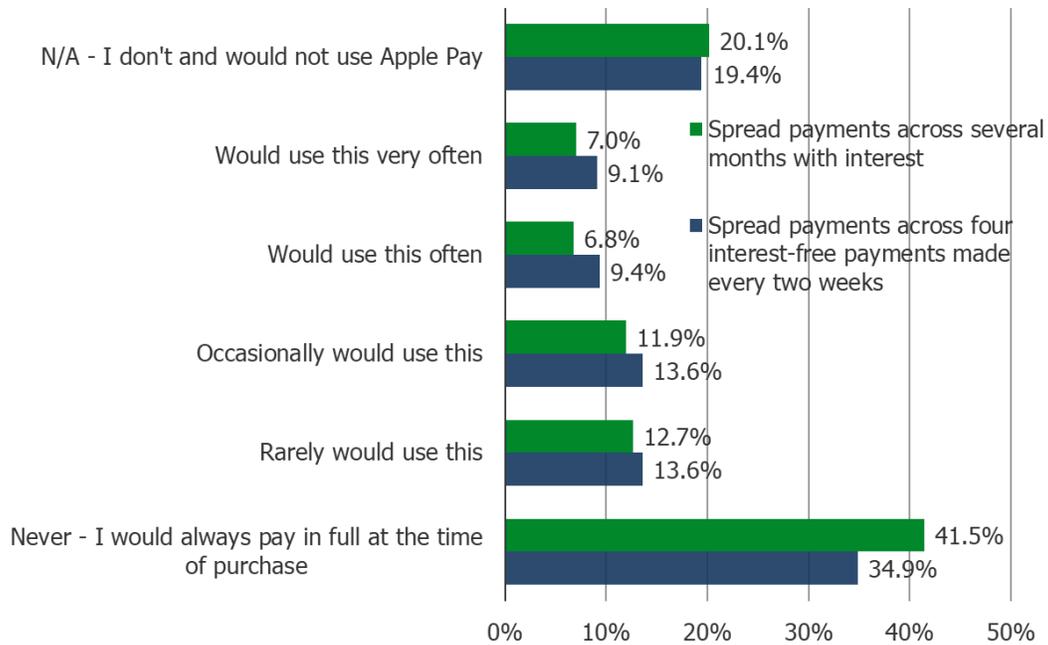
Market share dynamics and retention rates are positive and consistent sequentially.

# NEW QUESTIONS

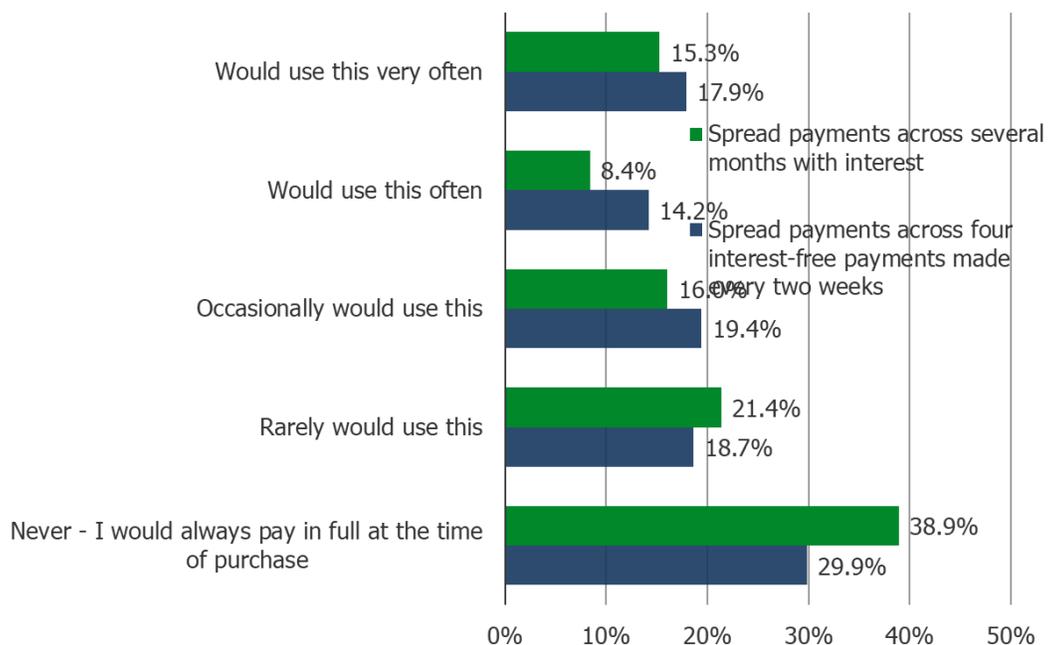
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IF APPLE PAY ALLOWED YOU TO SPREAD PAYMENTS YOU MAKE THROUGH APPLE PAY ACROSS FOUR INTEREST-FREE PAYMENTS MADE EVERY TWO WEEKS (OR ACROSS SEVERAL MONTHS WITH INTEREST) HOW OFTEN WOULD YOU CHOOSE TO PAY THIS WAY?

This question was posed to iPhone owners.

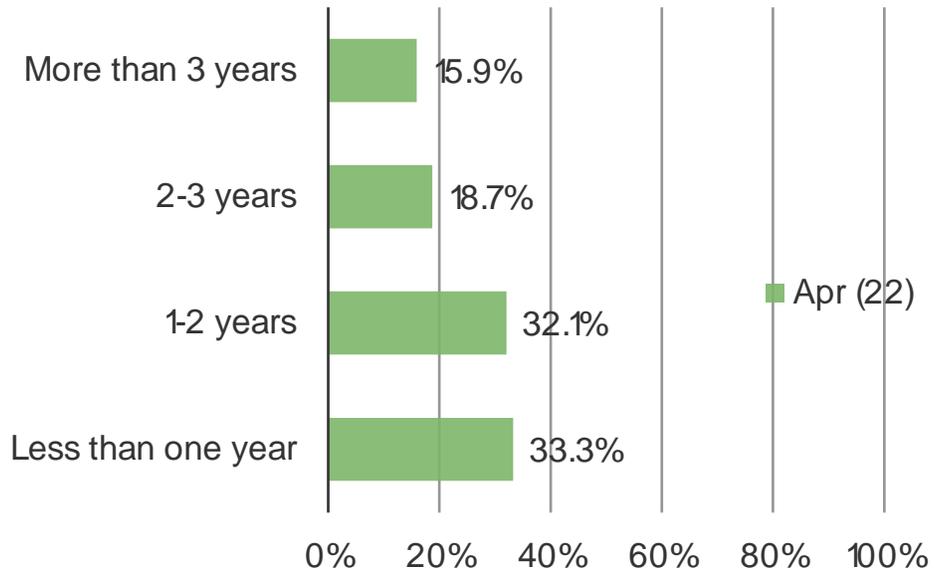


This question was posed to iPhone owners who said they have used Apple Pay in the past month.



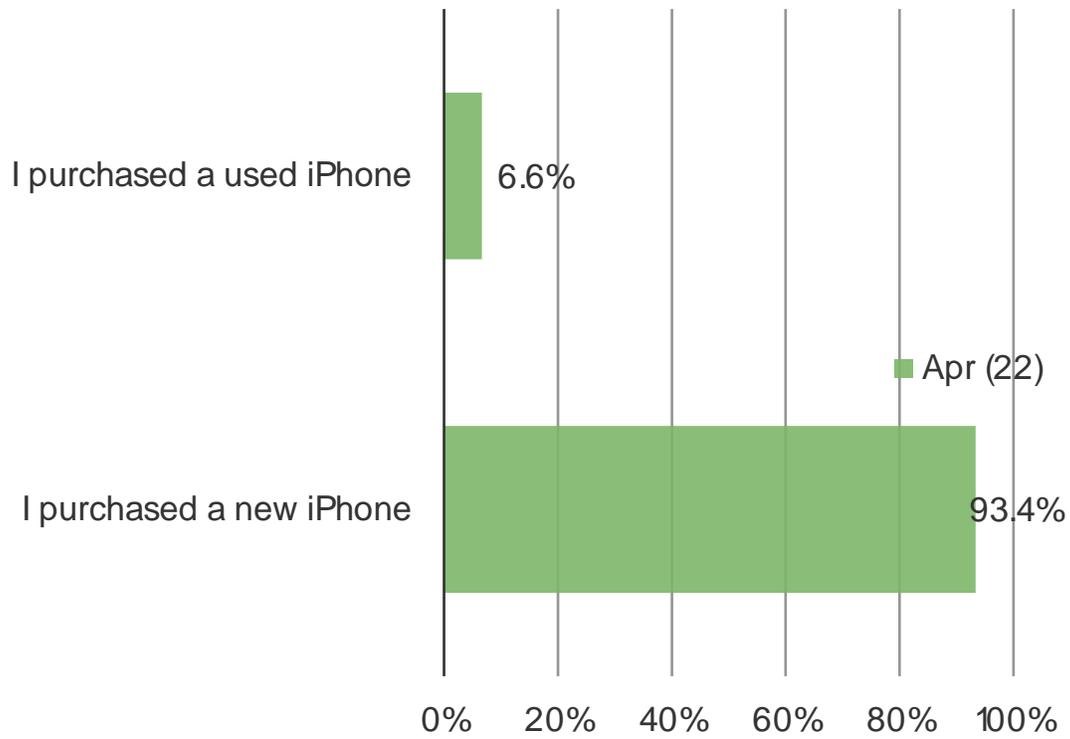
FOR HOW LONG HAVE YOU OWNED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



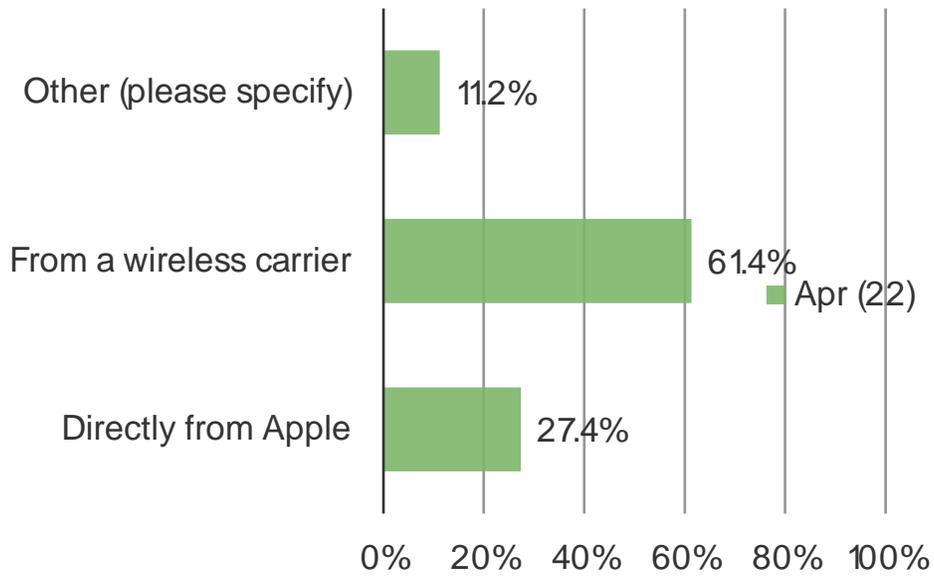
HOW DID YOU PURCHASE YOUR IPHONE?

This question was posed to iPhone owners.



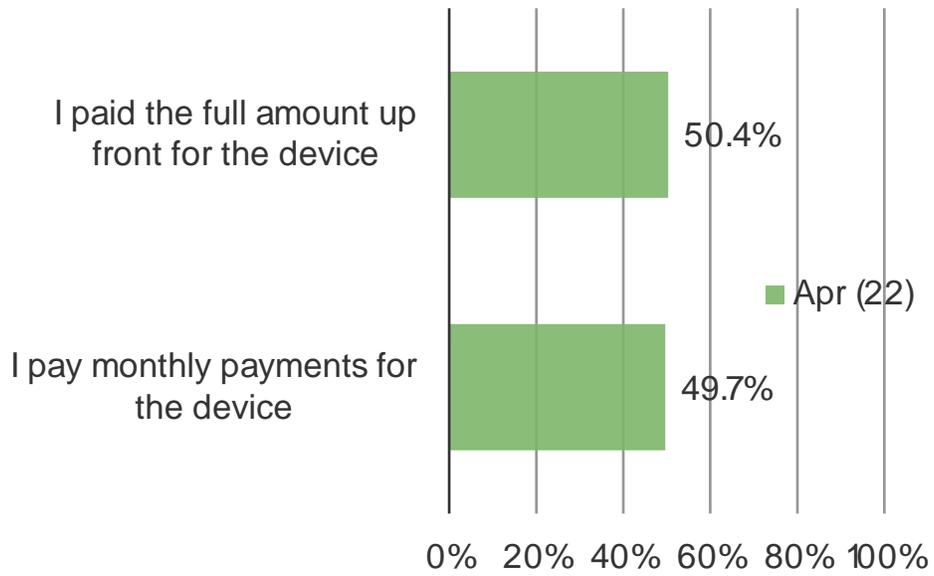
HOW DID YOU PURCHASE YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



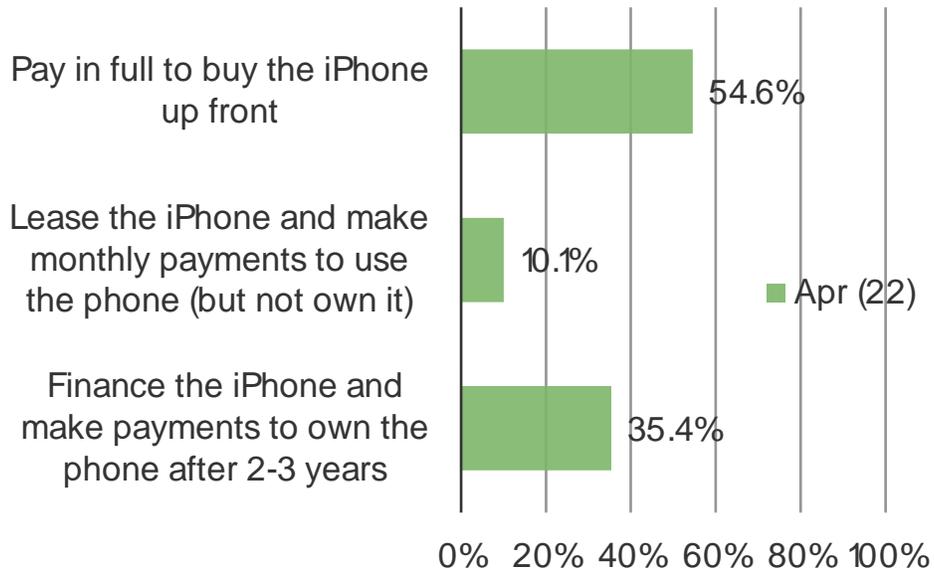
WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU PURCHASED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.

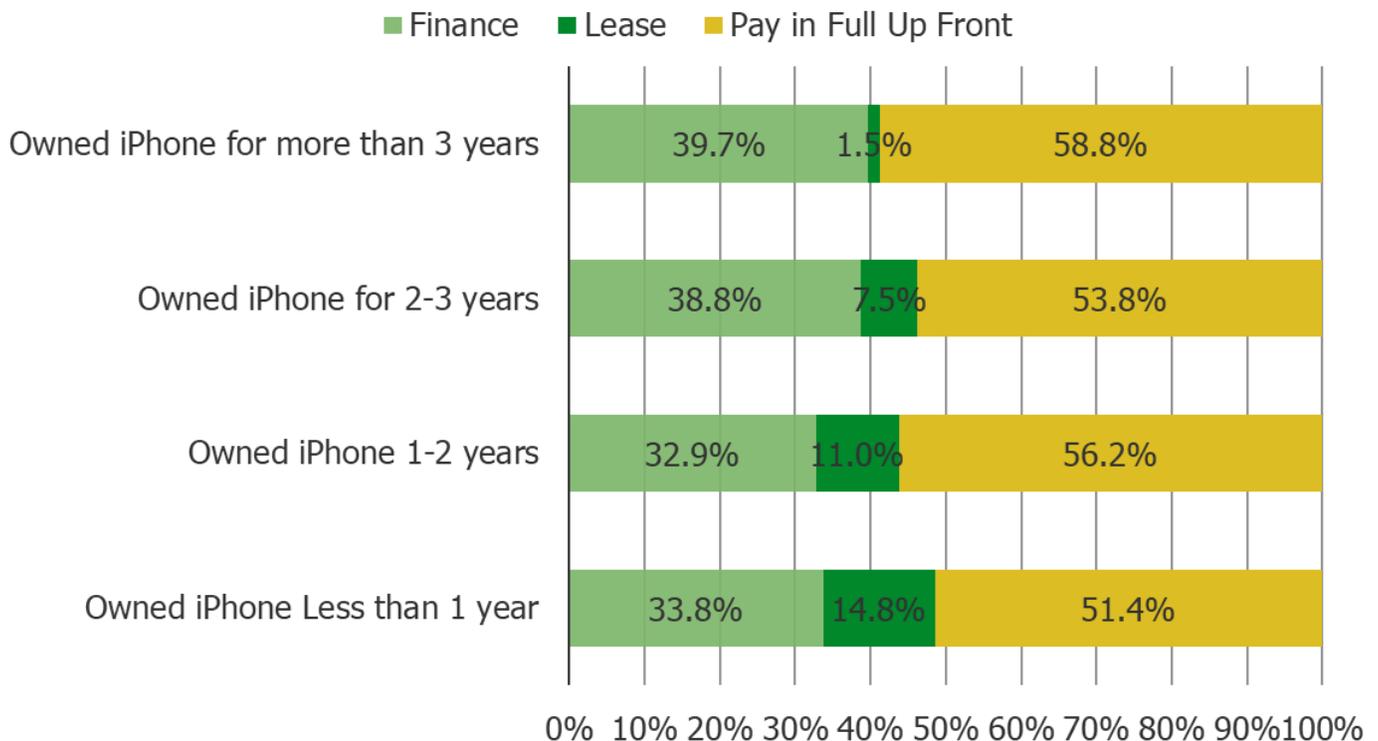


WHICH OF THE FOLLOWING DO YOU THINK WOULD BE A BETTER WAY TO HAVE AN IPHONE?

This question was posed to iPhone owners.

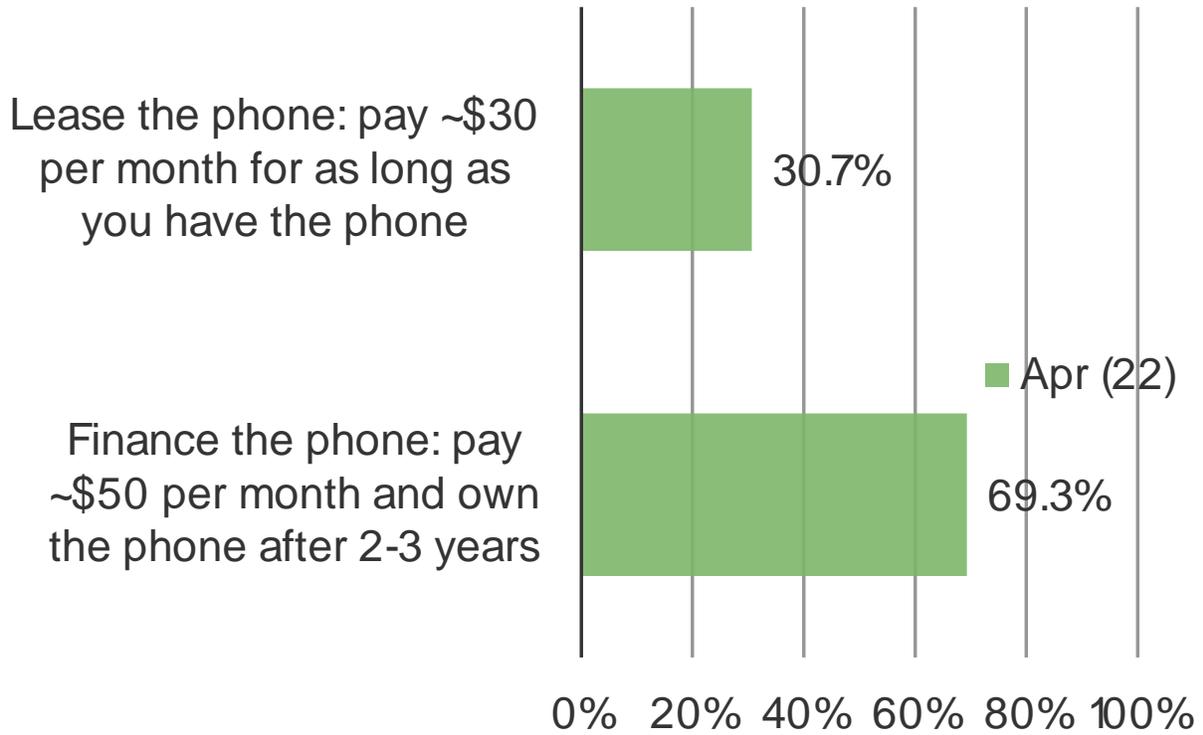


Cross-tabbing the data by how long they have owned their current iPhone.



IMAGINE A NEW IPHONE COMES OUT AND YOU WANTED TO GET IT, WHICH WOULD YOU BE MORE LIKELY TO CHOOSE?

This question was posed to iPhone owners.

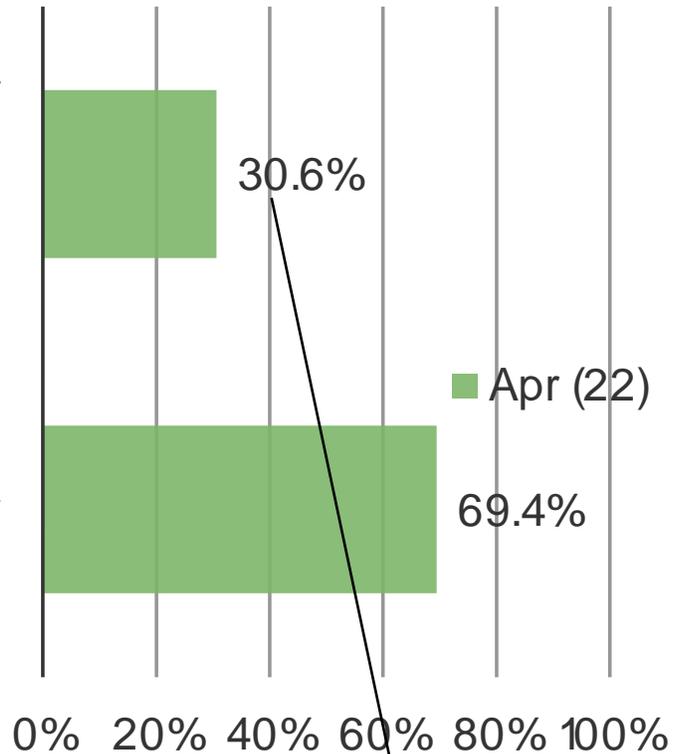


IMAGINE A NEW IPHONE COST ~\$50 PER MONTH TO FINANCE AND YOU WOULD OWN IT AFTER 2 YEARS. WHAT WOULD THE MONTHLY LEASE PRICE OF AN IPHONE HAVE TO BE FOR YOU TO DECIDE TO LEASE THE PHONE AND PAY THE MONTHLY PRICE FOR AS LONG AS YOU HAVE IT INSTEAD OF FINANCING IT TO OWN IT?

This question was posed to iPhone owners.

I would lease it at this dollar amount: Please just enter the number, do not include the \$ symbol.

I would not lease it at any price, I would always prefer to finance



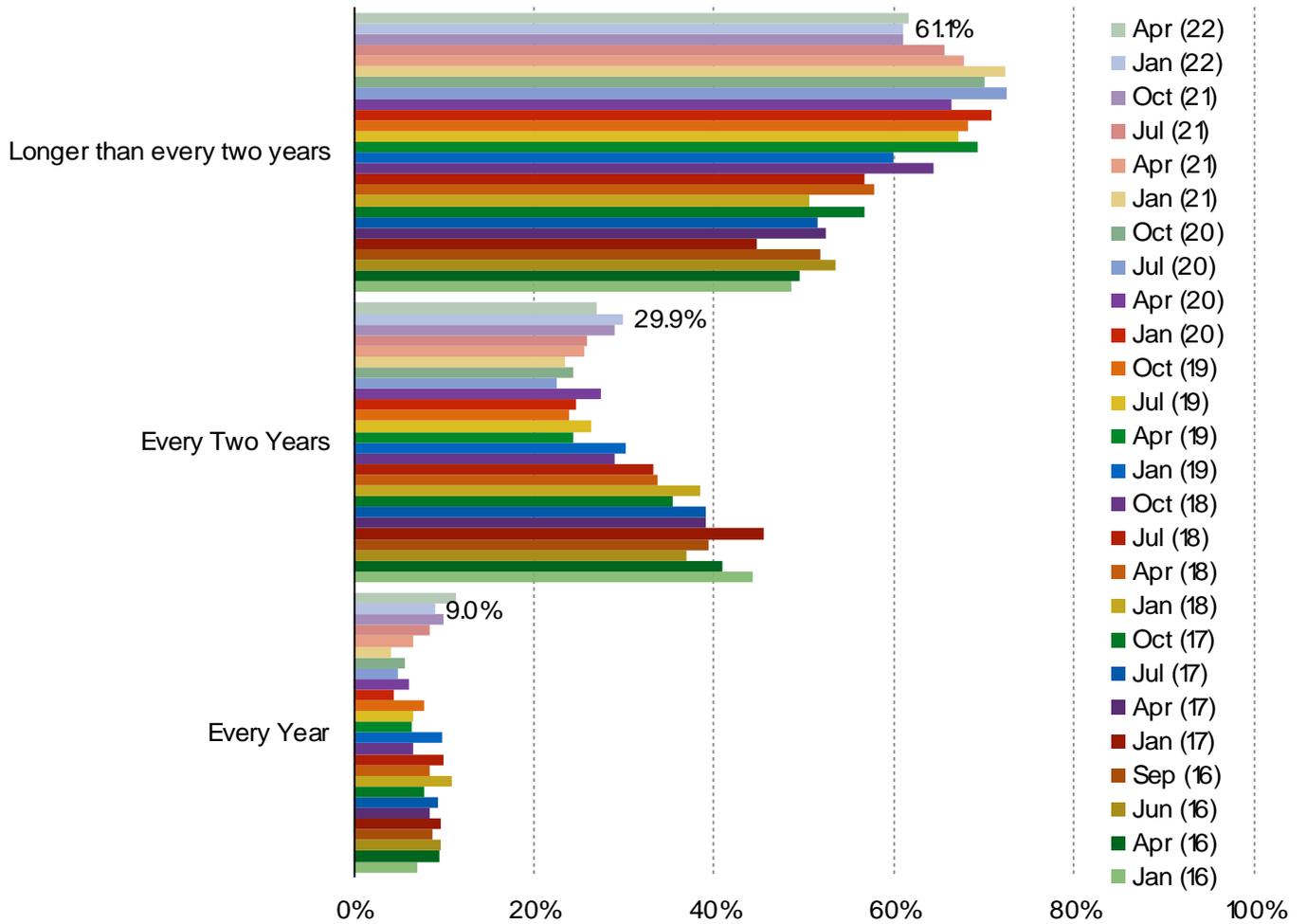
Median	\$25.00
Average	\$26.22

# SECTION 1: SMARTPHONE REFRESH CYCLES

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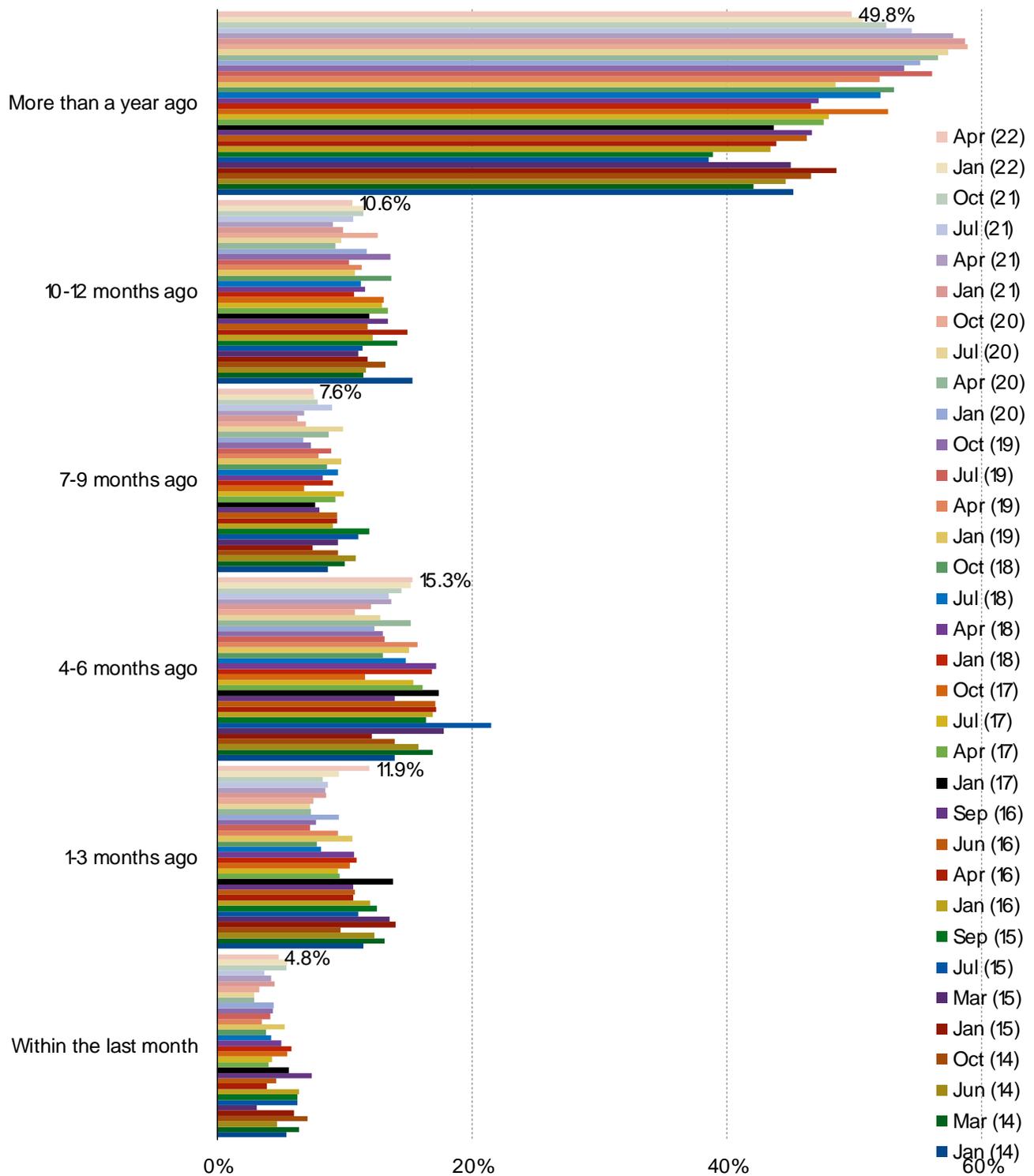
EXPECTATIONS FOR HOW FREQUENTLY CONSUMERS WILL PURCHASE NEW SMARTPHONES GOING FORWARD

This question was posed to smartphone owners.



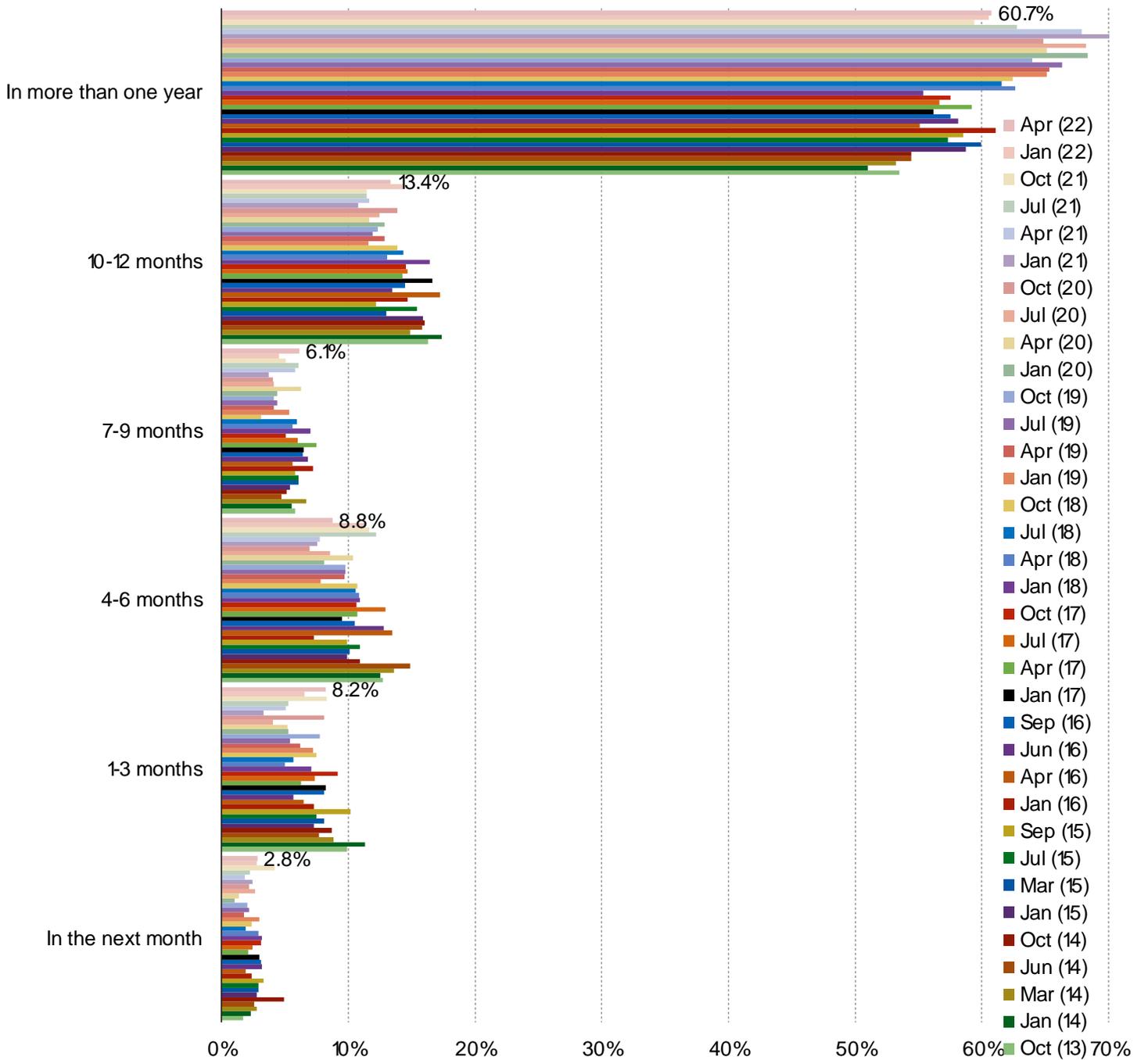
WHEN DID YOU GET YOUR CURRENT SMARTPHONE?

This question was posed to smartphone owners.



EXPECTED DATE OF NEXT SMARTPHONE PURCHASE

This question was posed to smartphone owners.

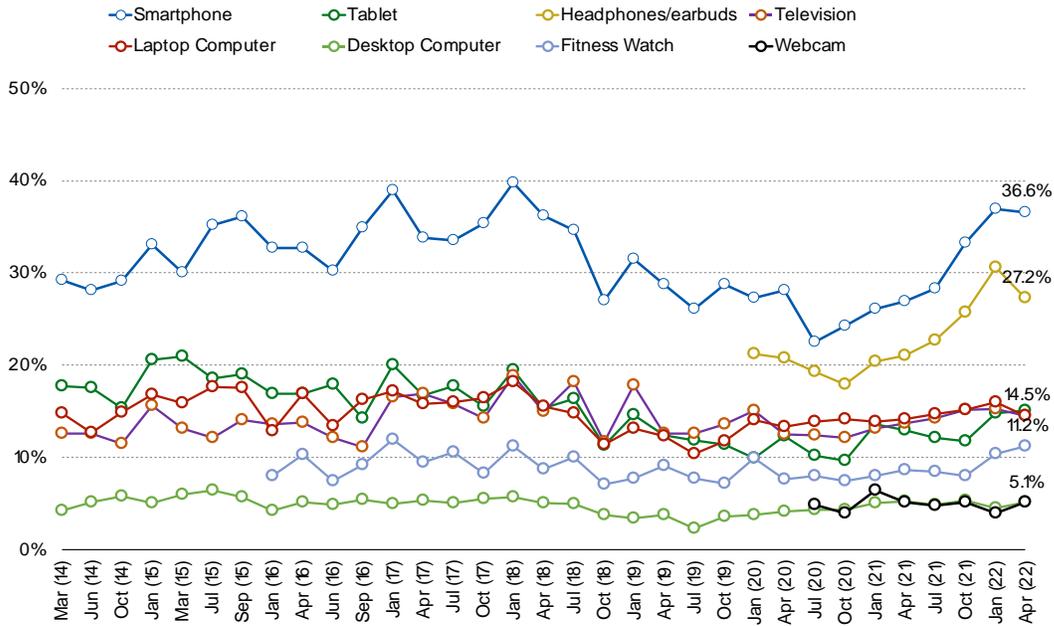


# SECTION 2: PURCHASE ENGAGEMENT

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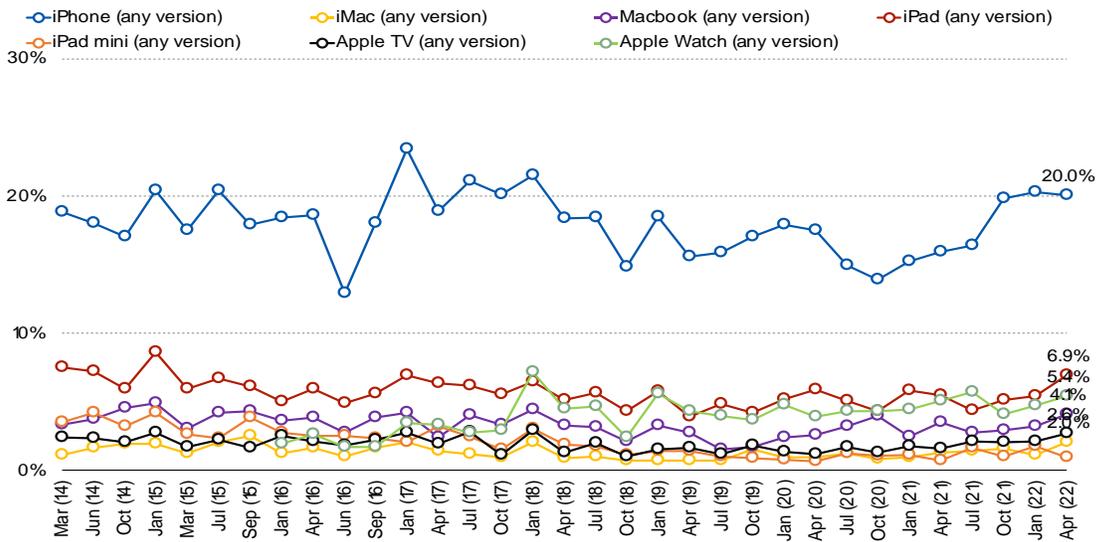
CONSUMER ELECTRONICS PURCHASES – PAST SIX MONTHS

This question was posed to all consumers.



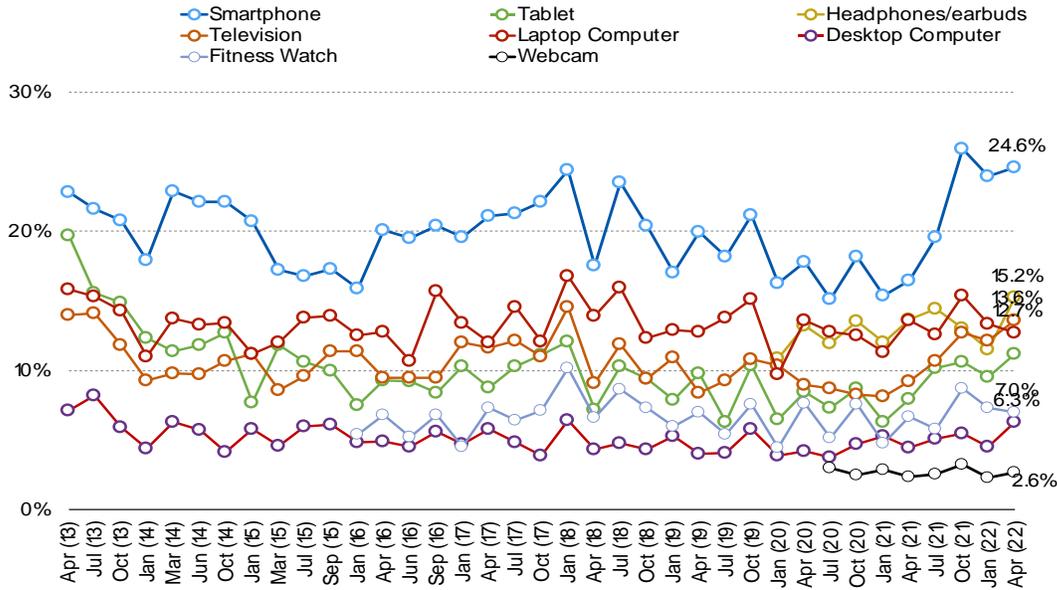
APPLE PRODUCT PURCHASES – PAST SIX MONTHS

This question was posed to all consumers.



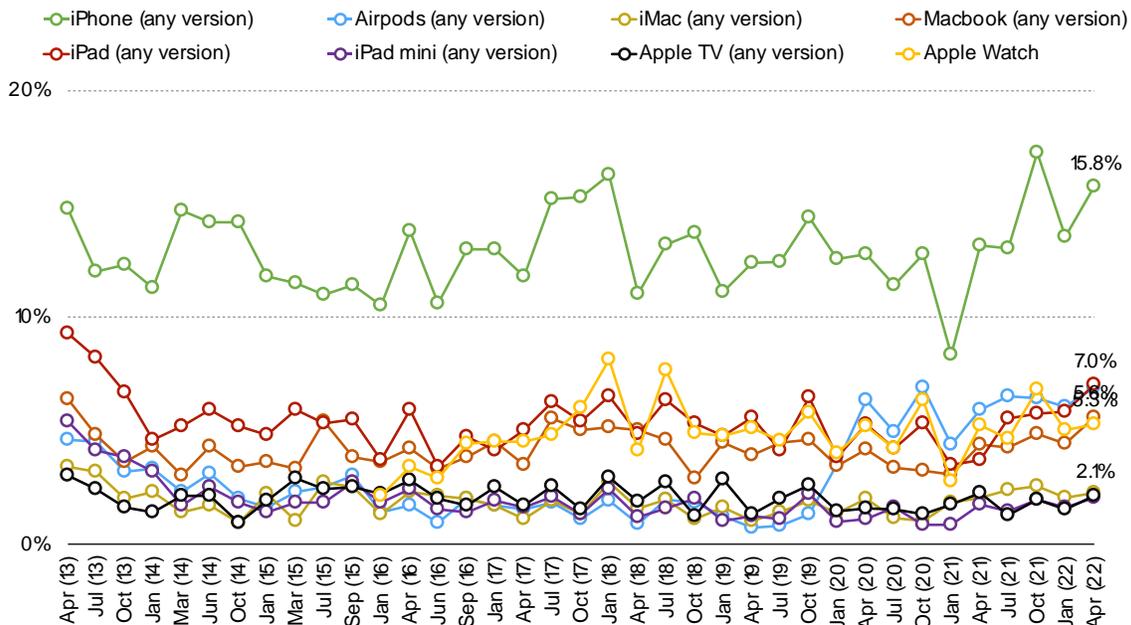
EXPECTED CONSUMER ELECTRONICS PURCHASES – NEXT FEW MONTHS

This question was posed to all consumers.



EXPECTED APPLE PRODUCT PURCHASES – NEXT FEW MONTHS

This question was posed to all consumers.

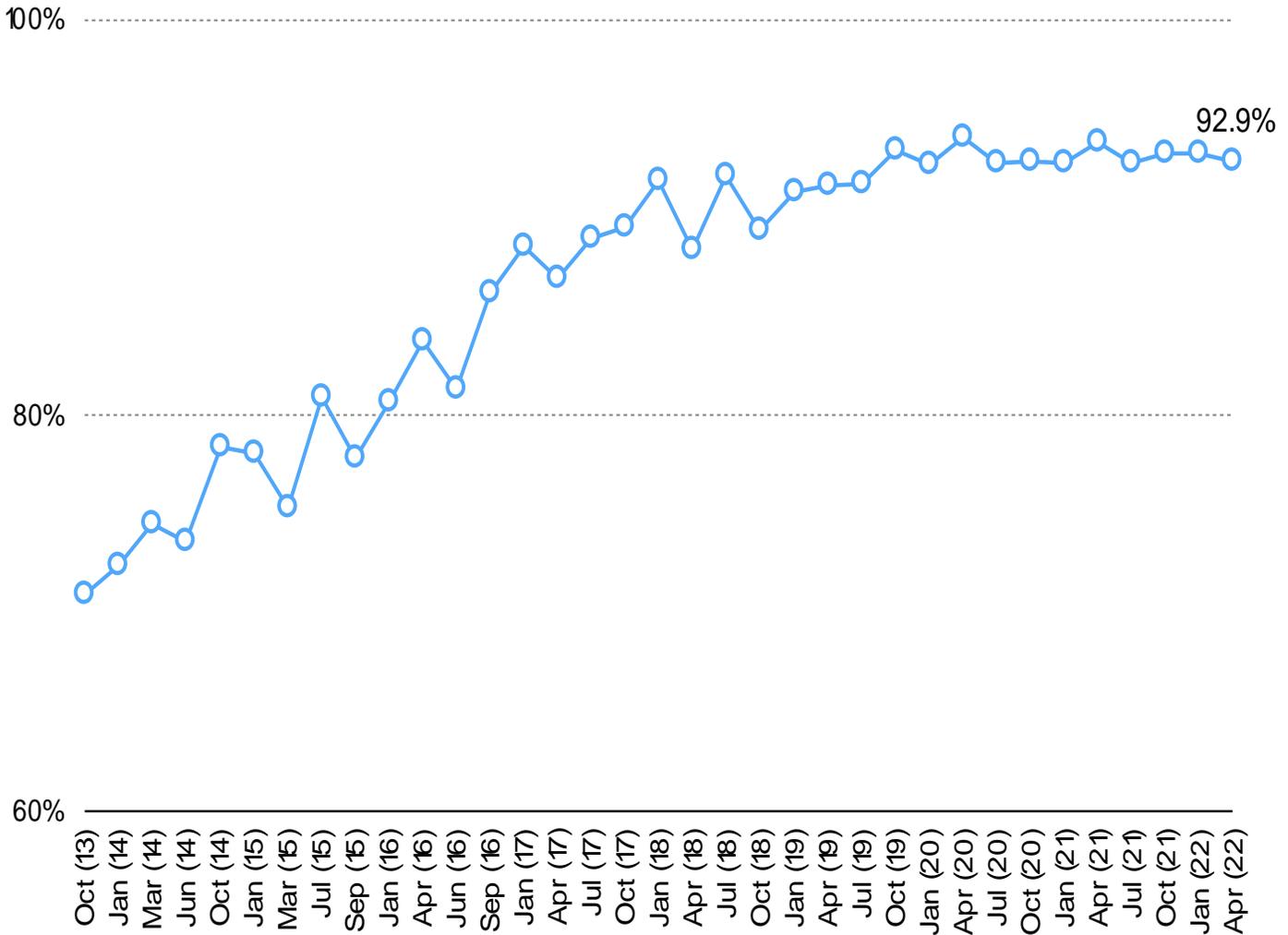


# SECTION 3: SMARTPHONE MARKET SHARE

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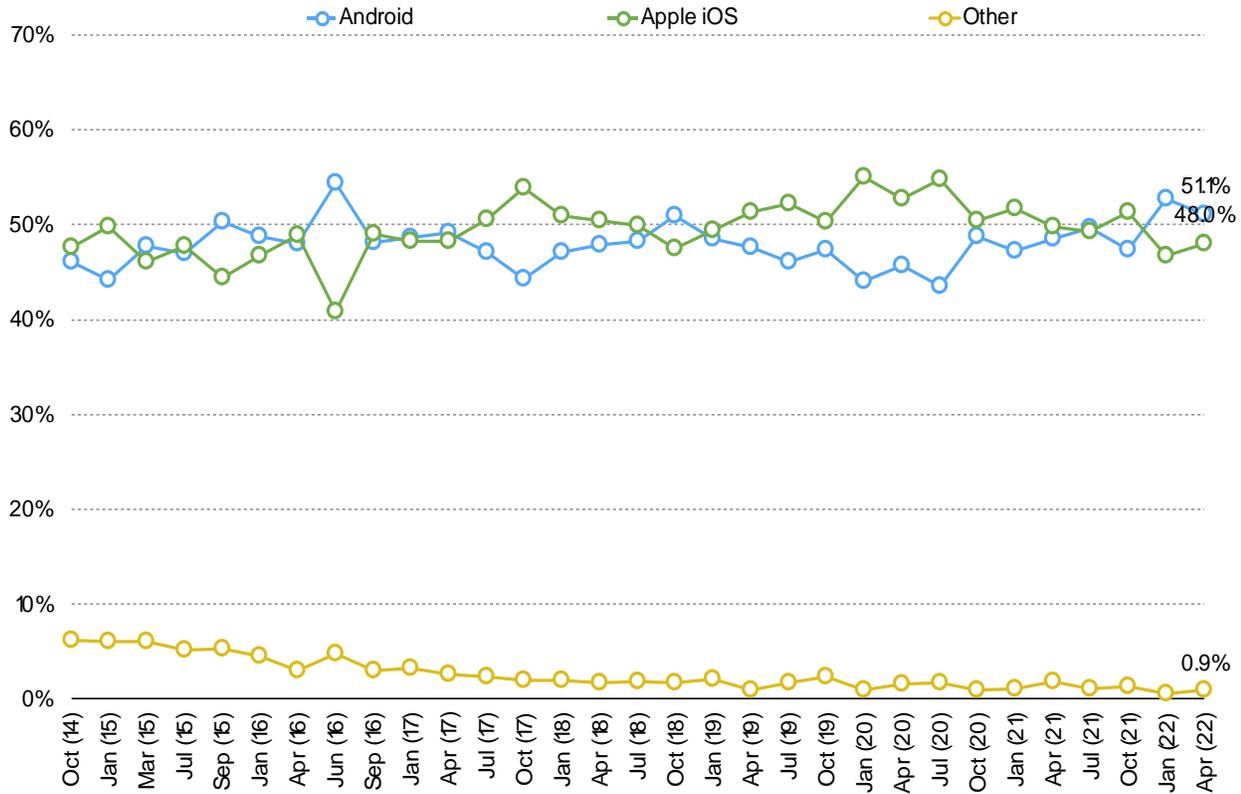
DO YOU OWN A SMARTPHONE?

This question was posed to all consumers.



CURRENT OPERATING SYSTEM FOR SMARTPHONE

This question was posed to smartphone owners.



## WHY DON'T YOU OWN AN IPHONE? (IE, WHY DID YOU CHOOSE AN ANDROID PHONE INSTEAD)?

This question was posed to Android owners.

Apple is the worst

Apple costs over Android not worth it

I don't care for apple phones and i don't like the apple company in general

More user friendly

It serves my needs perfectly

COST

prefer not to use apple products

Apple is too expensive. Android is easy to use.

I can afford the android, and I am familiar with how it works

Apple products, while more 'American' made are WAAAAY overpriced!

I found iPhone and iPad not user friendly - settings is not intuitive like it is on

Android. I prefer the style of my Samsung, and I have always disliked that

Apple forces users to use its suite of apps, addons, music, etc.

I don't own any other Apple devices; I am used to Android

I don't like Apple - company too large and already controls the industry

When I originally signed up to get my first cell phone, I was only offered

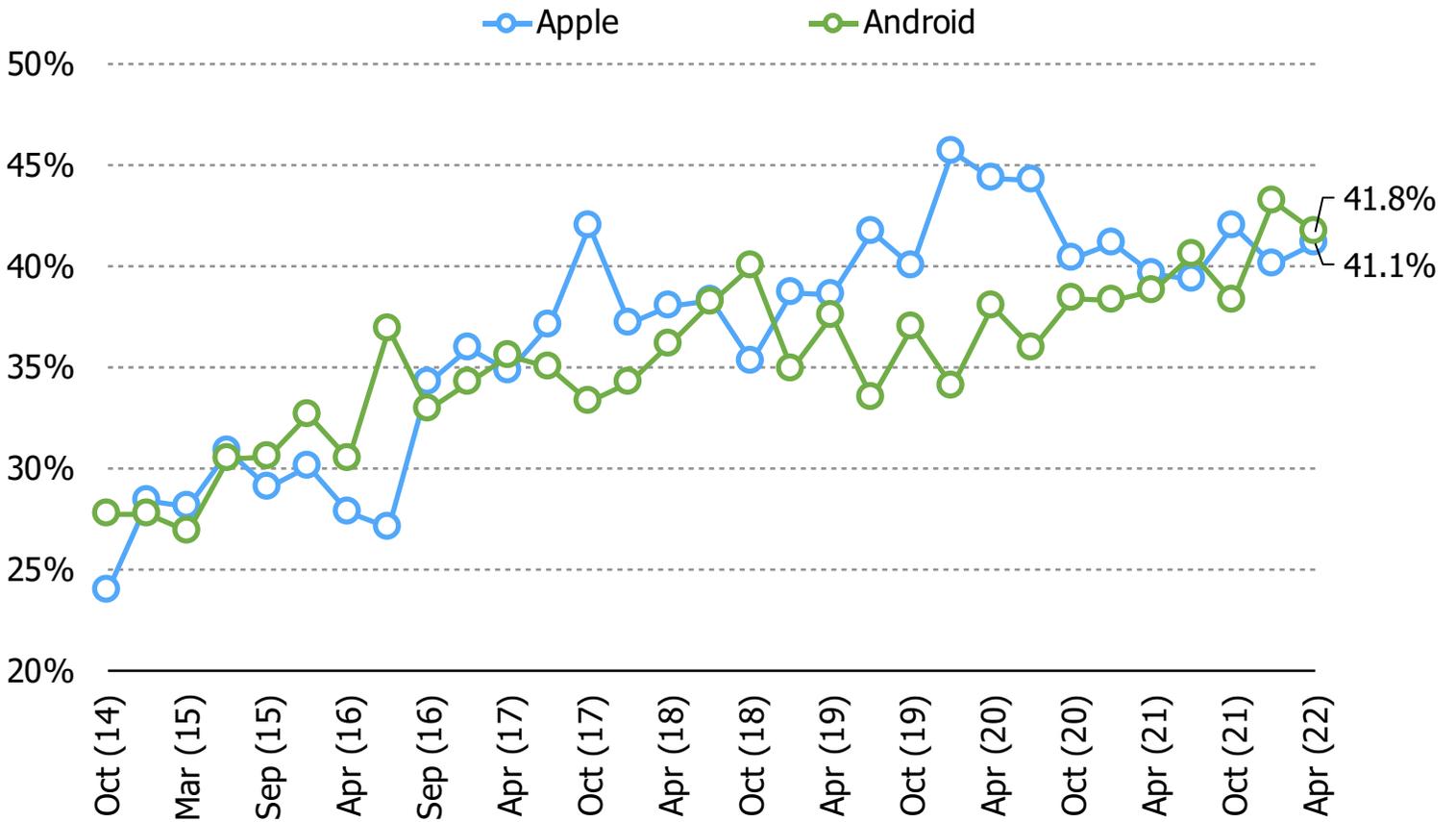
Samsung, that that's all I ever have been offered

Easier to use

Apple products are not user friendly

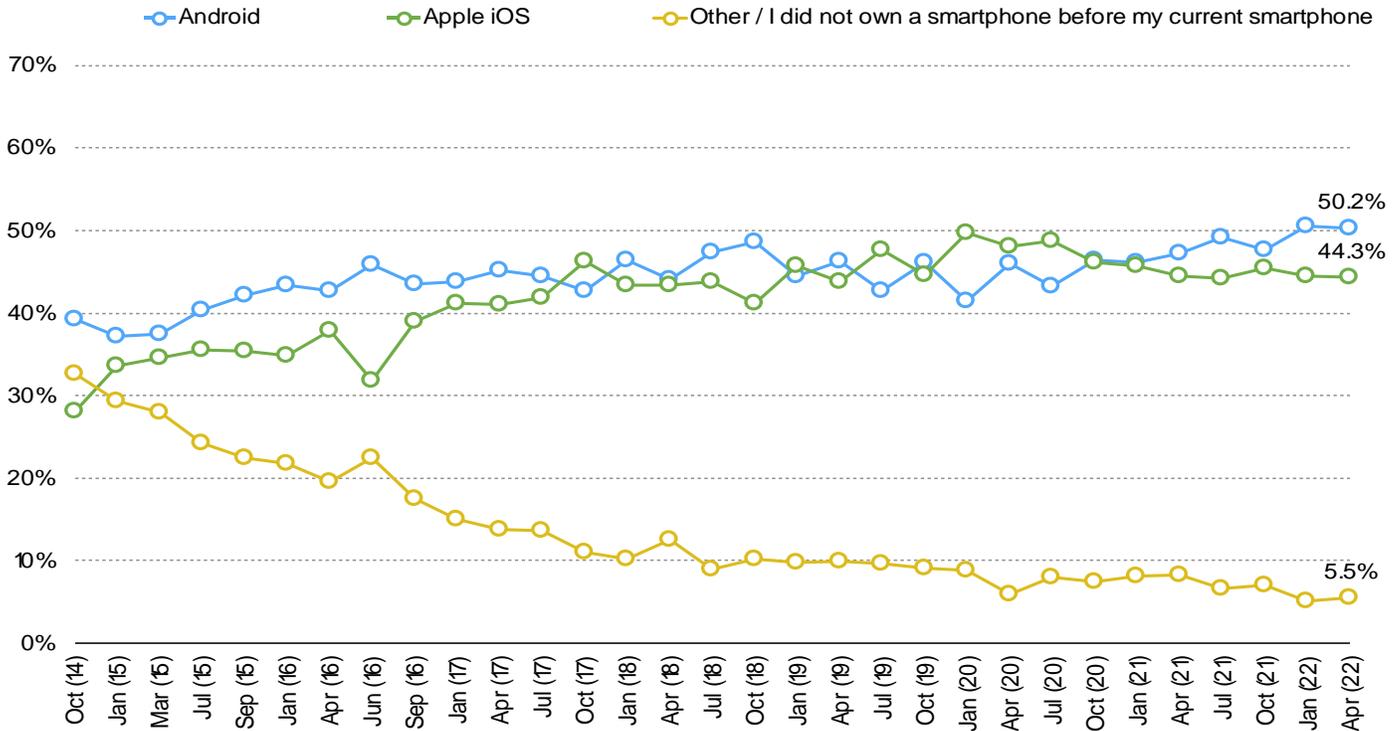
**“TRIPLE PLAYS” – PERCENTAGE OF SMARTPHONE OWNERS WHO OWN THE SAME OPERATING SYSTEM FOR LAST PHONE, CURRENT PHONE, AND PLAN TO USE SAME FOR NEXT PHONE**

This question was posed to smartphone owners.



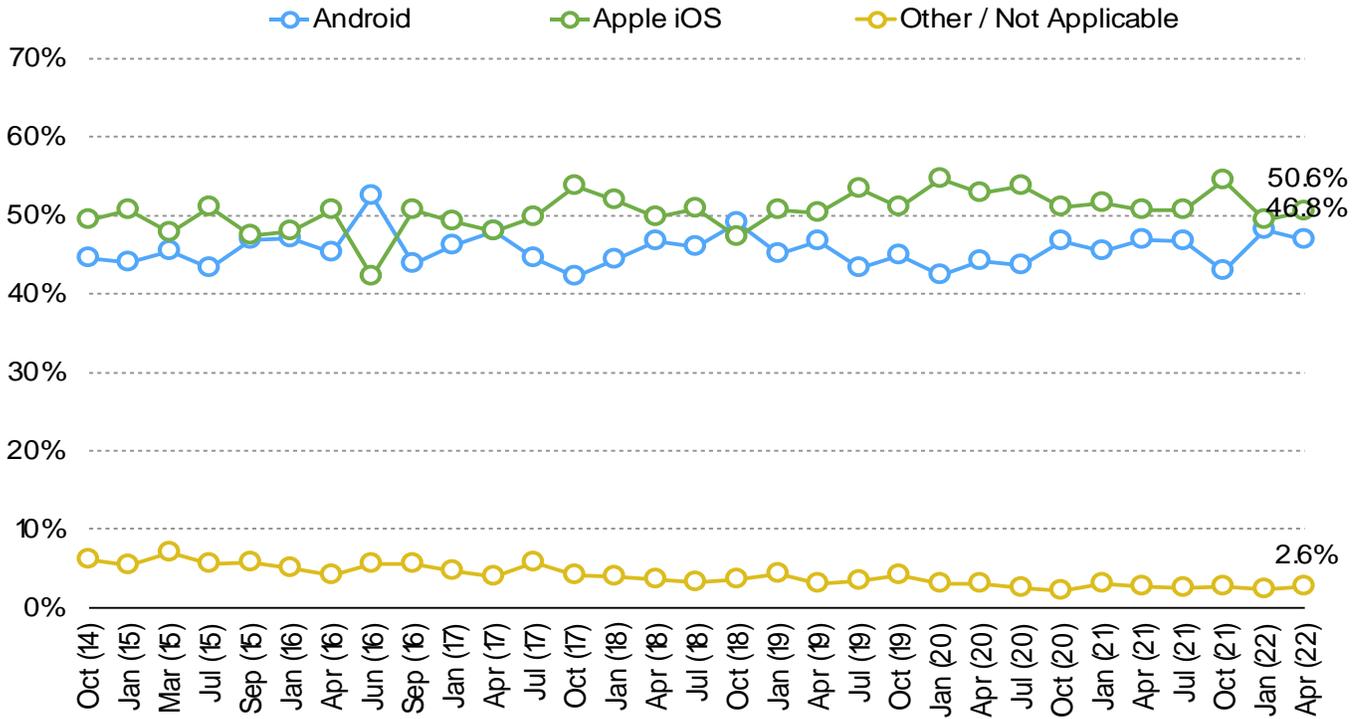
OPERATING SYSTEM FOR SMARTPHONE BEFORE CURRENT SMARTPHONE

This question was posed to smartphone owners.



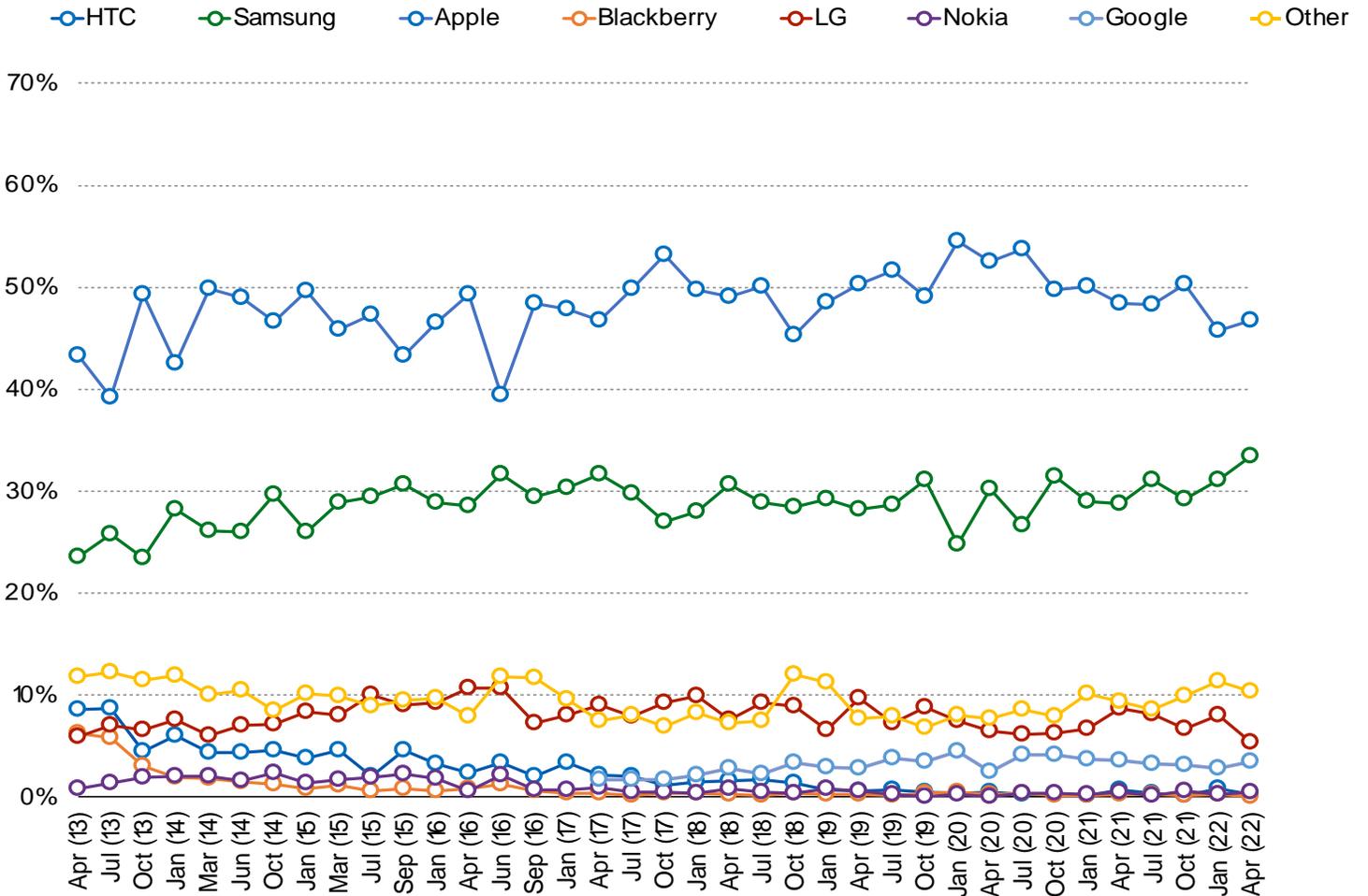
OPERATING SYSTEM FOR NEXT SMARTPHONE

This question was posed to smartphone owners.



MARKET SHARE - SMARTPHONES

This question was posed to smartphone owners.

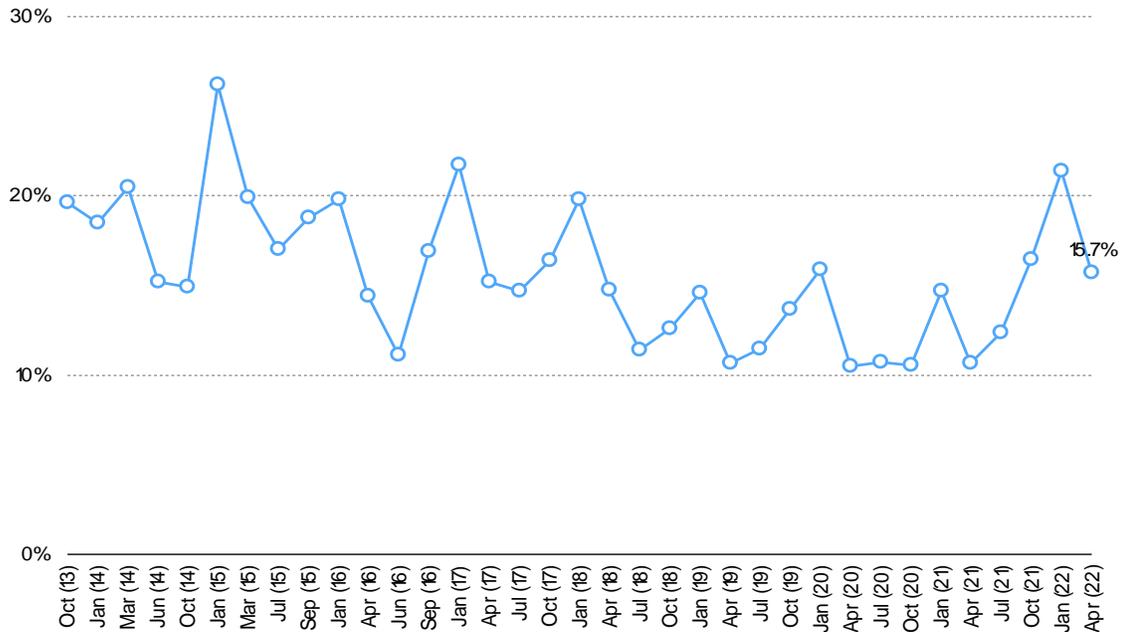


# SECTION 4: IPHONE DYNAMICS

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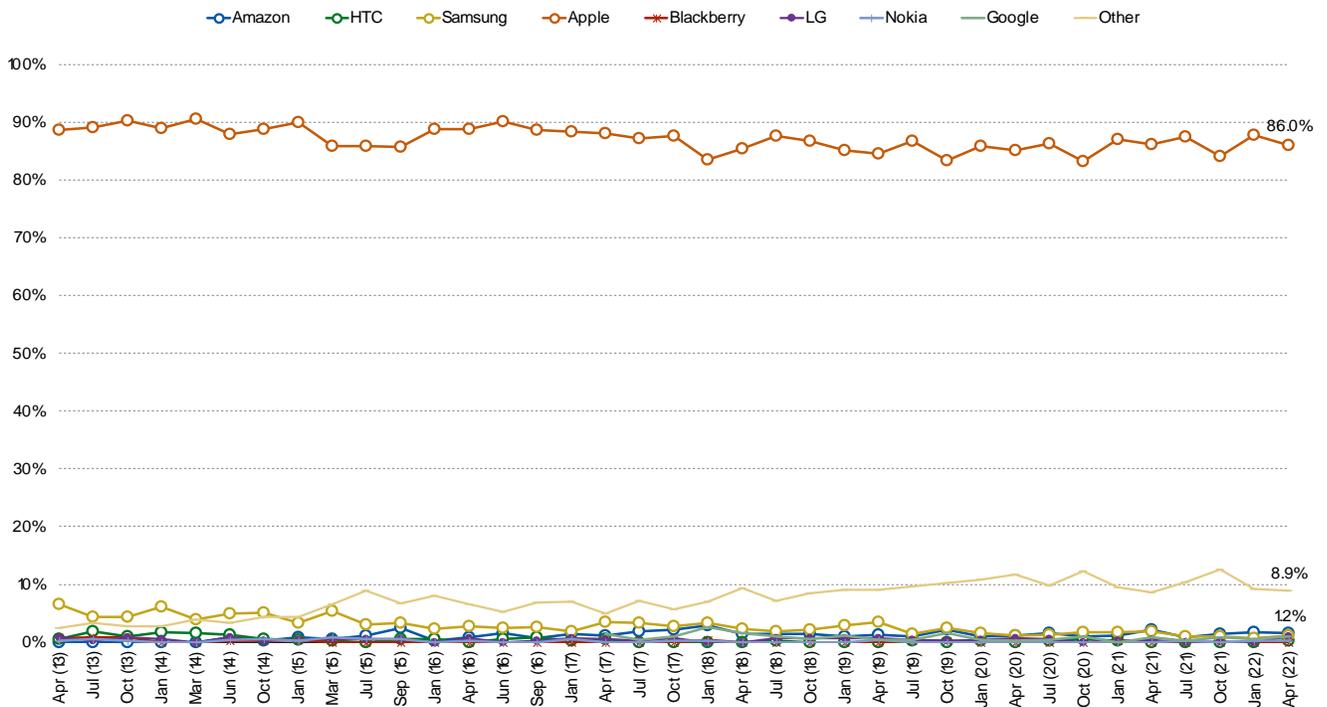
GOT IPHONE WITHIN PAST THREE MONTHS

This question was posed to iPhone owners.



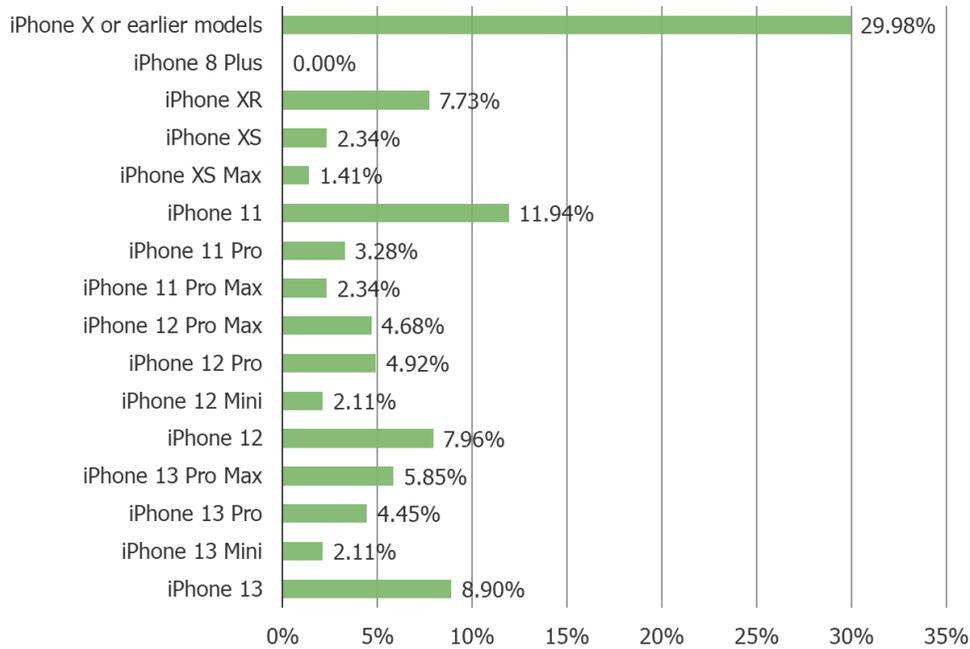
WHICH SMARTPHONE DO YOU PLAN TO GET NEXT?

This question was posed to iPhone owners.

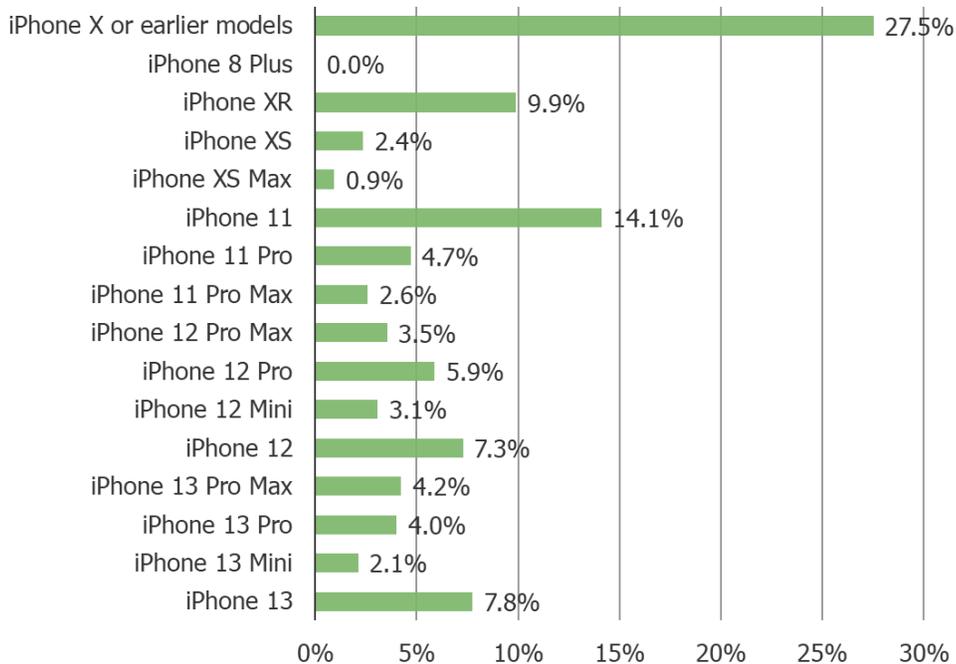


IPHONE MIX – WHICH MODEL DO YOU CURRENTLY OWN?

April 2022



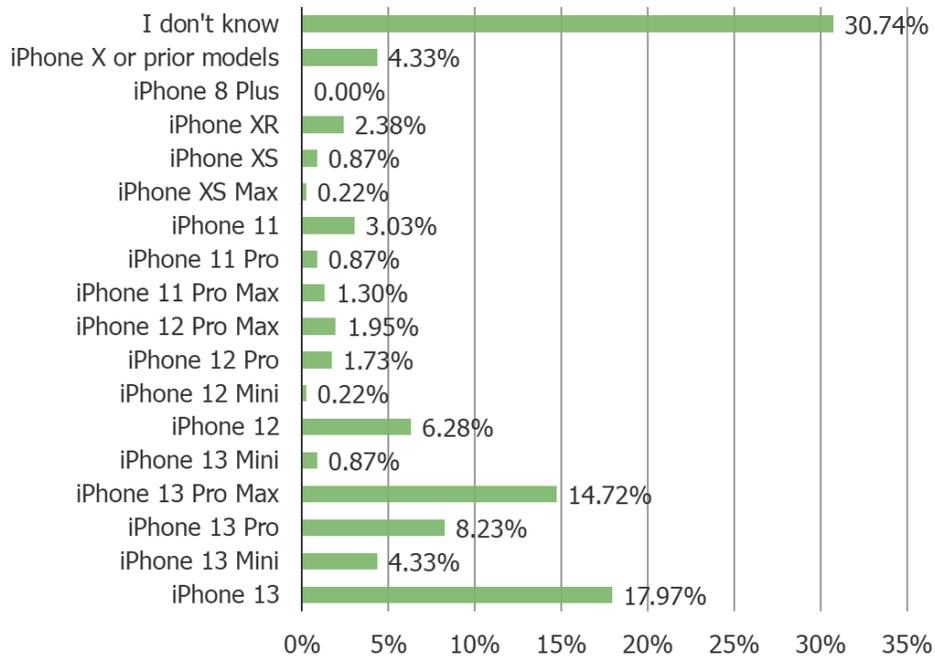
January 2022



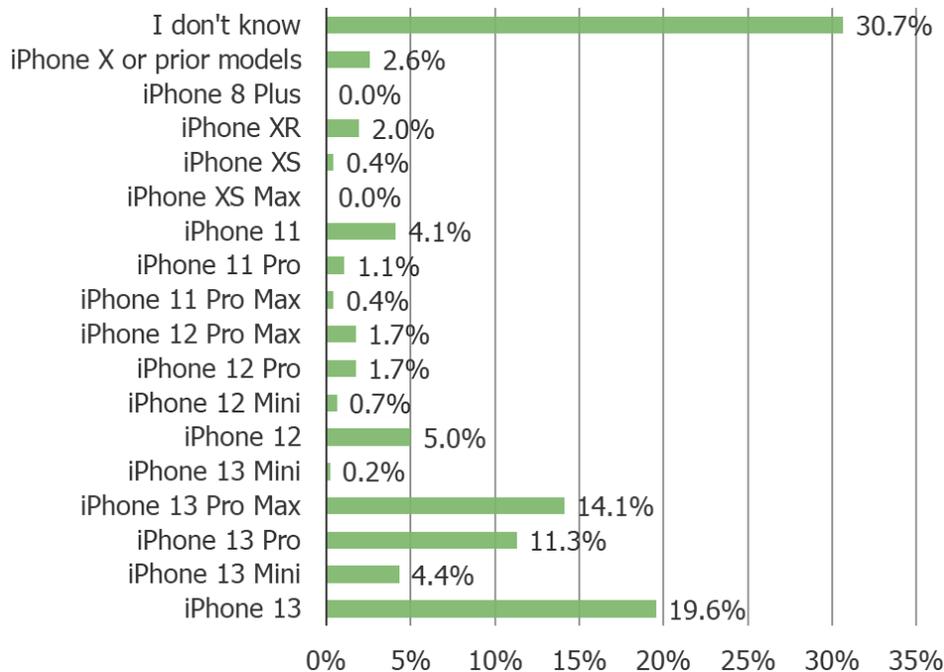
ALL SMARTPHONE OWNERS WHO PLAN TO GET AN IPHONE WHEN IT IS TIME TO GET A NEW SMARTPHONE – WHICH MODEL ARE YOU MOST LIKELY TO CHOOSE?

This question was posed to smartphone owners.

April 2022



January 2022

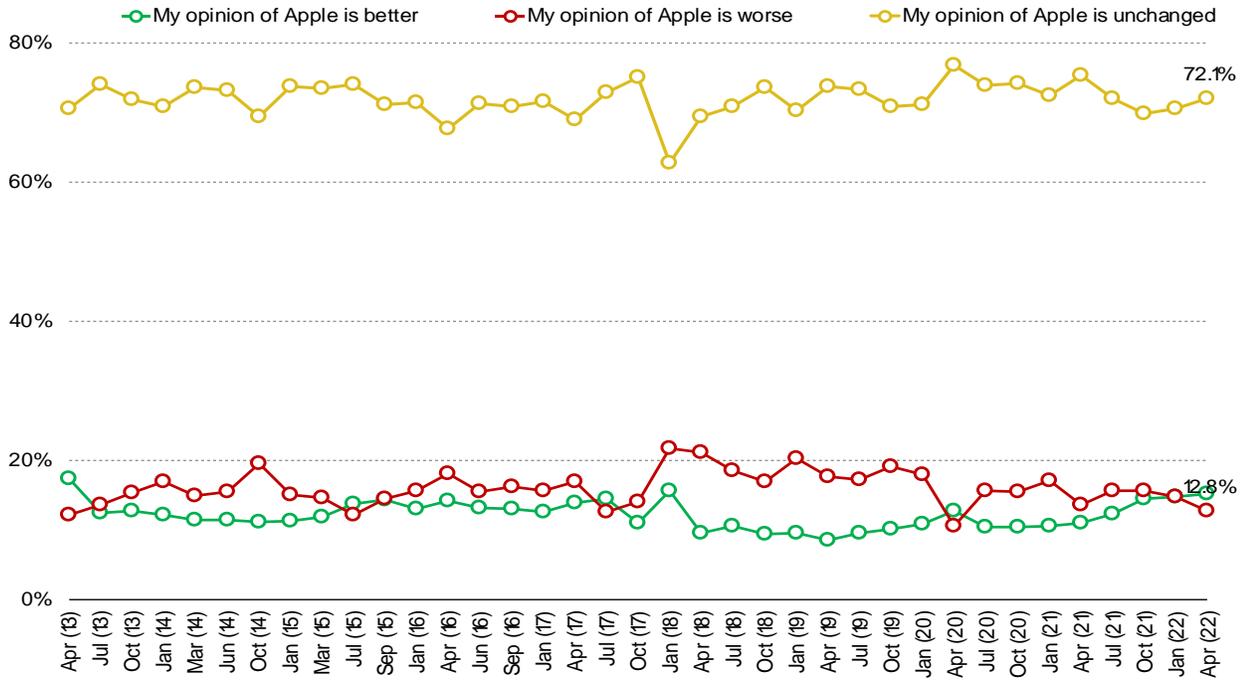


# SECTION 5: CONSUMER SENTIMENT

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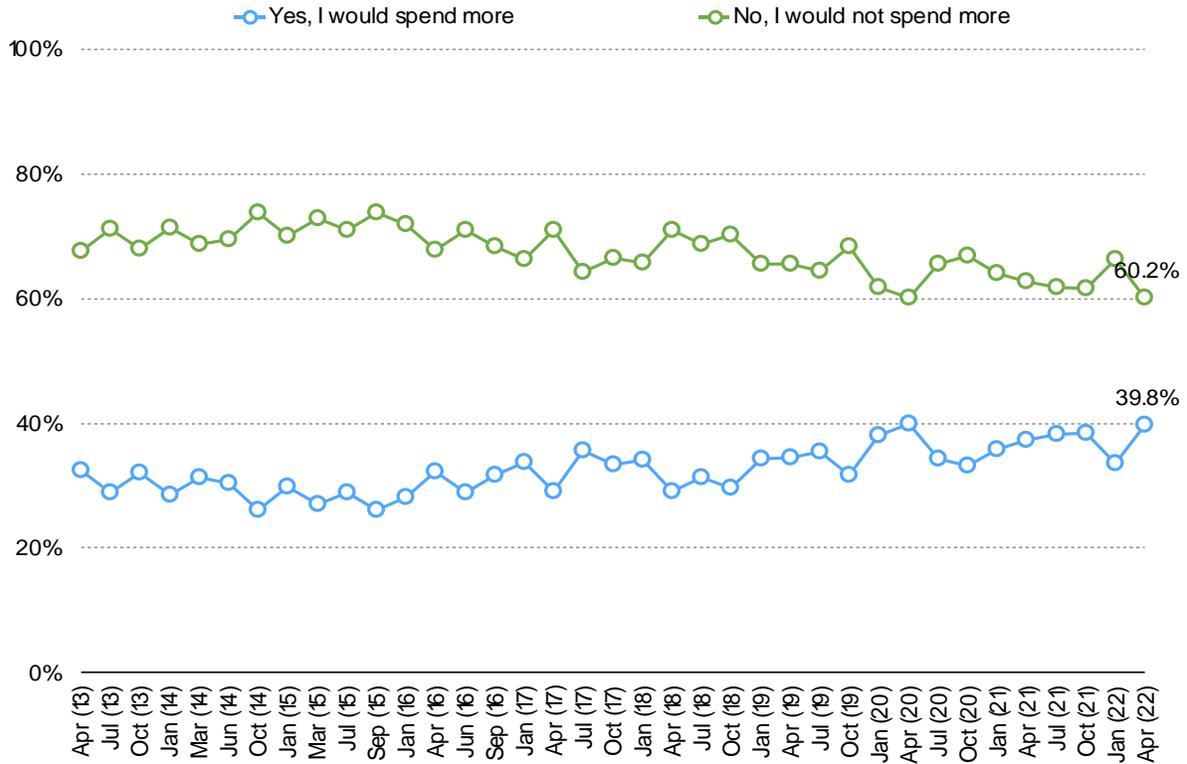
HAS YOUR OPINION OF APPLE CHANGED OVER THE PAST YEAR?

This question was posed to all respondents



IN GENERAL, WOULD YOU BE WILLING TO SPEND MORE MONEY FOR APPLE PRODUCTS THAN YOU WOULD FOR SIMILAR PRODUCTS FROM OTHERS?

This question was posed to all respondents

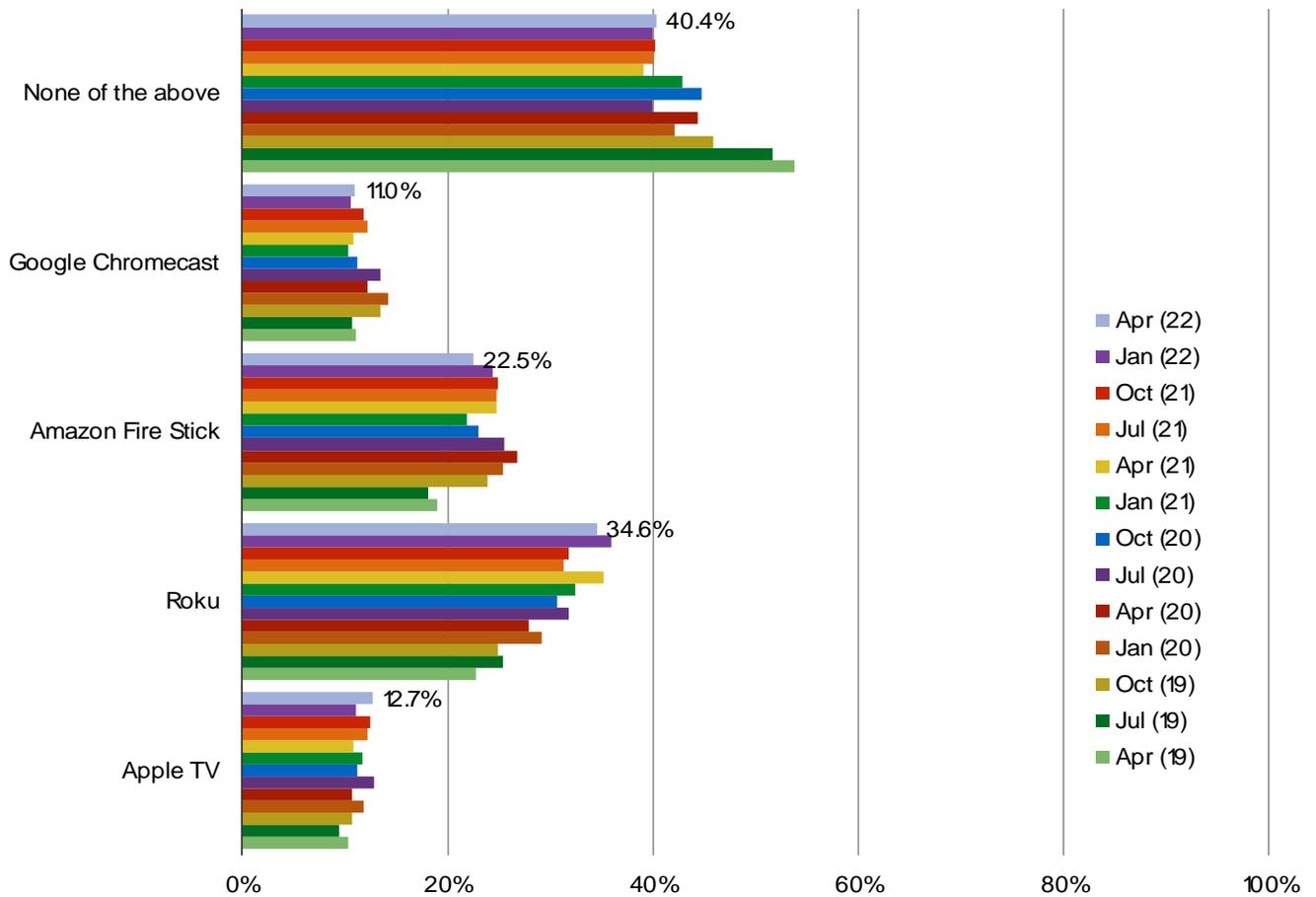


# SECTION 6: STREAMING PLAYERS

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DO YOU OWN ANY OF THE FOLLOWING STREAMING PLAYERS?

This question was posed to all consumers.



# SECTION 7: RETAILERS

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BOUGHT CONSUMER ELECTRONICS IN THE PAST SIX MONTHS – WHERE DID YOU BUY IT/THEM FROM?

