

CHECK BREAKDOWN:**TREND CHECKS****Smartphones – Refresh Cycles Improving Q/Q**

- Smartphone refresh cycles continue to improve wave to wave.
- The share who expect to replace their phones every year and every two years jumped to highs in recent survey history.
- This is a change from the longer term trend we had previously been observing in our survey series in which respondents have been significantly stretching out refresh cycle.s

Purchase Engagement

- Recent and expected consumer electronics purchases, including smartphones, are on the upswing.

Smartphone Share Dynamics

- Market share trends between Apple and Android have shifted in favor of Apple in recent quarters.

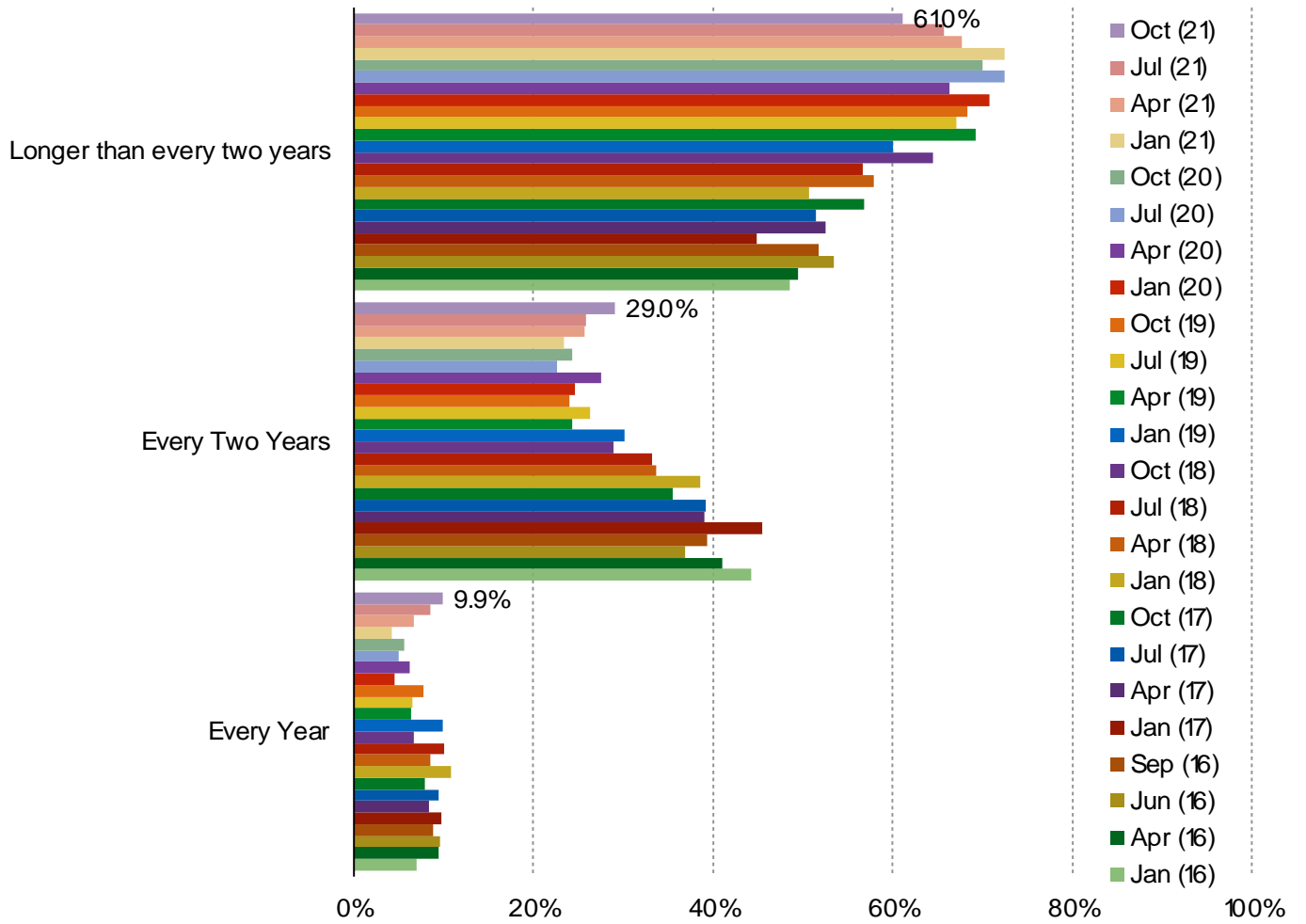
Consumer Electronics Purchases

- Amazon, Target, and GameStop exhibited strength in the last six months when it comes to recent consumer electronics purchases.

SECTION 1: SMARTPHONE REFRESH CYCLES

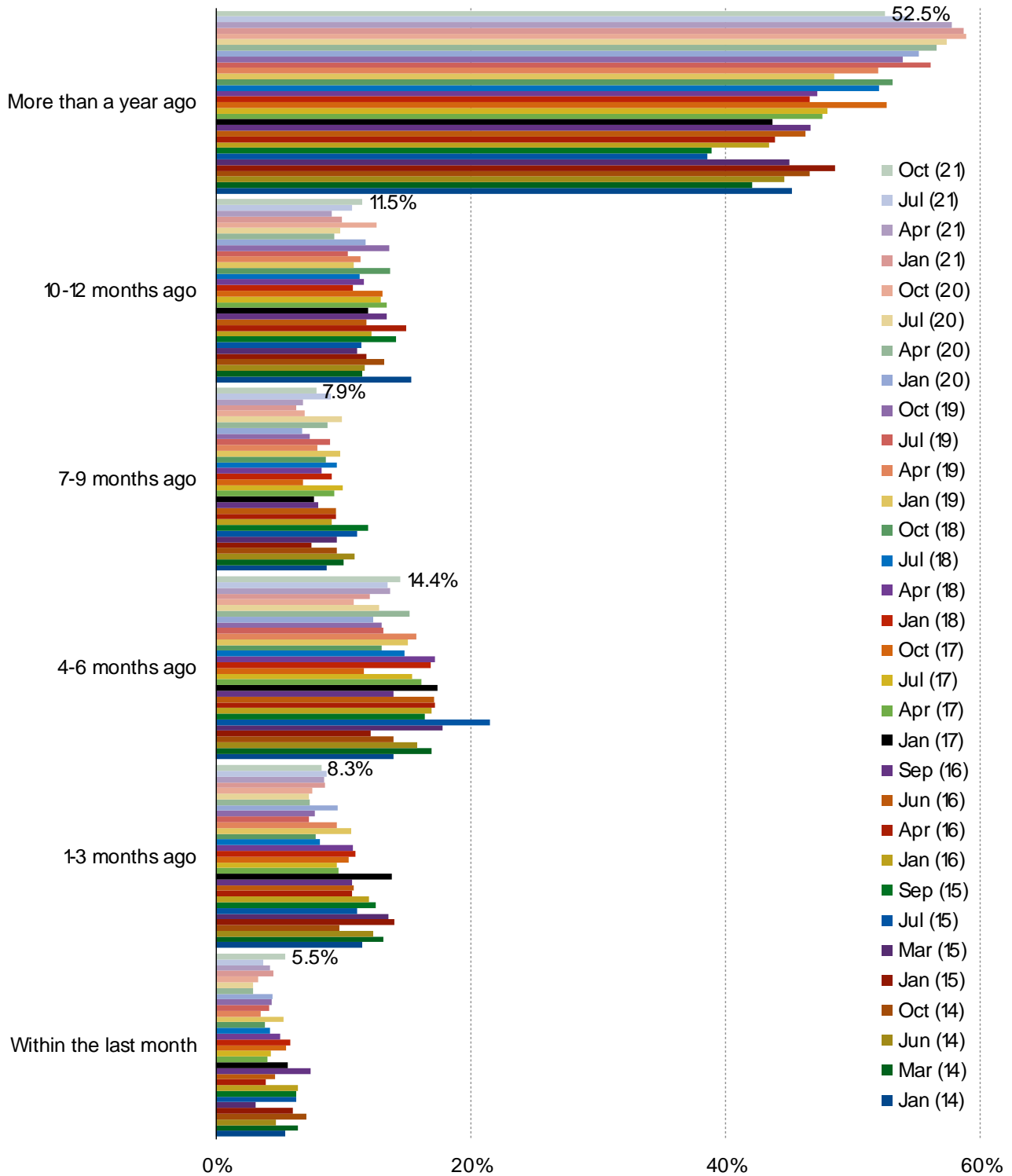
EXPECTATIONS FOR HOW FREQUENTLY CONSUMERS WILL PURCHASE NEW SMARTPHONES GOING FORWARD

This question was posed to smartphone owners.



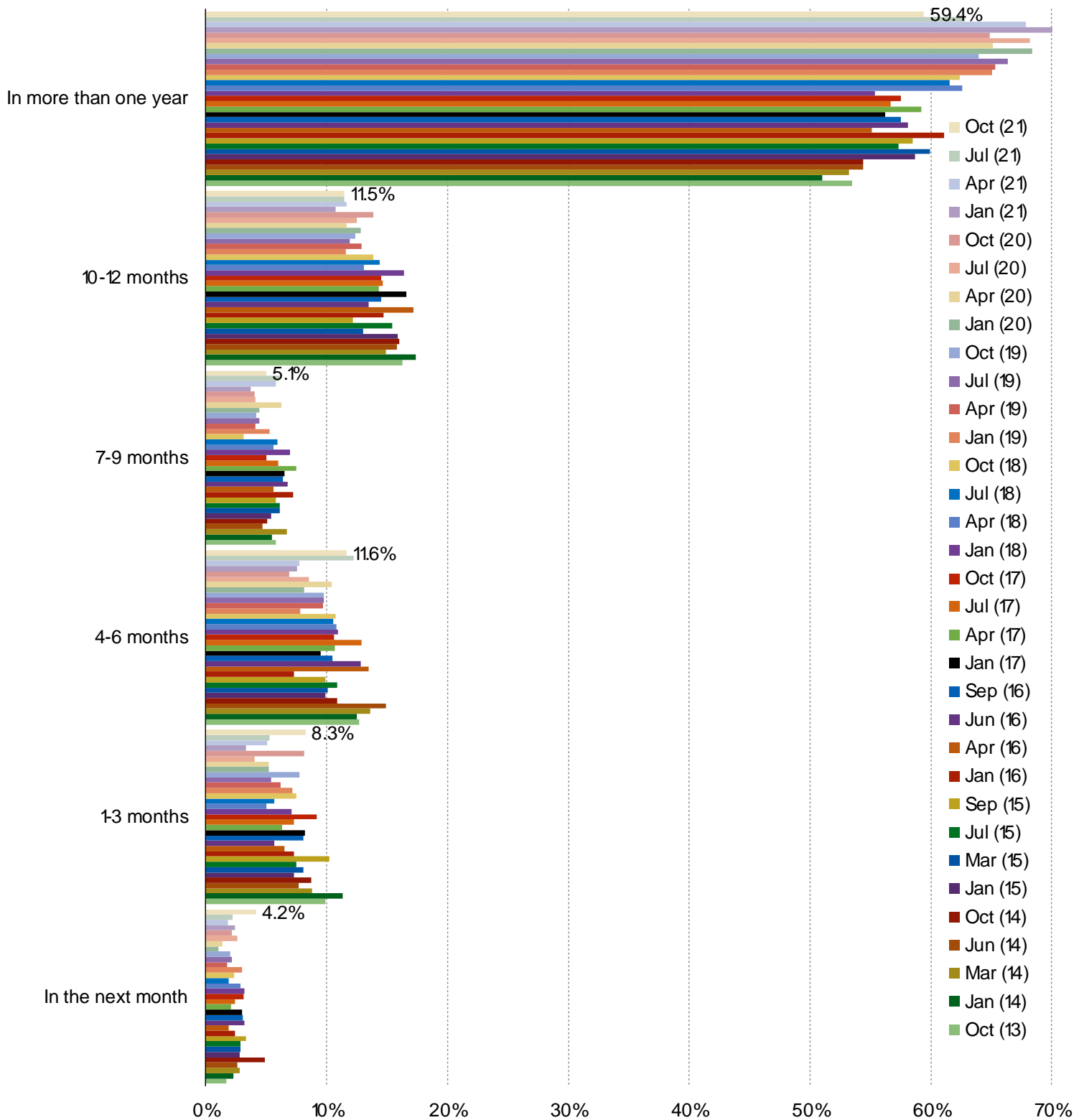
WHEN DID YOU GET YOUR CURRENT SMARTPHONE?

This question was posed to smartphone owners.



EXPECTED DATE OF NEXT SMARTPHONE PURCHASE

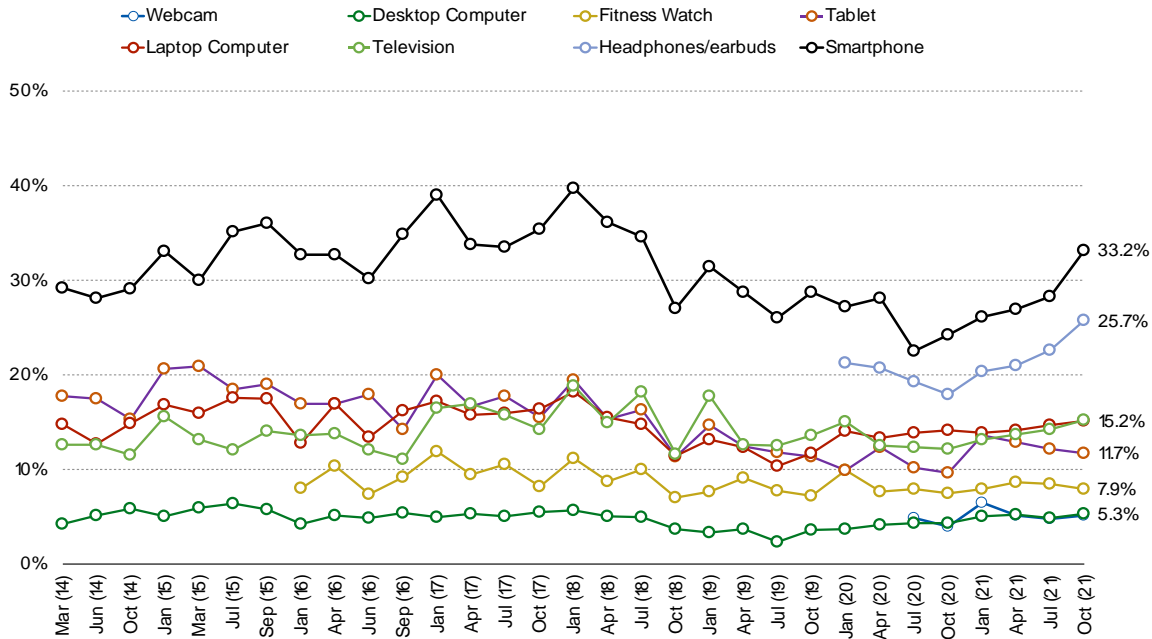
This question was posed to smartphone owners.



SECTION 2: PURCHASE ENGAGEMENT

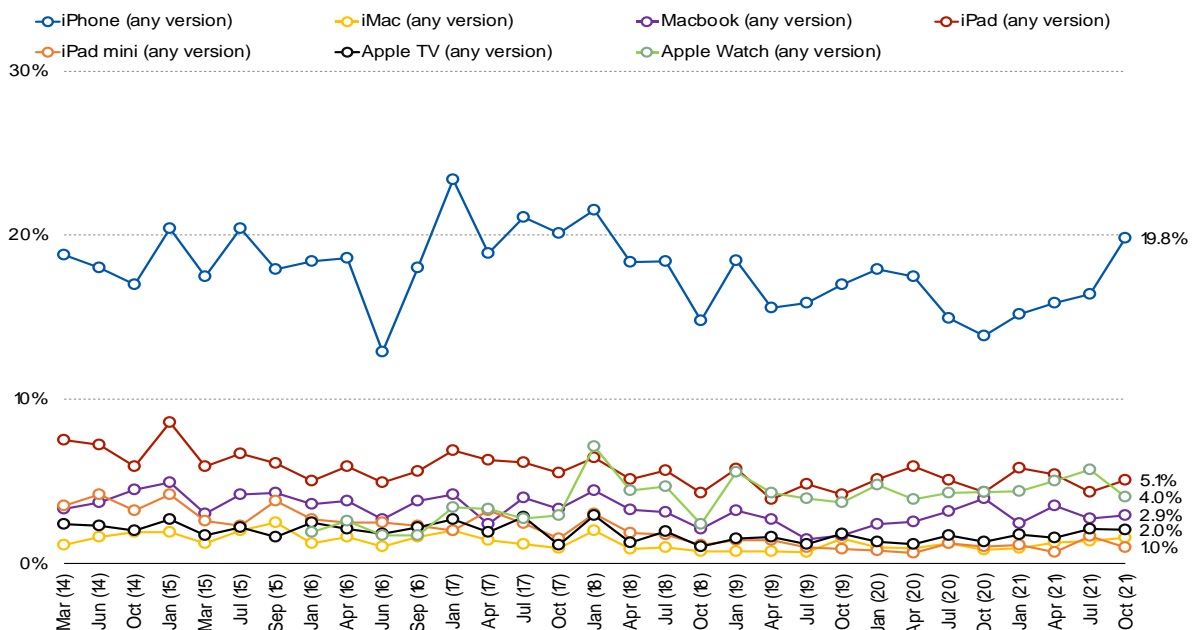
CONSUMER ELECTRONICS PURCHASES – PAST SIX MONTHS

This question was posed to all consumers.



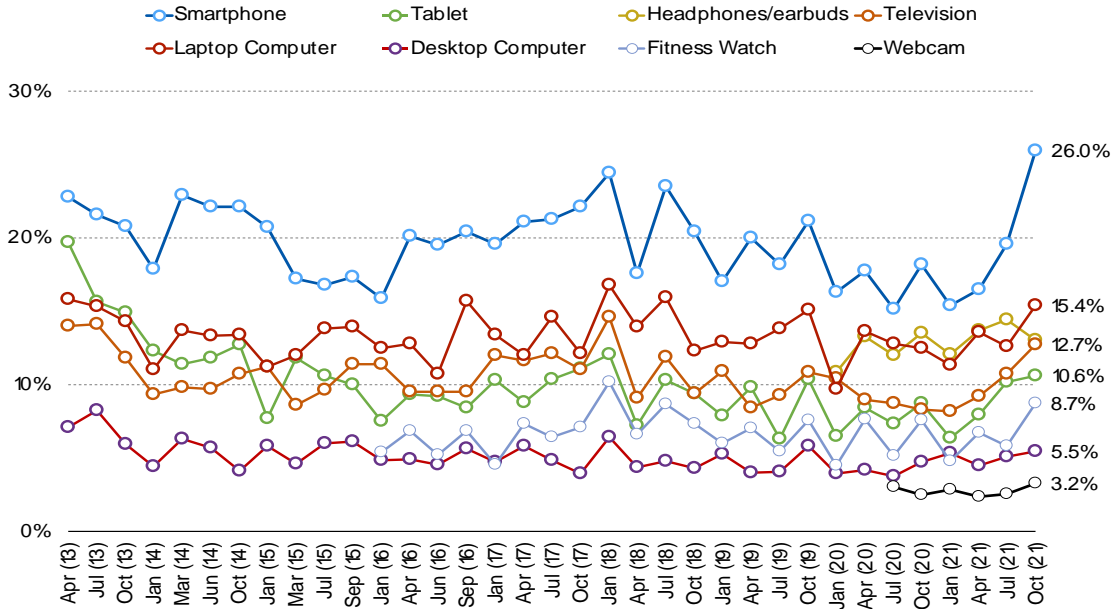
APPLE PRODUCT PURCHASES – PAST SIX MONTHS

This question was posed to all consumers.



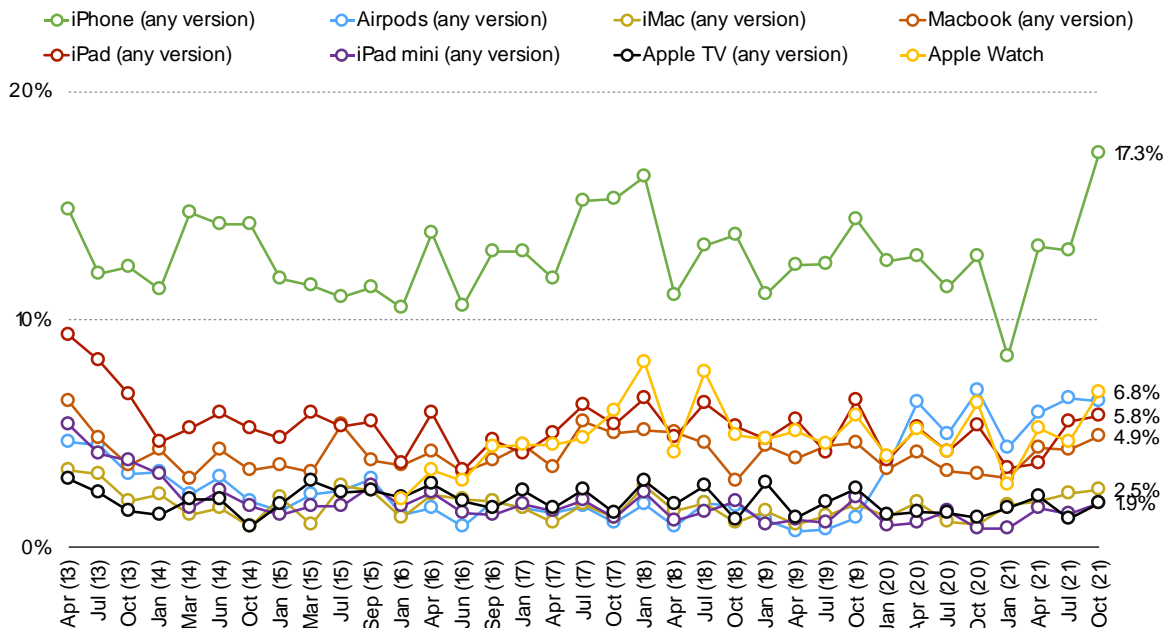
EXPECTED CONSUMER ELECTRONICS PURCHASES – NEXT FEW MONTHS

This question was posed to all consumers.



EXPECTED APPLE PRODUCT PURCHASES – NEXT FEW MONTHS

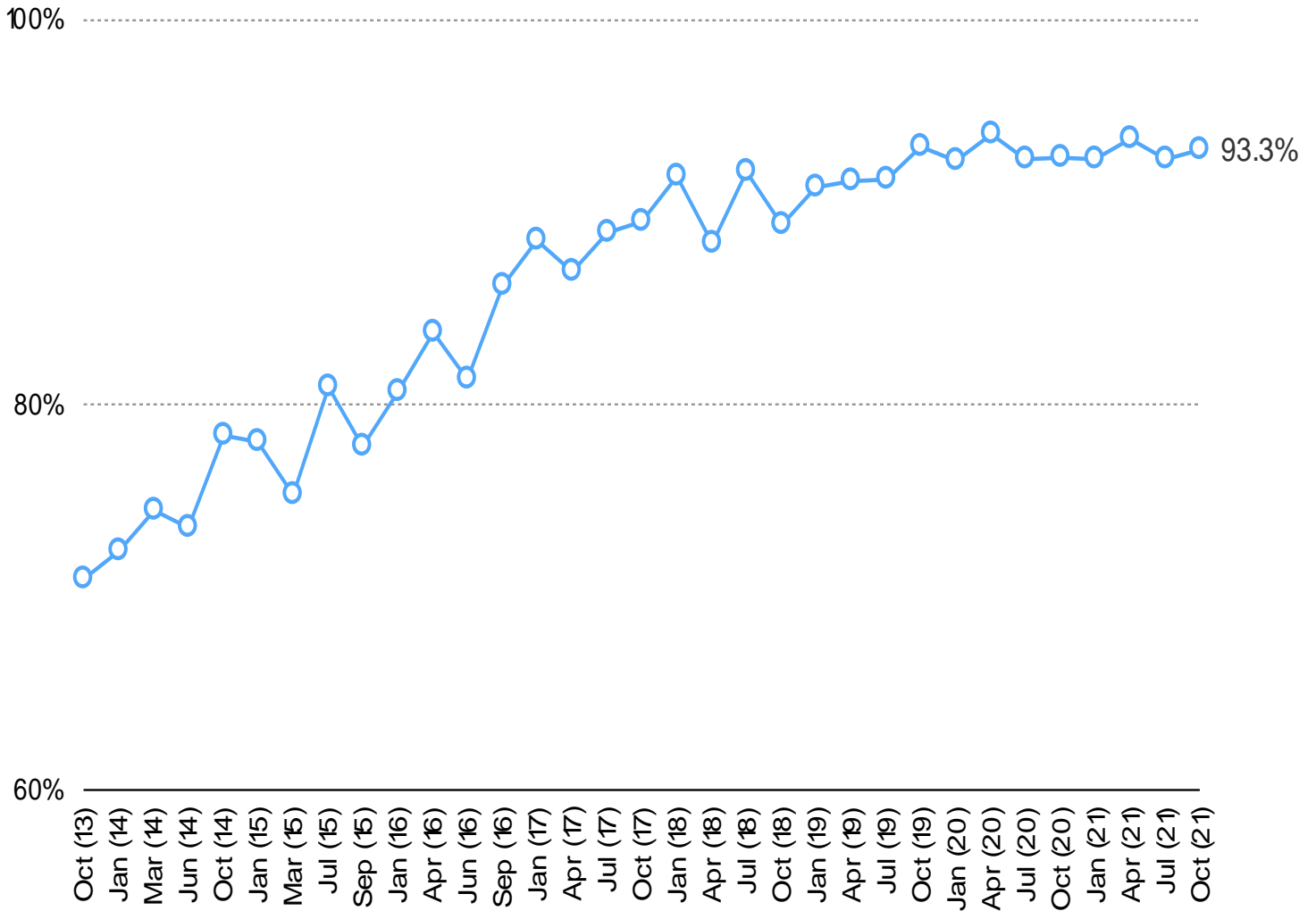
This question was posed to all consumers.



SECTION 3: SMARTPHONE MARKET SHARE

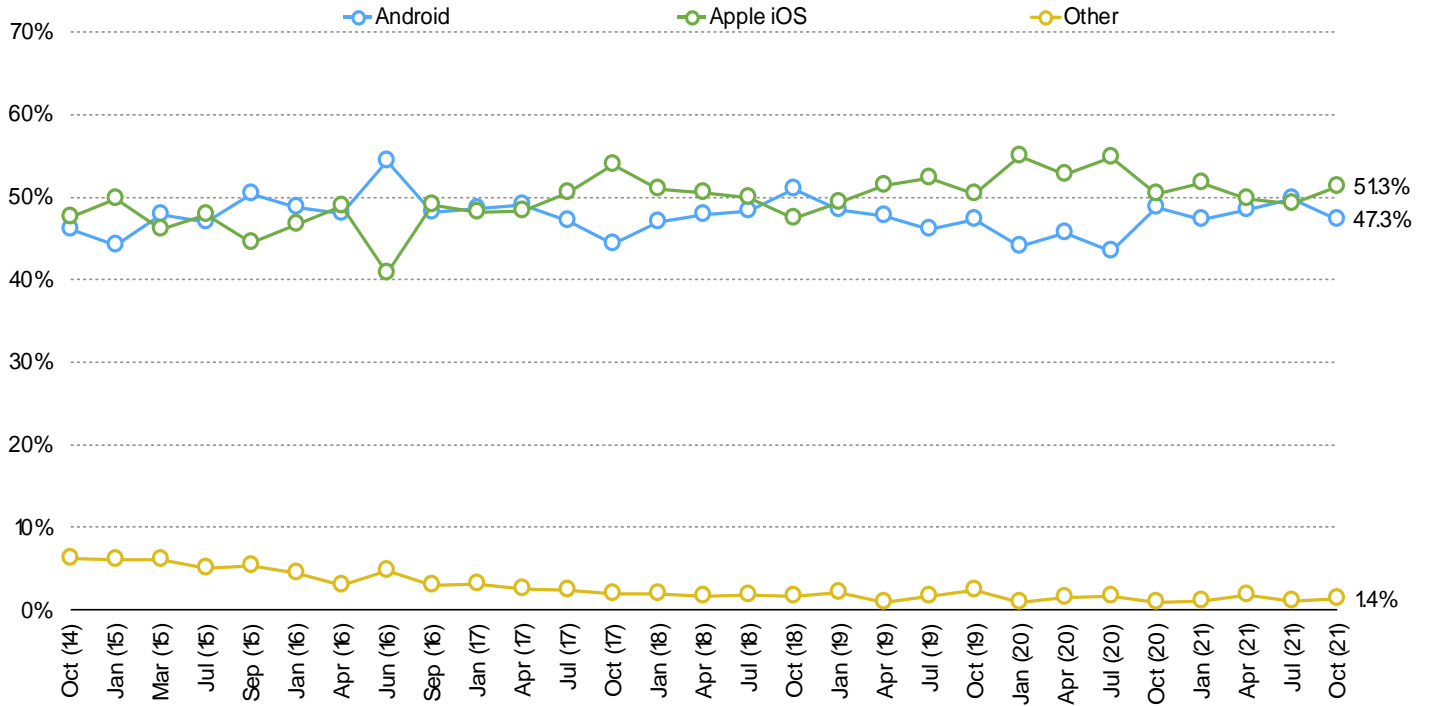
DO YOU OWN A SMARTPHONE?

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 too expensive. Android battery lasts longer.

Don't like Apple's constraints.

They're not easy to use. And they're way too expensive. People only pay for the name.

Price, prefer Android OS.

Don't like Apple products.

I cannot afford Apple phones!

Because I find Android phones easier to use.

I've owned both iPhone and Android. I hate iPhones! I love my Pixel!

I prefer the customization available with Android. Apple is also far too expensive.

Cheaper Samsung phone does everything I need for a fraction of the cost.

Not worth the money. Android phones have features before iPhone.

Ridiculously overpriced.

I have always used a Droid and feel comfortable with it. iPhones have too many technical problems.

I hate the brand.. That's all I need to say.

Better compatibility with other software.

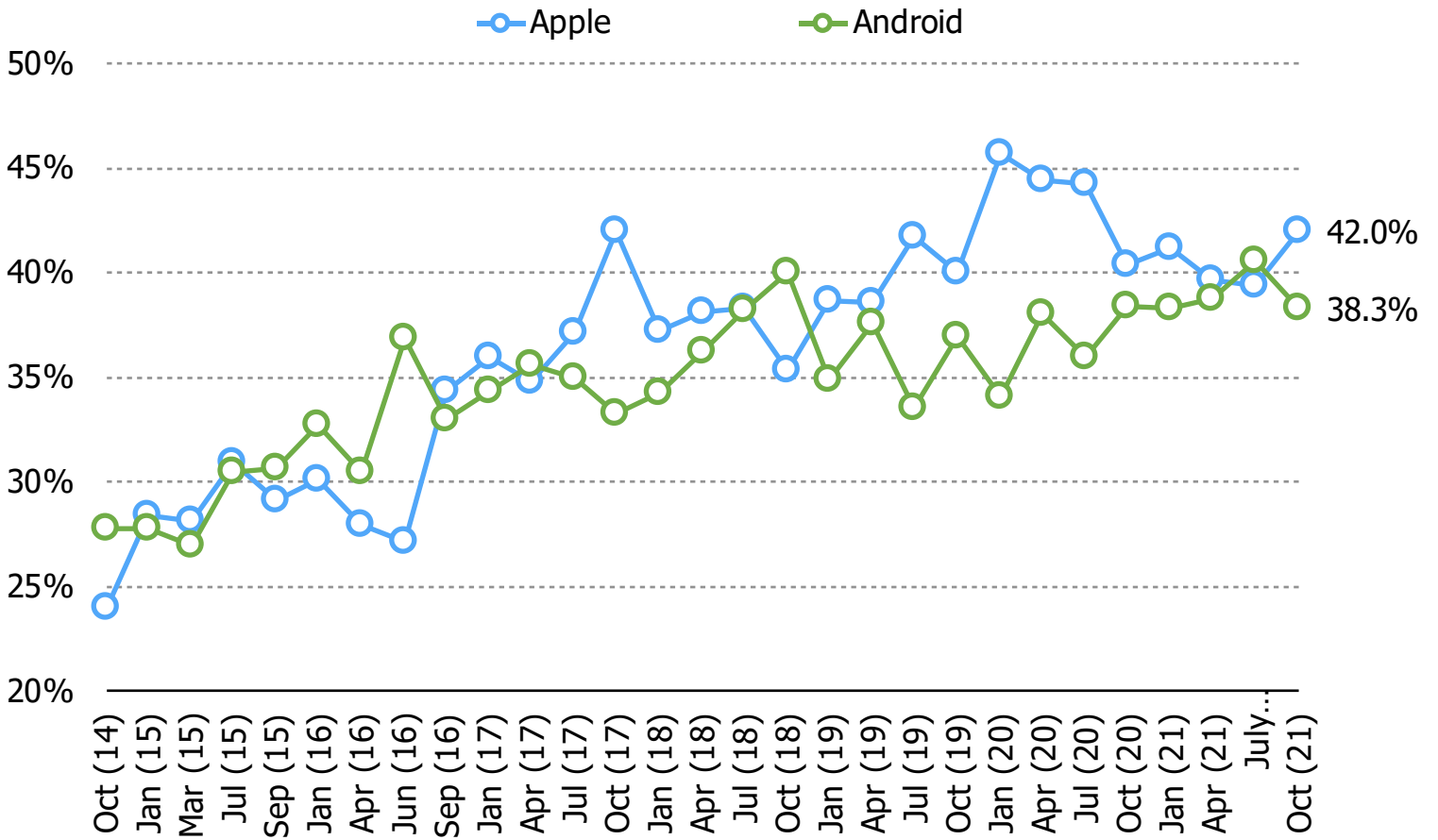
I prefer the operating system.

I hate Apple. They are arrogant, inflexible, greedy, and WRONG about a great many things.

I have always had Android.

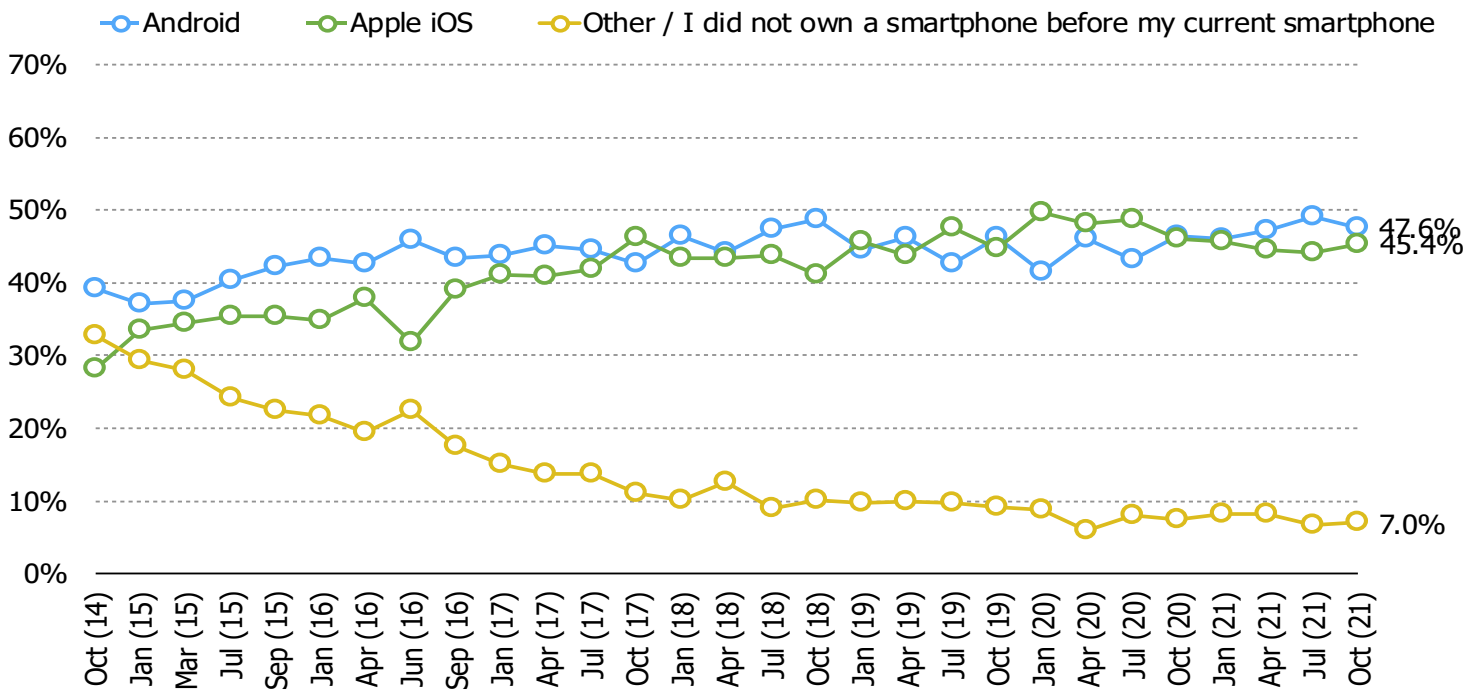
“TRIPLE PLAYS” – PERCENTAGE OF SMARTPHONE OWNERS WHO OWN THE SAME OPERATING SYSTEM FOR LAST PHONE, CURRENT PHONE, AND PLAN TO USE SAME FOR NEXT PHONE

This question was posed to smartphone owners.



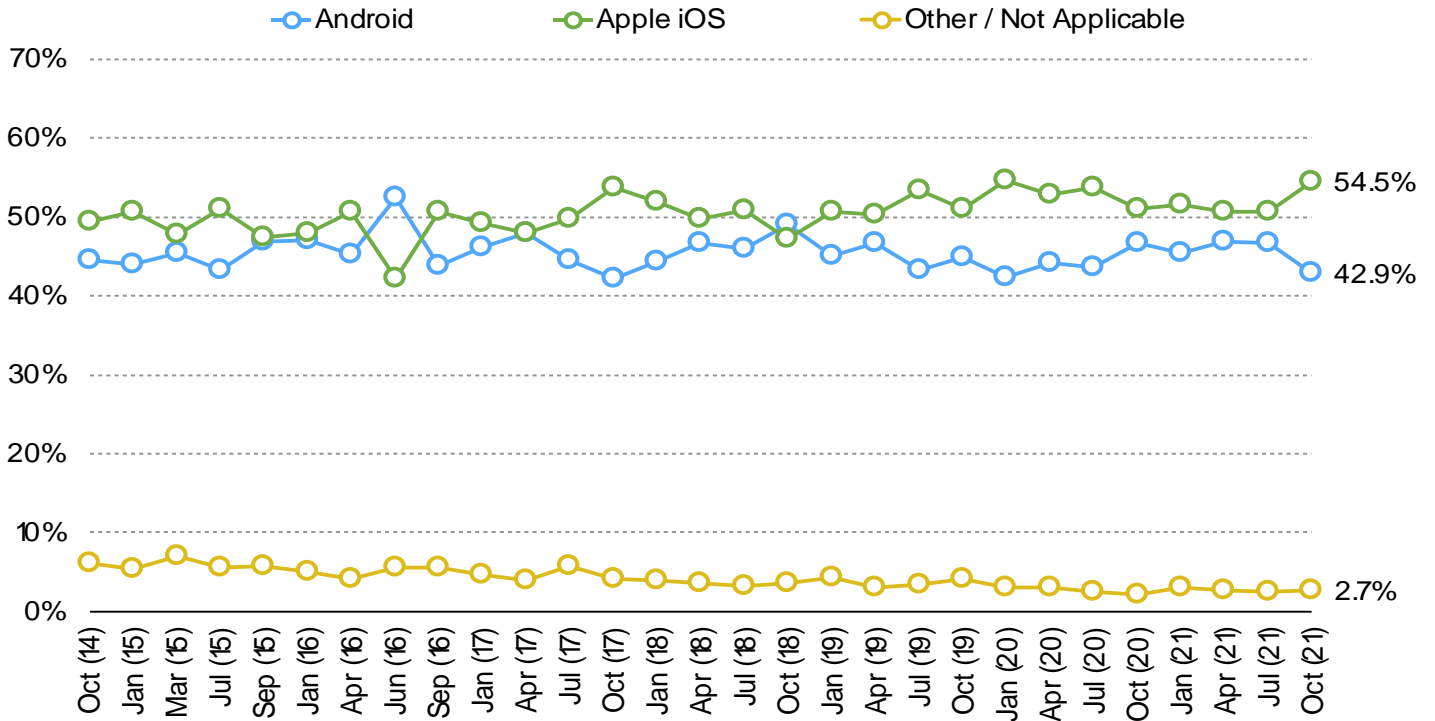
OPERATING SYSTEM FOR SMARTPHONE BEFORE CURRENT SMARTPHONE

This question was posed to smartphone owners.



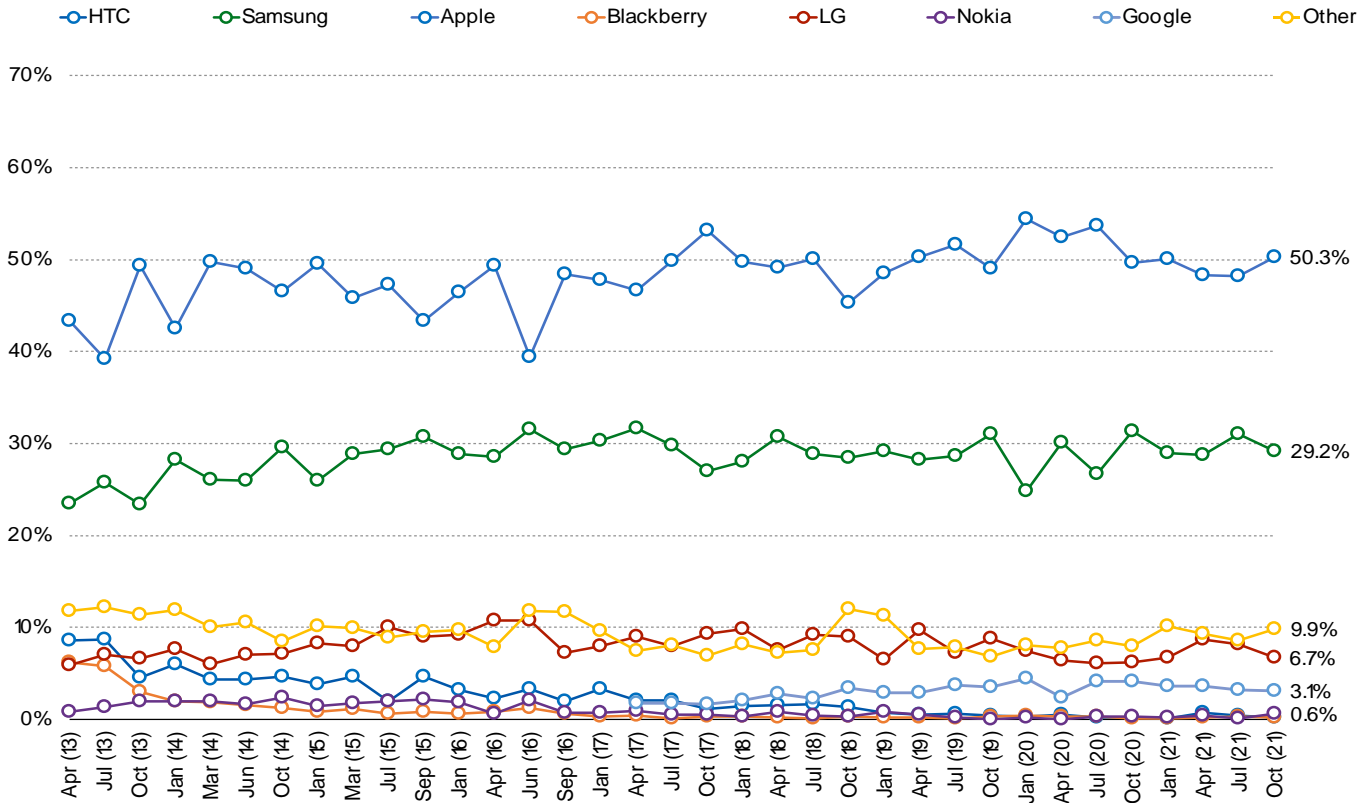
OPERATING SYSTEM FOR NEXT SMARTPHONE

This question was posed to smartphone owners.



MARKET SHARE - SMARTPHONES

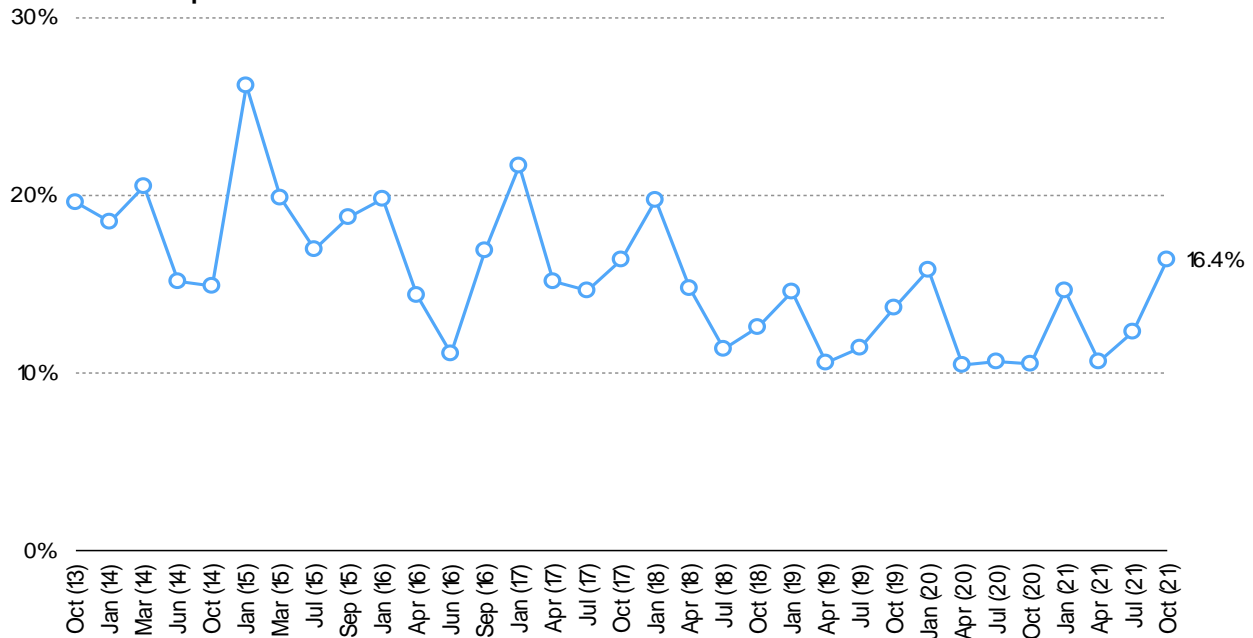
This question was posed to smartphone owners.



SECTION 4: IPHONE DYNAMICS

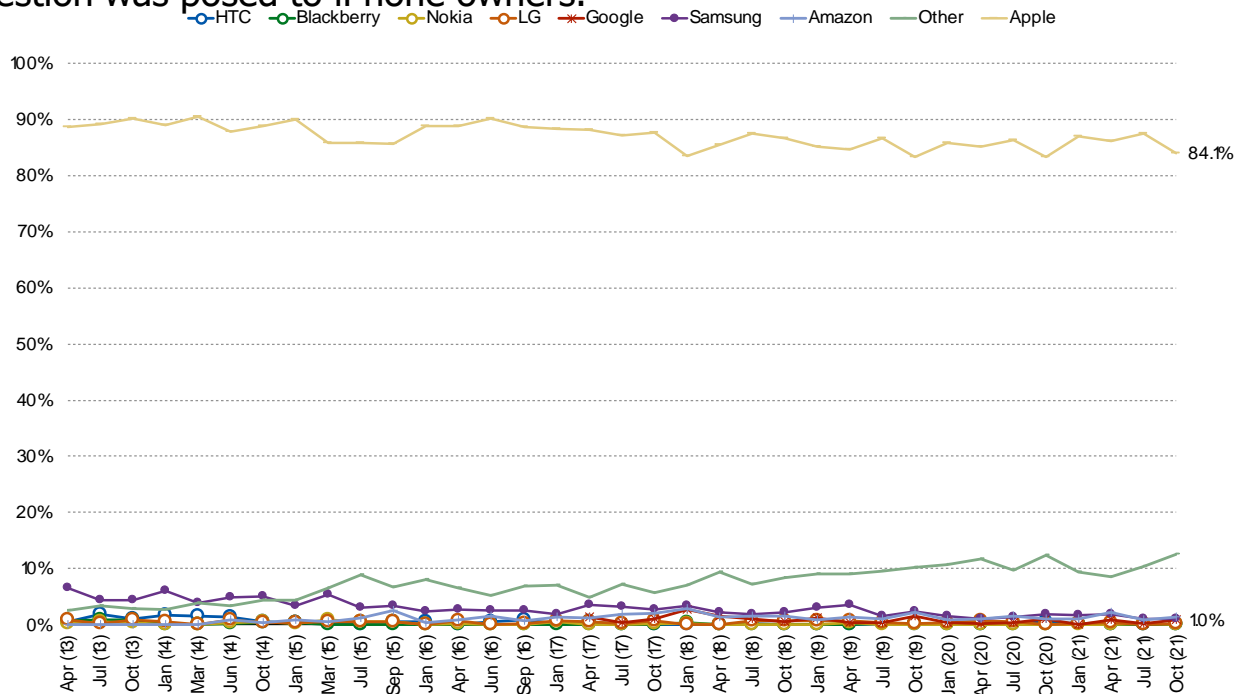
GOT IPHONE WITHIN PAST THREE MONTHS

This question was posed to iPhone owners.



WHICH SMARTPHONE DO YOU PLAN TO GET NEXT?

This question was posed to iPhone owners.

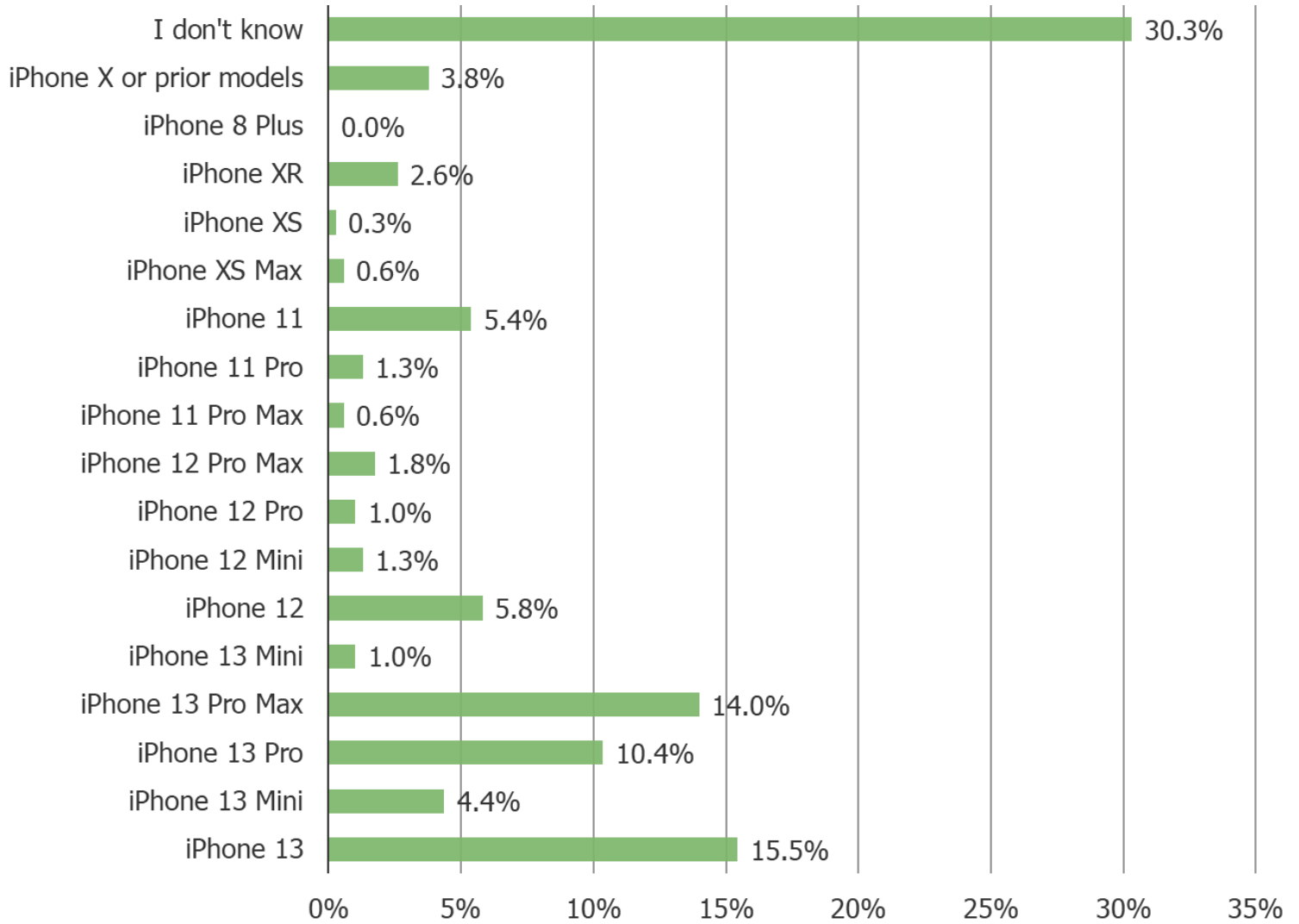


IPHONE MIX – WHICH MODEL DO YOU CURRENTLY OWN?

Answer Choices	Oct (19)	Jan (20)	Apr (20)	Jul (20)	Oct (20)	Jan (21)	Apr (21)	Jul (21)	Oct (21)
iPhone 13	2.36%								2.4%
iPhone 13 Mini	0.63%								0.6%
iPhone 13 Pro	2.20%								2.2%
iPhone 13 Pro Max	1.89%								1.9%
iPhone 12						3.3%	5.3%	8.3%	9.1%
iPhone 12 Mini						1.1%	2.8%	3.6%	2.7%
iPhone 12 Pro						3.1%	4.1%	3.6%	3.0%
iPhone 12 Pro Max						2.9%	4.3%	4.5%	7.4%
iPhone 11 Pro Max	1.5%	2.6%	3.9%	5.6%	5.0%	4.0%	3.2%	3.2%	4.6%
iPhone 11 Pro	1.3%	3.4%	4.0%	4.9%	5.2%	4.8%	7.1%	4.5%	3.9%
iPhone 11	2.8%	6.4%	9.4%	9.6%	12.2%	12.9%	13.0%	14.0%	11.5%
iPhone XS Max	4.8%	2.6%	3.1%	3.2%	1.8%	2.6%	2.6%	2.0%	2.8%
iPhone XS	4.3%	4.0%	2.9%	4.9%	3.4%	2.0%	1.9%	2.8%	4.6%
iPhone XR	11.5%	10.2%	11.7%	10.3%	12.4%	10.3%	9.8%	9.7%	8.7%
iPhone X or Prior	73.8%	70.8%	65.0%	61.5%	60.2%	53.1%	46.0%	43.7%	34.7%

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?

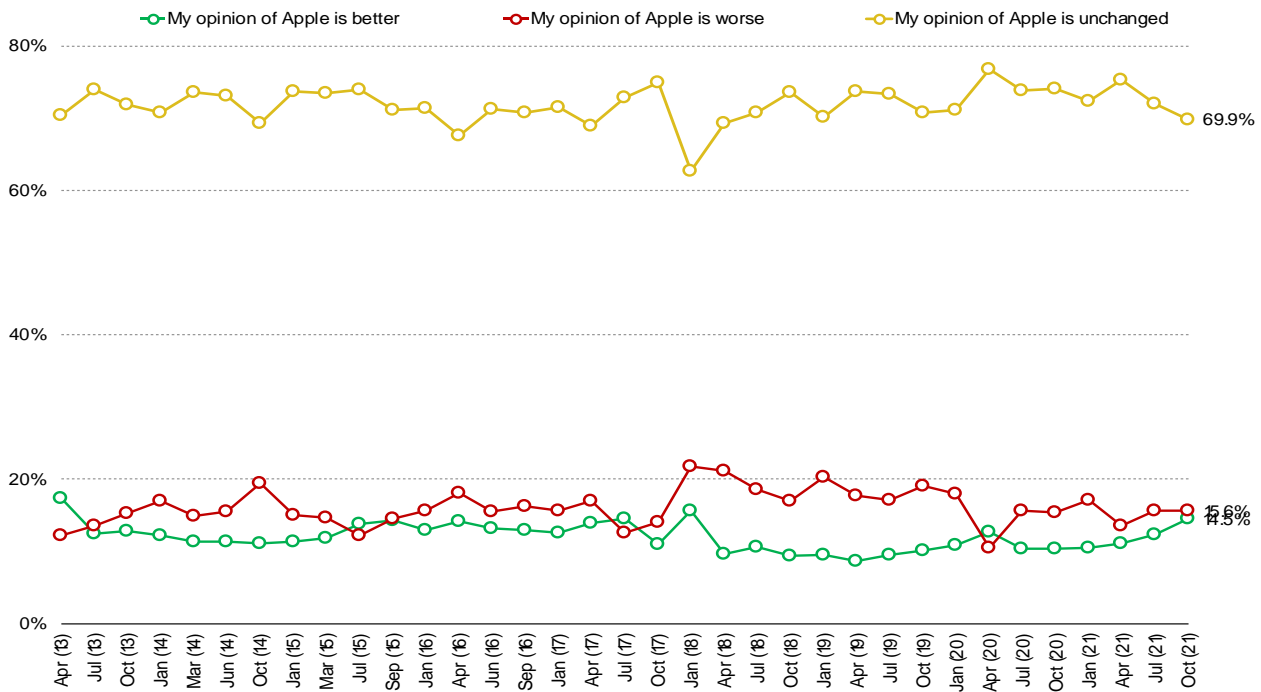
This question was posed to smartphone owners.



SECTION 5: CONSUMER SENTIMENT

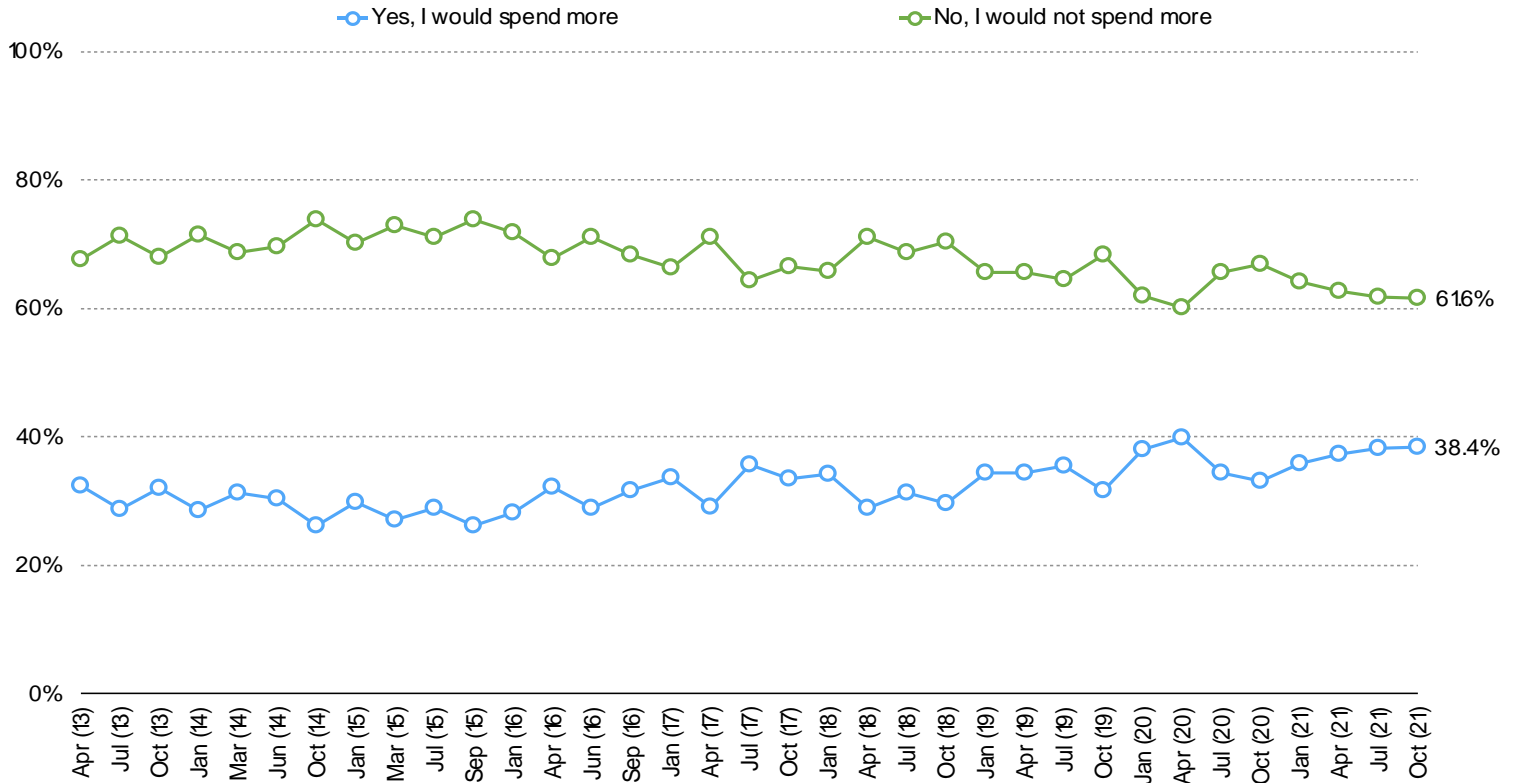
HAS YOUR OPINION OF APPLE CHANGED OVER THE PAST YEAR?

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?

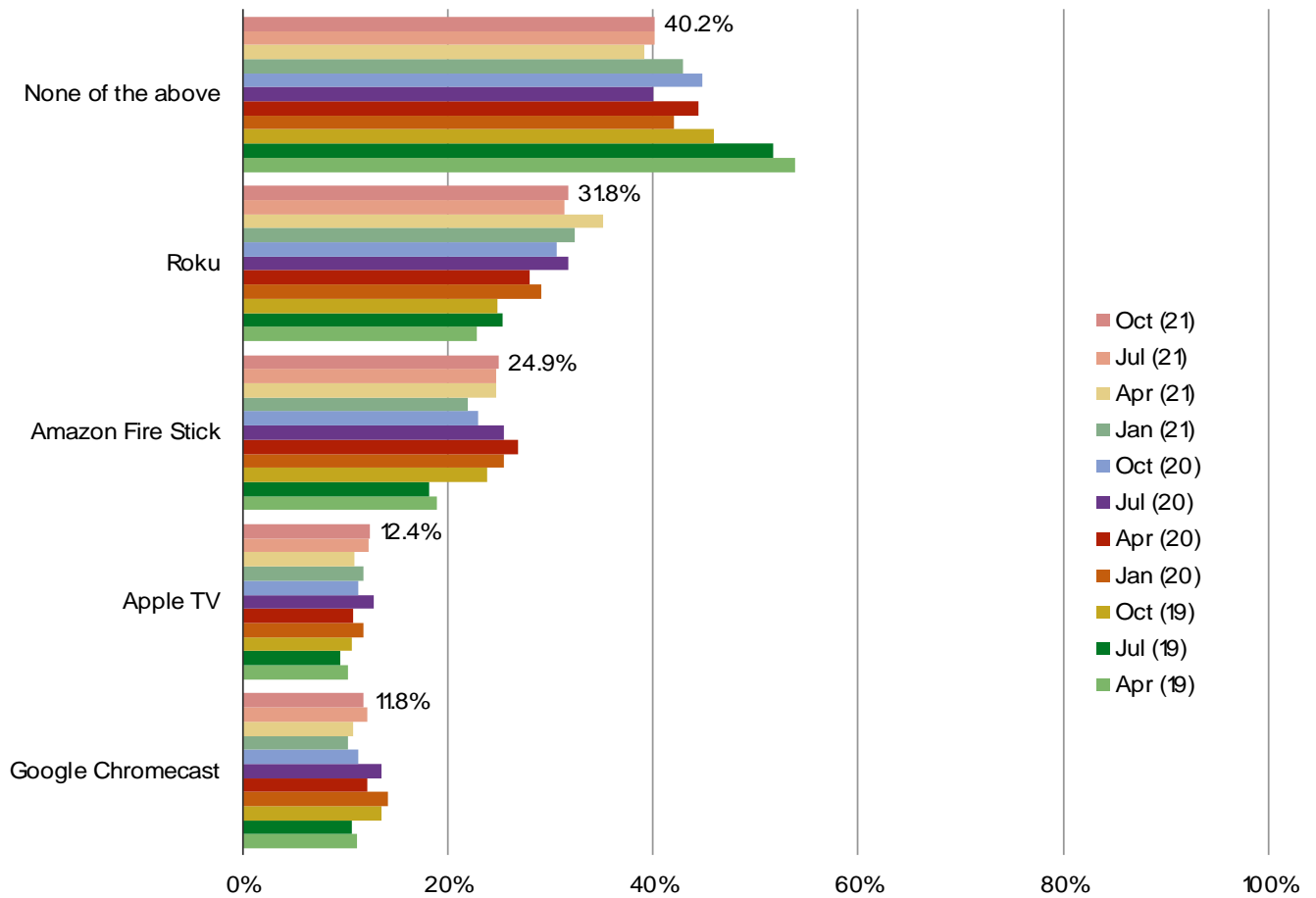
This question was posed to all respondents



SECTION 6: STREAMING PLAYERS

DO YOU OWN ANY OF THE FOLLOWING STREAMING PLAYERS?

This question was posed to all consumers.



SECTION 7: RETAILERS

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

