

Bespoke Survey Research

July 2023

Consumer Electronics

Volume 42 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: AAPL, AMZN, GOOG, Samsung.

KPIs and Key questions

1. Respondents with interest in the upcoming Apple Vision Pro product over-index as higher income, younger, and male.
2. In recent quarters, smartphone owners have been increasingly likely to say they get a new phone every 2 years (every year declined recently, as has longer than every two years).
3. The top reason for why Android owners do not choose iOS is cost.
4. Market share dynamics improved for Apple this wave. At this point, 83.7% of smartphone owners are very sticky with Apple or Android (ie, owned that operating system last, now, and expects to get it again next).
5. iPhone owners have grown increasingly likely over the past year to say they are paying monthly for the device (as opposed to those saying they paid the full amount upfront).
6. The share of iPhone users who use Apple Pay continues to increase and reached a new series high this quarter.
7. Consumer sentiment toward Apple typically doesn't change much, though we would note improvements so far in our 2023 survey waves.

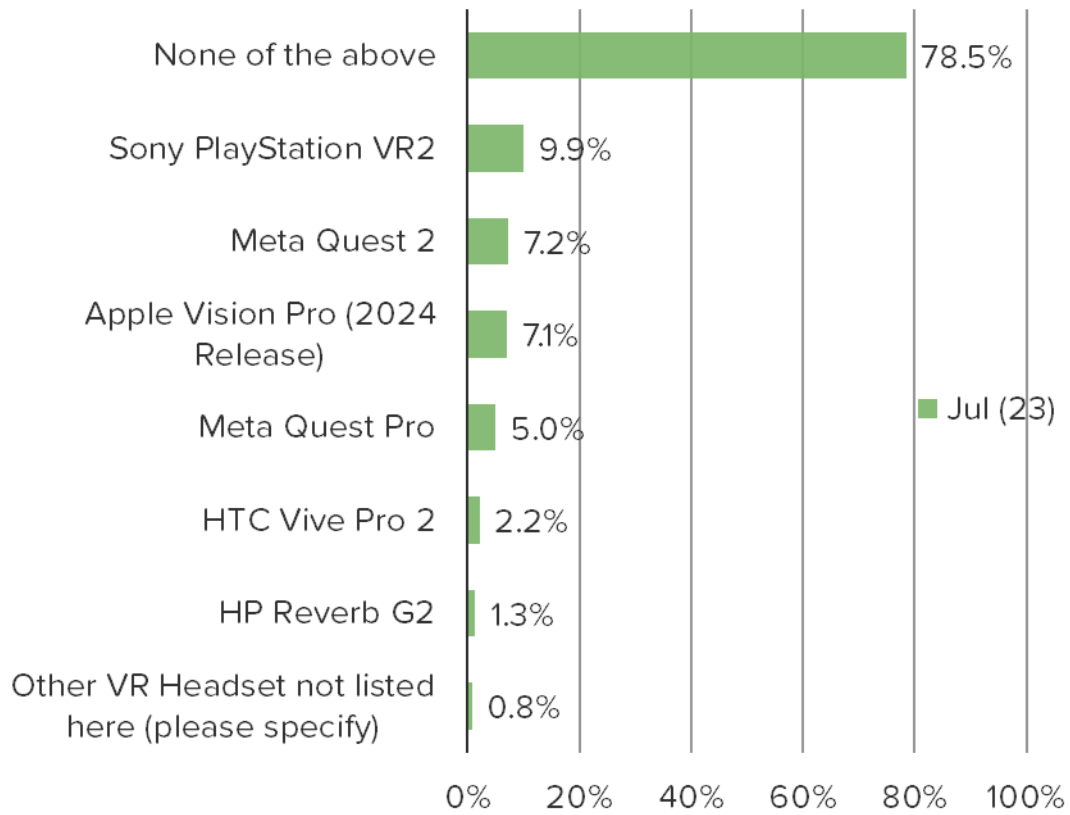
Noteworthy Stats:

- 7.1%** Of respondents expressed interest in the Apple Vision Pro (2024 release).
- 7.2%** Of respondents said they were interested in the Meta Quest 2 headset.
- 50.6%** Of smartphone owners are iOS users.
- 85.1%** Of Android smartphone owners do not plan to switch to any of the latest/upcoming iPhones models when it is time to get a new smartphone.

NEW QUESTIONS

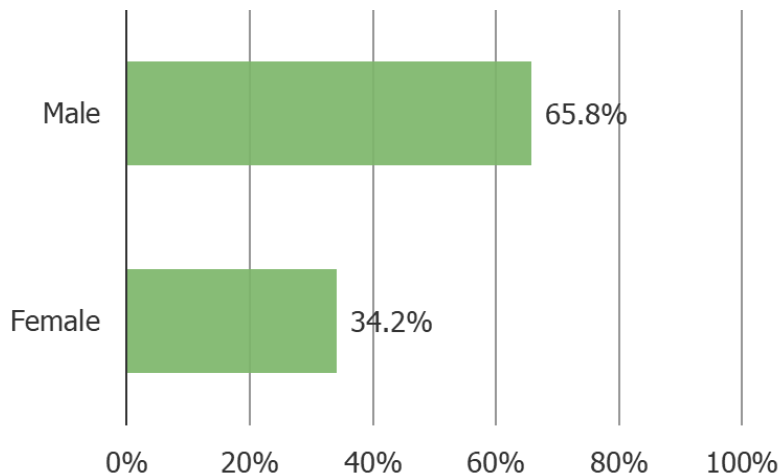
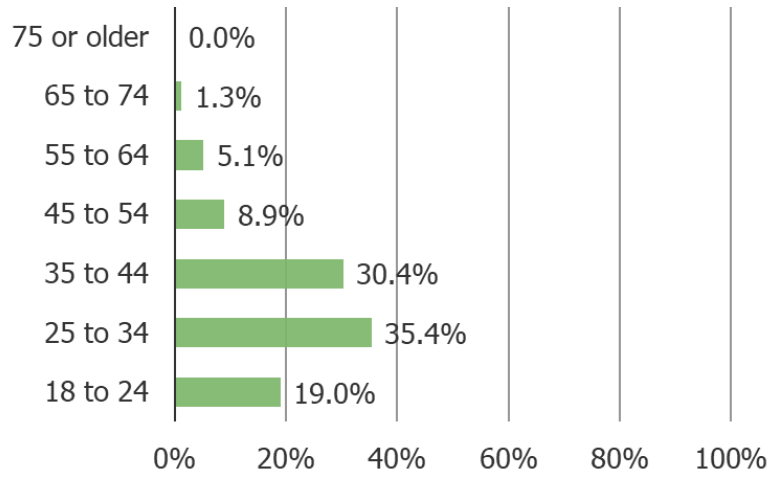
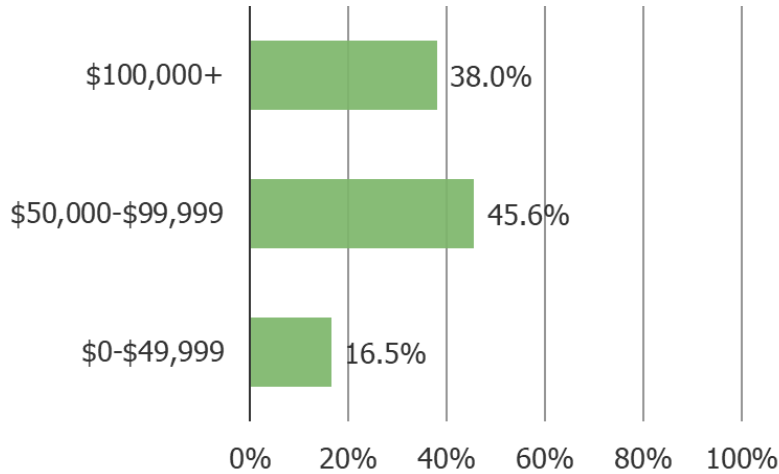
DO YOU HAVE ANY INTEREST IN THE FOLLOWING PRODUCTS? SELECT ALL THAT APPLY

This question was posed to all respondents.



DEMOGRAPHICS OF THOSE INTERESTED IN THE VISION PRO

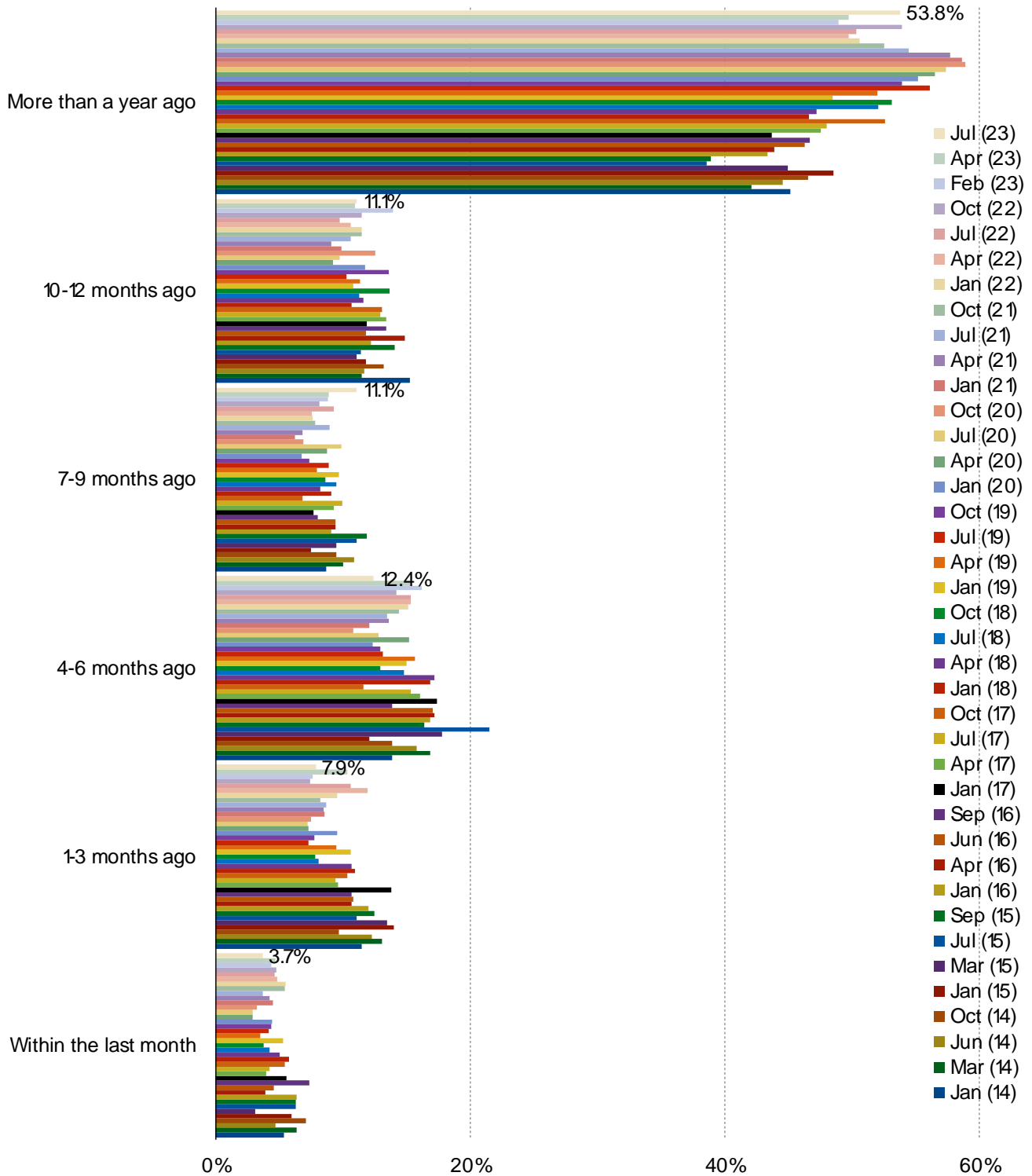
This question was posed to respondents who said they are interested in the upcoming Apple Vision Pro product (N = 79)



SMARTPHONE REFRESH CYCLES

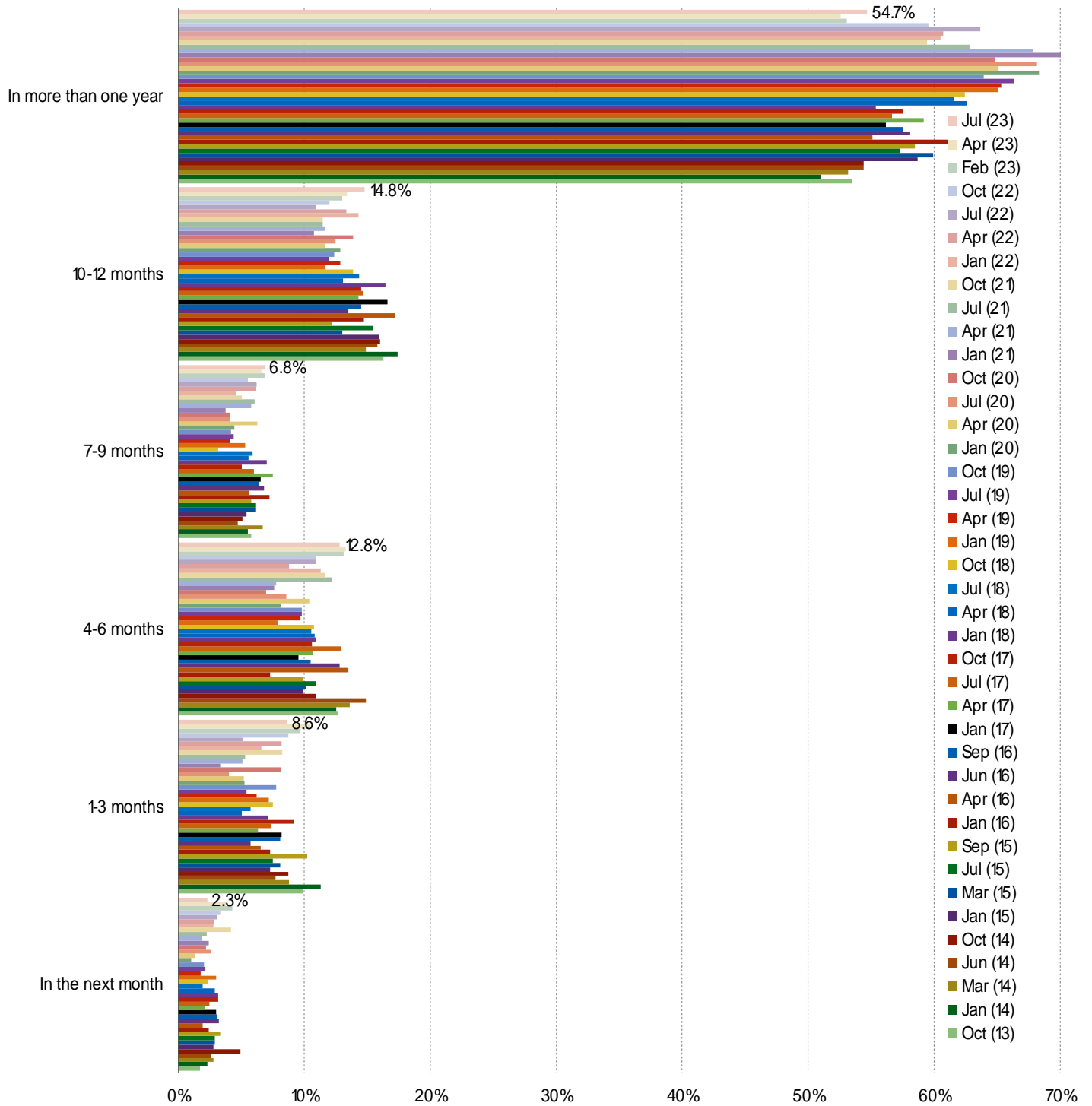
WHEN DID YOU GET YOUR CURRENT SMARTPHONE?

This question was posed to smartphone owners.



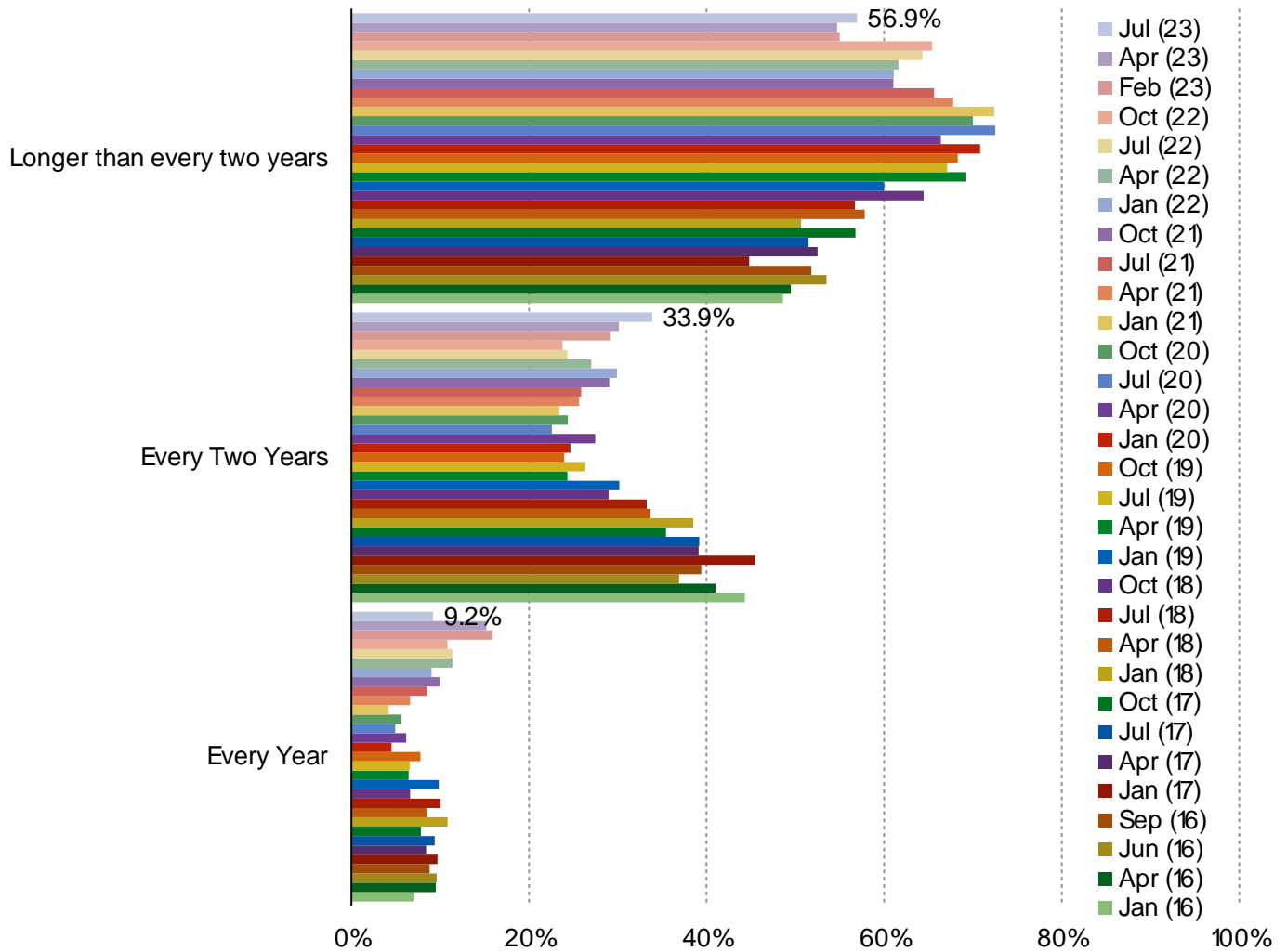
EXPECTED DATE OF NEXT SMARTPHONE PURCHASE

This question was posed to smartphone owners.



GOING FORWARD, HOW FREQUENTLY DO YOU PLAN TO PURCHASE/GET NEW SMARTPHONES?

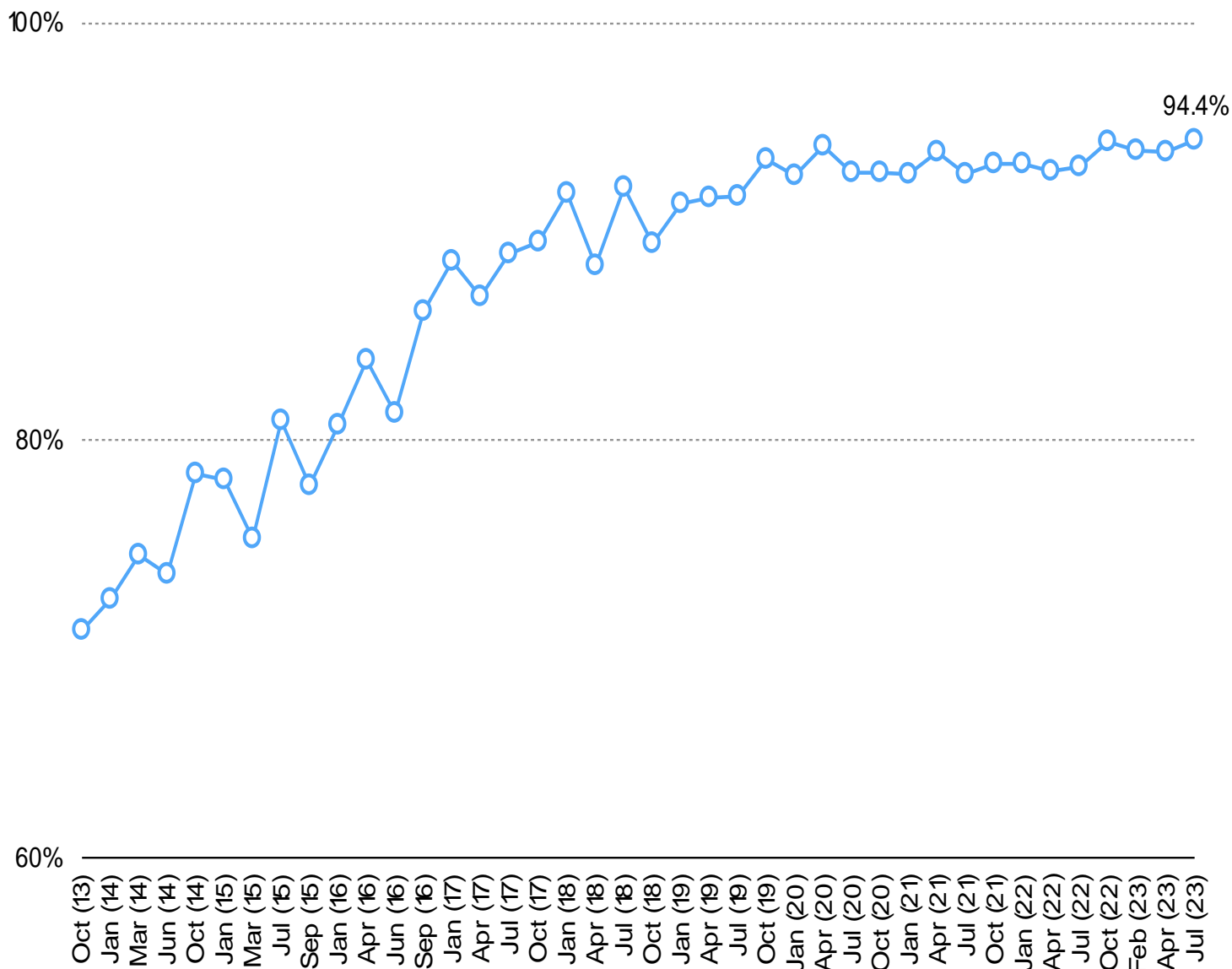
This question was posed to smartphone owners.



SMARTPHONE MARKET SHARE

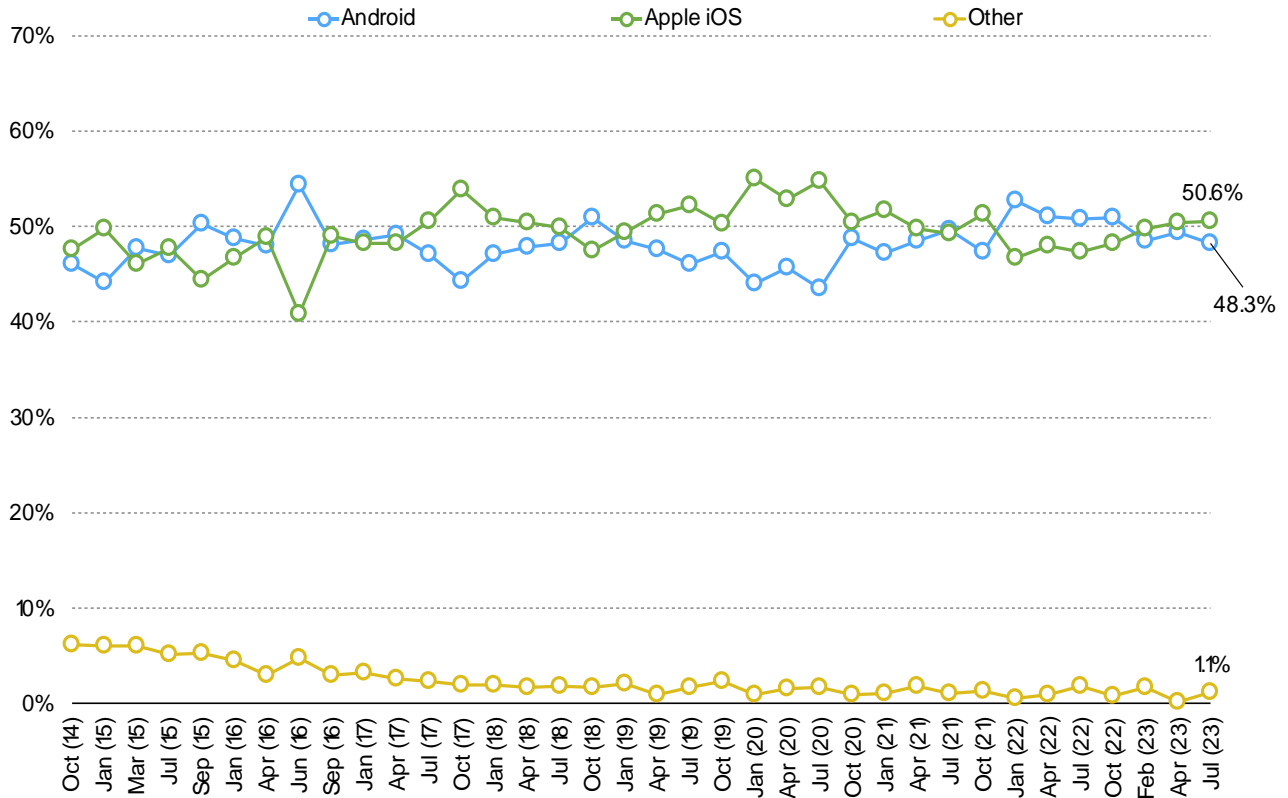
DO YOU OWN A SMARTPHONE?

This question was posed to all consumers.



CURRENT OPERATING SYSTEM FOR SMARTPHONE

This question was posed to smartphone owners.



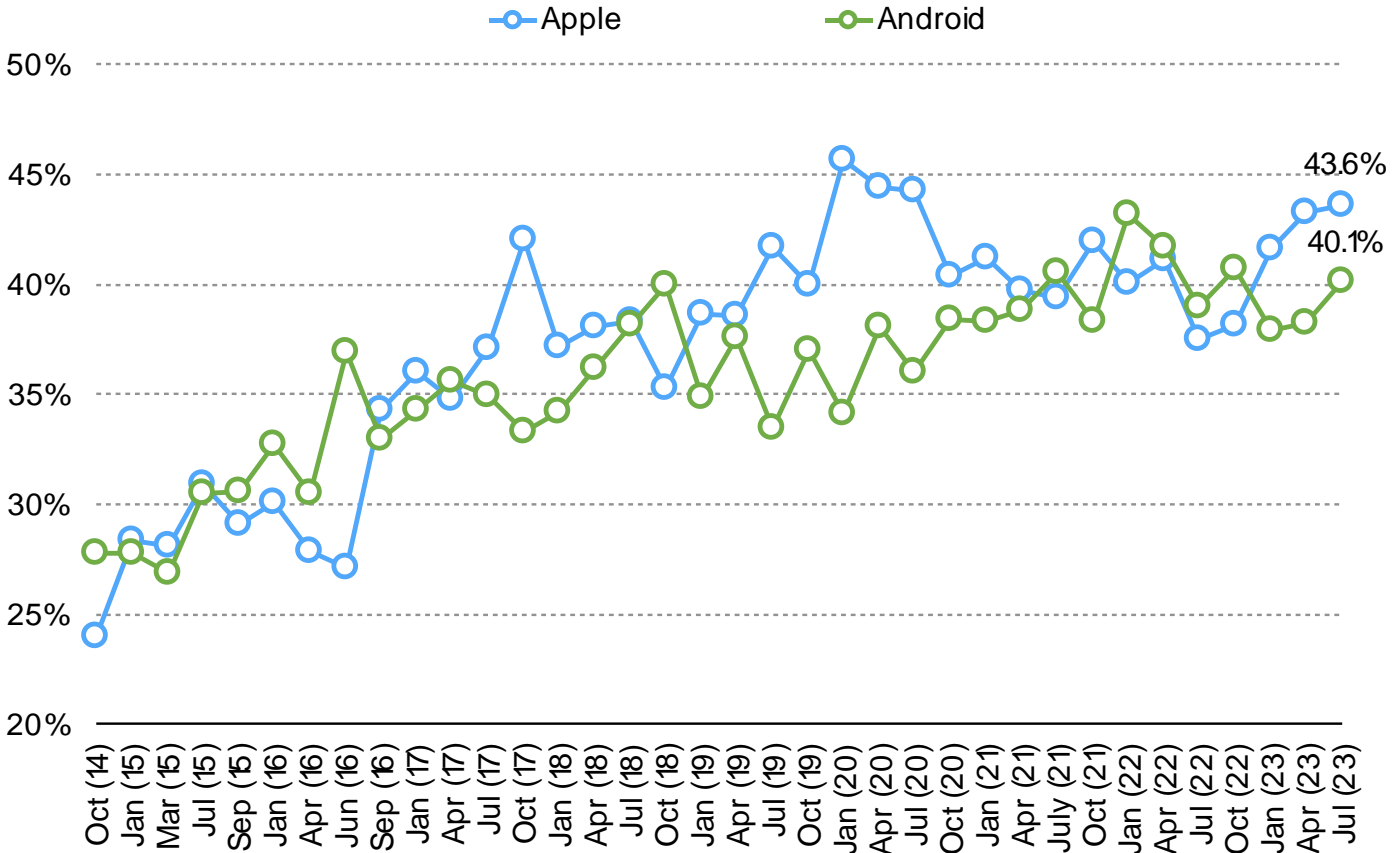
WHY DON'T YOU OWN AN APPLE IPHONE (IE, WHY DID YOU CHOOSE AN ANDROID PHONE INSTEAD)?

This question was posed to Android owners.



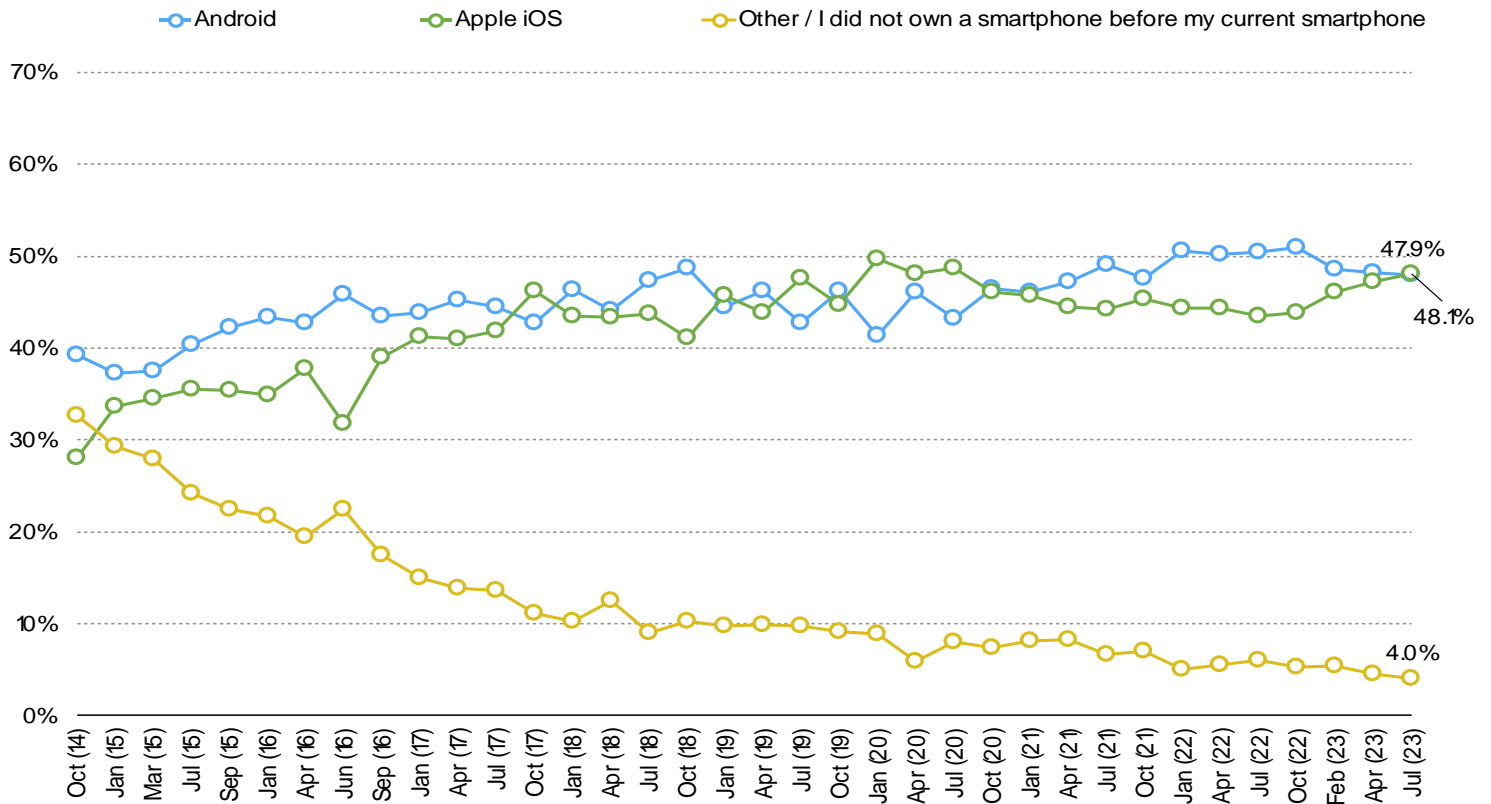
“TRIPLE PLAYS” – PERCENTAGE OF SMARTPHONE OWNERS WHO OWN THE SAME OPERATING SYSTEM FOR LAST PHONE, CURRENT PHONE, AND PLAN TO USE SAME FOR NEXT PHONE

This question was posed to smartphone owners.



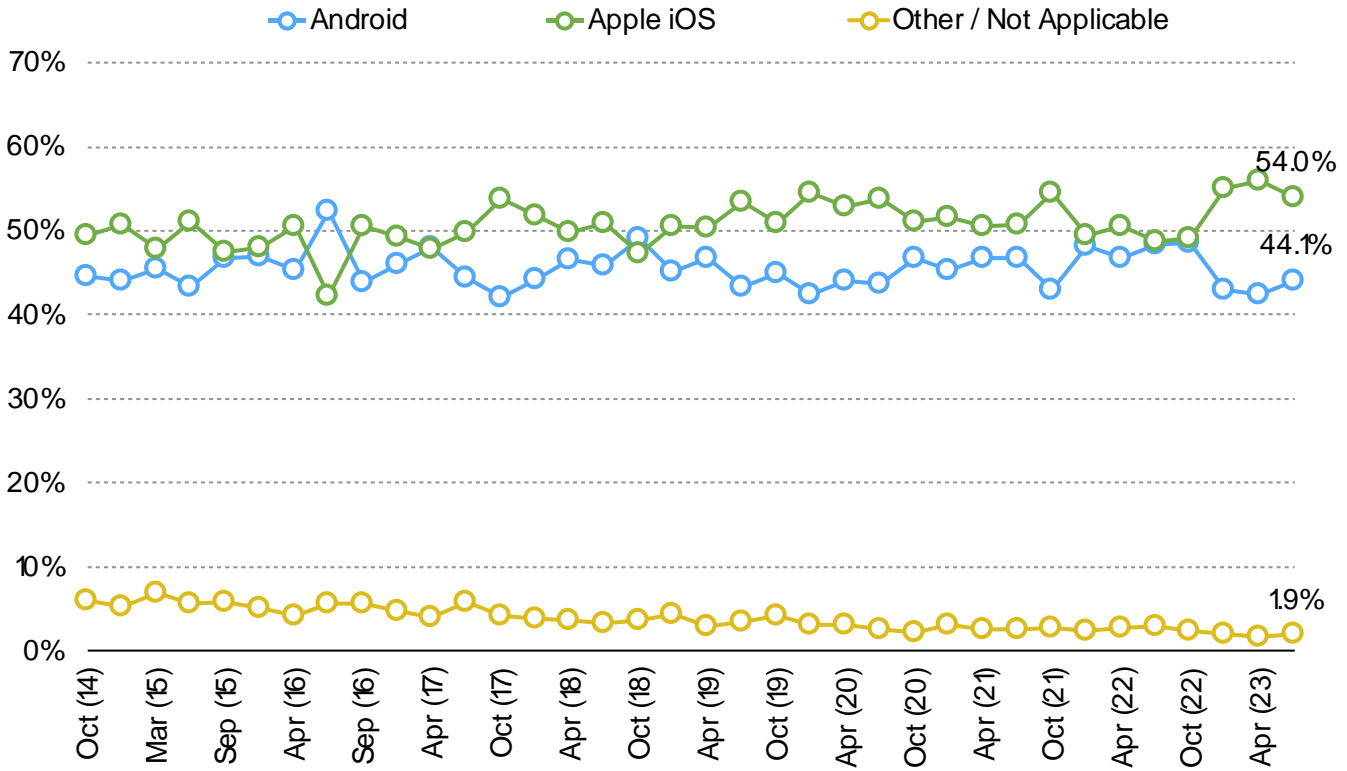
OPERATING SYSTEM FOR SMARTPHONE BEFORE CURRENT SMARTPHONE

This question was posed to smartphone owners.



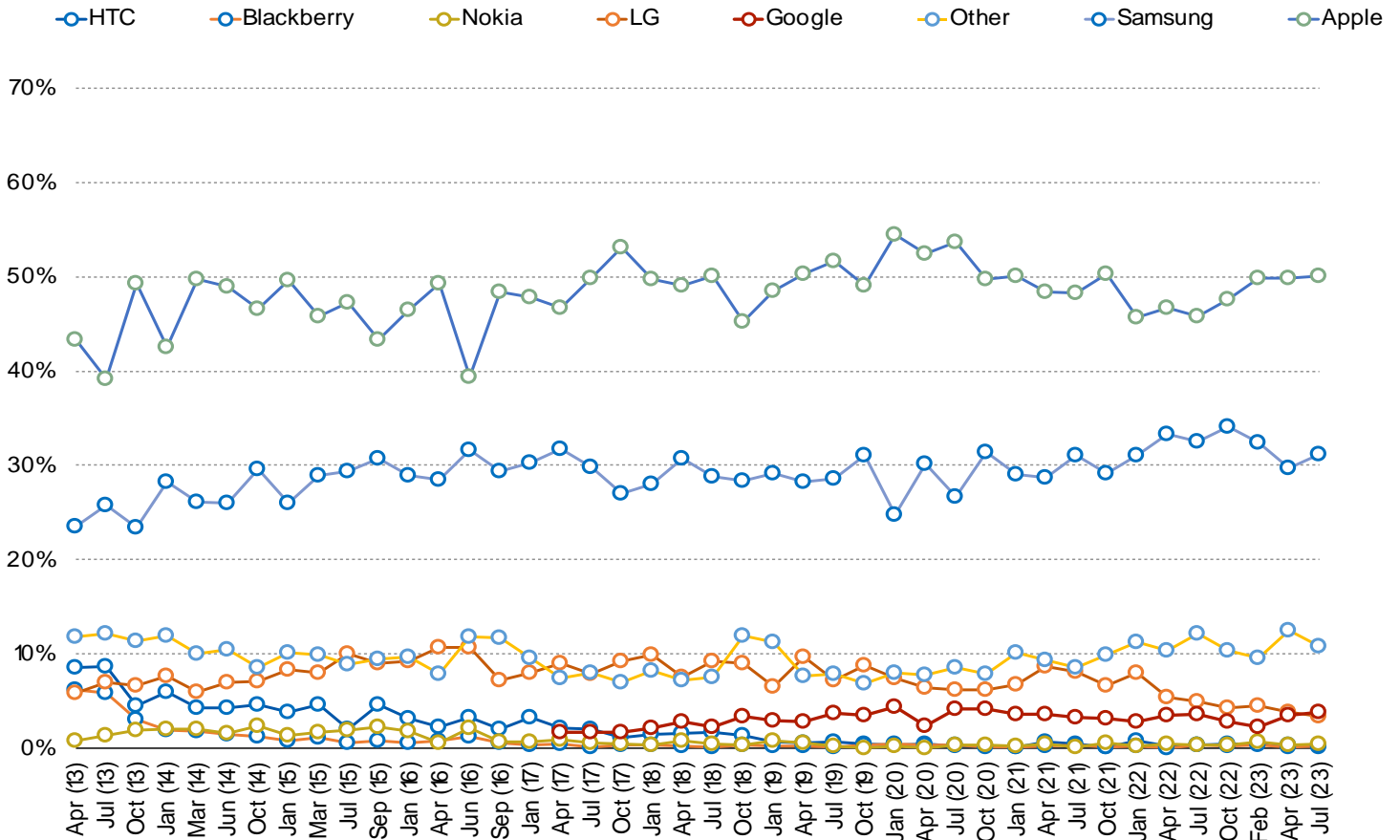
OPERATING SYSTEM FOR NEXT SMARTPHONE

This question was posed to smartphone owners.



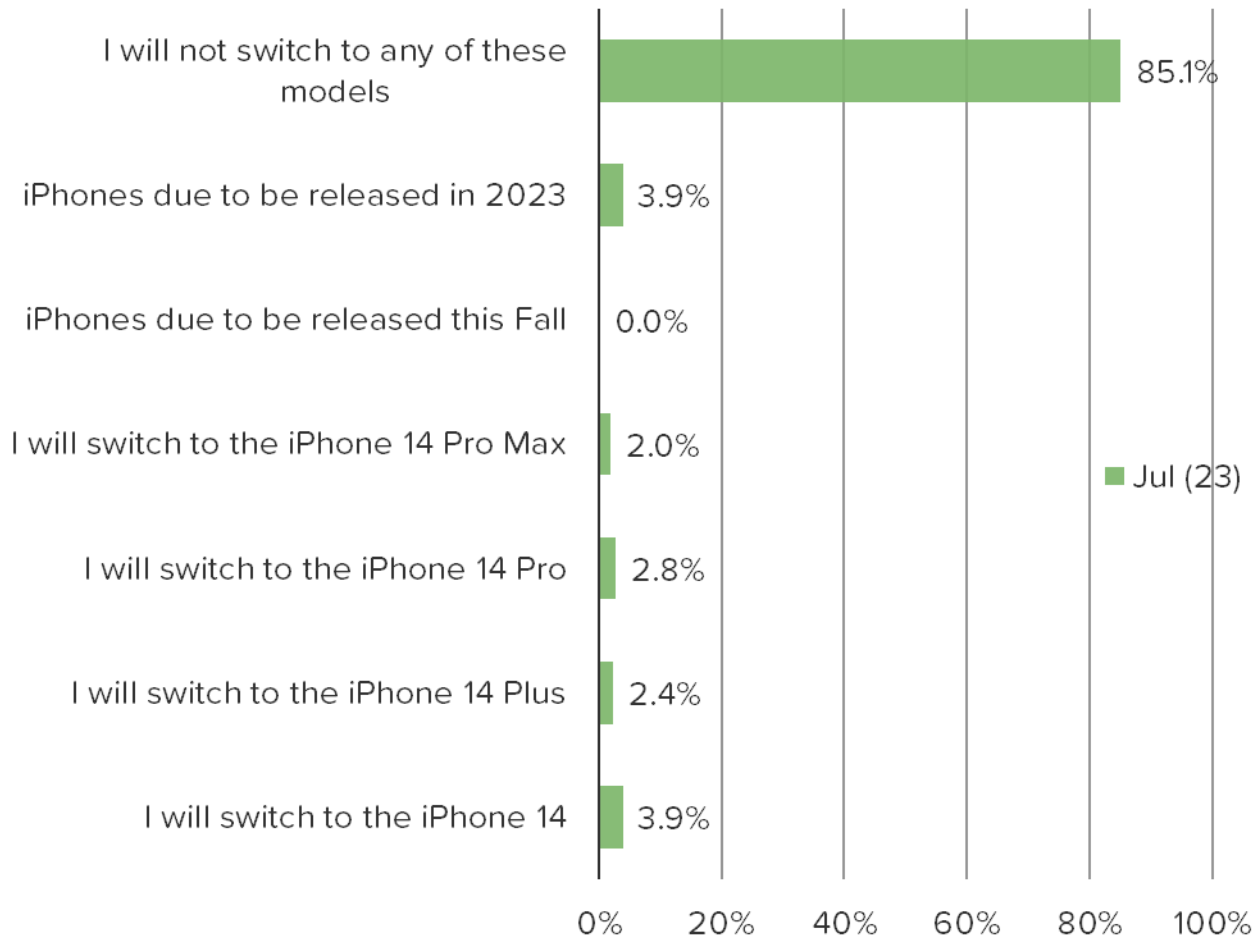
MARKET SHARE - SMARTPHONES

This question was posed to smartphone owners.



DO YOU PLAN TO SWITCH TO ANY OF THE LATEST OR UPCOMING IPHONES WHEN IT IS TIME TO GET A NEW SMARTPHONE?

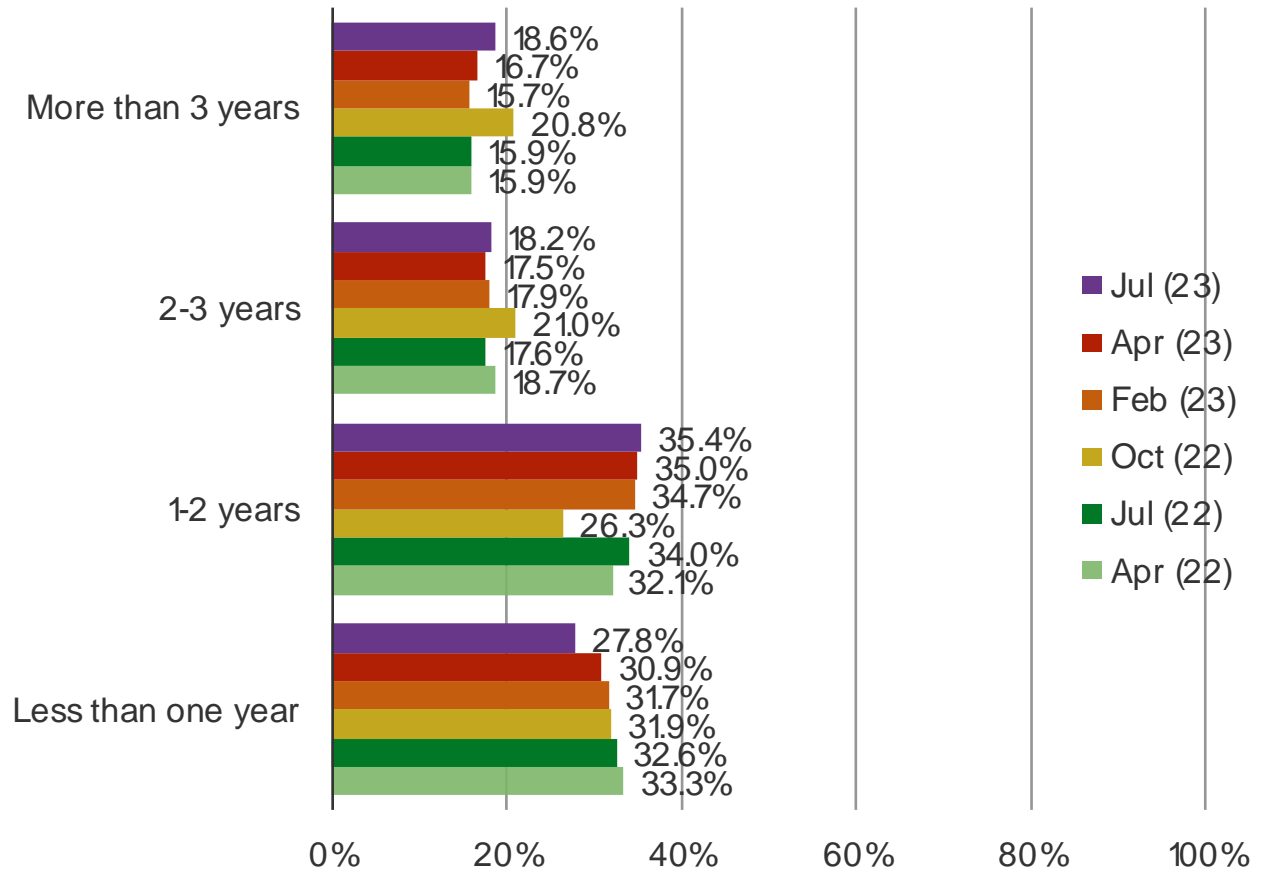
This question was posed to Android smartphone owners.



IPHONE PURCHASE PREFERENCES AND TESTING A LEASING MODEL

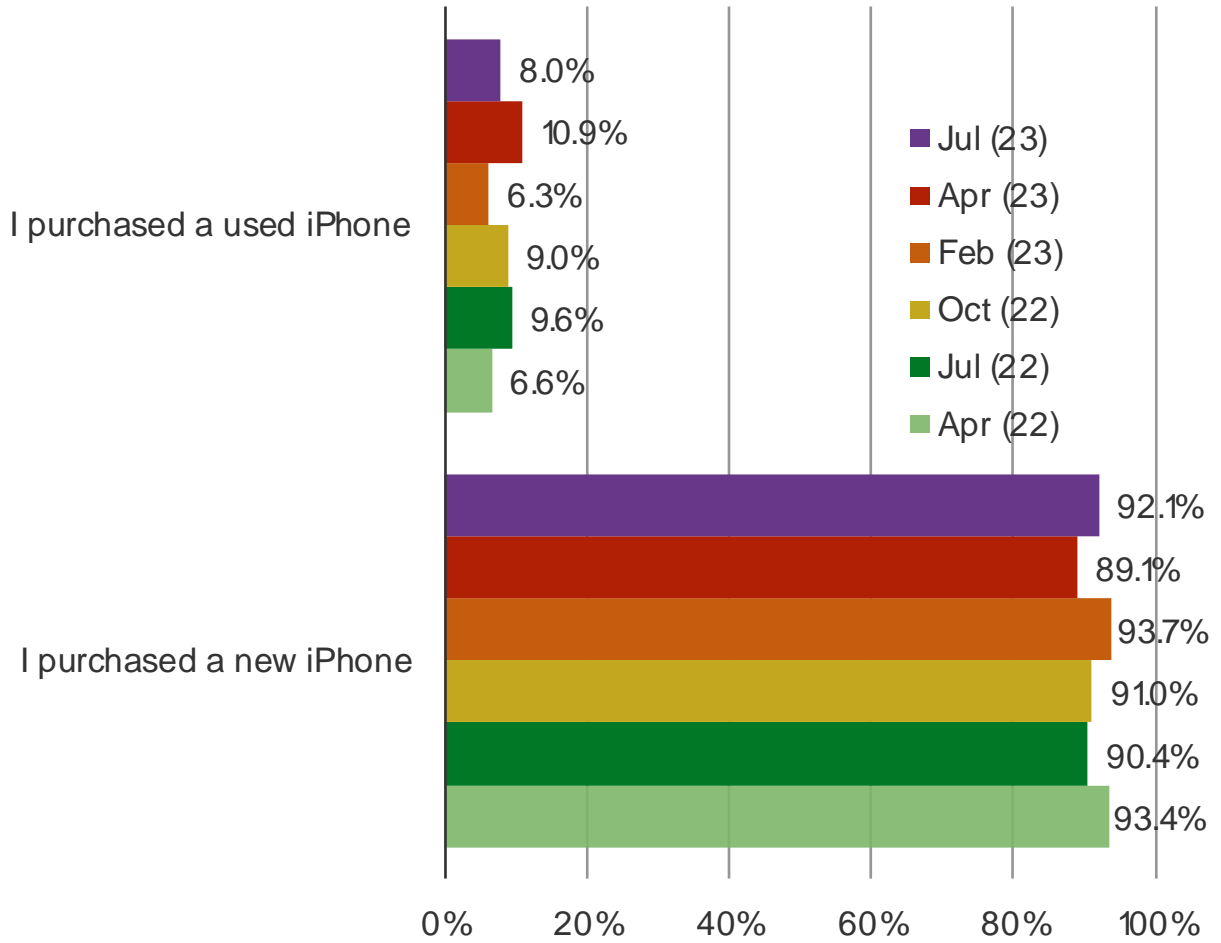
FOR HOW LONG HAVE YOU OWNED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



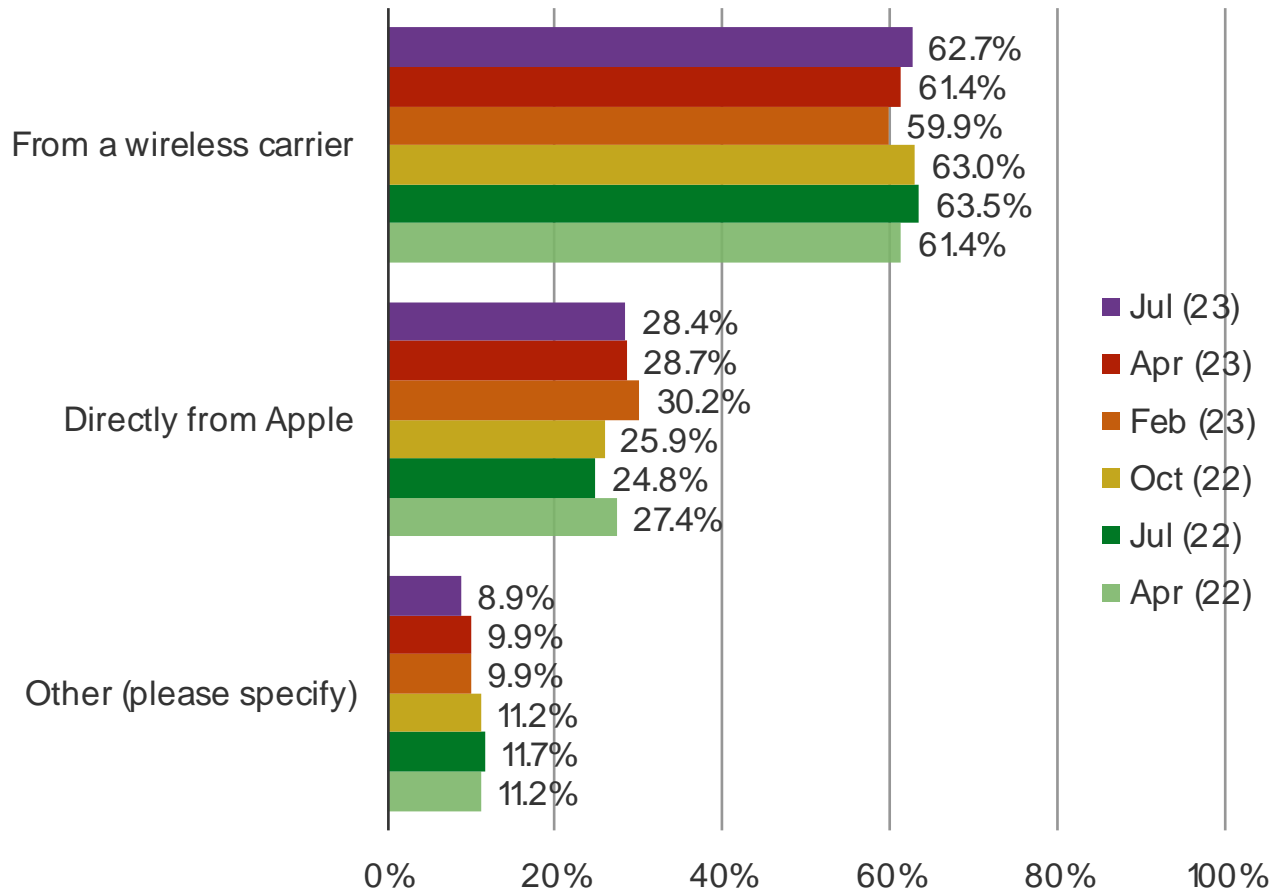
HOW DID YOU PURCHASE YOUR IPHONE?

This question was posed to iPhone owners.



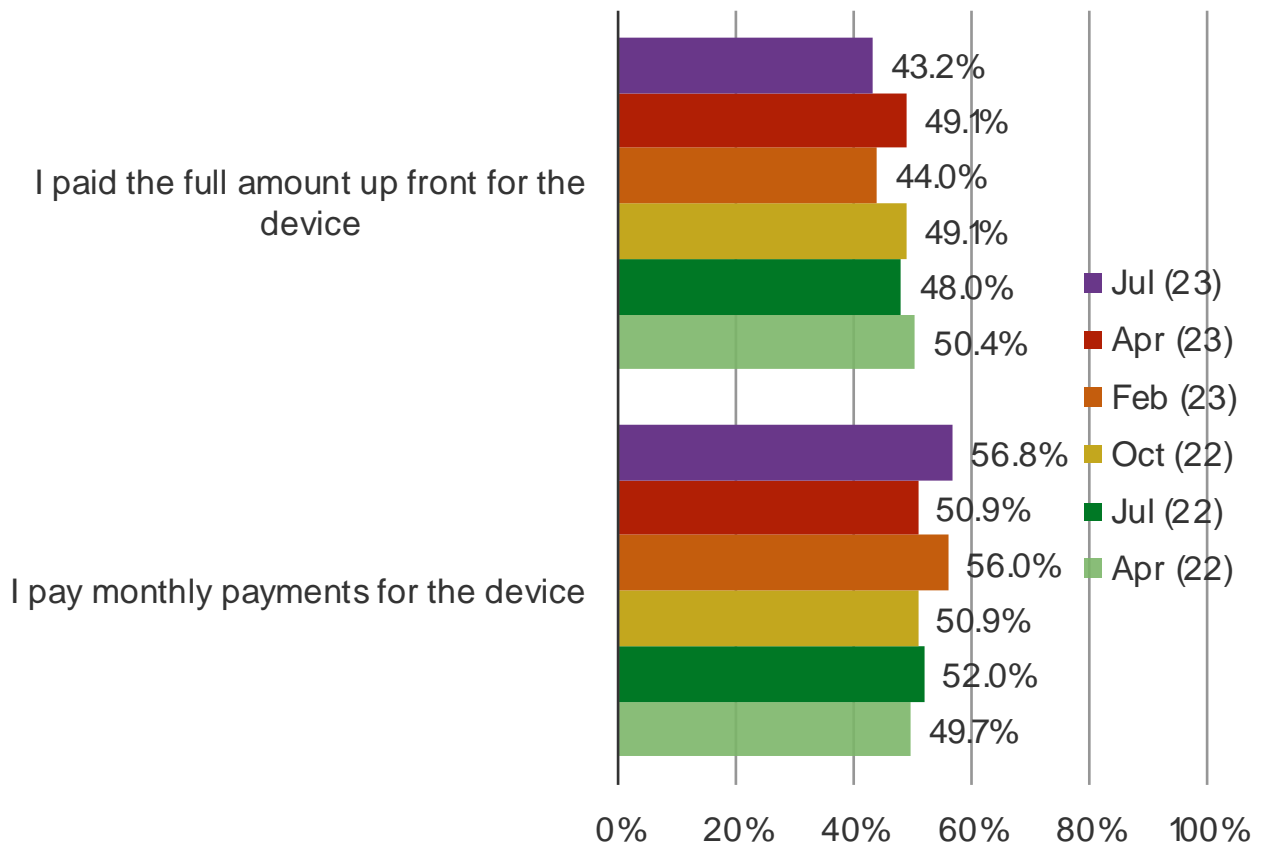
HOW DID YOU PURCHASE YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



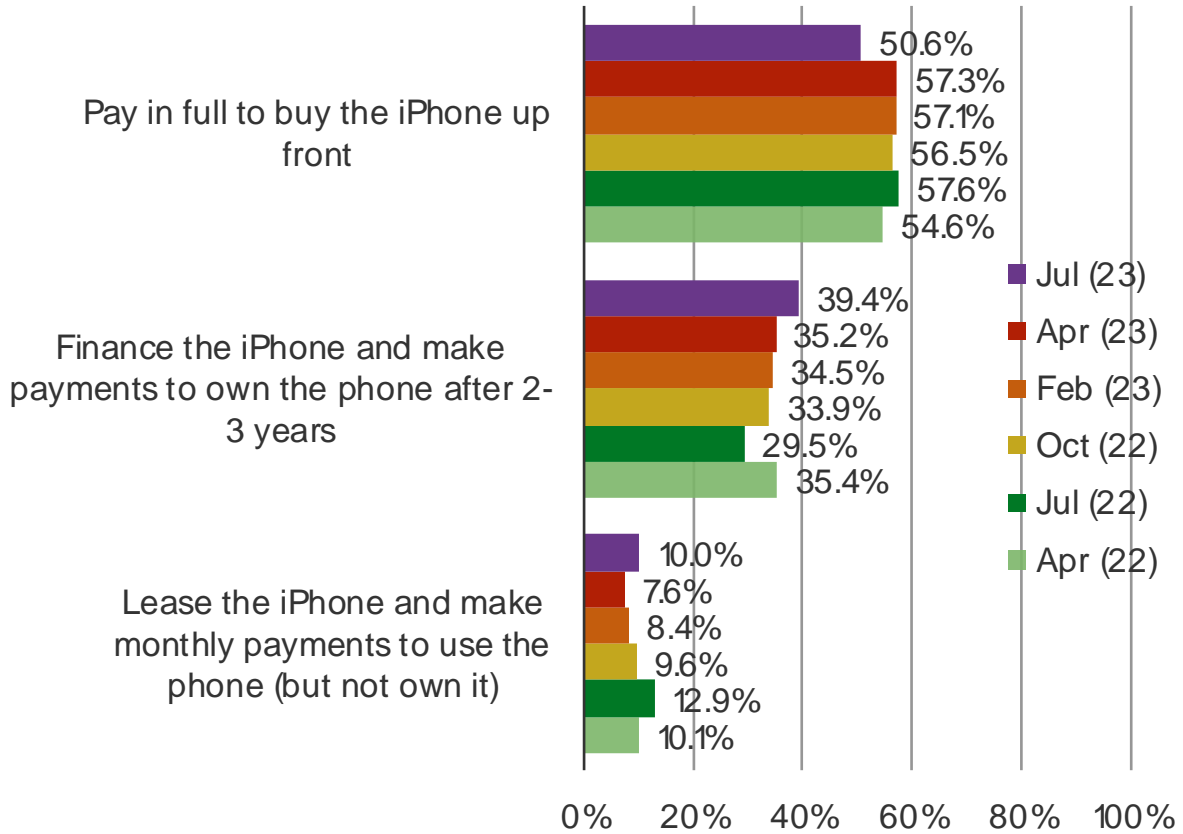
WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU PURCHASED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



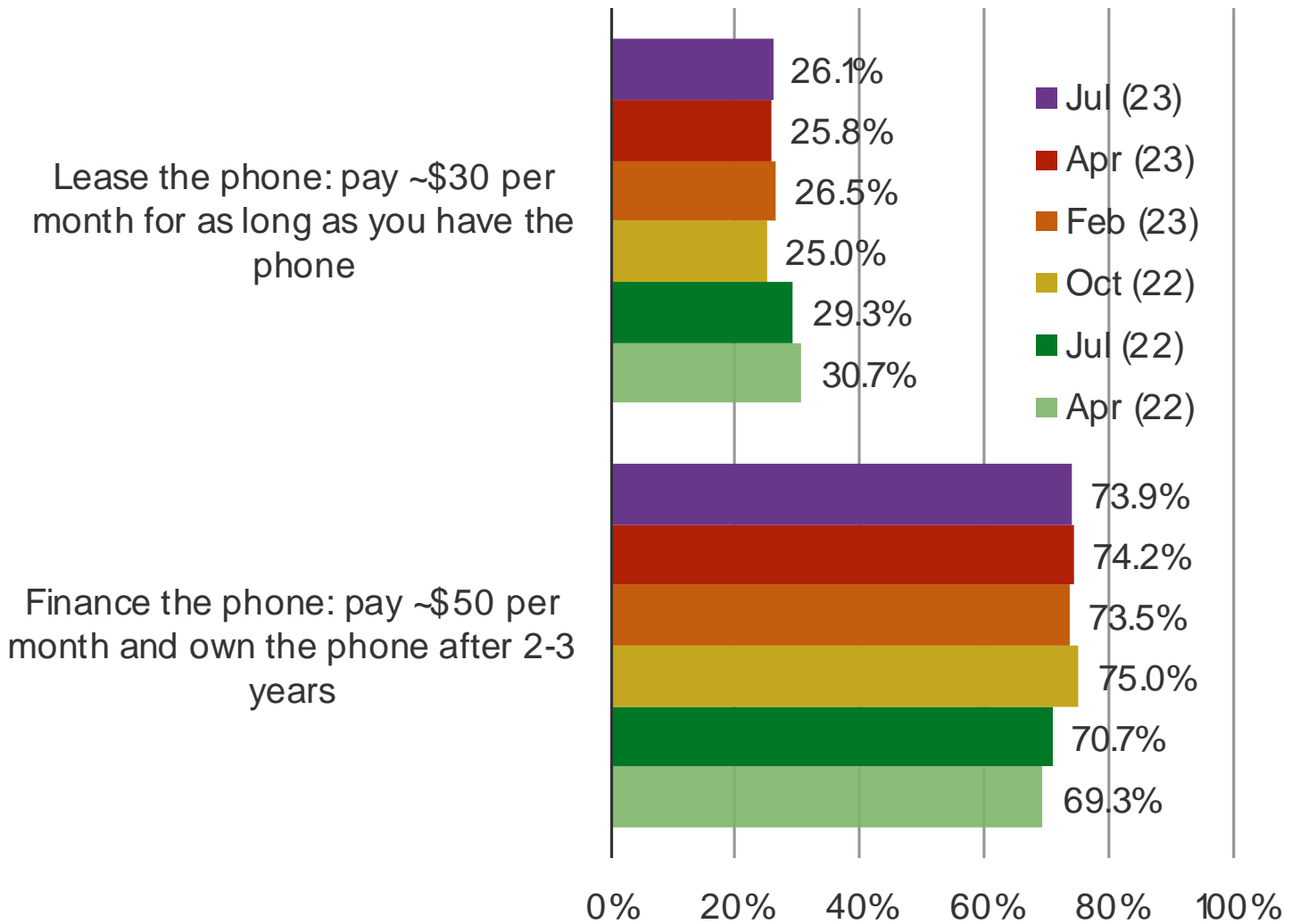
WHICH OF THE FOLLOWING DO YOU THINK WOULD BE A BETTER WAY TO HAVE AN IPHONE?

This question was posed to iPhone owners.



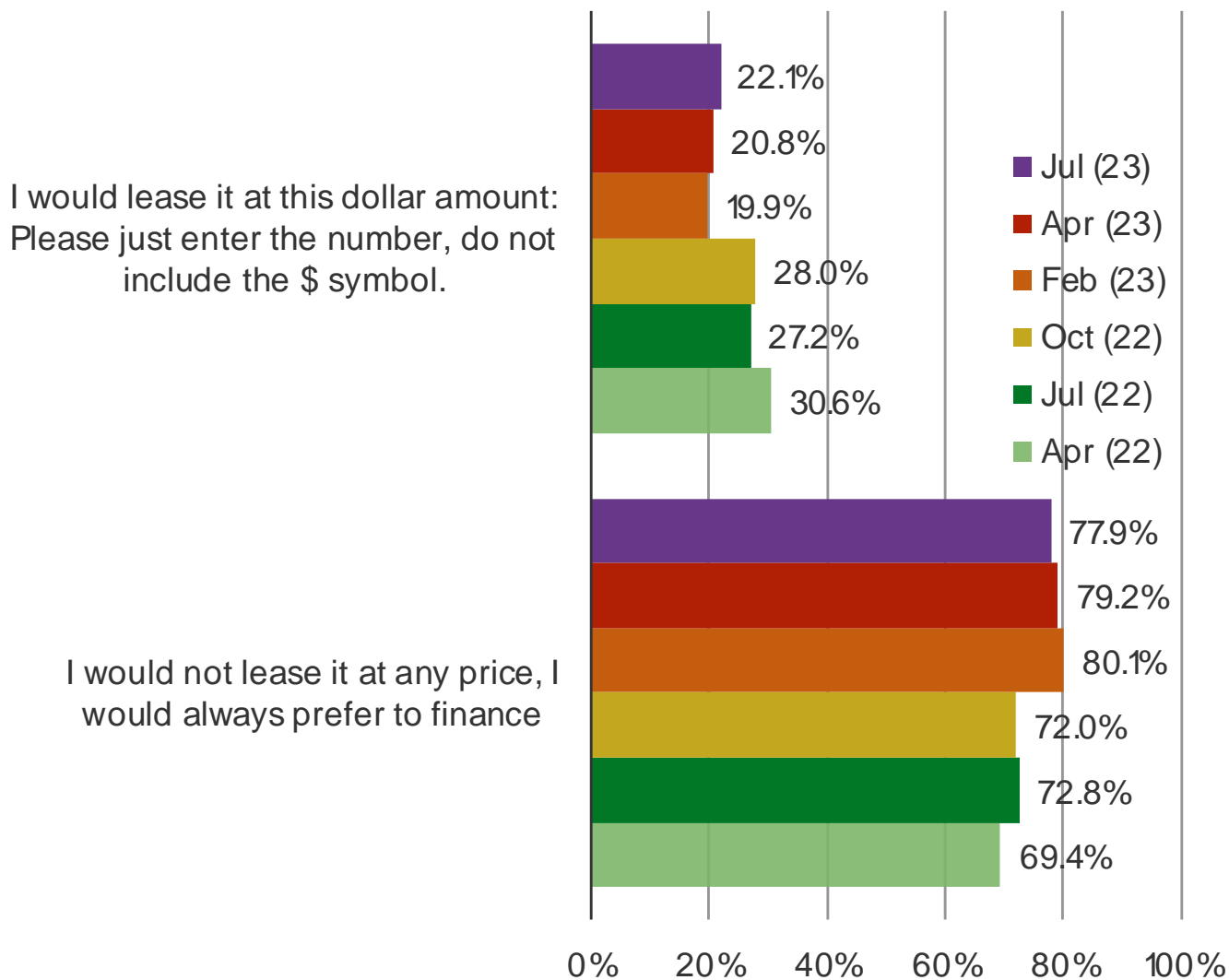
IMAGINE A NEW IPHONE COMES OUT AND YOU WANTED TO GET IT, WHICH WOULD YOU BE MORE LIKELY TO CHOOSE?

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?

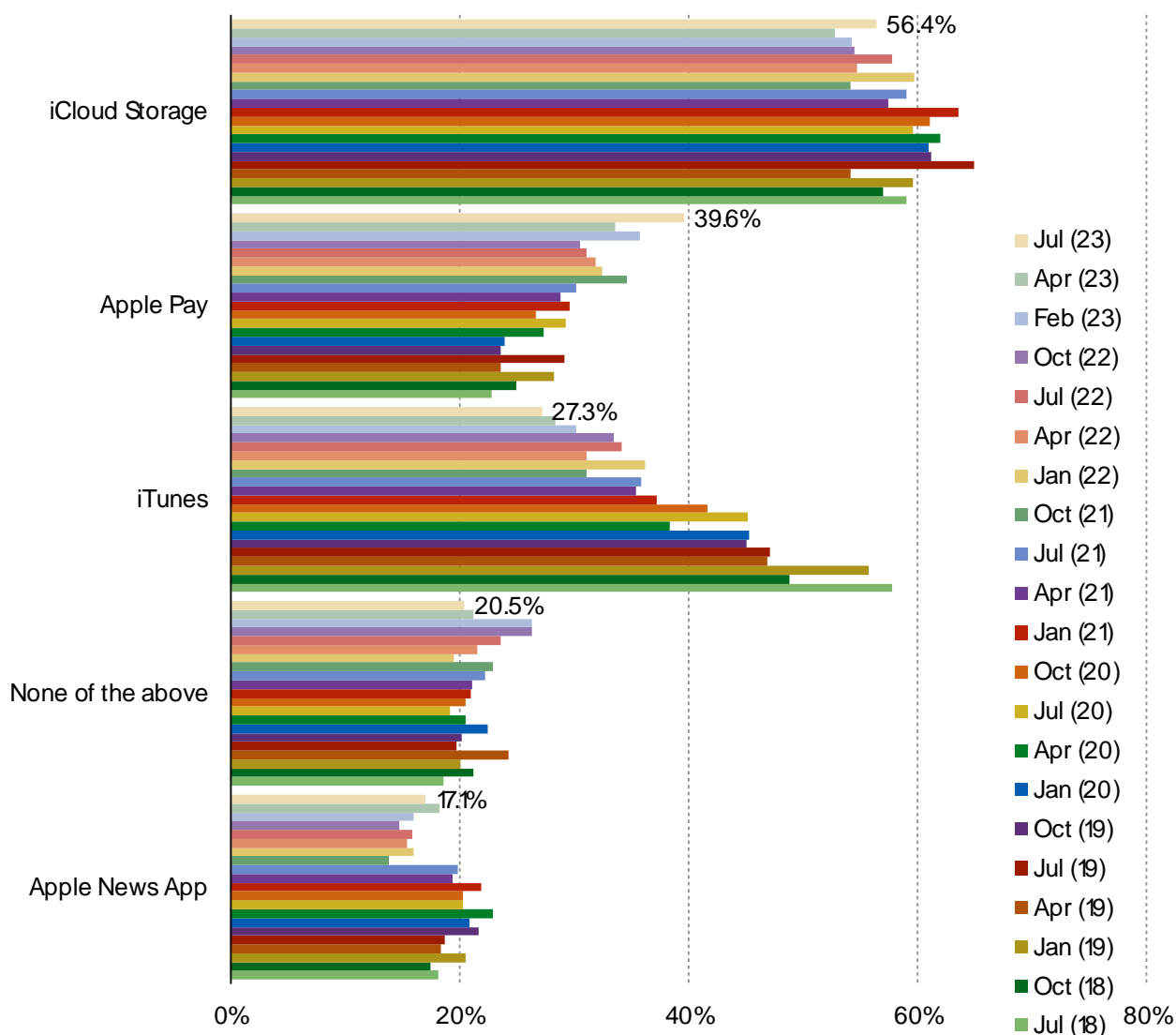
This question was posed to iPhone owners.



AAPL PAY QUESTIONS

HAVE YOU USED ANY OF THE FOLLOWING APPLE SERVICES IN THE PAST MONTH?

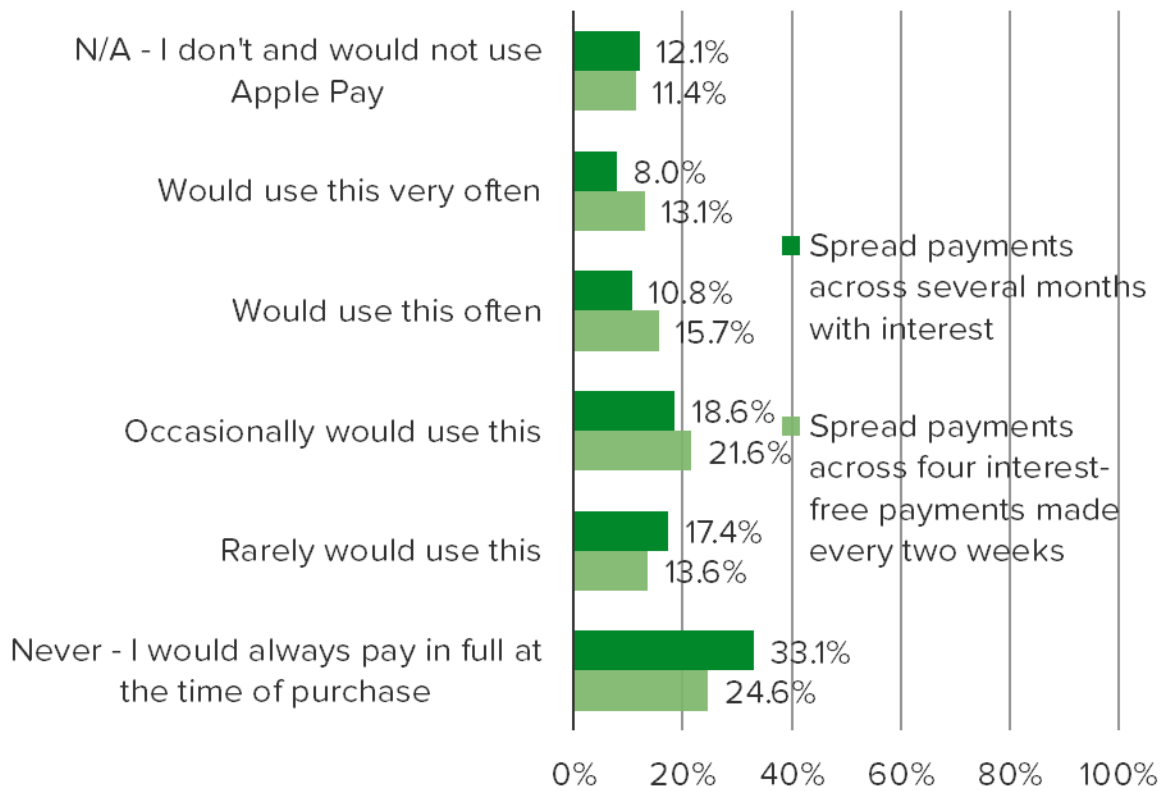
This question was posed to iPhone owners.



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?

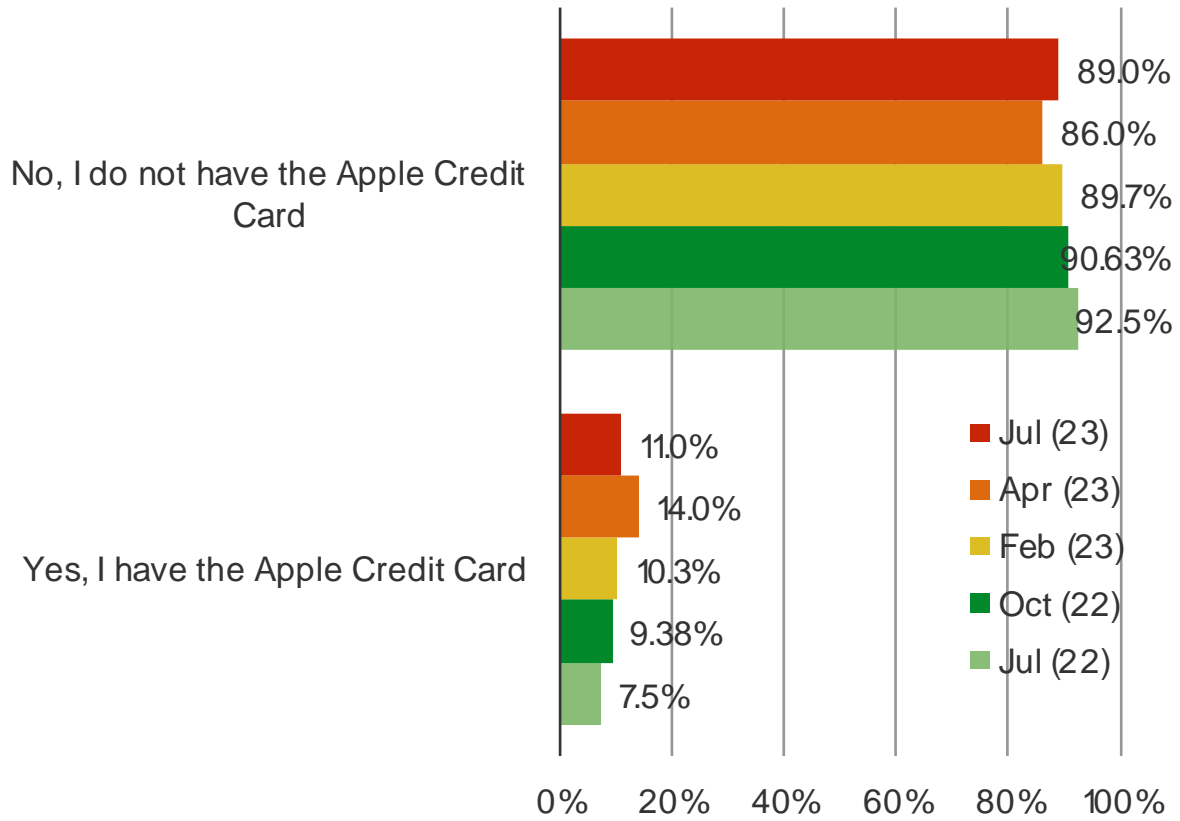
This question was posed to iPhone owners who use Apple Pay.

JULY 2023



DO YOU OWN THE APPLE CREDIT CARD? (PICTURED ABOVE)

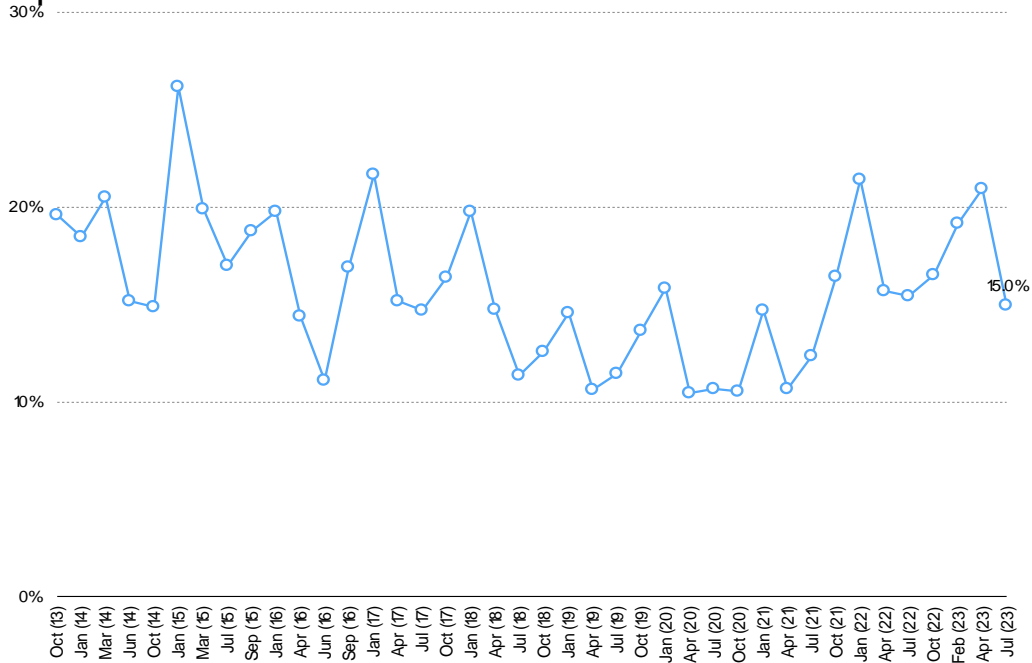
This question was posed to iPhone owners.



IPHONE DYNAMICS

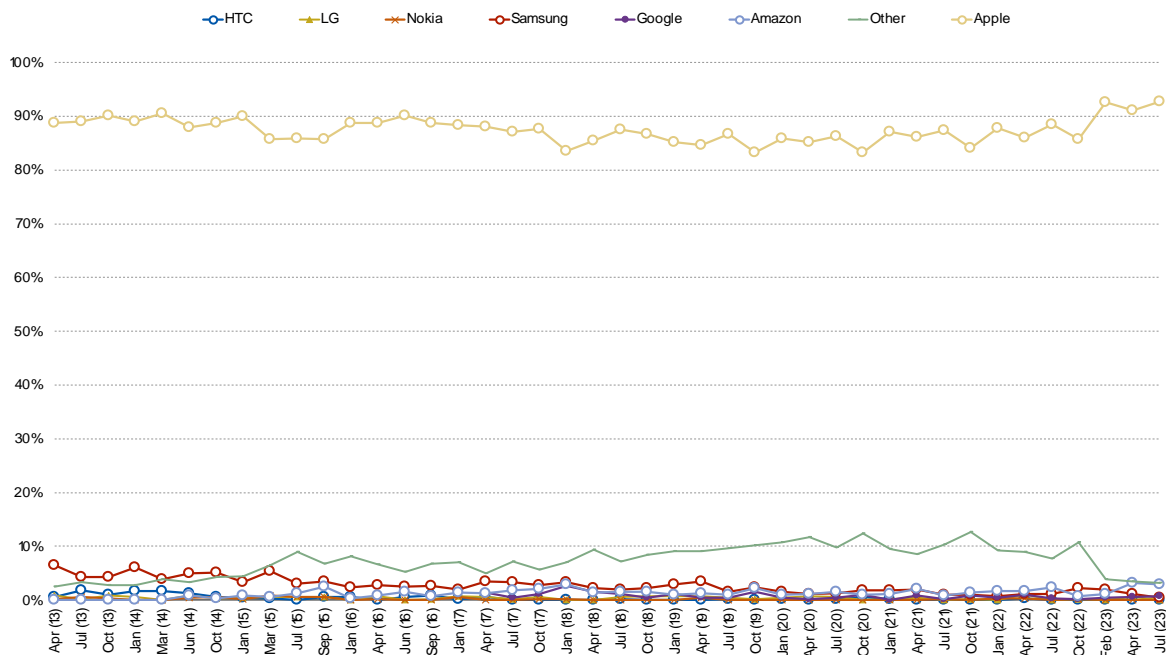
GOT IPHONE WITHIN PAST THREE MONTHS

This question was posed to iPhone owners.



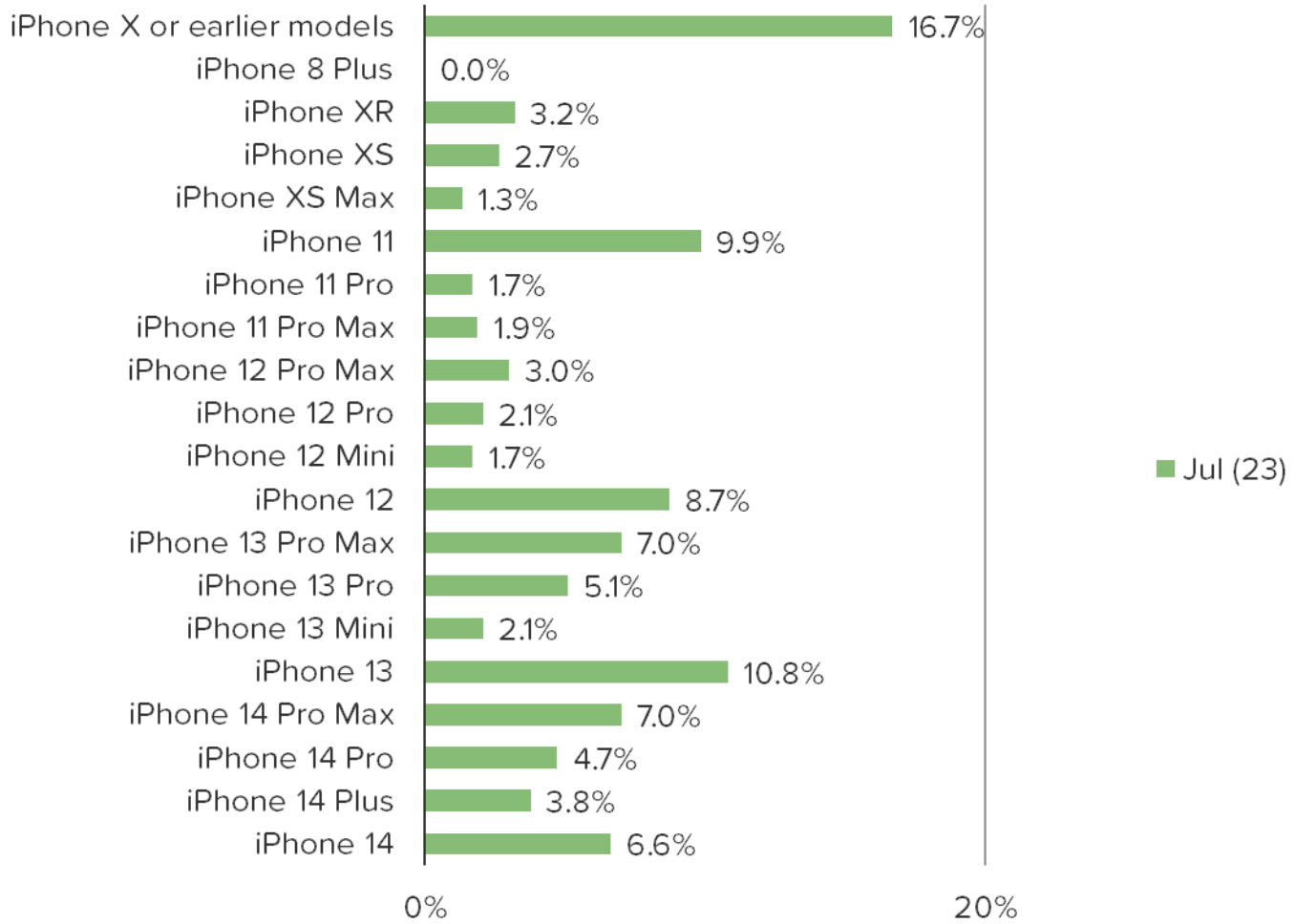
WHICH SMARTPHONE DO YOU PLAN TO GET NEXT?

This question was posed to iPhone owners.



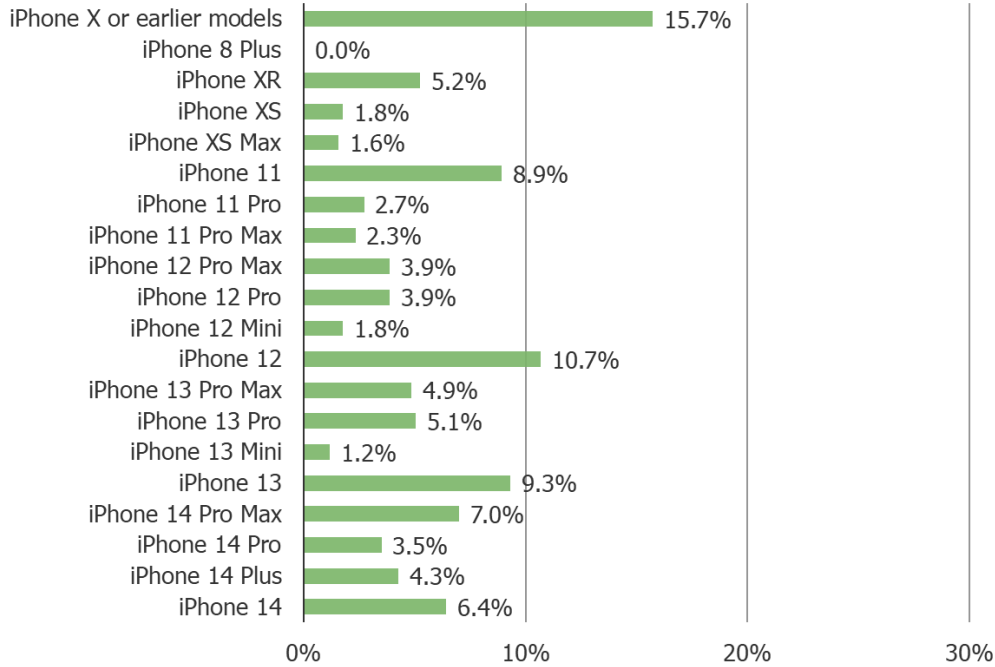
IPHONE MIX – WHICH MODEL DO YOU CURRENTLY OWN?

July 2023

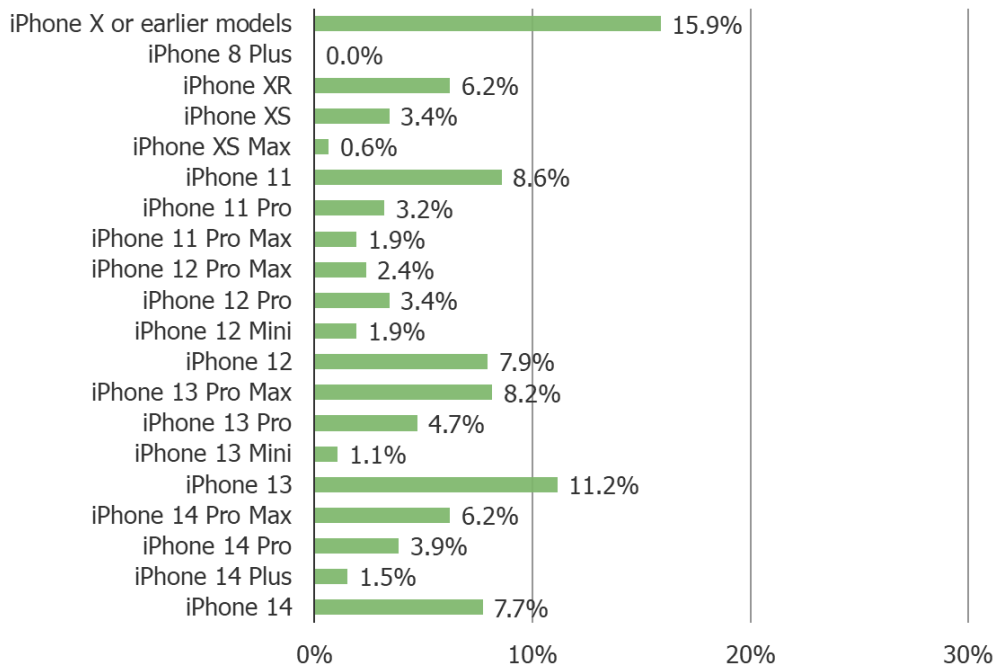


IPHONE MIX – WHICH MODEL DO YOU CURRENTLY OWN?

April 2023



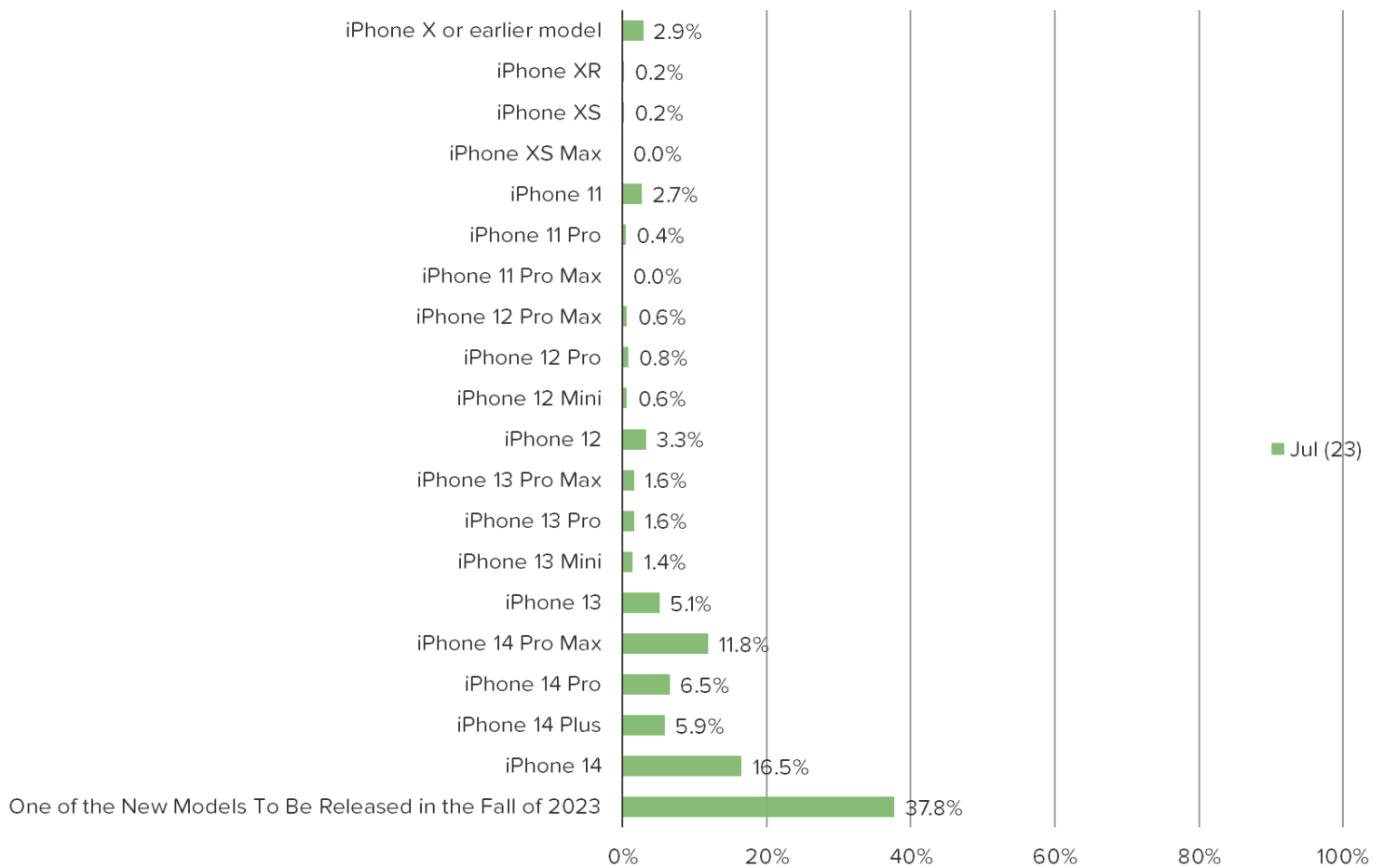
January 2023



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.

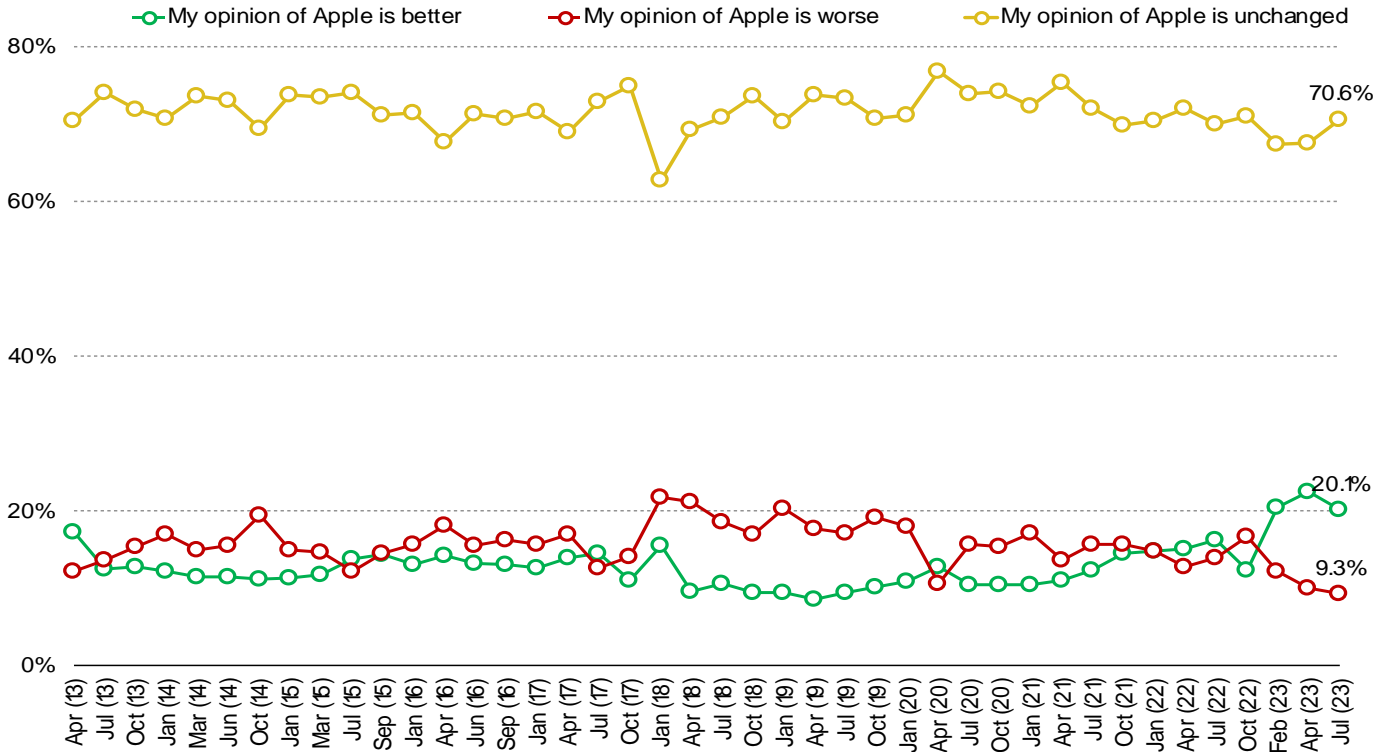
July 2023



CONSUMER SENTIMENT

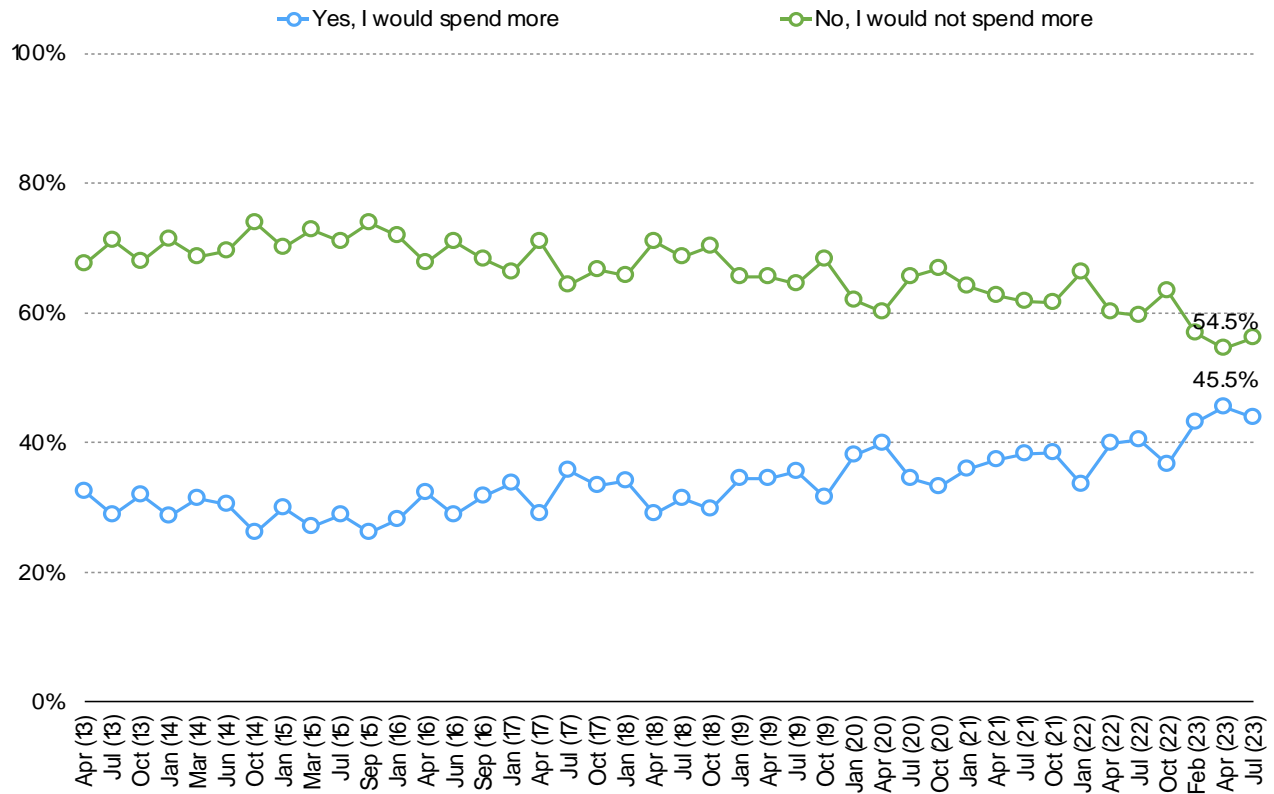
HAS YOUR OPINION OF APPLE CHANGED OVER THE PAST YEAR?

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?

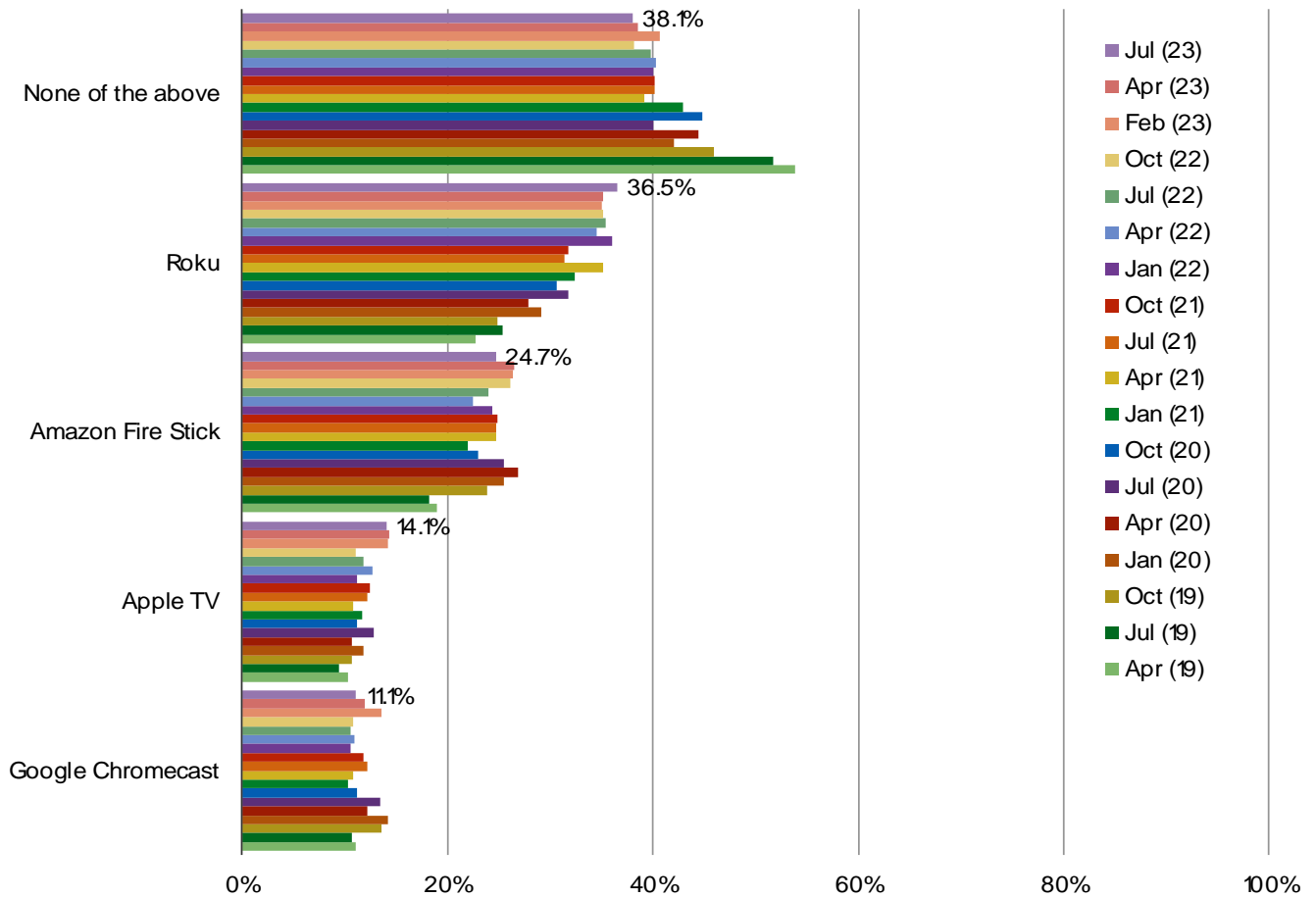
This question was posed to all respondents



STREAMING PLAYERS

DO YOU OWN ANY OF THE FOLLOWING STREAMING PLAYERS?

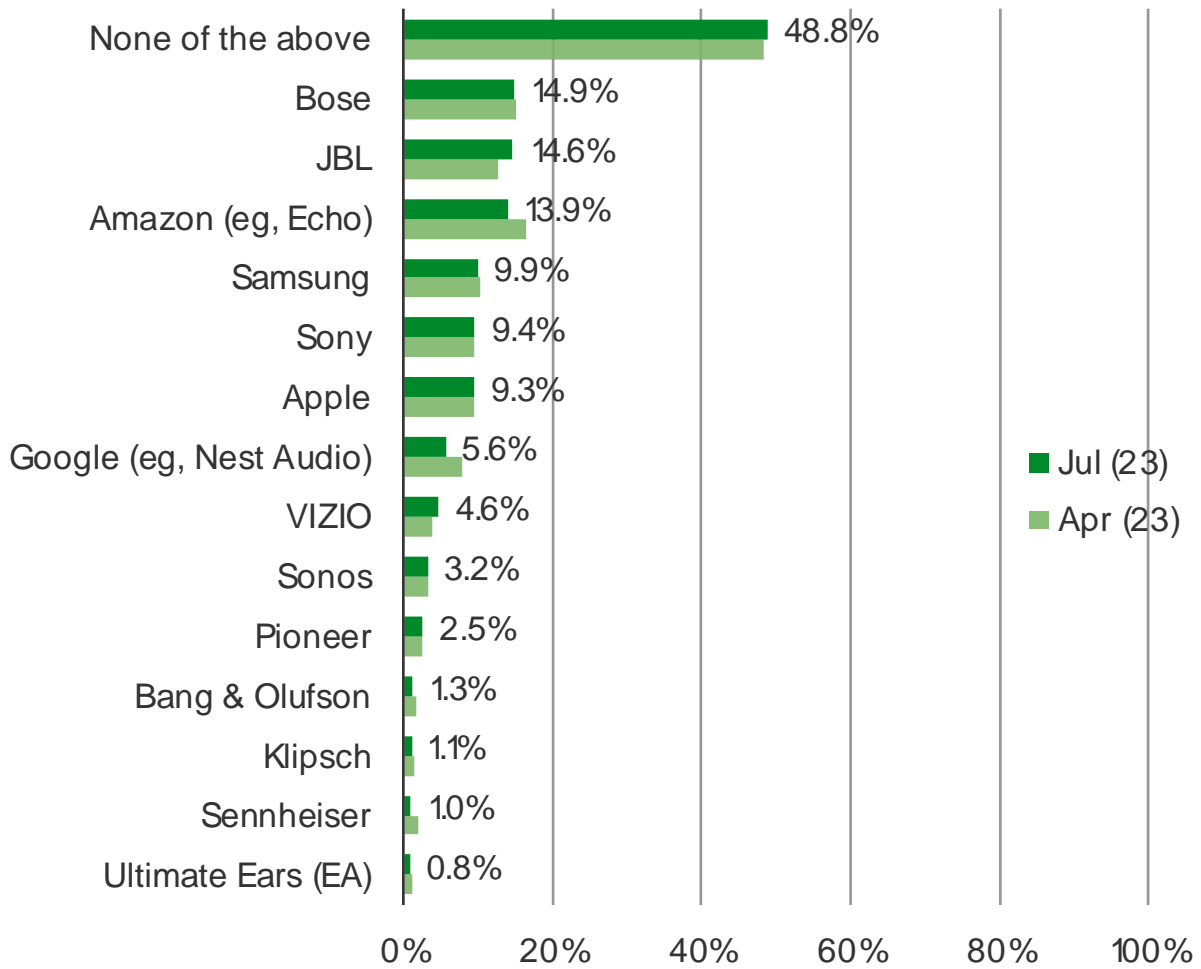
This question was posed to all consumers.



SPEAKERS AND SOUNDBARS

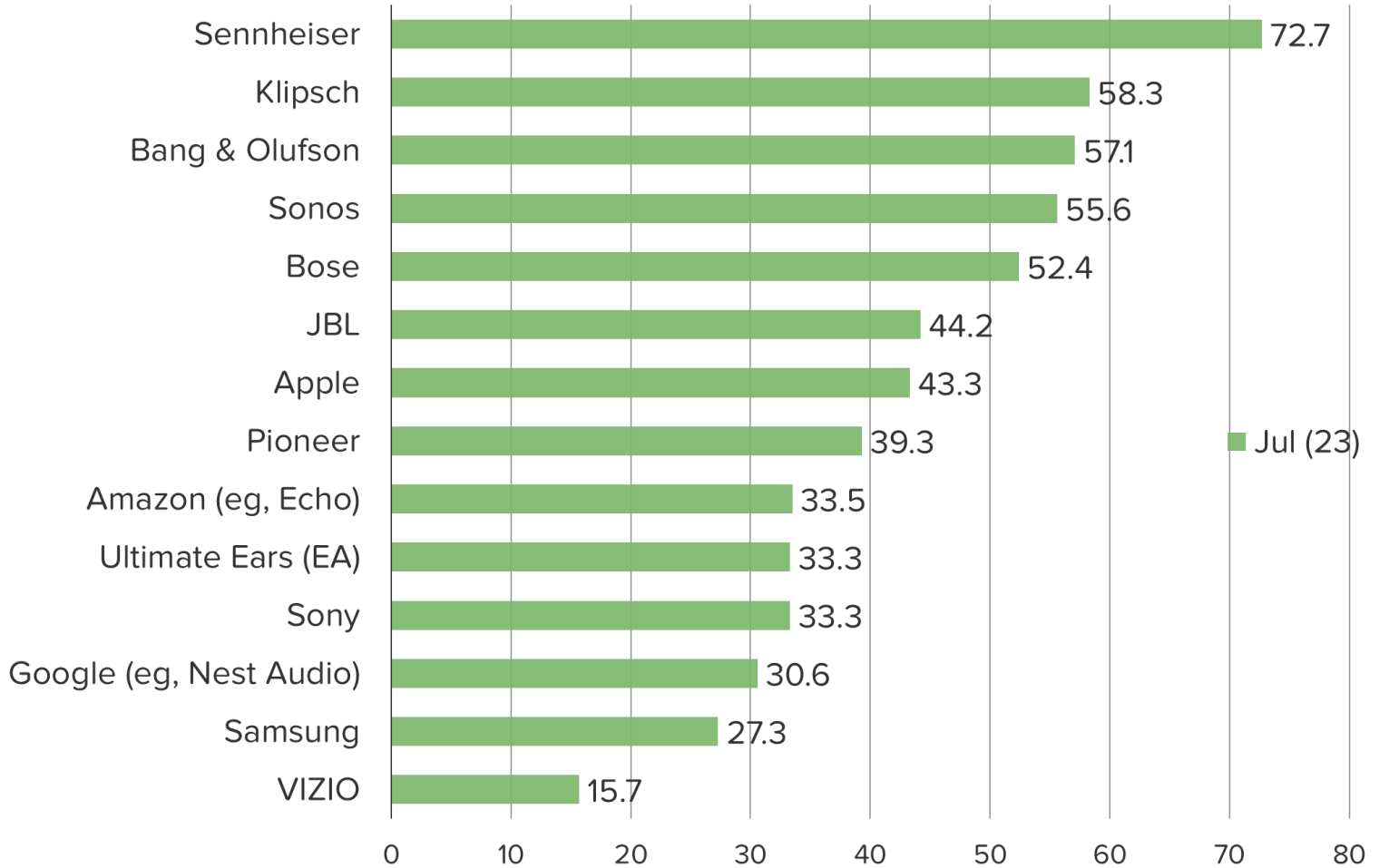
DO YOU OWN ONE OR MORE SPEAKERS FROM THE FOLLOWING BRANDS? SELECT ALL THAT APPLY

This question was posed to all respondents.



HOW LIKELY ARE YOU TO RECOMMEND THE FOLLOWING SPEAKER BRANDS TO A FRIEND OR COLLEAGUE?

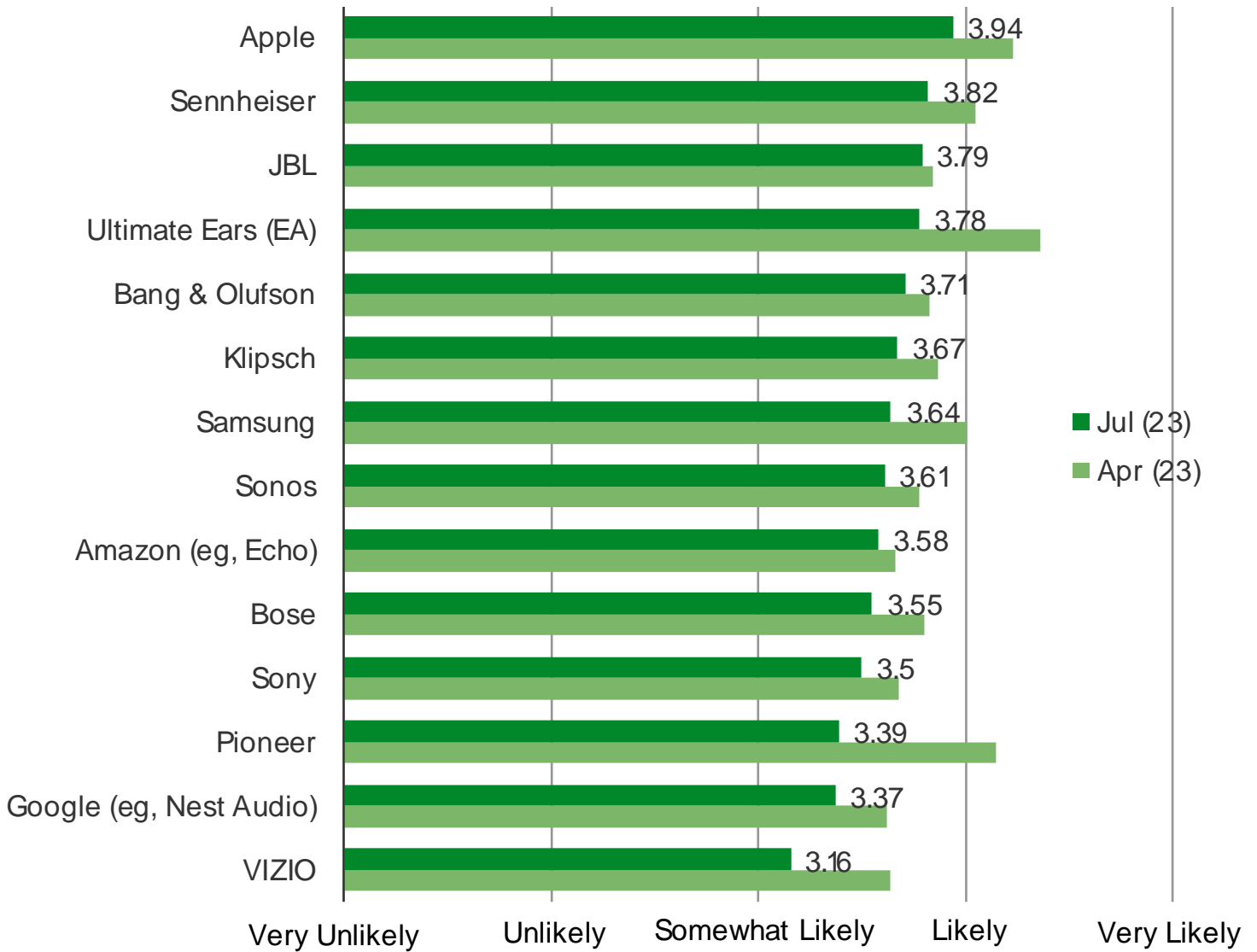
This question was posed to all respondents who own the below.



	N=
Amazon (eg, Echo)	155
Apple	104
Bang & Olufson	14
Bose	166
Google (eg, Nest Audio)	62
JBL	163
Klipsch	12
Pioneer	28
Samsung	110
Sennheiser	11
Sonos	36
Sony	105
Ultimate Ears (EA)	9
VIZIO	51

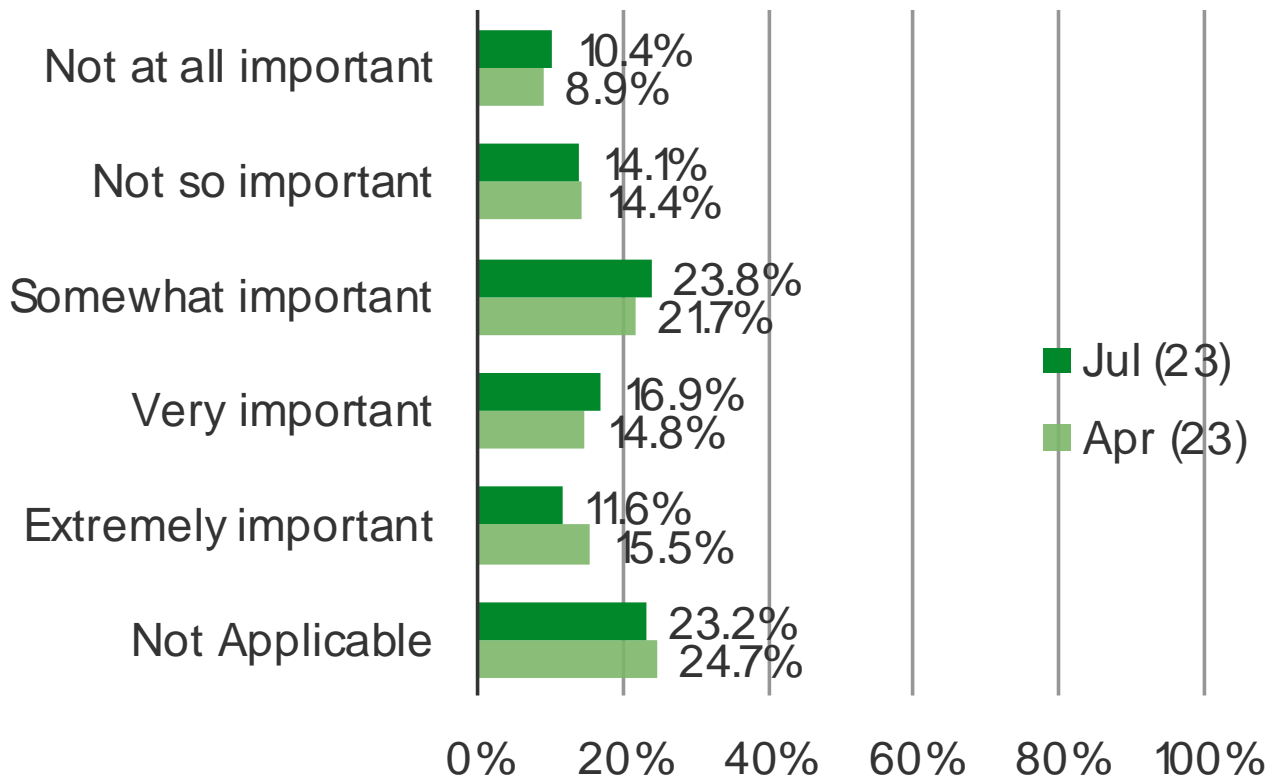
HOW LIKELY ARE YOU TO ADD MORE SPEAKERS FROM THIS BRAND TO YOUR HOME IN THE FUTURE?

This question was posed to all respondents who own the below.



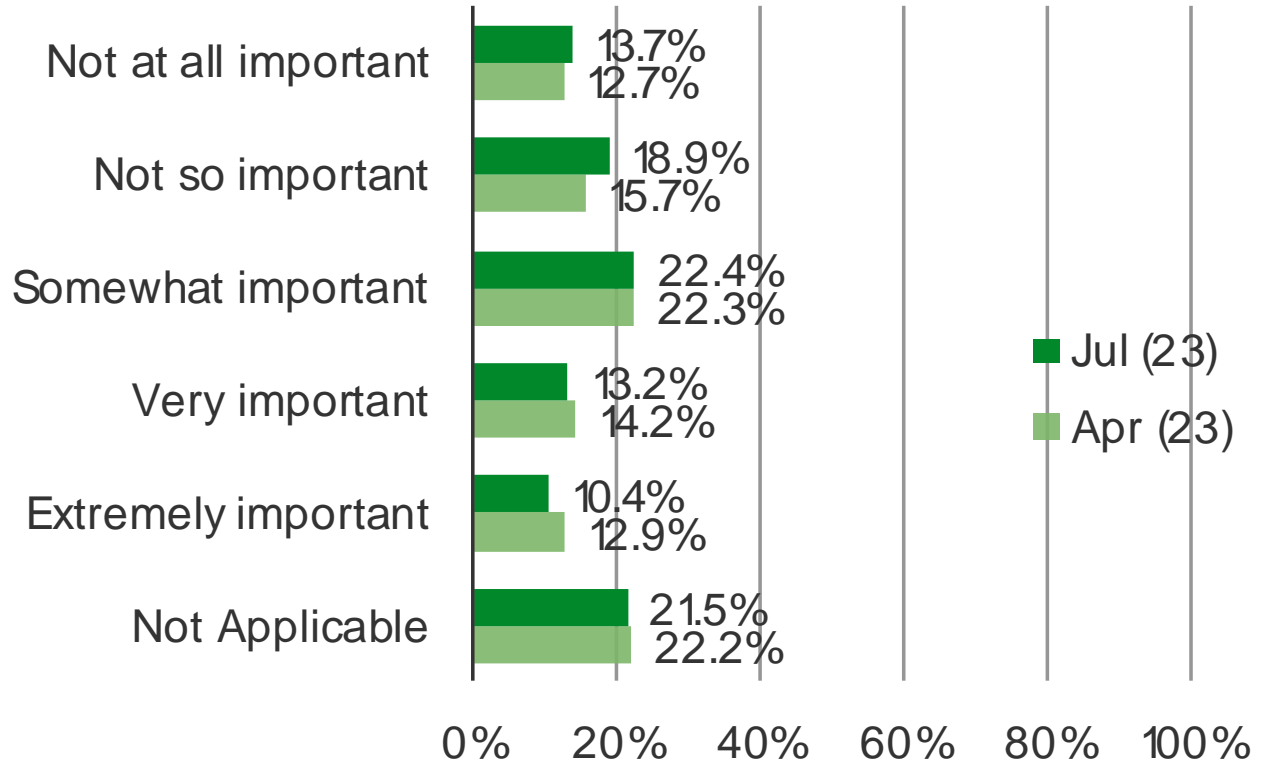
WHEN YOU BUY SPEAKERS, HOW IMPORTANT IS IT TO YOU THAT IT HAS MULTI-ROOM/MULTI-SPEAKER CONNECTIVITY? (IE A SPEAKER THAT HAS CONNECTIVITY TO OTHER SPEAKERS TO PLAY THE SAME SONG/AUDIO AT THE SAME TIME ACROSS SPEAKERS THROUGHOUT THE HOUSE)?

This question was posed to all respondents.



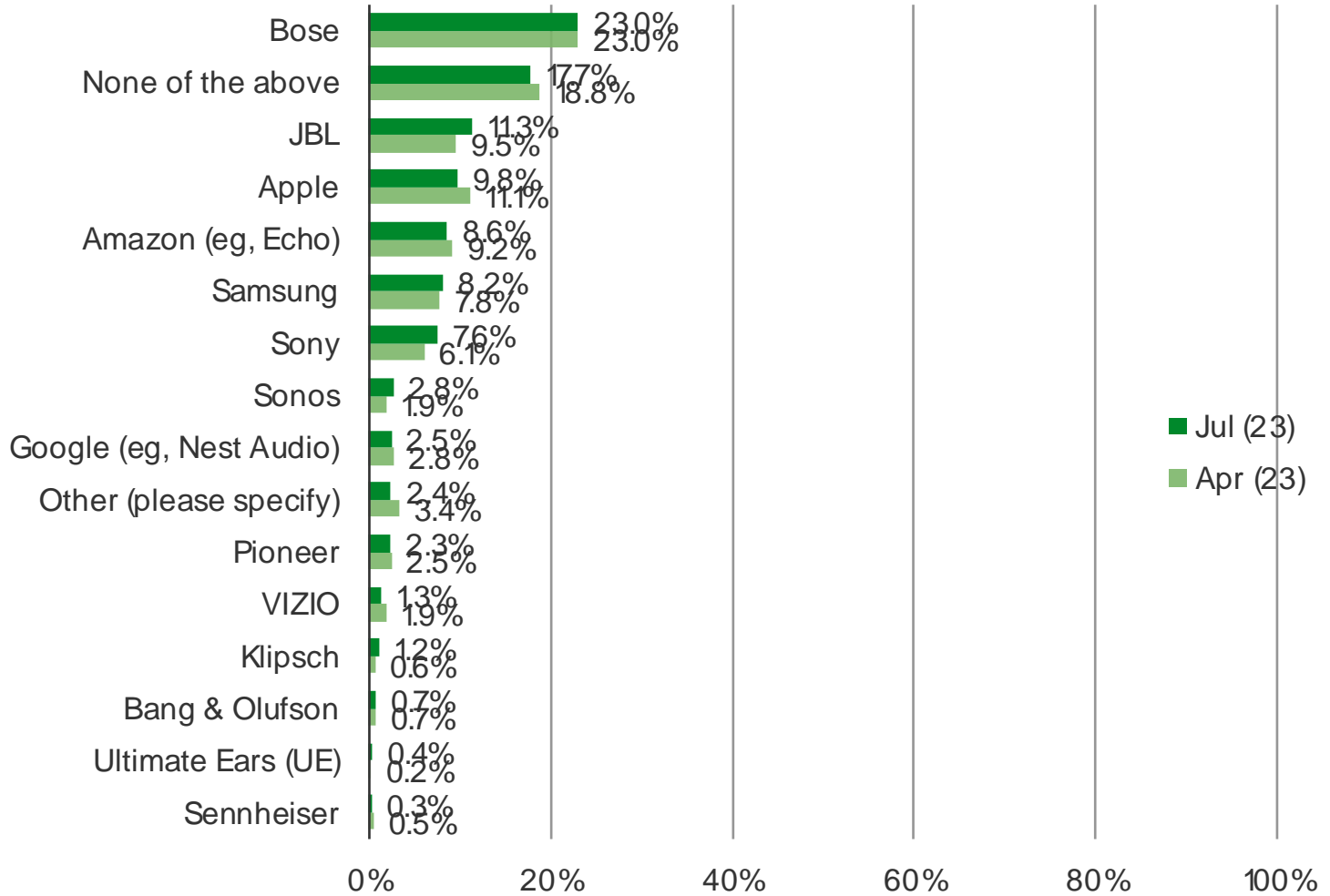
HOW IMPORTANT IS IT TO YOU TO USE ONE SINGLE BRAND OF SPEAKERS THROUGHOUT YOUR HOME?

This question was posed to all respondents.



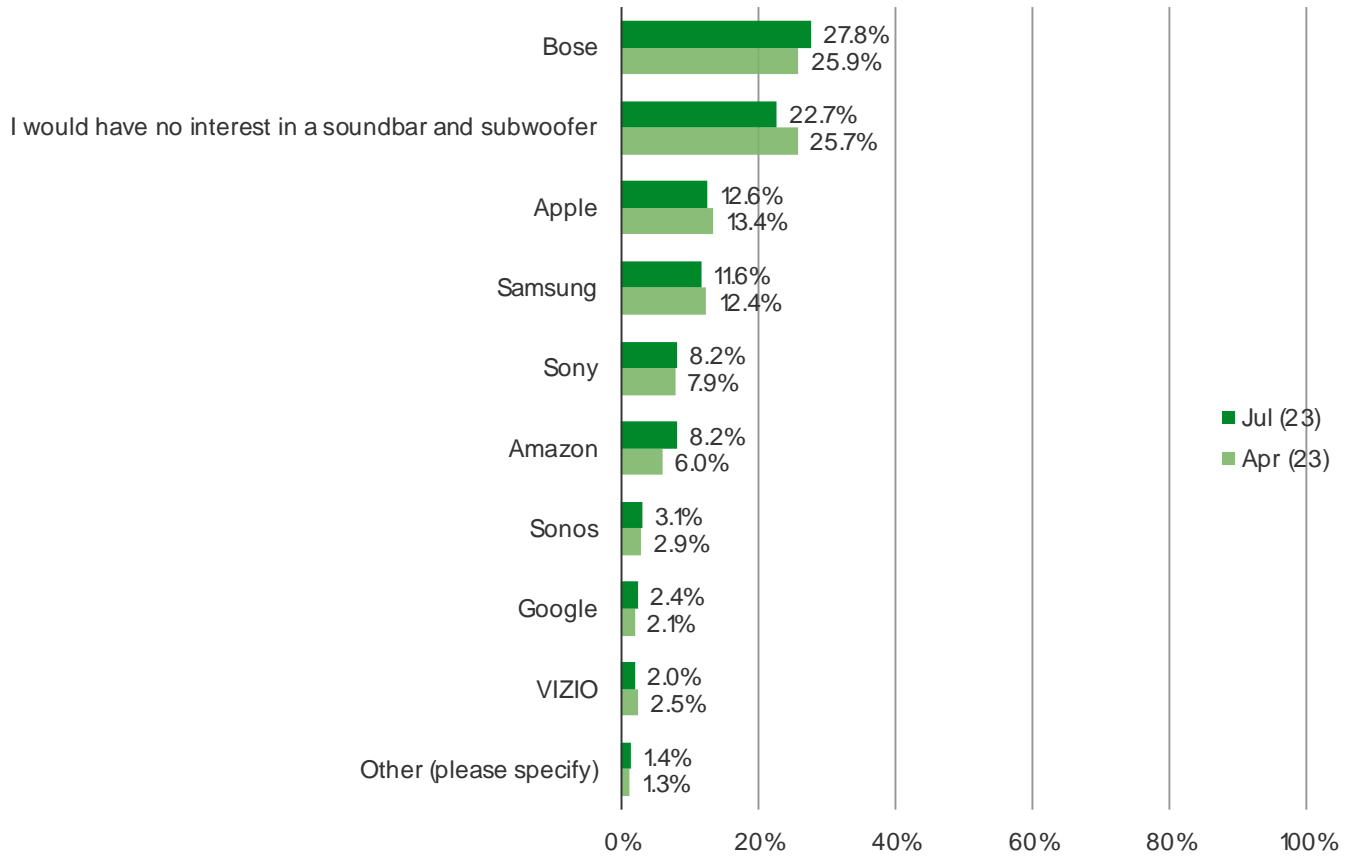
IF YOU WERE BUYING A NEW SPEAKER TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

This question was posed to all respondents.



ASSUMING ALL OF THESE BRANDS HAD A SOUNDBAR AND SUBWOOFER OPTION, WHICH WOULD YOU BE THE MOST LIKELY TO PURCHASE?

This question was posed to all respondents.

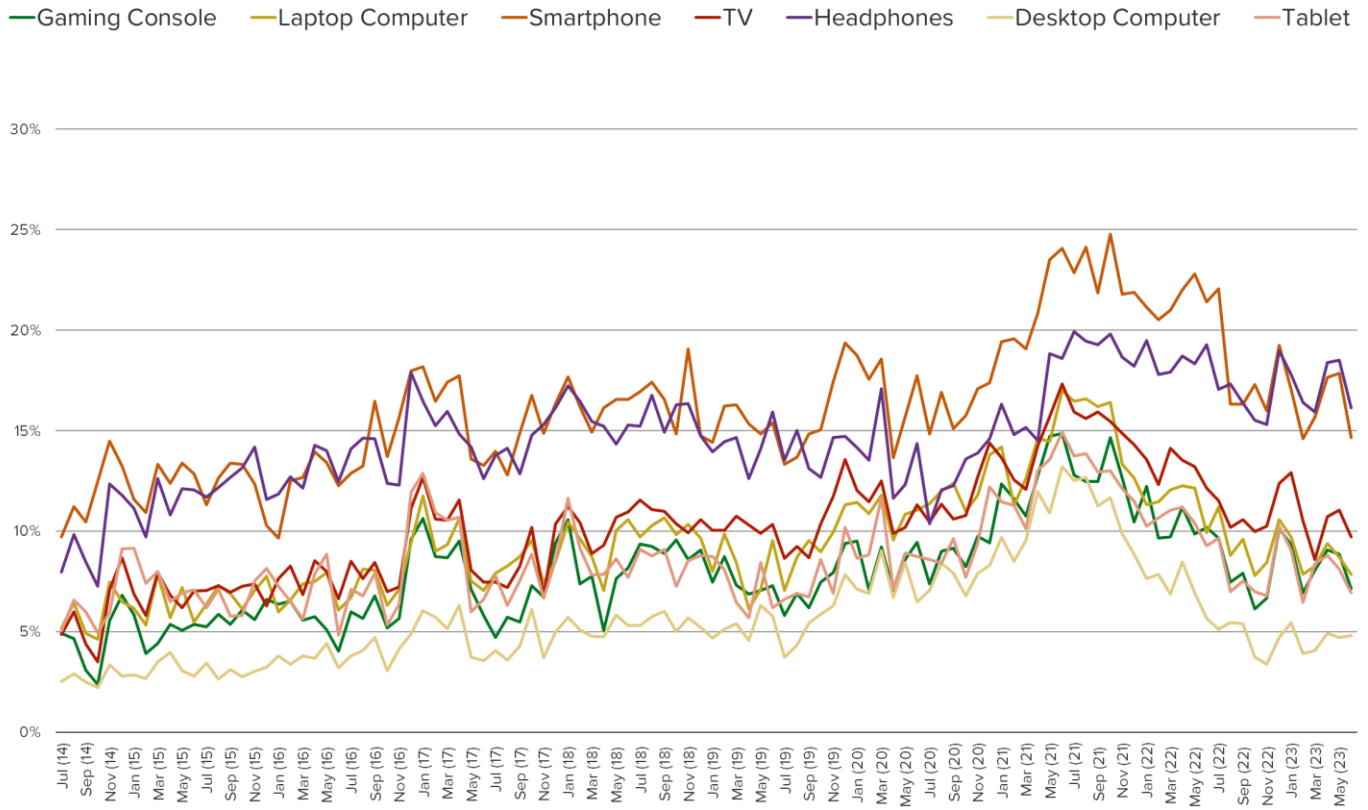


MONTHLY DATA

CONSUMER ELECTRONICS ENGAGEMENT

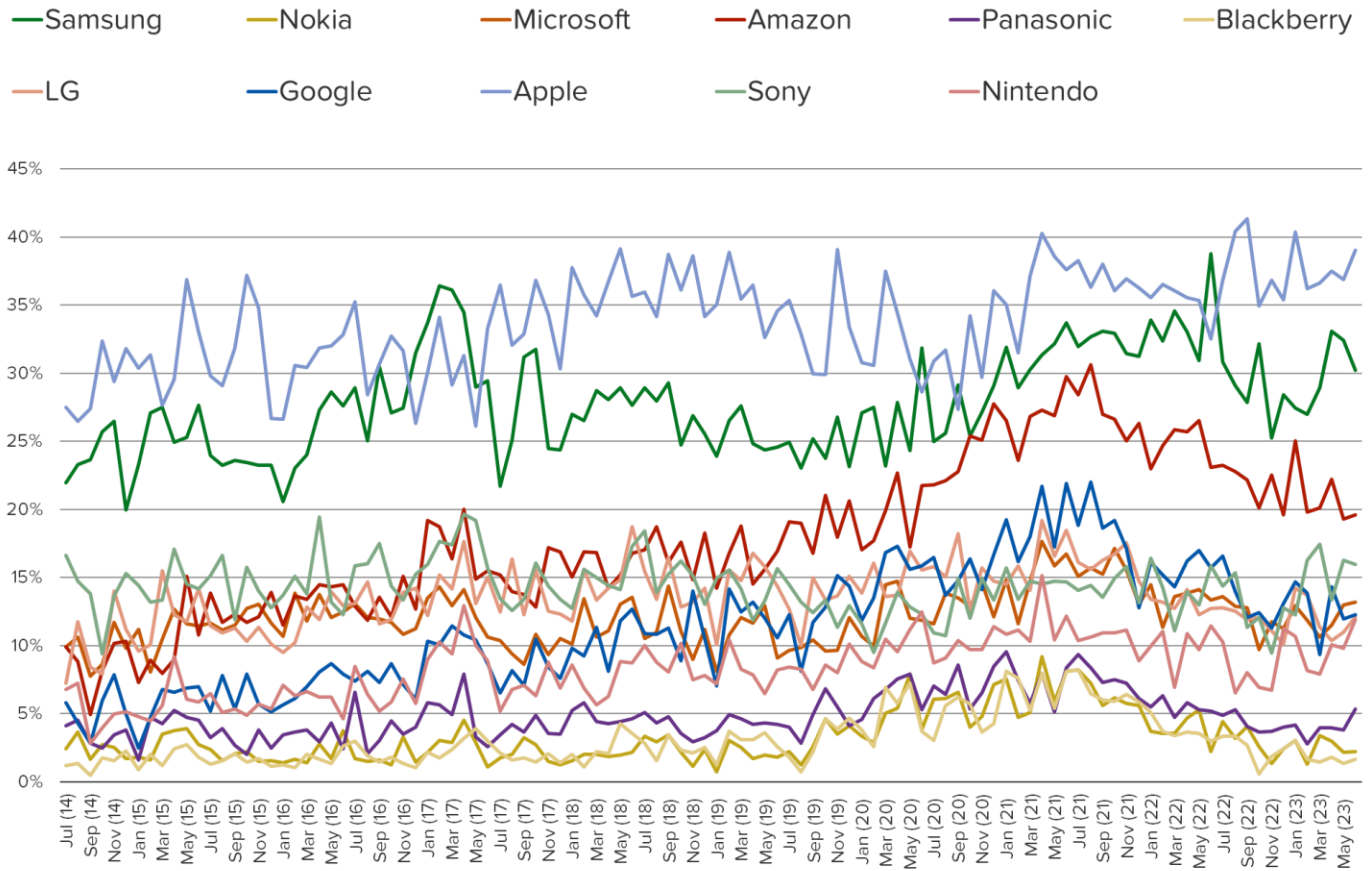
HAVE YOU PURCHASED ANY OF THE FOLLOWING CONSUMER ELECTRONICS PRODUCTS IN THE PAST MONTH?

This question was posed to all respondents.



WHICH COMPANY OR COMPANIES MANUFACTURE THE CONSUMER ELECTRONICS PRODUCTS THAT YOU PURCHASED IN THE PAST MONTH?

This question was posed to all respondents.



DO YOU PLAN TO PURCHASE ANY OF THE FOLLOWING CONSUMER ELECTRONIC PRODUCTS IN THE NEXT MONTH?

This question was posed to all respondents.

