

Bespoke Survey Research

January 2024

Consumer Electronics

Volume 44 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: AAPL, AMZN, GOOG, Samsung.

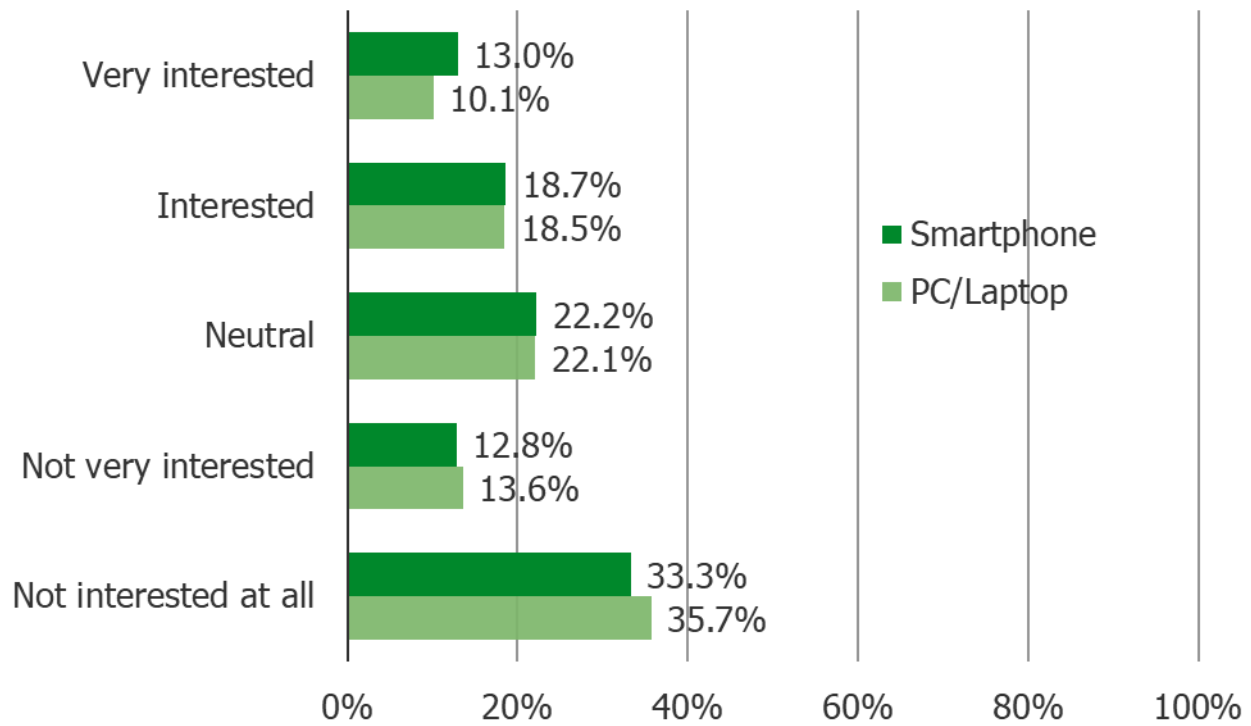
Key Takeaways:

- ❑ Consumers who use AI chatbots describe a range of different activities that they use them for (a smattering of information, asking questions, entertainment/if they are bored, work or school related help, etc).
- ❑ Based on our reading of fill-in responses, there is a mixture of hope for possible applications around AI and caution/fear around possible risks that could materialize from AI. A relatively low percentage (7.7%) of consumers said they would buy a new smartphone or laptop today if those devices worked better with AI related apps. At the same time, only 35.6% said they would never do that. In between, the majority of respondents either said possible in the future depending on what AI could do for them (35%) or not right now based on their current use case for AI (21.8%).
- ❑ Smartphone refresh cycle length has shown some improvement in recent years relative to series worsts.
- ❑ Apple Market share trends have been generally positive and favorable throughout our survey. In this latest wave, trends improved relative to our October edition.
- ❑ The share of iPhone users who utilize Apple Pay and Apple Music has increased considerably over the history of our survey. More than half of iPhone owners say they use iCloud storage, but self-reported iCloud usage has softened a bit sequentially relative to prior years.
- ❑ The share of iPhone owners who got their iPhone during the past three months improved slightly q/q and y/y.
- ❑ Over the past year in particular, our survey has detected an improvement in sentiment toward Apple (overall, willingness to pay a premium for their products, etc).

NEW QUESTIONS

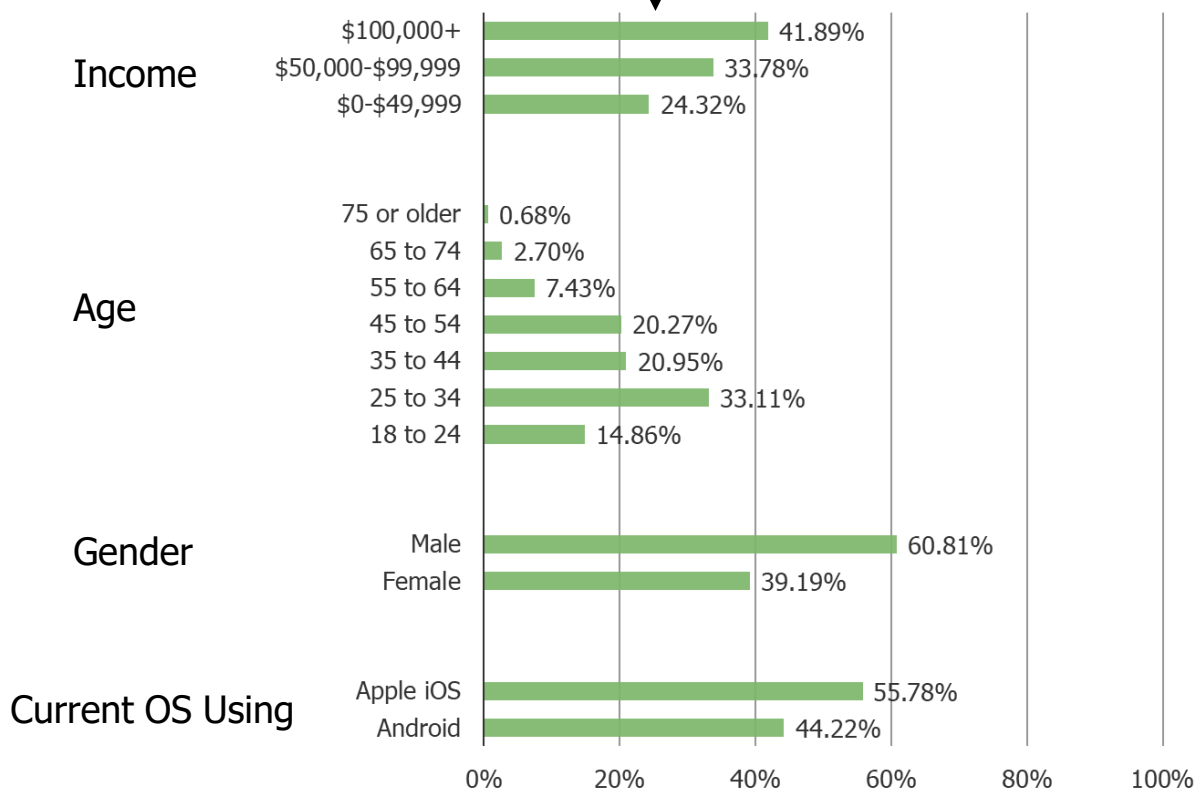
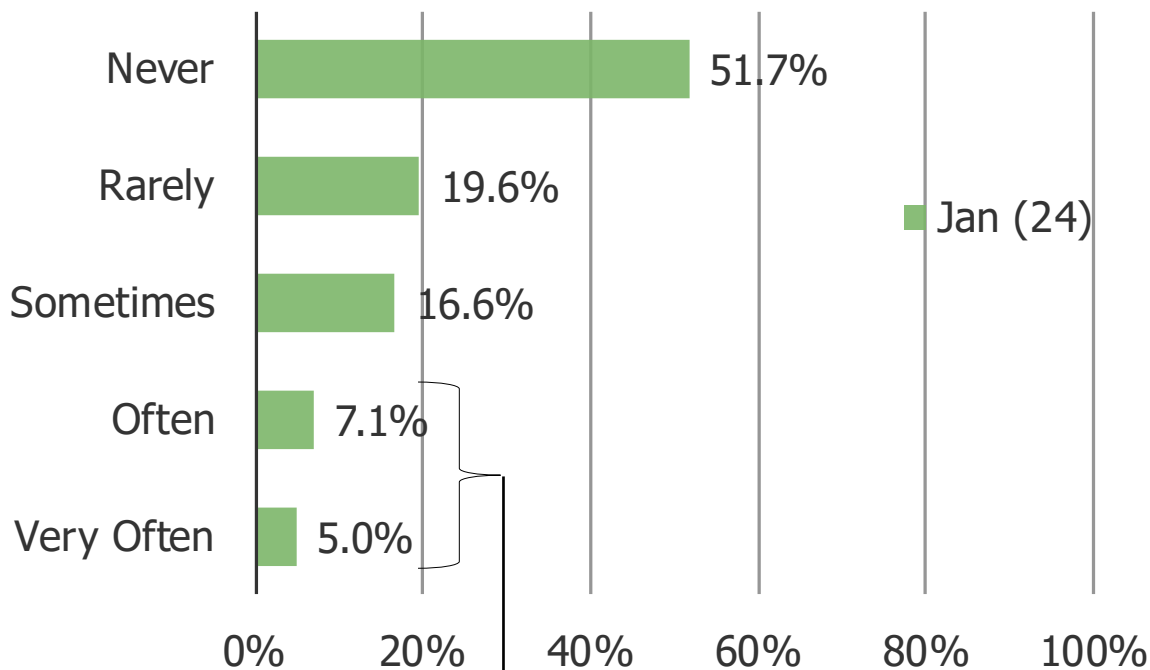
HOW INTERESTED ARE YOU IN USING AI (ARTIFICIAL INTELLIGENCE) CHATBOTS AND APPS, LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, ETC) WHILE USING THE FOLLOWING DEVICES...

This question was posed to all respondents.



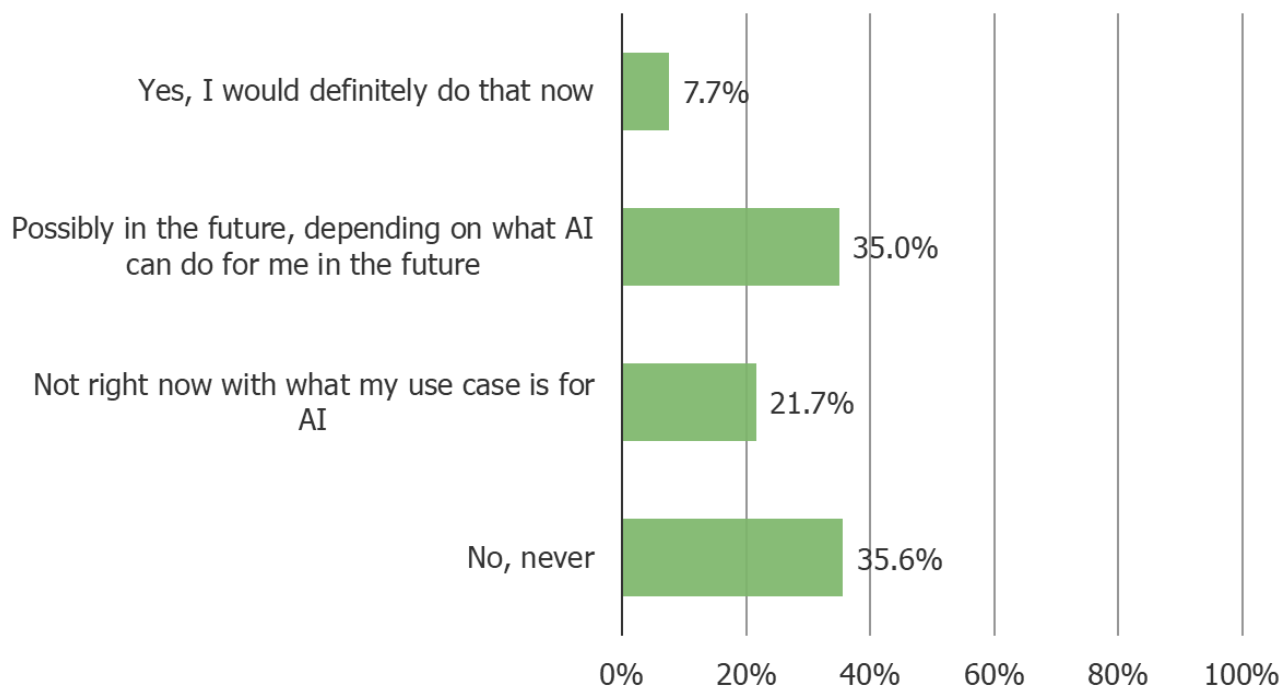
HOW OFTEN DO YOU USE AI CHATBOTS LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, OR OTHERS IN YOUR LIFE?

This question was posed to all respondents.

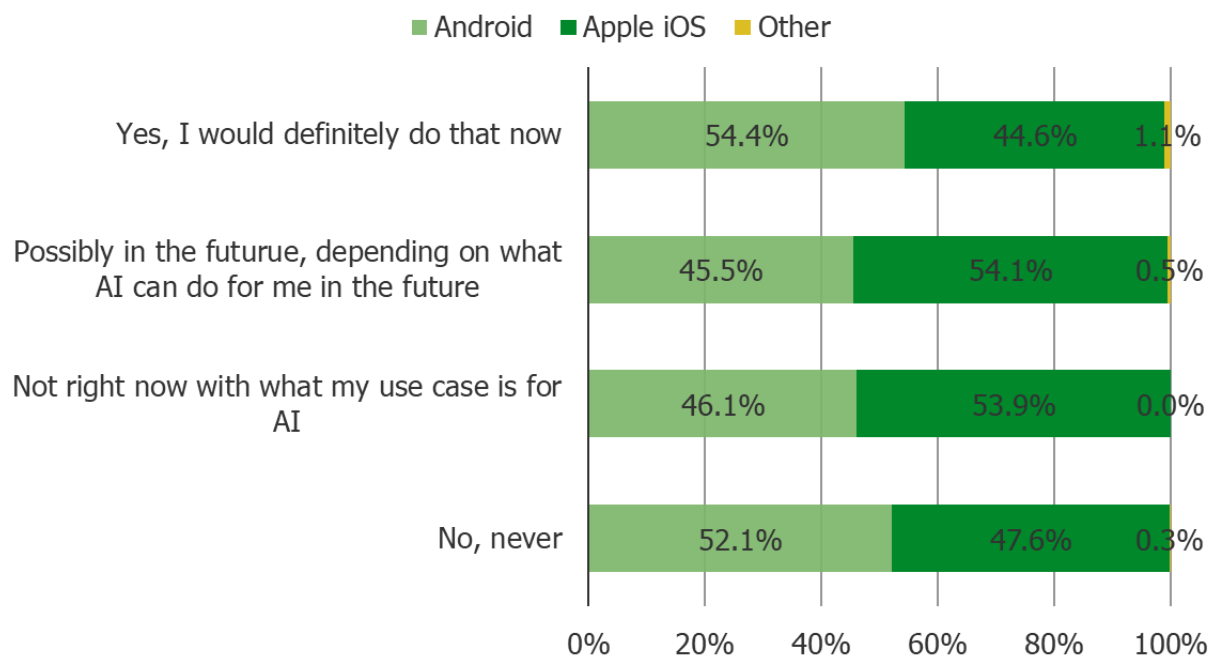


COULD YOU EVER SEE YOURSELF GOING OUT AND BUYING A NEW SMARTPHONE OR LAPTOP IF THOSE DEVICES WERE ABLE TO WORK BETTER WITH AI RELATED APPS THAN THE EXISTING ONES YOU OWN?

This question was posed to all respondents.

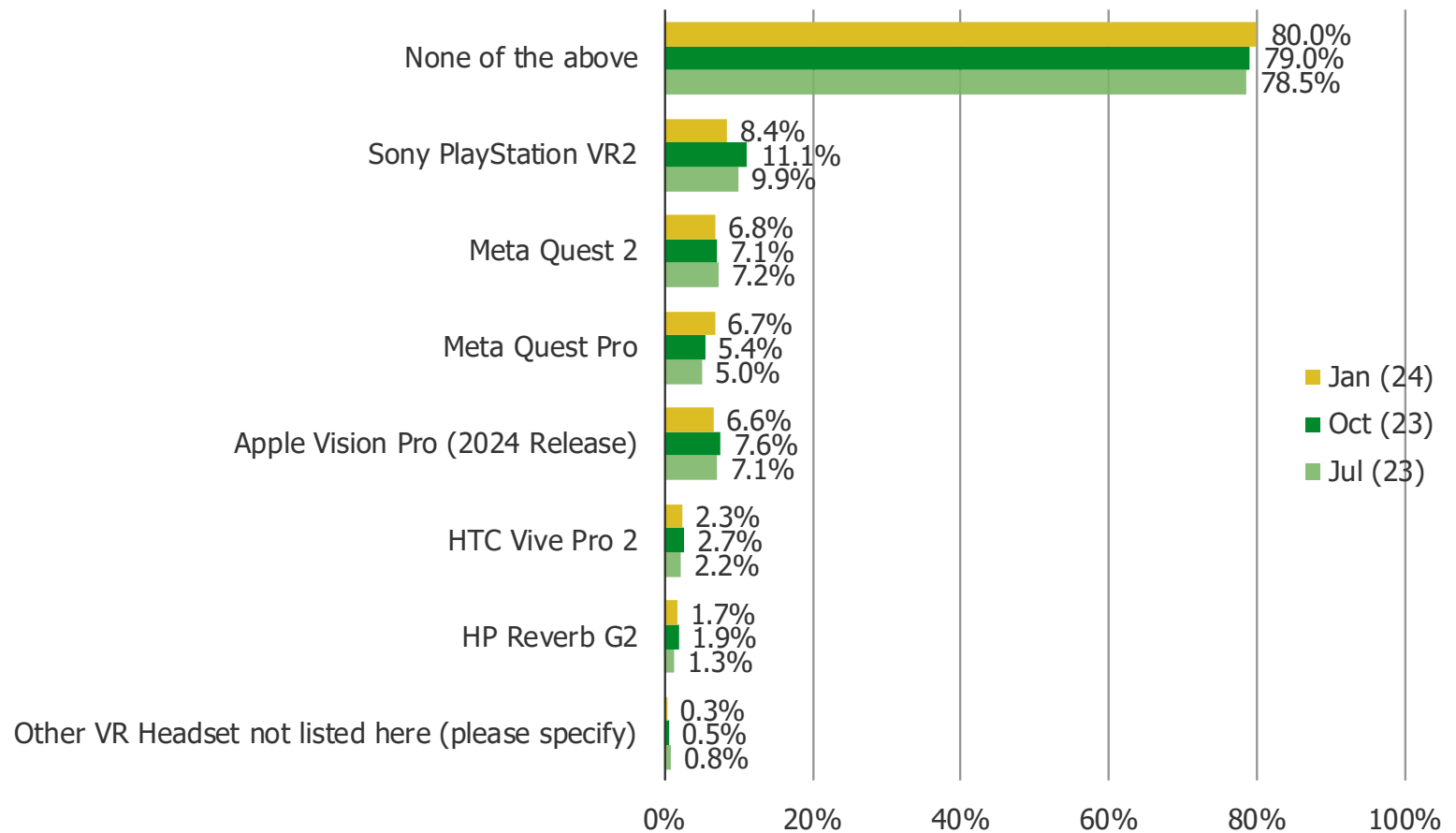


Cross-Tabbing The Above Data: OS they are currently using...



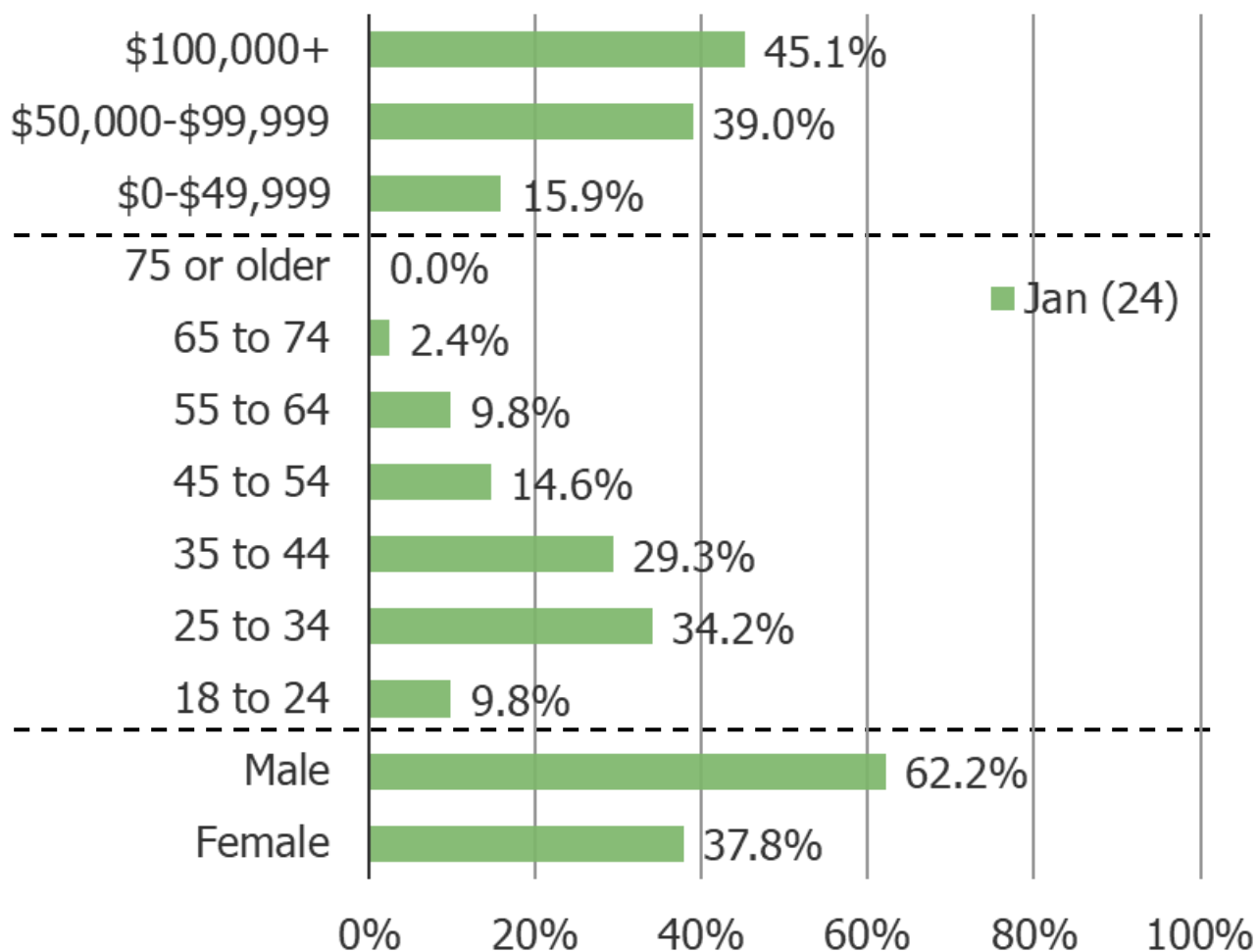
DO YOU HAVE ANY INTEREST IN THE FOLLOWING PRODUCTS? SELECT ALL THAT APPLY

This question was posed to all respondents.



DEMOGRAPHICS OF THOSE INTERESTED IN THE VISION PRO

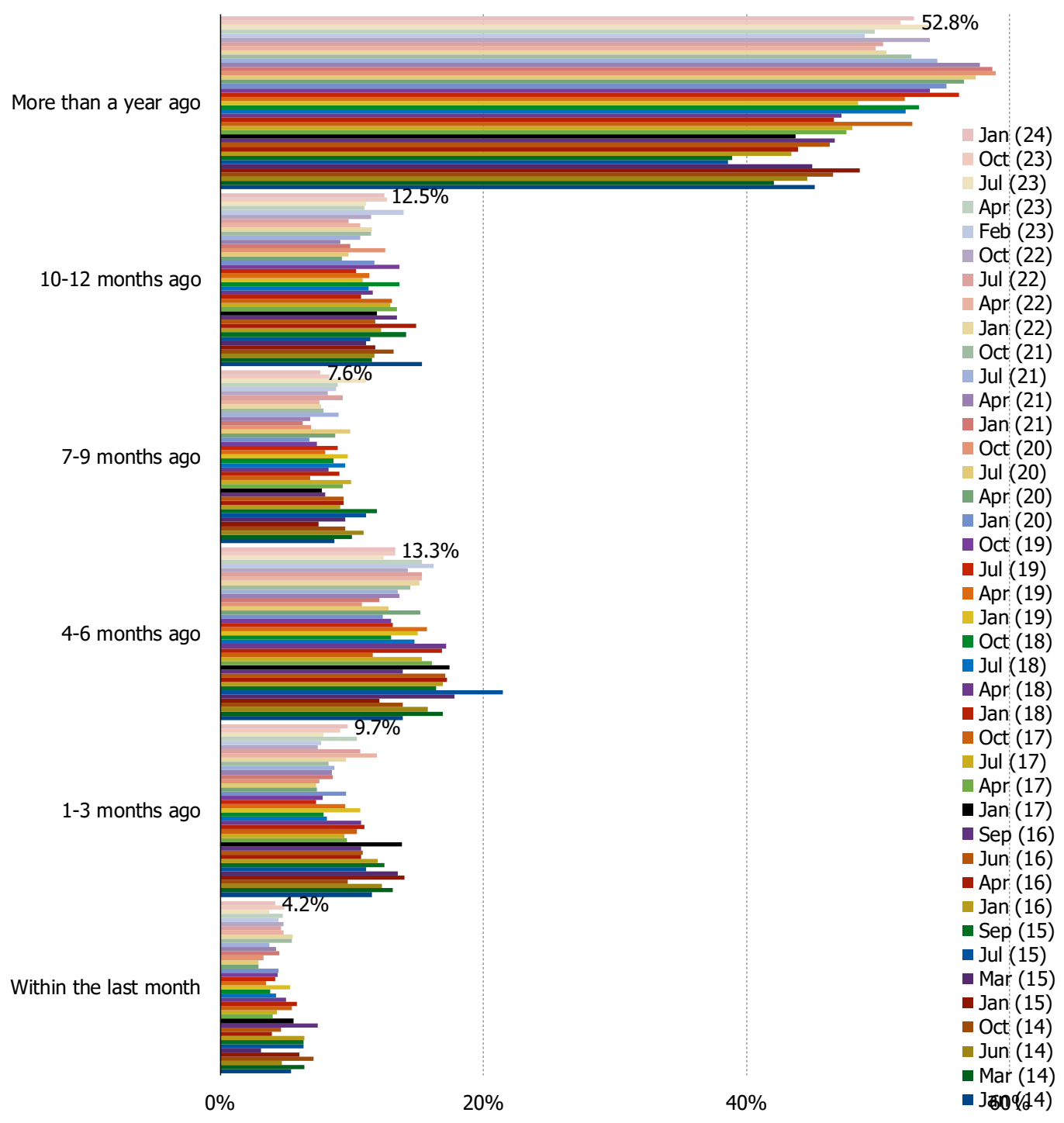
Cross-Tabbing respondents who said they are interested in the upcoming Apple Vision Pro product (N = 82)



SMARTPHONE REFRESH CYCLES

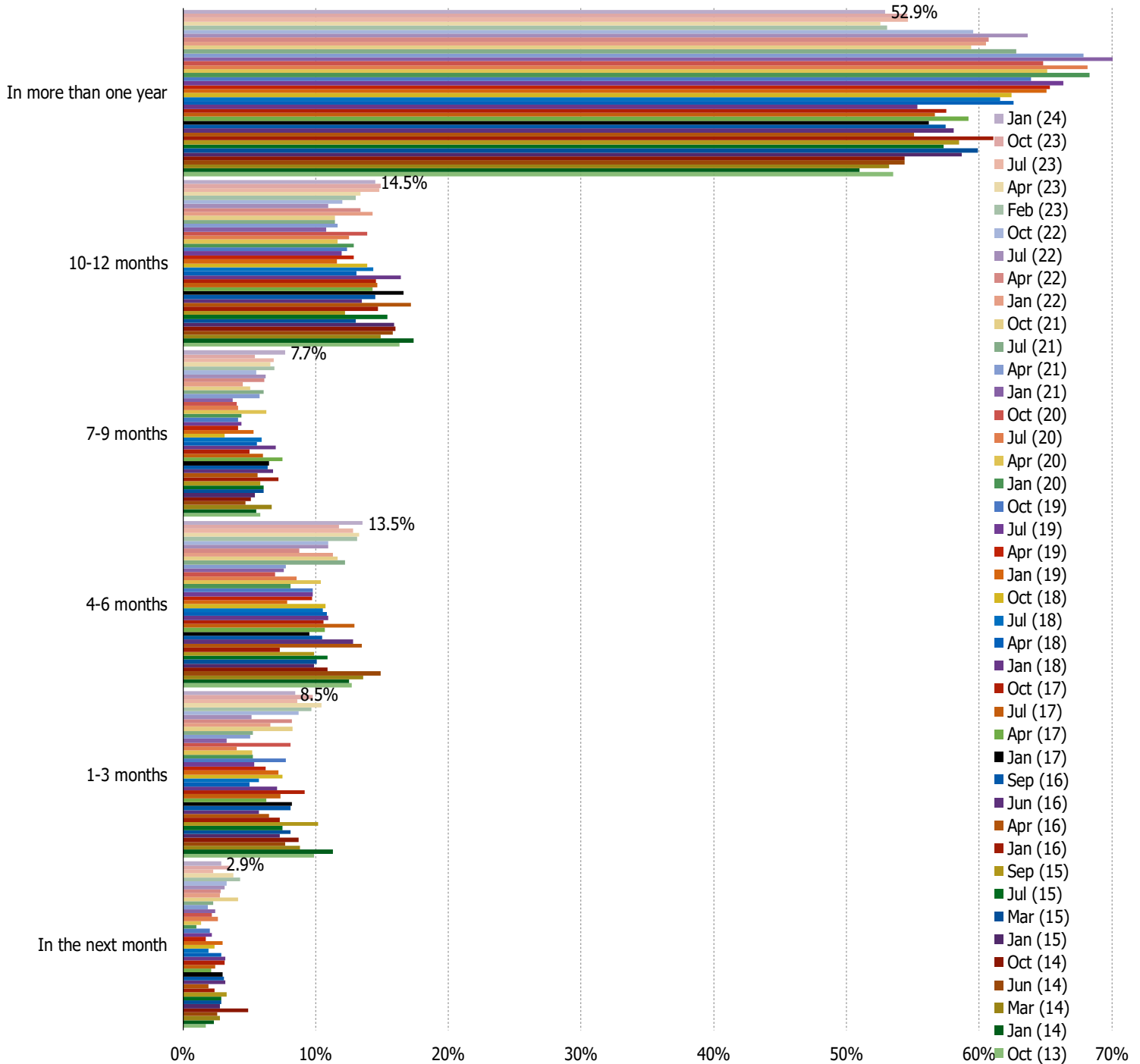
WHEN DID YOU GET YOUR CURRENT SMARTPHONE?

This question was posed to smartphone owners.



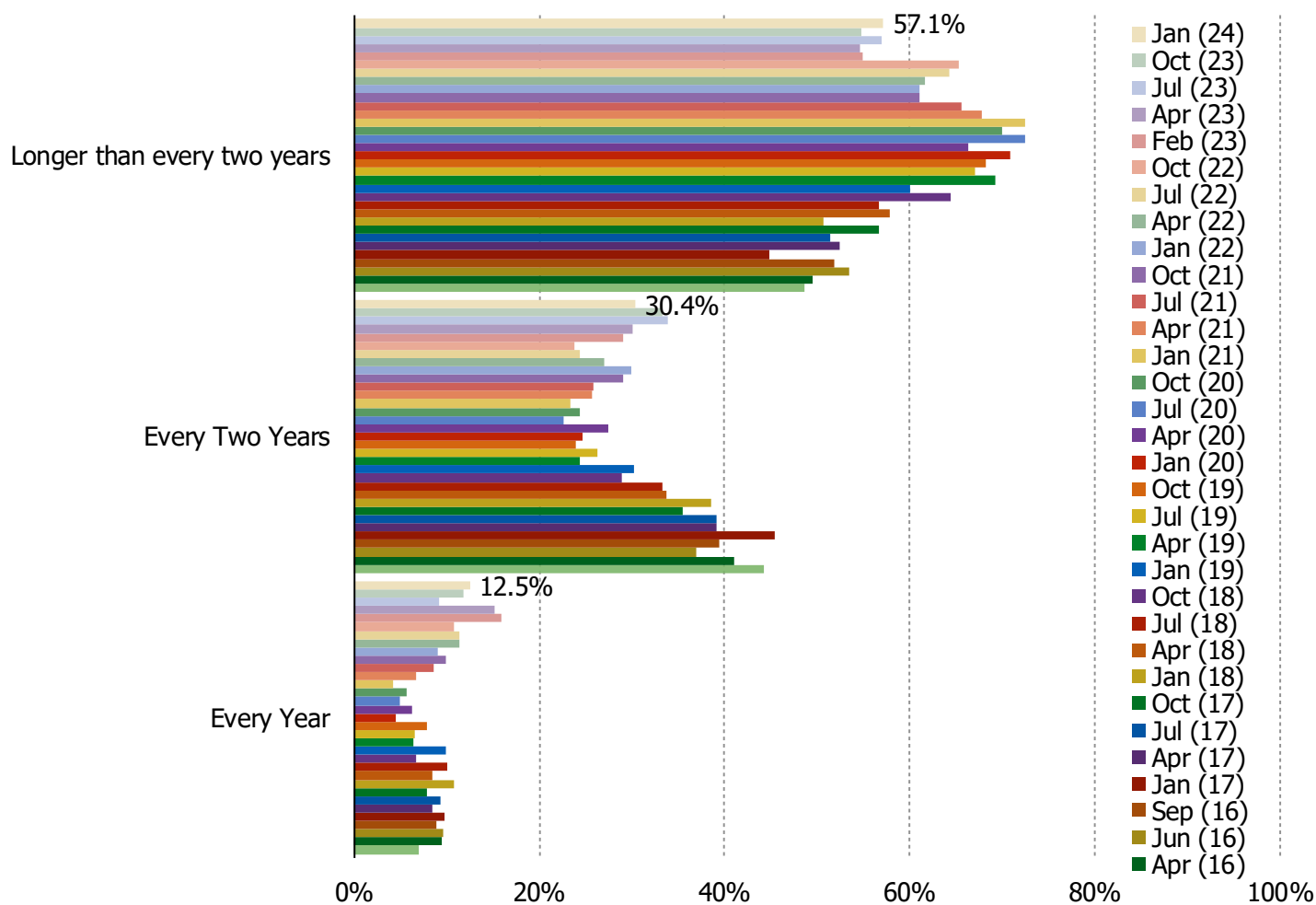
EXPECTED DATE OF NEXT SMARTPHONE PURCHASE

This question was posed to smartphone owners.



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

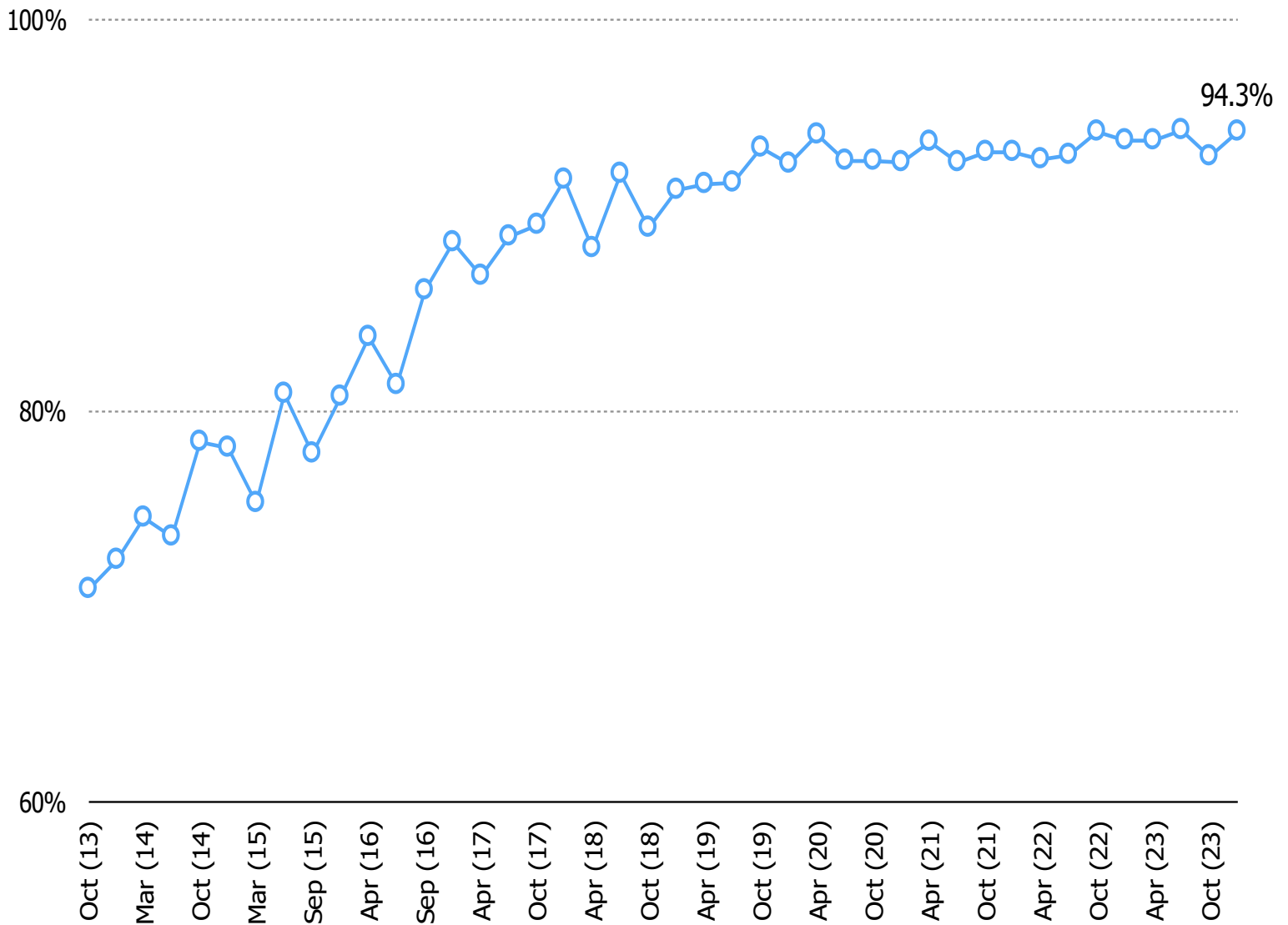
This question was posed to smartphone owners.



SMARTPHONE MARKET SHARE

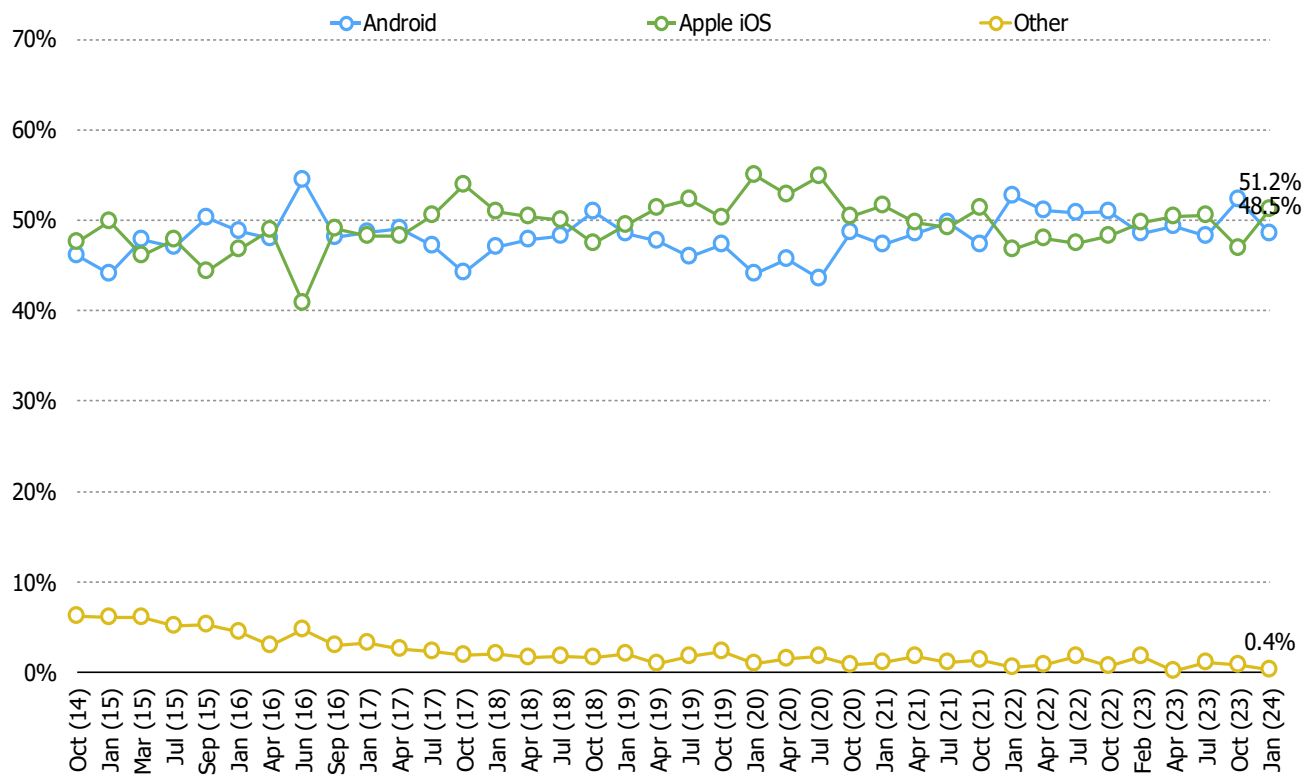
DO YOU OWN A SMARTPHONE?

This question was posed to all consumers.



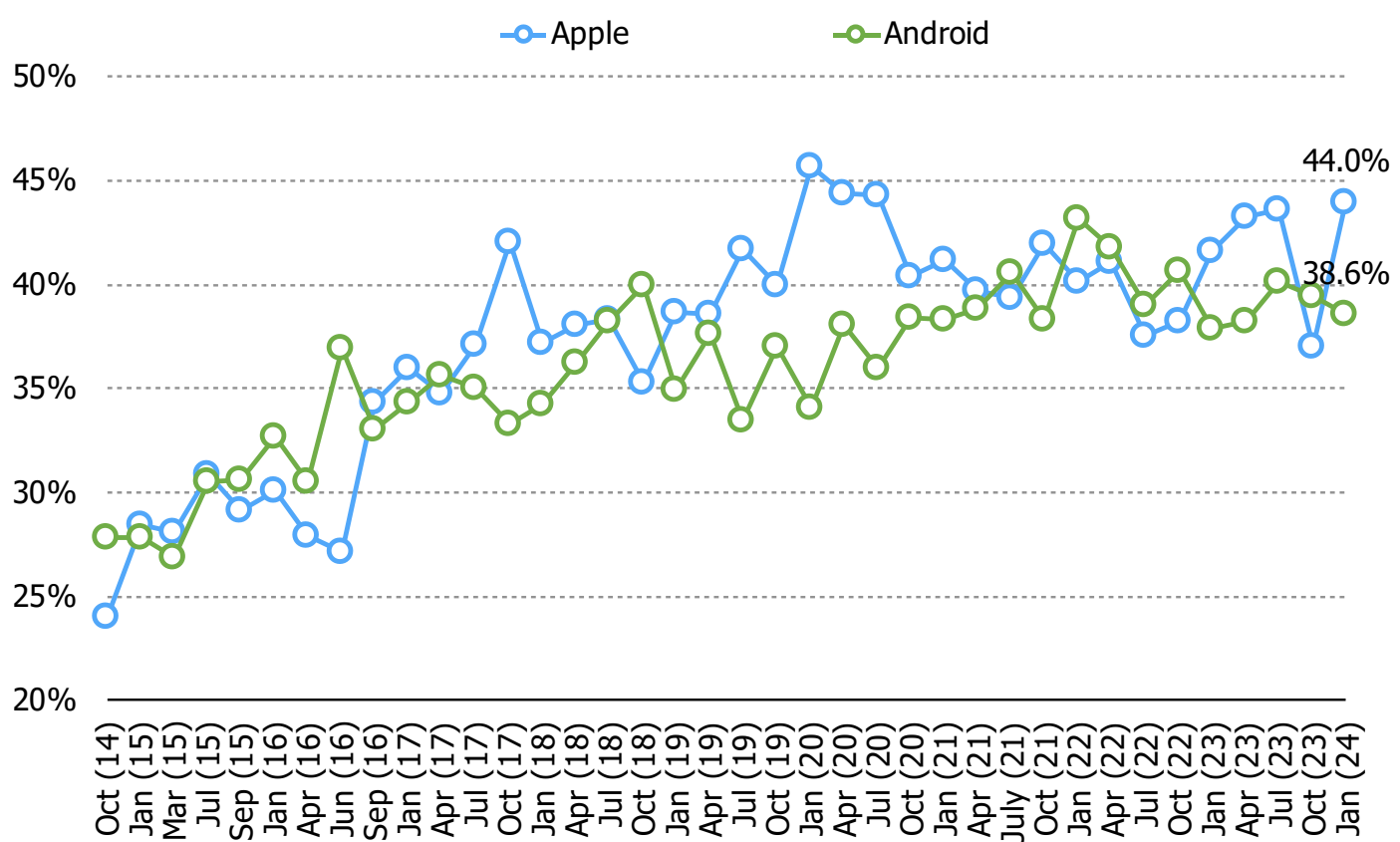
CURRENT OPERATING SYSTEM FOR SMARTPHONE

This question was posed to smartphone owners.



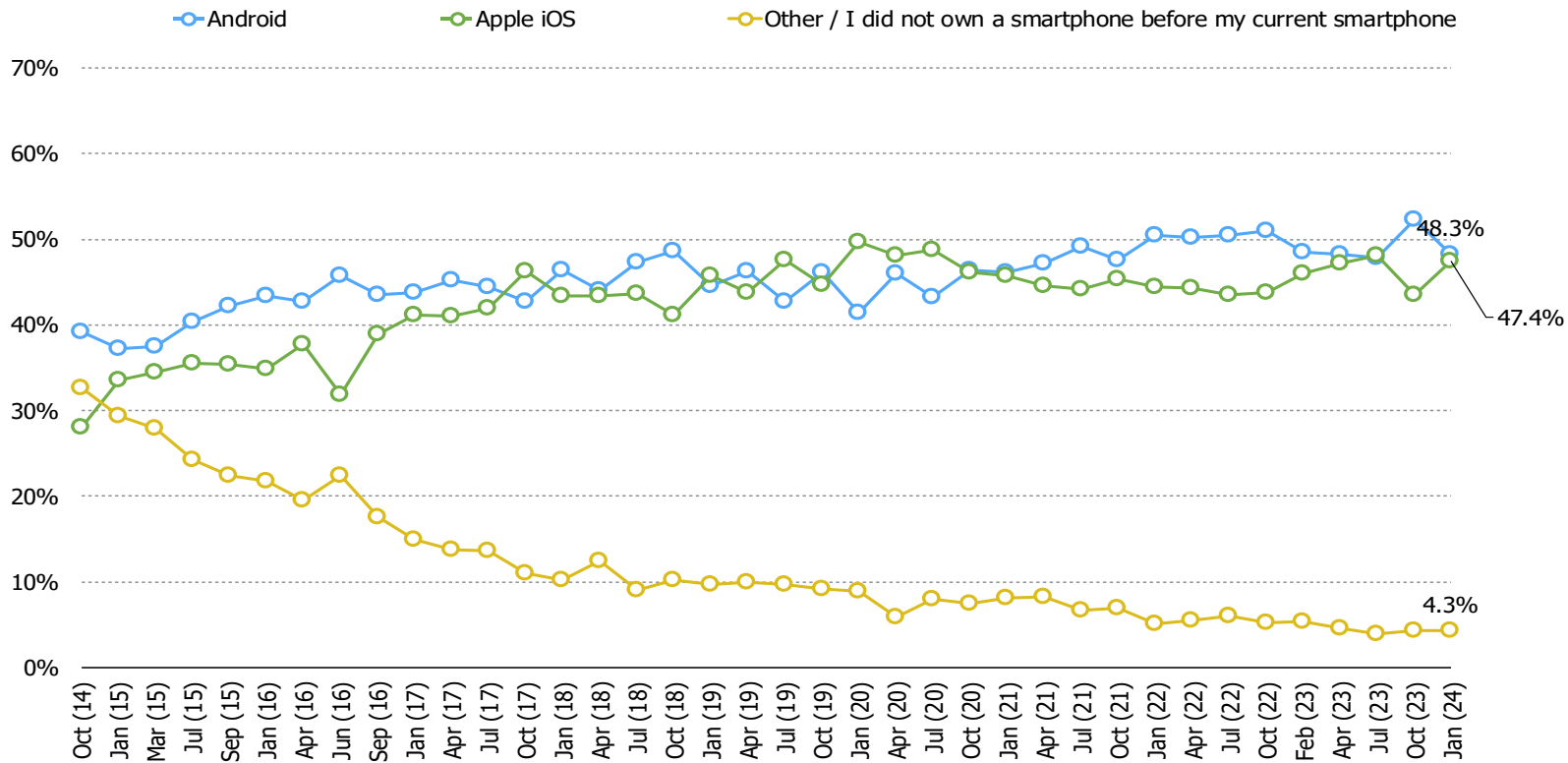
“TRIPLE PLAYS” – PERCENTAGE OF SMARTPHONE OWNERS WHO OWN THE SAME OPERATING SYSTEM FOR LAST PHONE, CURRENT PHONE, AND PLAN TO USE SAME FOR NEXT PHONE

This question was posed to smartphone owners.



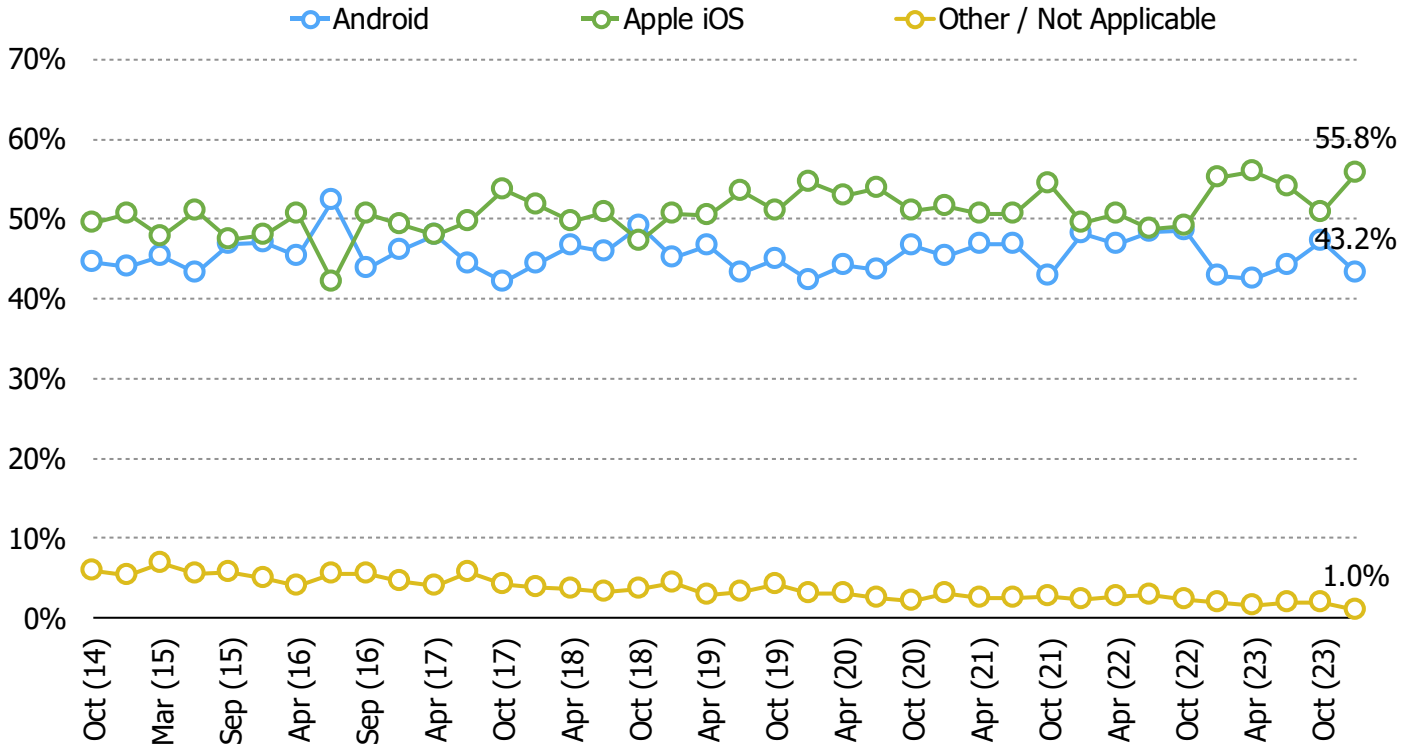
OPERATING SYSTEM FOR SMARTPHONE BEFORE CURRENT SMARTPHONE

This question was posed to smartphone owners.



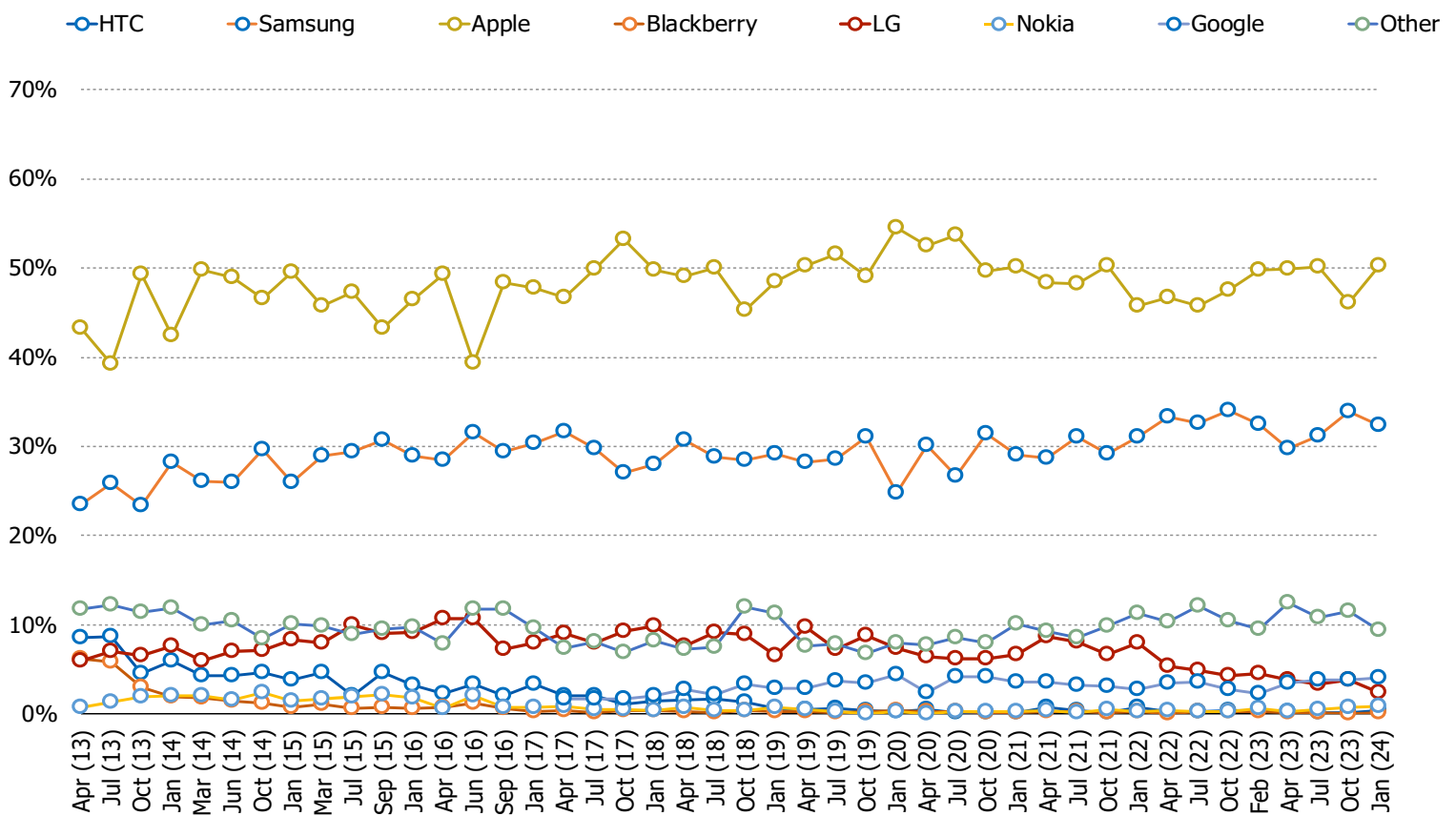
OPERATING SYSTEM FOR NEXT SMARTPHONE

This question was posed to smartphone owners.



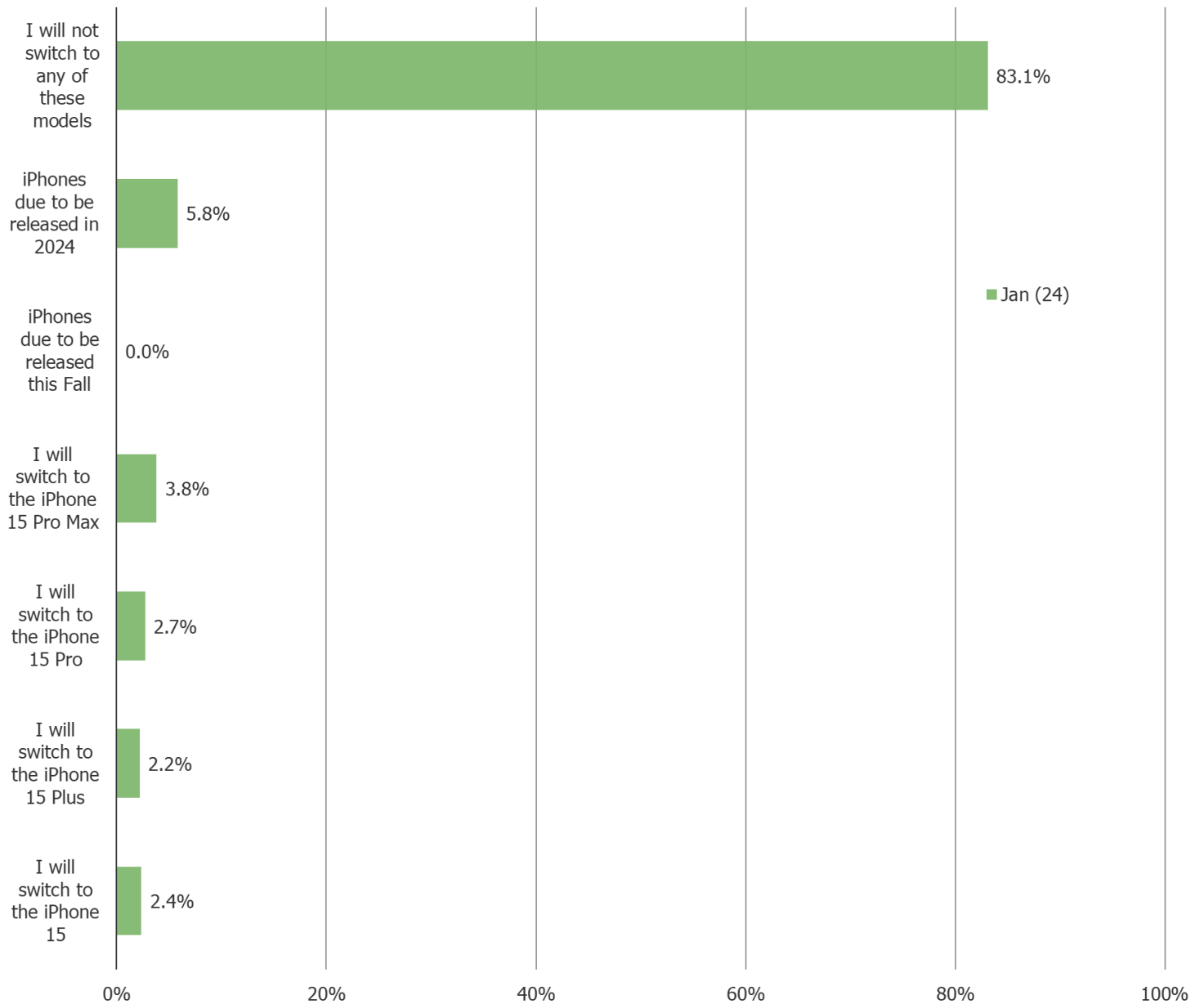
MARKET SHARE - SMARTPHONES

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?

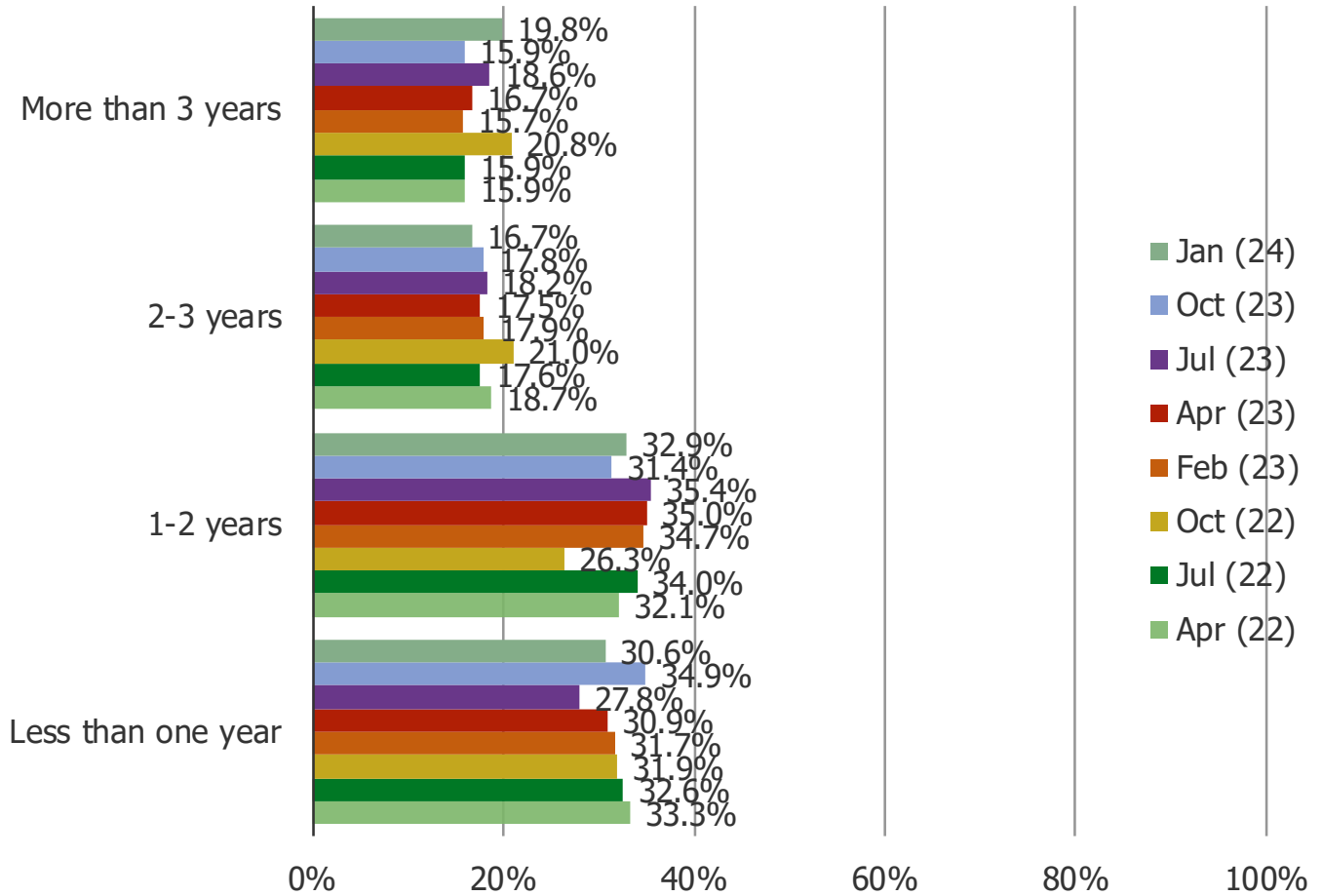
This question was posed to Android smartphone owners.



IPHONE PURCHASE PREFERENCES AND TESTING A LEASING MODEL

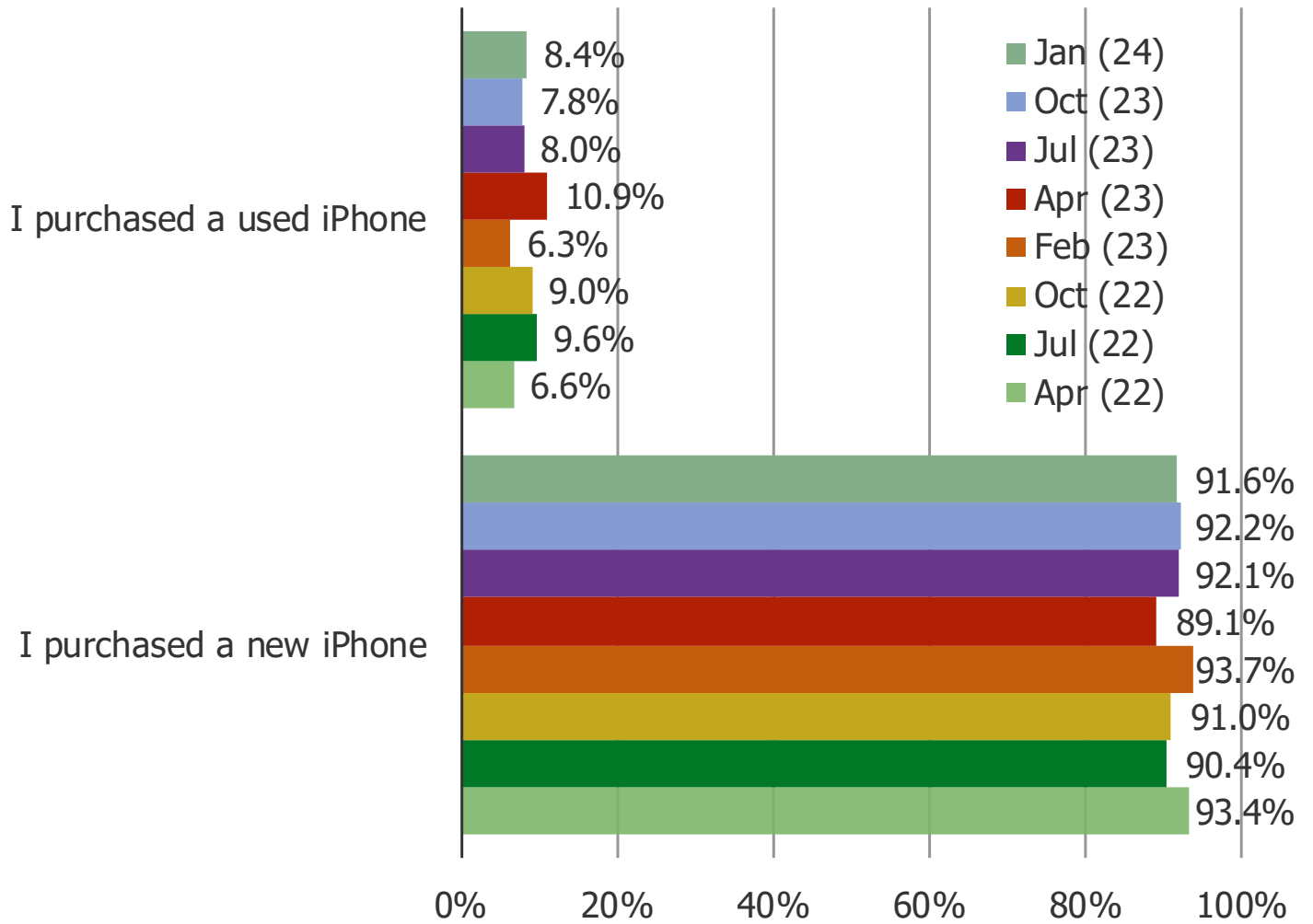
FOR HOW LONG HAVE YOU OWNED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



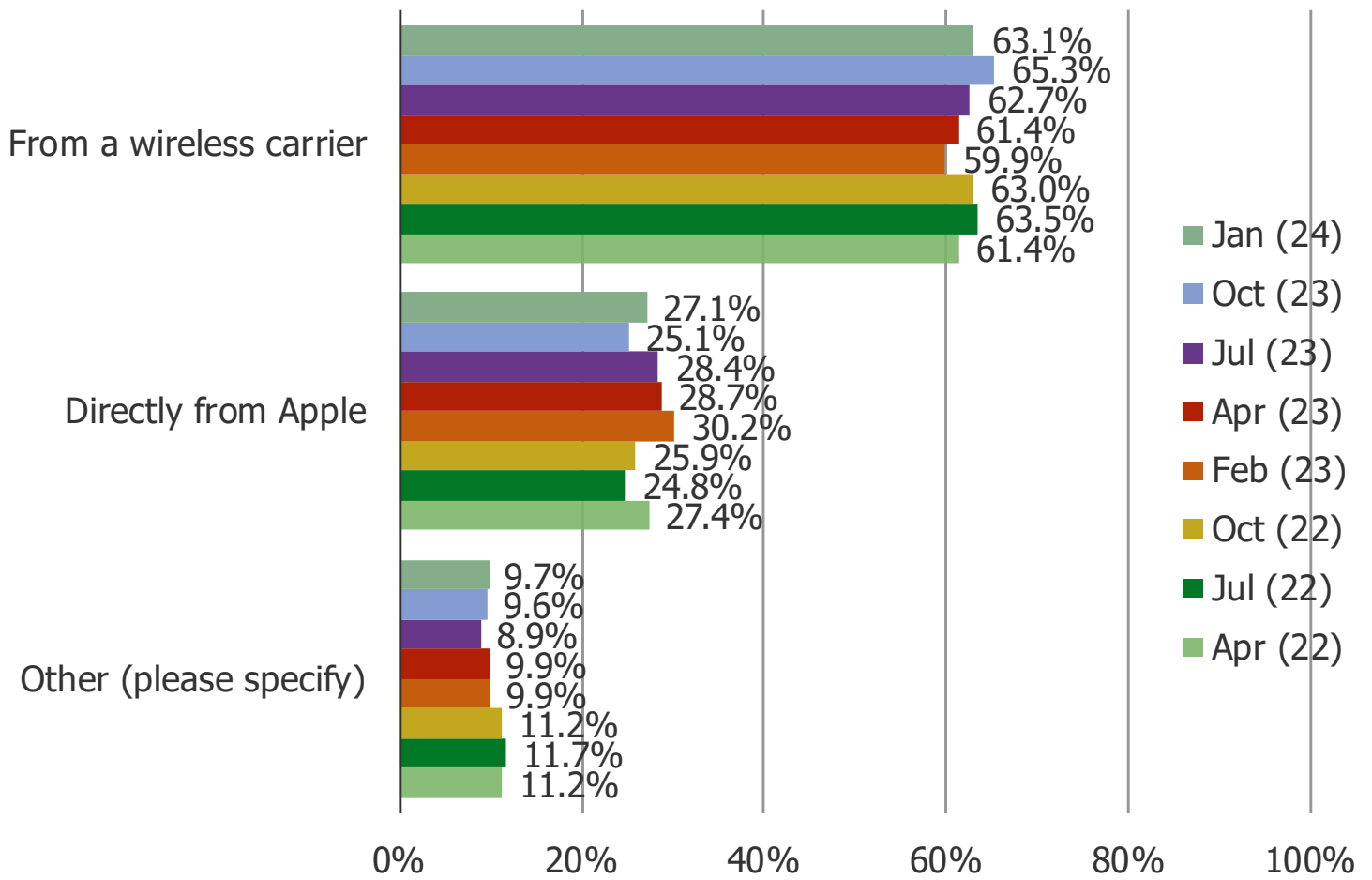
HOW DID YOU PURCHASE YOUR IPHONE?

This question was posed to iPhone owners.



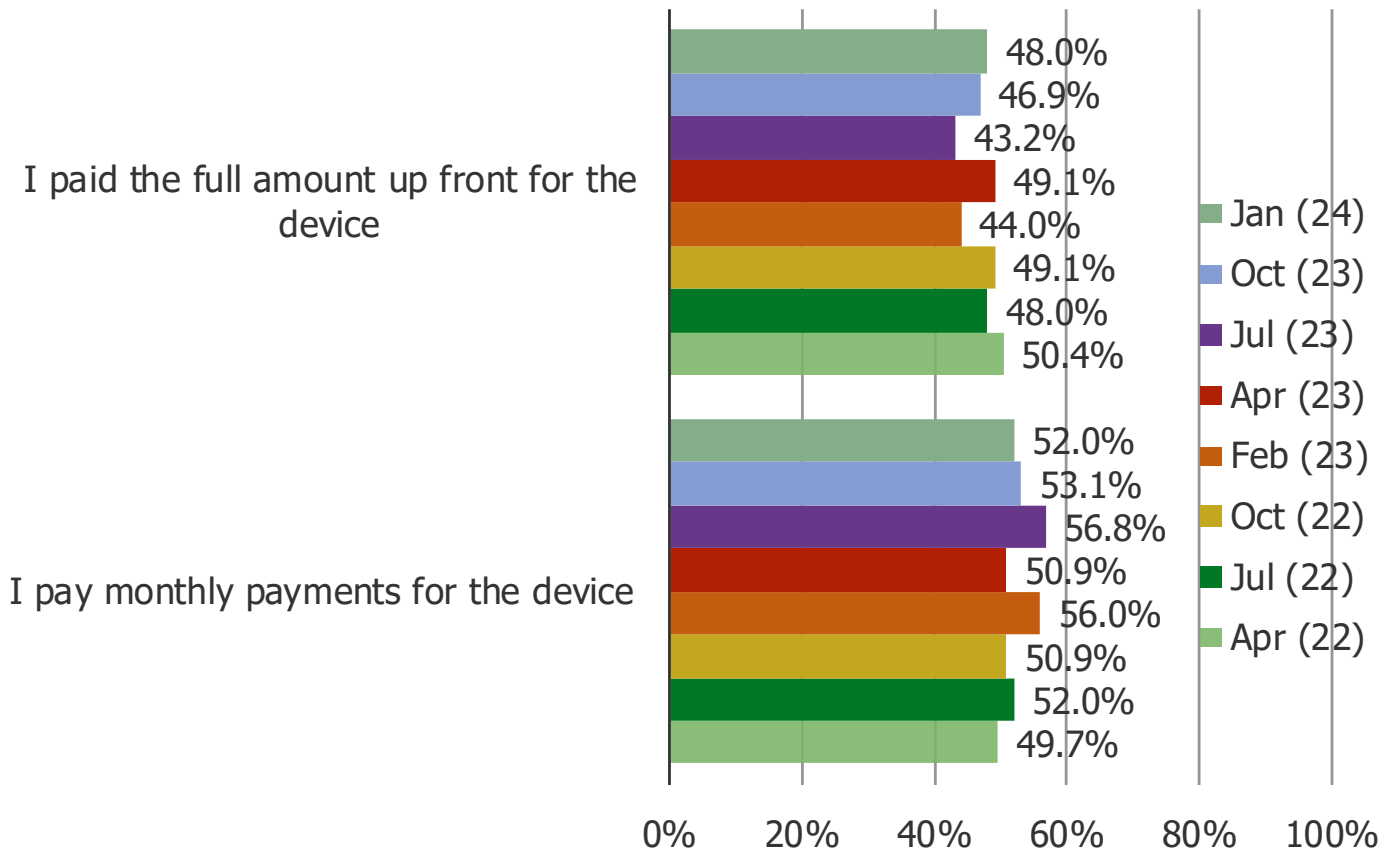
HOW DID YOU PURCHASE YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



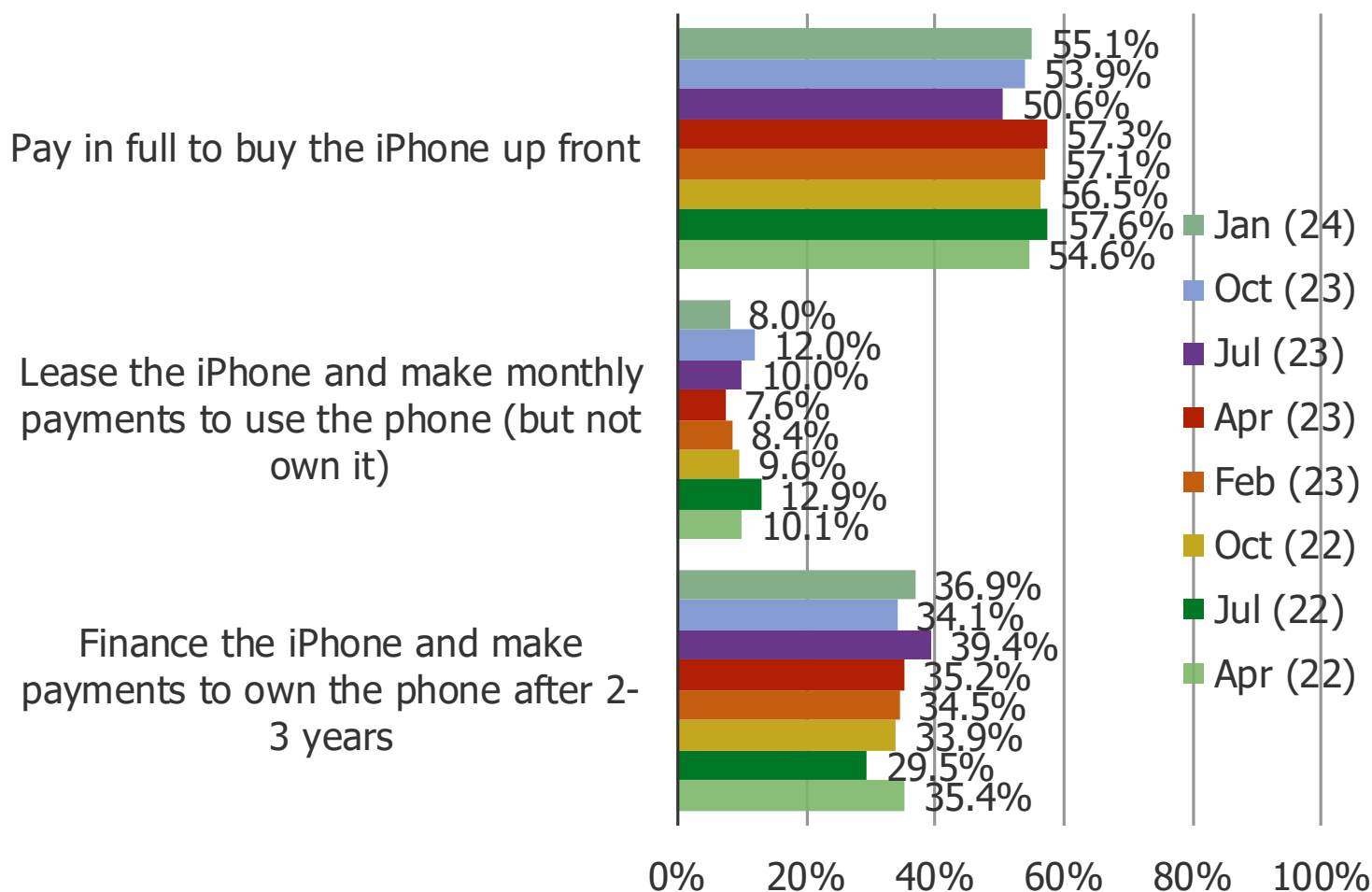
WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU PURCHASED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



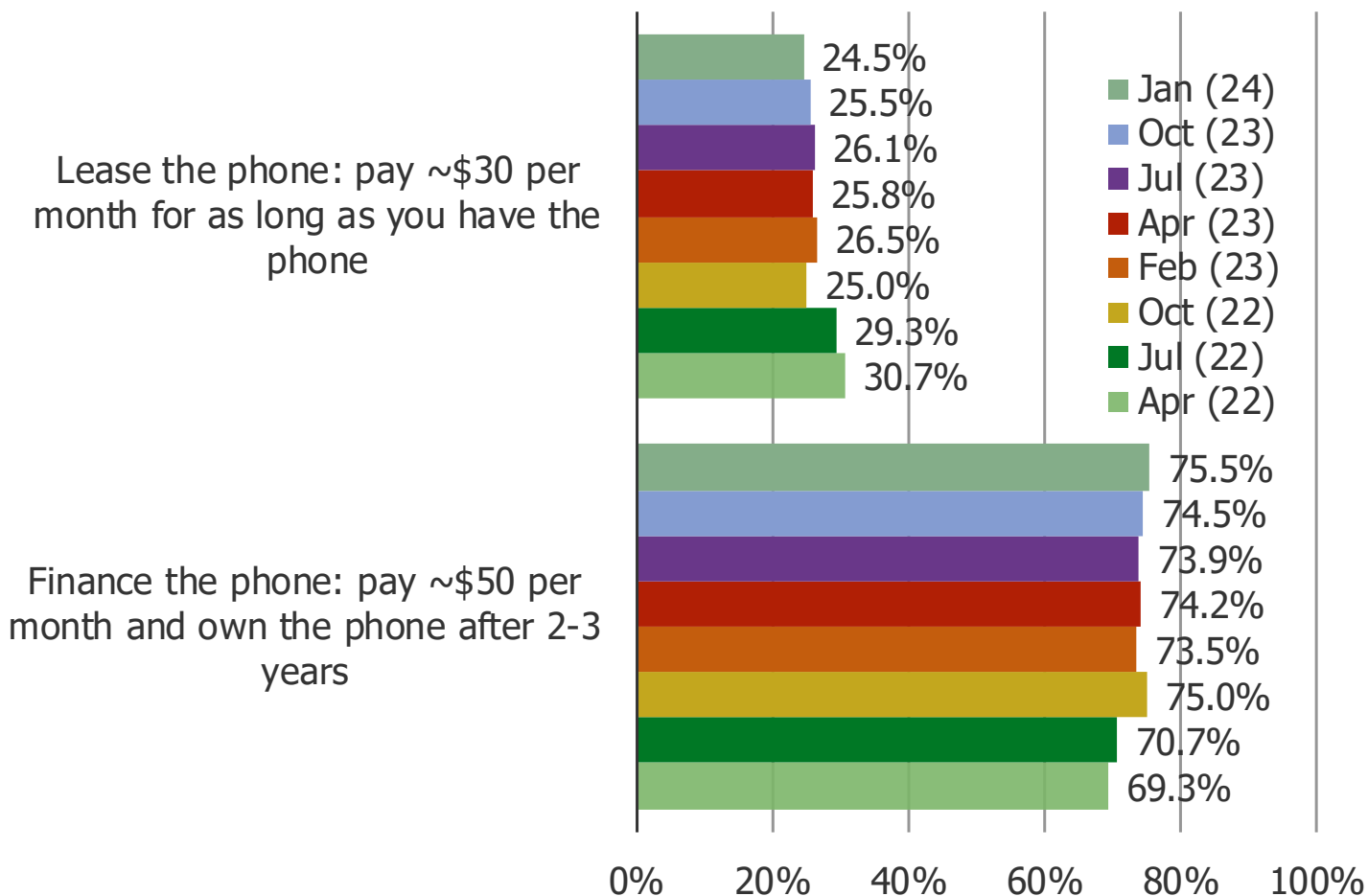
WHICH OF THE FOLLOWING DO YOU THINK WOULD BE A BETTER WAY TO HAVE AN IPHONE?

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.

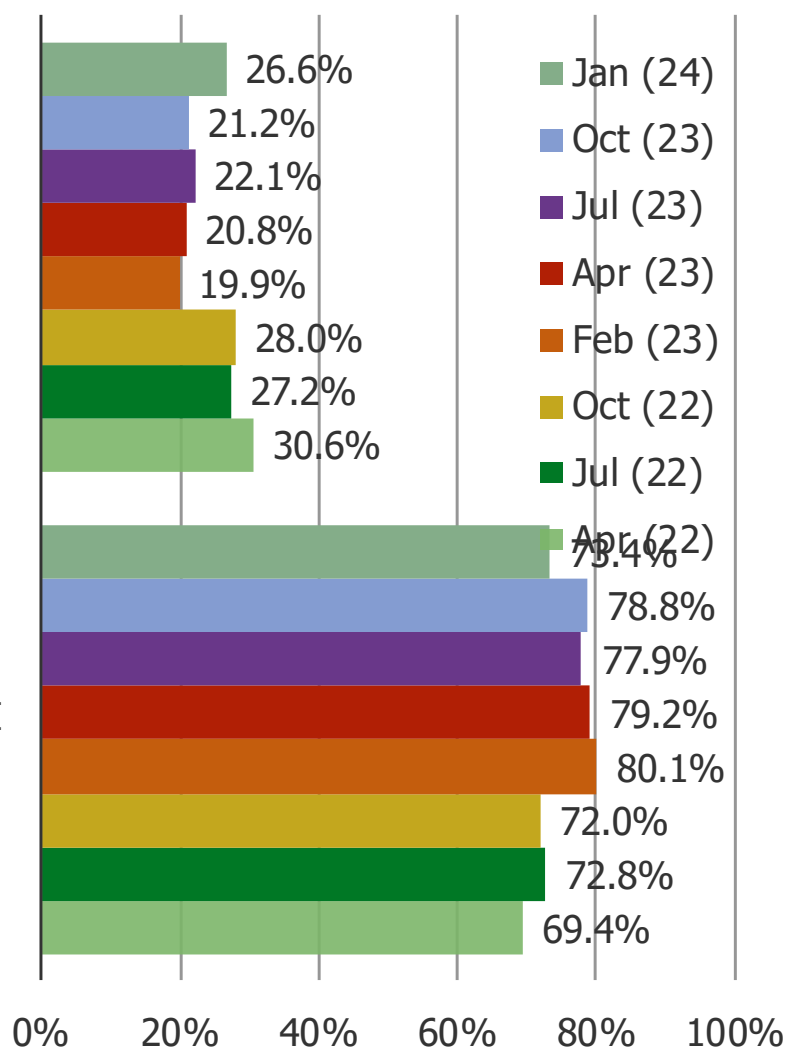


IMAGINE A NEW IPHONE COST ~\$50 PER MONTH TO FINANCE AND YOU WOULD OWN IT AFTER 2 YEARS. WHAT WOULD THE MONTHLY LEASE PRICE OF AN IPHONE HAVE TO BE FOR YOU TO DECIDE TO LEASE THE PHONE AND PAY THE MONTHLY PRICE FOR AS LONG AS YOU HAVE IT INSTEAD OF FINANCING IT TO OWN IT?

This question was posed to iPhone owners.

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

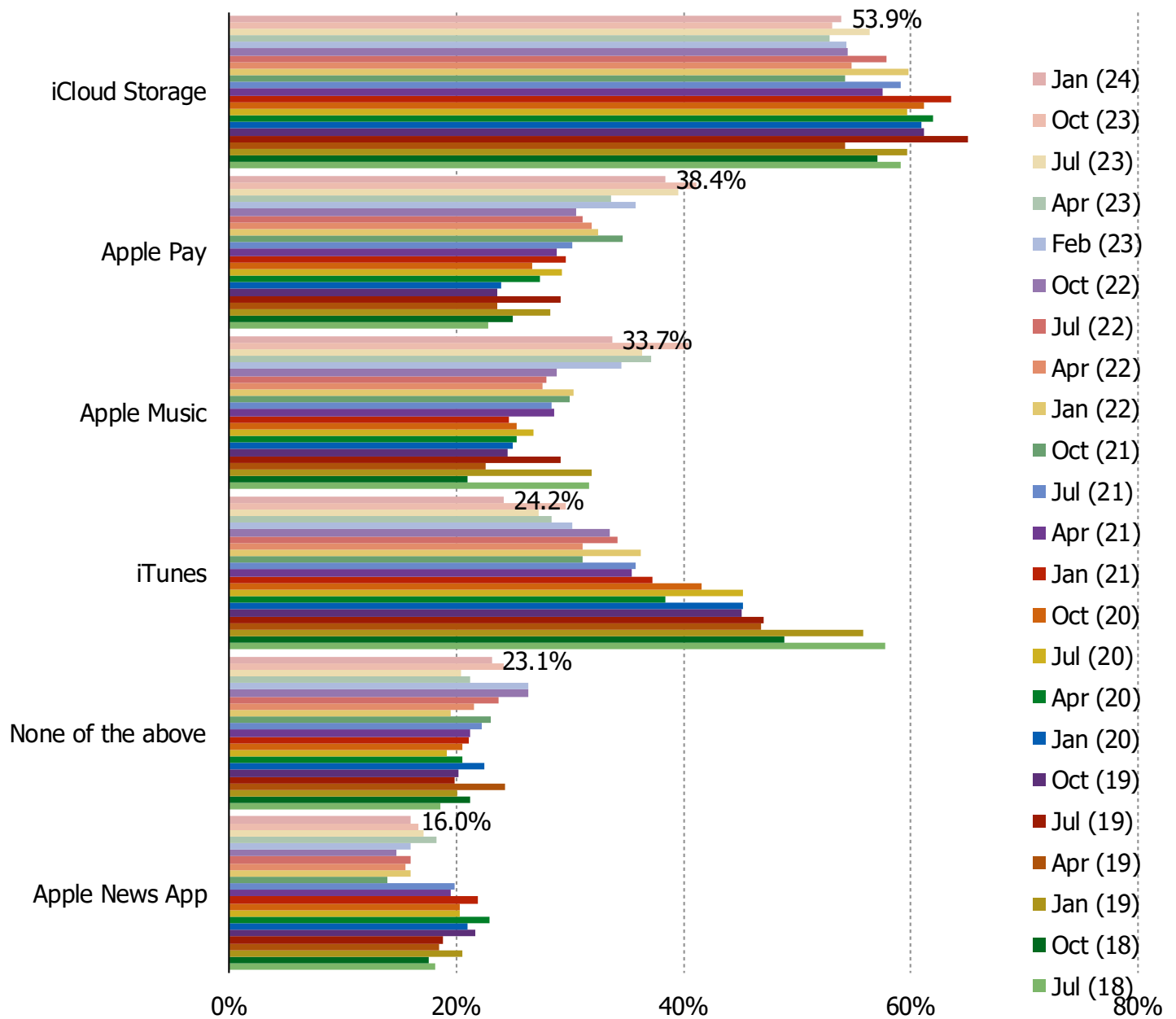
I would not lease it at any price, I would always prefer to finance



AAPL PAY QUESTIONS

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

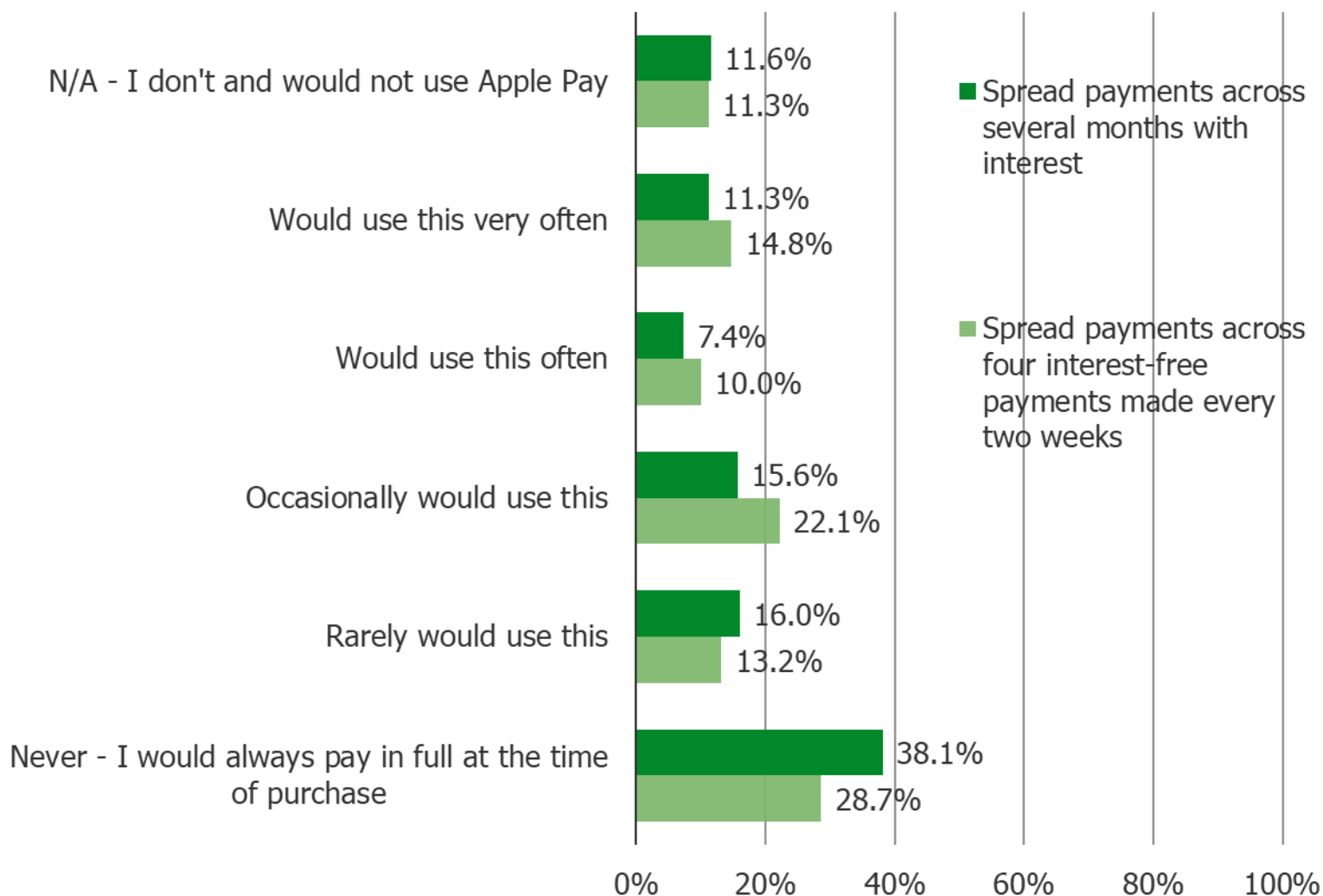
This question was posed to iPhone owners.



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?

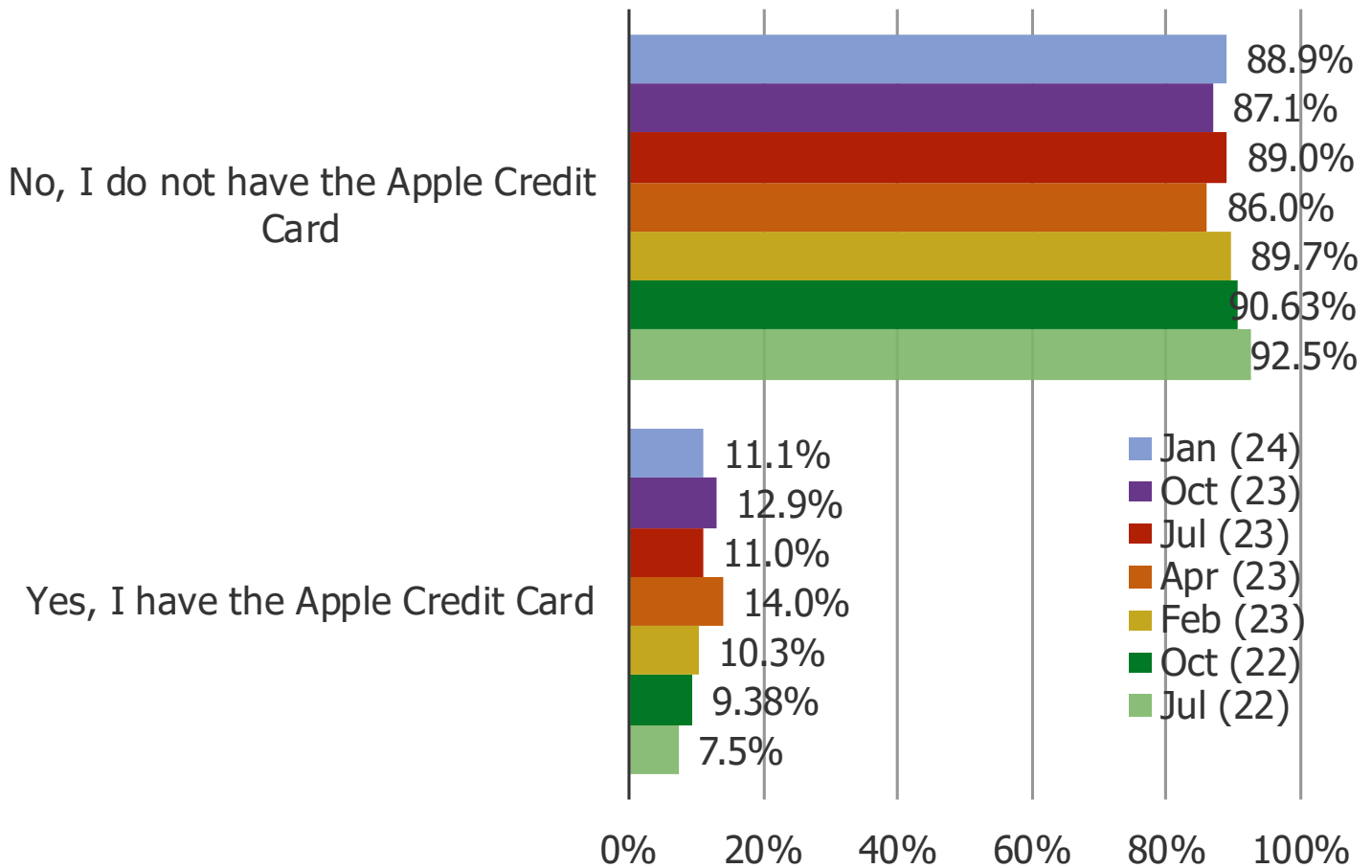
This question was posed to iPhone owners who use Apple Pay.

JANUARY 2024



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

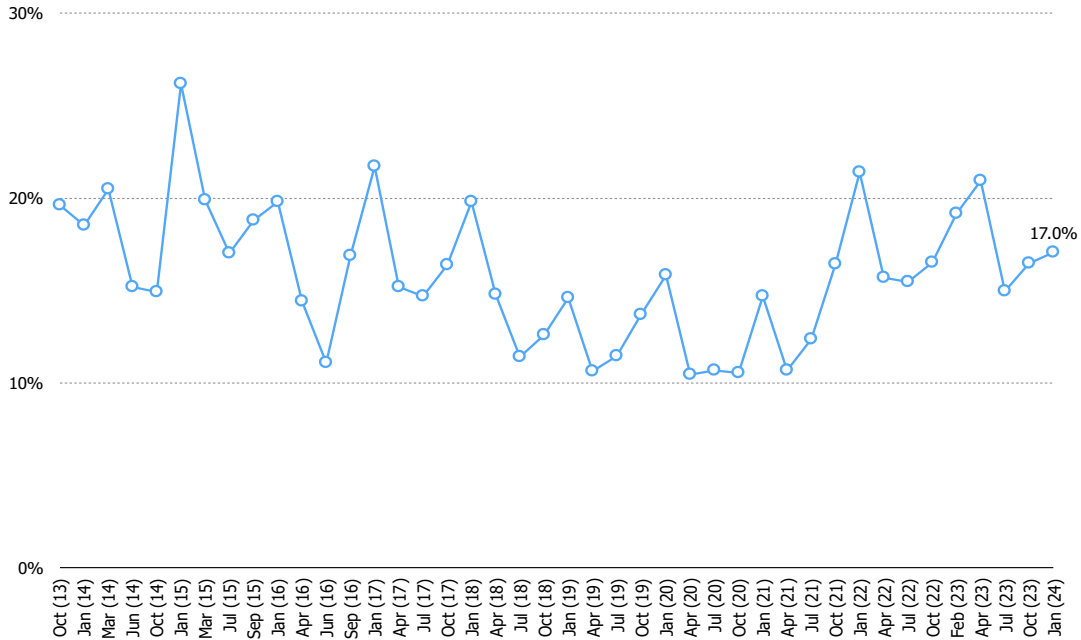
This question was posed to iPhone owners.



IPHONE DYNAMICS

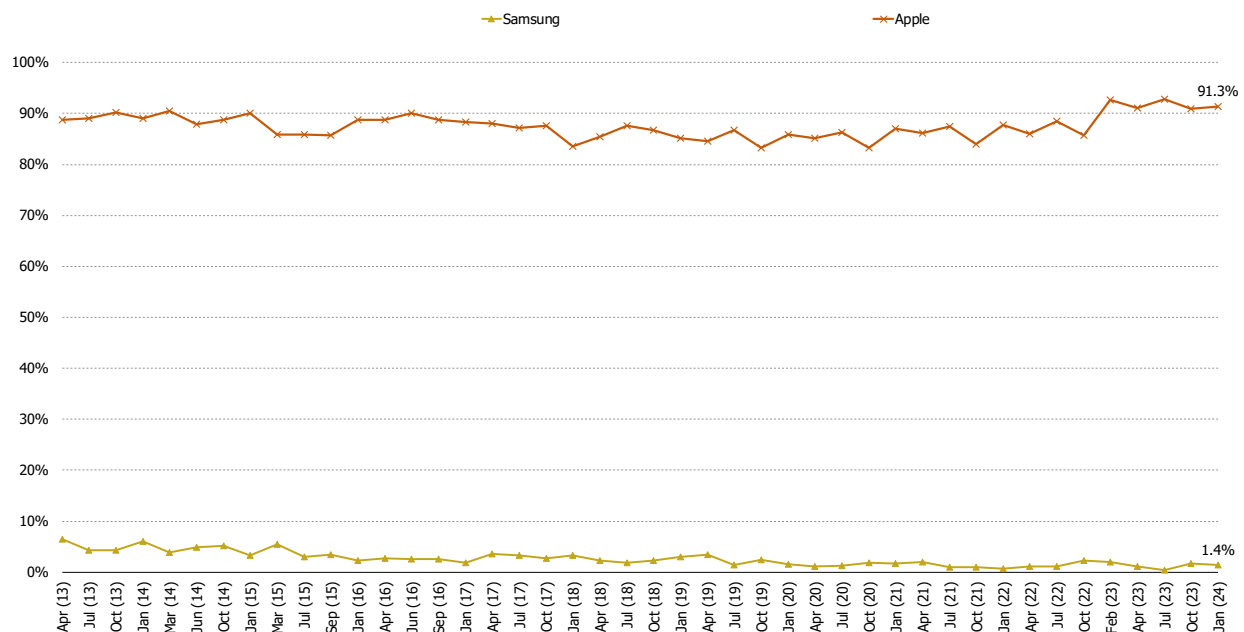
GOT IPHONE WITHIN PAST THREE MONTHS

This question was posed to iPhone owners.

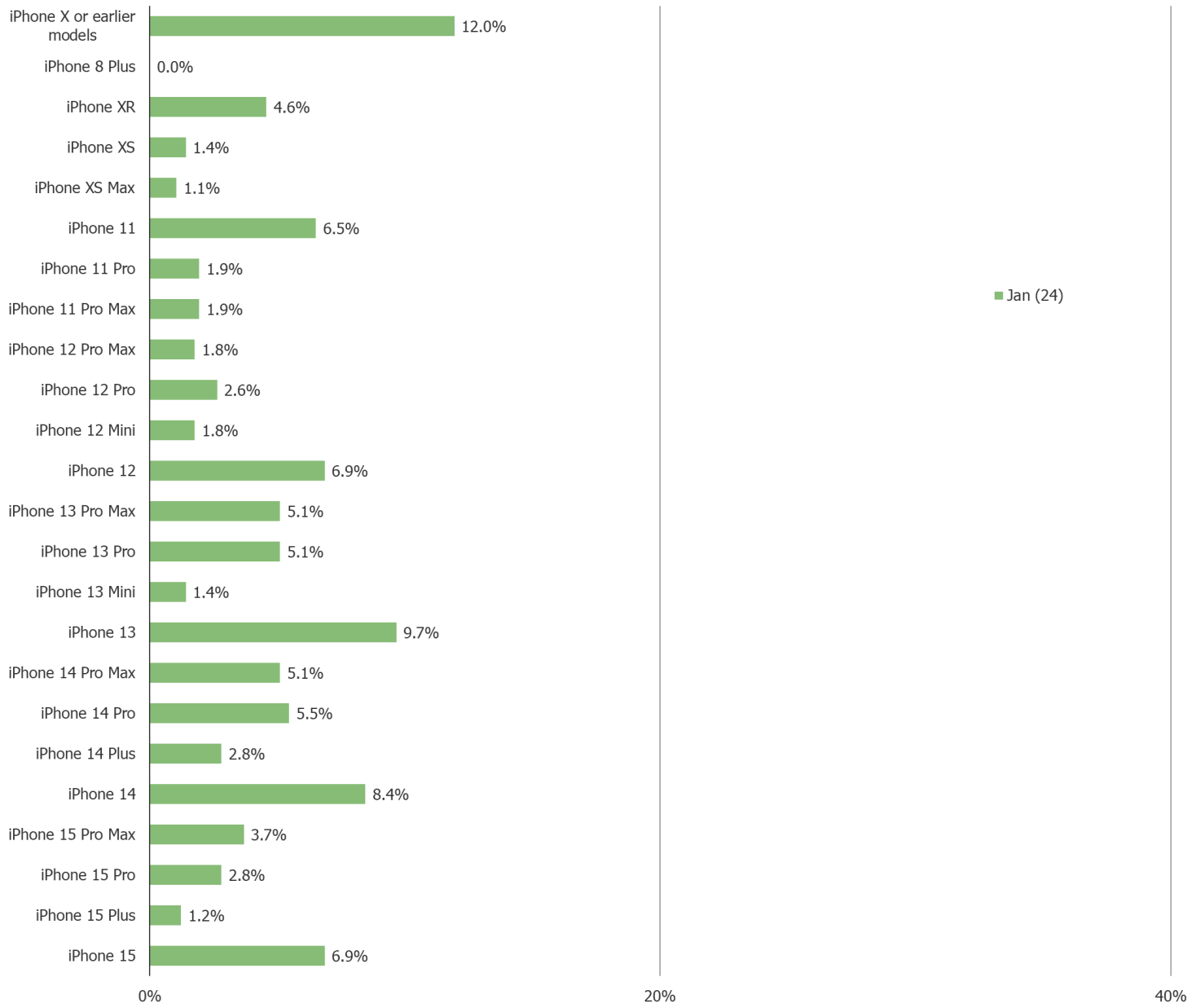


WHICH SMARTPHONE DO YOU PLAN TO GET NEXT?

This question was posed to iPhone owners.

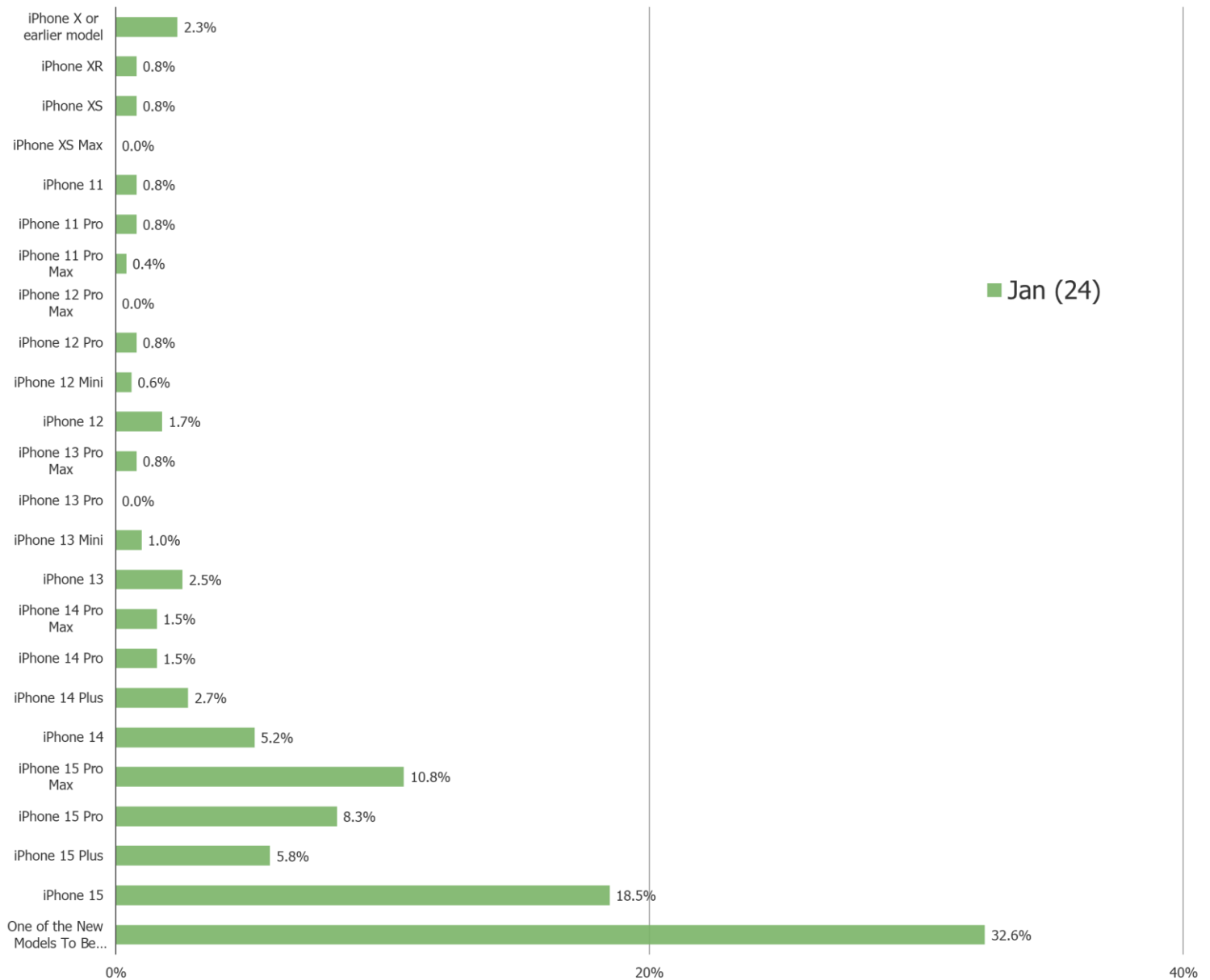


IPHONE MIX – WHICH MODEL DO YOU CURRENTLY OWN?



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?

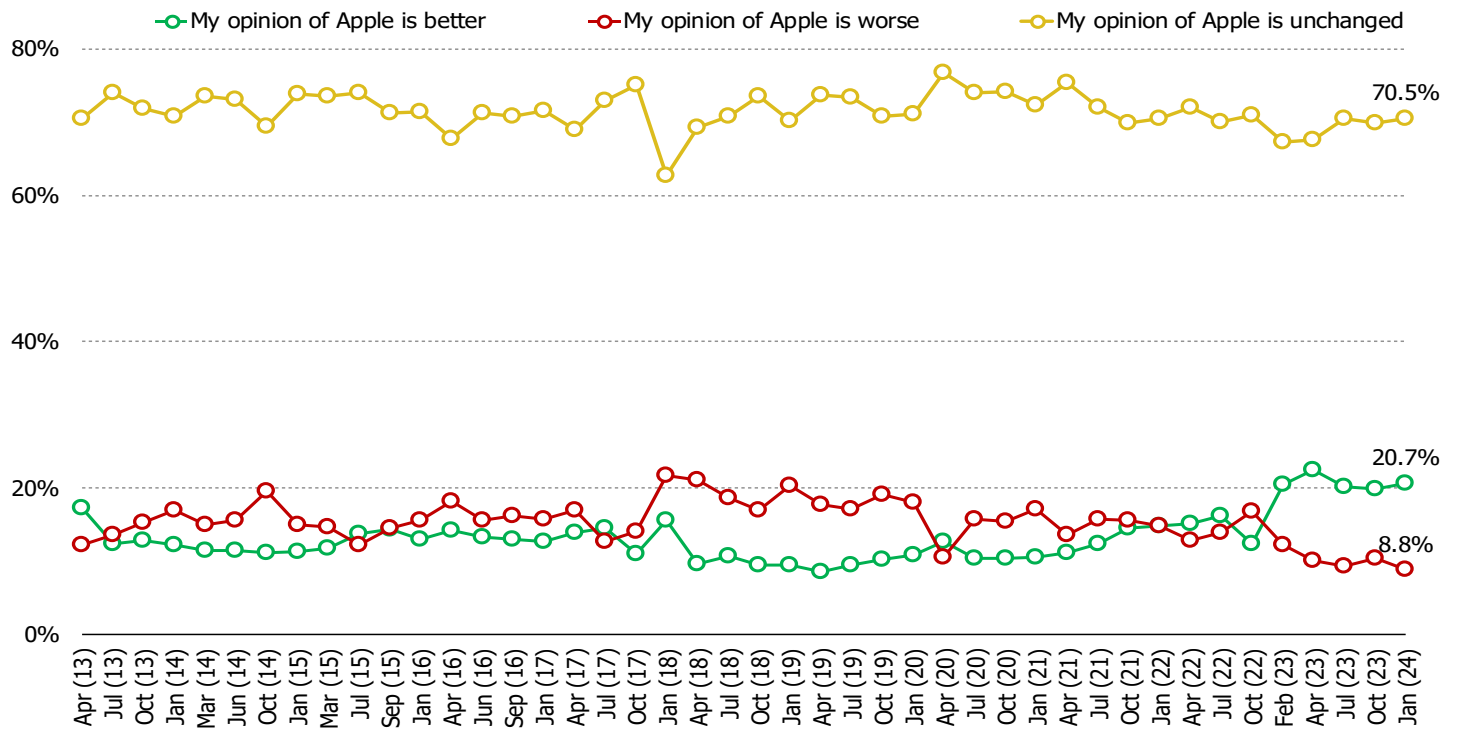
This question was posed to smartphone owners.



CONSUMER SENTIMENT

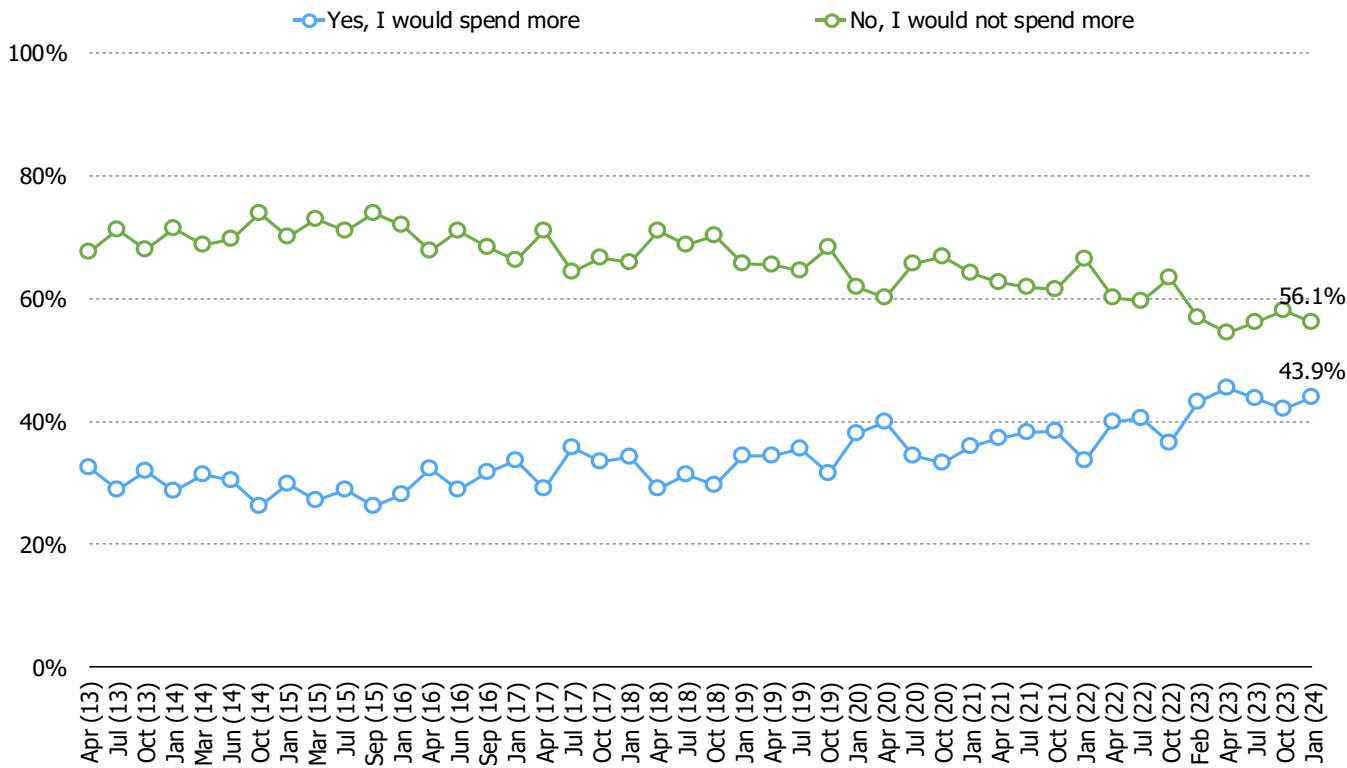
HAS YOUR OPINION OF APPLE CHANGED OVER THE PAST YEAR?

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?

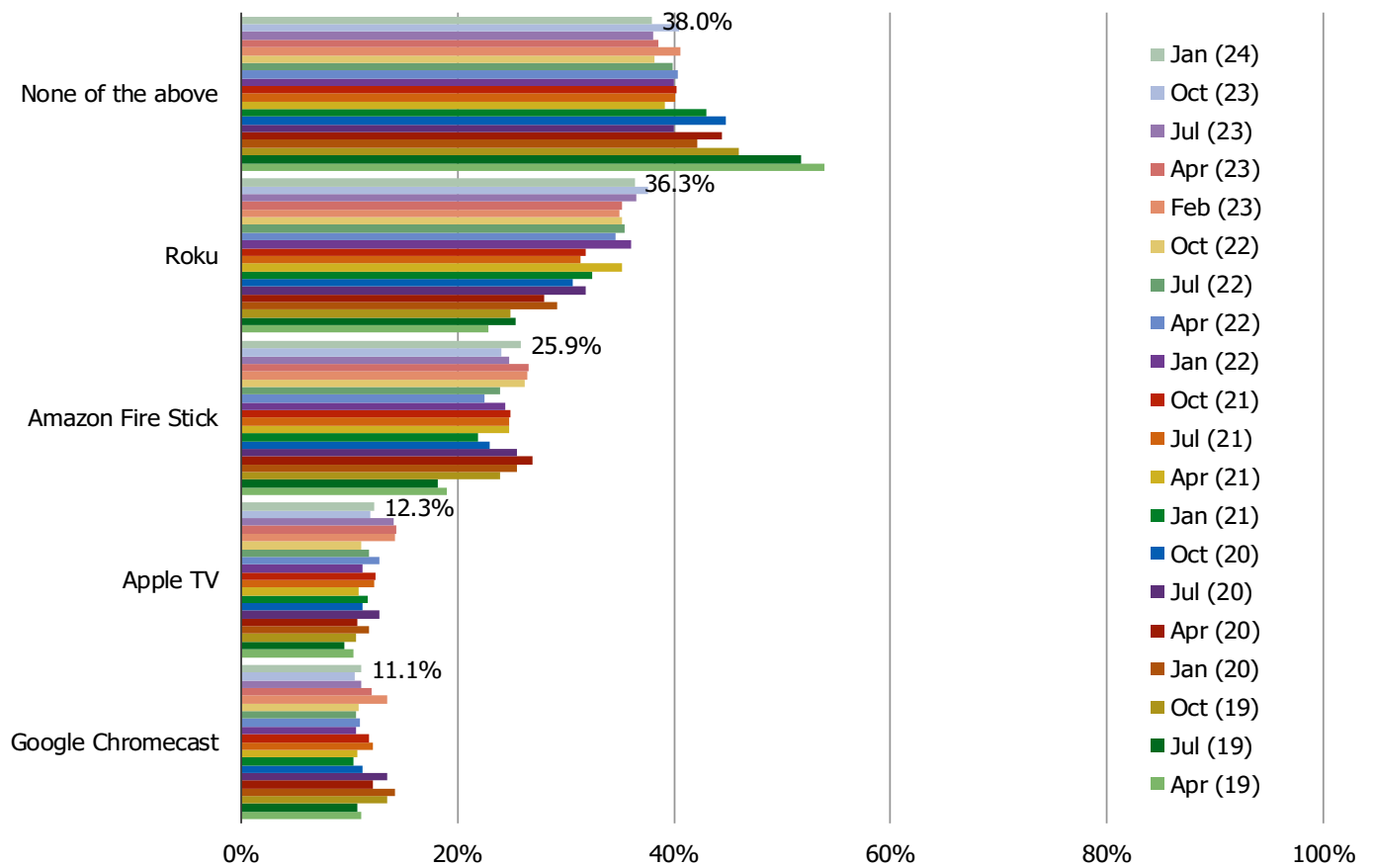
This question was posed to all respondents



STREAMING PLAYERS

DO YOU OWN ANY OF THE FOLLOWING STREAMING PLAYERS?

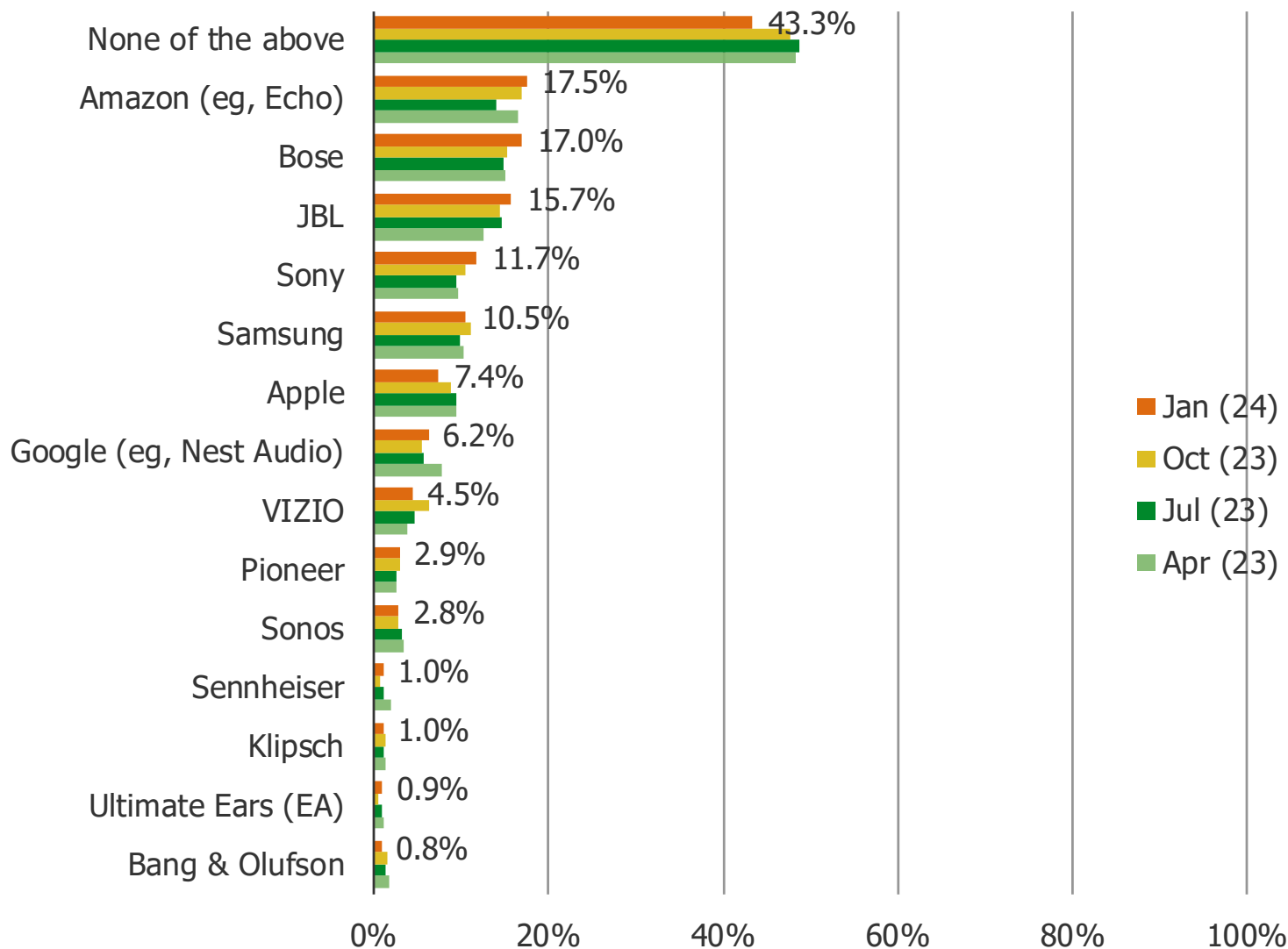
This question was posed to all consumers.



SPEAKERS AND SOUNDBARS

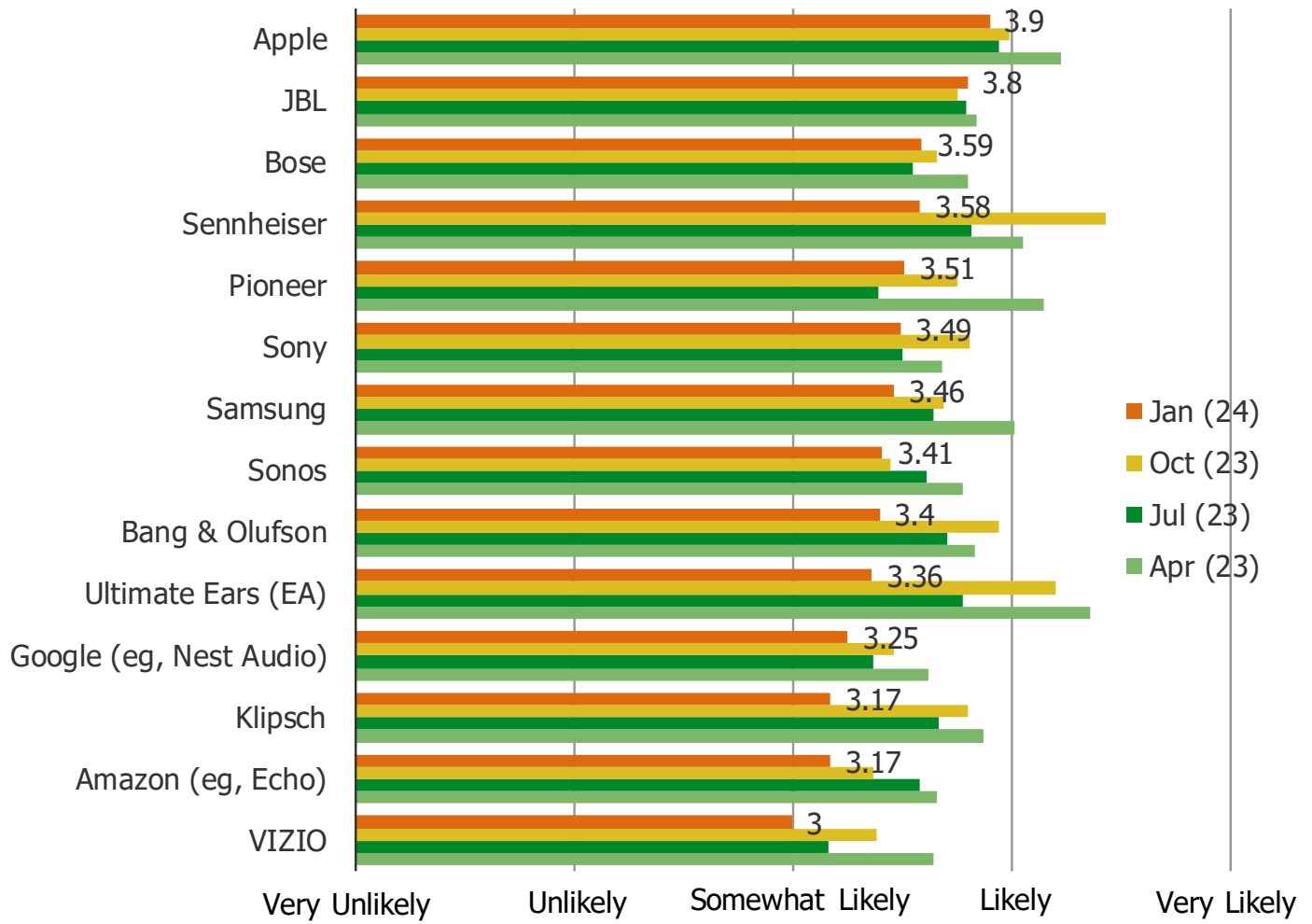
DO YOU OWN ONE OR MORE SPEAKERS FROM THE FOLLOWING BRANDS? SELECT ALL THAT APPLY

This question was posed to all respondents.



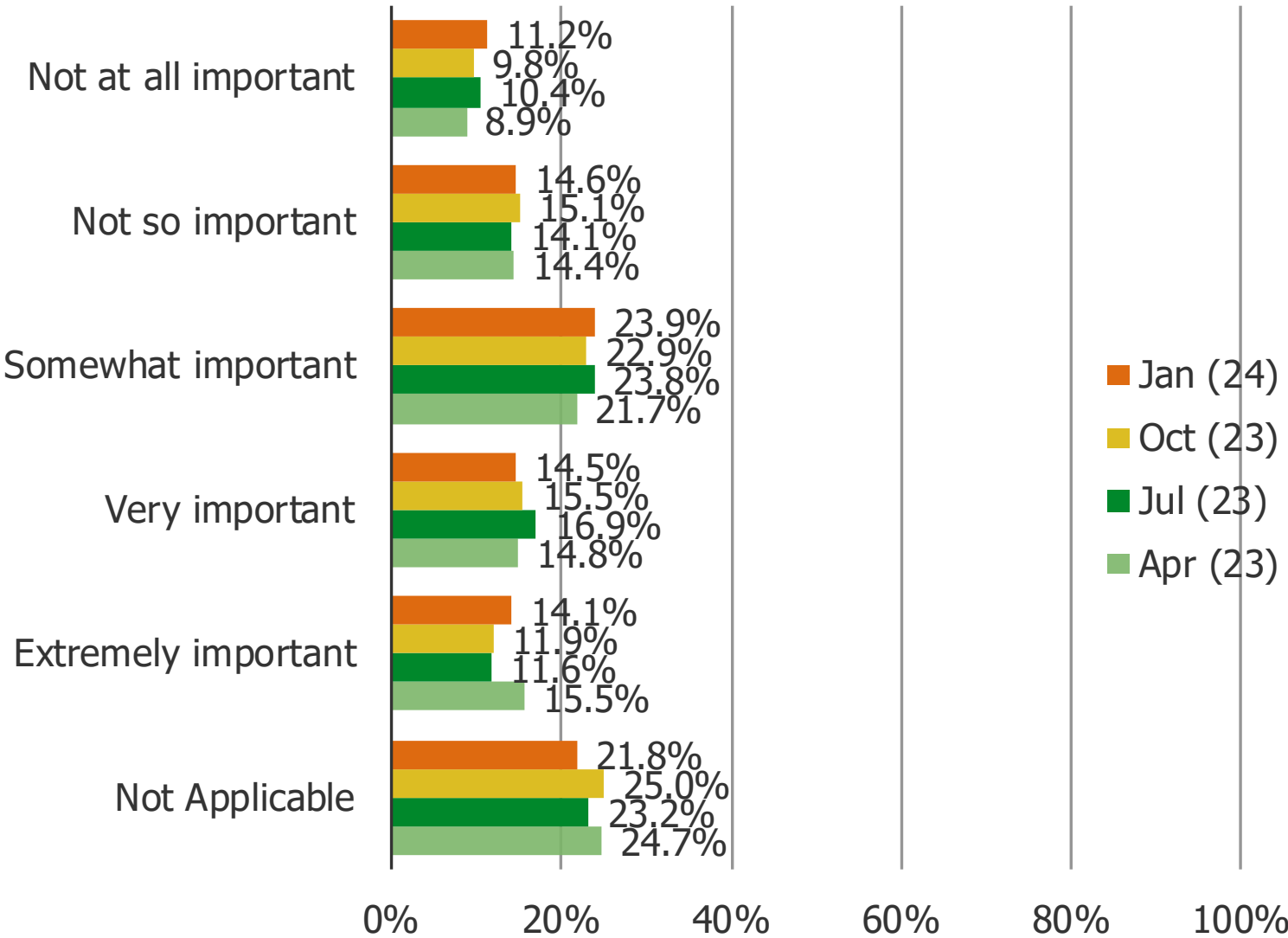
HOW LIKELY ARE YOU TO ADD MORE SPEAKERS FROM THIS BRAND TO YOUR HOME IN THE FUTURE?

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



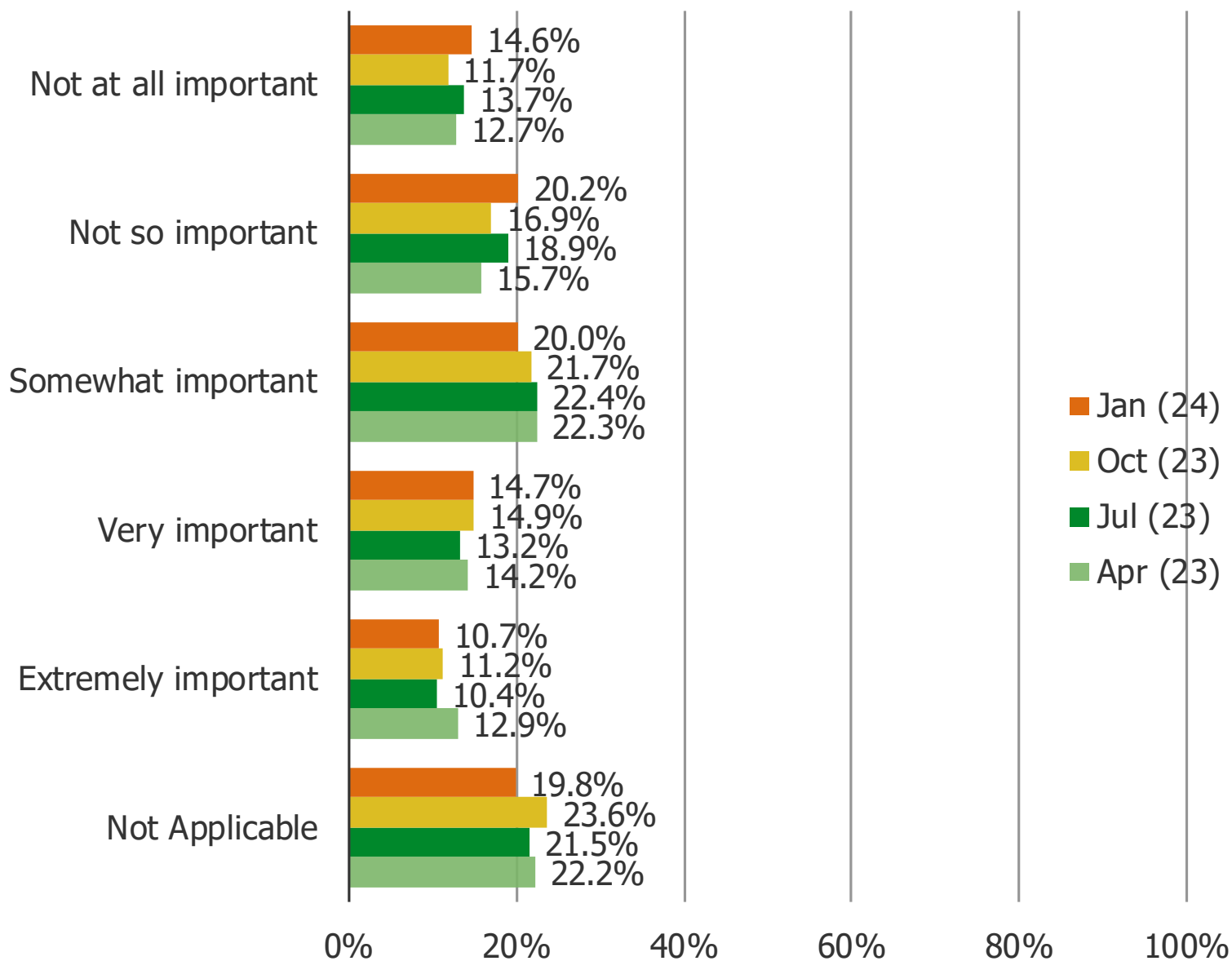
WHEN YOU BUY SPEAKERS, HOW IMPORTANT IS IT TO YOU THAT IT HAS MULTI-ROOM/MULTI-SPEAKER CONNECTIVITY? IE A SPEAKER THAT HAS CONNECTIVITY TO OTHER SPEAKERS TO PLAY THE SAME SONG/AUDIO AT THE SAME TIME ACROSS SPEAKERS THROUGHOUT THE HOUSE)?

This question was posed to all respondents.



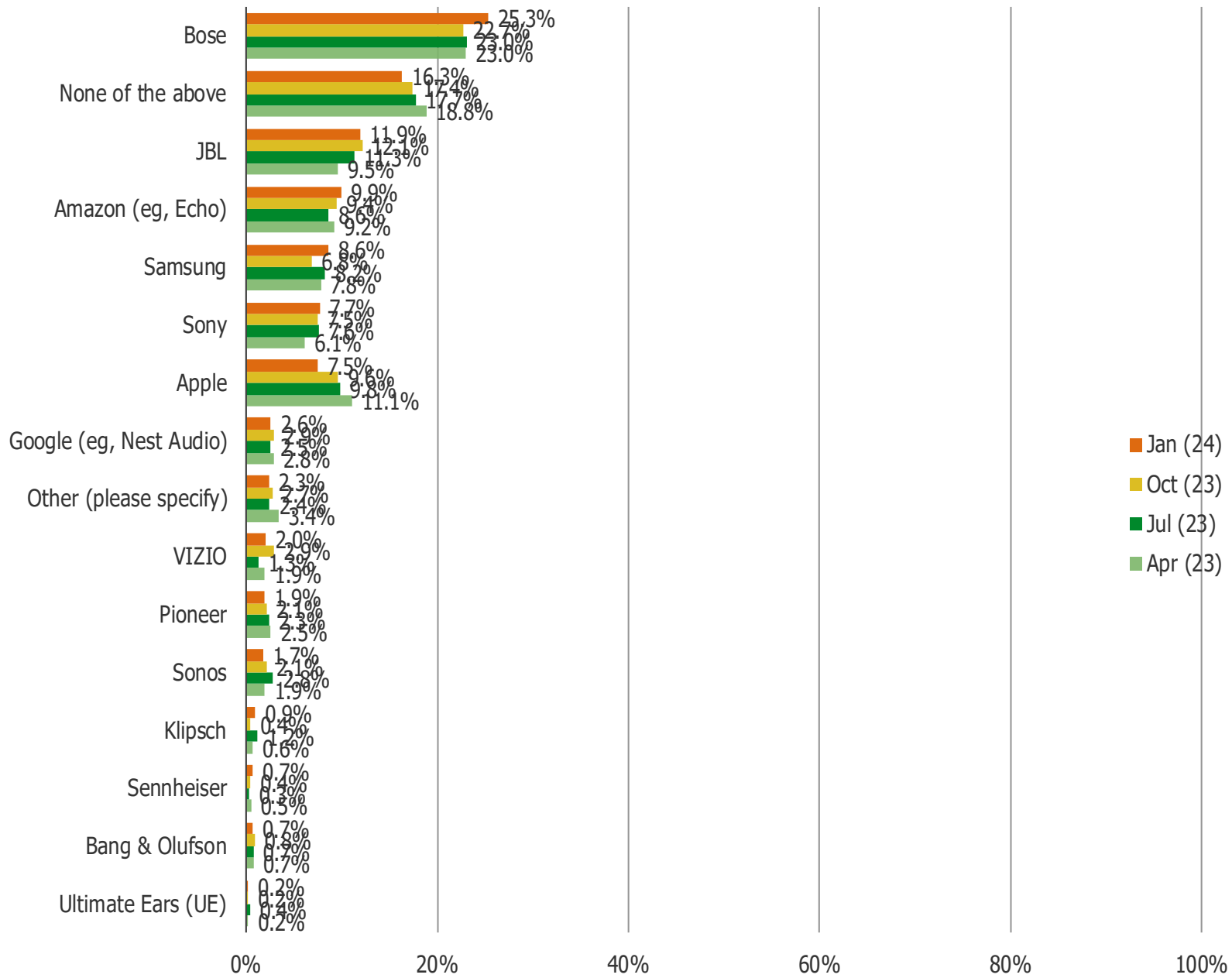
HOW IMPORTANT IS IT TO YOU TO USE ONE SINGLE BRAND OF SPEAKERS THROUGHOUT YOUR HOME?

This question was posed to all respondents.



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

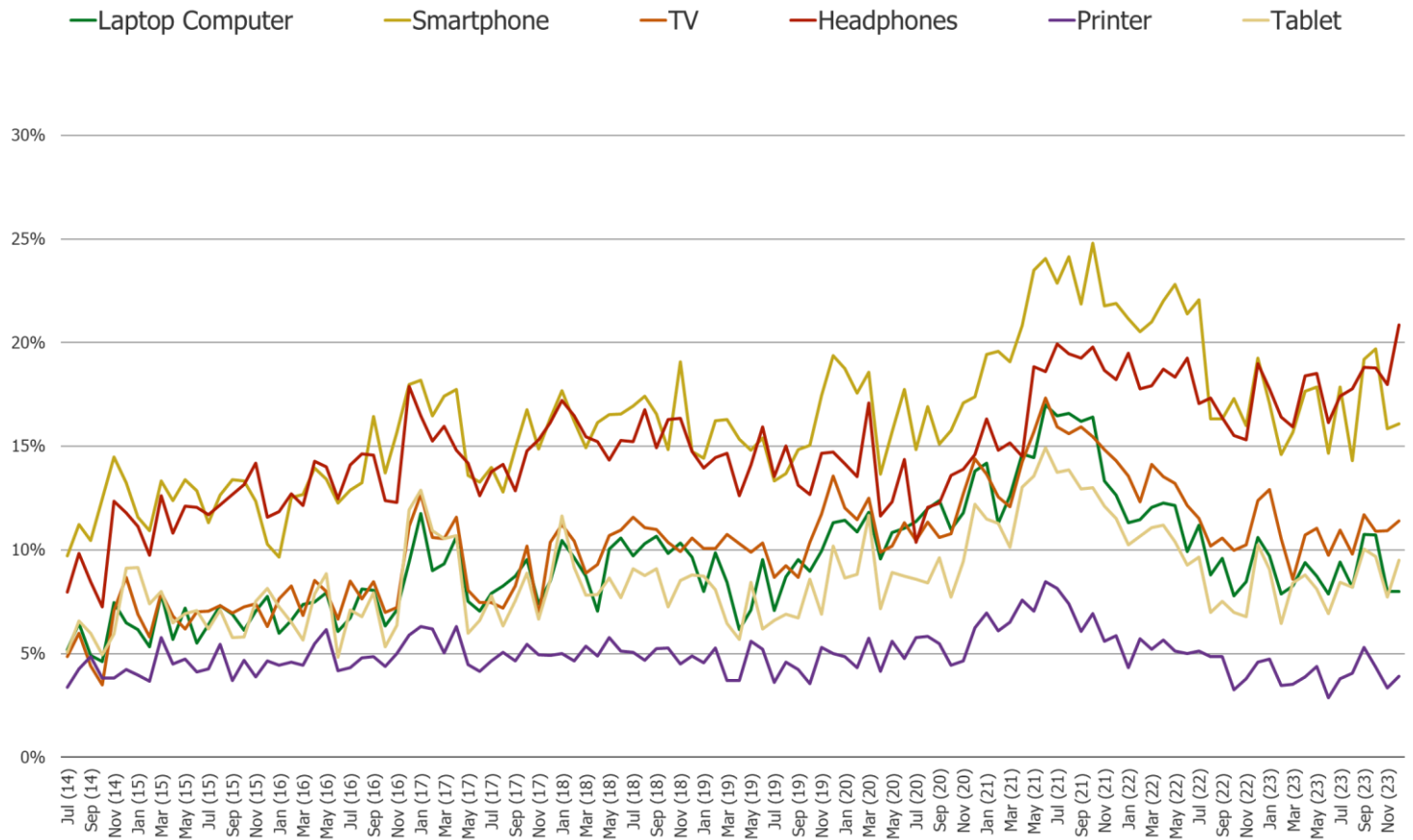
This question was posed to all respondents.



MONTHLY DATA CONSUMER ELECTRONICS ENGAGEMENT

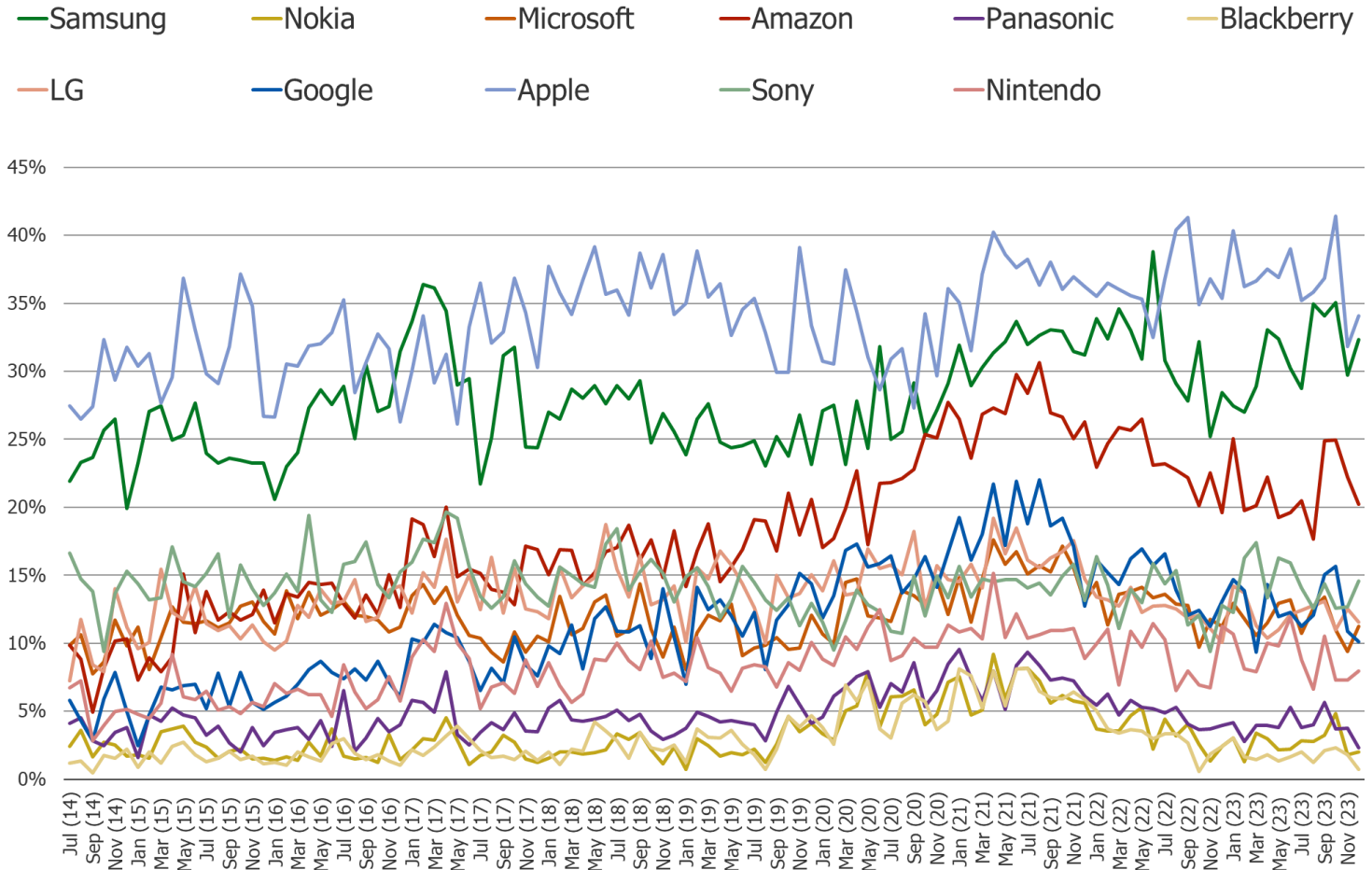
HAVE YOU PURCHASED ANY OF THE FOLLOWING CONSUMER ELECTRONICS PRODUCTS IN THE PAST MONTH?

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.

