

Bespoke Survey Research

April 2024

Consumer Electronics

Volume 45 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: AAPL, AMZN, GOOG, Samsung.

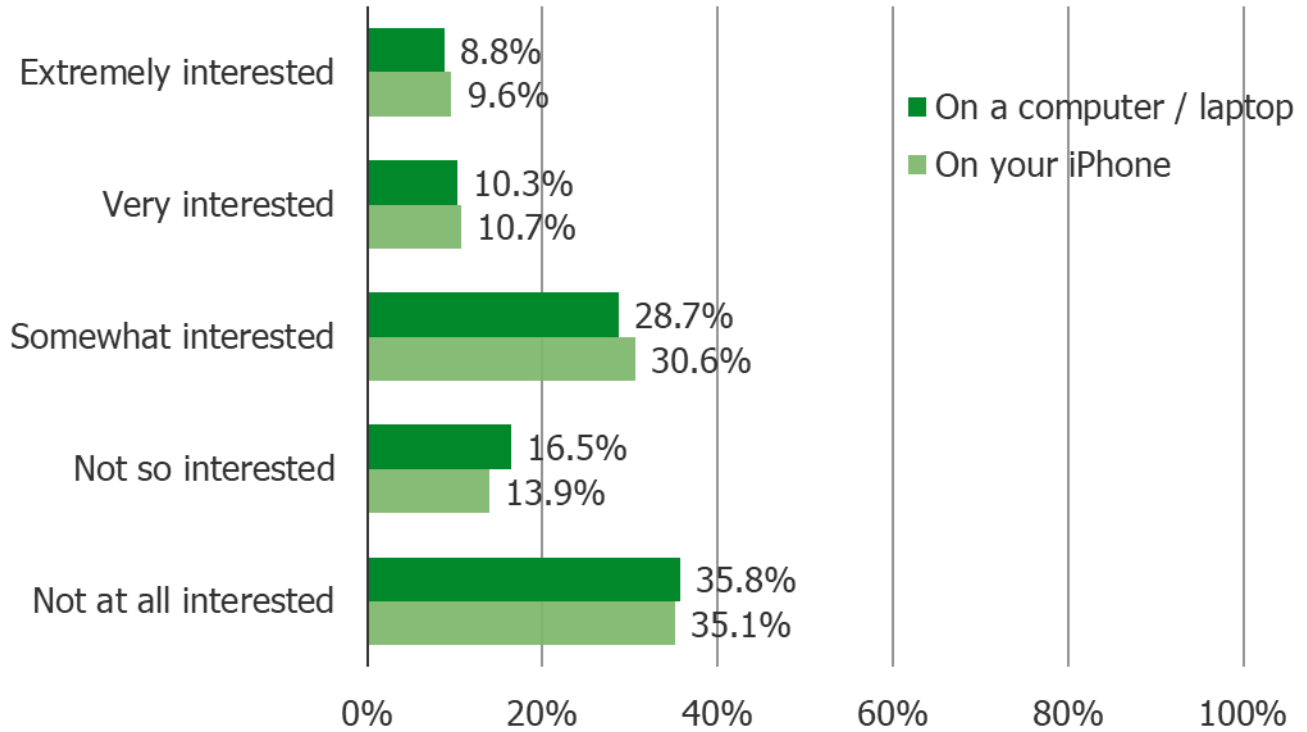
Key Takeaways:

- ❑ Around 24% of iOS users indicated that they would use Siri a little more if it was enhanced by AI.
- ❑ At the margin, interest in AI capable devices declined somewhat q/q.
- ❑ Interest in the Apple Vision Pro has increased slightly over time.
- ❑ Smartphone refresh cycles are stretching slightly with the share who hold on to their smartphone for longer than two years increasing q/q in our trackers.
- ❑ With regard to whether AI will bring about a smartphone refresh super cycle, we continue to hear from a large share of consumers that it would depend on what AI can do for them in the future.
- ❑ Smartphone market share trends were largely unchanged sequentially. Most smartphone owners have owned either iOS or Android for three consecutive cycles (over 80%).
- ❑ The share of iPhone owners who got their iPhone during the past three months declined q/q and y/y (coming in at around the same level we observed in April of 2022).
- ❑ Consumer opinions of Apple as a brand inflected positively in February of 2023 and has held on to those positive gains since then.

NEW QUESTIONS

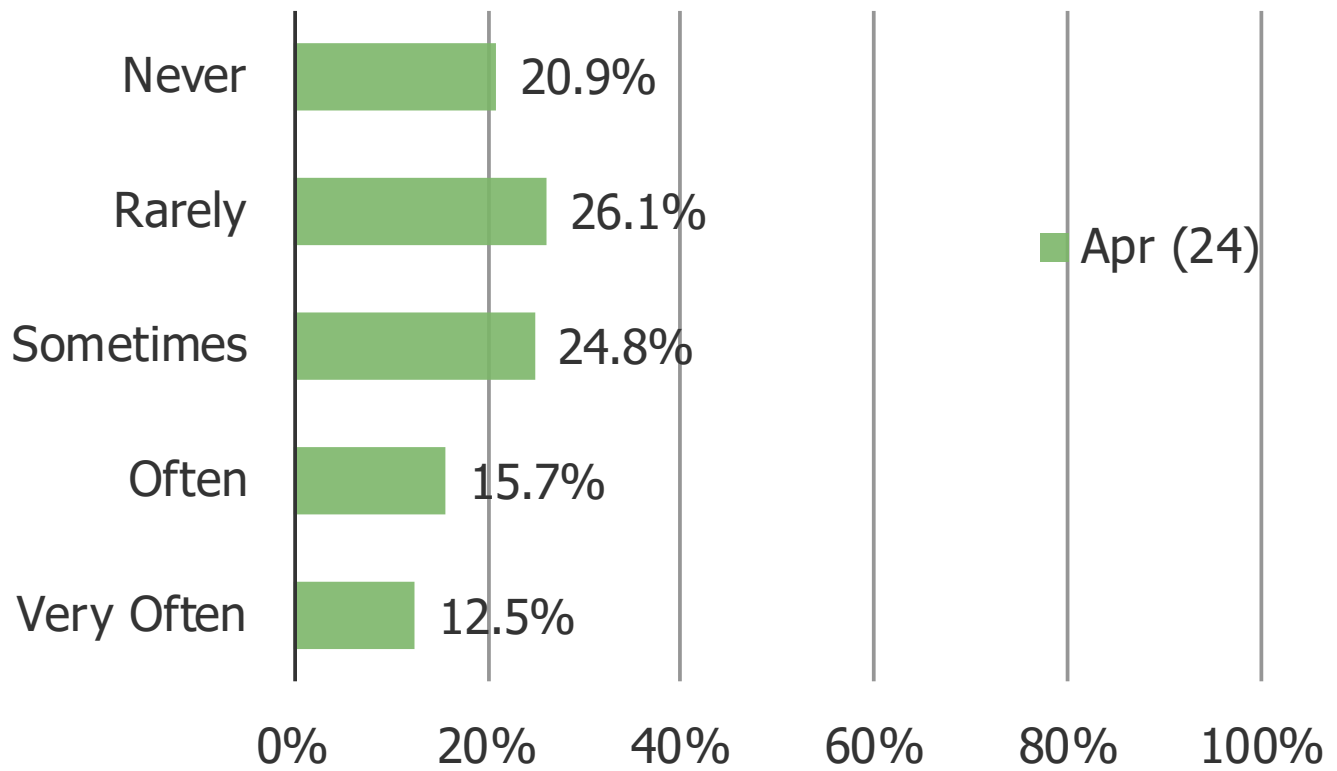
IF APPLE HAD ITS OWN AI CHATBOT (LIKE CHATGPT, BARD, COPILOT, ETC) HOW INTERESTED WOULD YOU BE USING IT...?

This question was posed to all respondents who are iOS users.



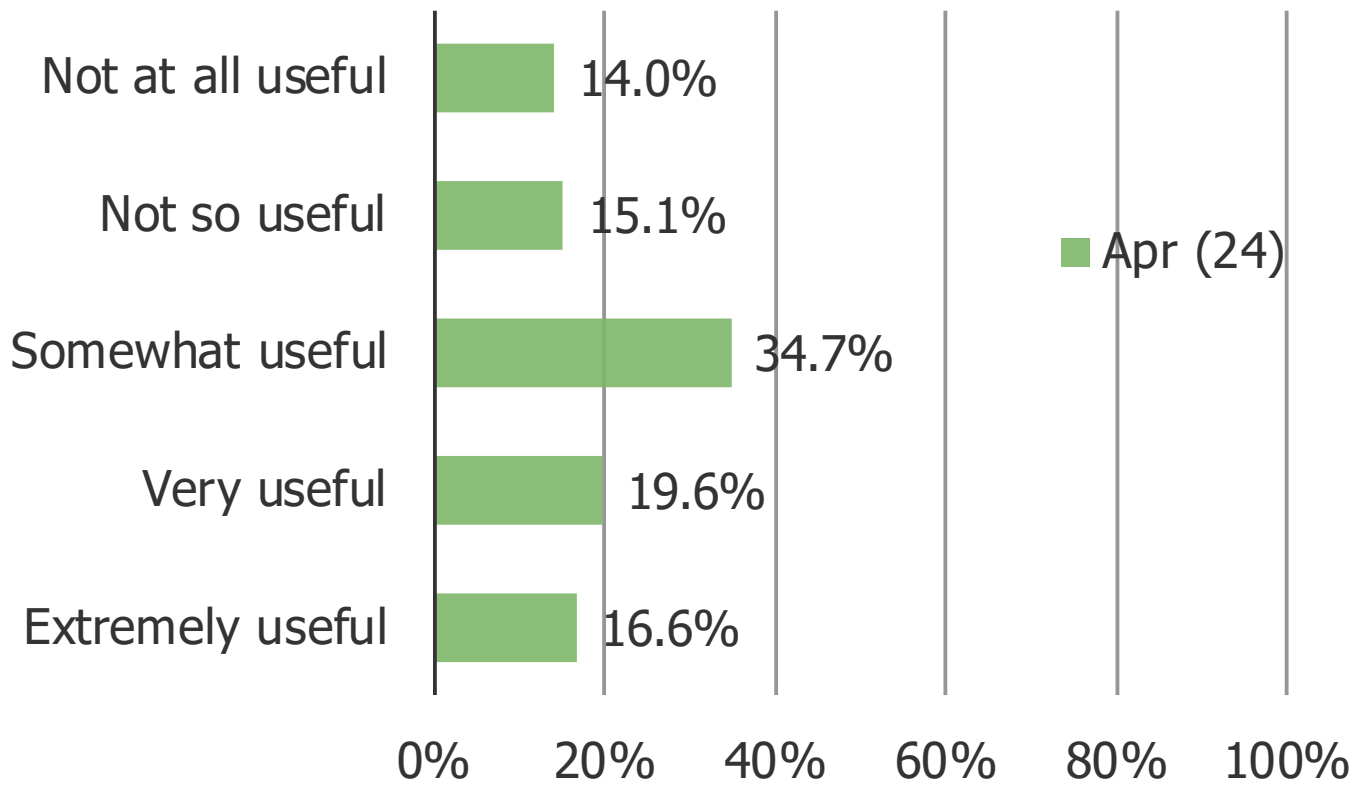
HOW OFTEN DO YOU USE SIRI ON YOUR IPHONE NOW?

This question was posed to all respondents who are iOS users.



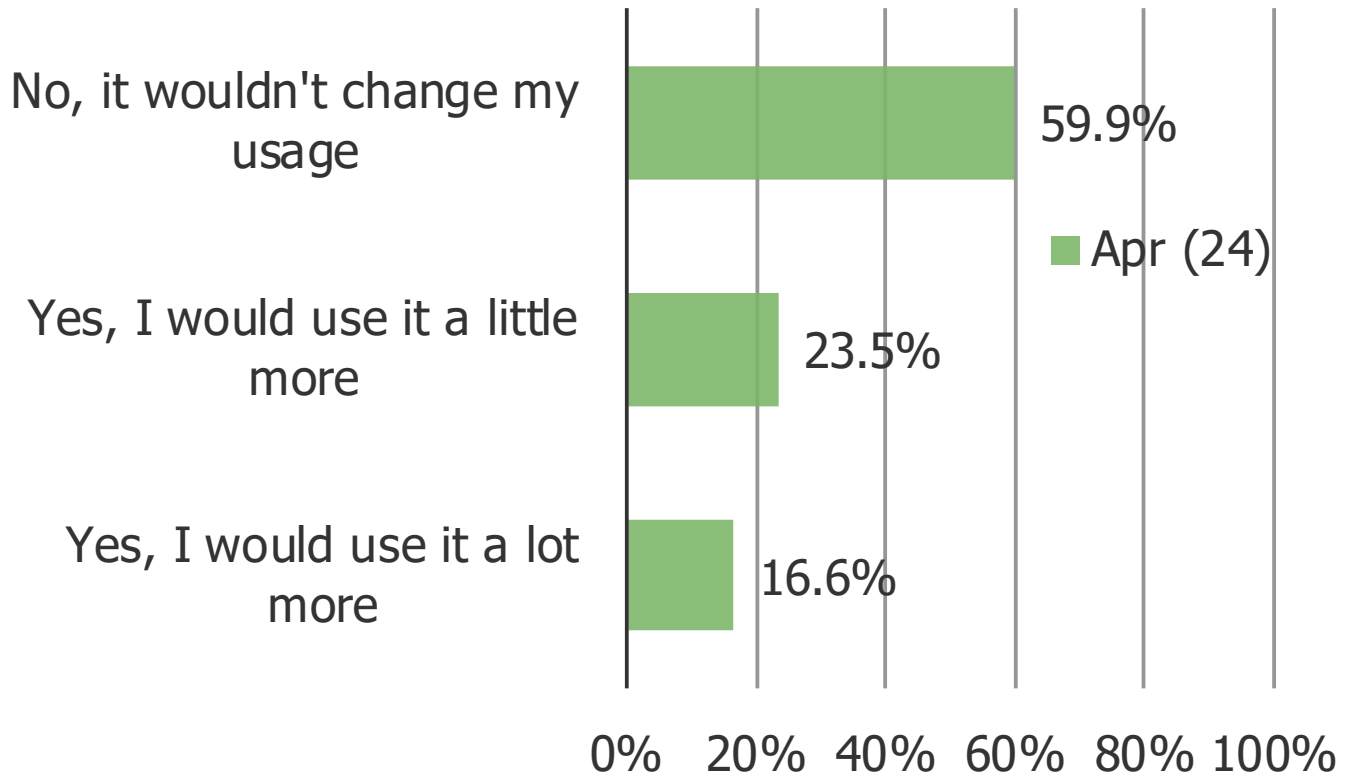
HOW USEFUL DO YOU FIND SIRI TO BE?

This question was posed to all respondents who are iOS users.



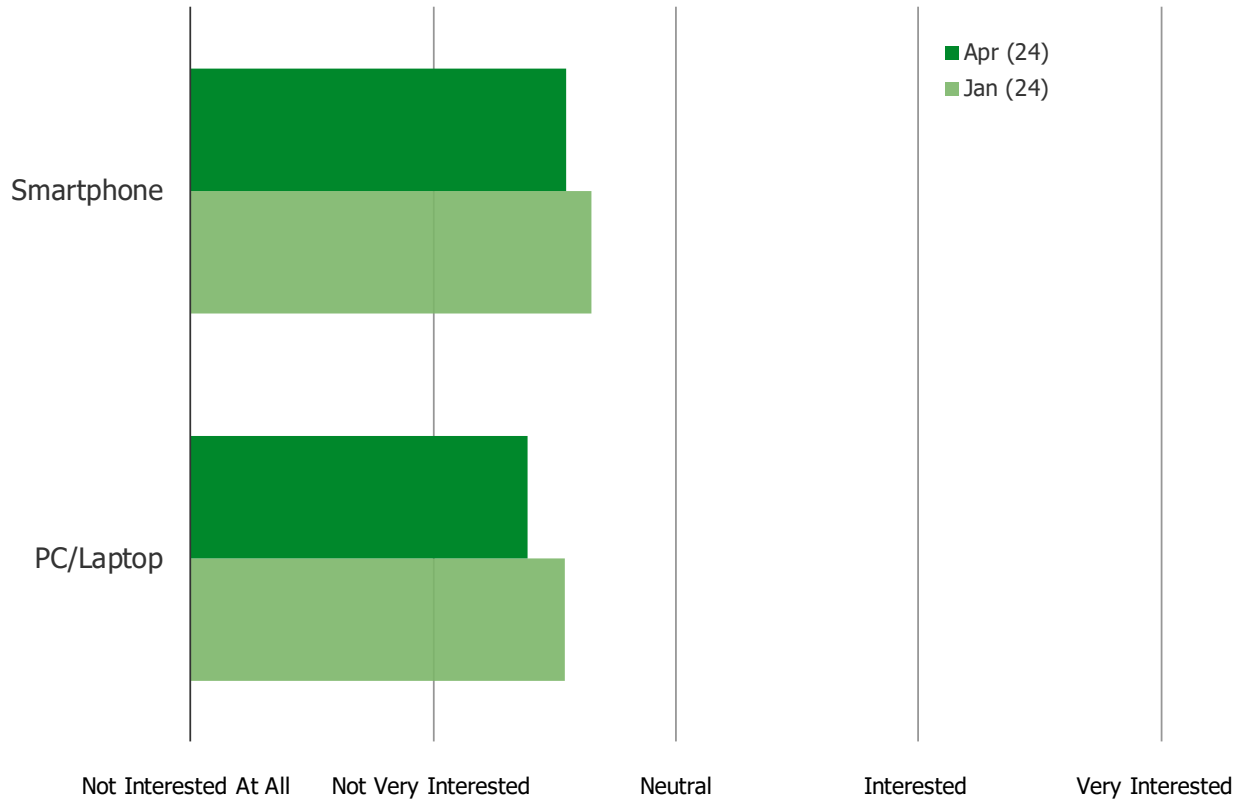
WOULD YOU CHANGE YOUR USAGE OF SIRI IF SIRI WAS ENHANCED BY AI (ARTIFICIAL INTELLIGENCE)

This question was posed to all respondents who are iOS users.

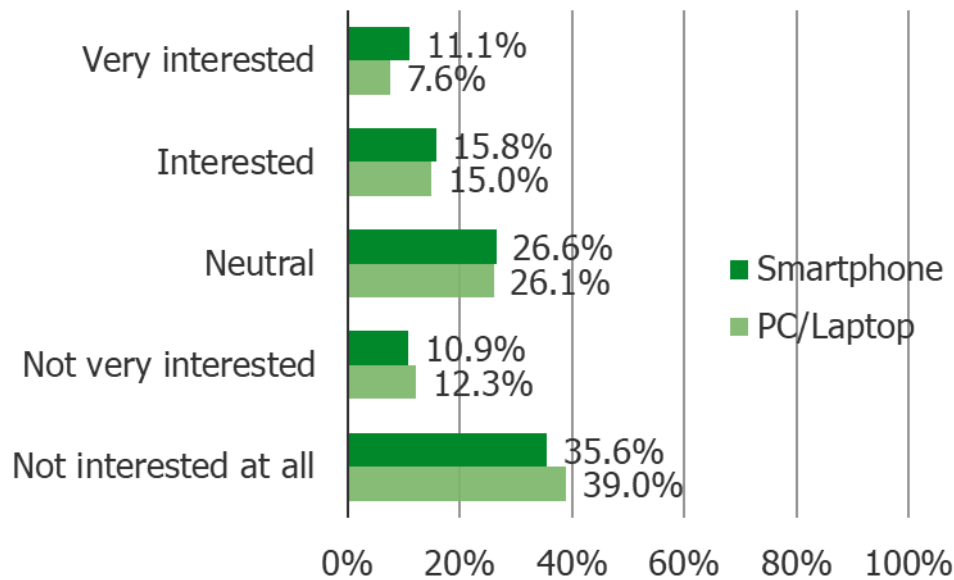


HOW INTERESTED ARE YOU IN USING AI (ARTIFICIAL INTELLIGENCE) CHATBOTS AND APPS, LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, ETC) WHILE USING THE FOLLOWING DEVICES...

This question was posed to all respondents.

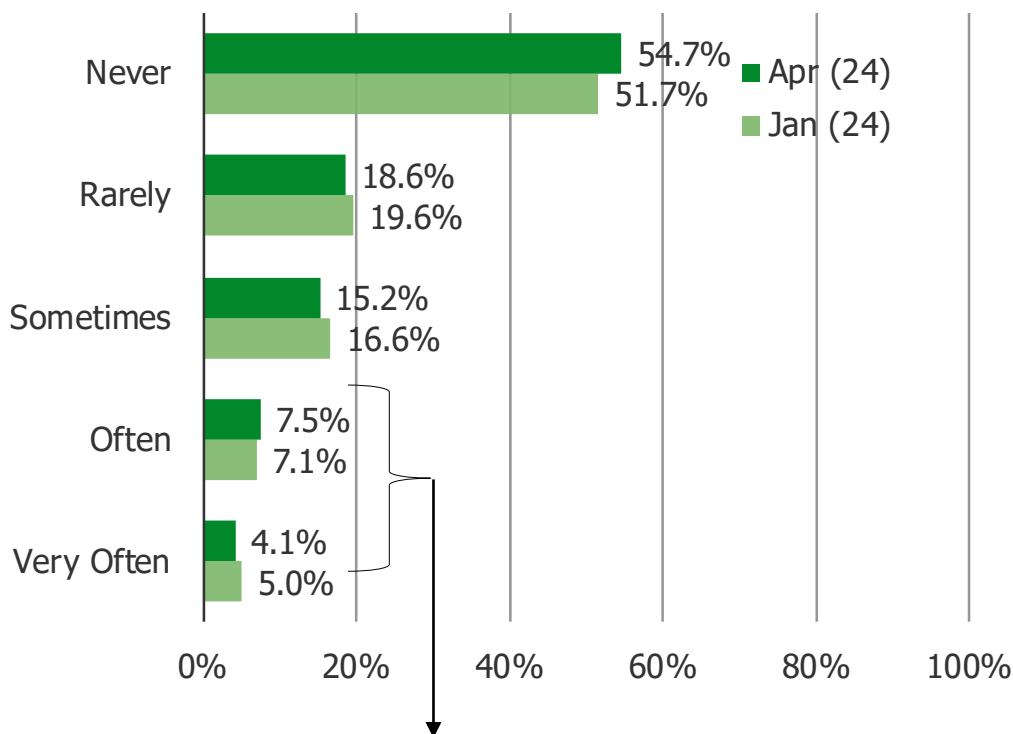


April 2024 Data Breakout

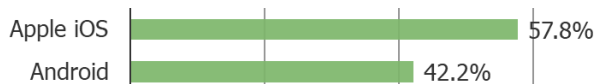


HOW OFTEN DO YOU USE AI CHATBOTS LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, OR OTHERS IN YOUR LIFE?

This question was posed to all respondents.



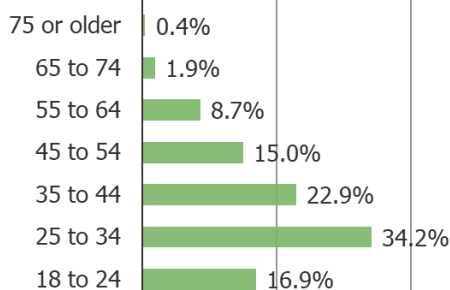
Current OS



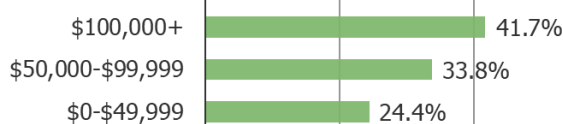
Gender



Age

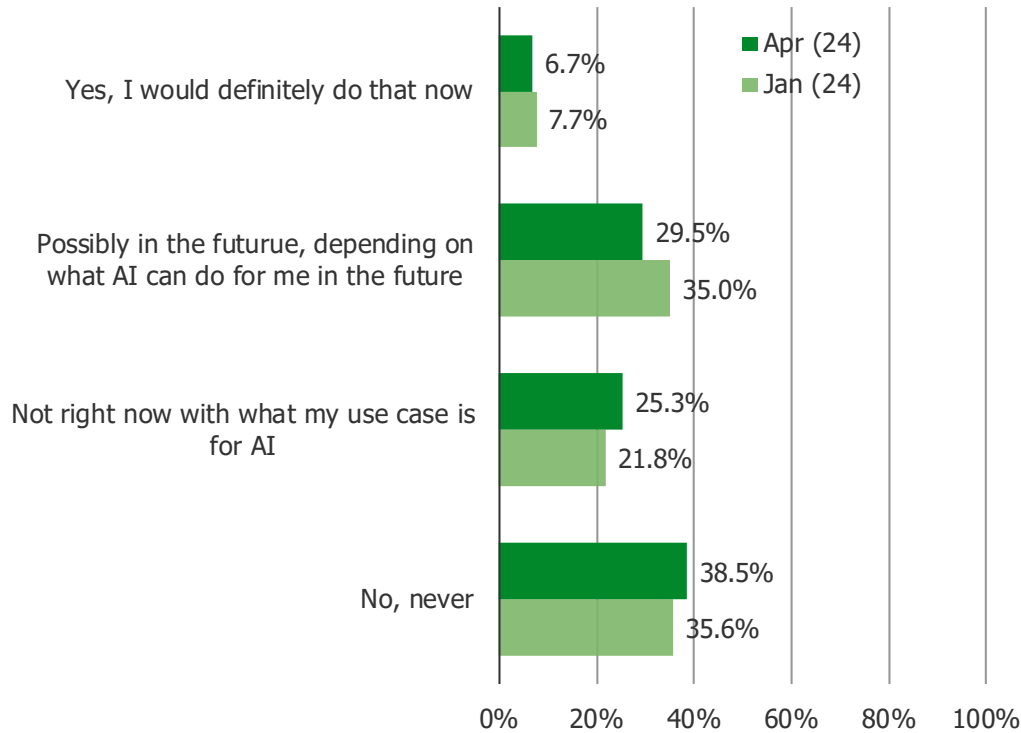


Income

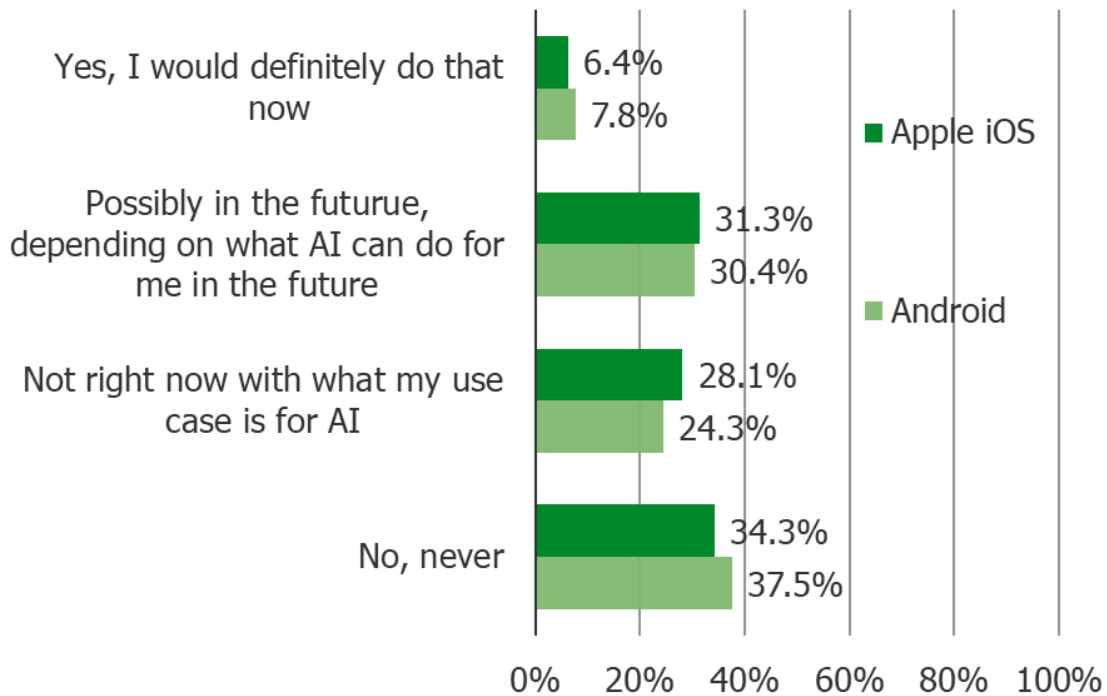


COULD YOU EVER SEE YOURSELF GOING OUT AND BUYING A NEW SMARTPHONE OR LAPTOP IF THOSE DEVICES WERE ABLE TO WORK BETTER WITH AI RELATED APPS THAN THE EXISTING ONES YOU OWN?

This question was posed to all respondents.

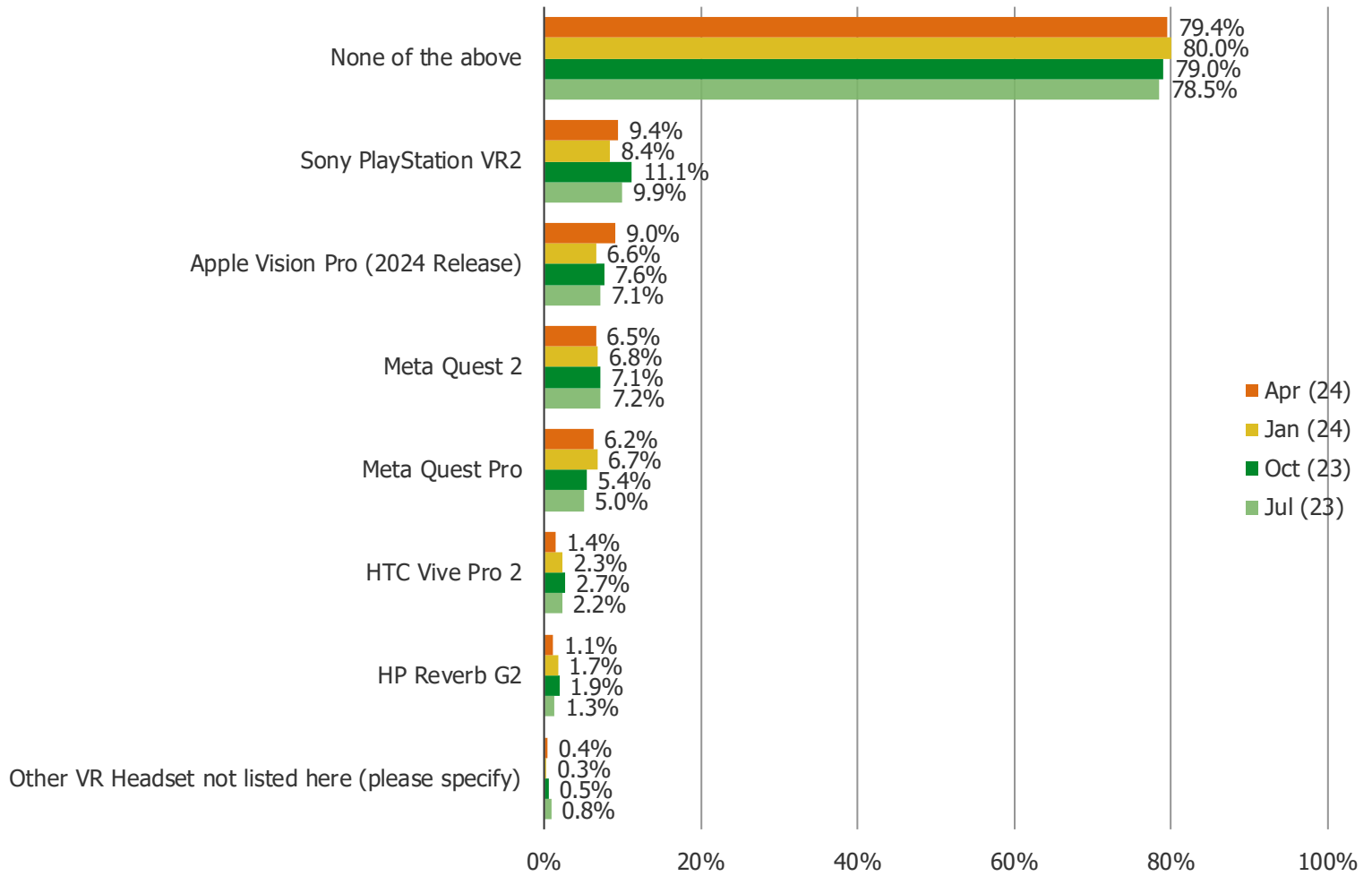


Cross-Tabbing The Above Data: OS they are currently using...



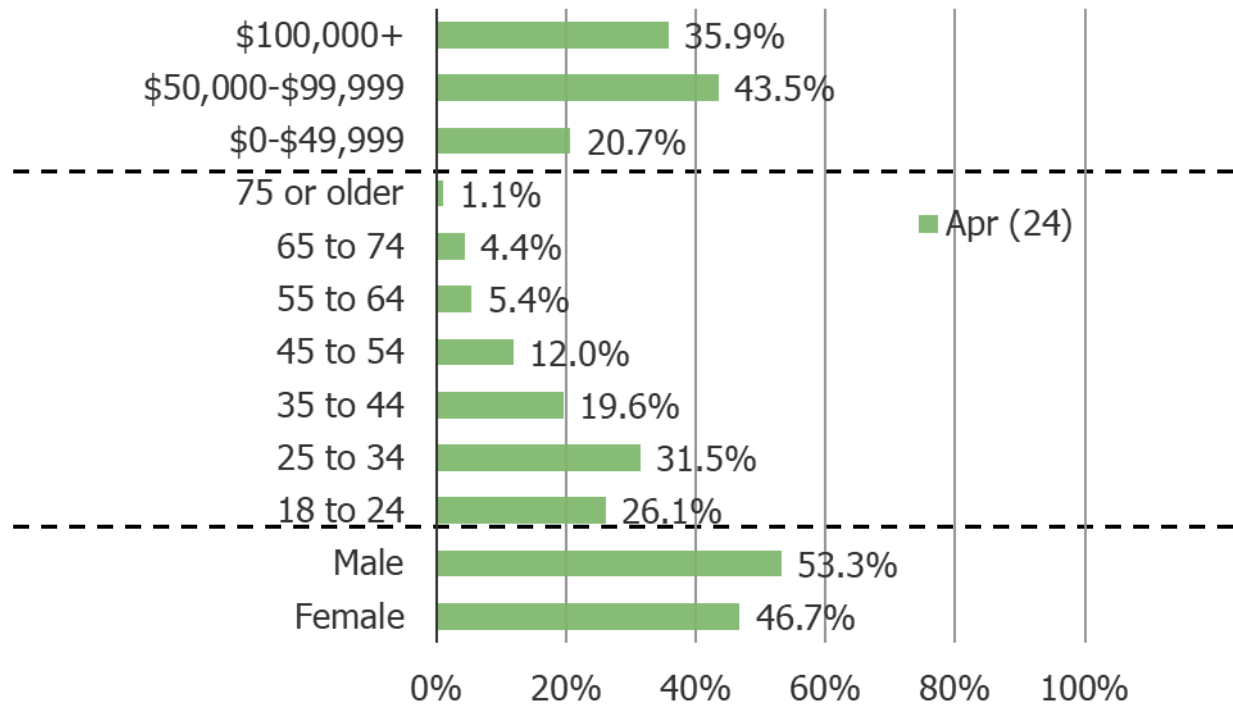
DO YOU HAVE ANY INTEREST IN THE FOLLOWING PRODUCTS? SELECT ALL THAT APPLY

This question was posed to all respondents.



DEMOGRAPHICS OF THOSE INTERESTED IN THE VISION PRO

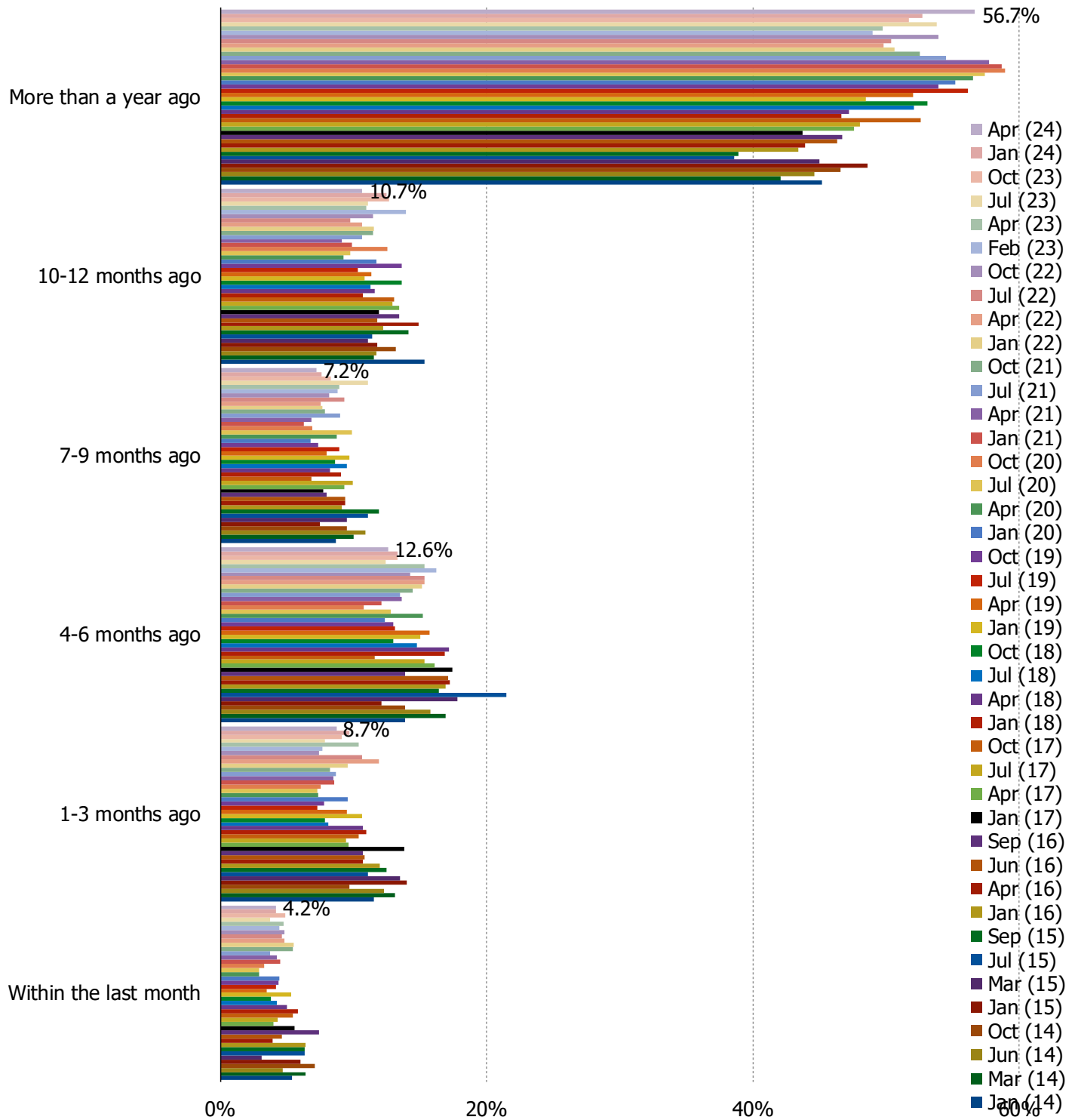
Cross-Tabbing respondents who said they are interested in the upcoming Apple Vision Pro product (N = 92)



SMARTPHONE REFRESH CYCLES

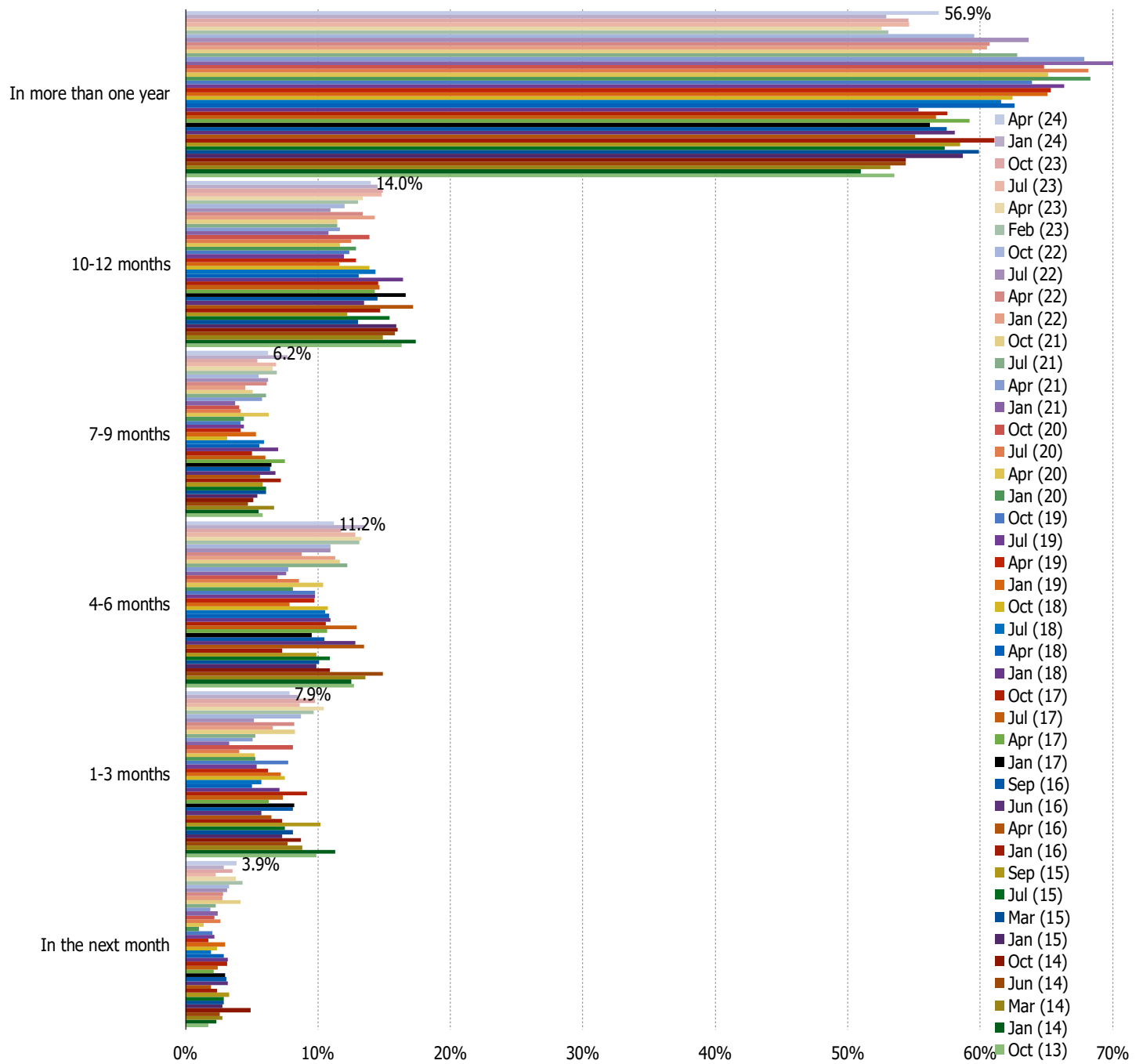
WHEN DID YOU GET YOUR CURRENT SMARTPHONE?

This question was posed to smartphone owners.



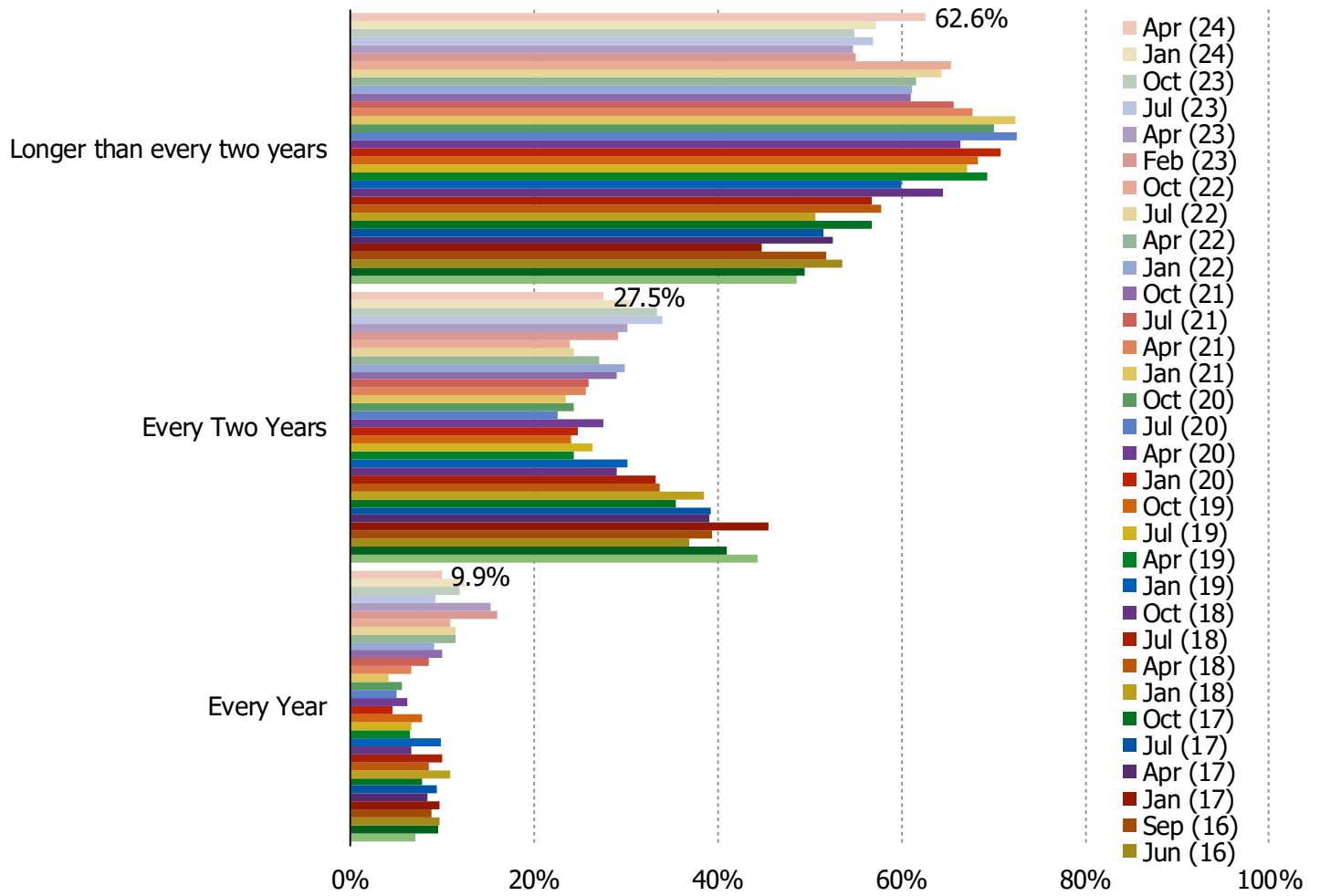
EXPECTED DATE OF NEXT SMARTPHONE PURCHASE

This question was posed to smartphone owners.



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

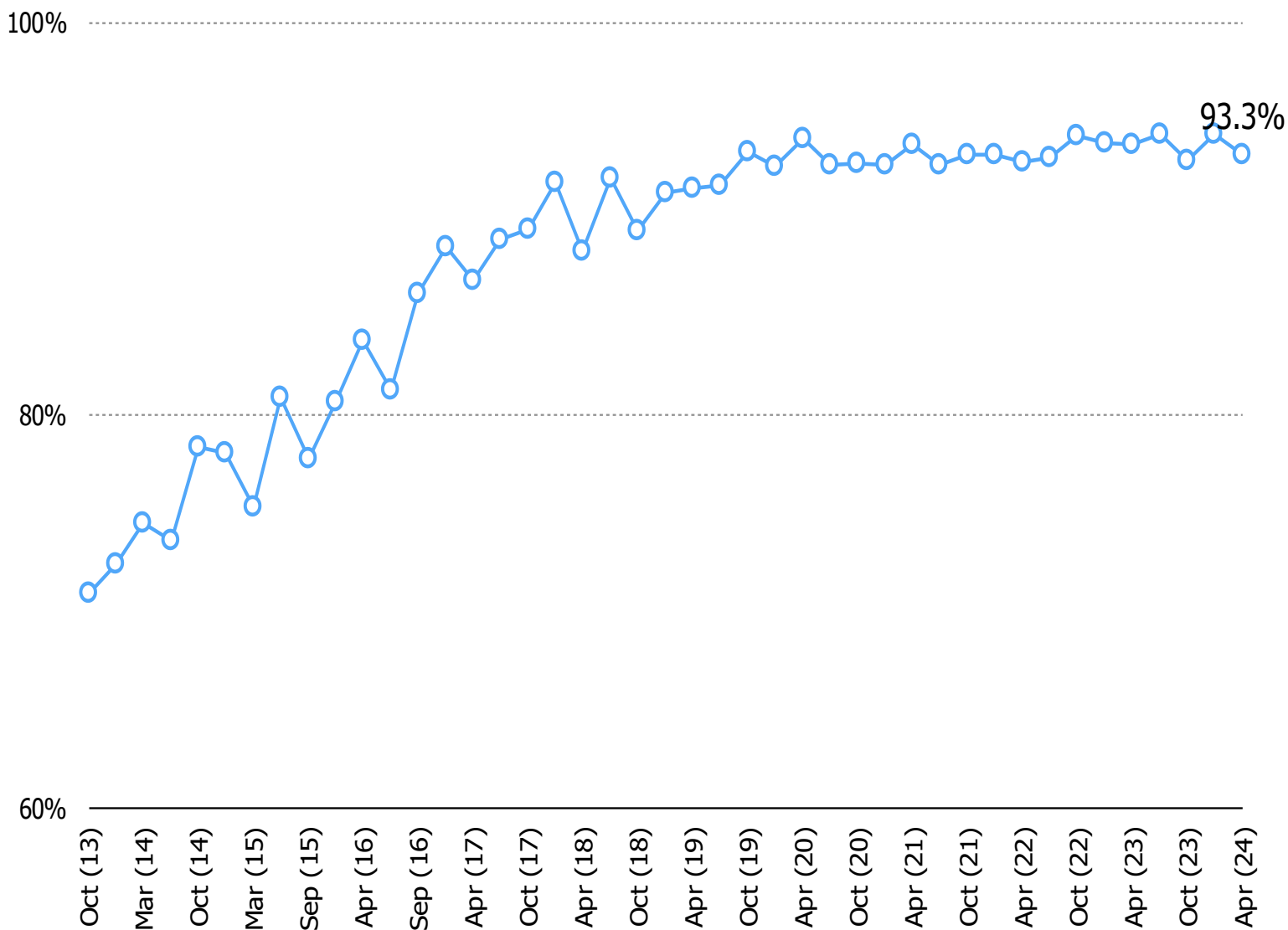
This question was posed to smartphone owners.



SMARTPHONE MARKET SHARE

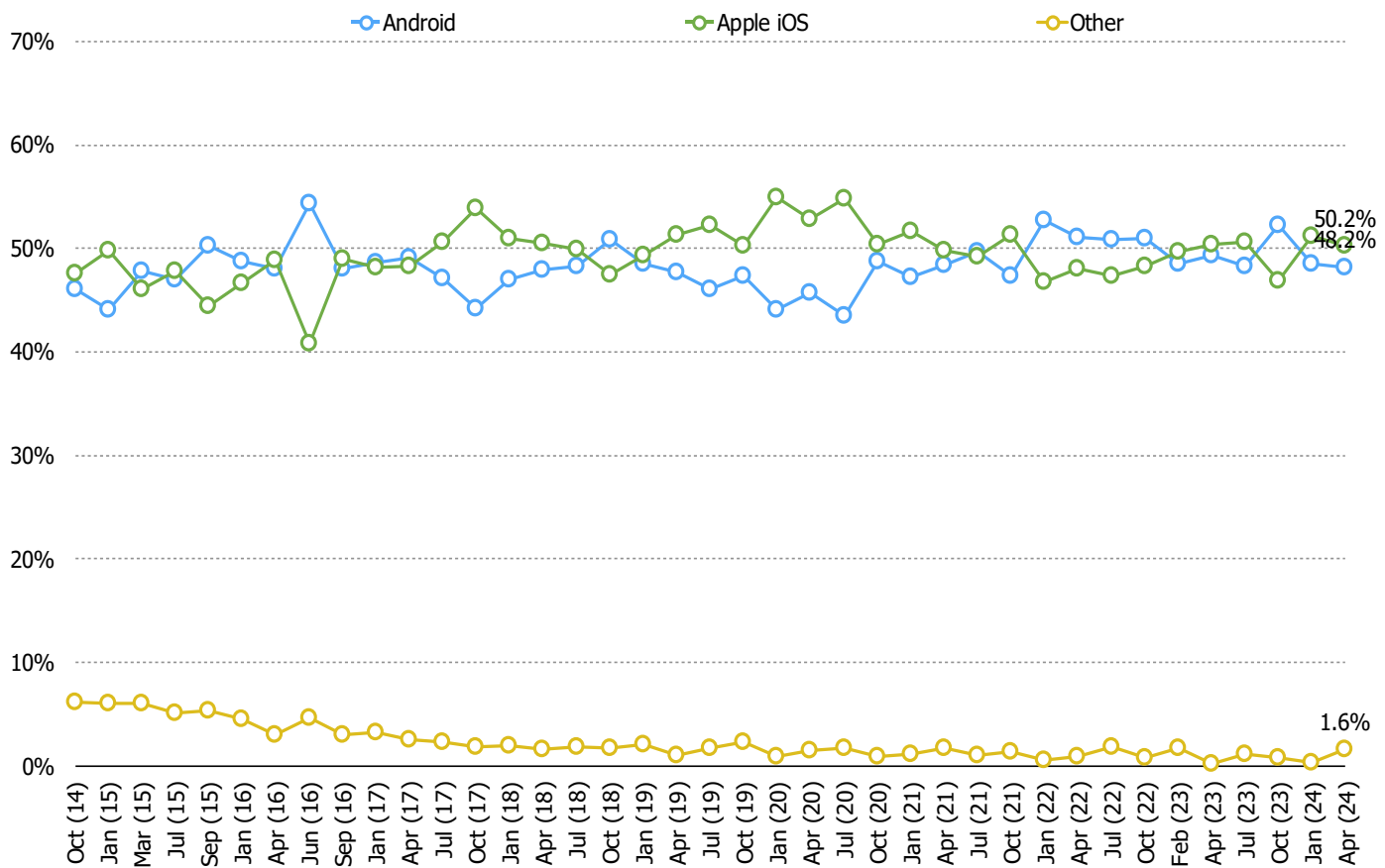
DO YOU OWN A SMARTPHONE?

This question was posed to all consumers.



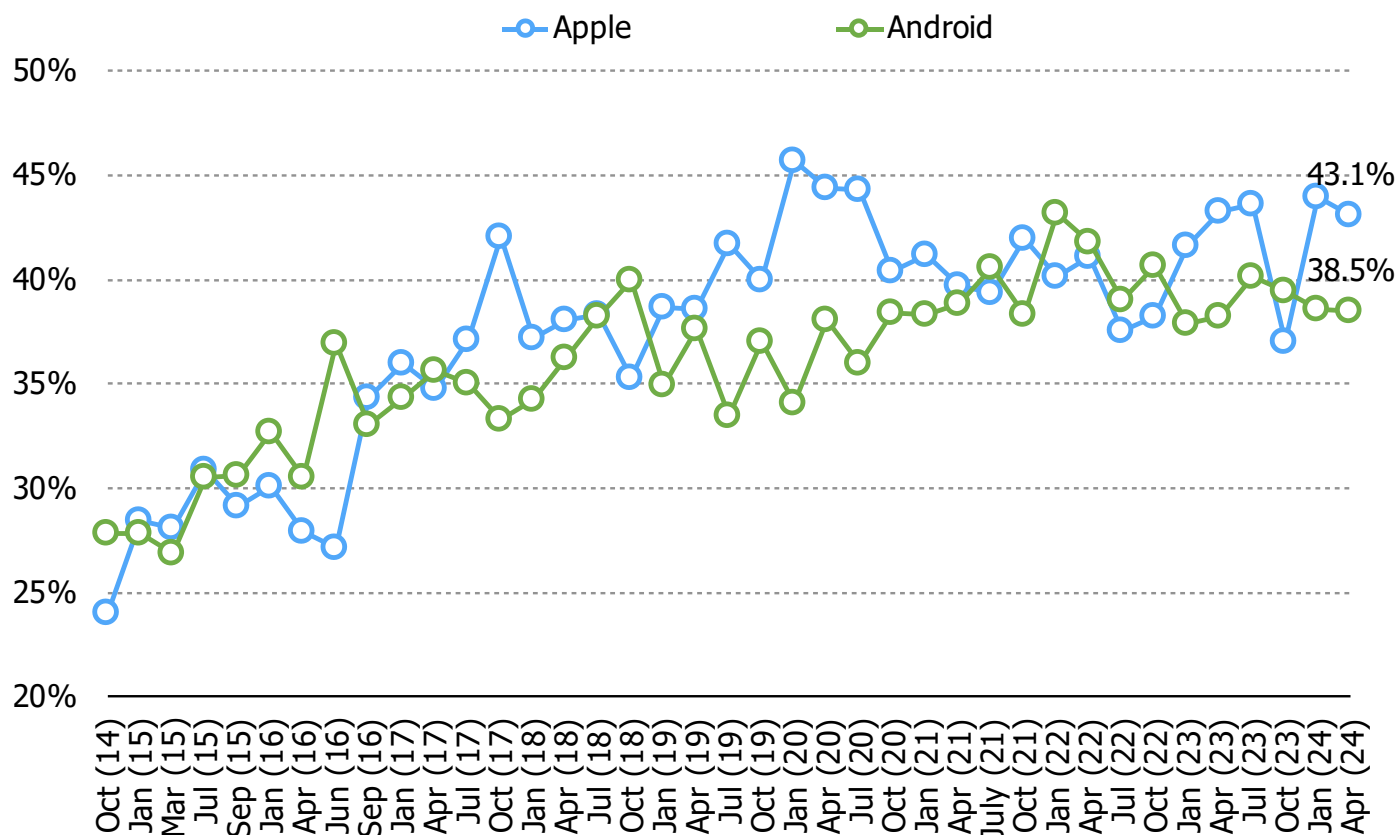
CURRENT OPERATING SYSTEM FOR SMARTPHONE

This question was posed to smartphone owners.



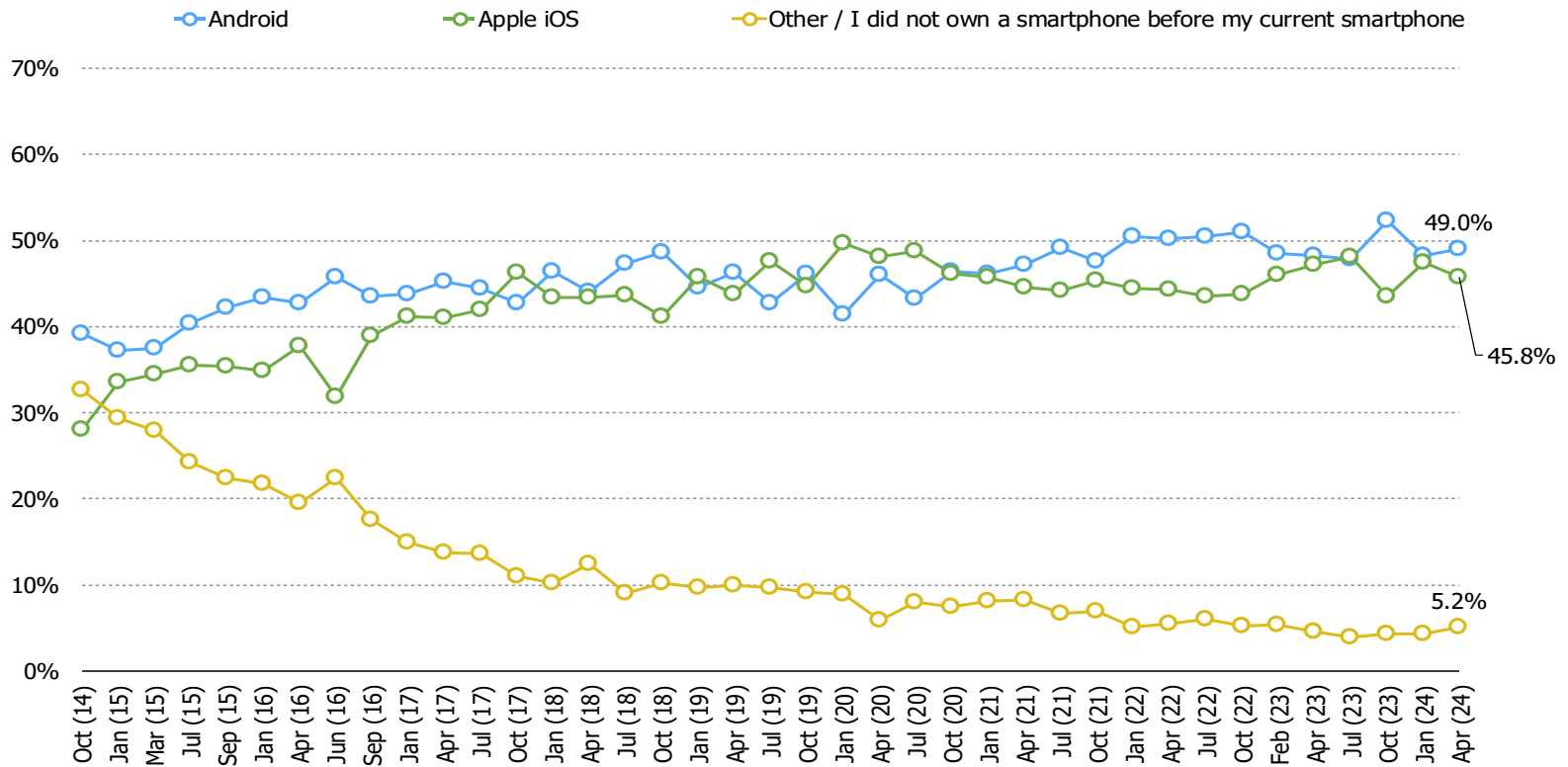
“TRIPLE PLAYS” – PERCENTAGE OF SMARTPHONE OWNERS WHO OWN THE SAME OPERATING SYSTEM FOR LAST PHONE, CURRENT PHONE, AND PLAN TO USE SAME FOR NEXT PHONE

This question was posed to smartphone owners.



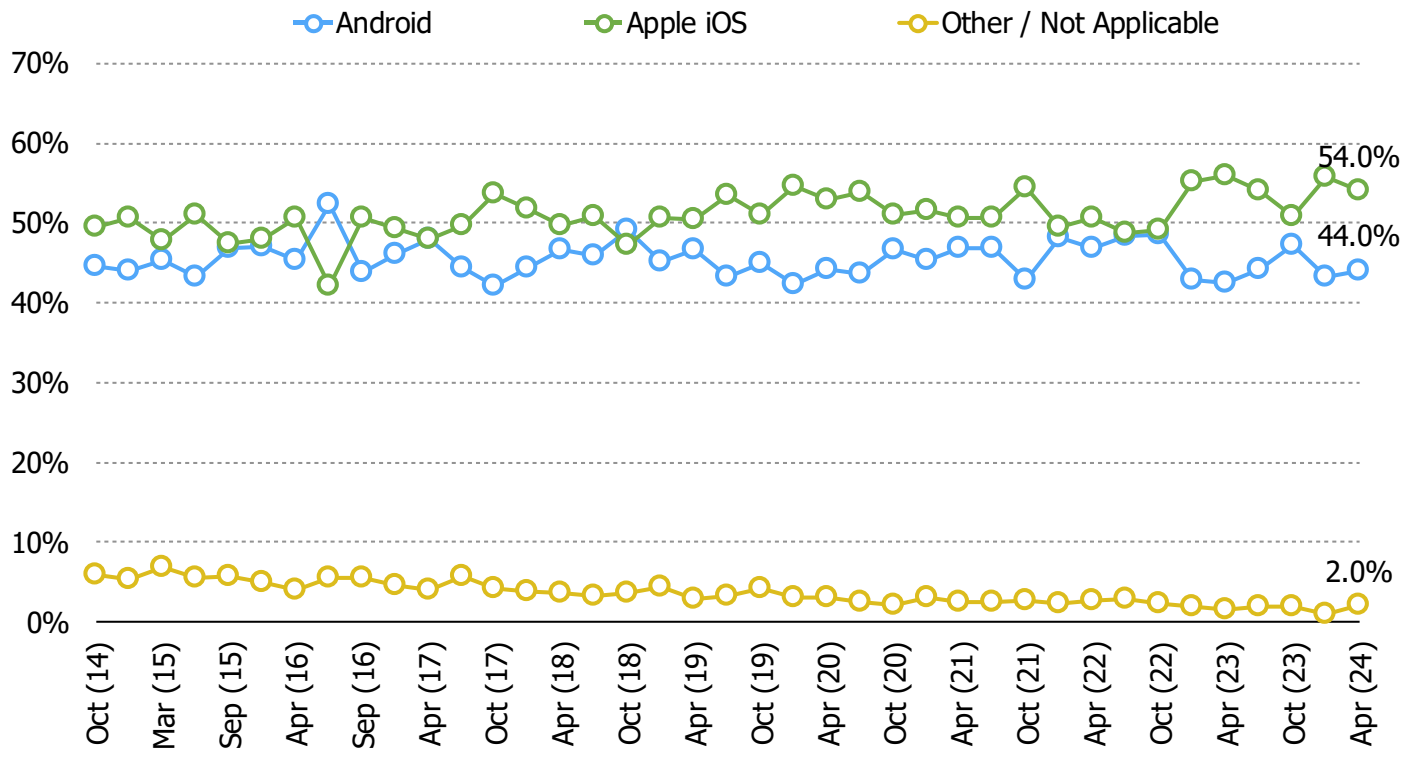
OPERATING SYSTEM FOR SMARTPHONE BEFORE CURRENT SMARTPHONE

This question was posed to smartphone owners.



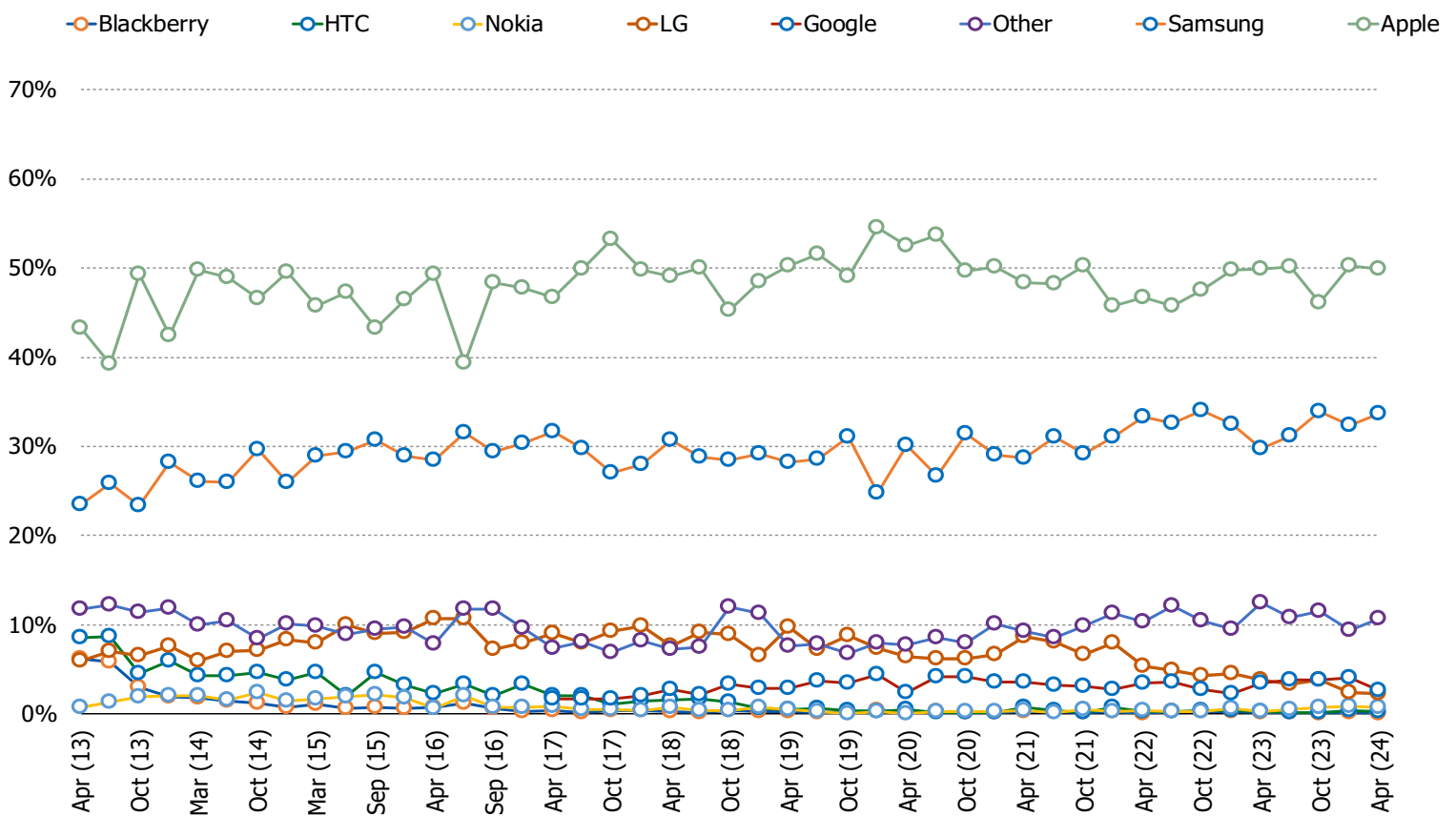
OPERATING SYSTEM FOR NEXT SMARTPHONE

This question was posed to smartphone owners.



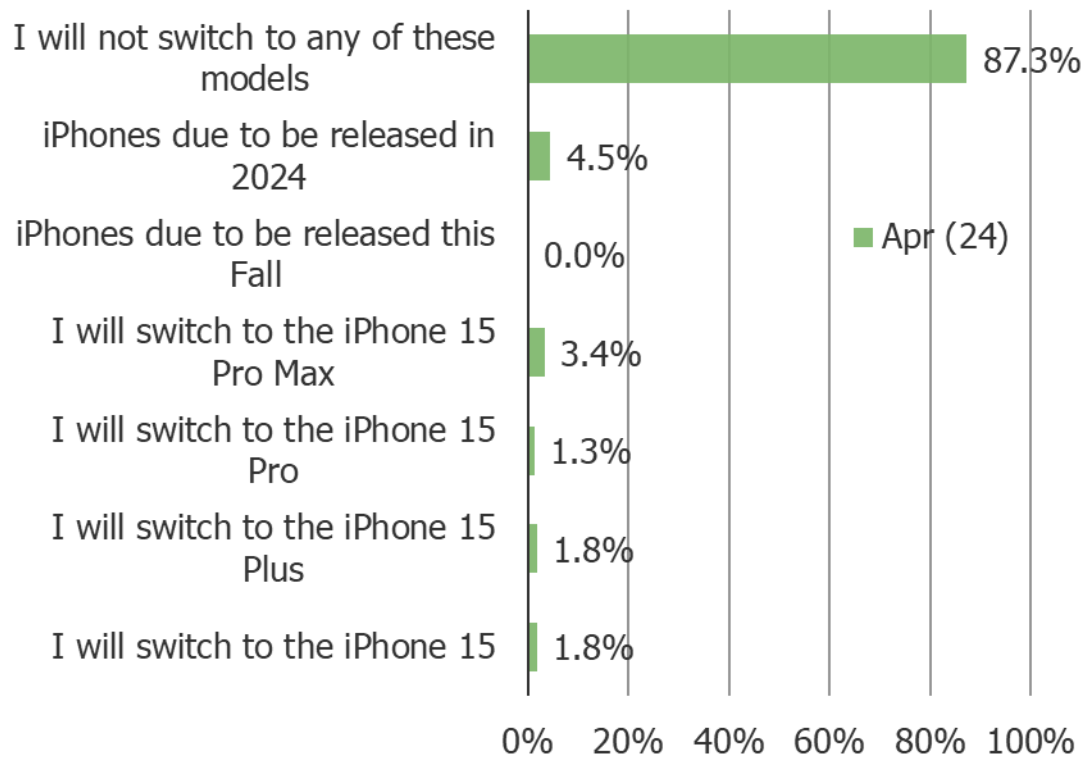
MARKET SHARE - SMARTPHONES

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?

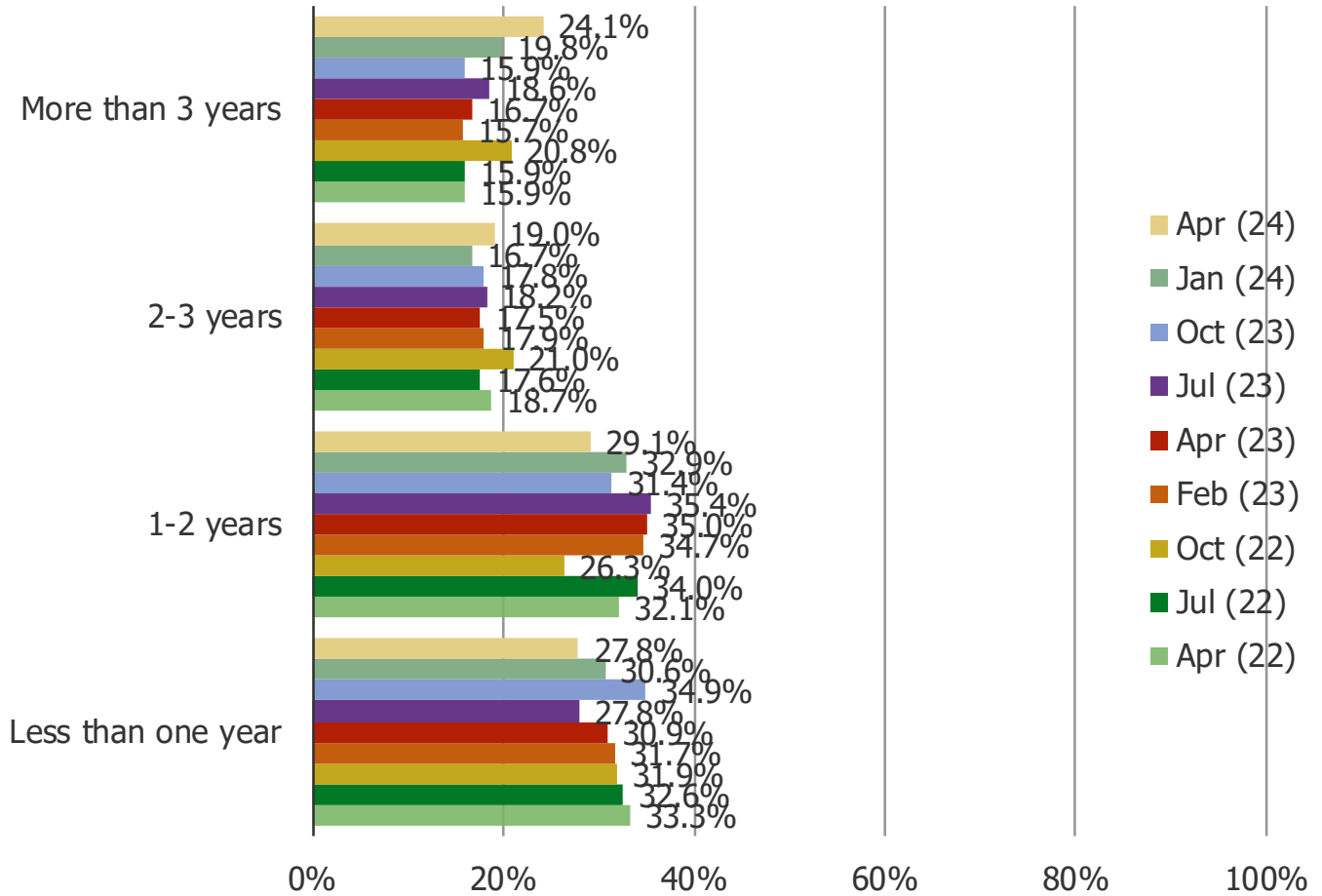
This question was posed to Android smartphone owners.



IPHONE PURCHASE PREFERENCES AND TESTING A LEASING MODEL

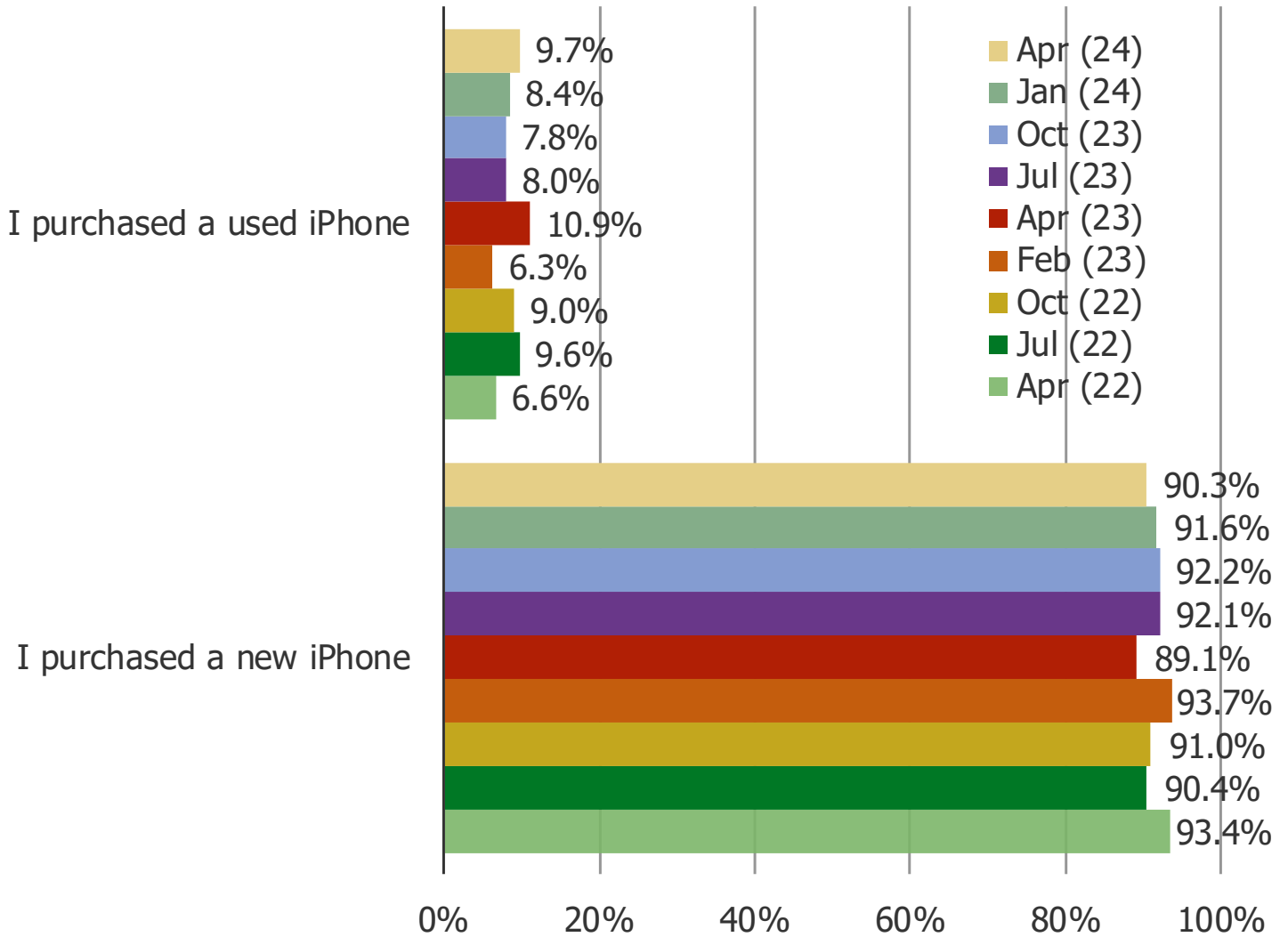
FOR HOW LONG HAVE YOU OWNED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



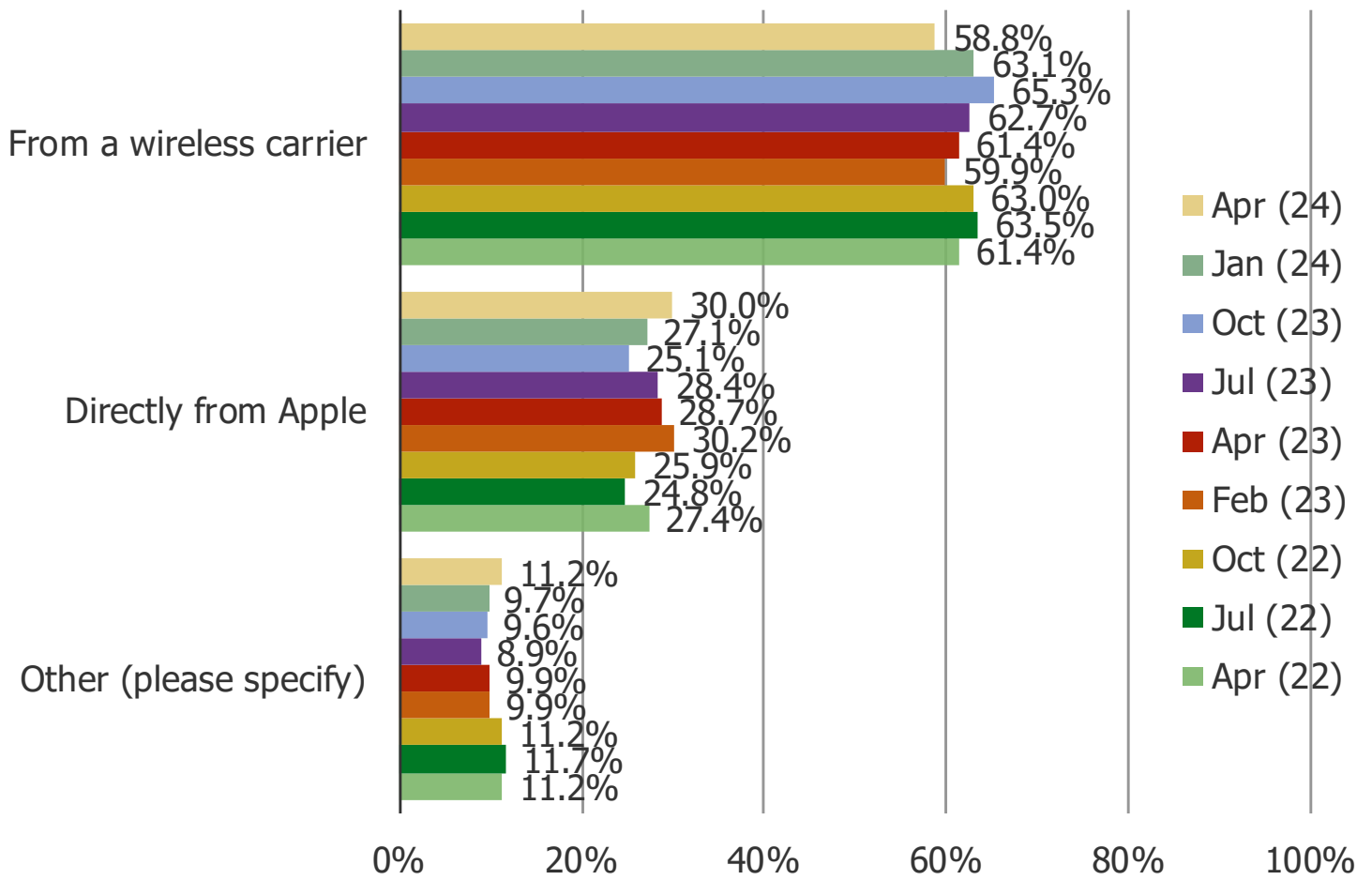
HOW DID YOU PURCHASE YOUR IPHONE?

This question was posed to iPhone owners.



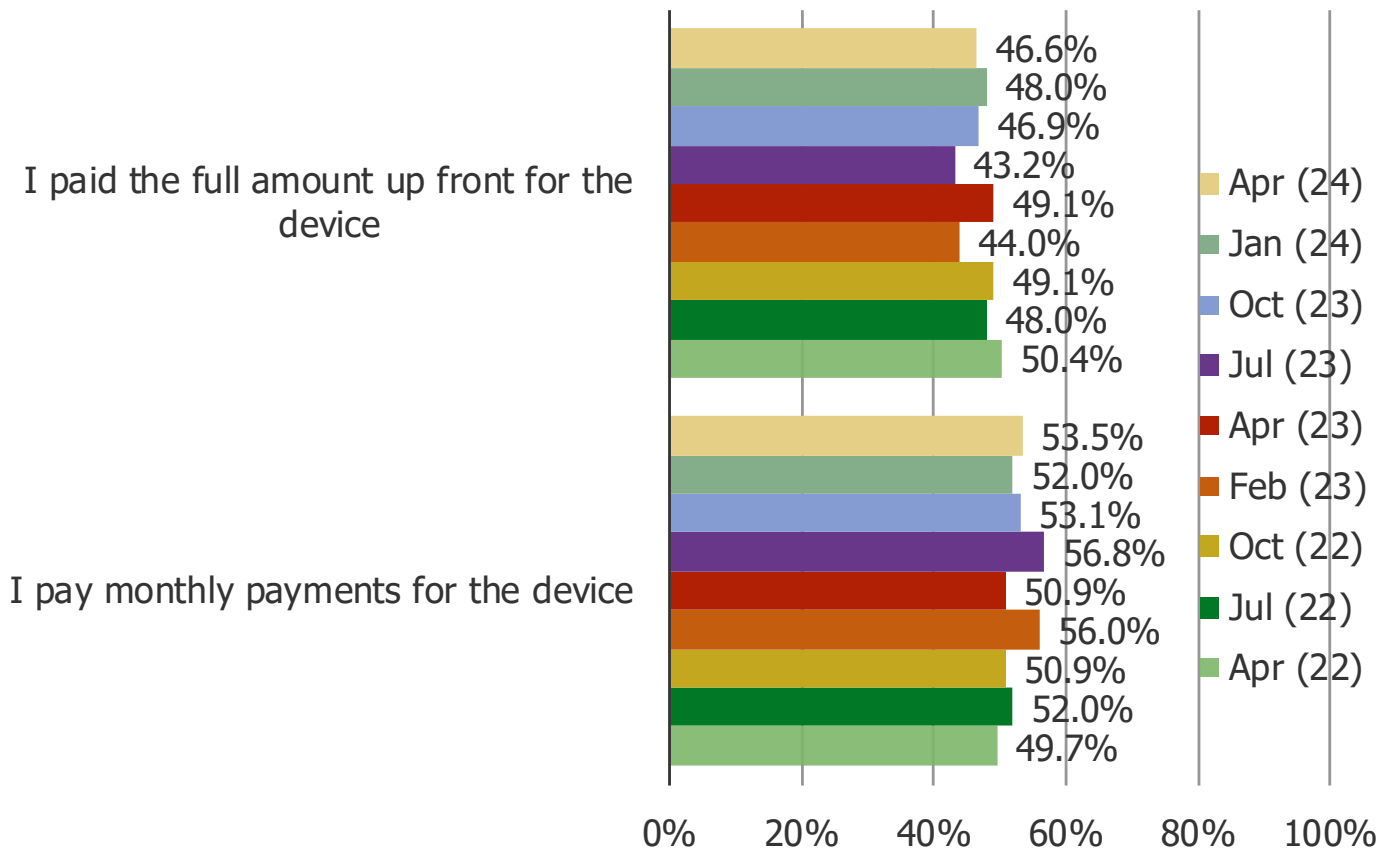
HOW DID YOU PURCHASE YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



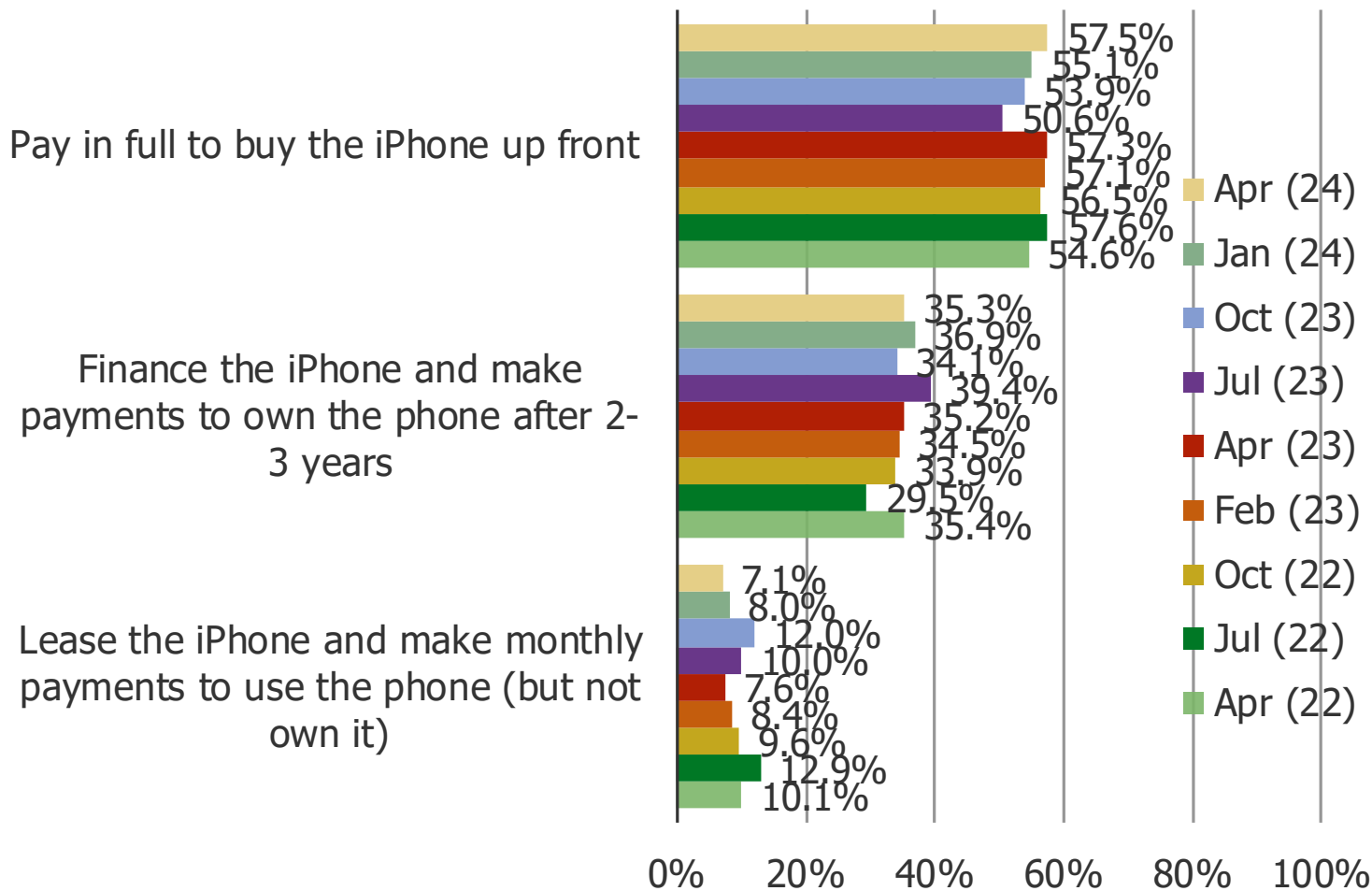
WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU PURCHASED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



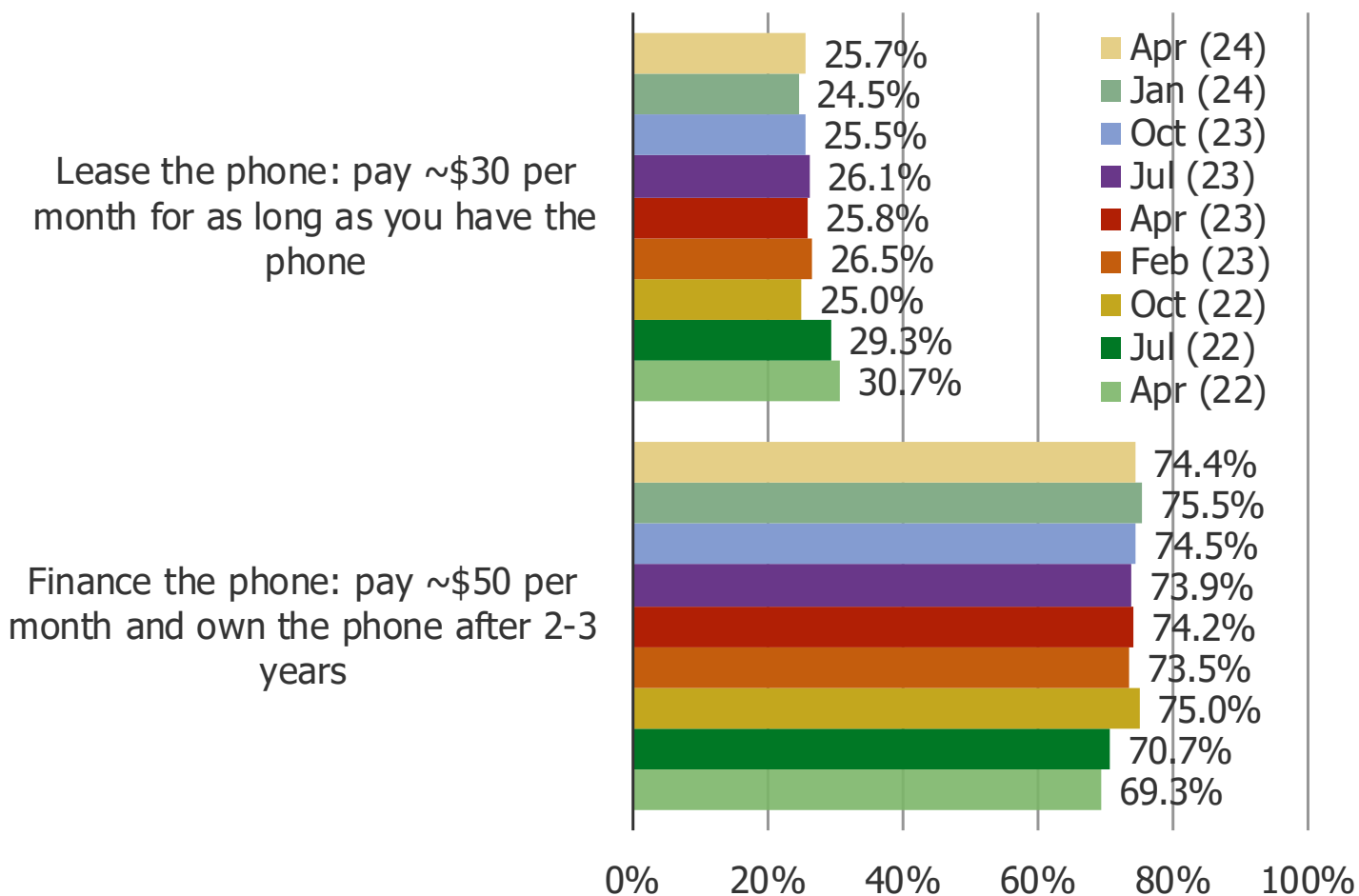
WHICH OF THE FOLLOWING DO YOU THINK WOULD BE A BETTER WAY TO HAVE AN IPHONE?

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?

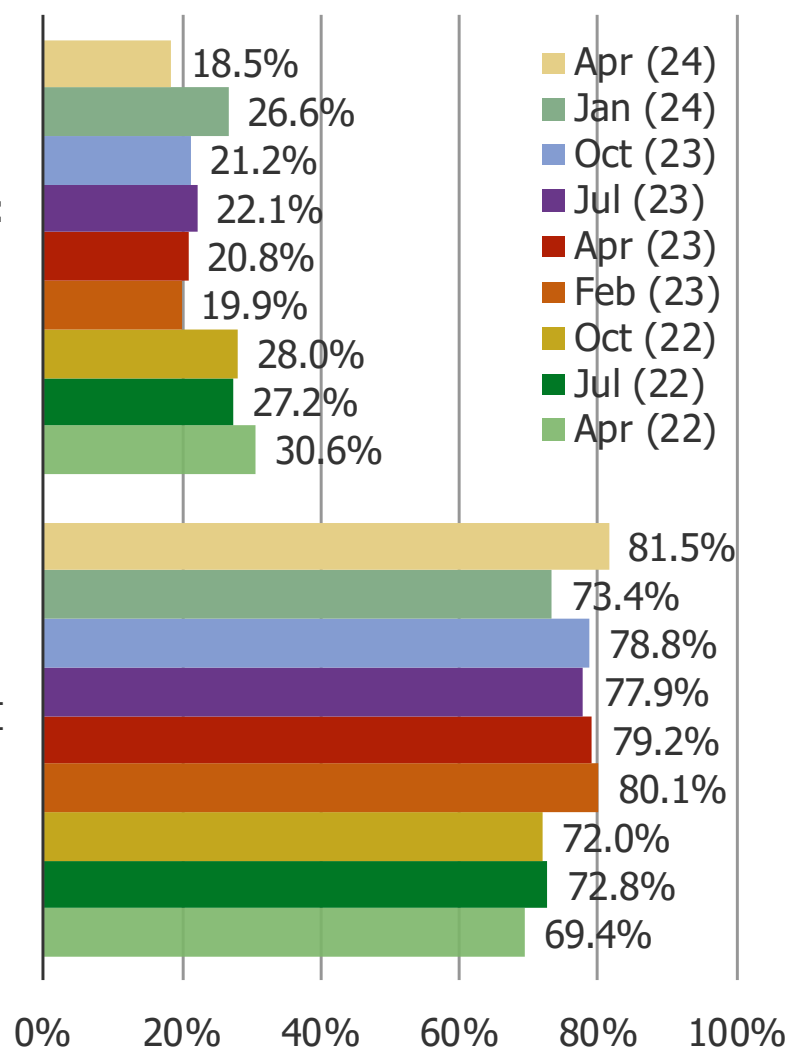
This question was posed to iPhone owners.



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.

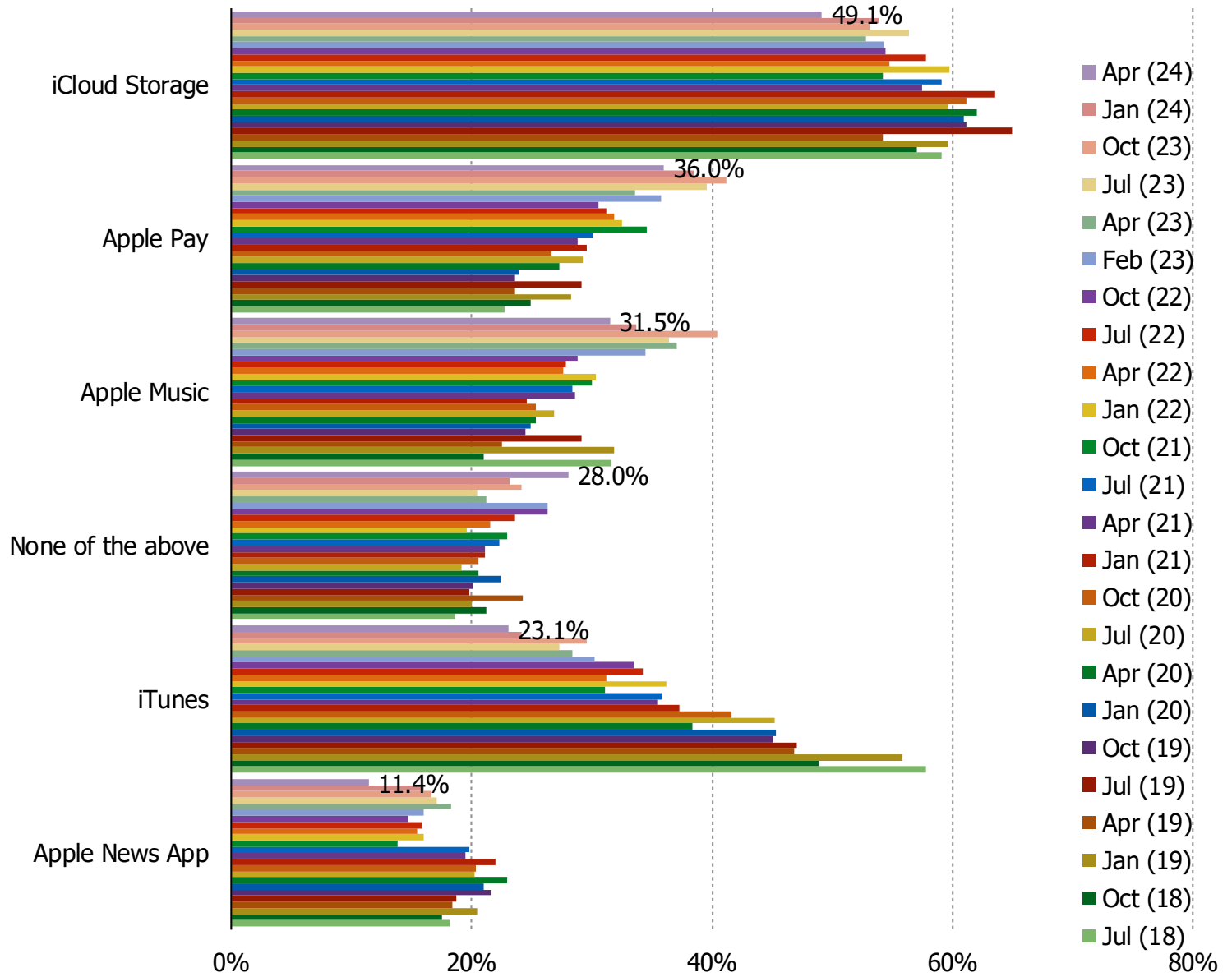
I would lease it at this dollar amount:
Please just enter the number, do not include the \$ symbol.



AAPL PAY QUESTIONS

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

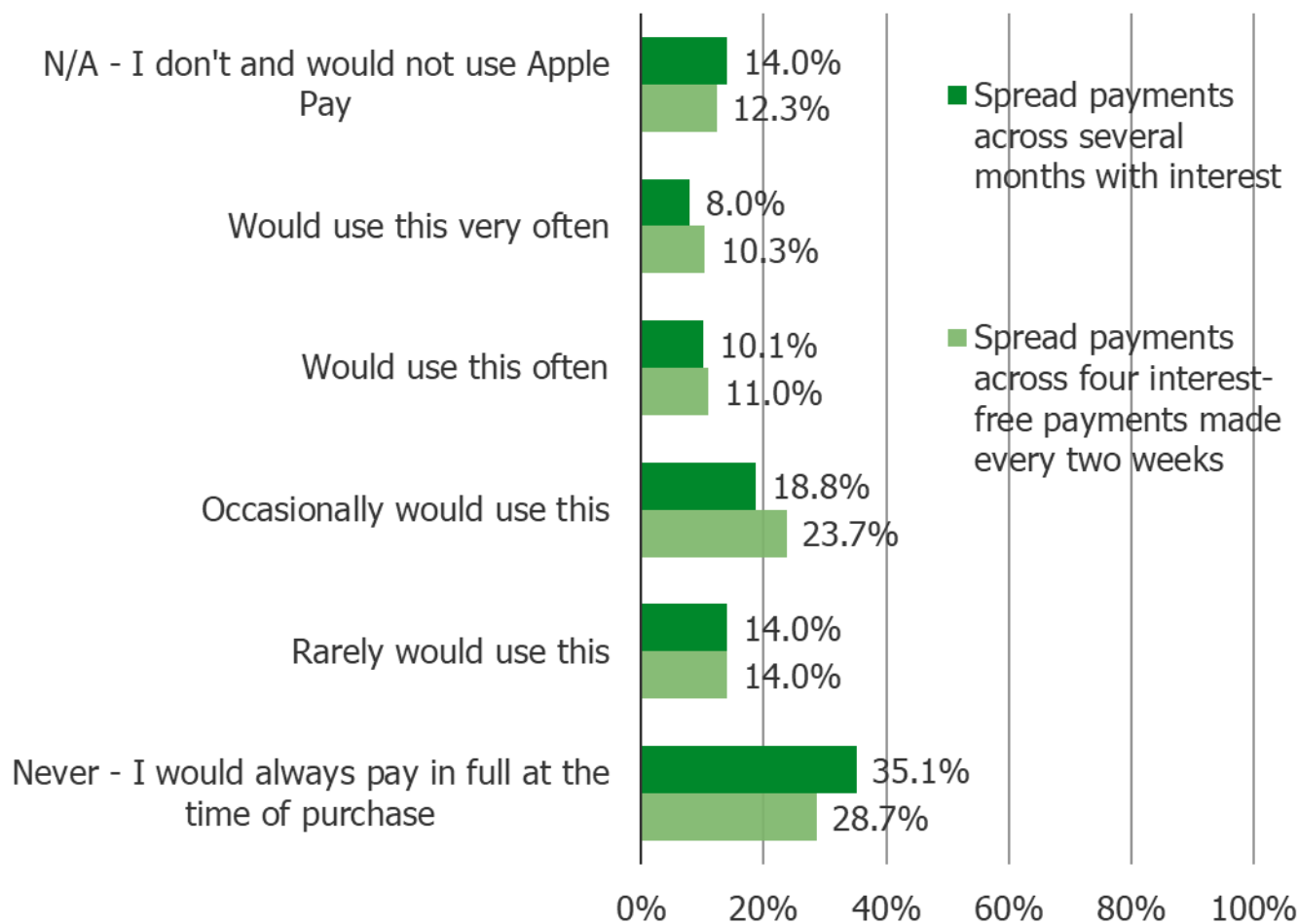
This question was posed to iPhone owners.



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?

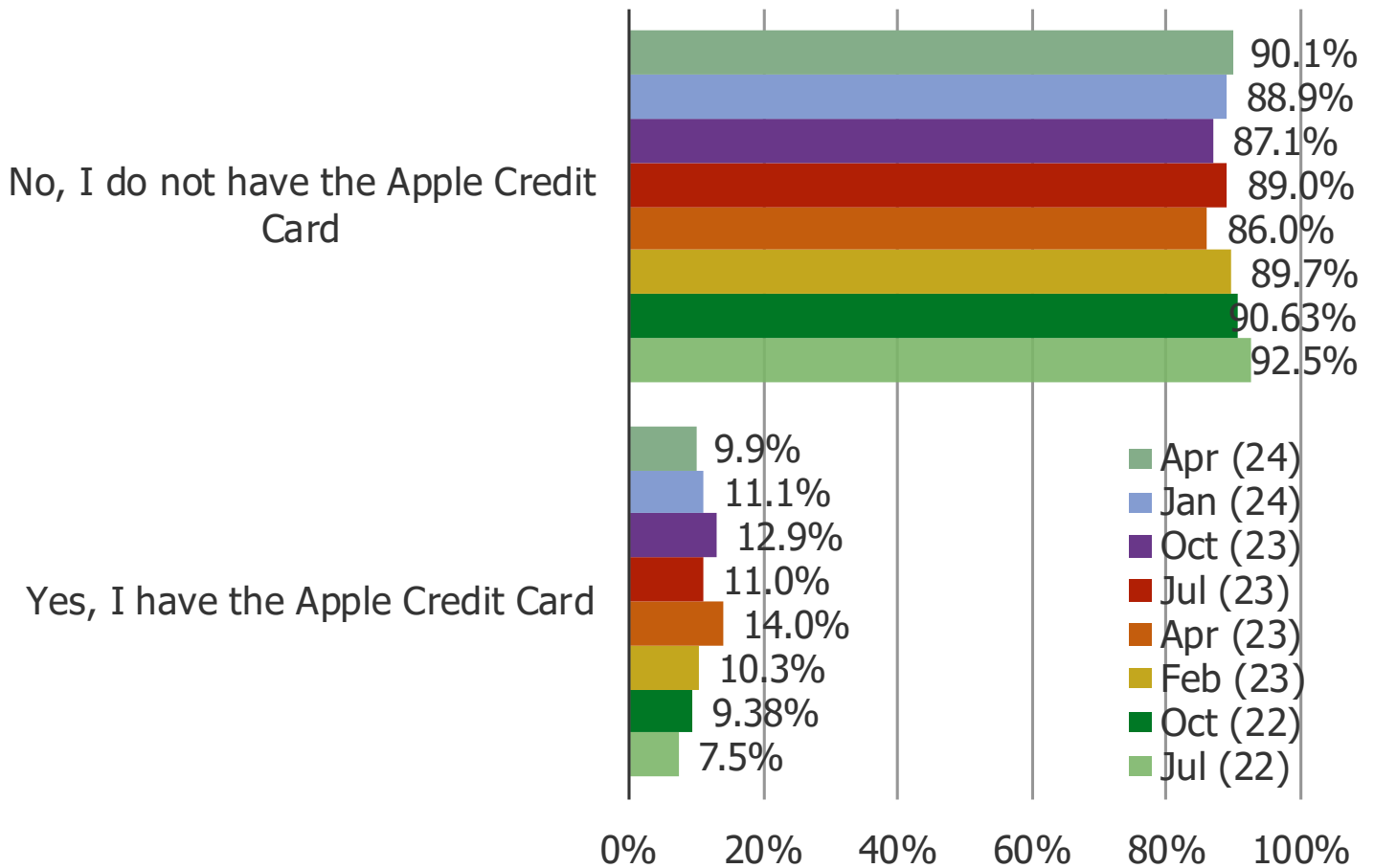
This question was posed to iPhone owners who use Apple Pay.

APRIL 2024



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

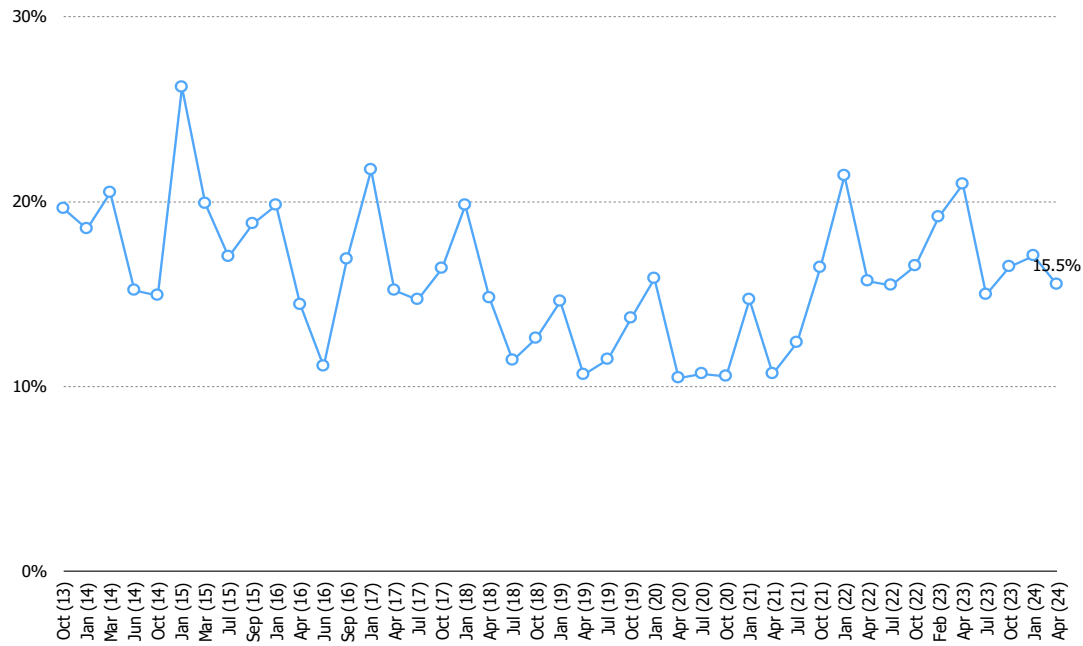
This question was posed to iPhone owners.



IPHONE DYNAMICS

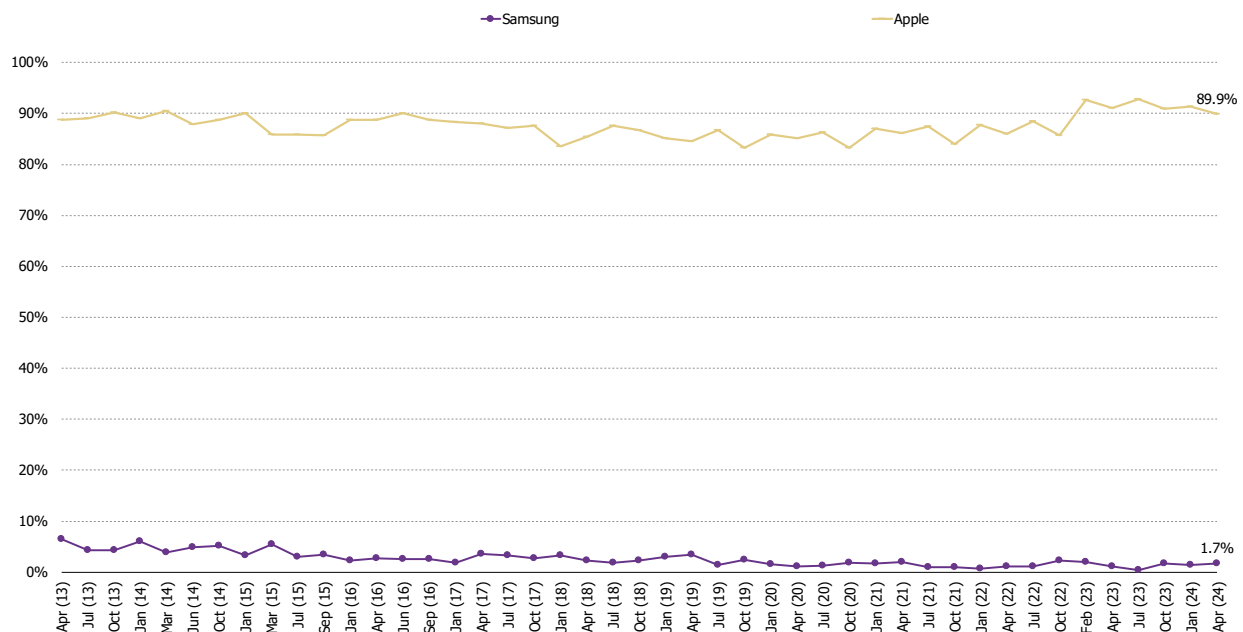
GOT IPHONE WITHIN PAST THREE MONTHS

This question was posed to iPhone owners.

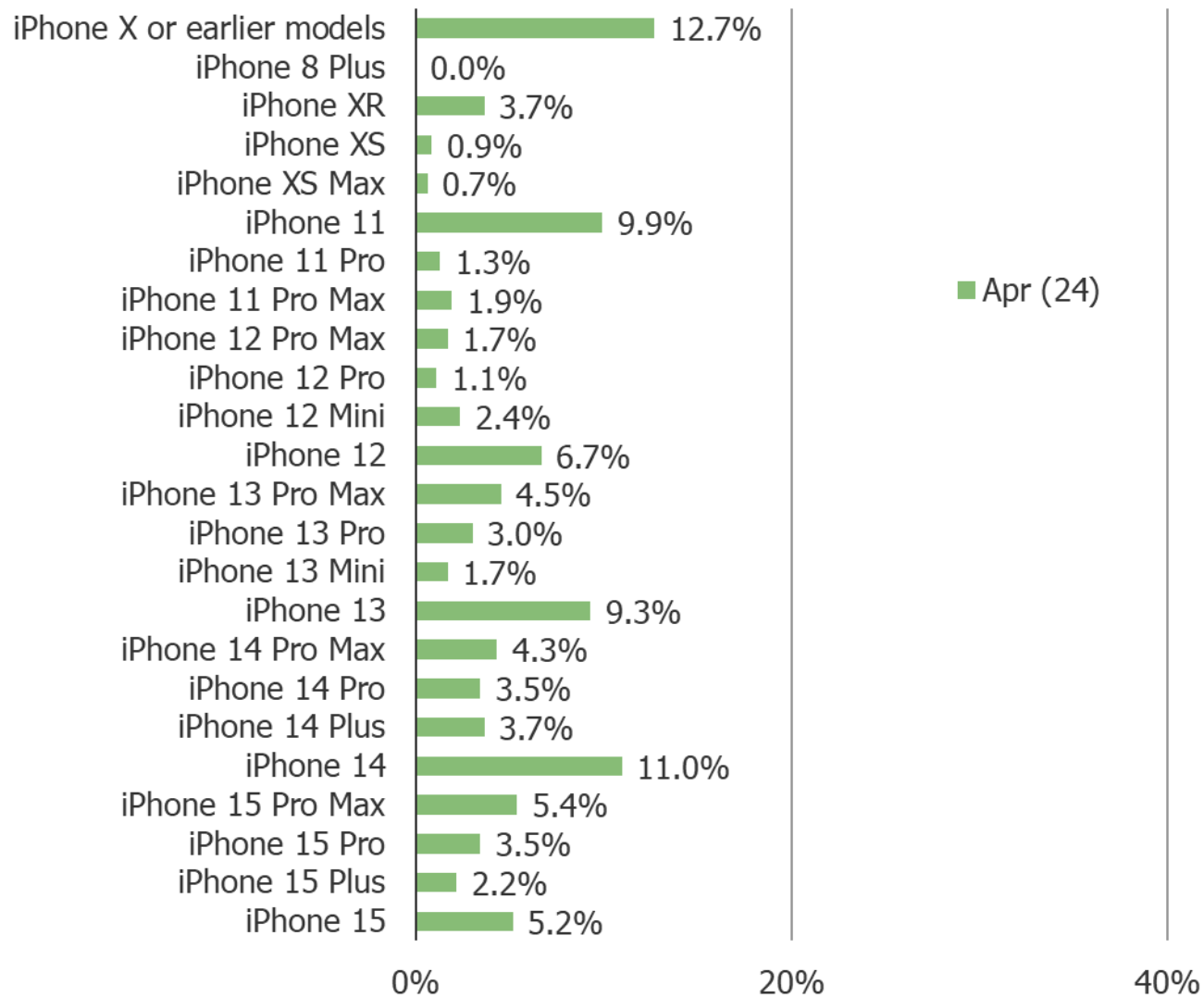


WHICH SMARTPHONE DO YOU PLAN TO GET NEXT?

This question was posed to iPhone owners.

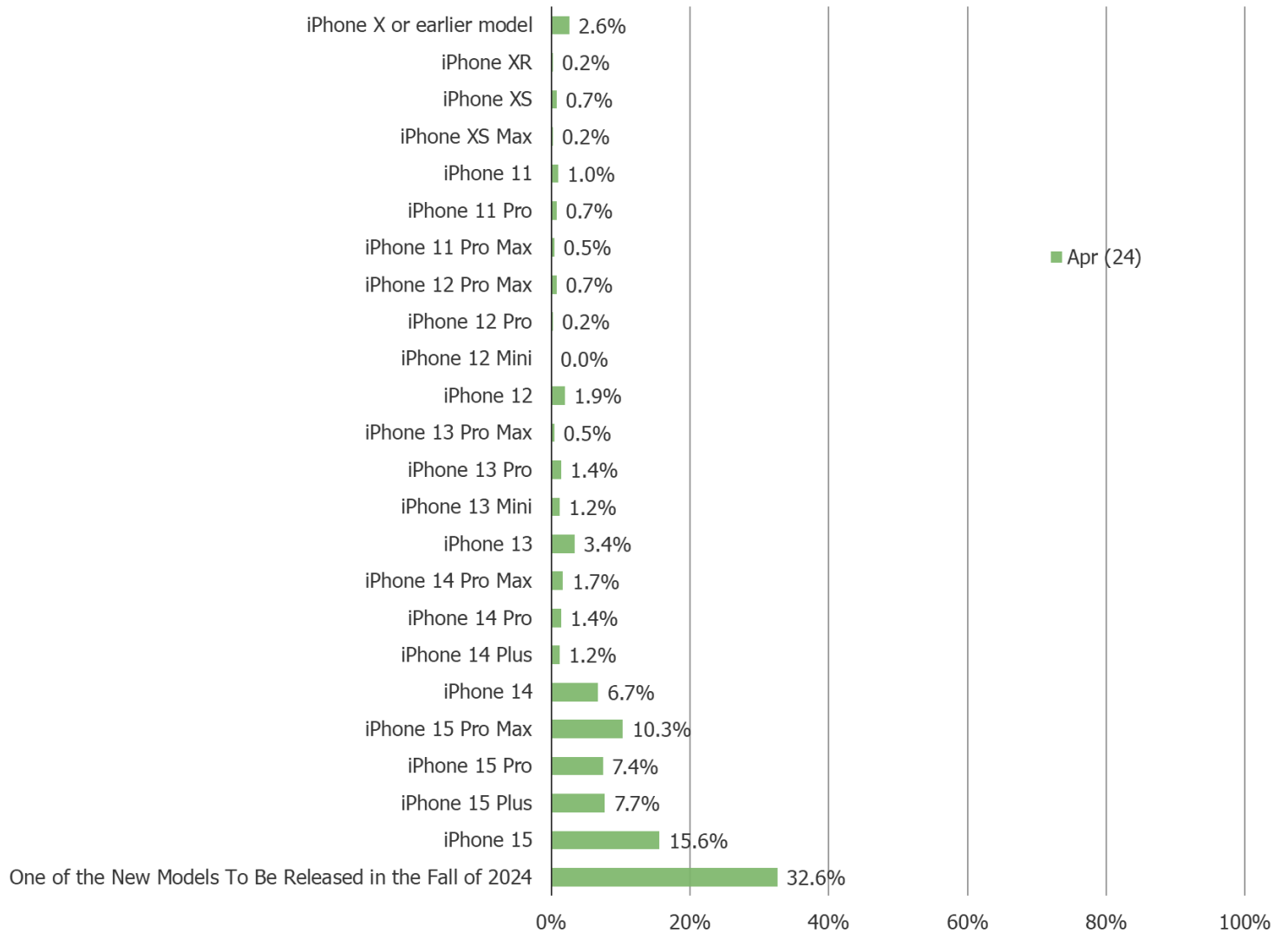


IPHONE MIX – WHICH MODEL DO YOU CURRENTLY OWN?



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?

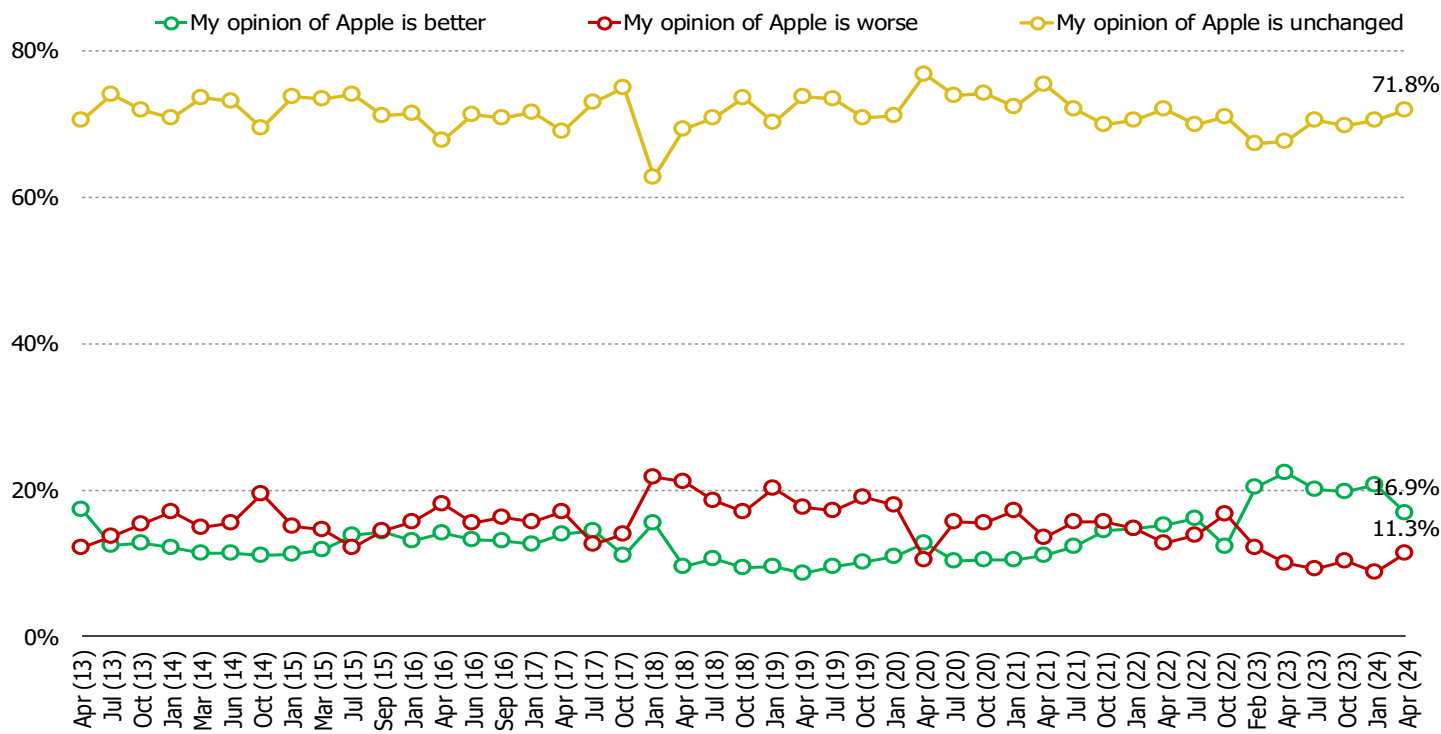
This question was posed to smartphone owners.



CONSUMER SENTIMENT

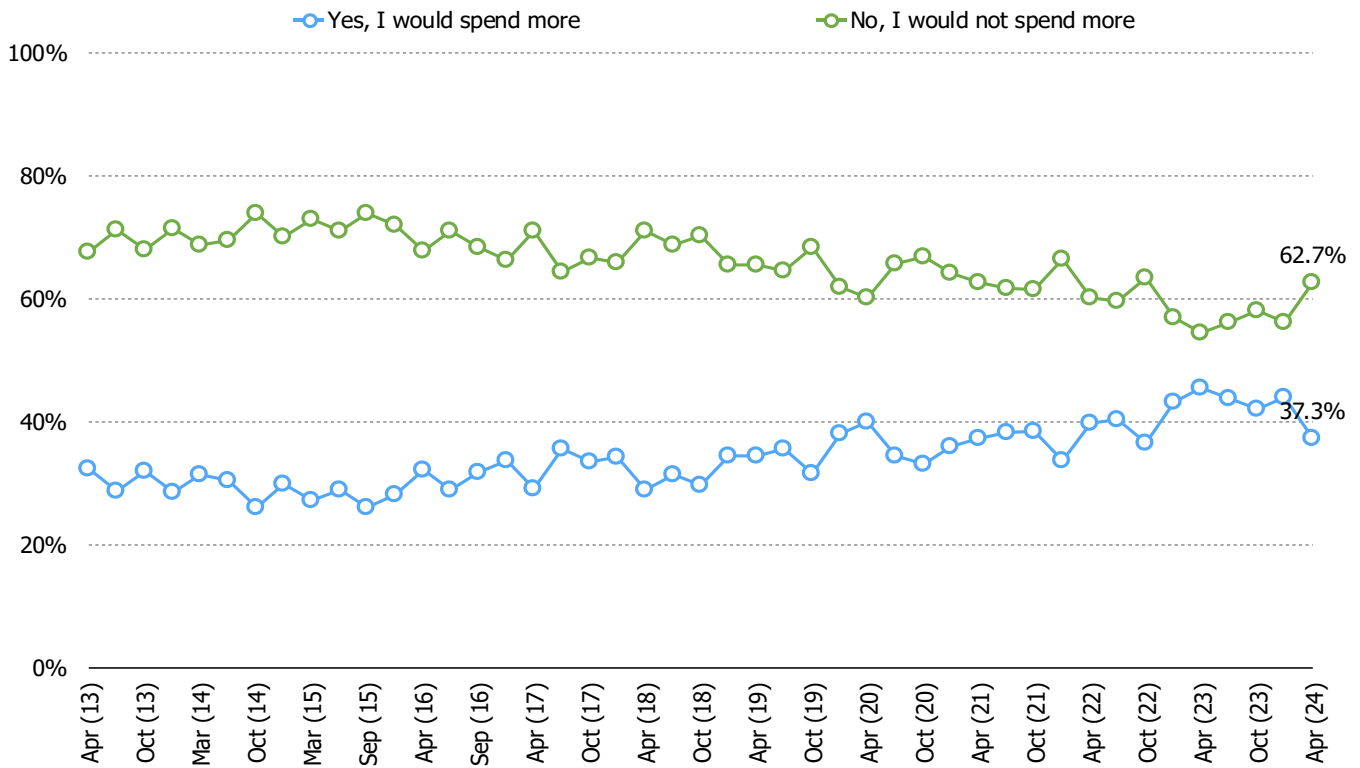
HAS YOUR OPINION OF APPLE CHANGED OVER THE PAST YEAR?

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?

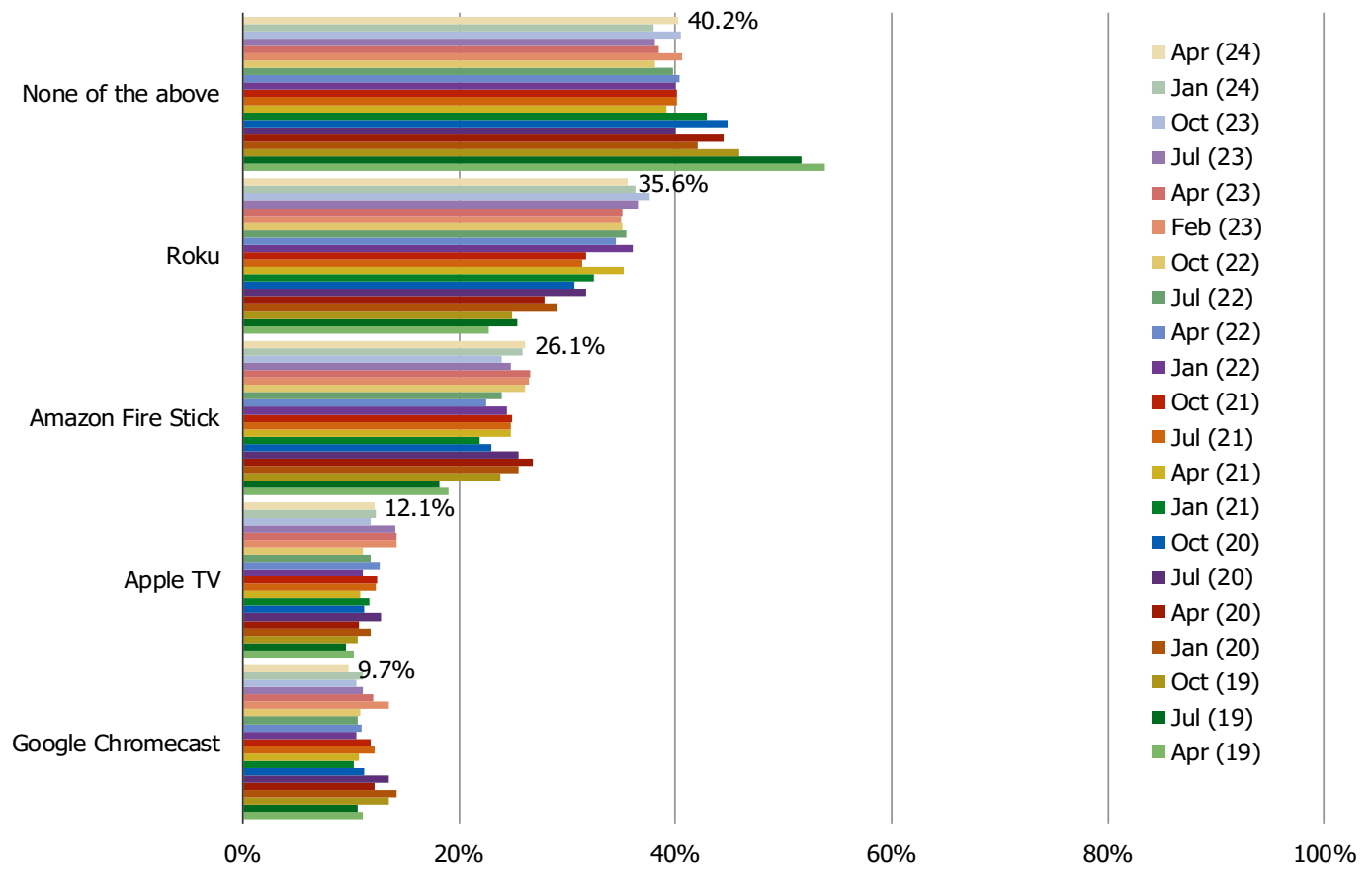
This question was posed to all respondents



STREAMING PLAYERS

DO YOU OWN ANY OF THE FOLLOWING STREAMING PLAYERS?

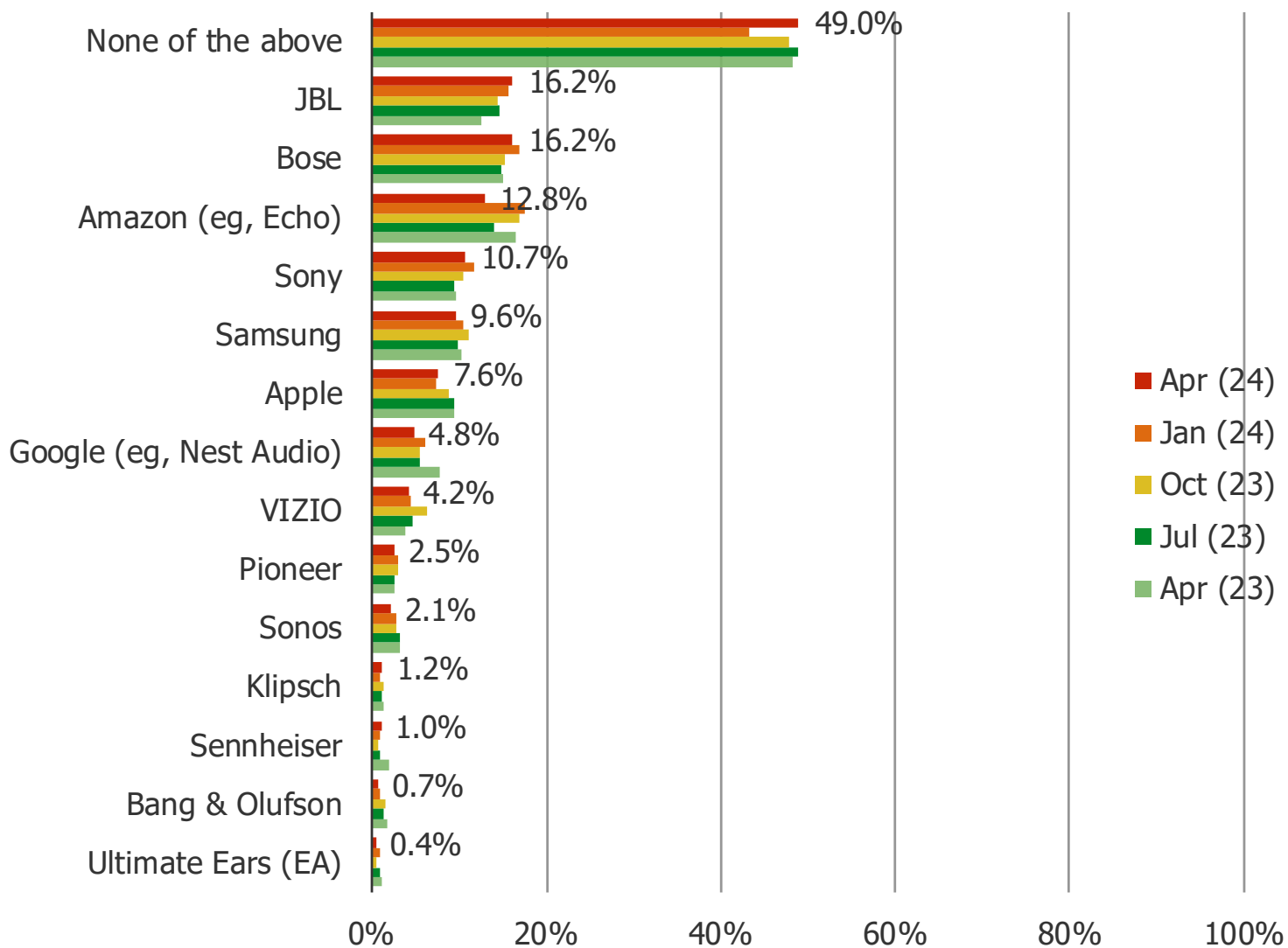
This question was posed to all consumers.



SPEAKERS AND SOUNDBARS

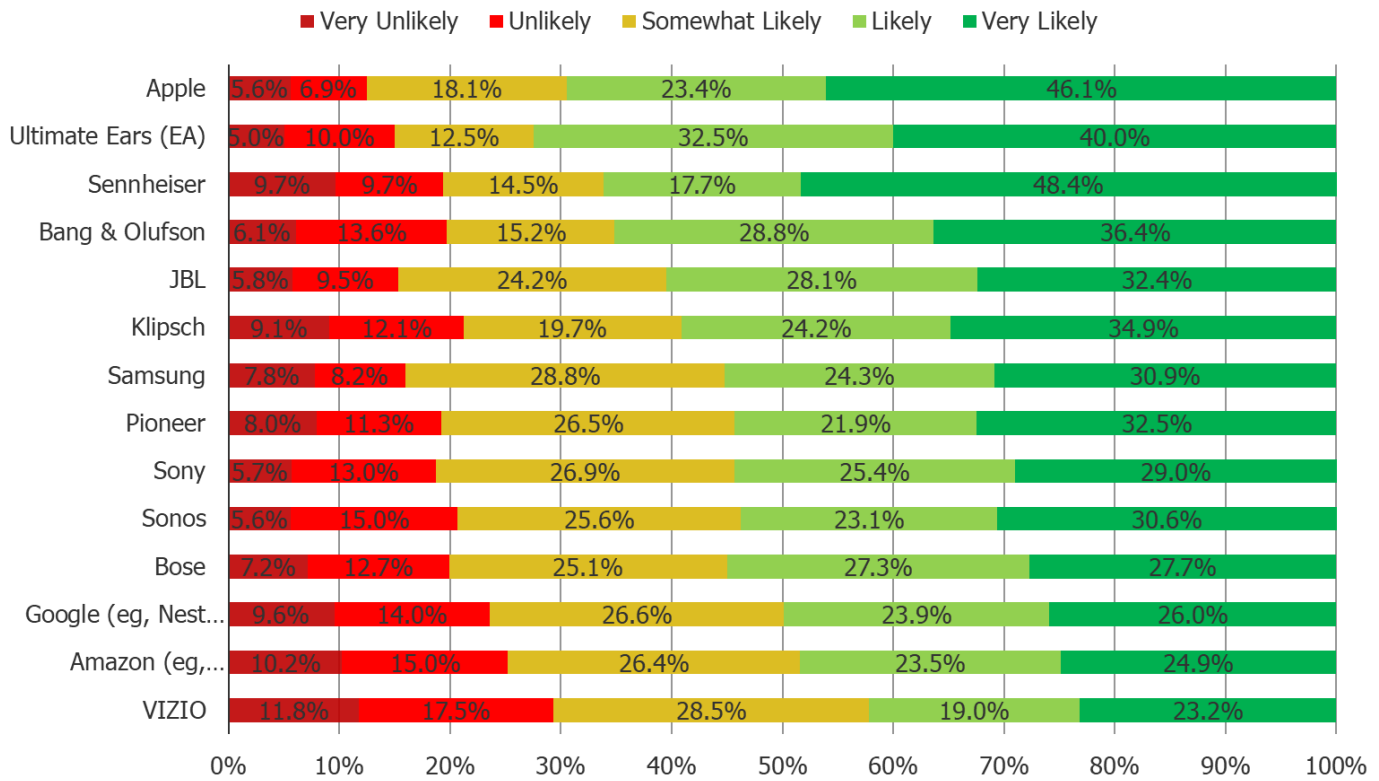
DO YOU OWN ONE OR MORE SPEAKERS FROM THE FOLLOWING BRANDS? SELECT ALL THAT APPLY

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.

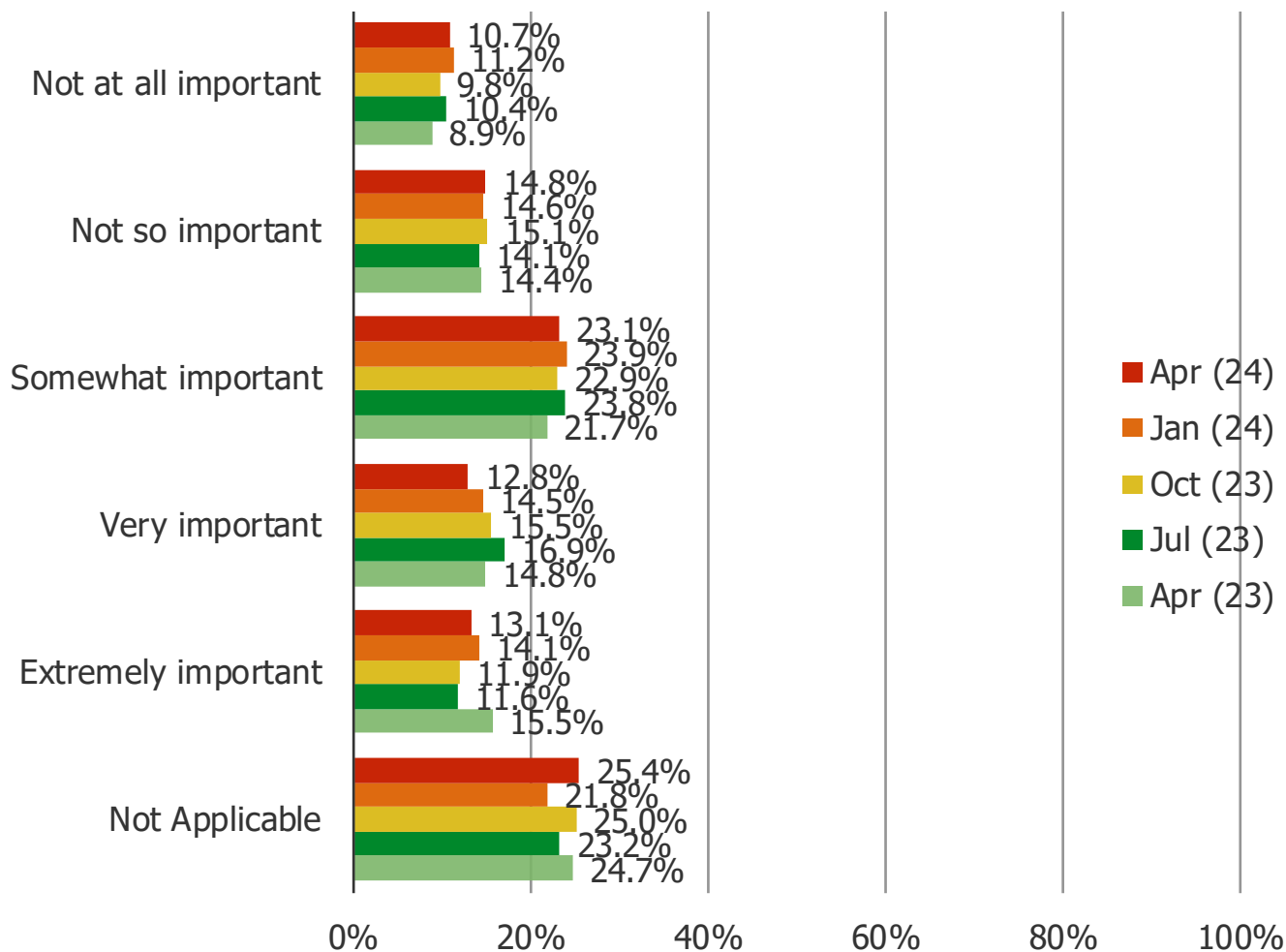


Combining past 5 waves to achieve larger N sizes...

	N =
VIZIO	263
Amazon (eg, Echo)	880
Google (eg, Nest Audio)	335
Bose	880
Sonos	160
Sony	583
Pioneer	151
Samsung	576
Klipsch	66
JBL	828
Bang & Olufson	66
Sennheiser	62
Ultimate Ears (EA)	40
Apple	482

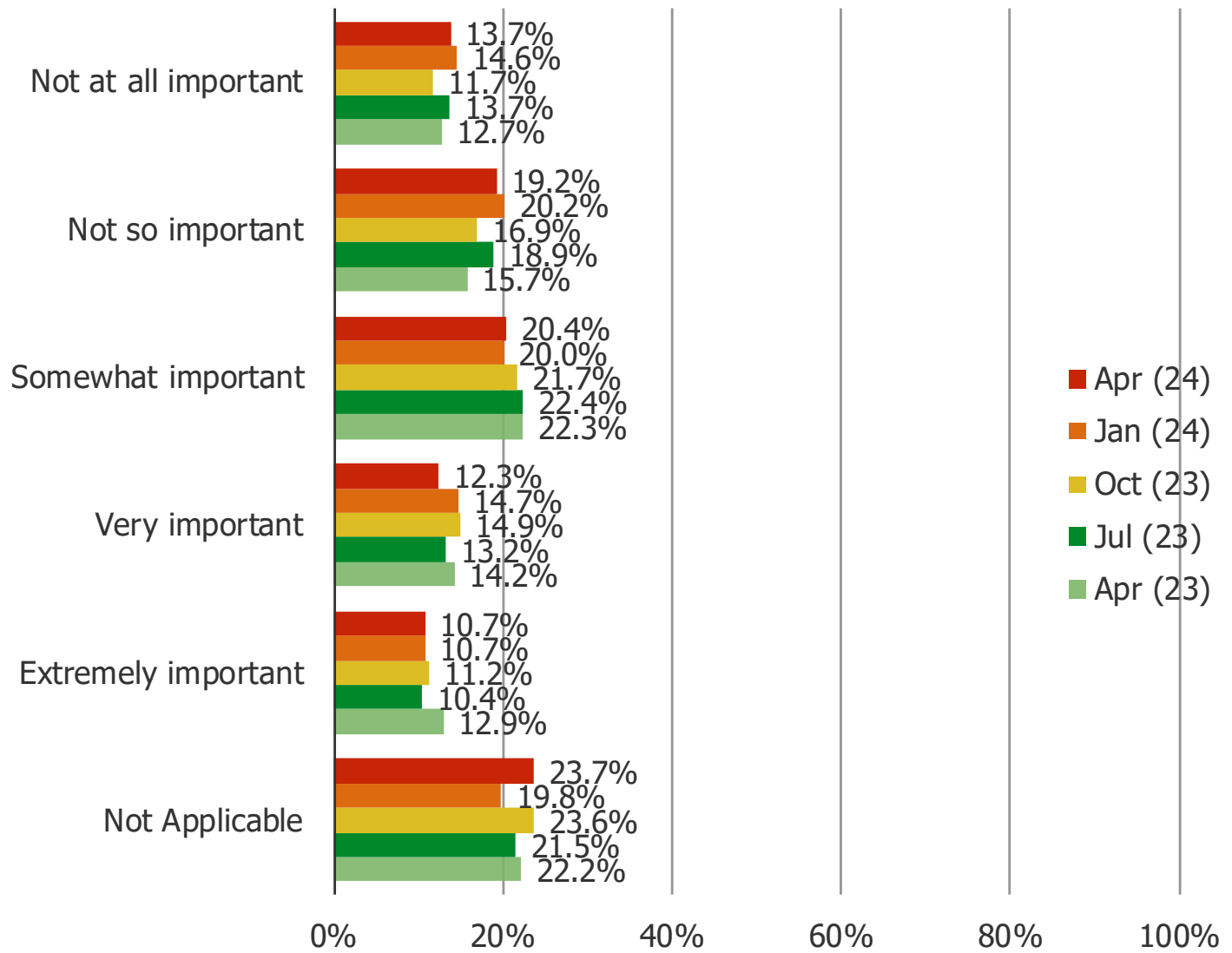
WHEN YOU BUY SPEAKERS, HOW IMPORTANT IS IT TO YOU THAT IT HAS MULTI-ROOM/MULTI-SPEAKER CONNECTIVITY? (IE A SPEAKER THAT HAS CONNECTIVITY TO OTHER SPEAKERS TO PLAY THE SAME SONG/AUDIO AT THE SAME TIME ACROSS SPEAKERS THROUGHOUT THE HOUSE)?

This question was posed to all respondents.



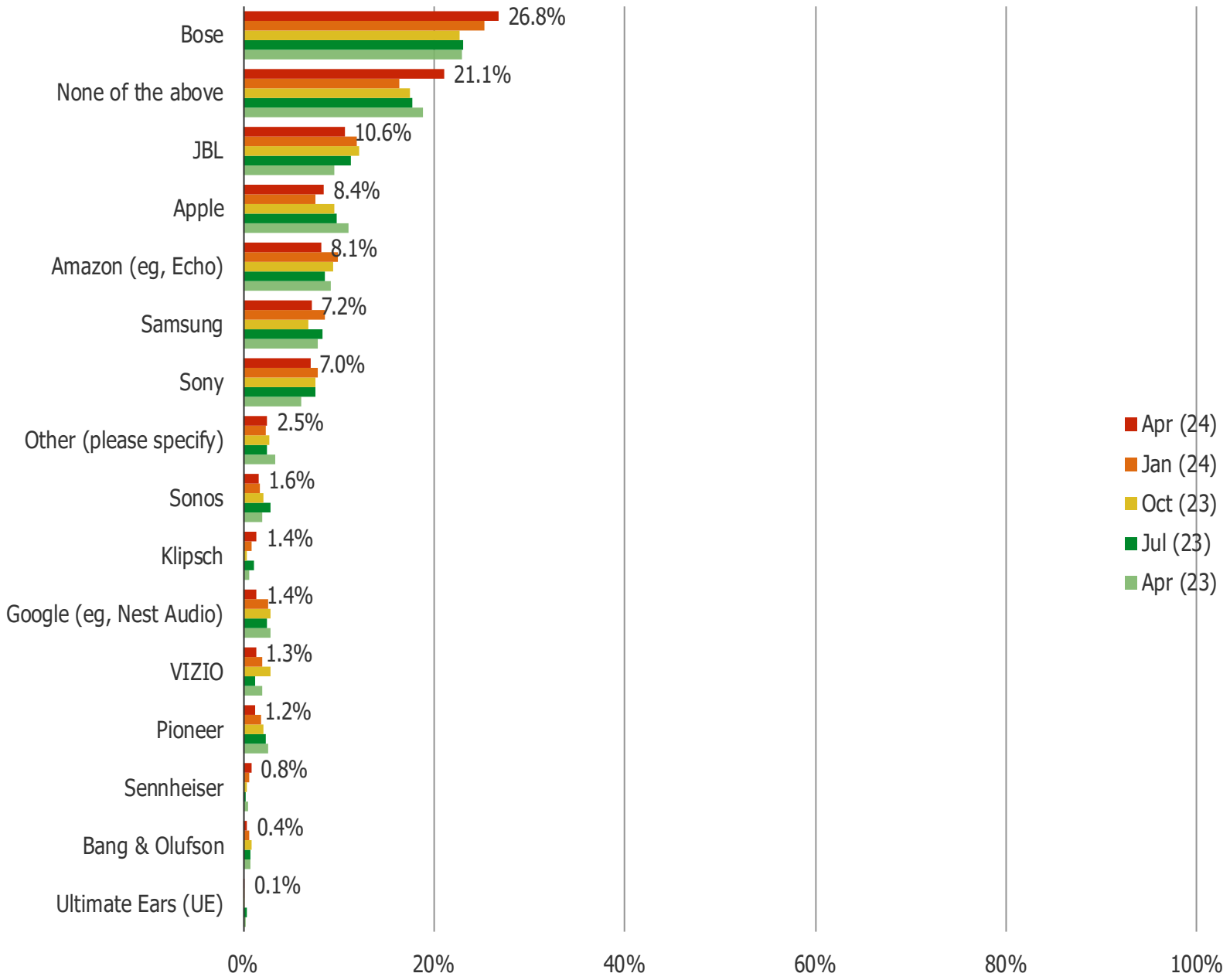
HOW IMPORTANT IS IT TO YOU TO USE ONE SINGLE BRAND OF SPEAKERS THROUGHOUT YOUR HOME?

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.

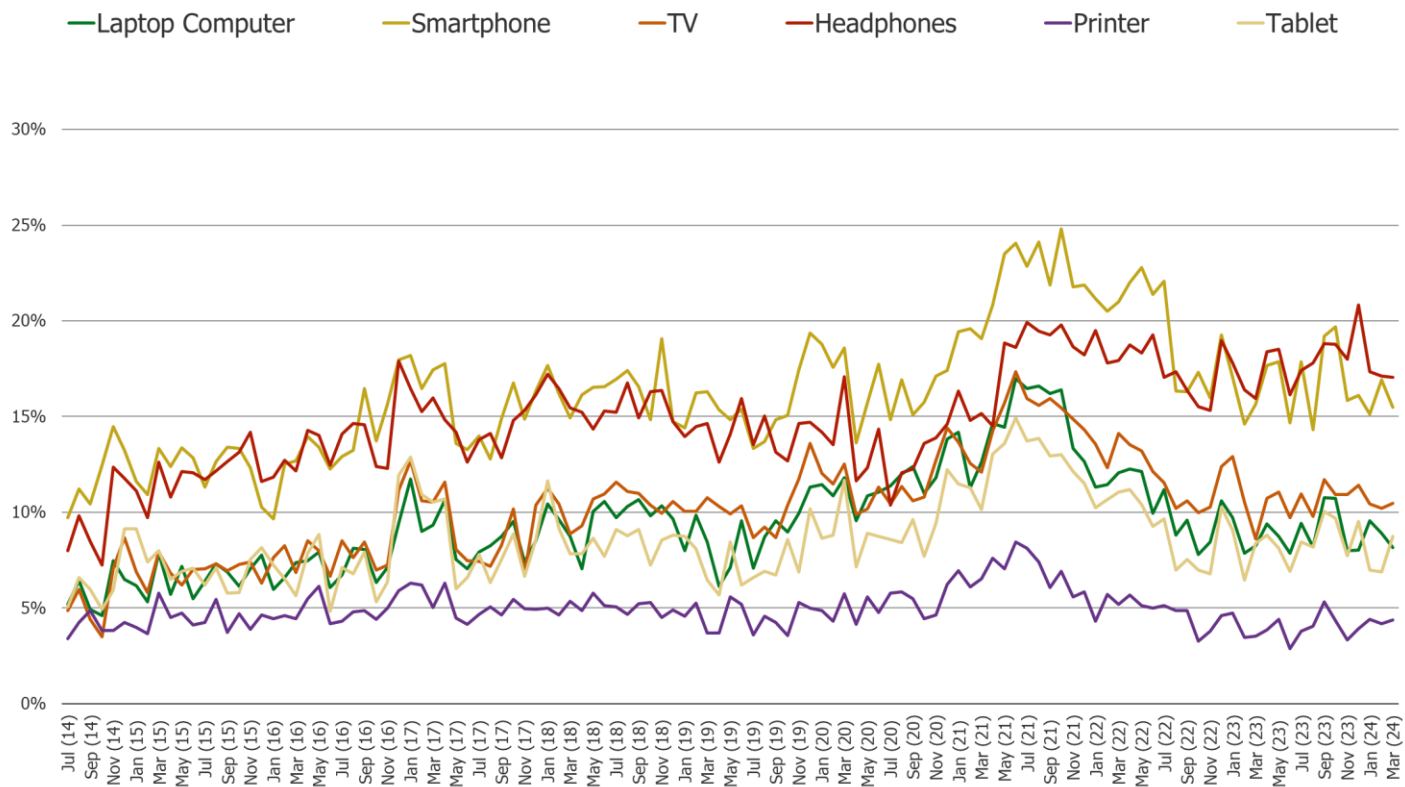


MONTHLY DATA

CONSUMER ELECTRONICS ENGAGEMENT

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

This question was posed to all respondents.



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

This question was posed to all respondents.

