

Bespoke Survey Research

October 2024

Consumer Electronics China

Volume 38 | Quarterly Survey

1,000 China Consumers (**Audience Skews Urban/Larger Cities, and increasingly toward Tier 1 Cities**)

Tickers Covered: AAPL

KPIs and Key Questions

IMPORTANT DEMOGRAPHICS NOTE – TIER 1 CITIES

Over the past few years, the share of respondents coming from tier 1 cities has increased and the share coming from tier 2 cities has declined by a similar amount. The share of respondents coming from tier 3 through tier 6 cities has been generally consistent in our survey.

IPHONE SHARE

iPhone share trends were flat q/q. It has declined in recent quarters in our tracker following a period of time in which it made steady gains. Consumers project share gains for Apple over upgrade cycles going forward.

REASONS FOR NOT HAVING AN IPHONE

Price/cost remains one of the most mentioned reasons why Chinese consumers don't own an iPhone. We also hear from people that they want to support domestic production and that they are used to Android.

REFRESH CYCLES

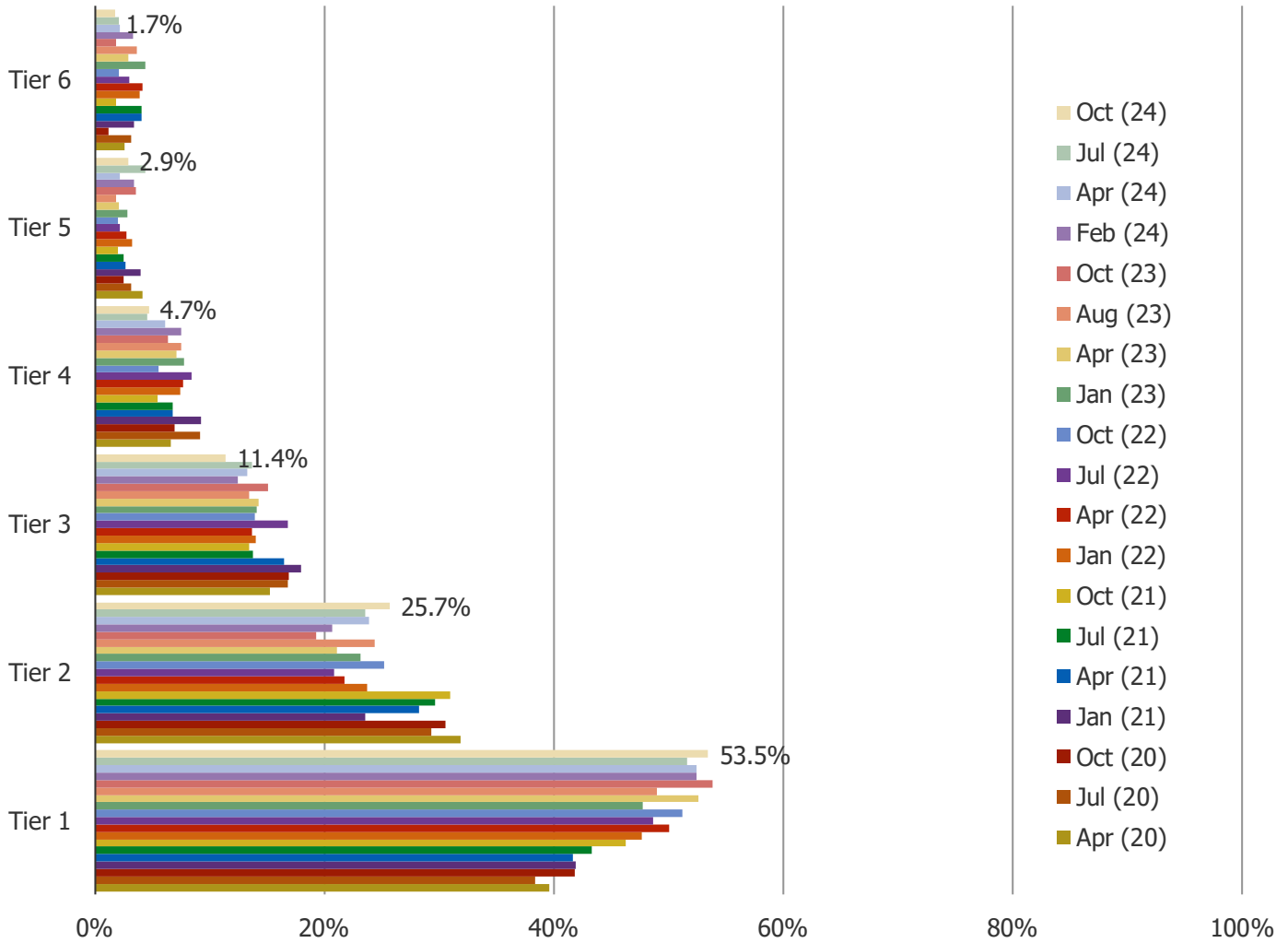
Refresh cycles are improving slightly sequentially.

Noteworthy Stats:

- 10.7%** Of respondents said that they think that domestic demand for the iPhone has significantly strengthened.
- 9.0%** Of respondents said that they think that domestic demand for the iPhone has significantly weakened.
- 47.3%** Of iPhone owners said they have higher expectations than normal for the latest iPhones.
- 20.1%** Of iPhone owners said they have lower expectations than normal for the latest iPhones.

WHICH OF THE FOLLOWING BEST DESCRIBES THE CITY YOU LIVE IN?

This question was posed to all respondents.

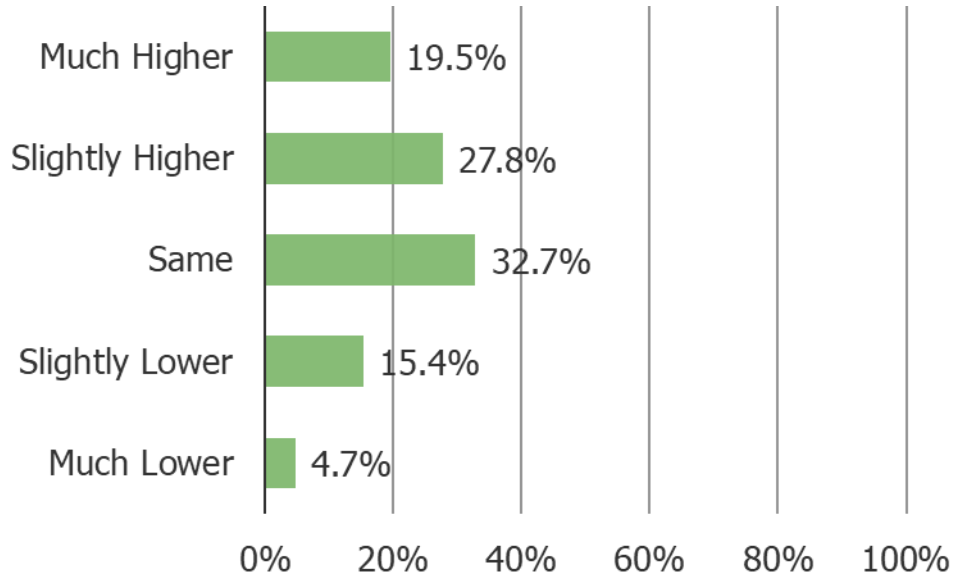


Apple vs. Android Overseas

NEW QUESTIONS

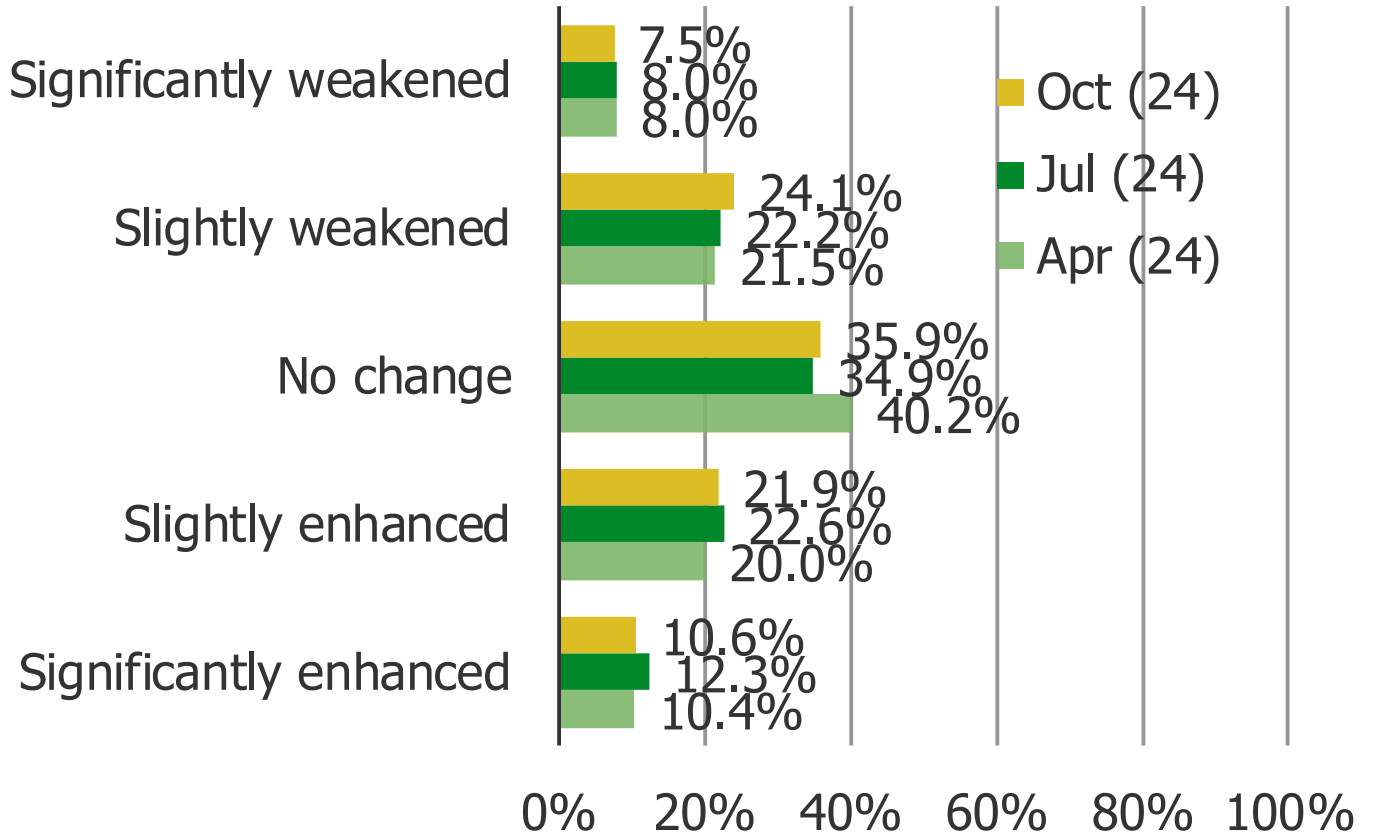
COMPARED WITH THE PREVIOUS IPHONE RELEASE, DO YOU HAVE HIGHER OR LOWER EXPECTATIONS FOR IPHONE 16, IPHONE 16 PLUS, IPHONE 16 PRO AND IPHONE 16 PRO MAX?

This question was posed to iPhone owners (N = 508)



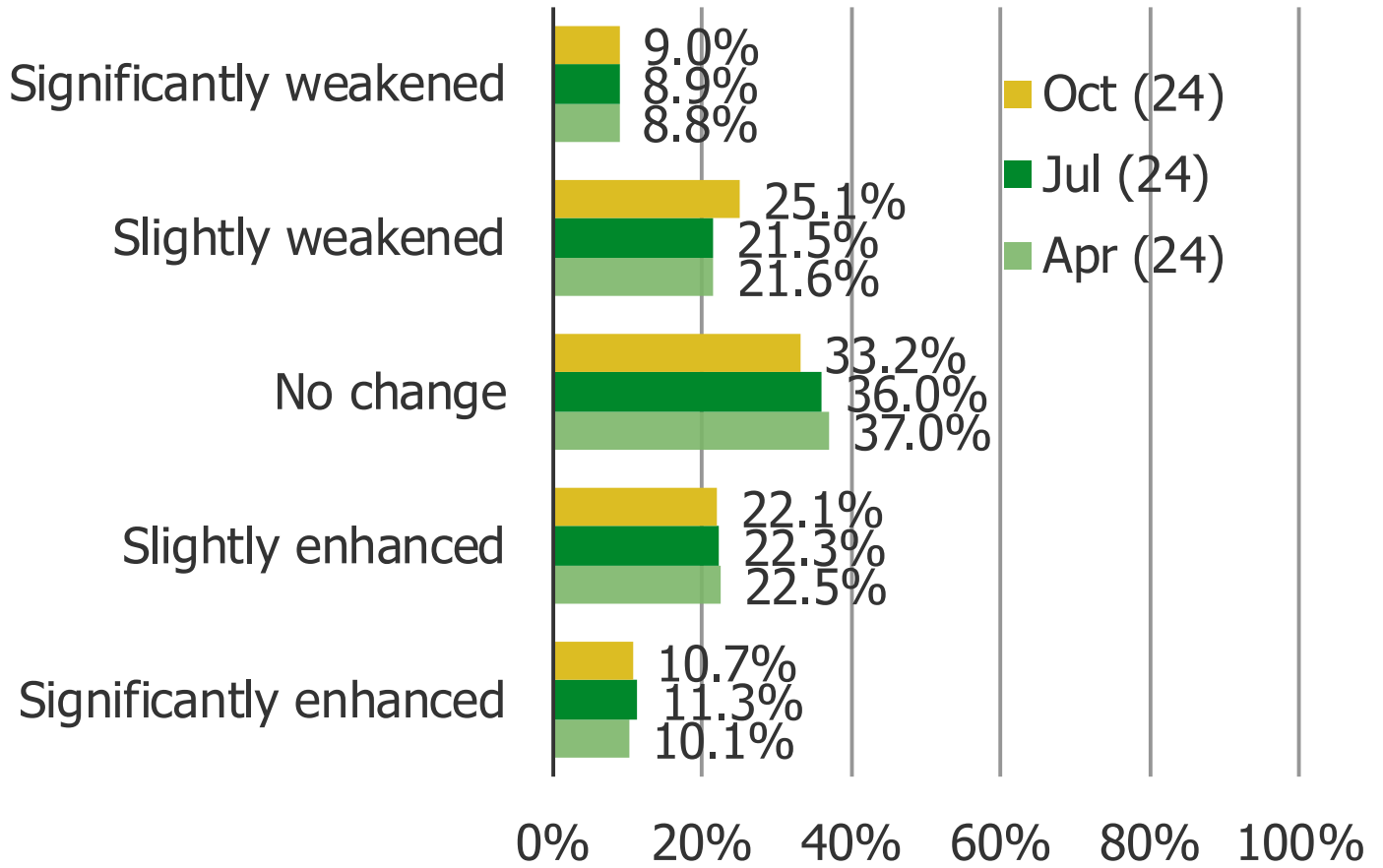
DO YOU THINK THE DEMAND FOR APPLE PRODUCTS IN YOUR COUNTRY HAS BECOME STRONGER OR WEAKER?

This question was posed to all respondents.



DO YOU THINK YOUR DOMESTIC DEMAND FOR APPLE'S IPHONE HAS BECOME STRONGER OR WEAKER?

This question was posed to all respondents.

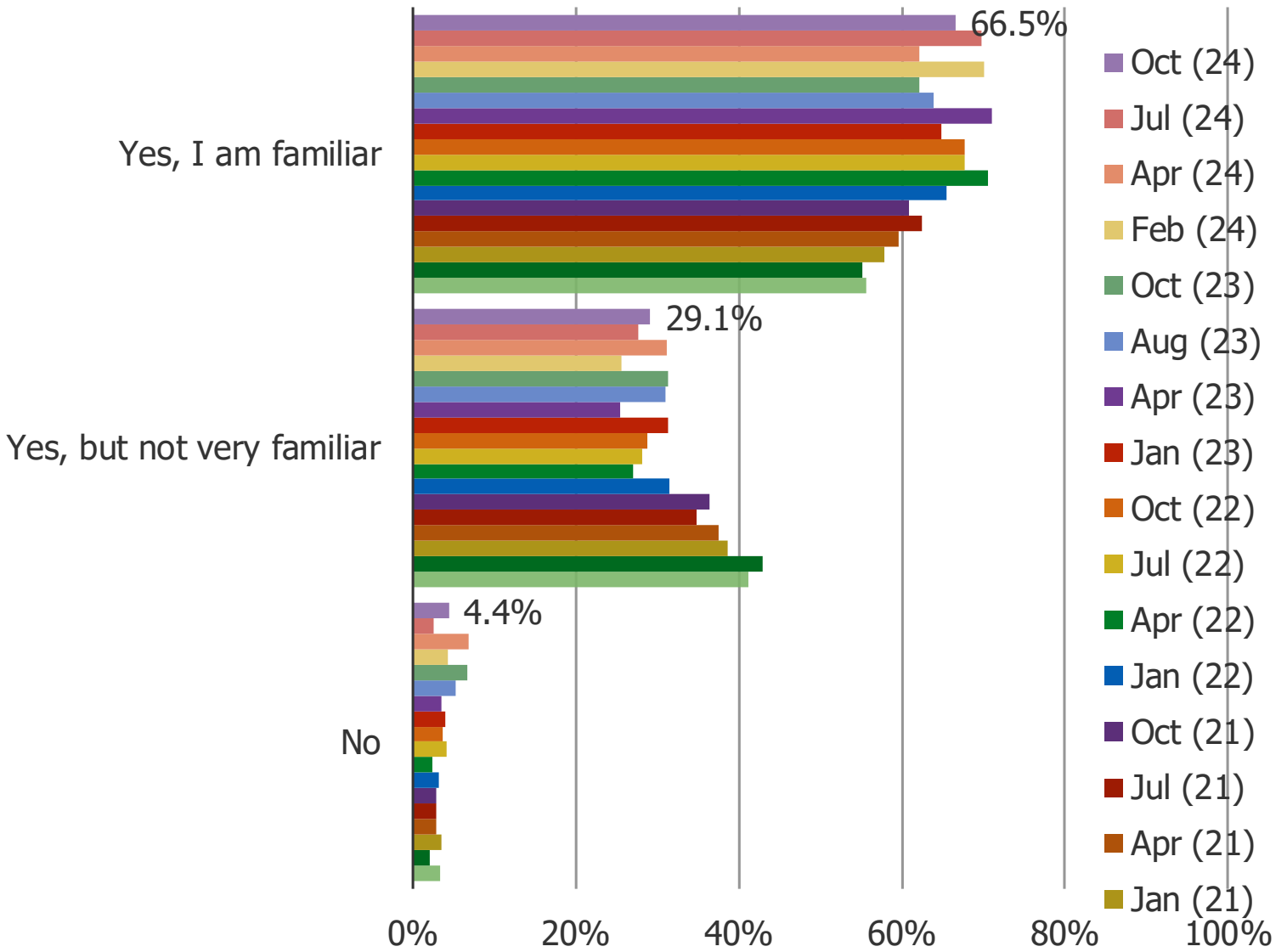


Apple vs. Android Overseas

5G

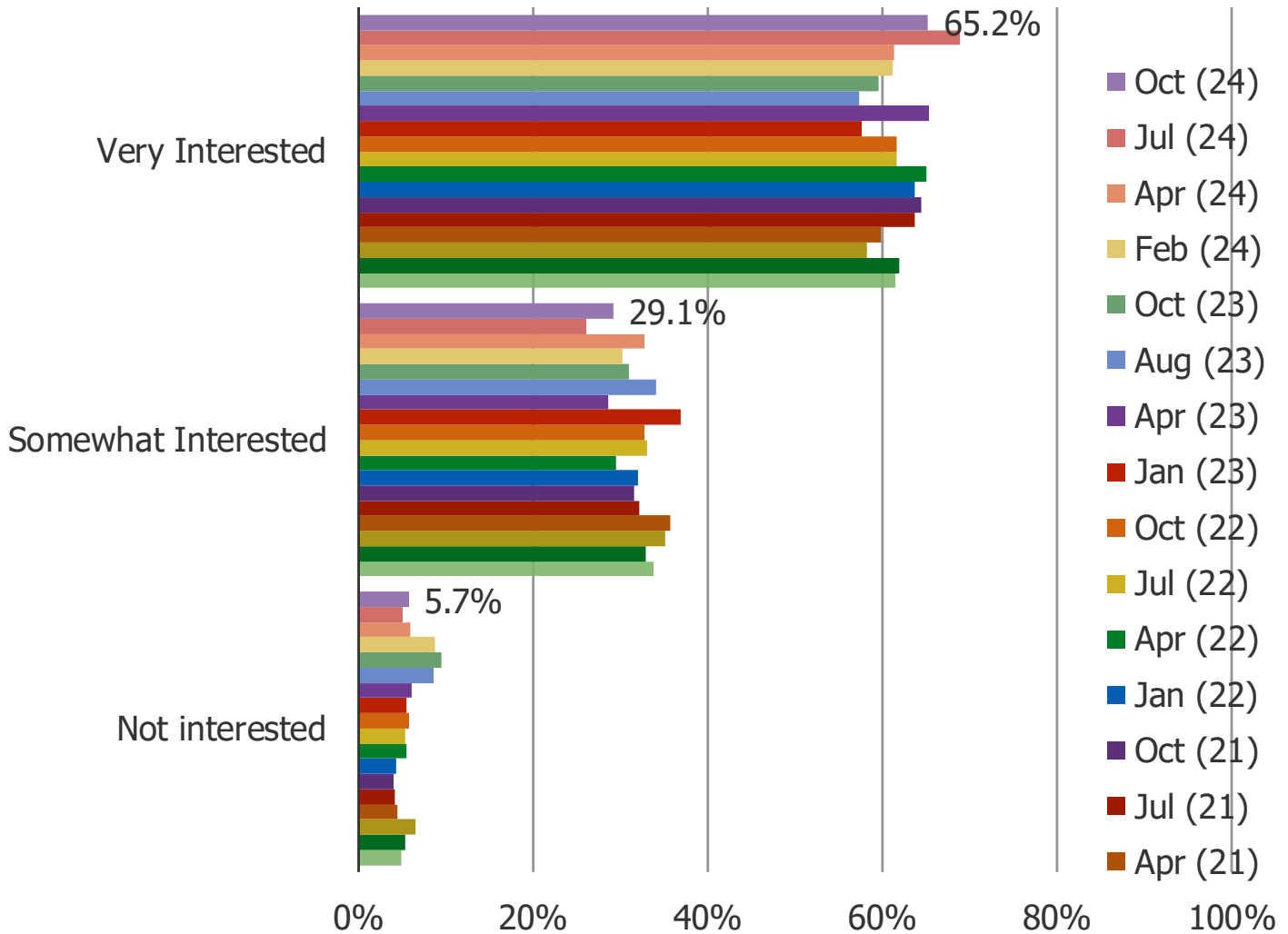
DO YOU KNOW WHAT 5G WIRELESS SERVICE IS?

This question was posed to all respondents.



HOW INTERESTED ARE YOU IN GETTING A PHONE THAT YOU CAN USE ON A 5G WIRELESS NETWORK?

This question was posed to all respondents.

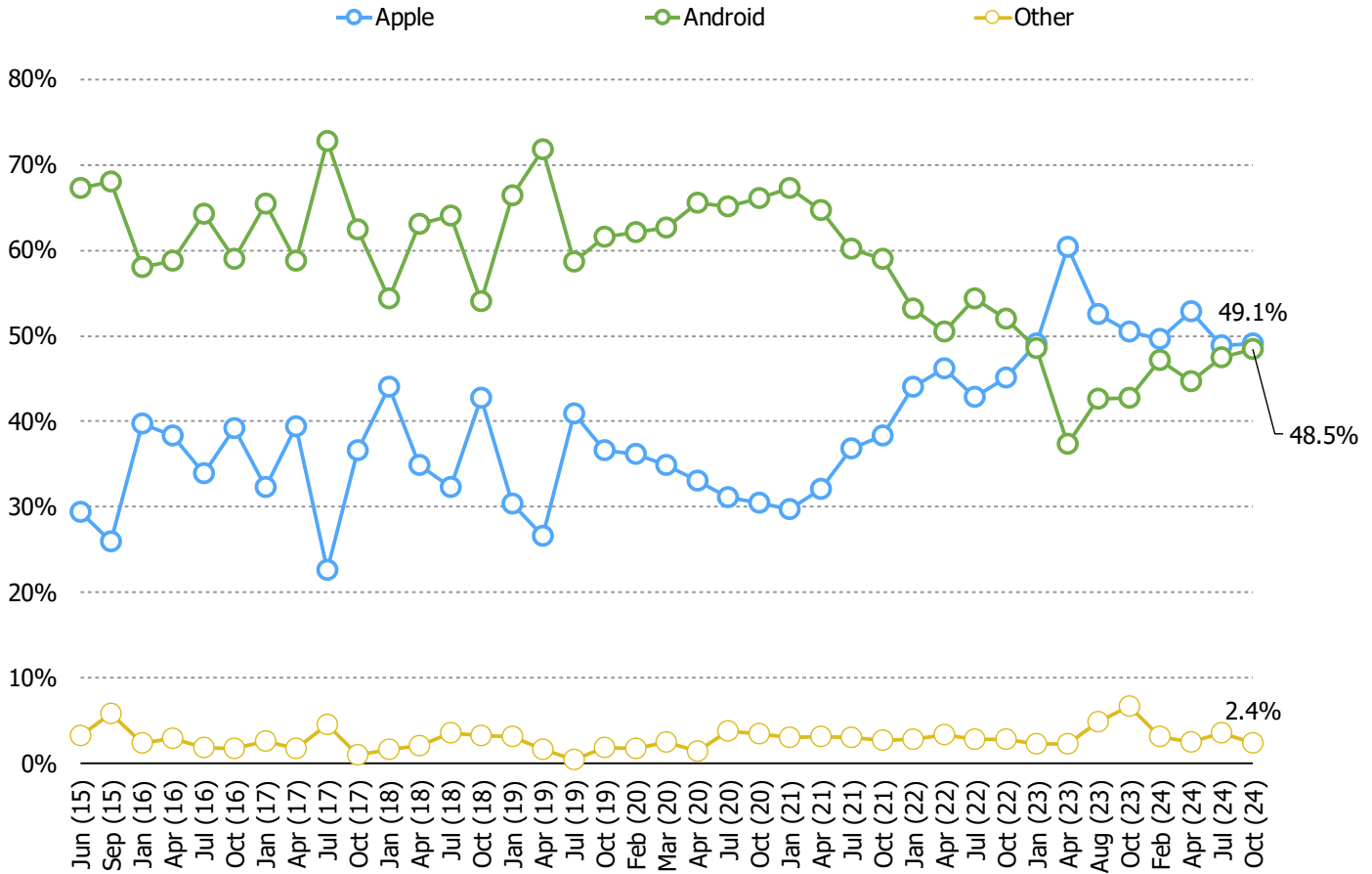


Apple vs. Android Overseas

MARKET SHARE TRENDS AND PURCHASE ENGAGEMENT

SMARTPHONE OWNERS – TYPE OF SMARTPHONE CURRENTLY OWN

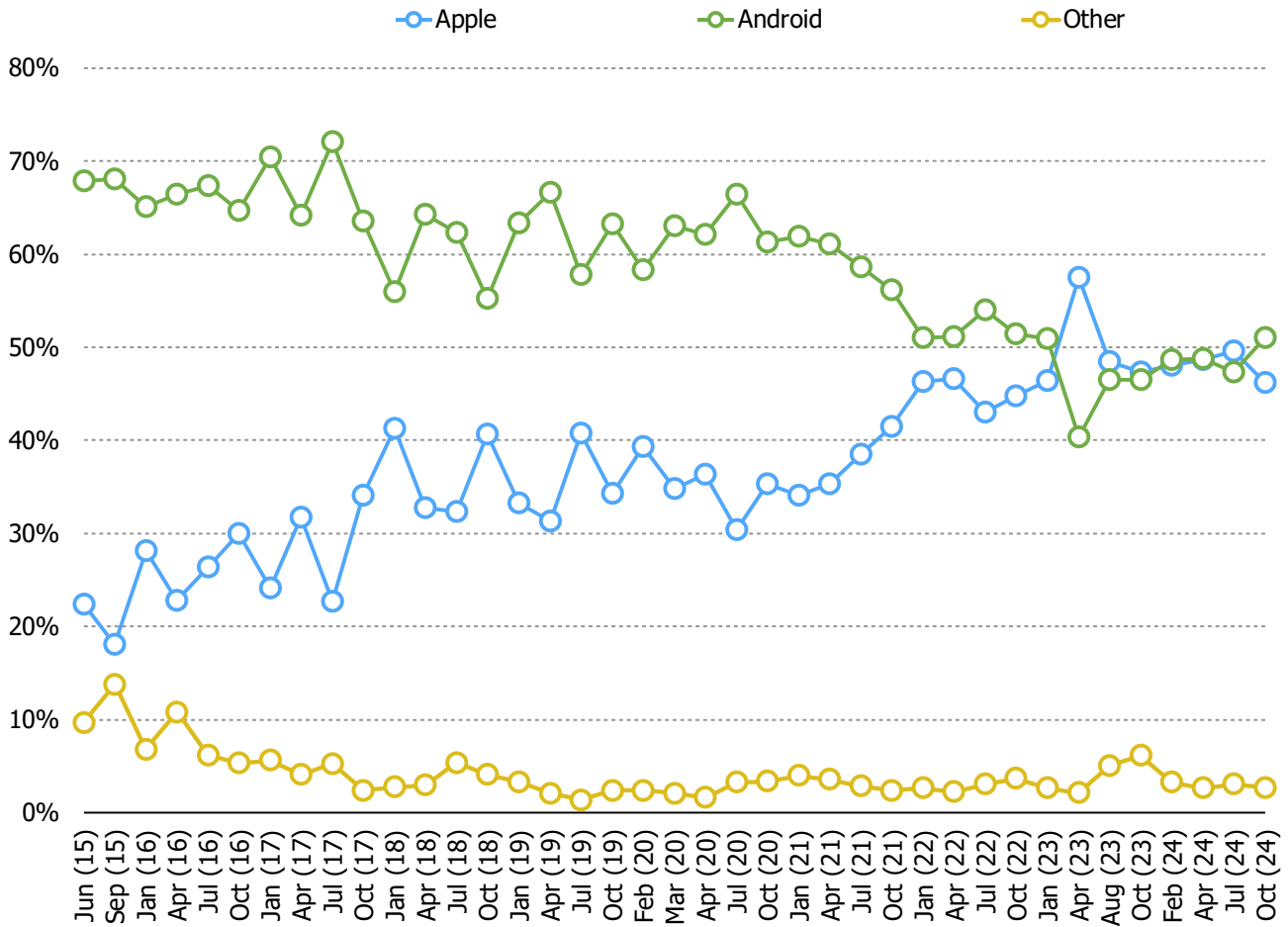
This question was posed to all respondents.



*Important Note: Since 2020 the share of respondents coming from Tier 1 Cities has increased while the share coming from Tier 2 Cities has declined.

SMARTPHONE OWNERS – WHICH SMARTPHONE DID YOU OWN BEFORE YOUR CURRENT SMARTPHONE?

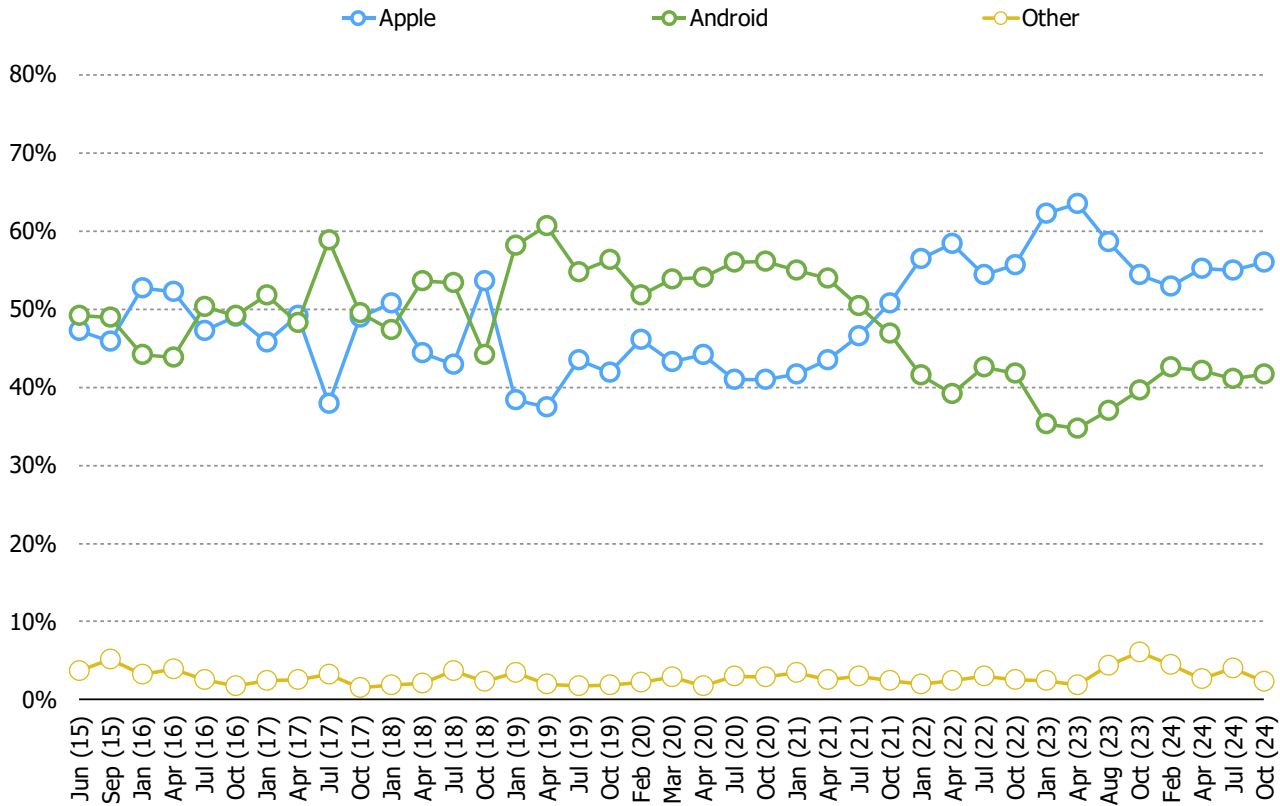
This question was posed to smartphone owners.



*Important Note: Since 2020 the share of respondents coming from Tier 1 Cities has increased while the share coming from Tier 2 Cities has declined.

SMARTPHONE OWNERS – WHICH SMARTPHONE WILL YOU CHOOSE FOR YOUR NEXT SMARTPHONE?

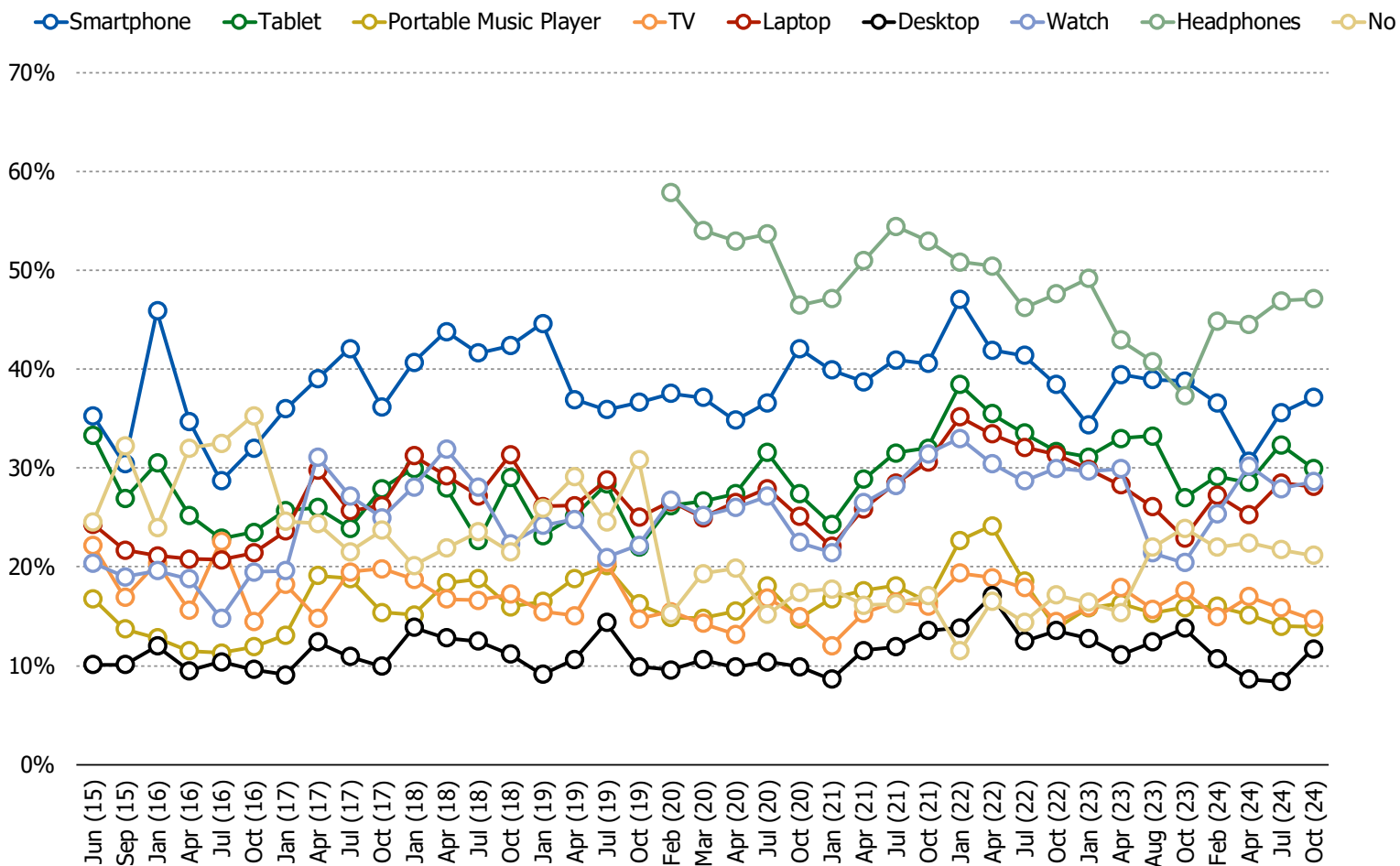
This question was posed to smartphone owners.



*Important Note: Since 2020 the share of respondents coming from Tier 1 Cities has increased while the share coming from Tier 2 Cities has declined.

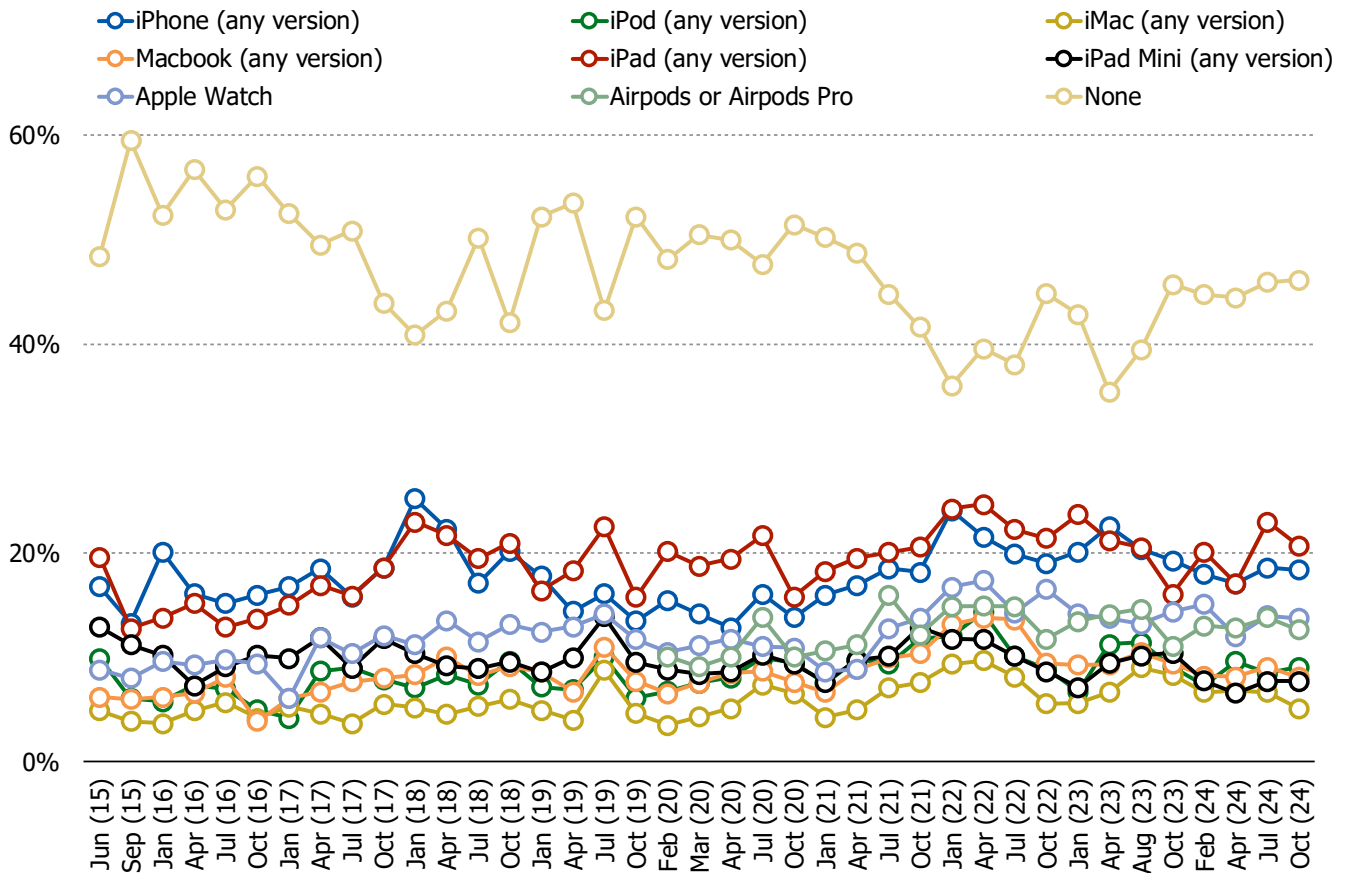
PURCHASED IN PAST THREE MONTHS

This question was posed to all respondents.



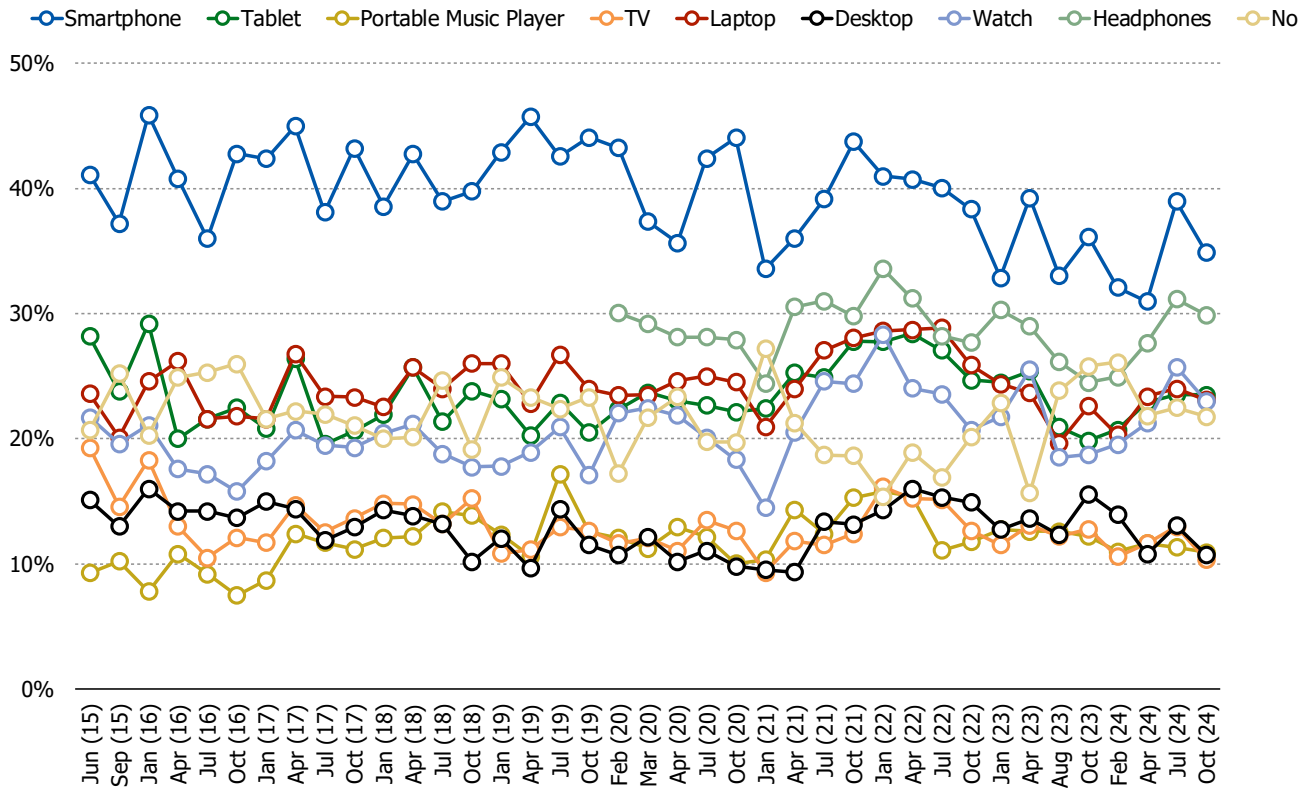
APPLE PRODUCTS PURCHASED IN PAST THREE MONTHS

This question was posed to all respondents.



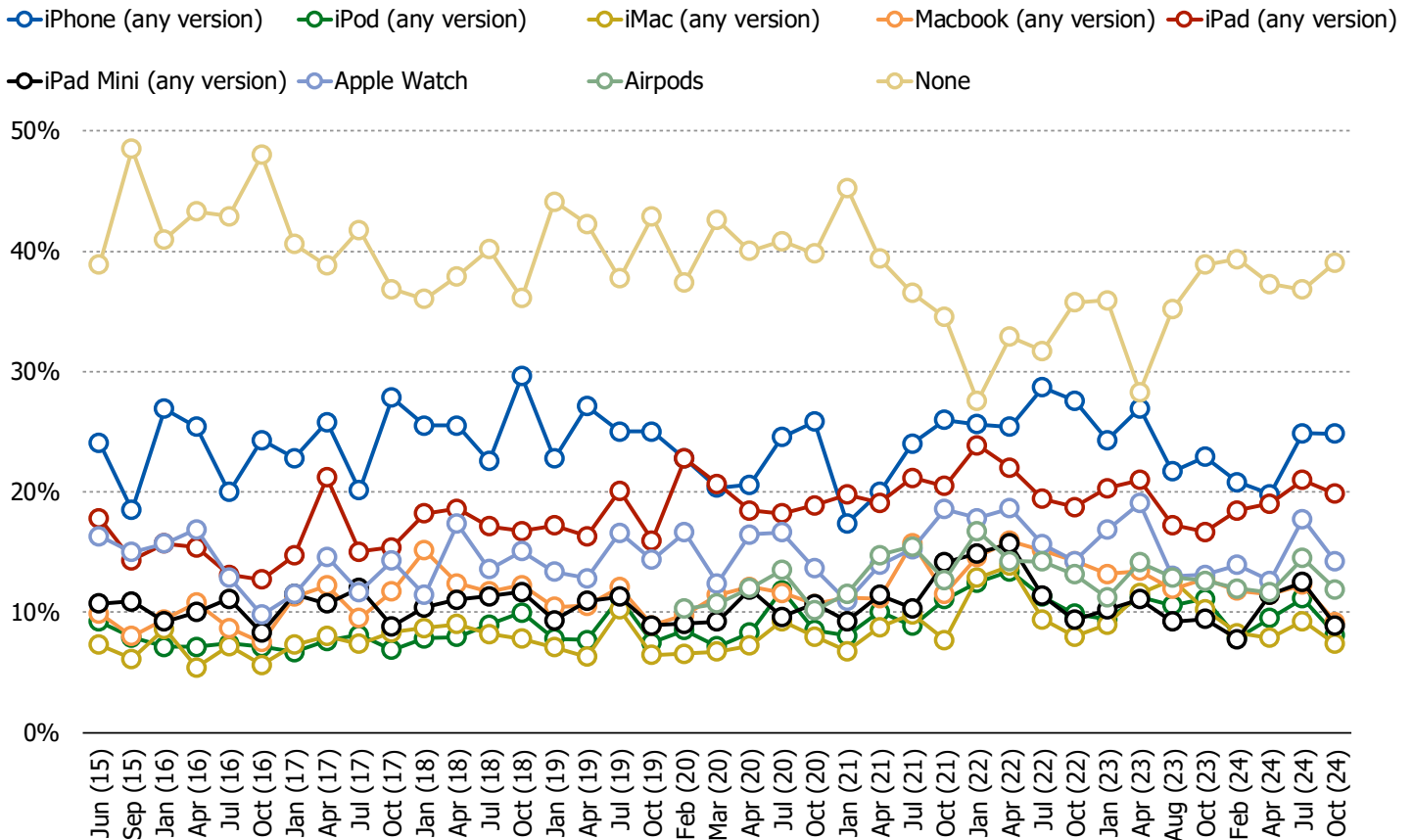
PLANS TO PURCHASE IN NEXT THREE MONTHS

This question was posed to all respondents.



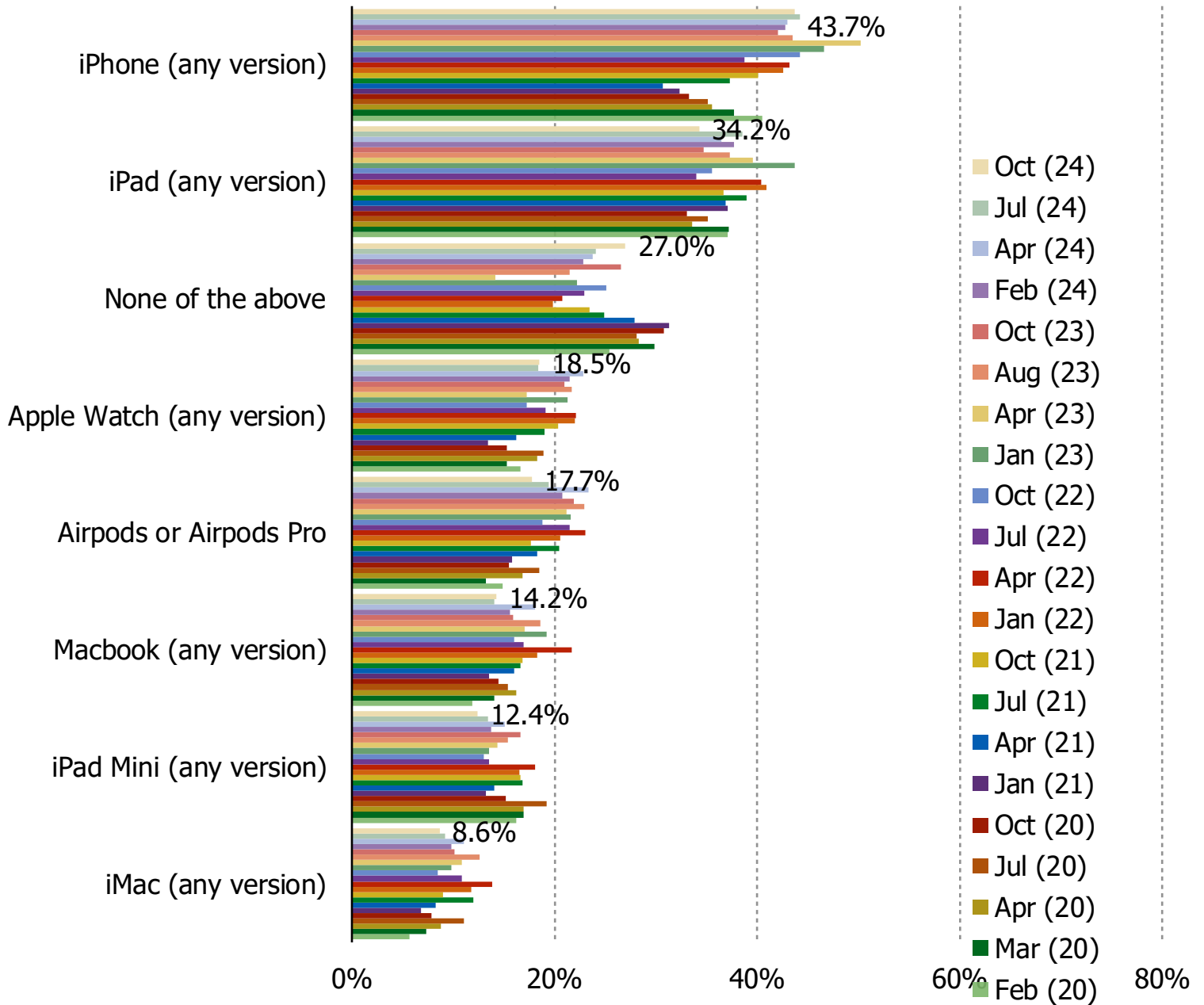
APPLE PRODUCTS – PLANS TO PURCHASE IN NEXT THREE MONTHS

This question was posed to all respondents.



PLEASE SELECT THE DEVICES YOU OWN FROM THE LIST BELOW (SELECT ALL)

This question was posed to all respondents.

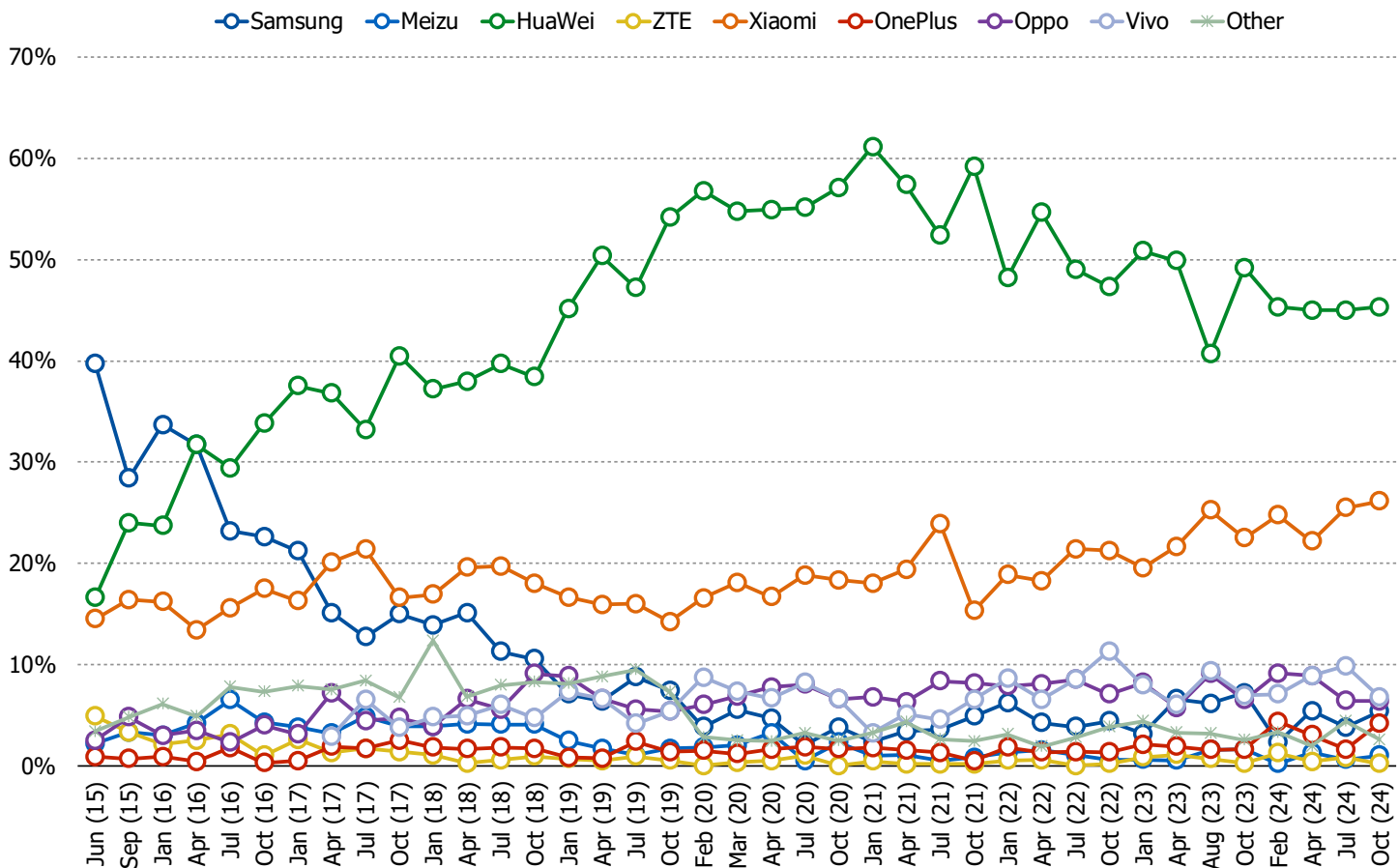


Apple vs. Android Overseas

IPHONE AND ANDROID MIX

ANDROID OWNERS - MIX

This question was posed to Android owners.



WHY DON'T YOU USE THE IPHONE?

This question was posed to all smartphone owners who DO NOT own iPhones.

October 2024

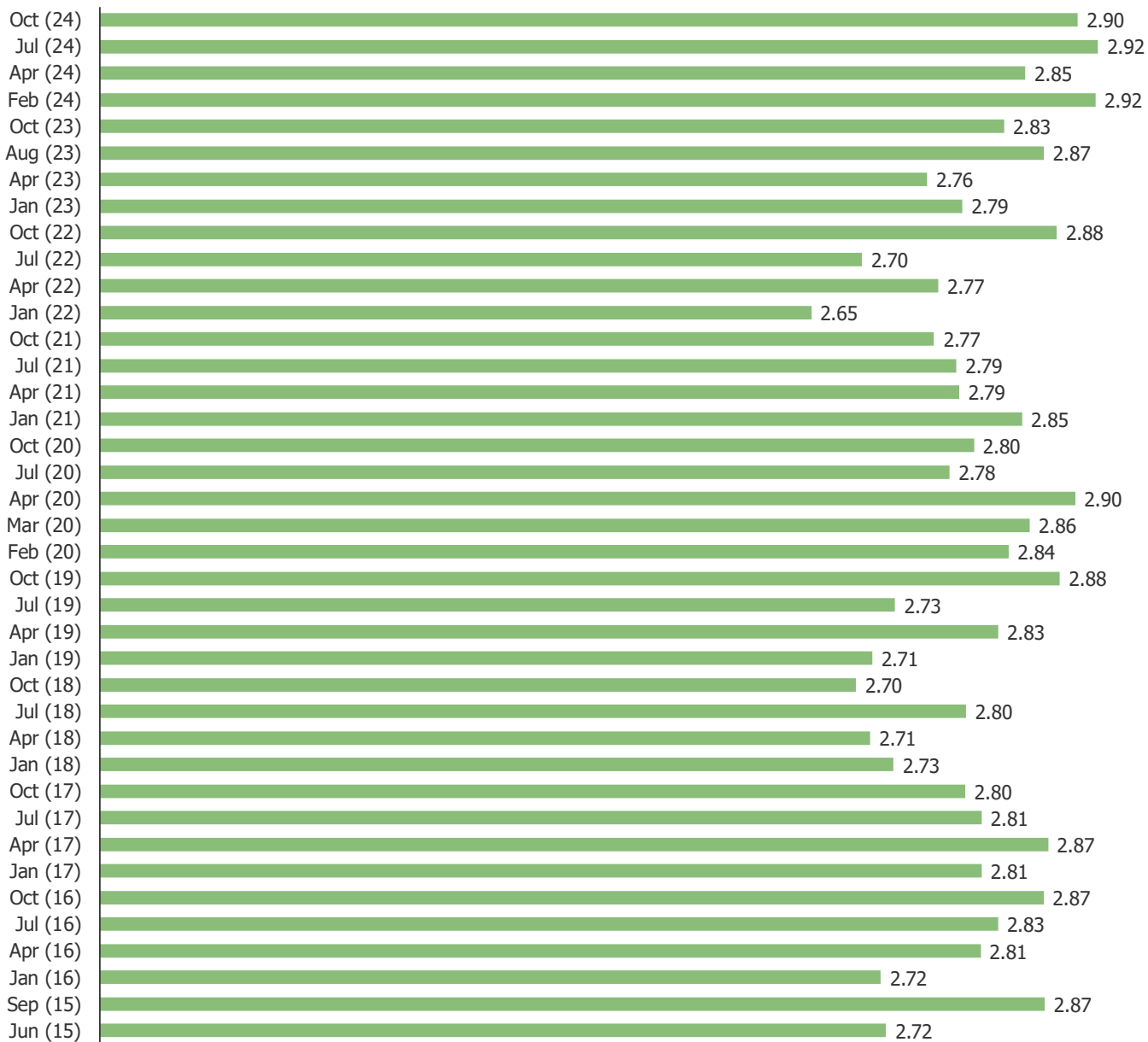


Apple vs. Android Overseas

SMARTPHONE PURCHASE FREQUENCY

WHEN DID YOU GET YOUR CURRENT SMARTPHONE?

This question was posed to smartphone owners.

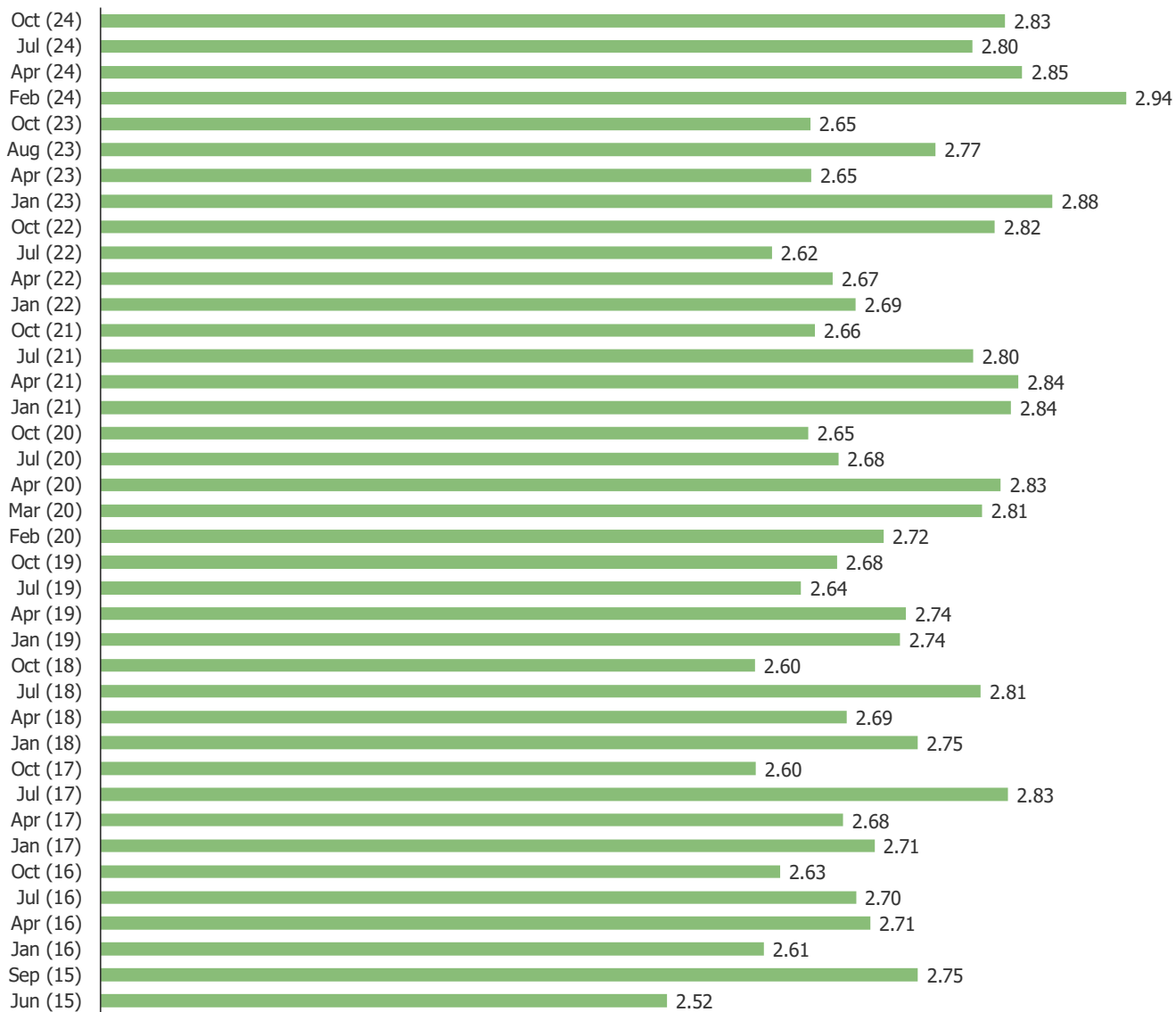


Past Three Months

Past Year

WHEN DO YOU PLAN TO GET A NEW SMARTPHONE?

This question was posed to smartphone owners.



Next Three Months

Next Year

HOW OFTEN DO YOU BUY A NEW SMARTPHONE?

This question was posed to smartphone owners.

