

# Bespoke Survey Research

October 2024

## Consumer Electronics

Volume 47 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: AAPL, AMZN, GOOG, Samsung.

### **Key Takeaways:**

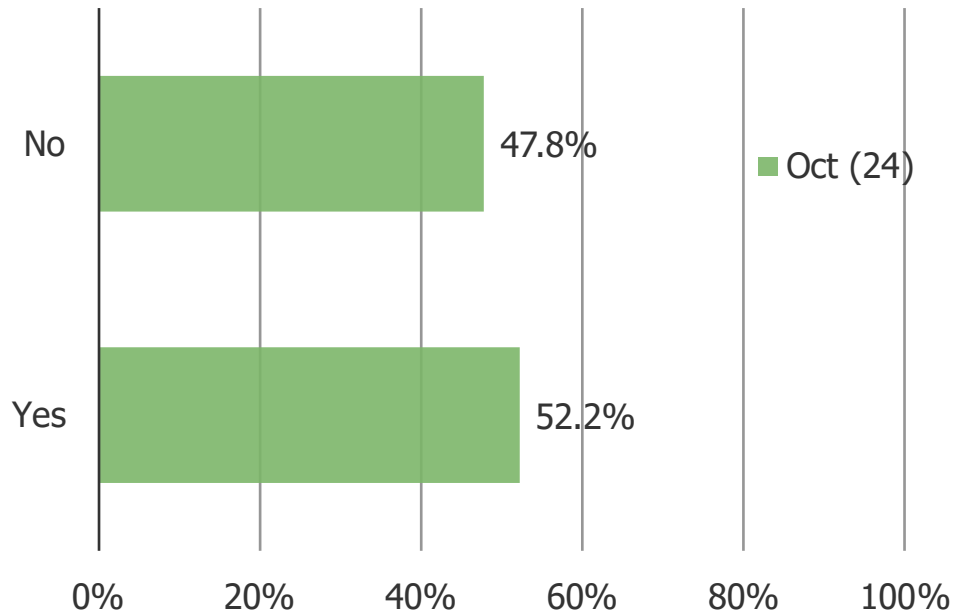
- ❑ 30.9% of iOS users characterize themselves as “extremely interested” in one of the new iPhone 16 models.
- ❑ Among iOS users who have interested in one of the newest models, the top reason for their interest is the new camera features. AI features is a factor, but not as much of a factor as the camera.
- ❑ There is interest among iOS users in iOS 18 and in the upcoming Apple Intelligence features. There is a cohort of iOS users who said they would get a new iPhone if Apple Intelligence was released and they found out their current device doesn’t allow them to use it (notably, owners of older iPhone models are less likely to say this than owners of new iPhone models).
- ❑ Consumer interest in having access to AI chatbots and apps while using smartphones and PCs has increased sequentially.
- ❑ Consumer usage of AI chatbots has increased over the history of our surveys. iOS users are more likely to be frequent users of AI chatbots than Android users.
- ❑ iOS users pick the ecosystem because they like the products the most, they are easiest to use, they are used to it, they are reliable, or because they think it is better quality.
- ❑ The top reasons for why iPhone owners decide to get a new iPhone include new features, more storage, a general upgrade, or just their prior phone not working anymore.
- ❑ The software pulls iPhone owners to the ecosystem more than the hardware or the services.
- ❑ The share of iPhone owners who own their current phone for more than three years reached a series high (dating back to April 2022).

# RECENTLY ADDED QUESTIONS

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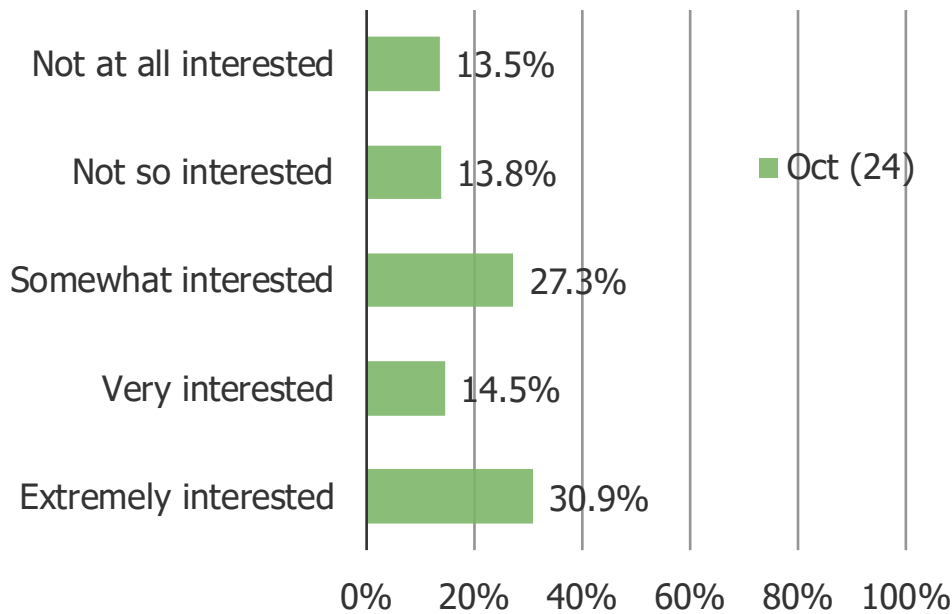
ARE YOU CURRENTLY CONSIDERING UPGRADING YOUR IPHONE TO A NEW/DIFFERENT MODEL THAN WHAT YOU HAVE NOW?

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



DO YOU HAVE ANY INTEREST IN THE LATEST IPHONES THAT WERE RELEASED? (IPHONE 16, IPHONE 16 PLUS, IPHONE 16 PRO, IPHONE 16 PRO MAX)

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

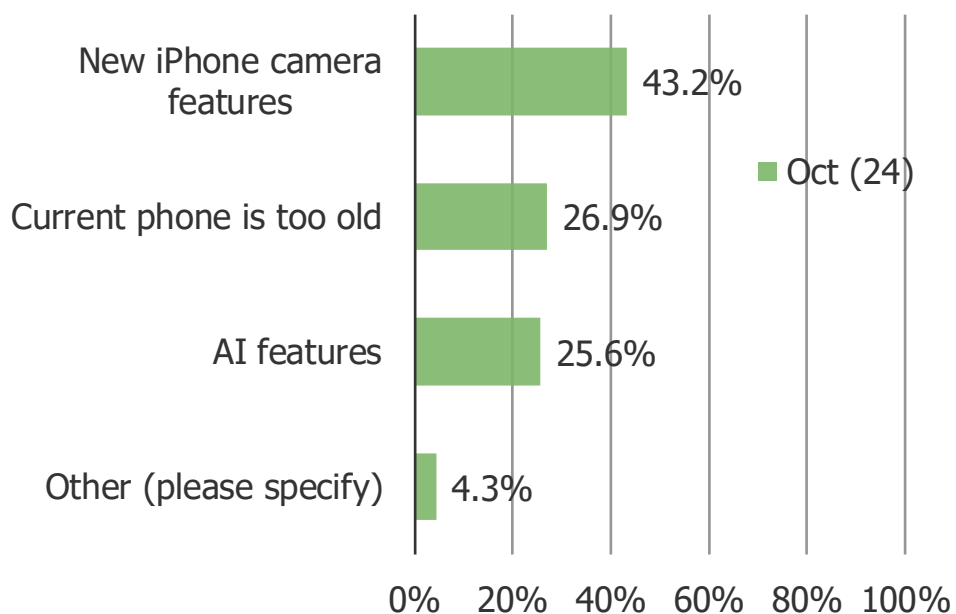


Optional Comments: Respondents who are very interested or extremely interested

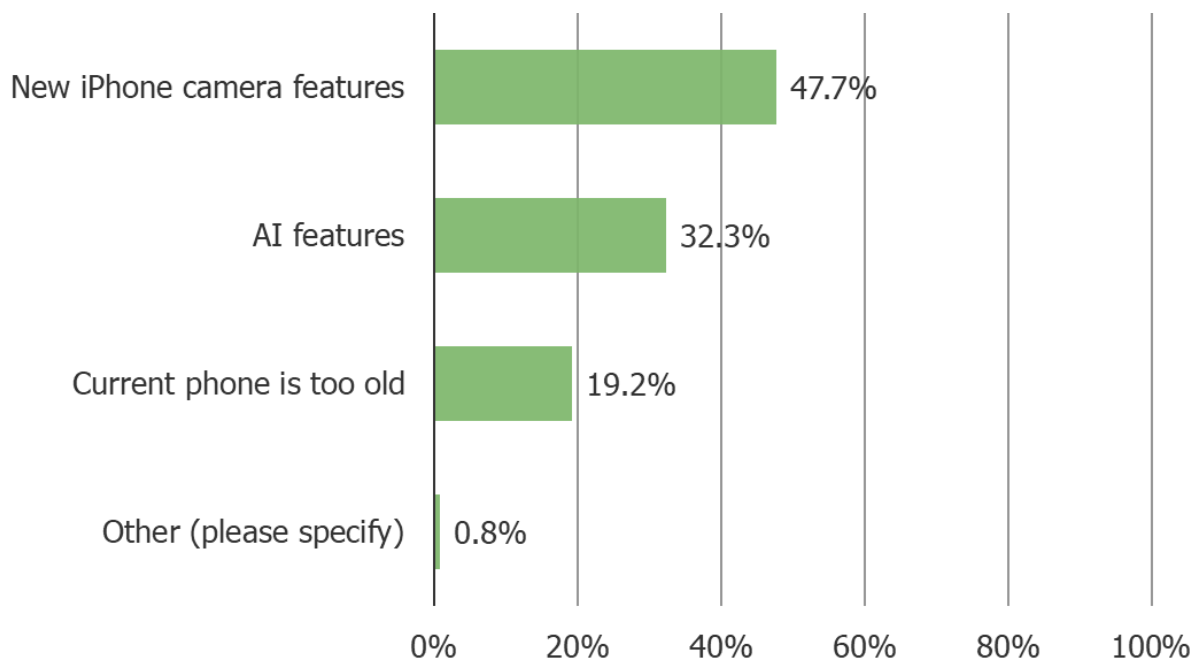
- Apple Intelligence
- I'm waiting for the iPhone 17
- The latest, the best
- I ordered an iPhone 16 pro for the camera. Still waiting for it to ship.
- This is a trusted brand & always new technology phone.
- I want the latest technology and new look of the new iPhone 16 Pro Max.
- Excellent
- I want the latest AI intelligence.
- I like some of the new features I have heard about.
- Newest
- It is newer than my current phone
- I like when the quality of the images the phones take continue to improve
- It seems like a good upgrade
- Upgrade
- good phone
- I will eventually update my phone and would like an Iphone 16
  
- Top reasons for not being interested include cost, recently getting a phone, or current phone still working fine.

YOU MENTIONED THAT YOU ARE AT LEAST SOMEWHAT INTERESTED IN ONE OF THE NEWEST IPHONES JUST RELEASED. WHAT MAKES YOU MOST INTERESTED IN THE NEW PHONE(S)?

This question was posed to all iOS users who are at least somewhat interested in one of the newest iPhones.

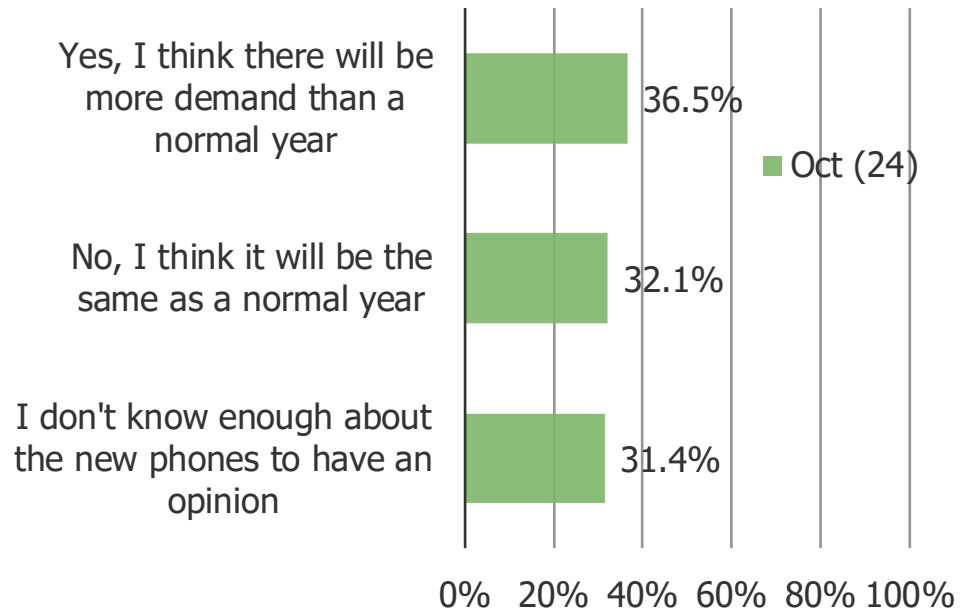


Focusing on iOS users who said they are extremely interested in one of the newest iPhones.



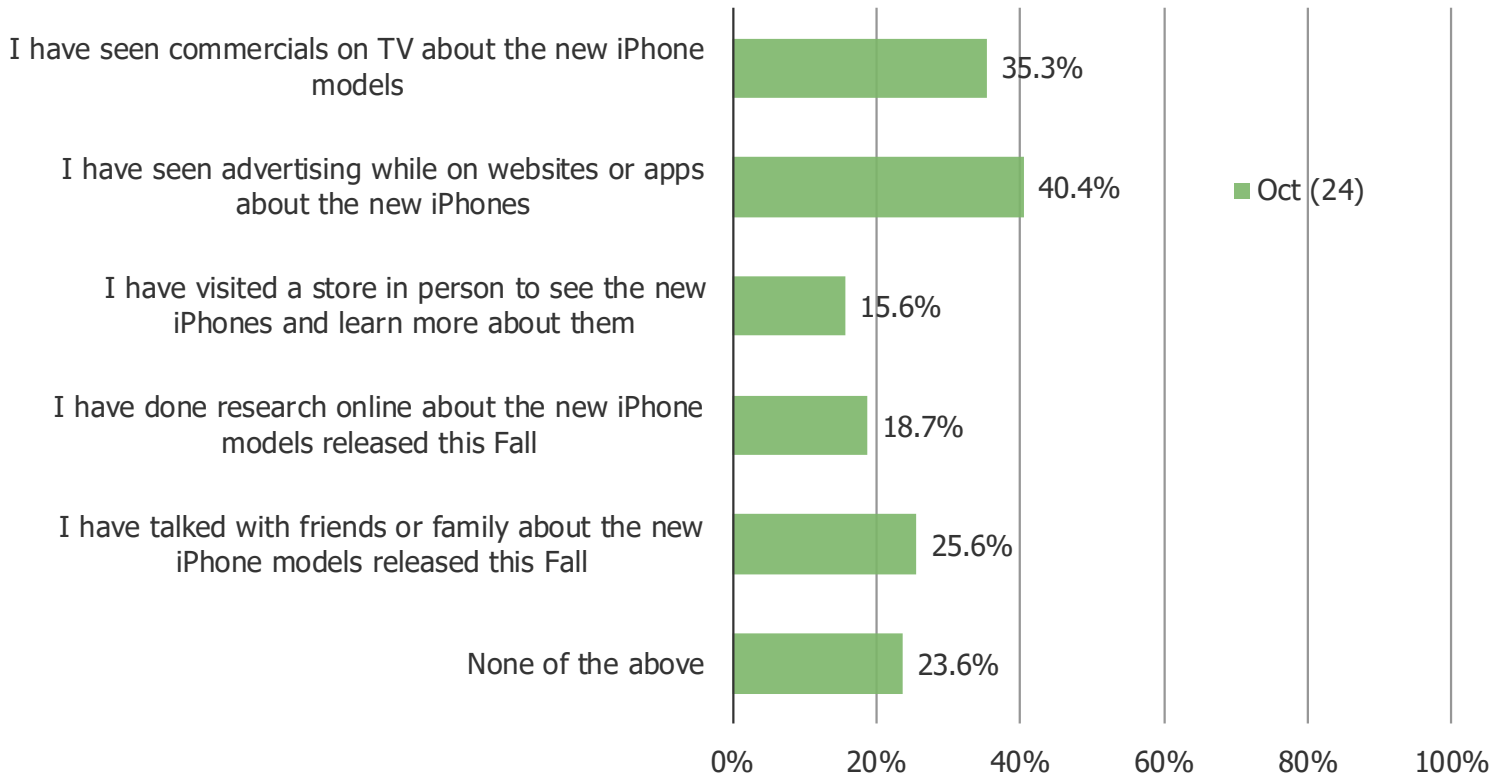
IN YOUR VIEW, DO YOU THINK THE NEWEST IPHONES (IPHONE 16, IPHONE 16 PLUS, IPHONE 16 PRO, IPHONE 16 PRO MAX) HAVE CHARACTERISTICS OR FEATURES ABOUT THEM THAT WILL CAUSE MORE IPHONE OWNERS TO UPGRADE COMPARED TO A TYPICAL YEAR WHEN NEW IPHONES ARE RELEASED?

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



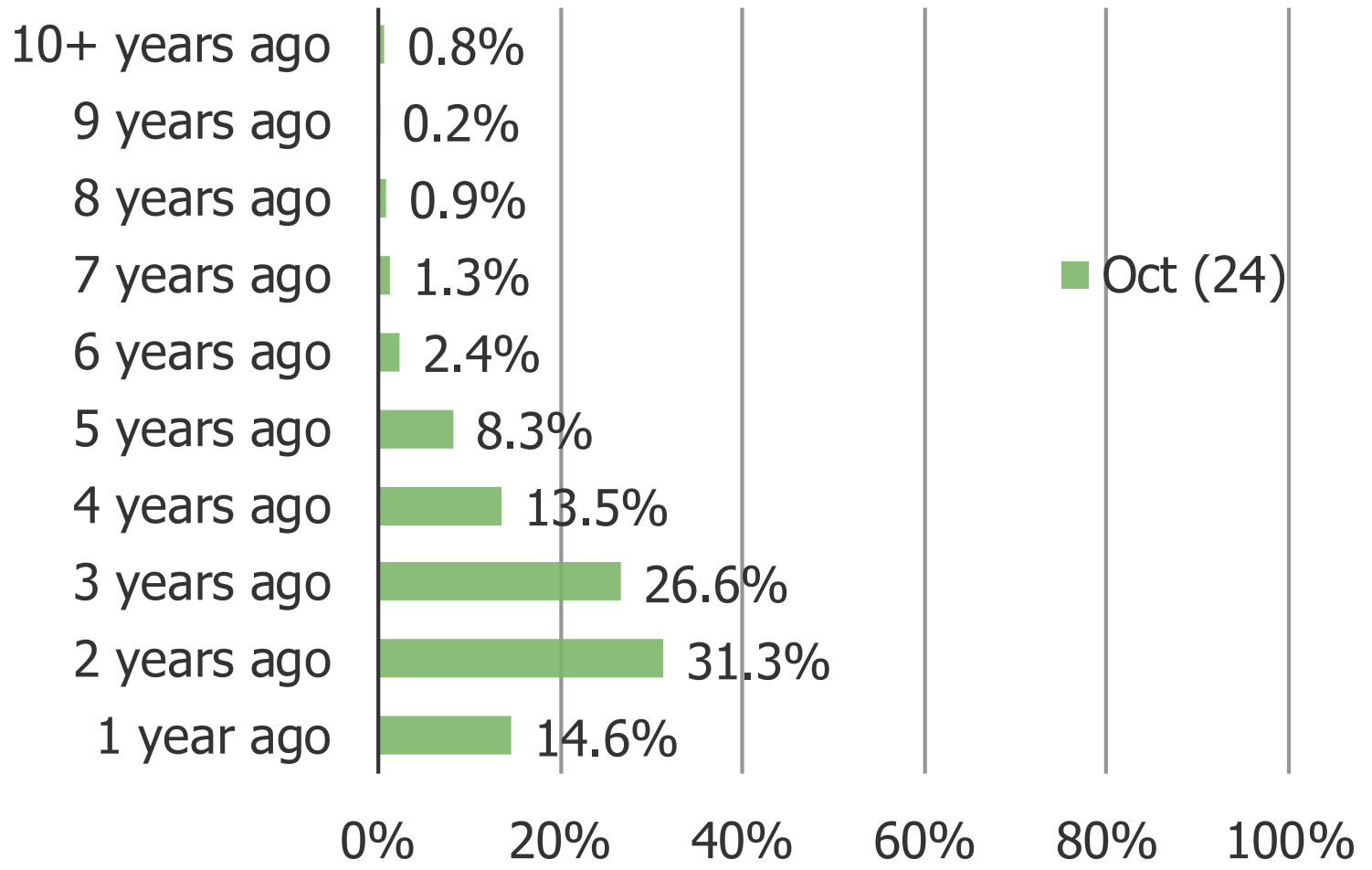
WHICH OF THE FOLLOWING DESCRIBES YOU... SELECT ALL THAT APPLY

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



YOU MENTIONED THAT YOU GOT YOUR SMARTPHONE MORE THAN A YEAR AGO. HOW MANY YEARS AGO DID YOU GET YOUR CURRENT SMARTPHONE?

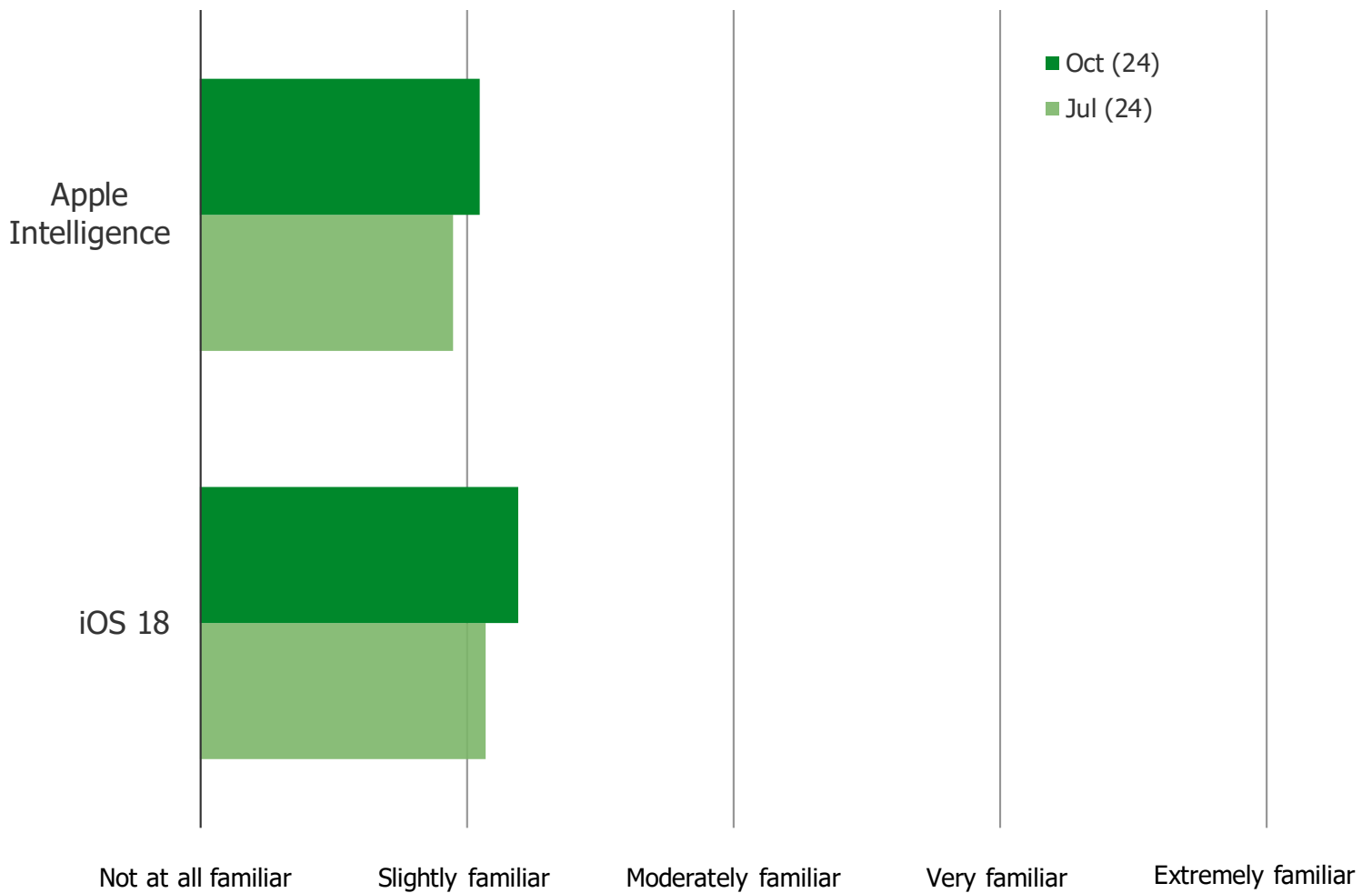
This question was posed to all respondents who got their smartphone more than a year ago.





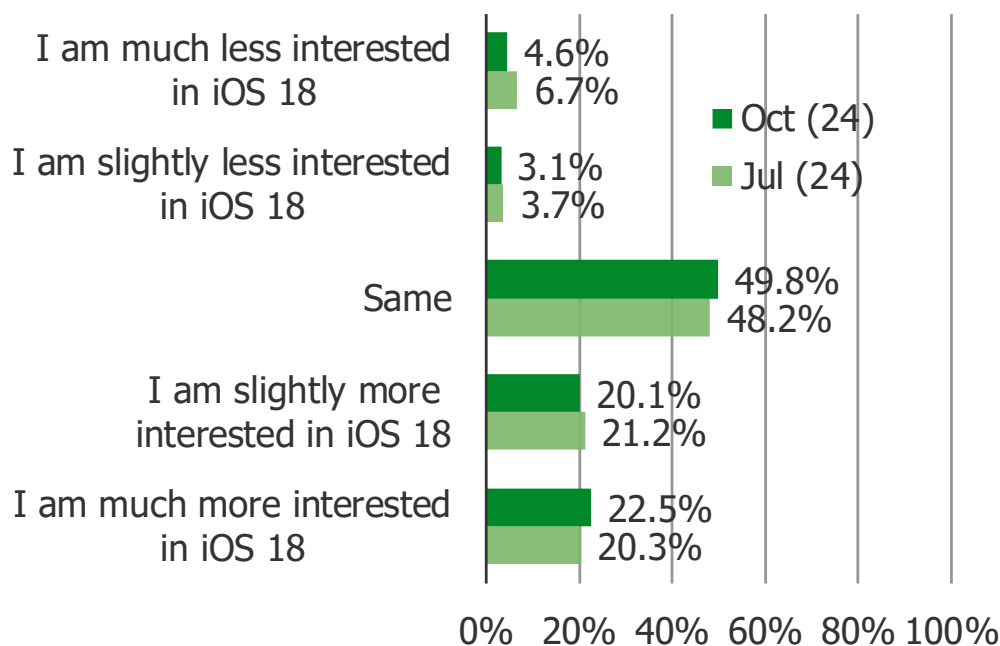
HOW FAMILIAR ARE YOU WITH IOS 18 AND WITH APPLE INTELLIGENCE?

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

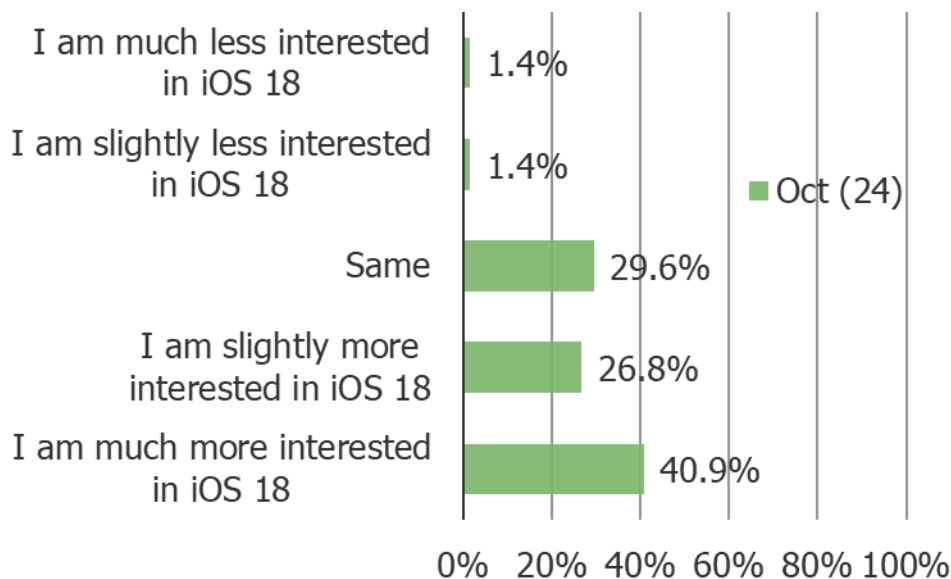


COMPARE YOUR LEVEL OF INTEREST IN IOS 18, TO BE RELEASED IN THE FALL OF 2024, WITH PRIOR IOS UPDATES.

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

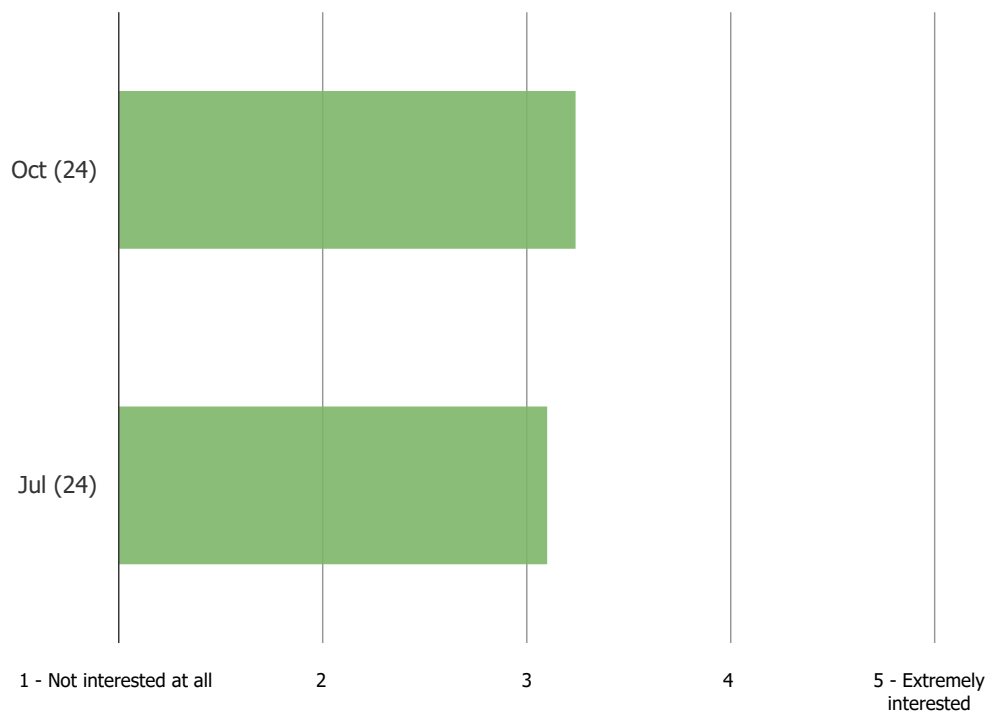


Filtering to respondents who are at least moderately familiar with iOS 18 (N = 142)



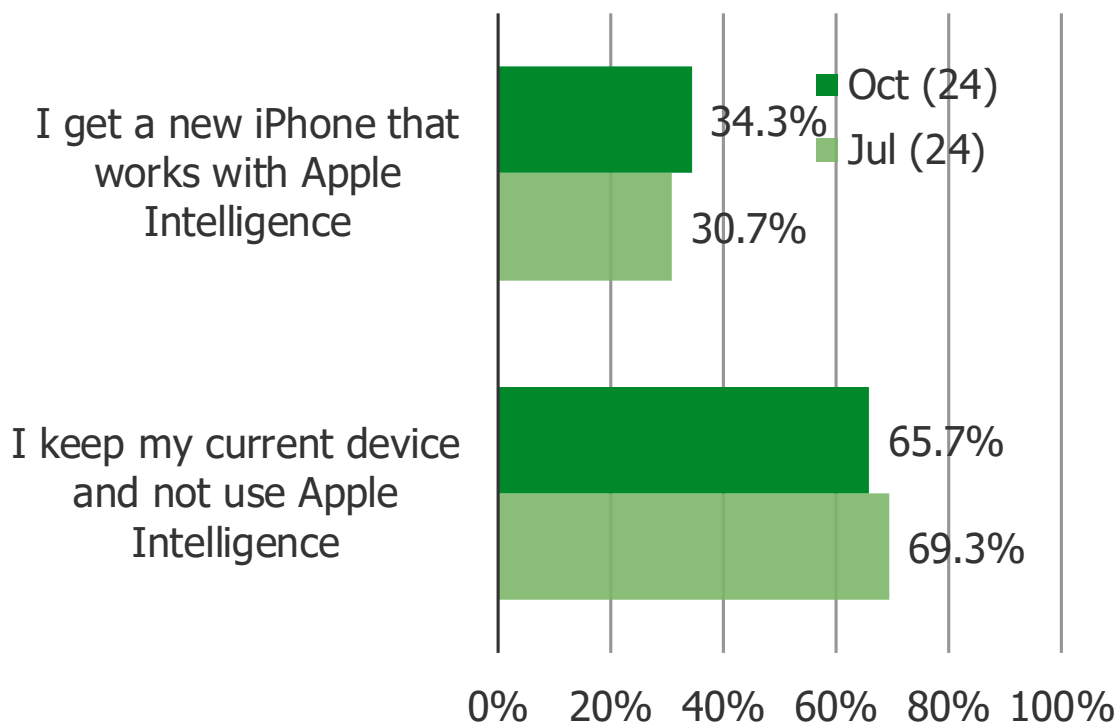
APPLE INTELLIGENCE WILL ENCOMPASS A SUITE OF AI AND MACHINE LEARNING FEATURES INTEGRATED ACROSS APPLE'S ECOSYSTEM, ENHANCING PERSONALIZED RECOMMENDATIONS, HEALTH AND FITNESS TRACKING, SIRI CAPABILITIES, IMAGE CREATION, WRITING TOOLS, AND PRIVACY MEASURES TO PROVIDE A MORE INTUITIVE, SECURE, AND CUSTOMIZED USER EXPERIENCE. THESE ADVANCEMENTS AIM TO MAKE INTERACTIONS WITH APPLE DEVICES AND SERVICES SMARTER AND MORE RESPONSIVE TO INDIVIDUAL NEEDS. **HOW MUCH INTEREST WOULD YOU HAVE IN USING AN IPHONE, IPAD, OR PC WITH APPLE INTELLIGENCE ON IT?**

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

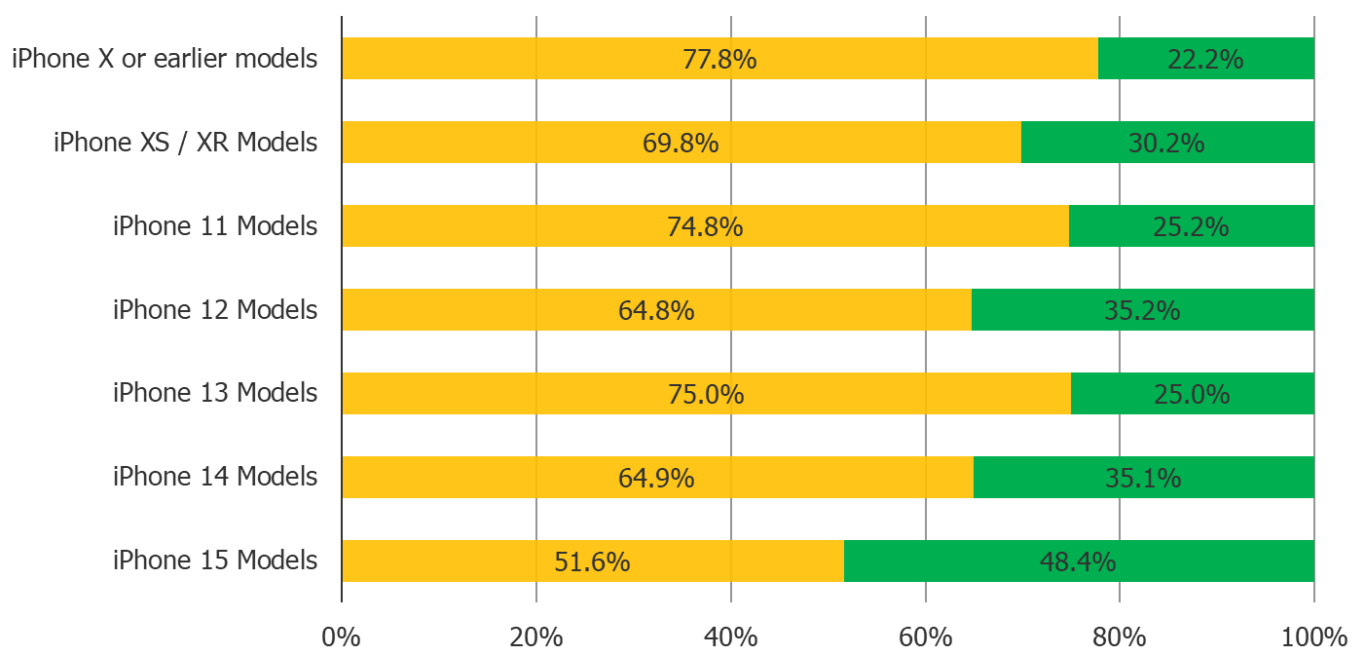


FAST FORWARD TO THIS FALL. IOS 18 COMES OUT WITH APPLE INTELLIGENCE ON IT AND YOU LEARN THAT YOUR CURRENT DEVICE DOES NOT ALLOW YOU TO USE APPLE INTELLIGENCE. WHAT DO YOU DO?

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



■ I keep my current device and not use Apple Intelligence ■ I get a new iPhone that works with Apple Intelligence



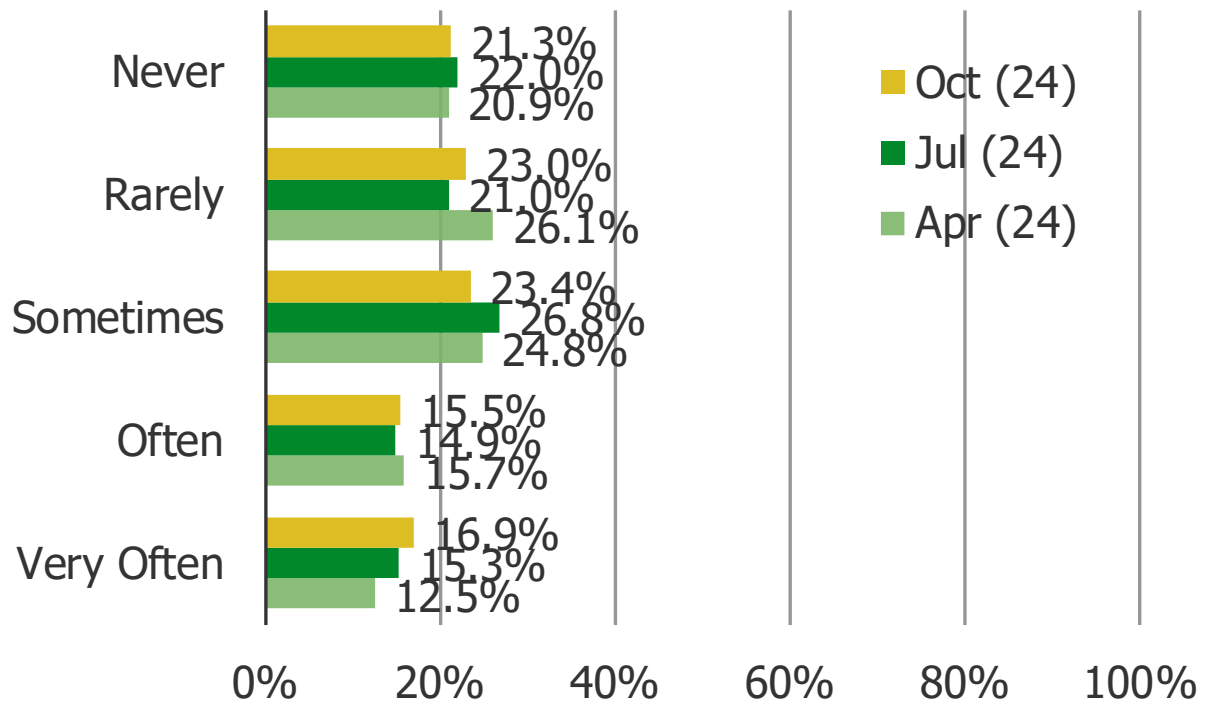
FAST FORWARD TO WHEN IOS 18 COMES OUT WITH APPLE INTELLIGENCE ON IT AND YOU LEARN THAT YOUR CURRENT DEVICE DOES NOT ALLOW YOU TO USE APPLE INTELLIGENCE. WHAT DO YOU DO?

Fill-Ins... (optional comments)

- Very interested
- AI holds little interest for me right now, and much of it is plagiaristic
- because I hate AI its dangerous
- because I just replace my phone
- Because I know how to operate my phone well enough without the assistance of an AI.
- Because the new technology is cool
- Depends upon if my phone is working ok or not, if need a replacement then would willingly upgrade
- Don't have enough money for new devices
- Effective
- For their best tech activated model
- Good either way
- HATE anything AI
- I am 73, retired and on a fixed income
- I am simply not a big tech geek that needs everything on my phone.
- I can't afford to upgrade again so soon
- I can't pay for something extra with a fixed income.
- I do not care about ai
- I don't necessarily need it
- I don't trust it
- I don't really care if I have it or not.
- I don't use all the bells and whistles
- I enjoy the updated technology and security updates
- I haven't known much about it yet
- I just got this iPhone a month ago
- I like it
- I like my current system and I only have one apple device, my I phone
- I use my iPhone for everything. Anything Apple does to make it easier and more secure has historically been awesome
- I usually cannot afford the newest models and are skeptical of AI
- I'll wait until the bugs have been worked out
- I'm not in a rush to upgrade.
- If I buy the I16, hopefully it has it.
- I'm leery of AI and what it does. Not sure I trust it.
- It depends on my affordability to purchase a new phone
- It's newer
- I've got reservations about using AI
- keep it simple stupid KISS
- My current device will have Apple ai
- New Apple phones are so expensive.
- No opinion
- no use wasting money
- Not sure
- Not trying to spend money unnecessarily just for new tech. Plus, it will get even better later (planned obsolescence... duh).
- privacy
- Should be better.
- Useful features and processes.
- Want latest features

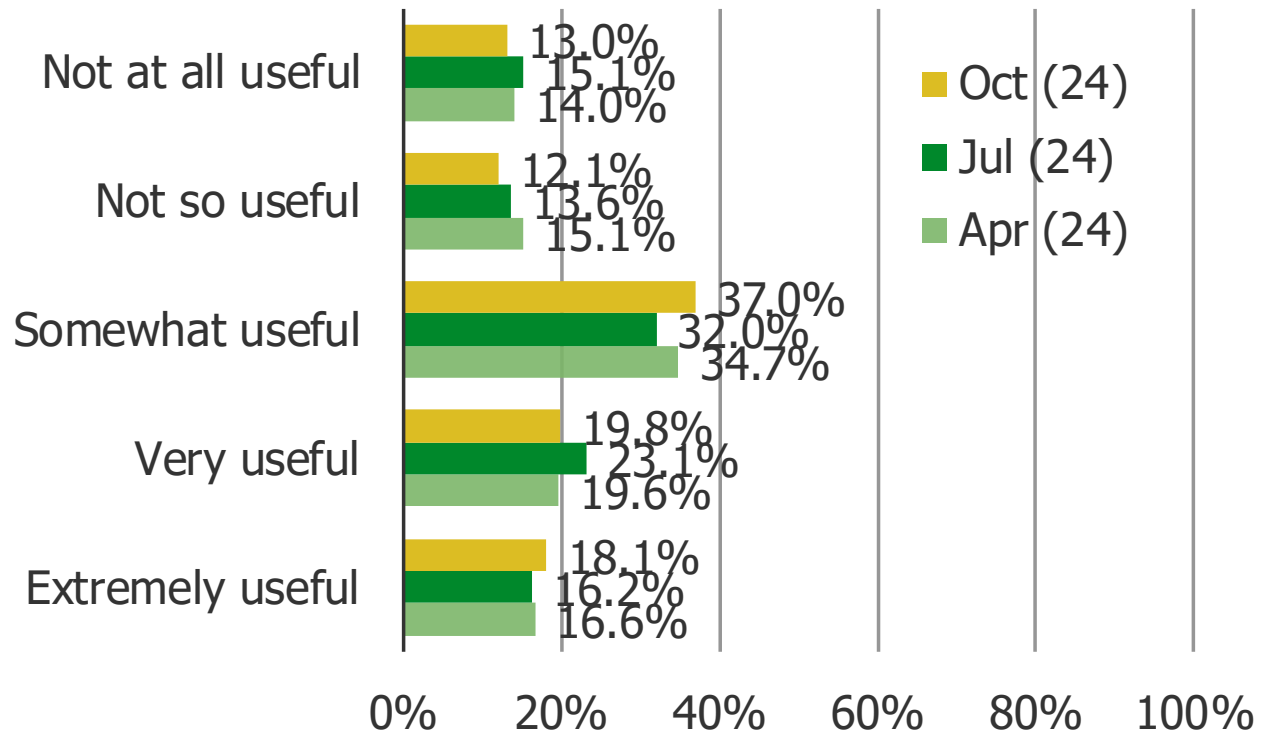
HOW OFTEN DO YOU USE SIRI ON YOUR IPHONE NOW?

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



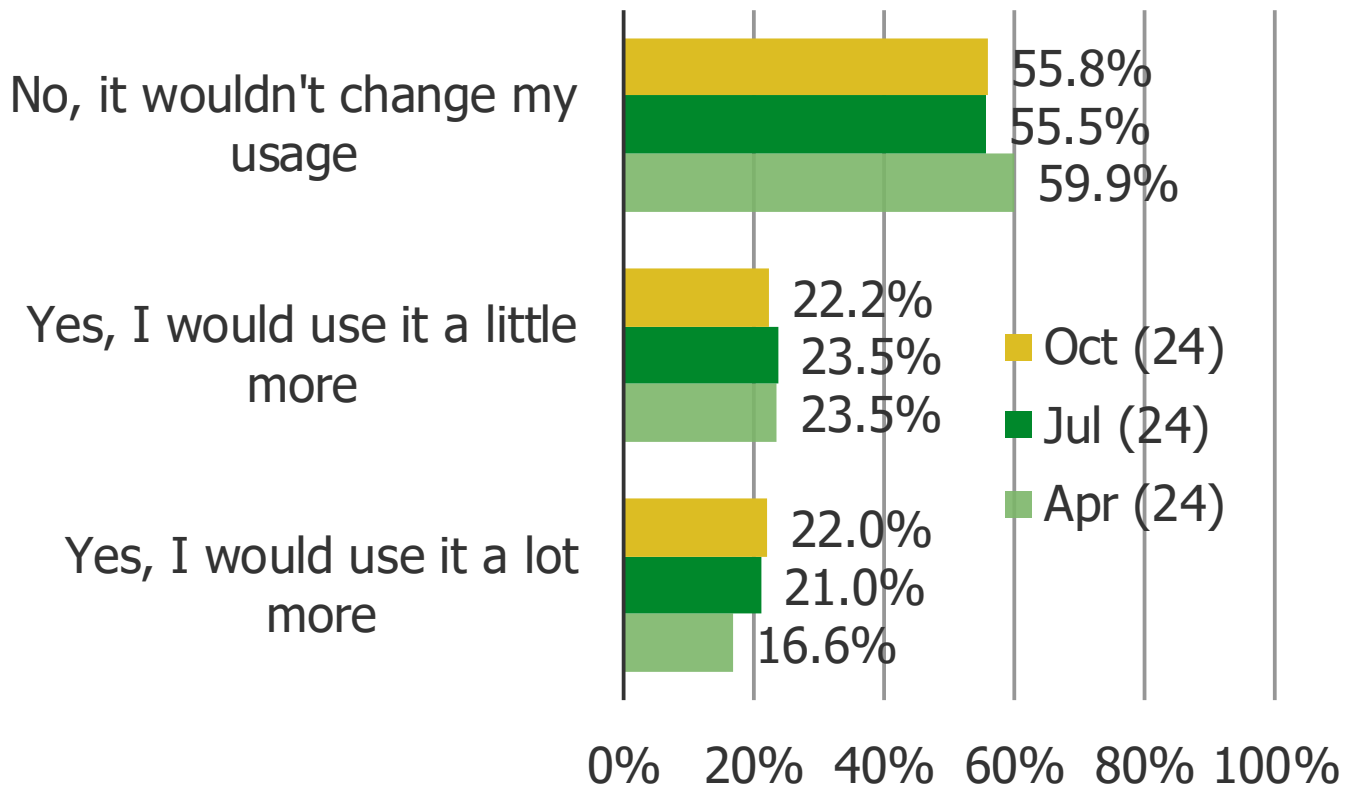
HOW USEFUL DO YOU FIND SIRI TO BE?

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)

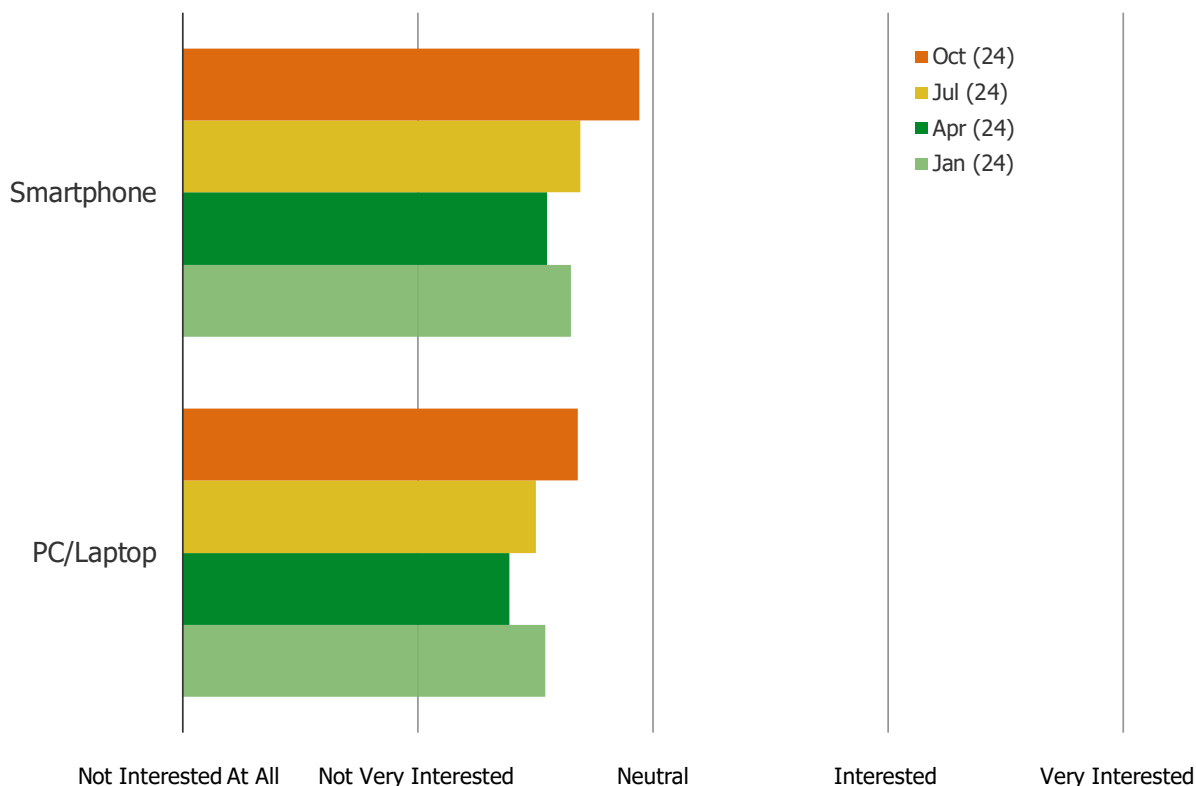
This question was posed to all respondents who are iOS users.



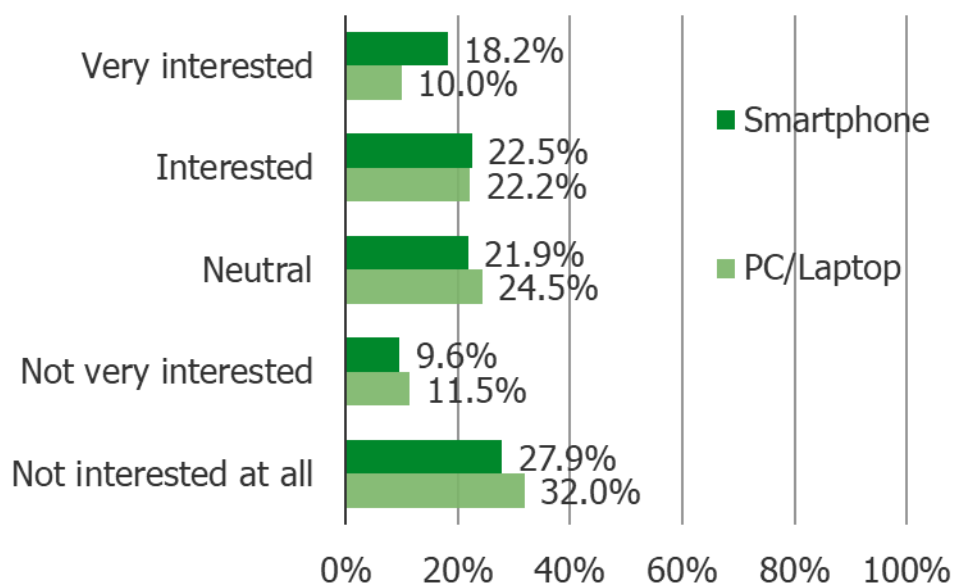


HOW INTERESTED ARE YOU IN USING AI (ARTIFICIAL INTELLIGENCE) CHATBOTS AND APPS, LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, ETC) WHILE USING THE FOLLOWING DEVICES...

This question was posed to all respondents.

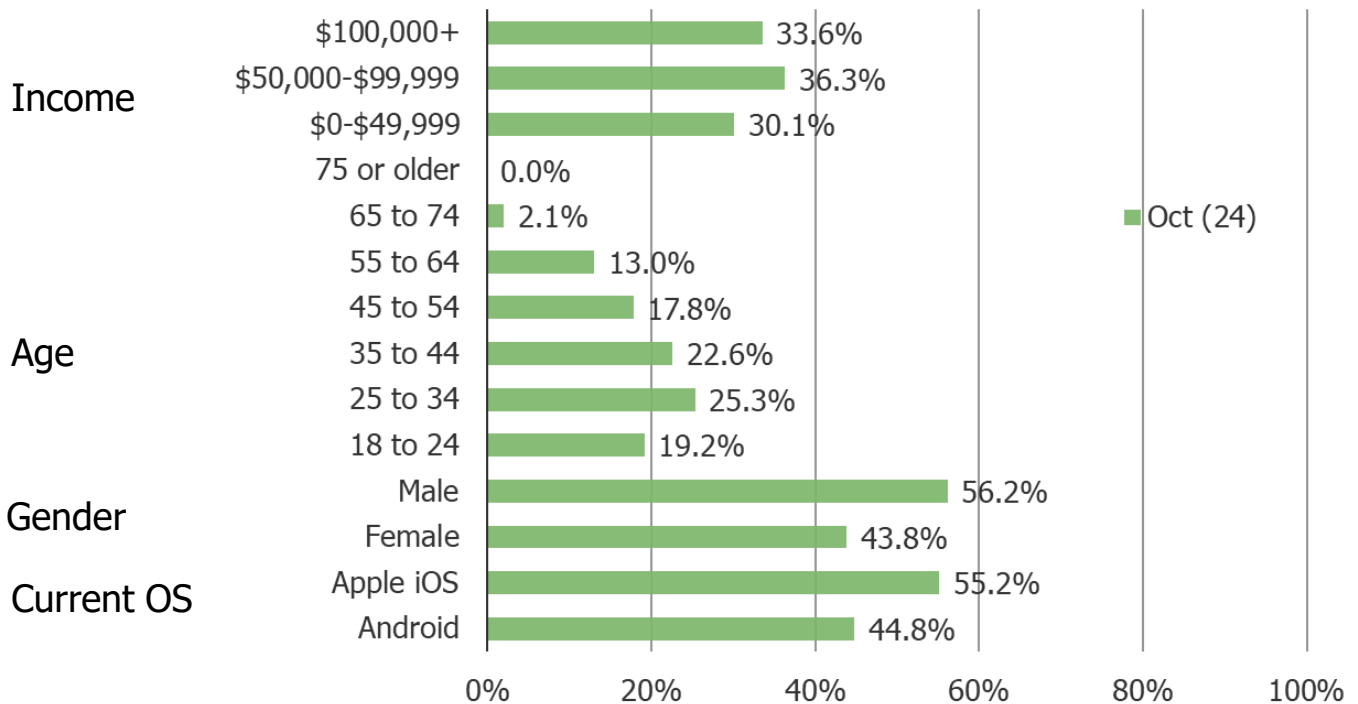
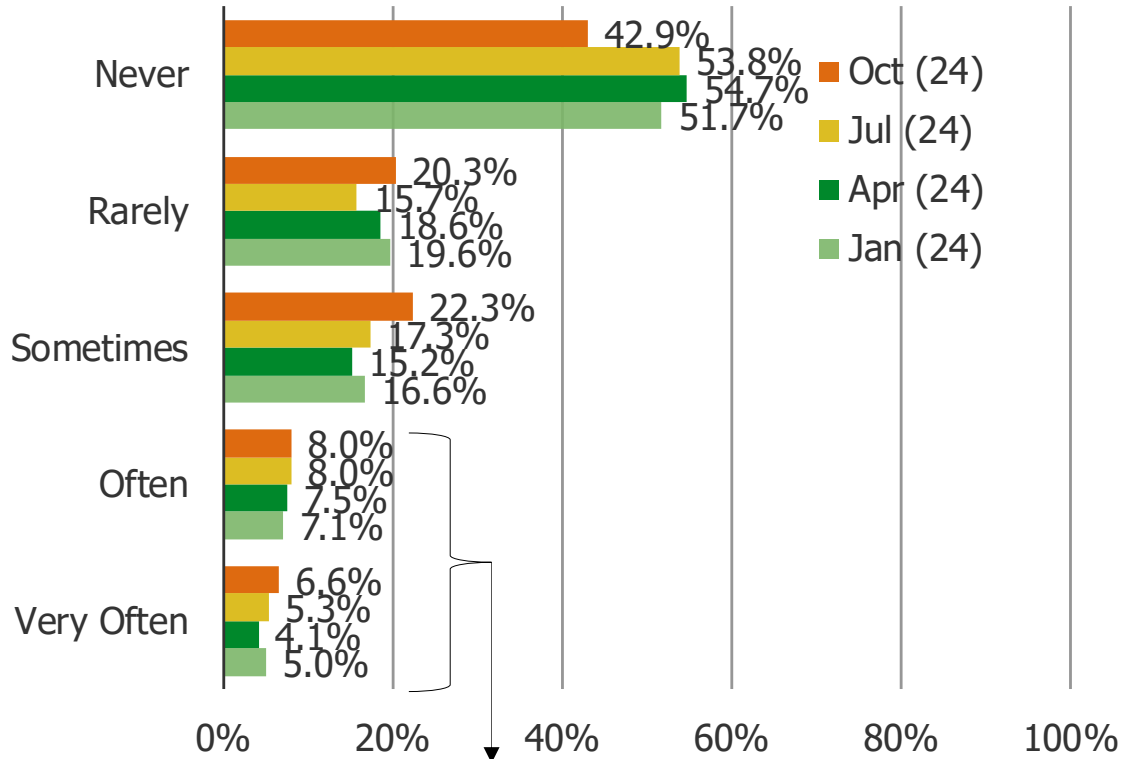


October 2024 Data Breakout



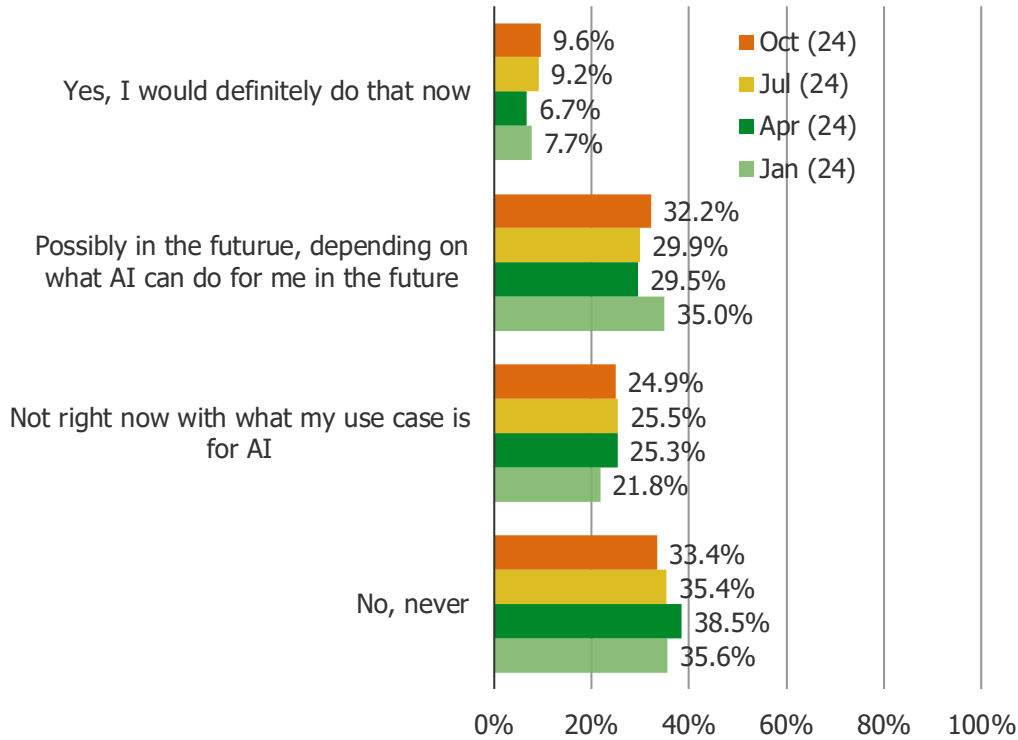
HOW OFTEN DO YOU USE AI CHATBOTS LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, OR OTHERS IN YOUR LIFE?

This question was posed to all respondents.



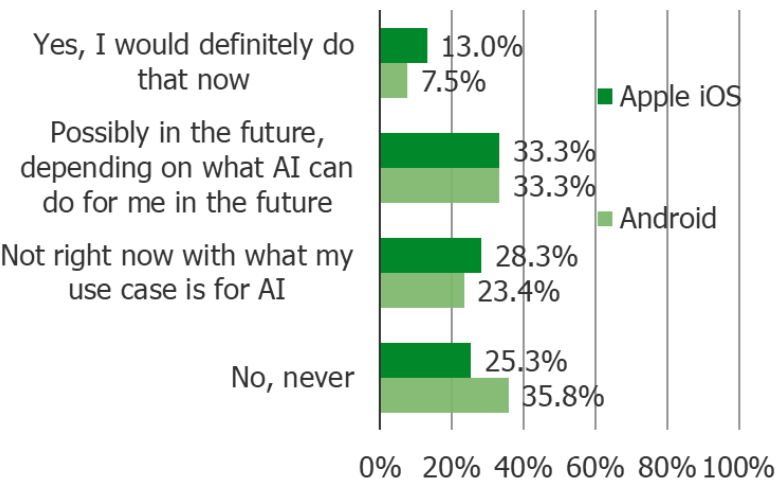
COULD YOU EVER SEE YOURSELF GOING OUT AND BUYING A NEW SMARTPHONE OR LAPTOP IF THOSE DEVICES WERE ABLE TO WORK BETTER WITH AI RELATED APPS THAN THE EXISTING ONES YOU OWN?

This question was posed to all respondents.

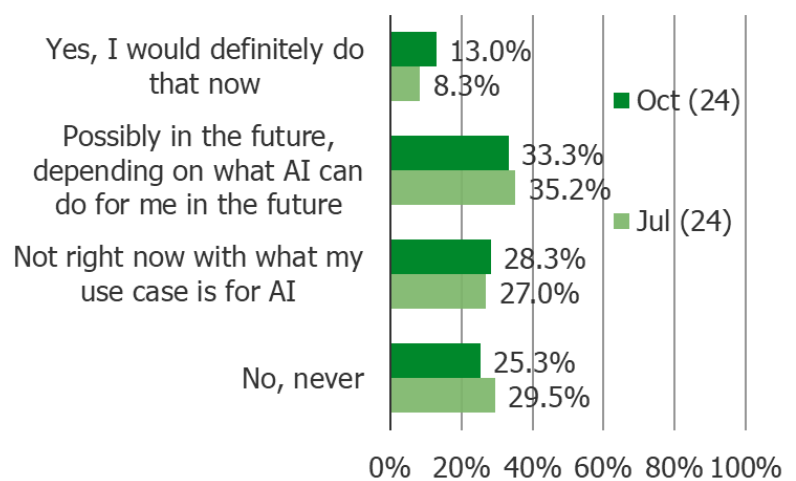


Cross-Tabbing The Above Data:

Apple vs. Android Users (OCT 24 Data)

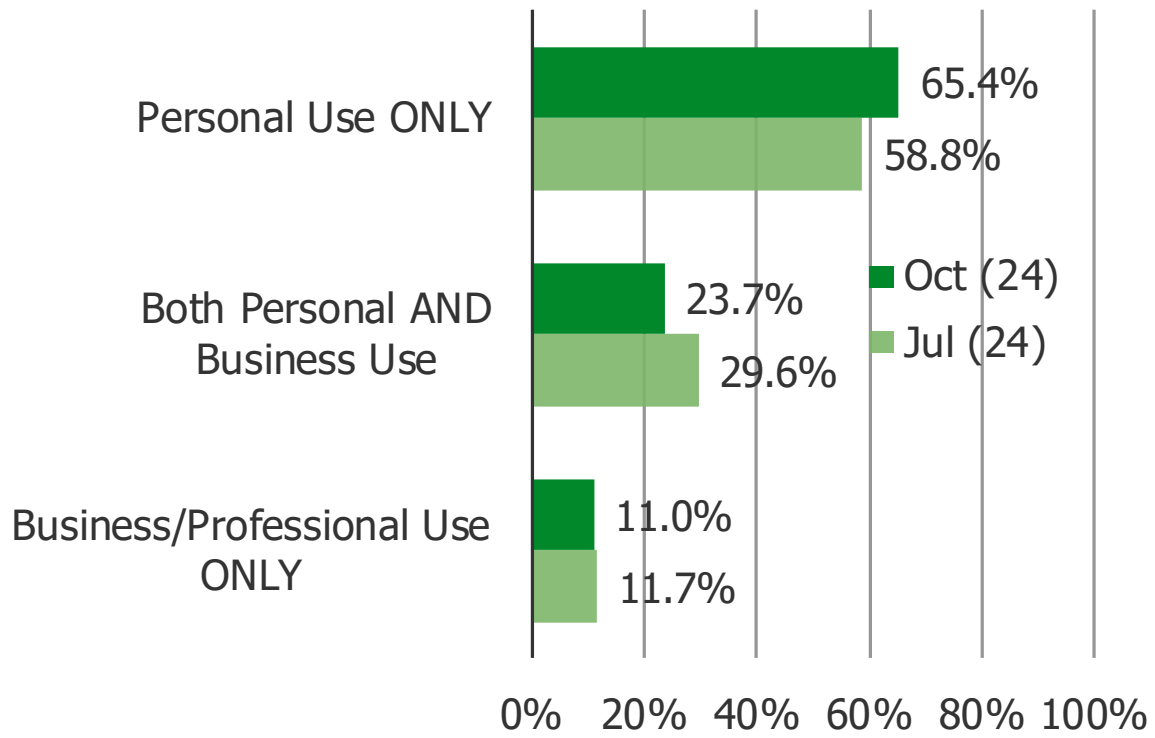


iOS Users (October vs. July)



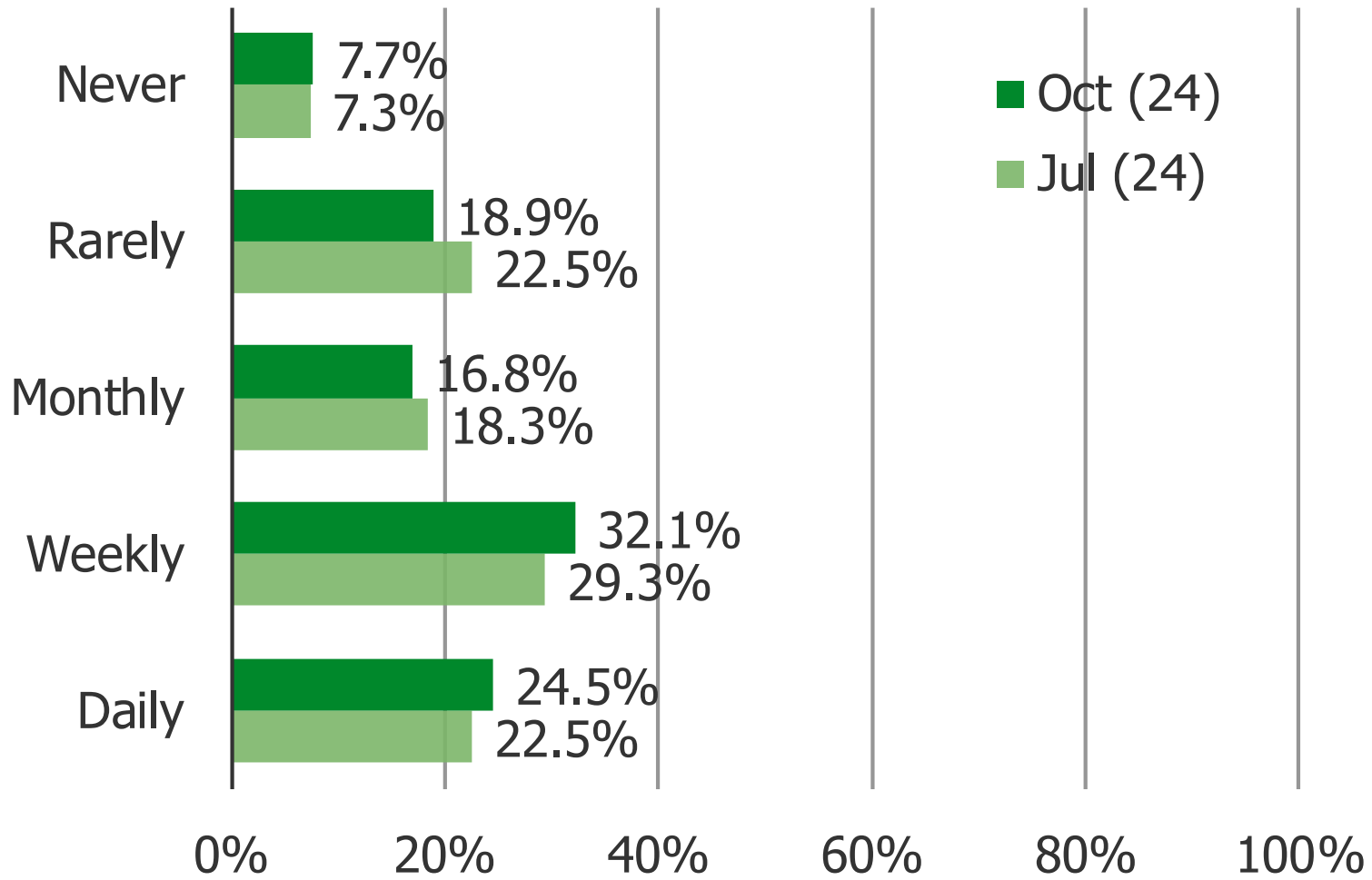
WHAT DO YOU USE AI CHATBOTS (LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, ETC) FOR?

This question was posed to respondents who use AI chatbots more than never (N = 567)



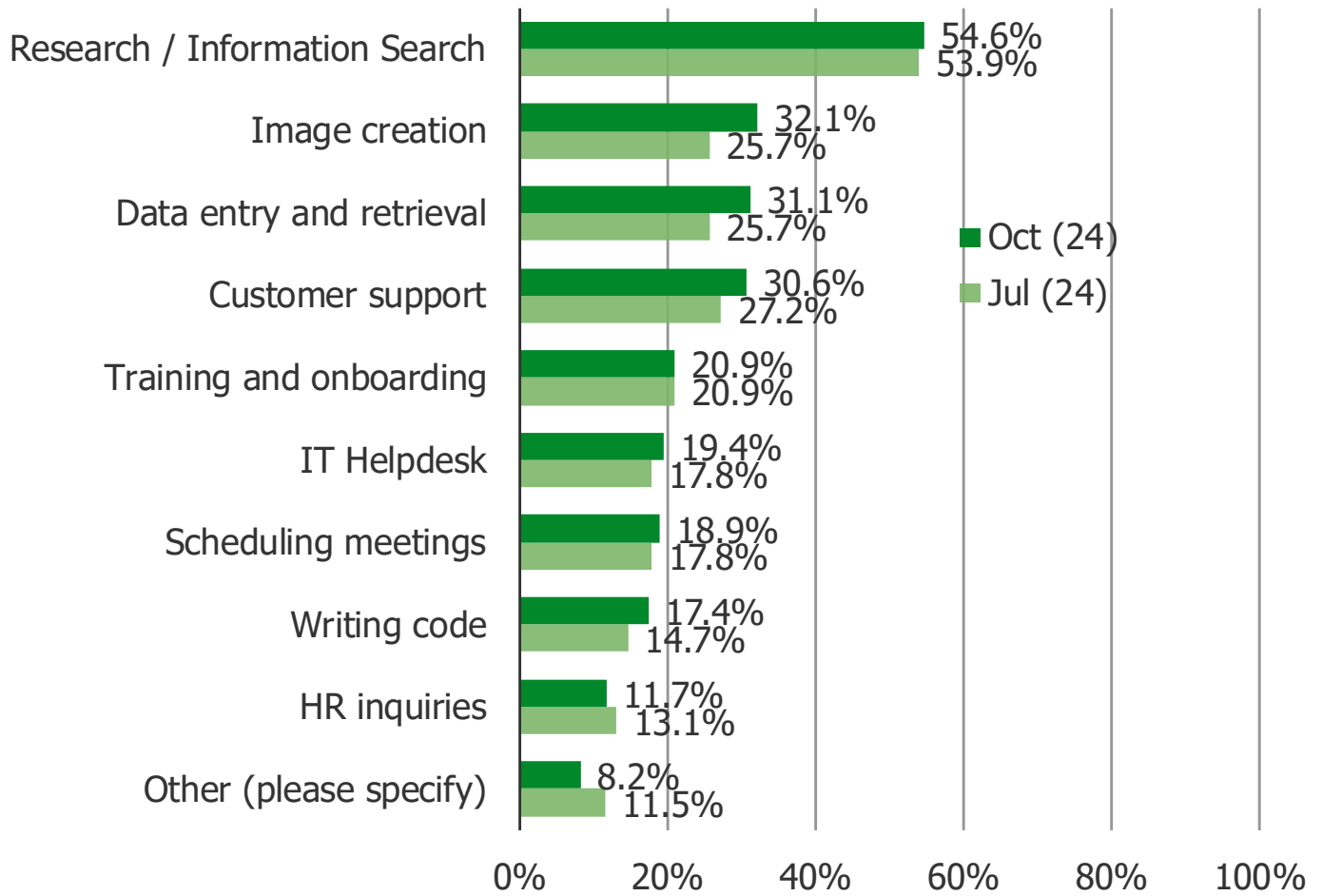
HOW FREQUENTLY DO YOU USE AI CHATBOTS AT WORK?

This question was posed to all respondents who use AI chatbots for work (N = 196)



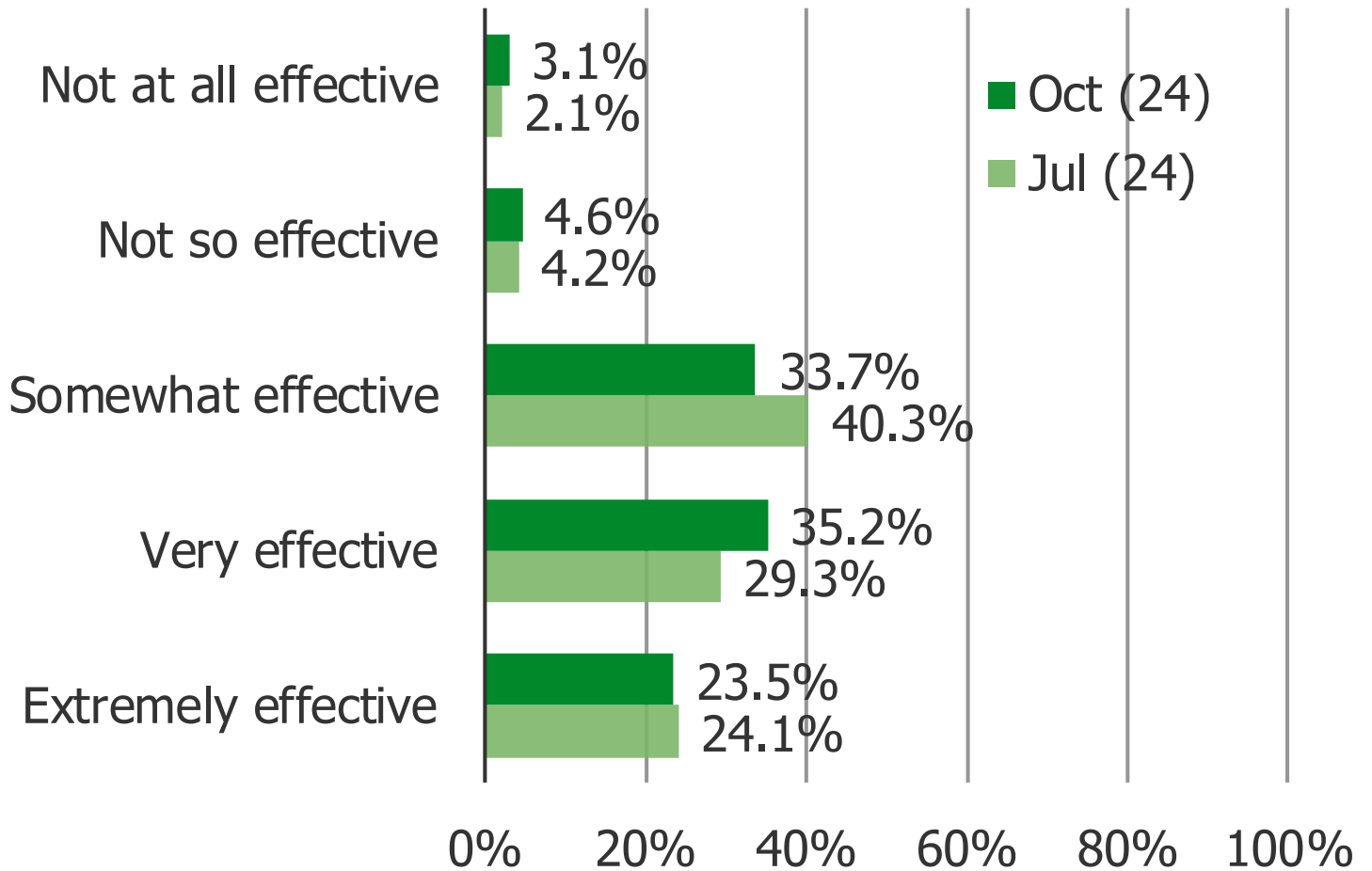
FOR WHICH TASKS DO YOU USE AI CHATBOTS AT WORK? SELECT ALL THAT APPLY

This question was posed to all respondents who use AI chatbots for work (N = 196)



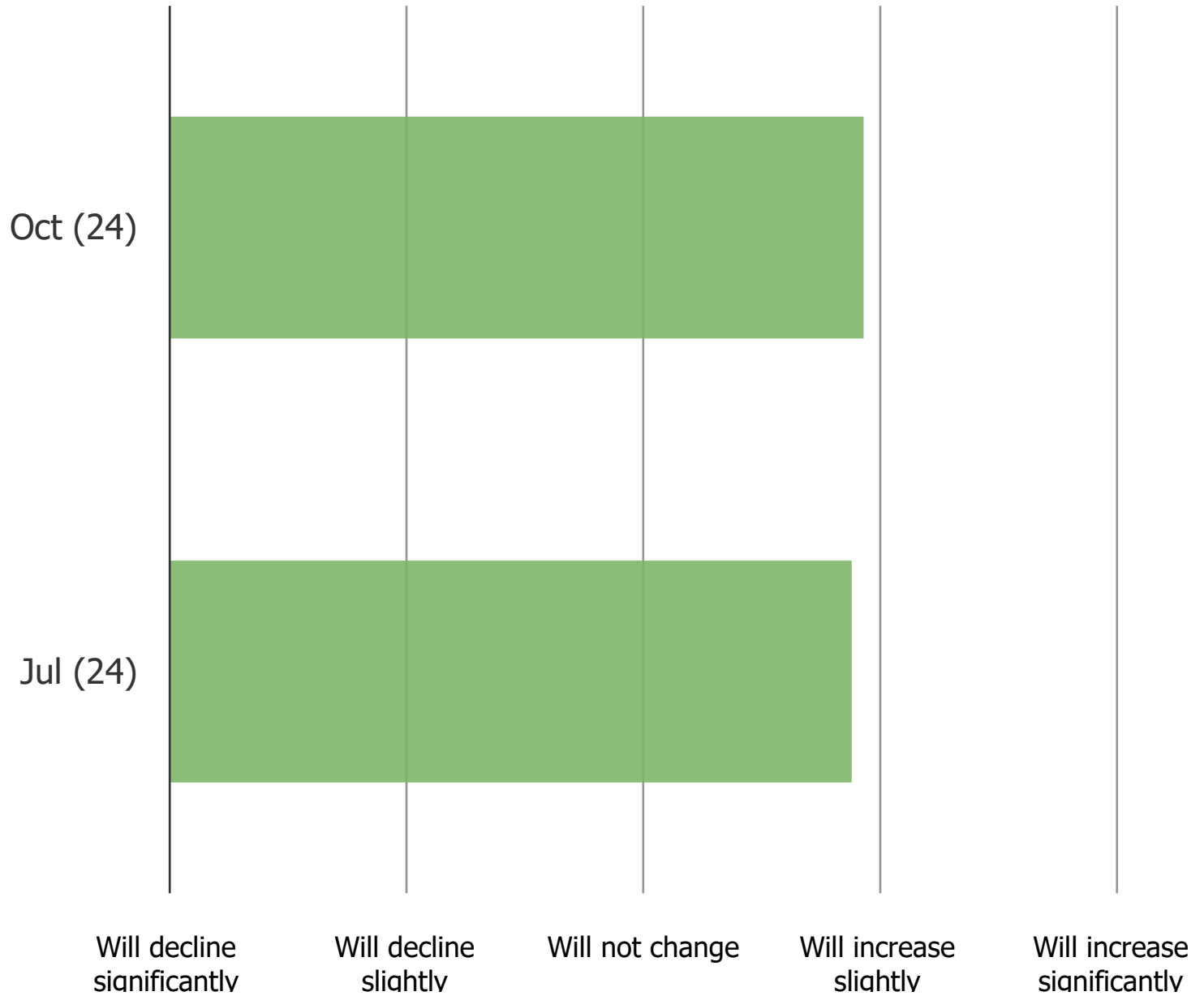
HOW EFFECTIVE ARE AI CHATBOTS IN COMPLETING THE TASKS YOU USE THEM FOR?

This question was posed to all respondents who use AI chatbots for work (N = 196)



DO YOU EXPECT HOW OFTEN YOU USE AI CHATBOTS AT WORK TO CHANGE GOING FORWARD?

This question was posed to all respondents who use AI chatbots for work (N = 196)





DO YOU HAVE ANY HOPES OR EXPECTATIONS FOR WHAT AI CHATBOTS OR APPS COULD BRING TO YOUR SMARTPHONE AND COMPUTER DEVICES IN THE FUTURE?

This question was posed to all respondents.

### Summary of Fill-In Sentiments:

- Many respondents simply replied no, or not really.
- There were a number of respondents who were either scared of what AI can become or expressed caution toward it.
- A number of respondents think it will make life easier for them, help them complete tasks easier, or improve their lives in general.
- There were a number of respondents who expressed excitement about what it might not be able to do, without knowing exactly what it will do for them.

WHY DO YOU CHOOSE TO USE AN IPHONE OVER OTHER SMARTPHONE OPTIONS?

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



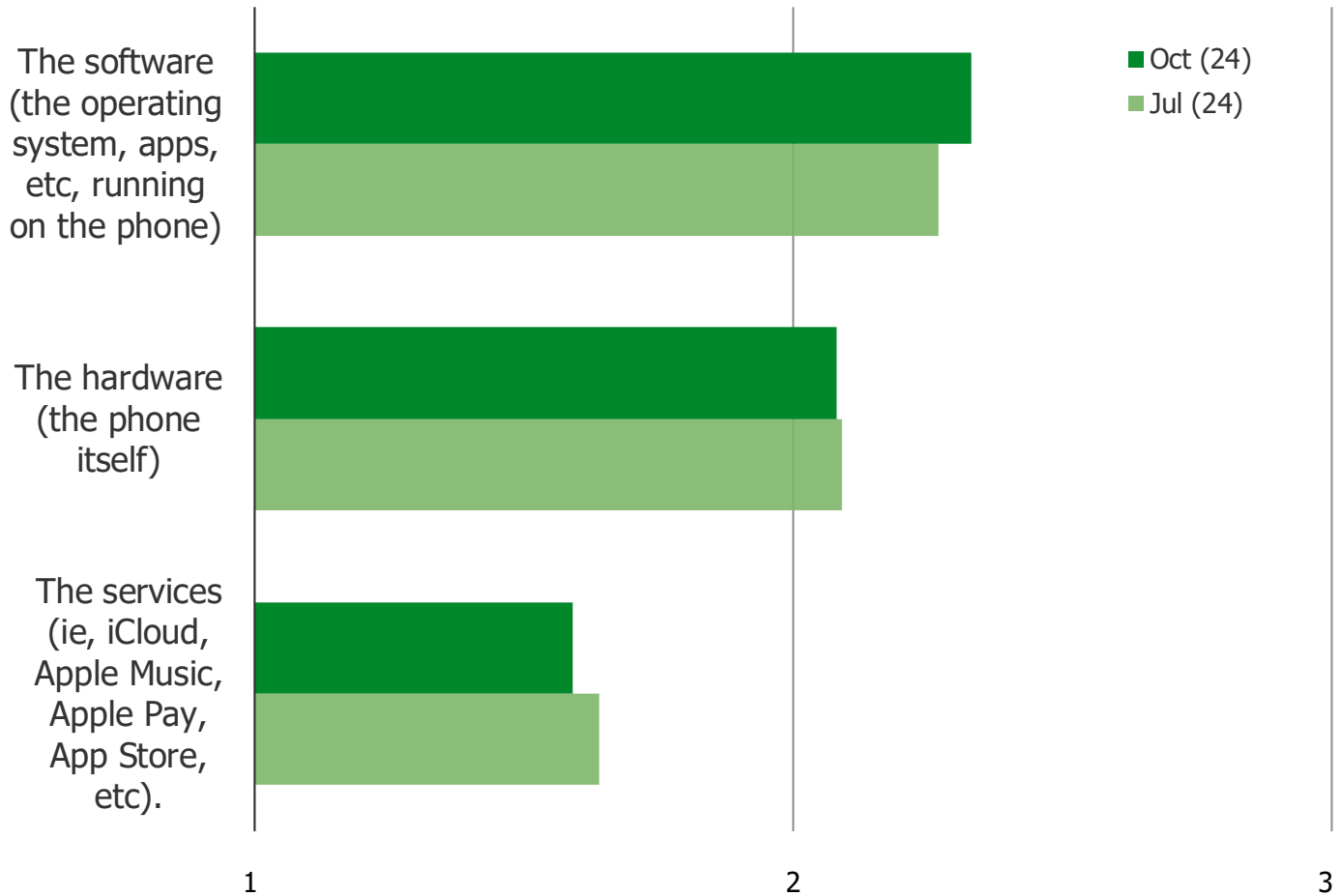
WHEN YOU GET A NEW IPHONE, WHAT IS TYPICALLY THE MAIN REASON FOR WHY YOU DECIDED TO GET A NEW IPHONE?

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



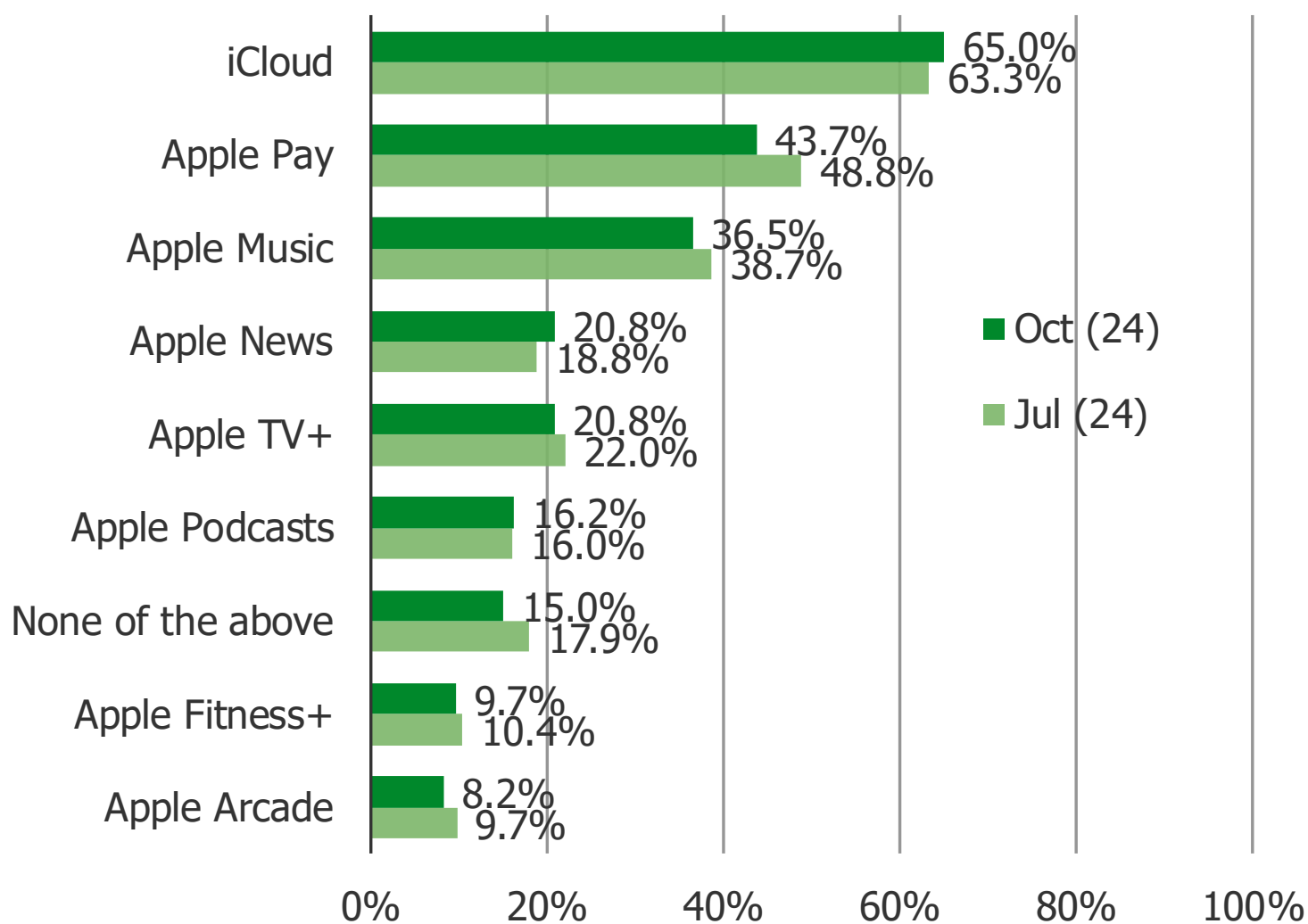
PLEASE RANK FOLLOWING IN IMPORTANCE OF WHAT DRAWS YOU TO THE APPLE ECOSYSTEM, WITH THE MOST IMPORTANT AT THE TOP?

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



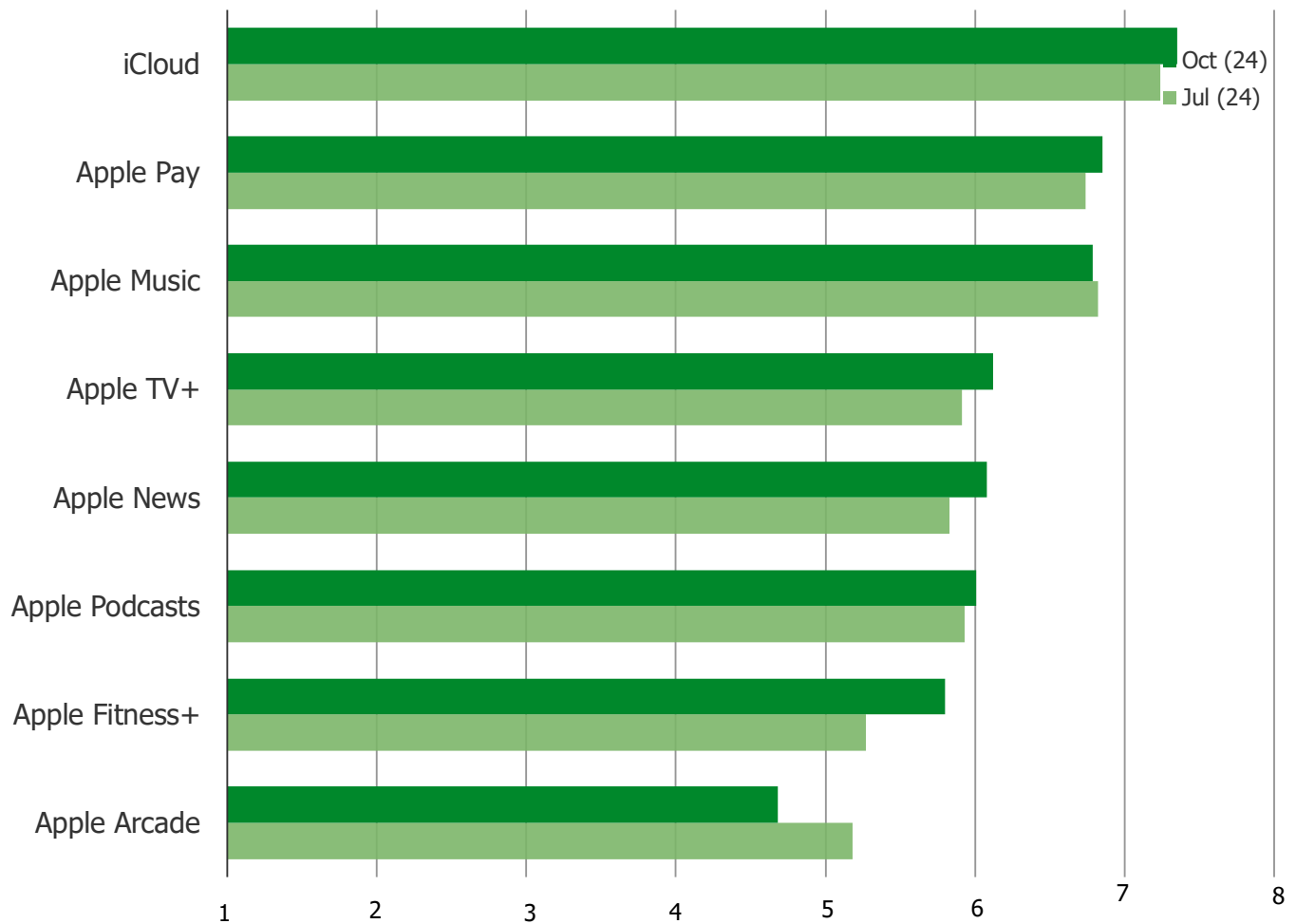
WHICH OF THE FOLLOWING APPLE SERVICES DO YOU USE? SELECT ALL THAT APPLY

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



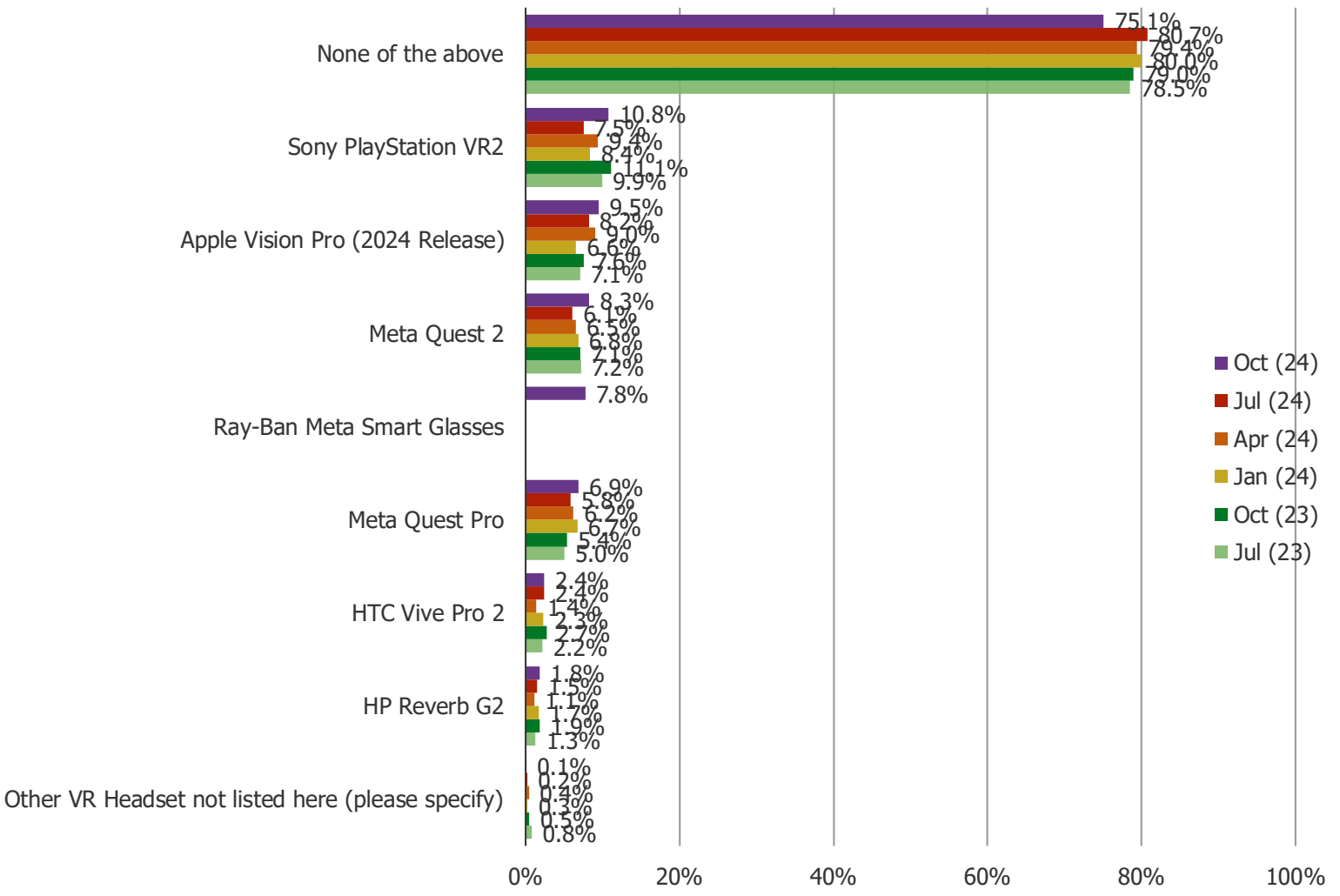
PLEASE RANK THE FOLLOWING APPLE SERVICES IN ORDER OF IMPORTANCE TO YOU, WITH THE MOST IMPORTANT AT THE TOP TO THE LEAST IMPORTANT AT THE BOTTOM.

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



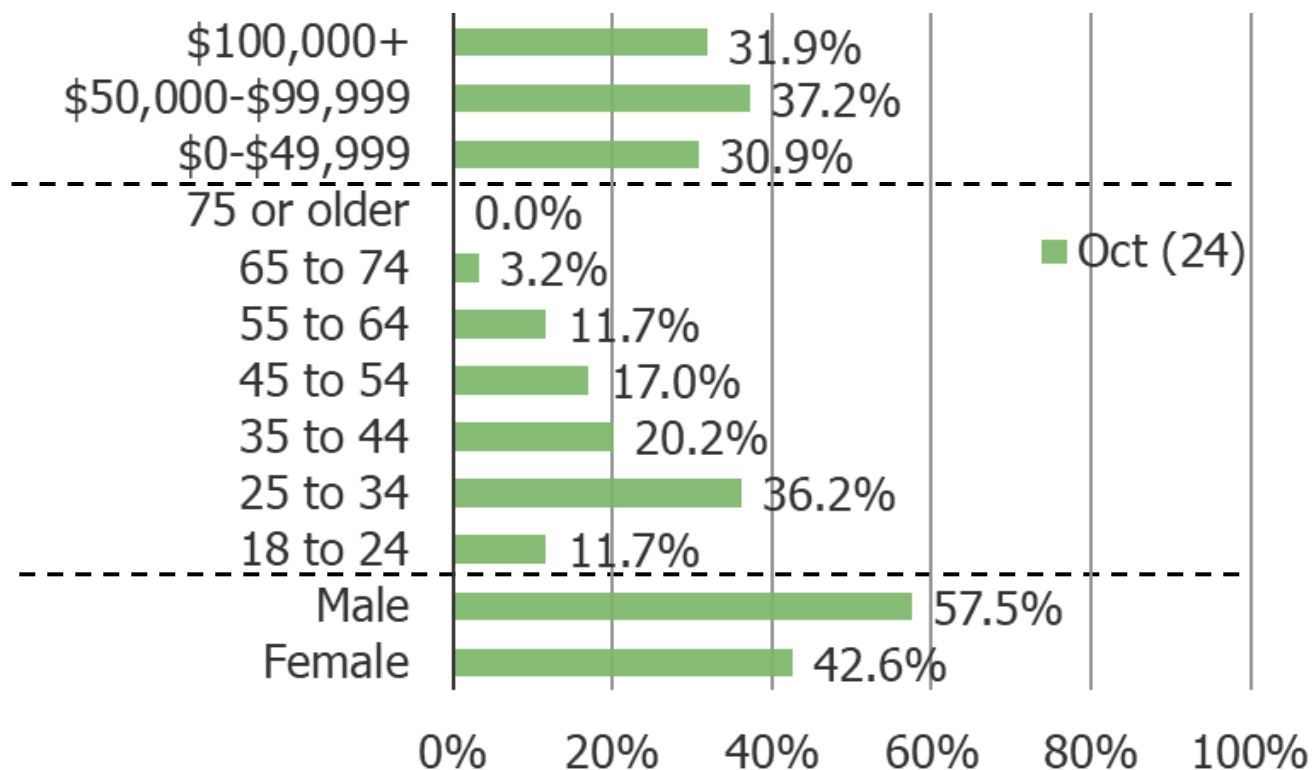
DO YOU HAVE ANY INTEREST IN THE FOLLOWING PRODUCTS? SELECT ALL THAT APPLY

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 = 94)



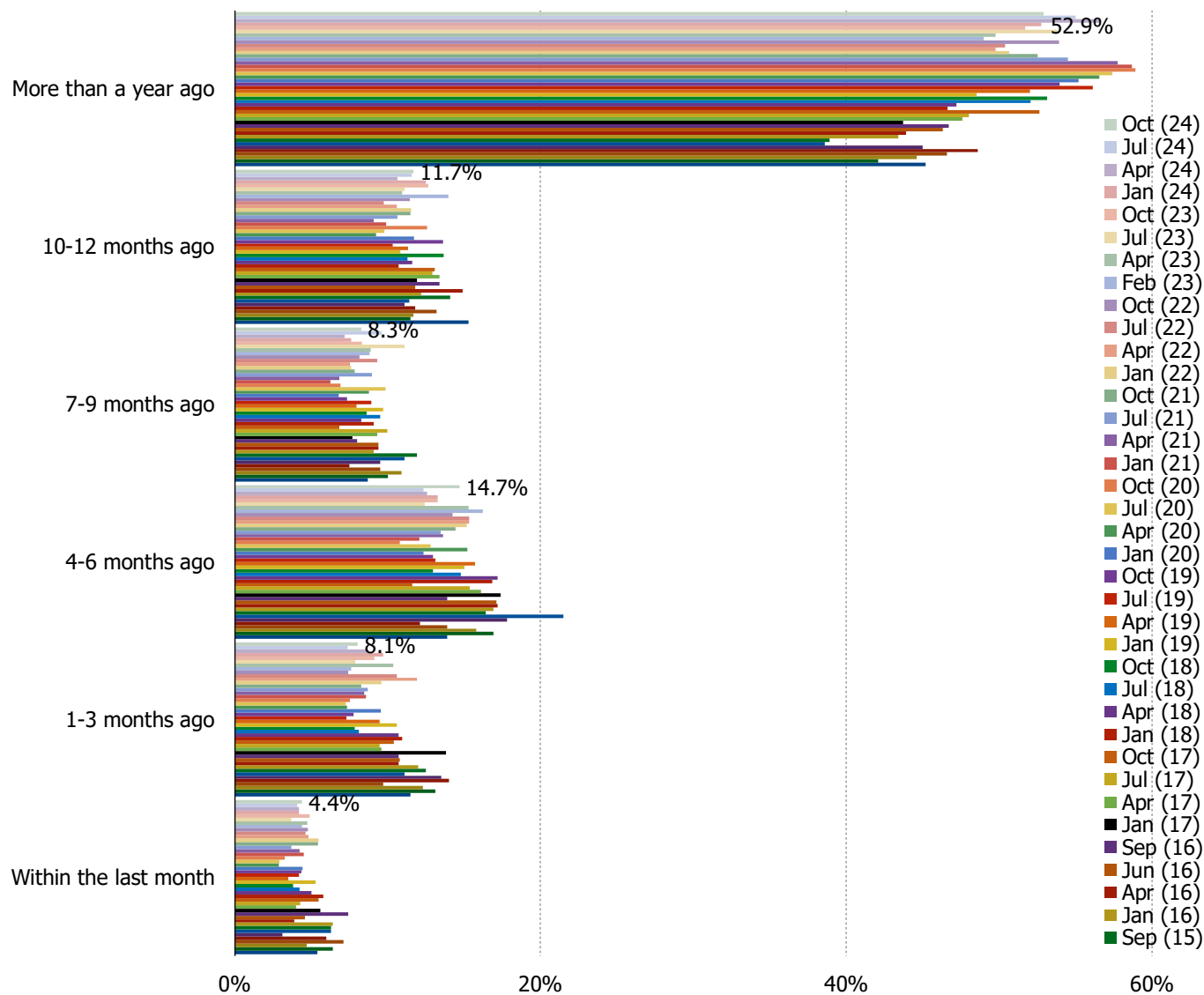


# SMARTPHONE REFRESH CYCLES

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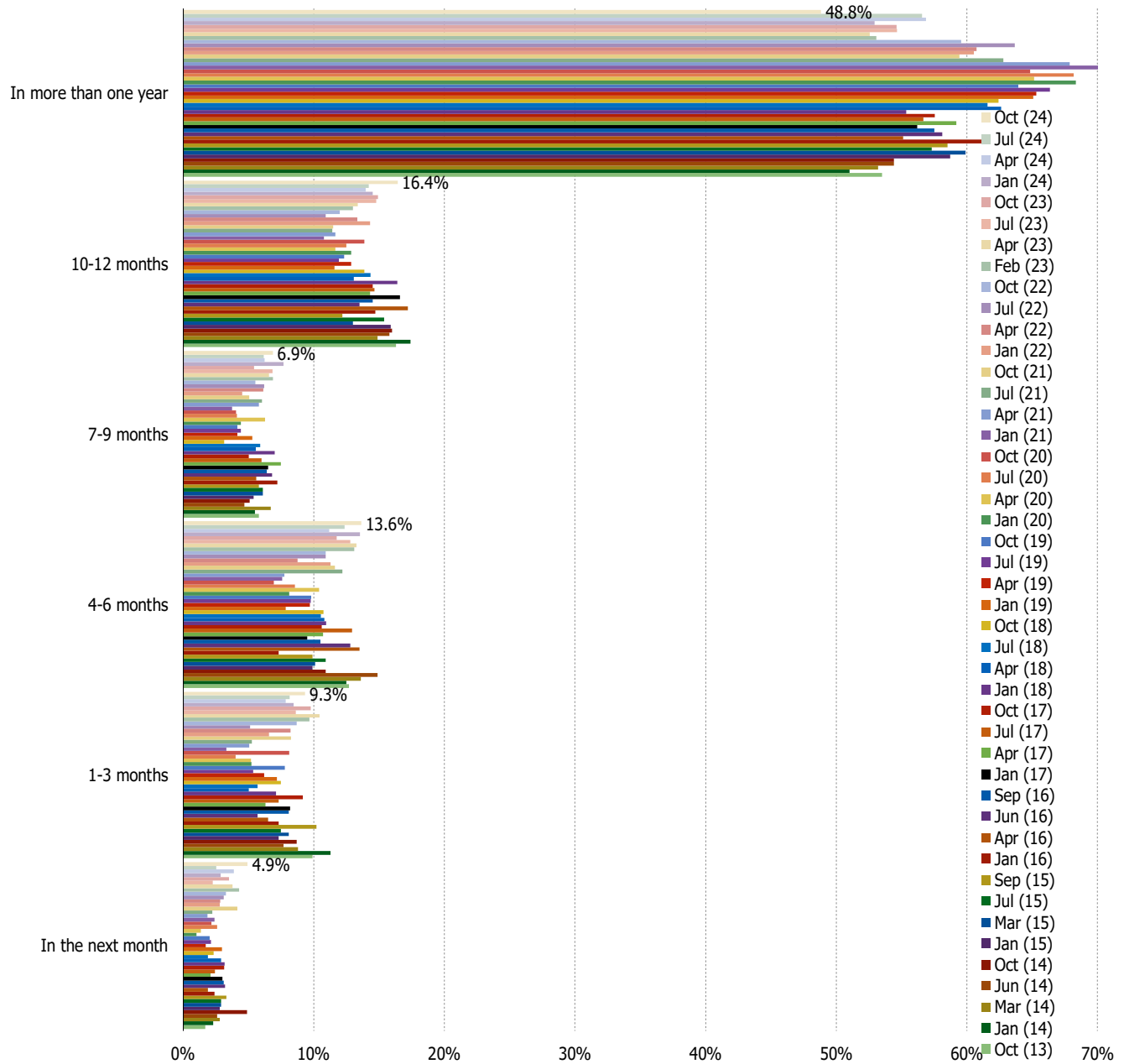
WHEN DID YOU GET YOUR CURRENT SMARTPHONE?

This question was posed to smartphone owners.



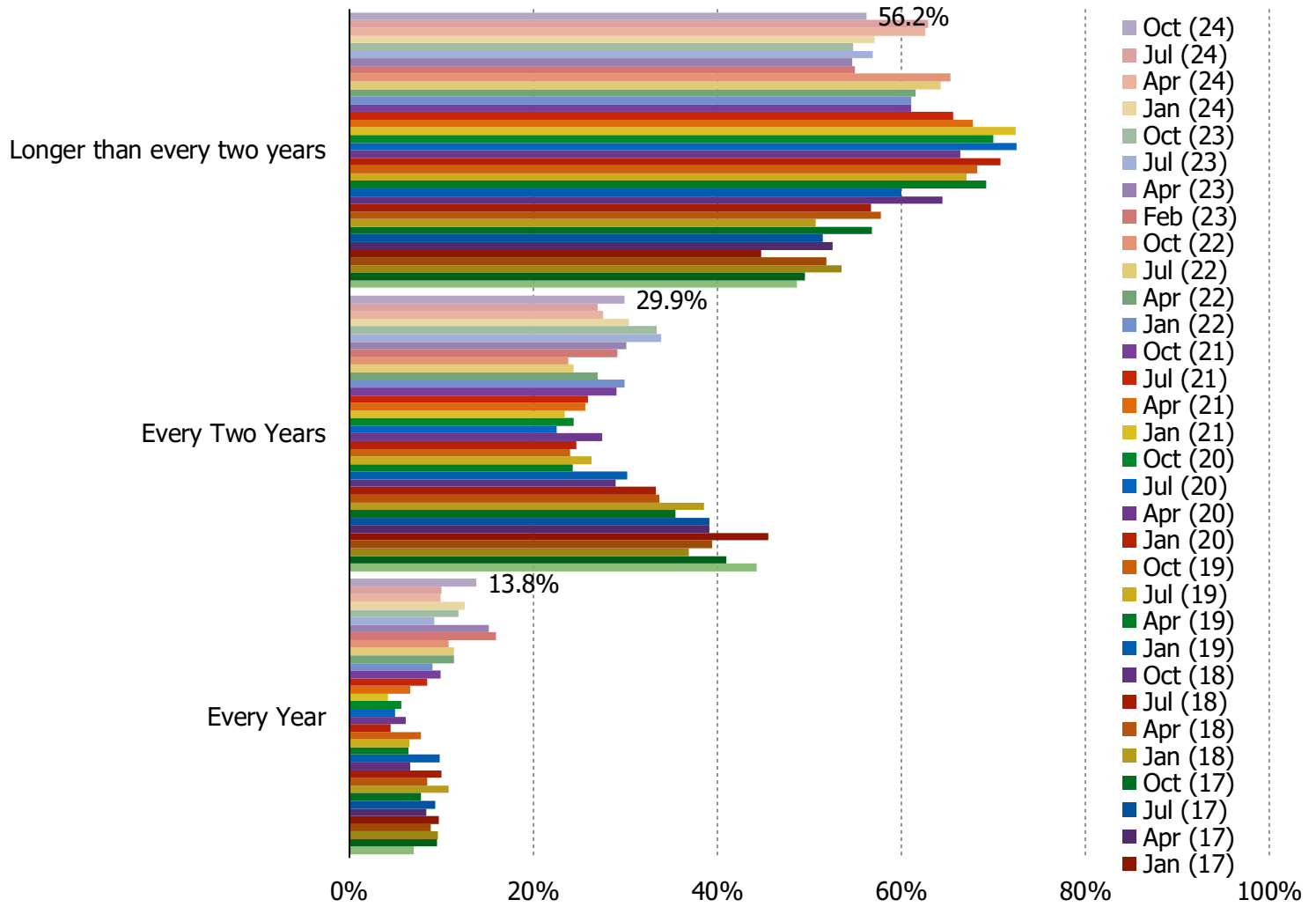
EXPECTED DATE OF NEXT SMARTPHONE PURCHASE

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.

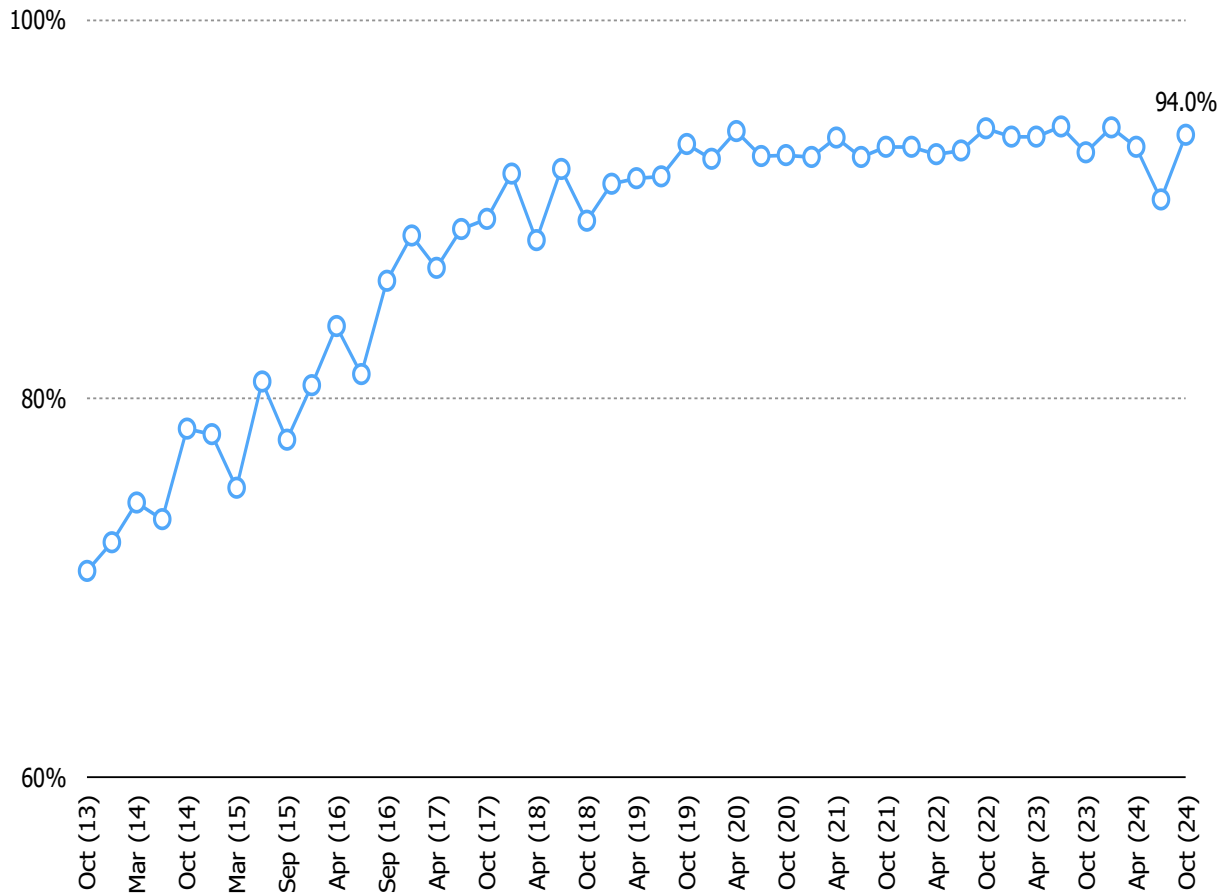


# SMARTPHONE MARKET SHARE

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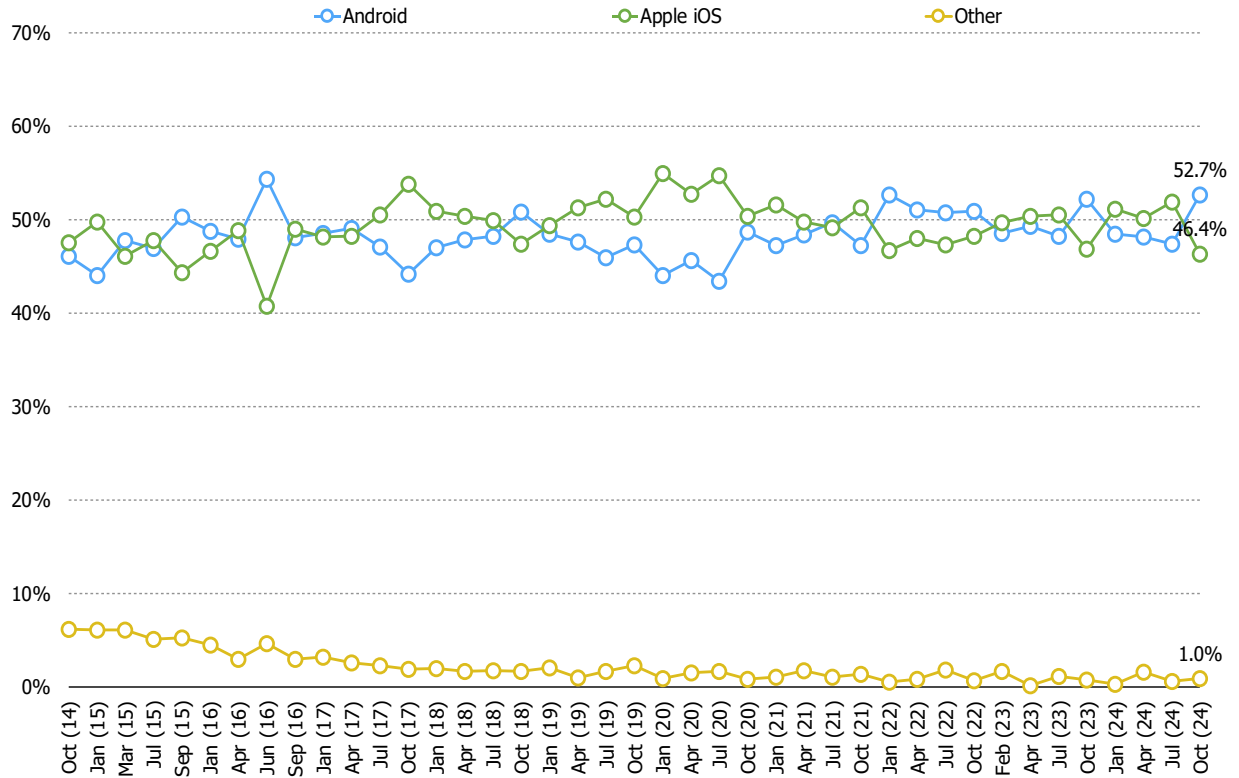
DO YOU OWN A SMARTPHONE?

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)?

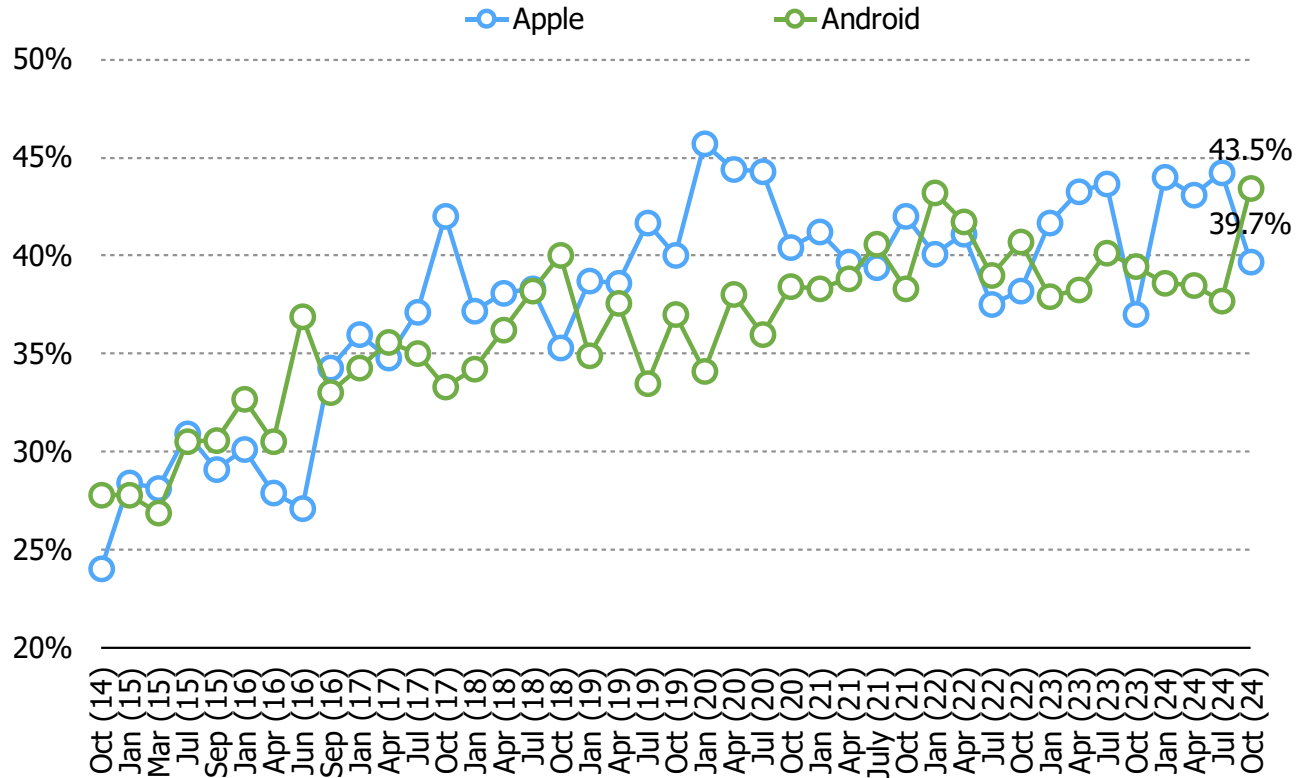
This question was posed to Android owners.





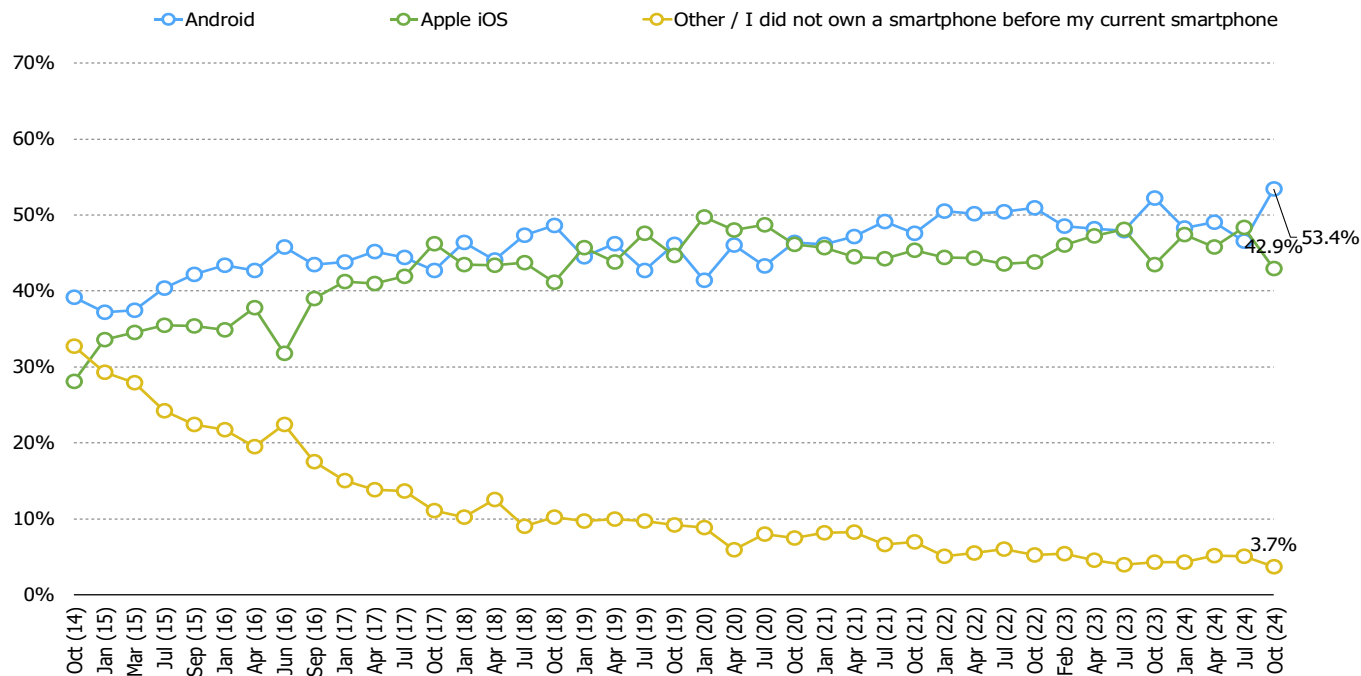
“TRIPLE PLAYS” – PERCENTAGE OF SMARTPHONE OWNERS WHO OWN THE SAME OPERATING SYSTEM FOR LAST PHONE, CURRENT PHONE, AND PLAN TO USE SAME FOR NEXT PHONE

This question was posed to smartphone owners.



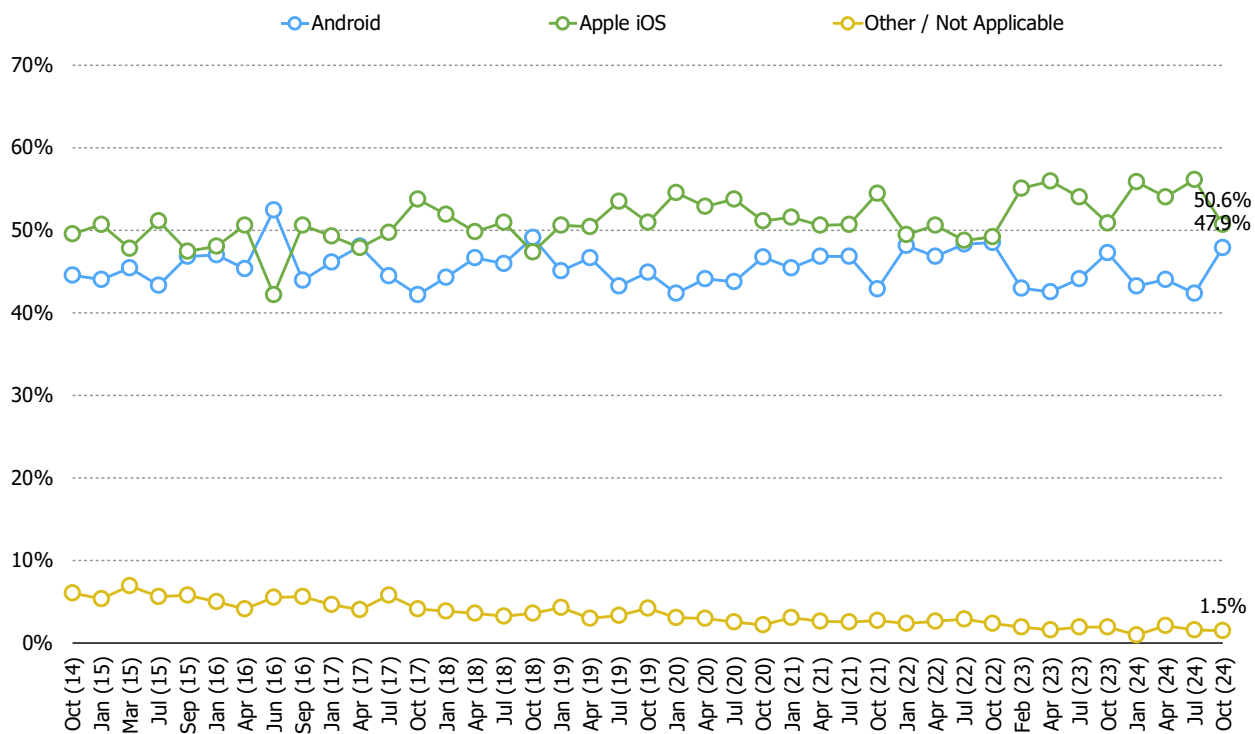
OPERATING SYSTEM FOR SMARTPHONE BEFORE CURRENT SMARTPHONE

This question was posed to smartphone owners.



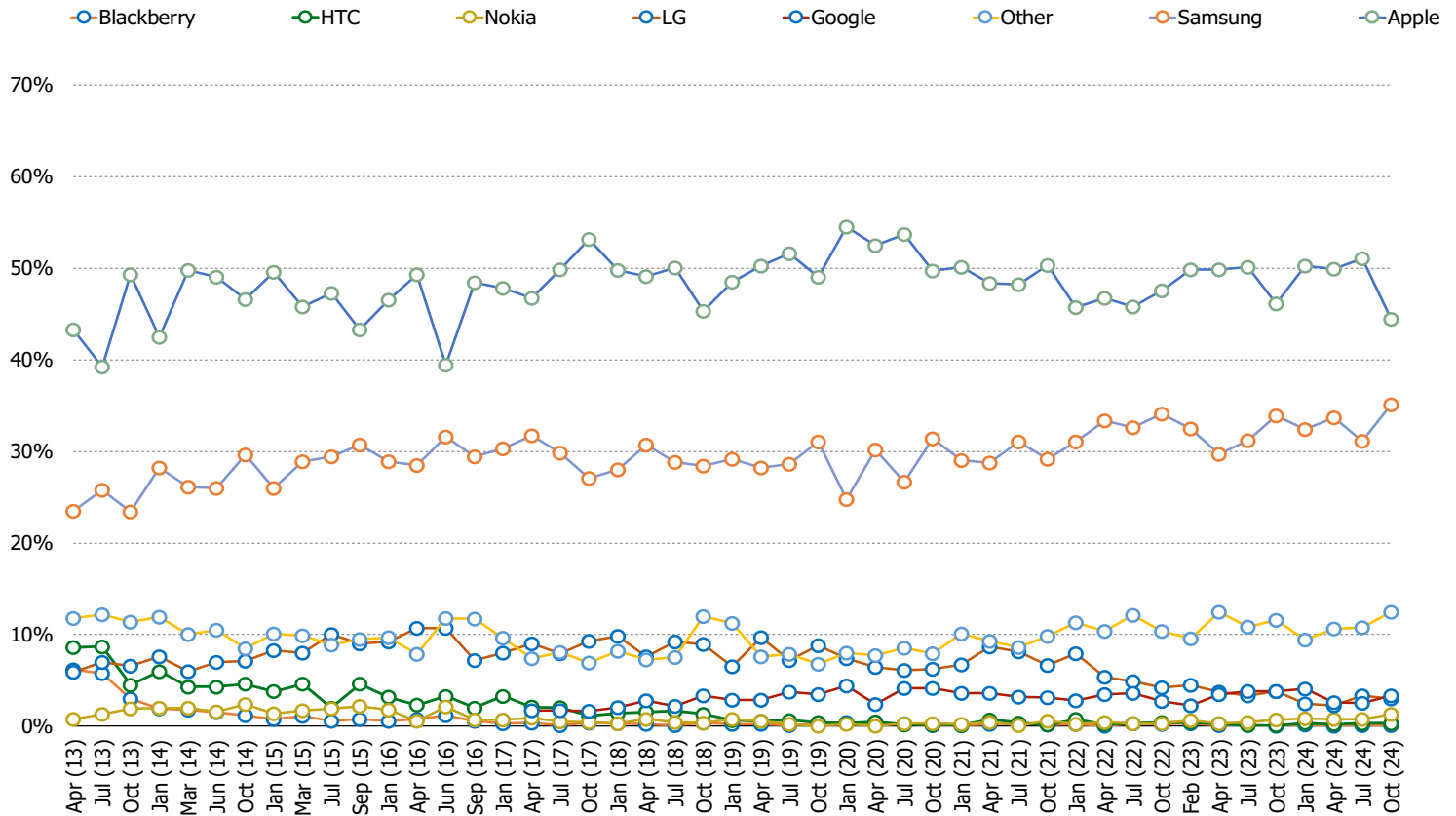
OPERATING SYSTEM FOR NEXT SMARTPHONE

This question was posed to smartphone owners.



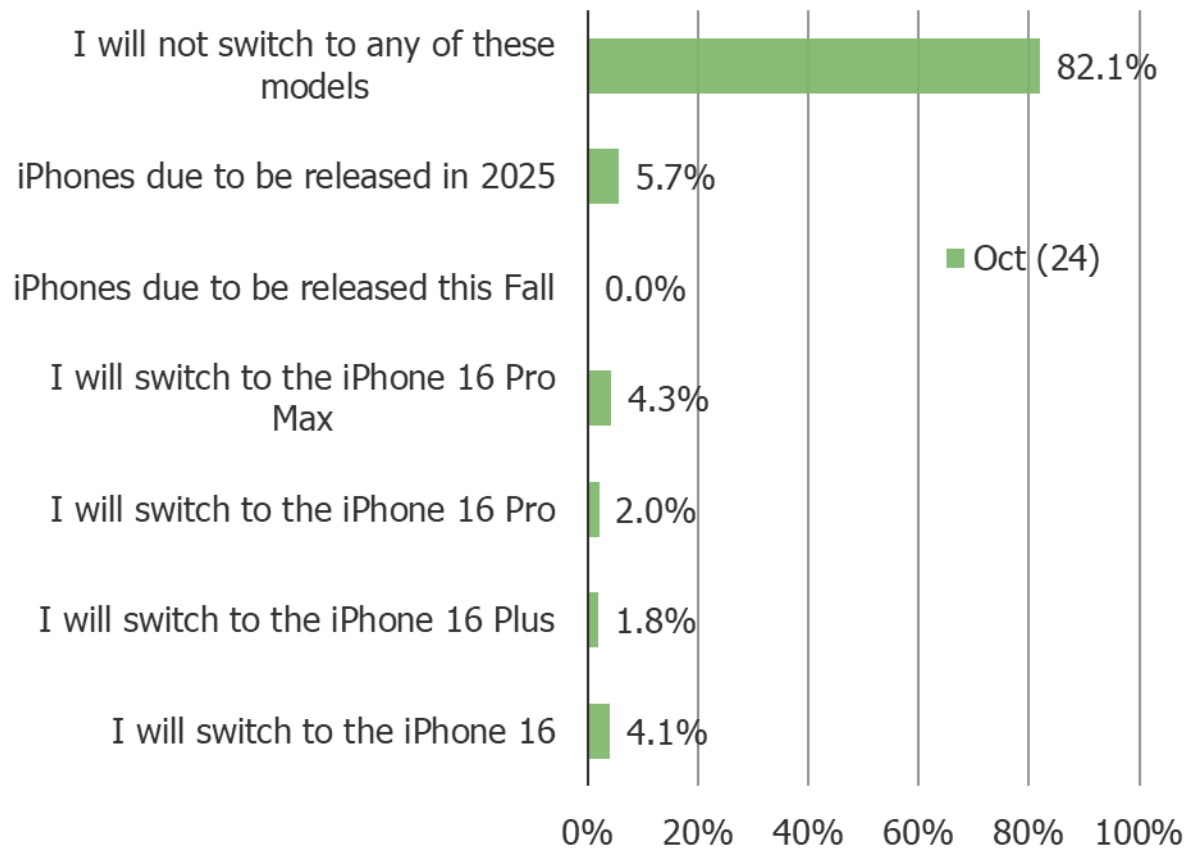
MARKET SHARE - SMARTPHONES

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.

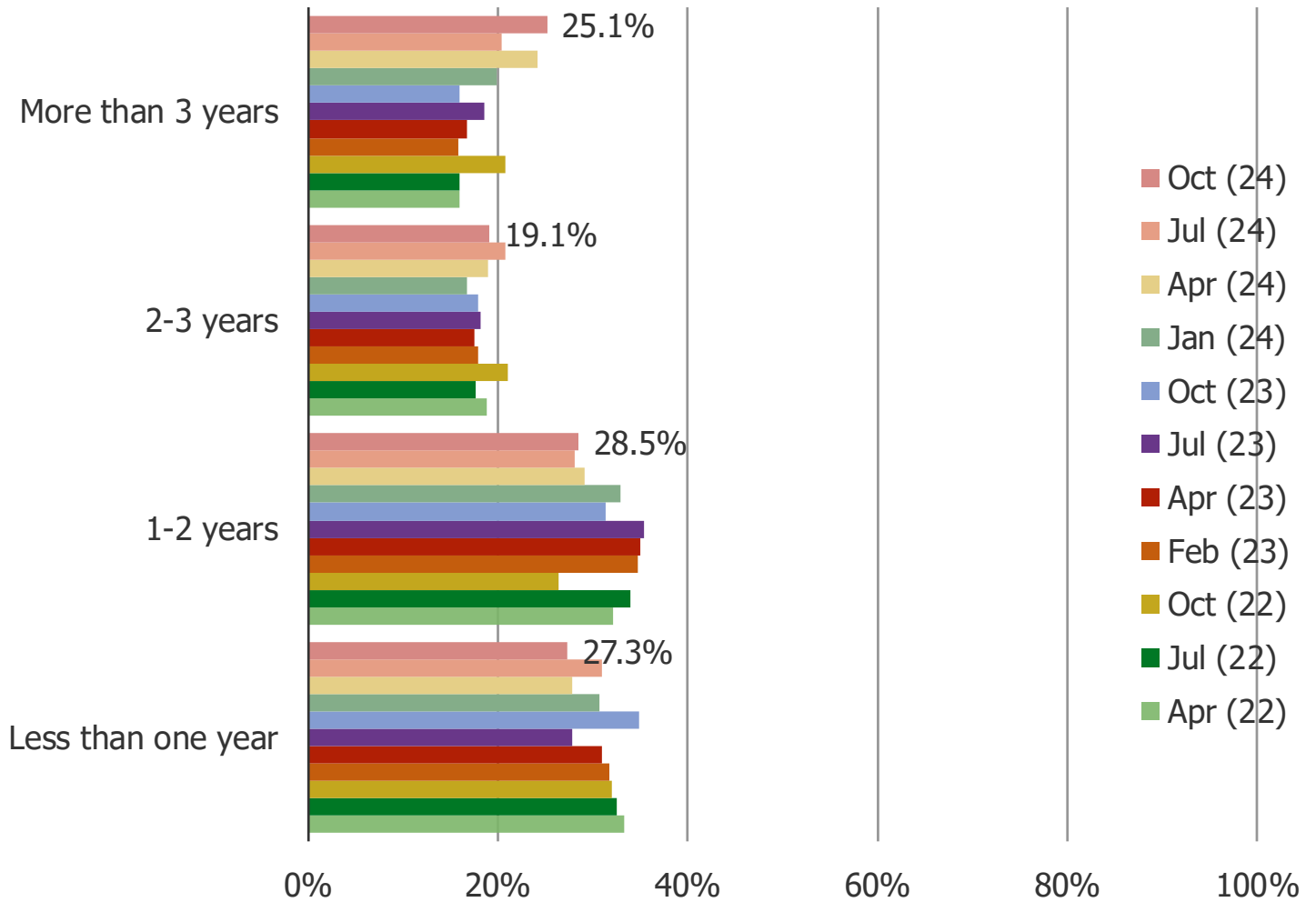


# IPHONE PURCHASE PREFERENCES AND TESTING A LEASING MODEL

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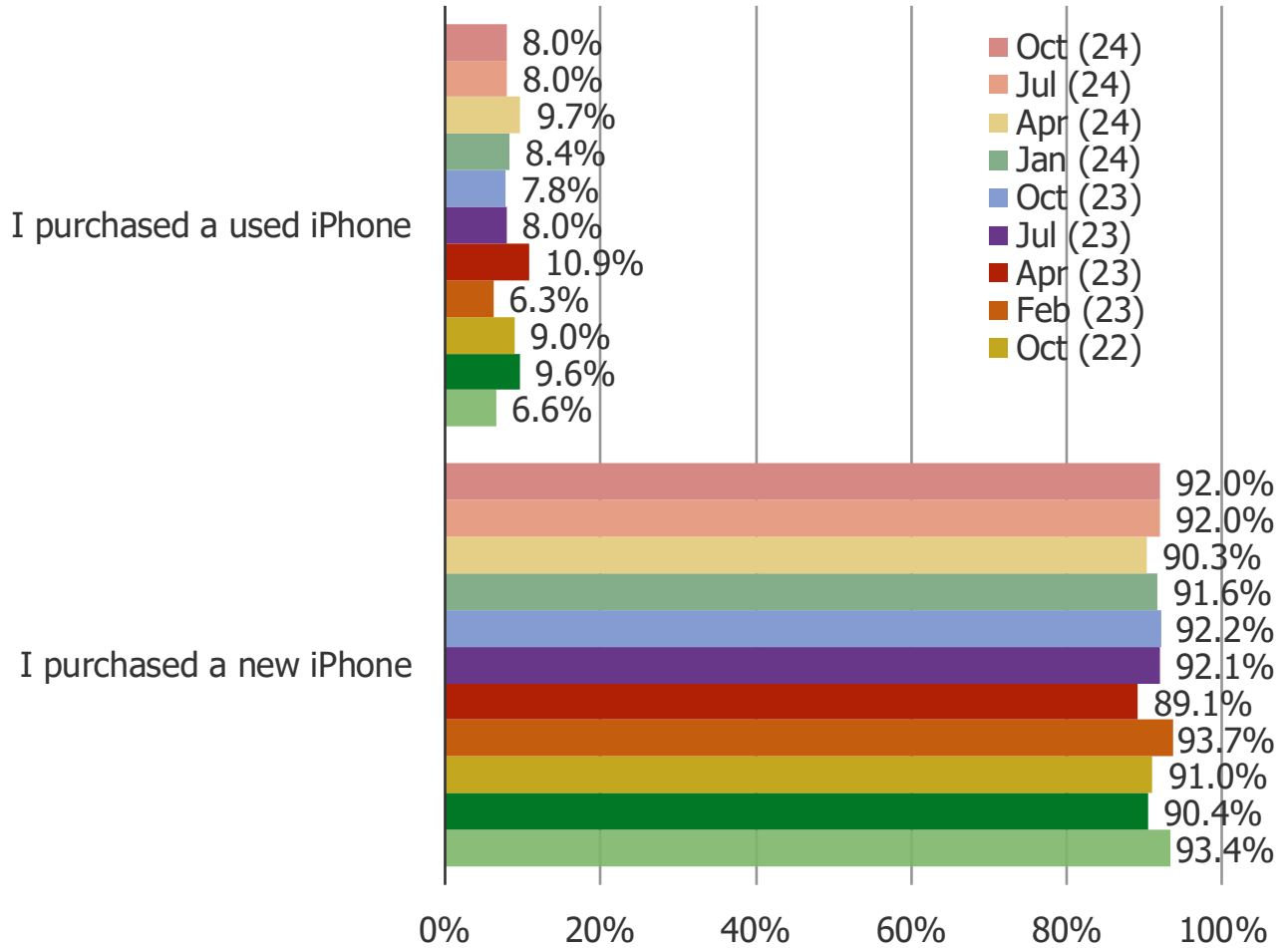
FOR HOW LONG HAVE YOU OWNED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



HOW DID YOU PURCHASE YOUR IPHONE?

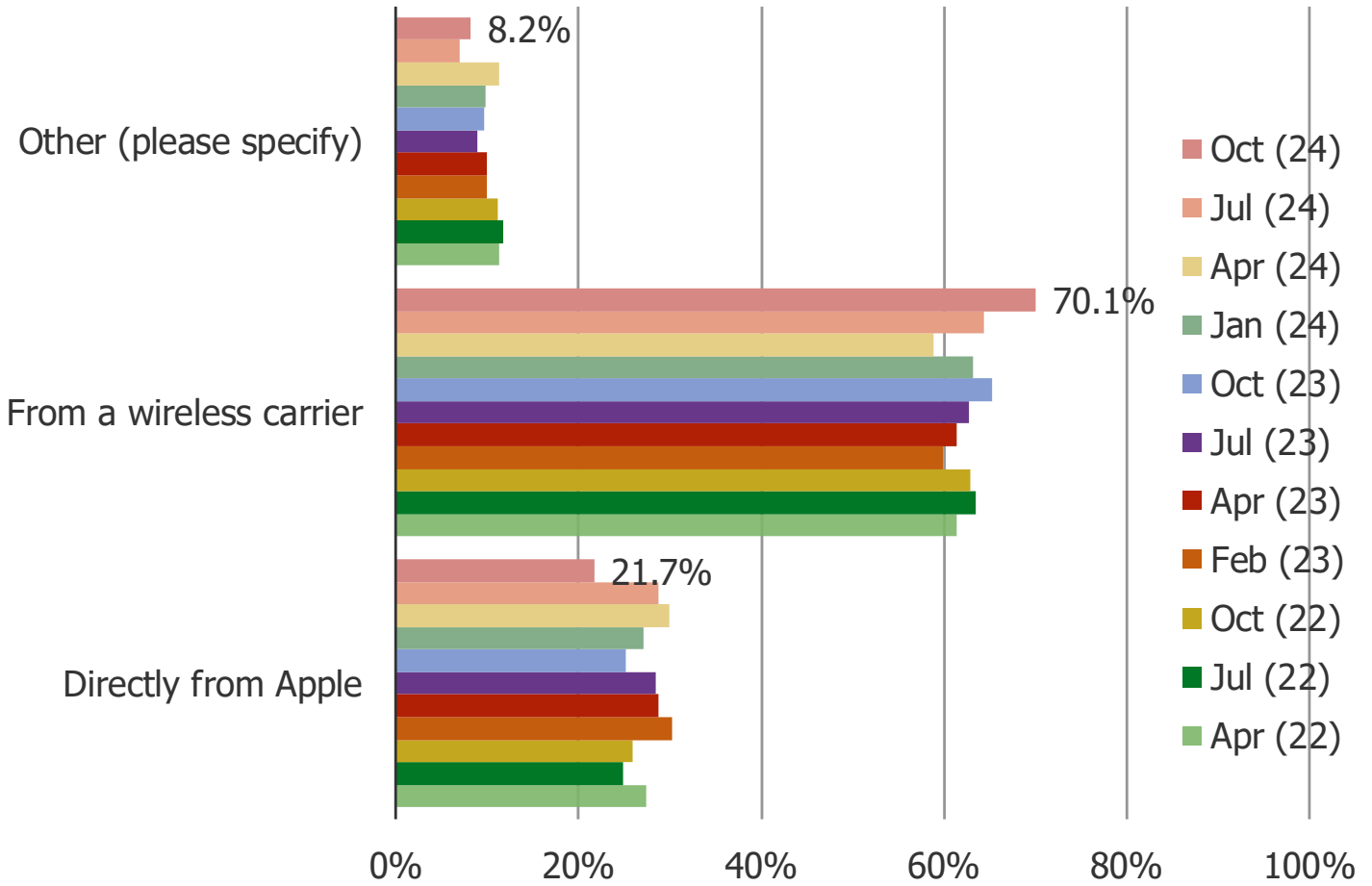
This question was posed to iPhone owners.





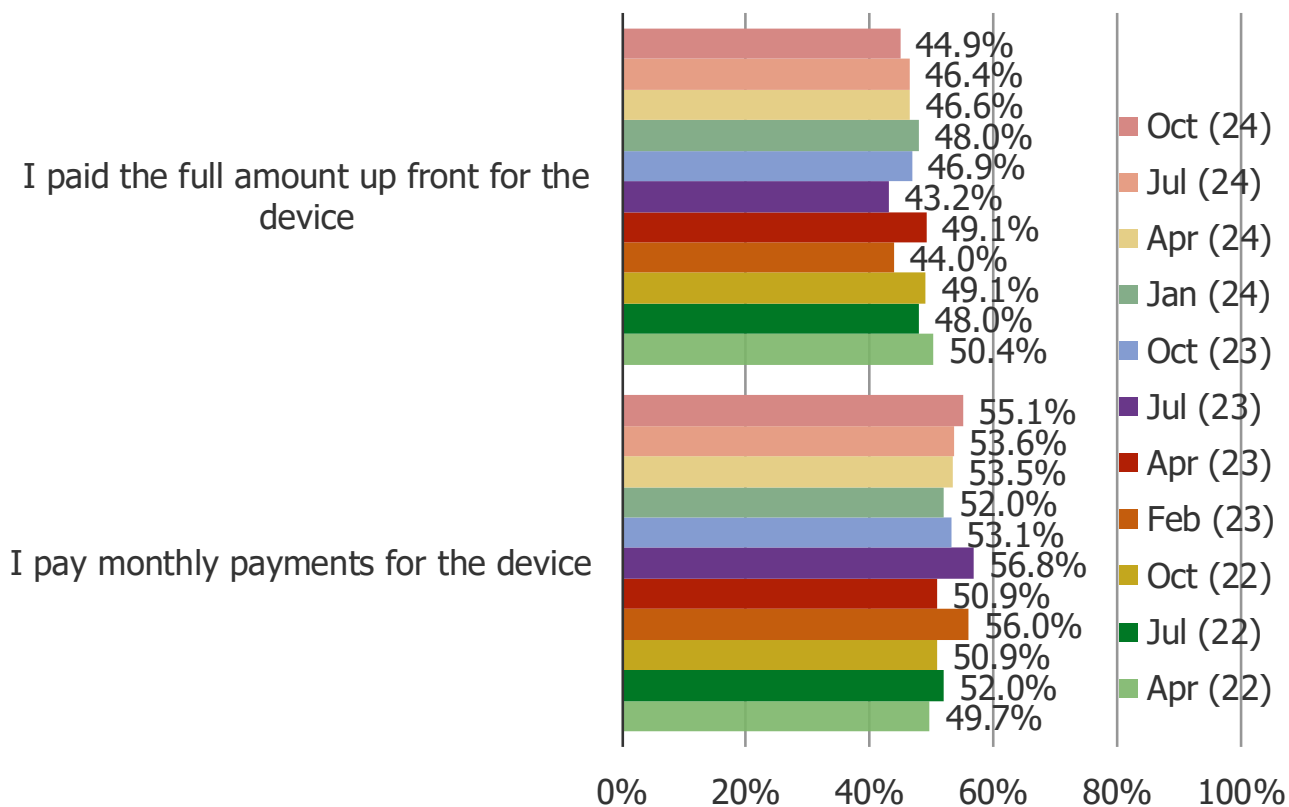
HOW DID YOU PURCHASE YOUR CURRENT IPHONE?

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.

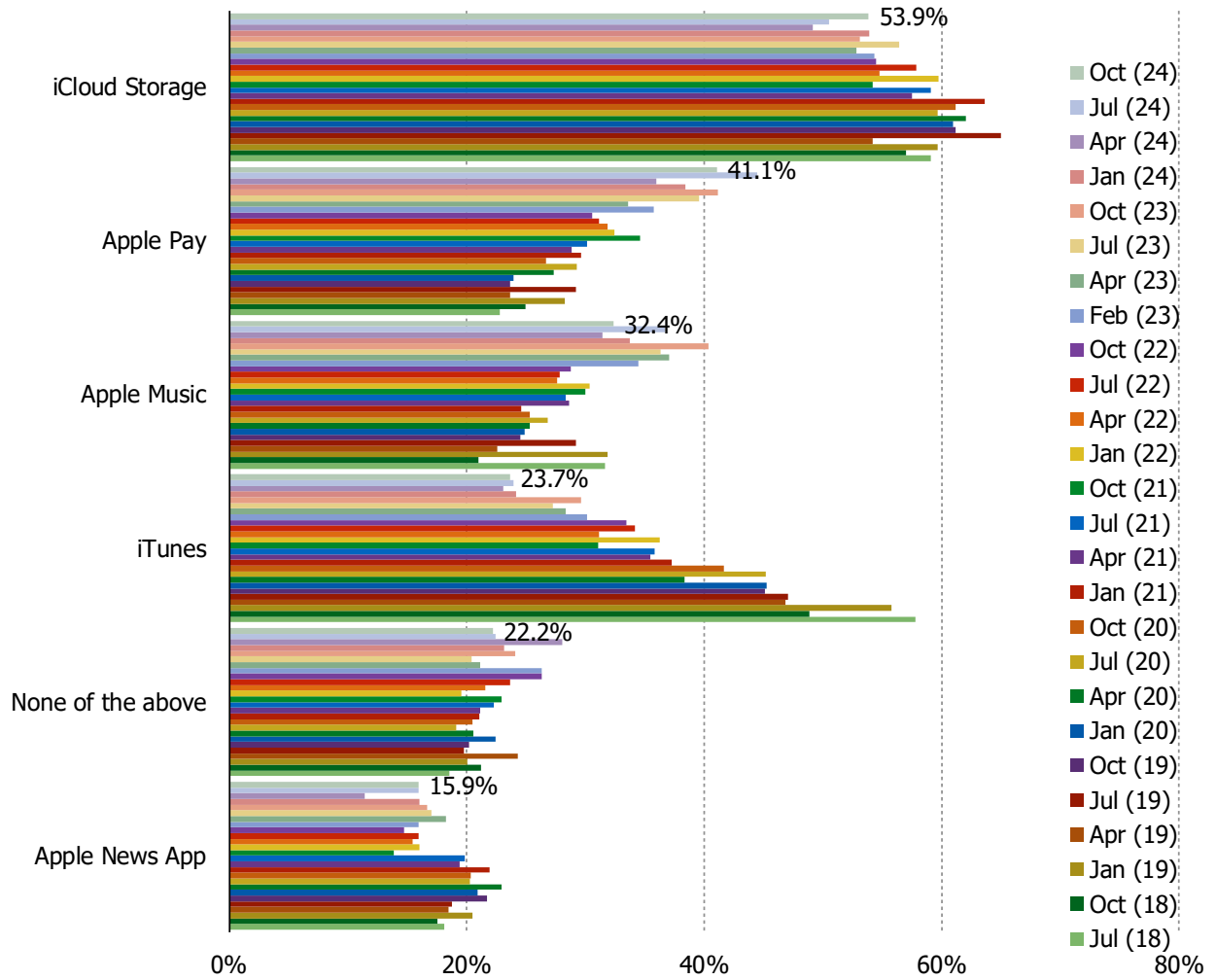


# AAPL PAY QUESTIONS

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

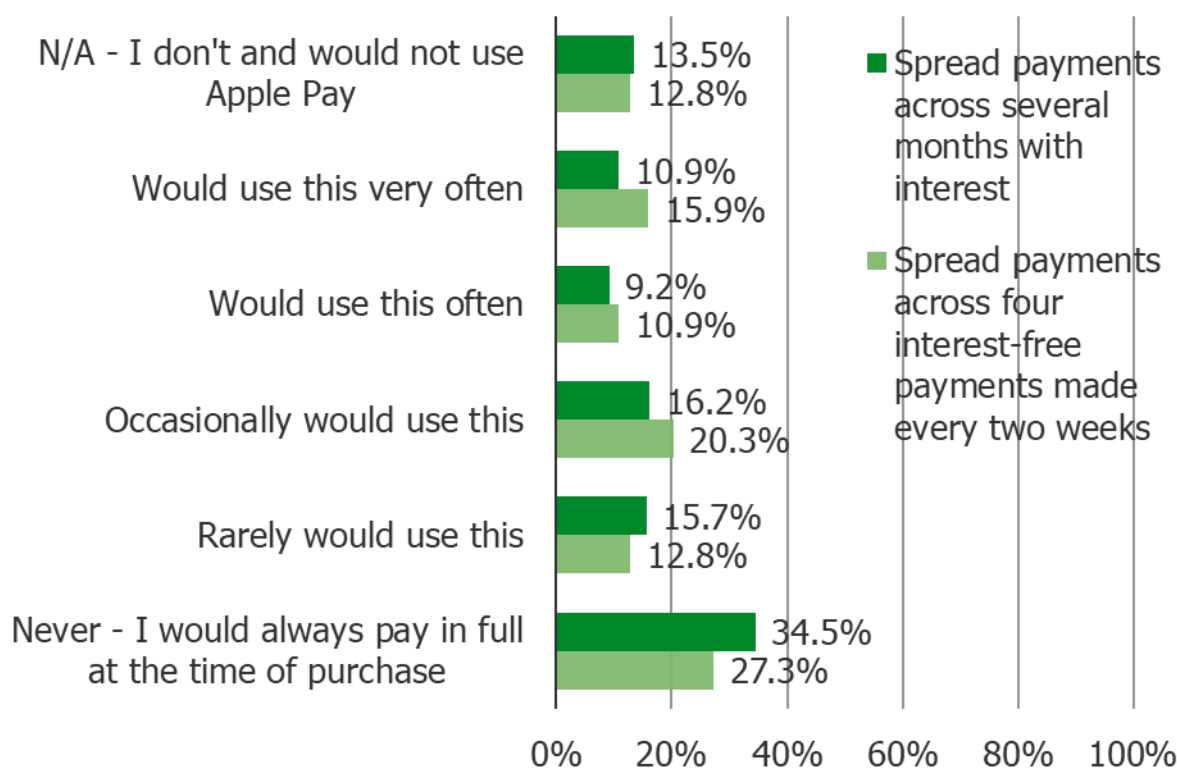
This question was posed to iPhone owners.



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.

## OCTOBER 2024

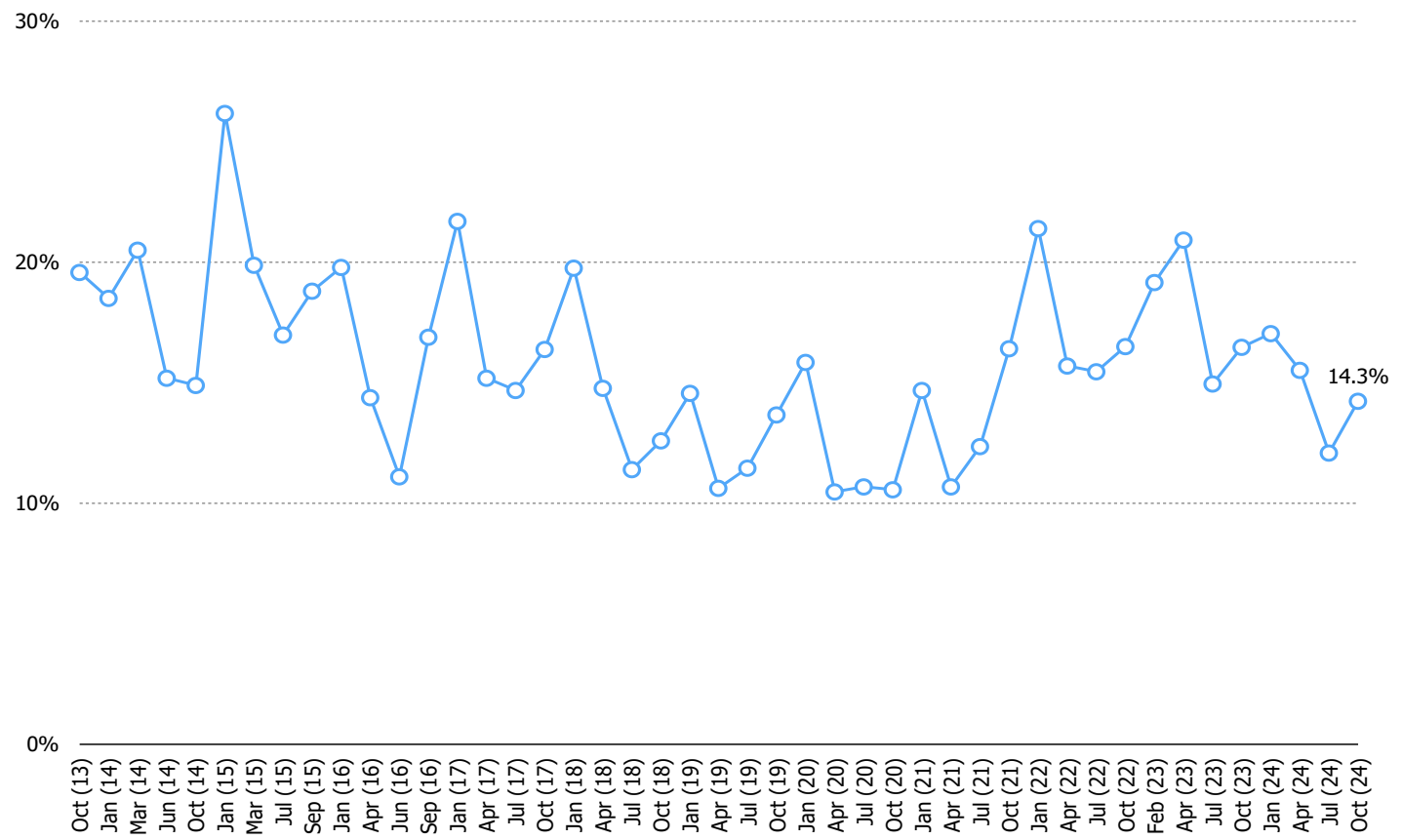


# IPHONE DYNAMICS

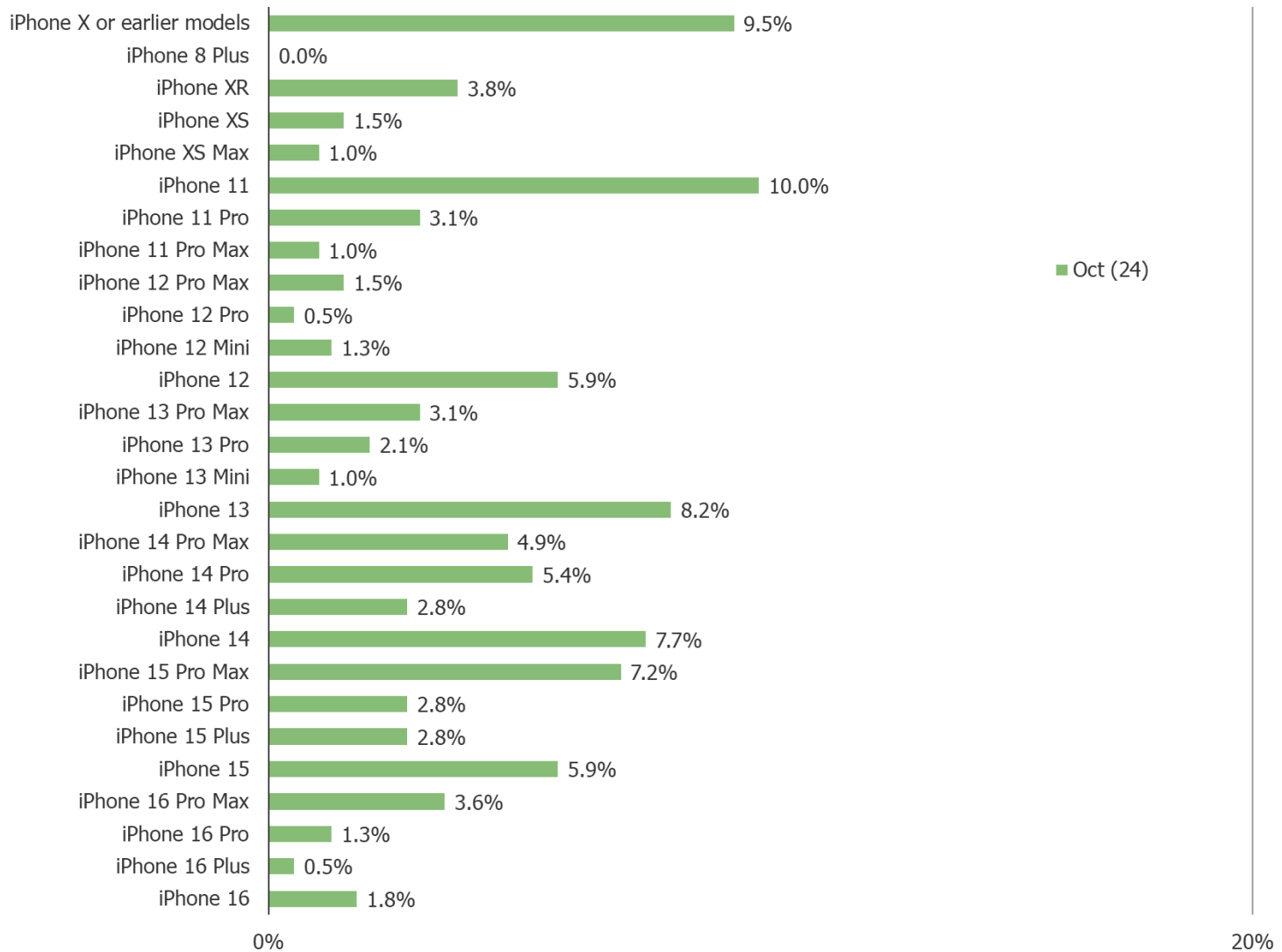
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GOT IPHONE WITHIN PAST THREE MONTHS

This question was posed to iPhone owners.



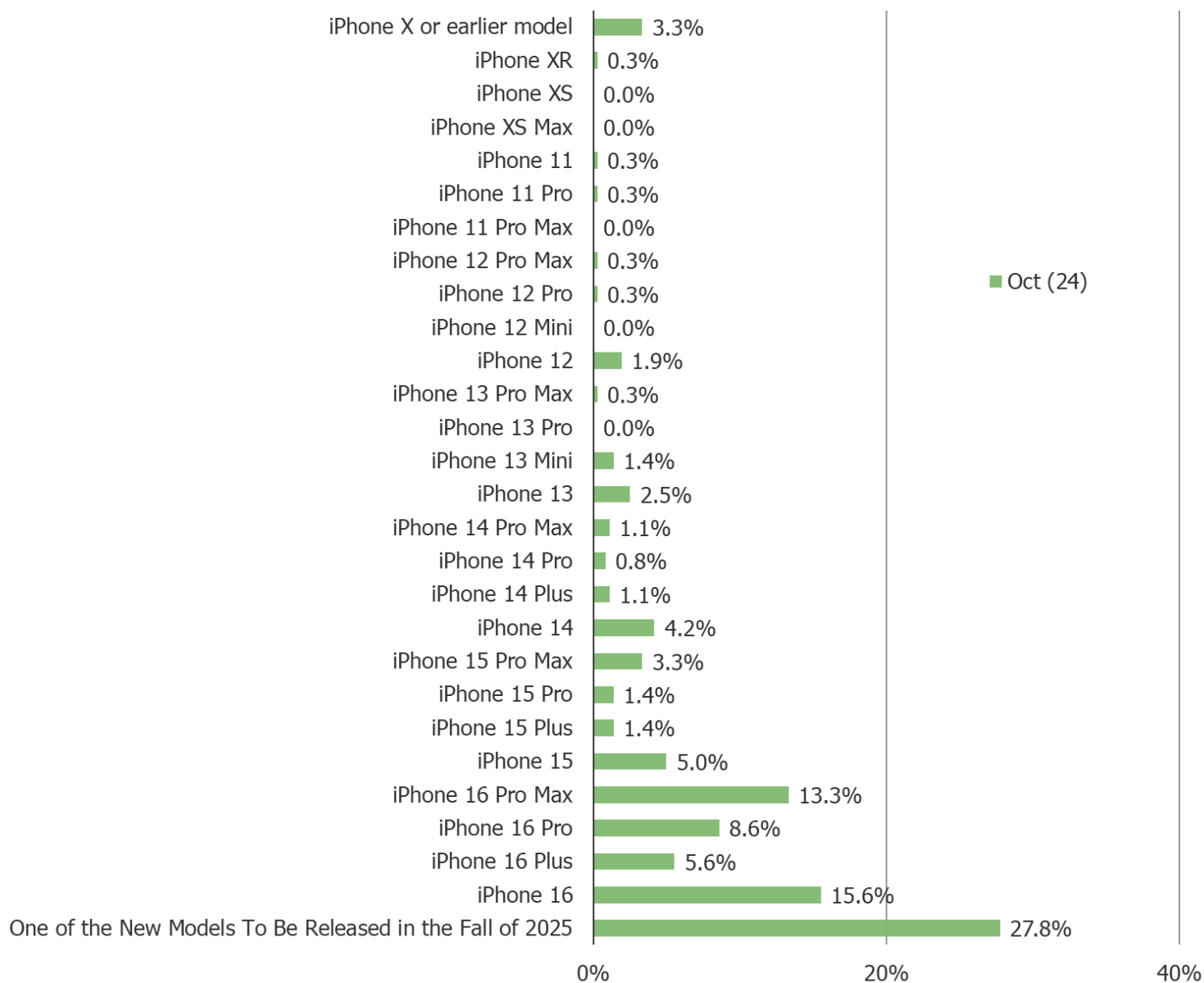
IPHONE MIX – WHICH MODEL DO YOU CURRENTLY OWN?





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.

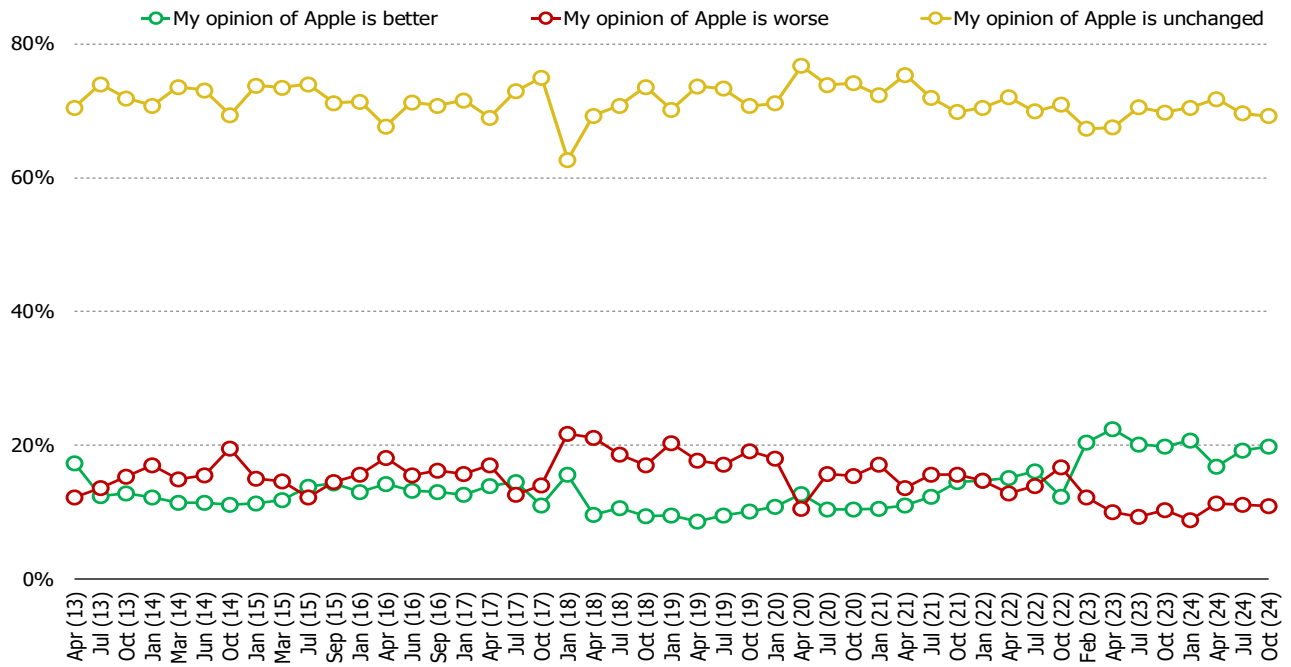


# CONSUMER SENTIMENT

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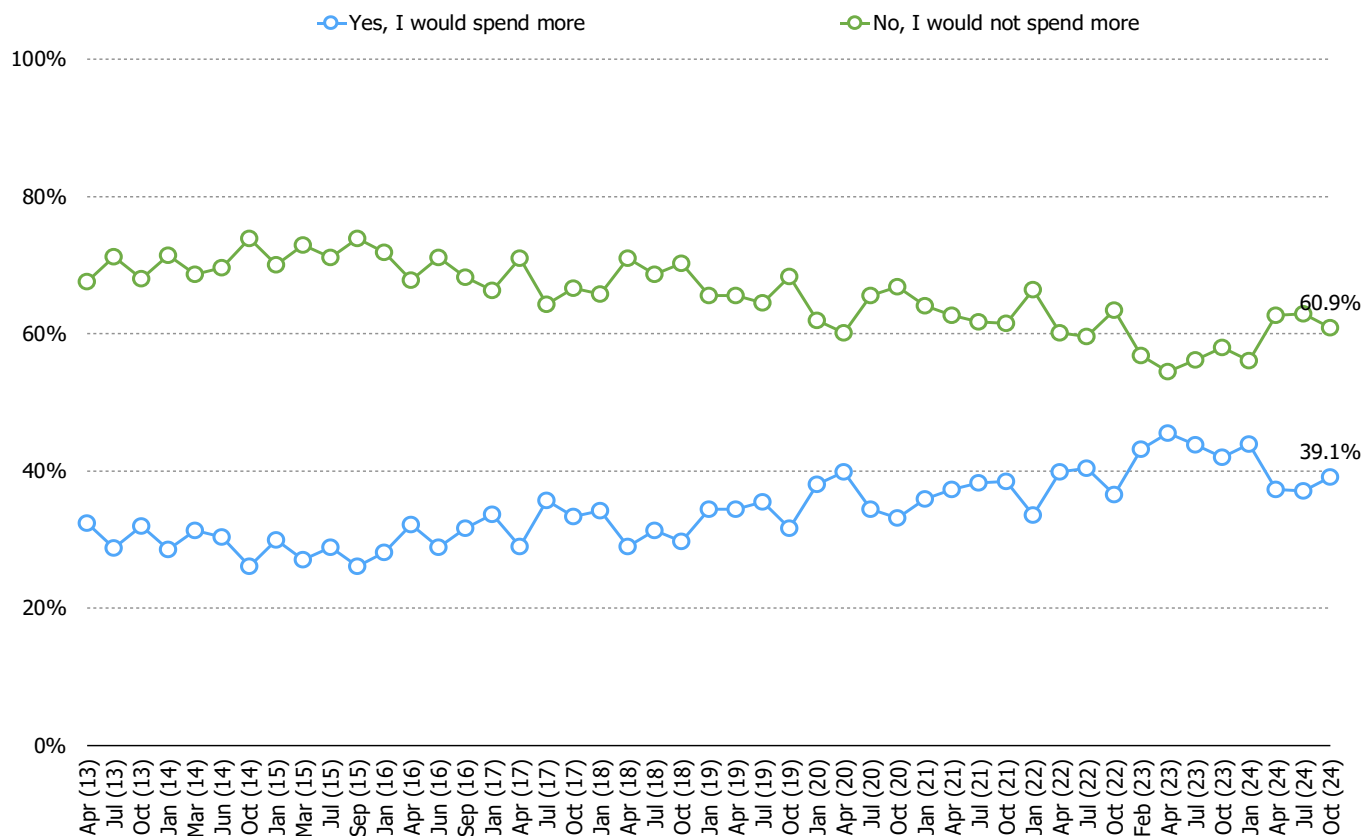
HAS YOUR OPINION OF APPLE CHANGED OVER THE PAST YEAR?

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

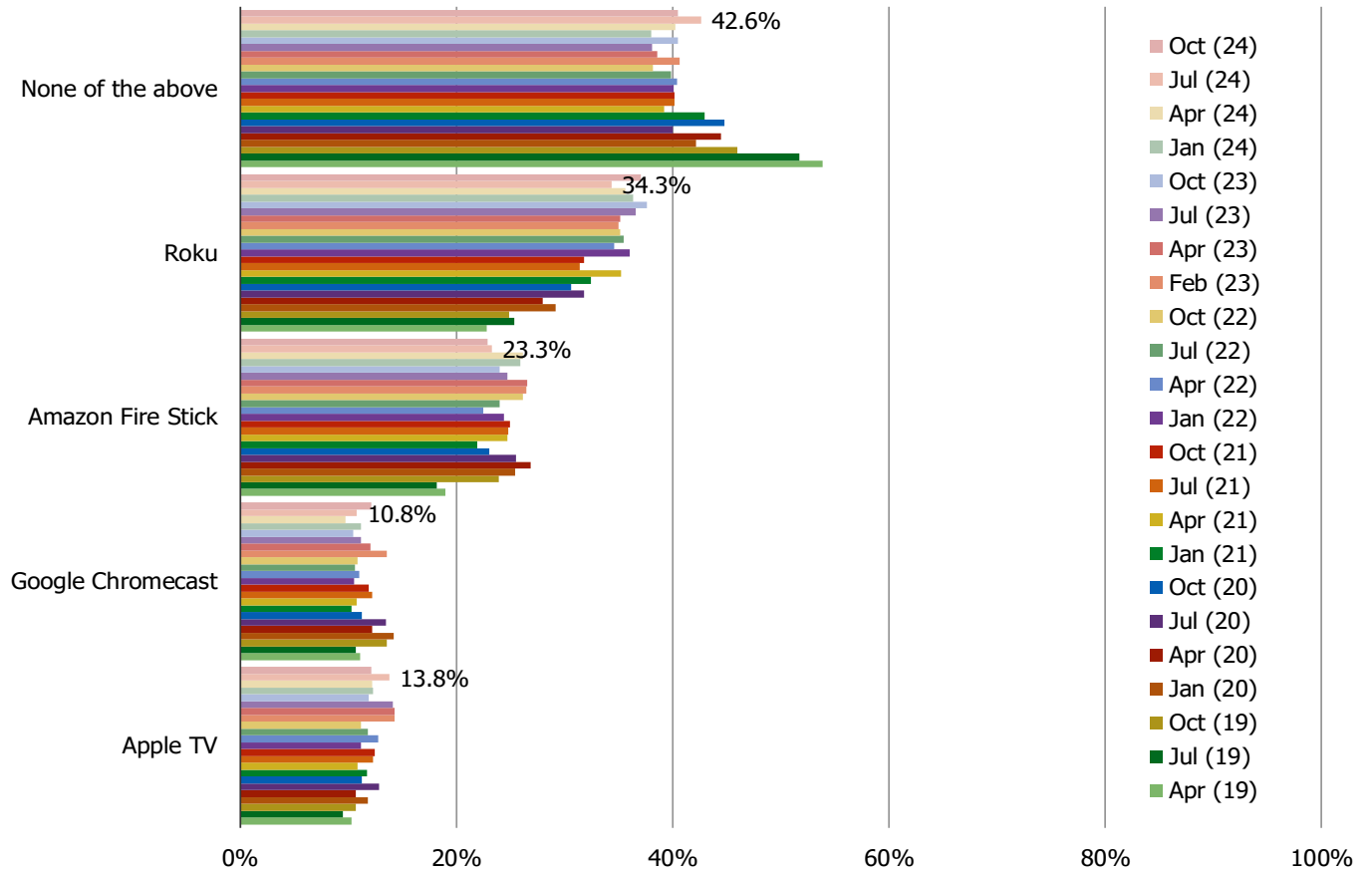


# STREAMING PLAYERS

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DO YOU OWN ANY OF THE FOLLOWING STREAMING PLAYERS?

This question was posed to all consumers.

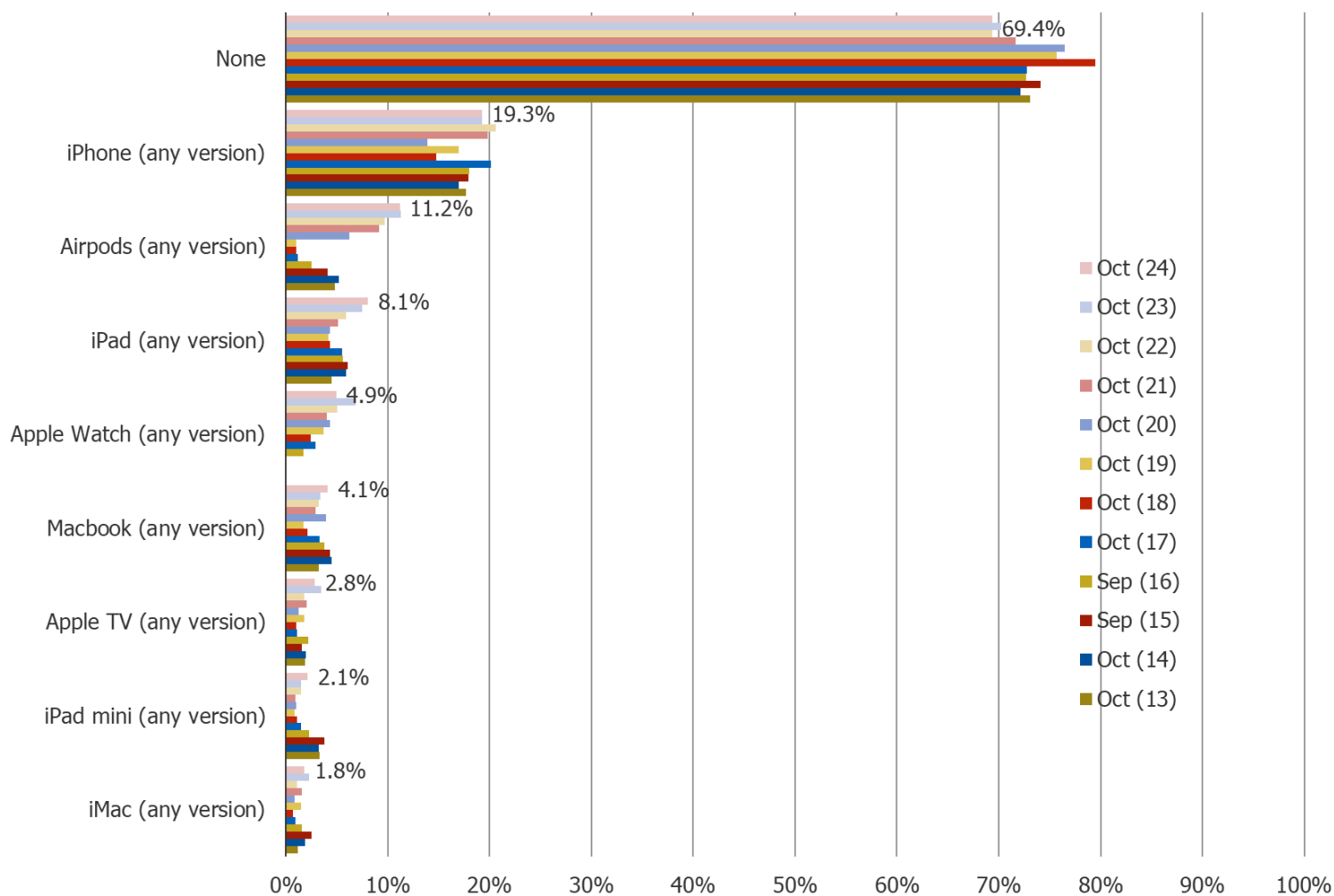


# CONSUMER ELECTRONICS ENGAGEMENT Y/Y COMPARISONS

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HAVE YOU PURCHASED ANY OF THE FOLLOWING APPLE PRODUCTS IN THE PAST SIX MONTHS?

This question was posed to all respondents.





DO YOU PLAN TO PURCHASE ANY OF THE FOLLOWING APPLE PRODUCTS OVER THE NEXT FEW MONTHS (SELECT ALL THAT APPLY)?

This question was posed to all respondents.

