

Bespoke Survey Research

April 2025

Consumer Electronics

Volume 49 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: AAPL, AMZN, GOOG, Samsung.

Key Takeaways:

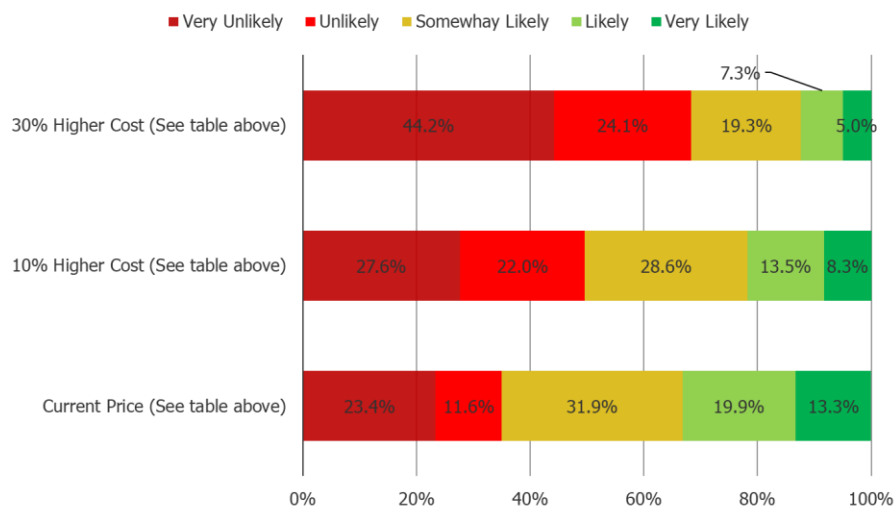
- ❑ Consumers are not yet showing signs of significantly delaying or pulling forward their phone purchases (relative to feedback in recent quarters). Over the long history of our survey refresh cycles have stretched (ie, gotten longer), but the data has been more stable in recent years.
- ❑ Among iPhone owners, willingness to upgrade declines if tariffs lead to price increases:
- ❑ At a 10% price increase, the sharpest decline in purchase likelihood occurs among those who've owned their iPhone for over 3 years — a group one would assume might be poised for upgrades. The drops aren't just among lower income respondents. In fact, the relative declines in purchase likelihood are a bit more pronounced among \$100k+ respondents.
- ❑ The share of iPhone owners considering an upgrade rose slightly quarter-over-quarter, though it doesn't eclipse levels seen in October 2024.
- ❑ Camera improvements continue to be a top driver of new phone purchases, consistent with prior surveys.
- ❑ While AI features have gained visibility, they still lag behind hardware enhancements like the camera in influencing upgrade decisions.
- ❑ The share of iOS users interested in Apple Intelligence has stagnated (and declined slightly) quarter-over-quarter.
- ❑ AI chatbot usage is on the rise, and user sentiment has improved sequentially, particularly among those using them for work-related tasks.

RECENTLY ADDED QUESTIONS

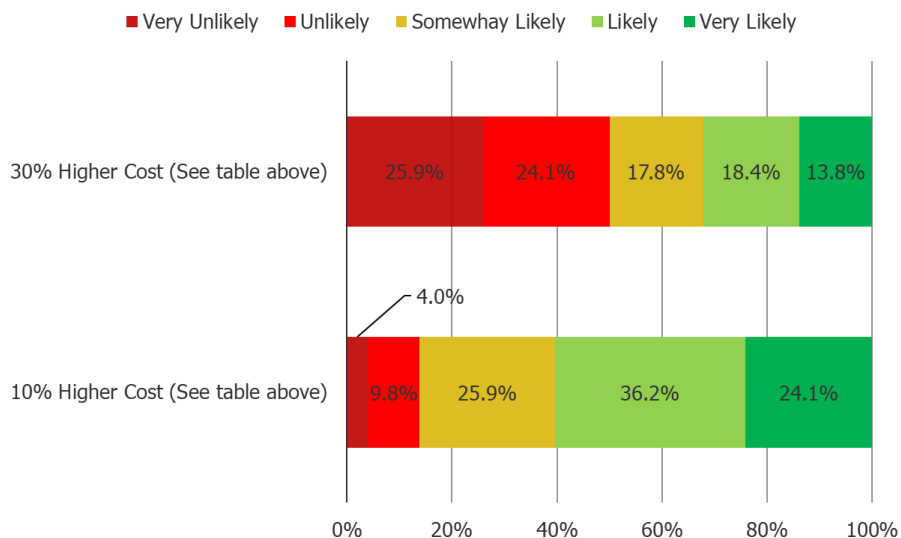
IMAGINE YOU DECIDED TO GET A NEW IPHONE TODAY, HOW LIKELY WOULD YOU BE TO ACTUALLY BUY THE MODEL THAT YOU WOULD TYPICALLY CHOOSE IF PRICES WERE...

This question was posed to iPhone owners (N = 500+)

Model	Current Price		10% Higher Cost		30% Higher Cost	
	Full Price	Monthly (24 mo)	Full Price (+10%)	Monthly (+10%)	Full Price (+30%)	Monthly (+30%)
iPhone 16e	\$ 599.00	\$ 24.95	\$ 658.90	\$ 27.44	\$ 778.70	\$ 32.44
iPhone 16	\$ 799.00	\$ 33.29	\$ 878.90	\$ 36.62	\$ 1,038.70	\$ 43.28
iPhone 16 Pro	\$ 999.00	\$ 41.62	\$ 1,098.90	\$ 45.78	\$ 1,298.70	\$ 54.11
iPhone 16 Pro Max	\$ 1,199.00	\$ 49.95	\$ 1,318.90	\$ 54.95	\$ 1,558.70	\$ 64.94



Focusing on respondents who said they would be likely or very likely to buy at current price today...

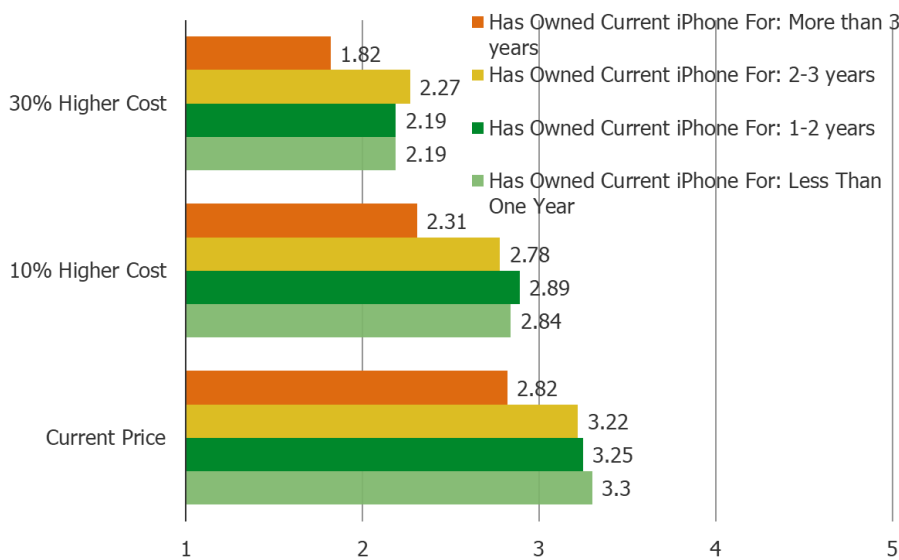
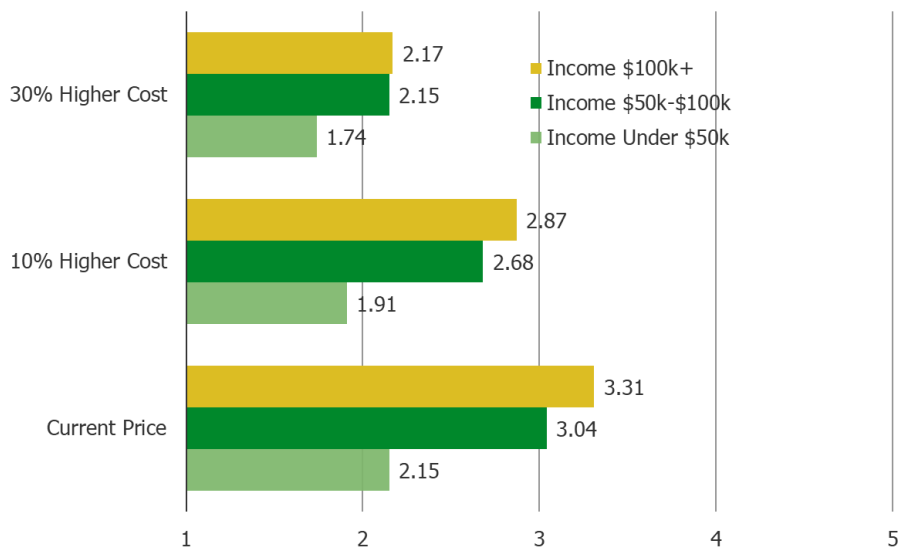


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Cross-tabbing the data by income level and by how long they own their current iPhone for. (1 = very unlikely, 2 = unlikely, 3 = somewhat likely, 4 = likely, 5 = very likely).



CALCULATING % REDUCTIONS IN DEMAND BY SEGMENT...

This question was posed to iPhone owners (N = 500+)

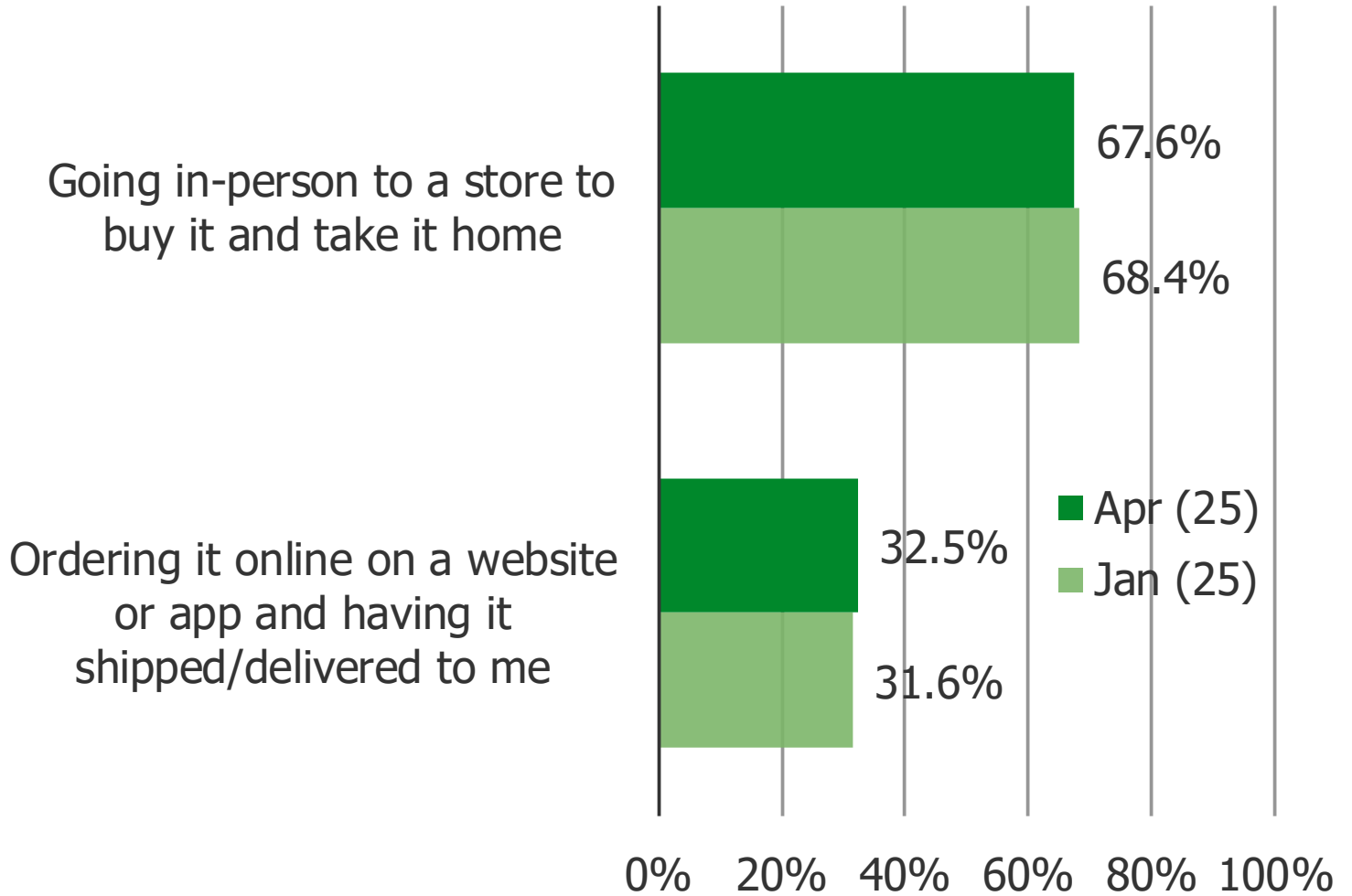
 % Reduction in Demand (based on average likelihood to purchase)

Segment	% Drop @ +10%	% Drop @ +30%
Income Under \$50k	11.2%	19.1%
Income \$50k-\$100k	11.8%	29.3%
Income \$100k+	13.3%	34.4%
Owned <1 Year	13.9%	33.6%
Owned 1-2 Years	11.1%	32.6%
Owned 2-3 Years	13.7%	29.5%
Owned >3 Years	18.1%	35.5%

- Higher-income consumers show the largest relative drop in demand at a 30% price increase, suggesting price sensitivity even among wealthier buyers when value perception erodes.
- Consumers who've owned their iPhones for over 3 years are especially sensitive to even a 10% price increase, despite being the most likely upgrade candidates.

WHICH OF THE FOLLOWING DO YOU THINK IS THE BEST WAY TO BUY A NEW SMARTPHONE?

This question was posed to all respondents.



RESPONDENTS WHO PREFER ONLINE – WHY?

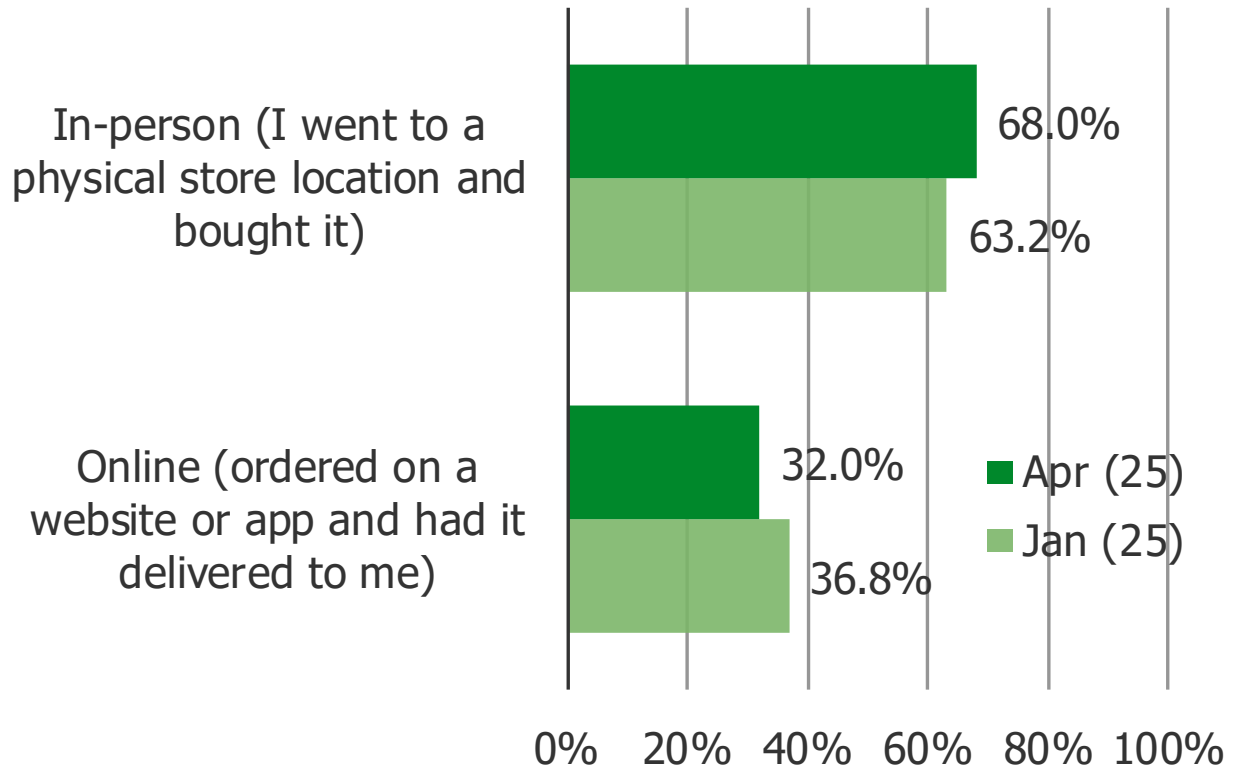
- I can choose what I want online without trying to be upsold things I don't need by some sales person
- Save myself time just get same day shipping
- Bigger variety of products
- Because in store options are limited
- Convenience
- Because the people in the store are not helpful. I have already made my decision before getting there.
- Easier and less hassle
- Just easier with less upselling
- Because it will be a better quality when I'm already getting at Walmart
- If you done research before
- Fast and convenient
- Ease of browsing and choosing. Less impulse buying.
- I prefer the ease of looking at multiple sites and comparing prices instead of driving and wasting time and gas
- It's easier to see all the features and compare it with other products at home.
- Prices online are generally better
- Meets my needs best
- More convenient
- Easier
- Ease of access
- I would definitely buy my new smart phone online and have it ordered to me because I don't like to go into the stores myself anymore
- My son buys it online for me
- Online pricing in general is far better.
- I get more options online.
- I do my research and usually buy the same brand so I just order online for convenience. I'm not shopping for something new and know what I want.
- it saves me time and gas
- I want an unlocked phone
- Can't afford one at a store
- I prefer look at it on line
- More convenient
- You can take your time and make sure everything transfers
- Because I want to get one that works with my service
- Convenience
- Quicker and easier.
- Convenience
- Prefer not to interact with salespeople who pressure you
- It's easiest way to get the best deal.
- I have done this many times in the past. I am very comfortable setting up a new phone.

RESPONDENTS WHO PREFER IN-STORE – WHY?

- I like to be able to see the phone I want in person.
- Because I don't trust online retailers
- I want to touch it before I buy it
- Getting the phone the same day
- I want to see it, play with it, get on the spot answers to my questions!
- I like holding the product in my hands and having someone with knowledge of the item there to answer questions
- Better selection in store
- I get to test it
- You get it faster
- I like knowing exactly what I'm buying
- Can set it up correctly
- I like it right away and I can see it and hold it
- Not a online shopper, except if its ebay
- Like the service and setup.
- Hands on ("test drive") prior to buying
- Can look at the product first hand
- So I can physically play with the phone
- You can get any set up help that you might need
- i want to see it
- Learn more
- I want to see it and have it operating
- To know what you are getting
- I want it set up for me for immediate use
- Because I'm so sure you can actually touch the phone and ask questions
- To see how it works and the design feature
- I like to see and experience the product upfront.
- Like seeing and fully understanding its features
- You get the personal feel for it
- I know for sure I'll leave with no problems of it not working
- I like being able to handle it first
- I like to see it and hold it and the store explain new features.
- Porch pirates.
- Just easier than having it mailed.
- It won't get stolen in the mail
- So that I can see it on person to know exactly what I am getting.
- I need hands on.
- I like being in person.
- I prefer to go in store look, buy and take home immediately.
- I can look at the phone and they can better assist me in my needs.
- I would never buy a smart phone without first being able to hold it and try it out.
- Easier
- Convenience, and I like to look and touch before I buy

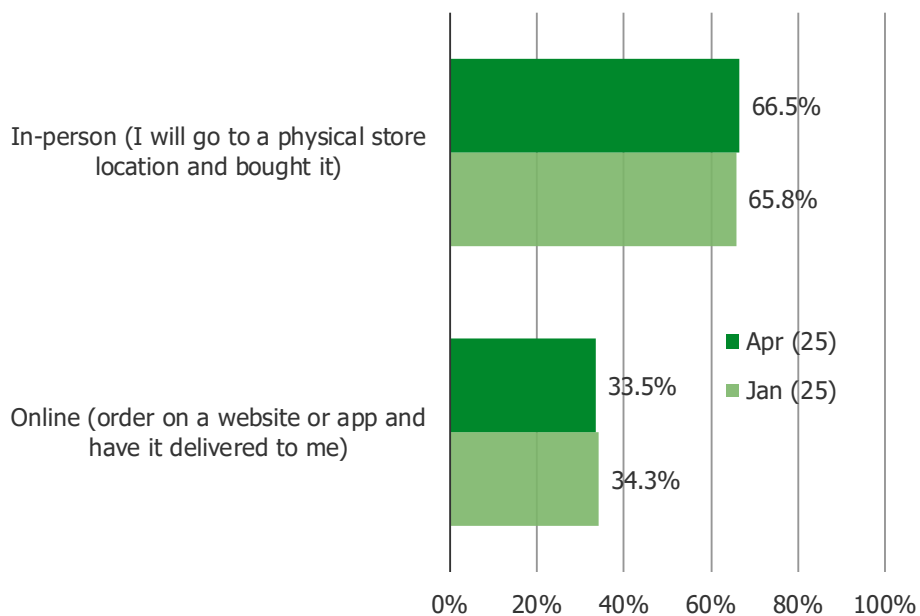
THINKING ABOUT THE SMARTPHONE YOU CURRENTLY OWN, HOW DID YOU GET IT?

This question was posed to all respondents.

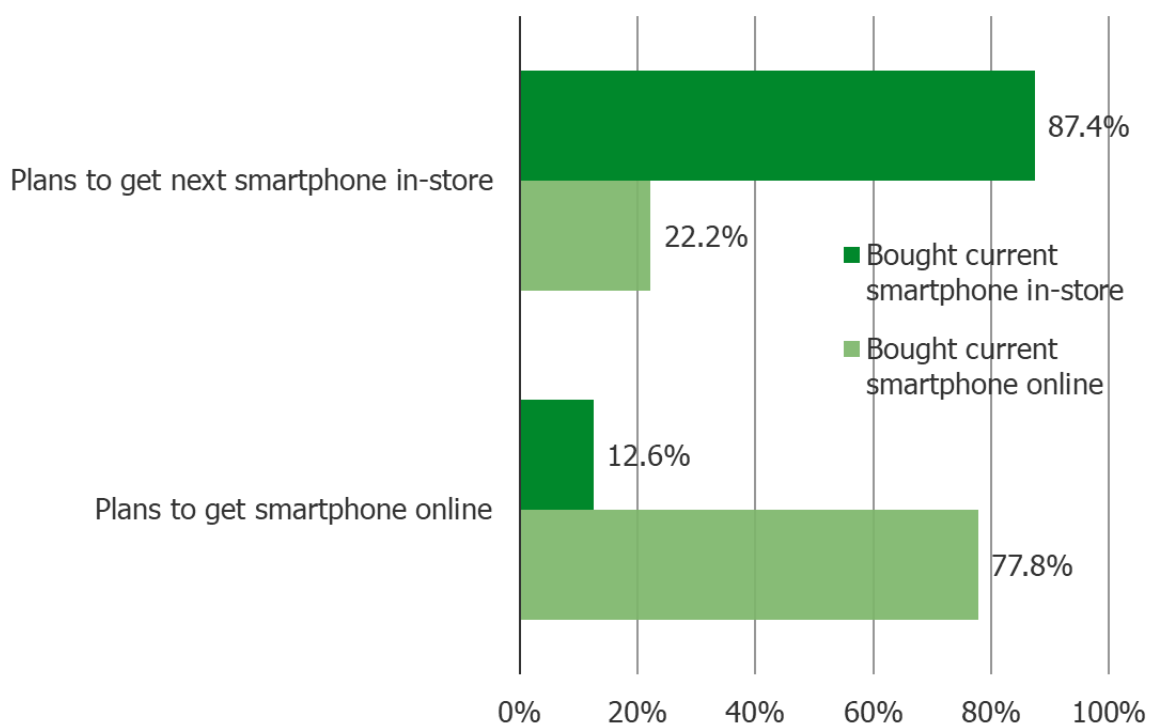


THINKING ABOUT YOUR NEXT SMARTPHONE, HOW WILL YOU GET IT?

This question was posed to all respondents.



Cross-tabbed by how respondents got their CURRENT smartphone...



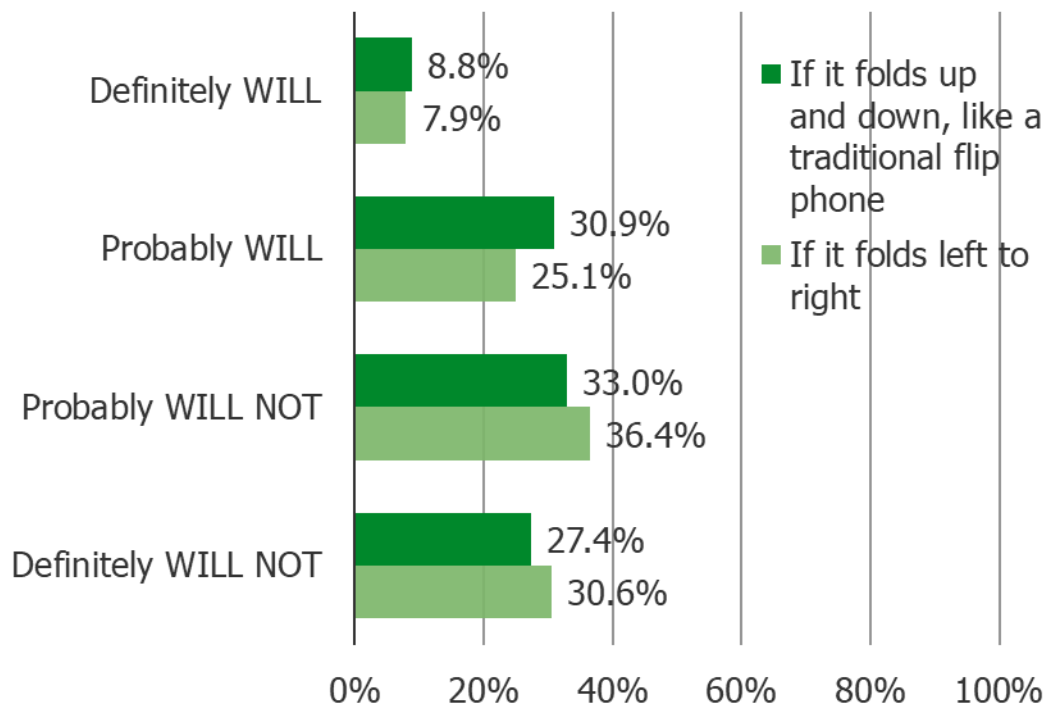
HOW MUCH INTEREST WOULD YOU HAVE IN A FOLDABLE IPHONE? (ONE THAT FOLDS LIKE A TRADITIONAL FLIP PHONE TO A SMALLER FORM FACTOR, BUT THEN FLIPS OPEN TO THE SIZE OF A NORMAL IPHONE OR LARGER).

This question was posed to current iOS users.



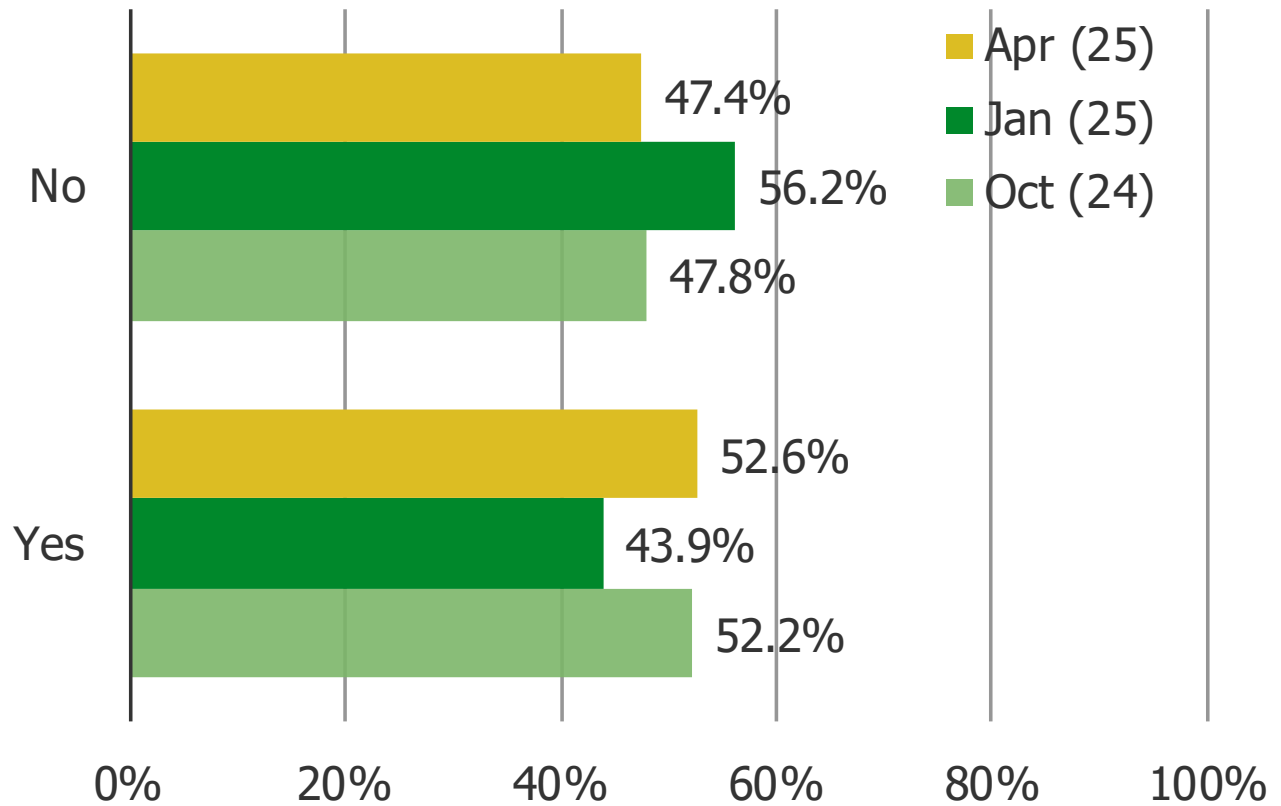
IF APPLE RELEASES A FOLDABLE IPHONE IN 2025 OR 2026, HOW LIKELY WOULD YOU BE TO GET IT?

This question was posed to current iOS users.



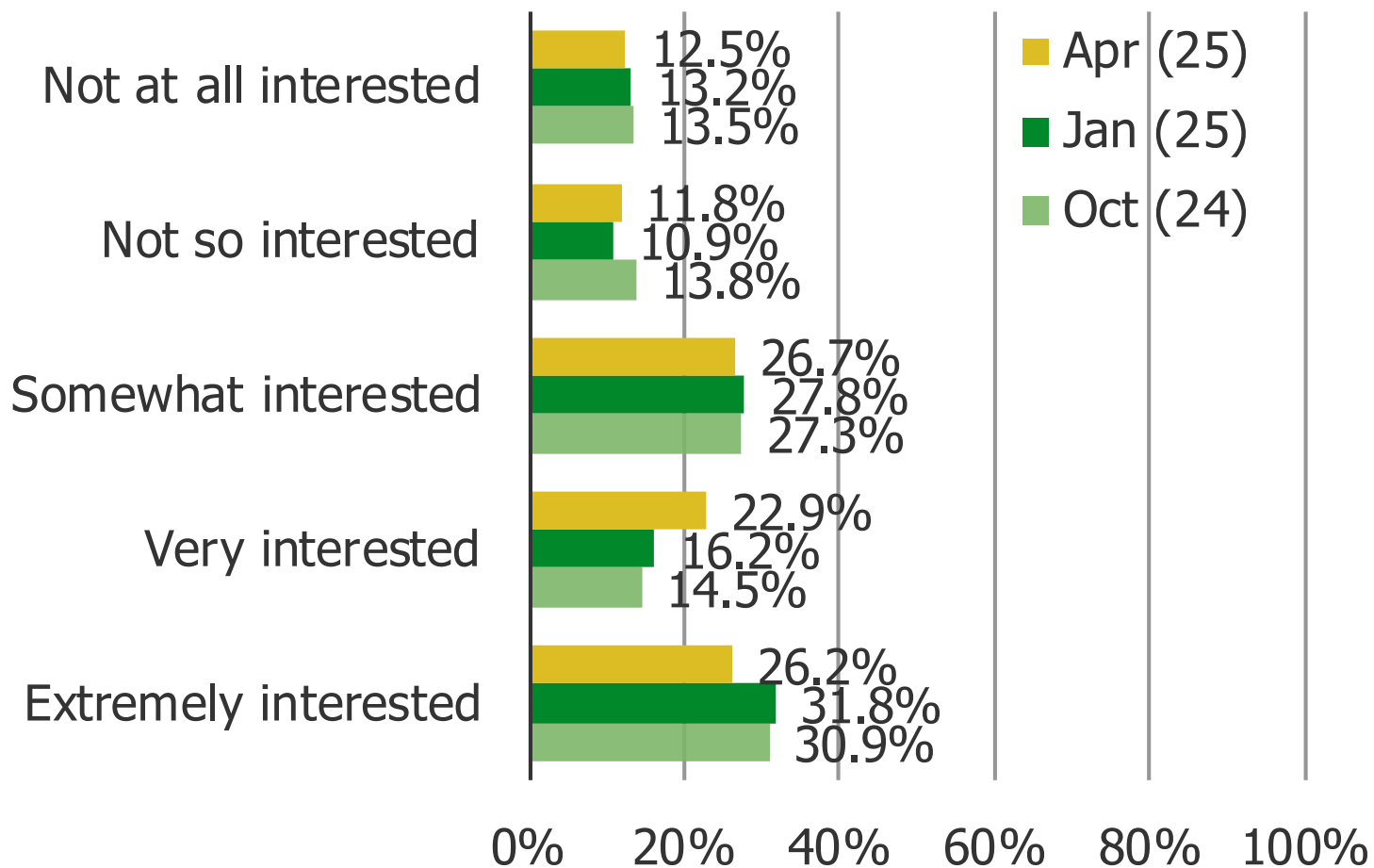
ARE YOU CURRENTLY CONSIDERING UPGRADING YOUR IPHONE TO A NEW/DIFFERENT MODEL THAN WHAT YOU HAVE NOW?

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



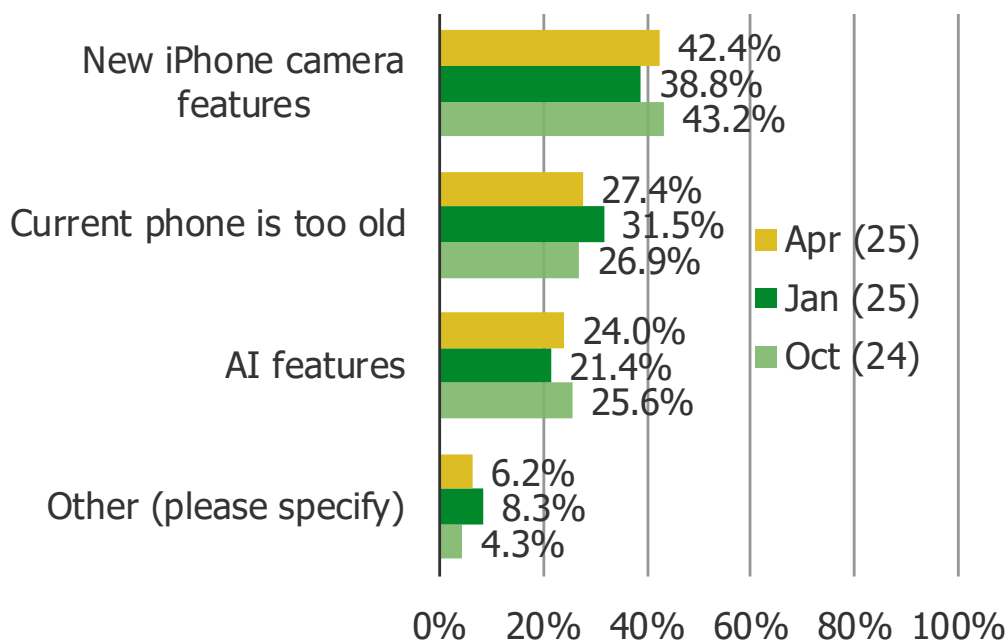
DO YOU HAVE ANY INTEREST IN THE LATEST IPHONES THAT WERE RELEASED? (IPHONE 16, IPHONE 16 PLUS, IPHONE 16 PRO, IPHONE 16 PRO MAX)

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

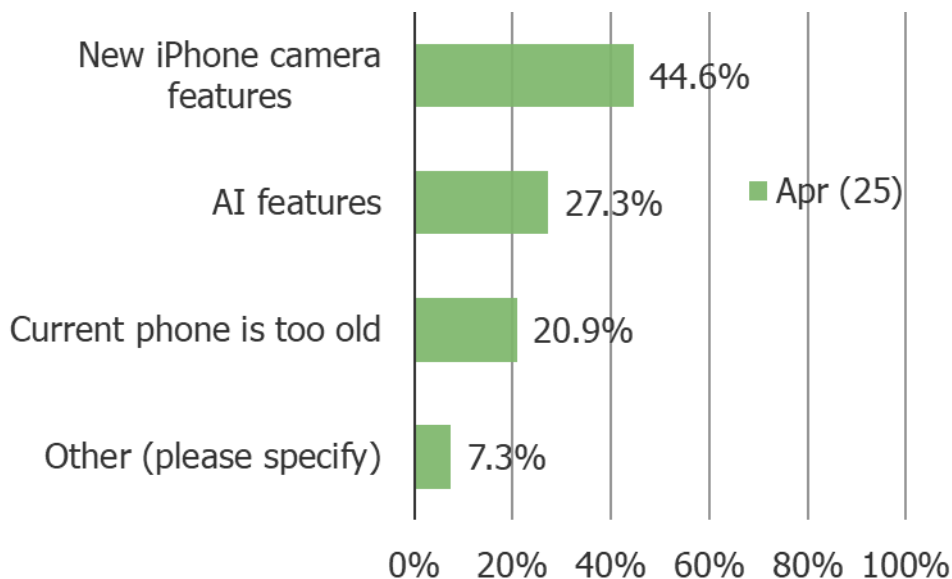


YOU MENTIONED THAT YOU ARE AT LEAST SOMEWHAT INTERESTED IN ONE OF THE NEWEST IPHONES JUST RELEASED. WHAT MAKES YOU MOST INTERESTED IN THE NEW PHONE(S)?

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

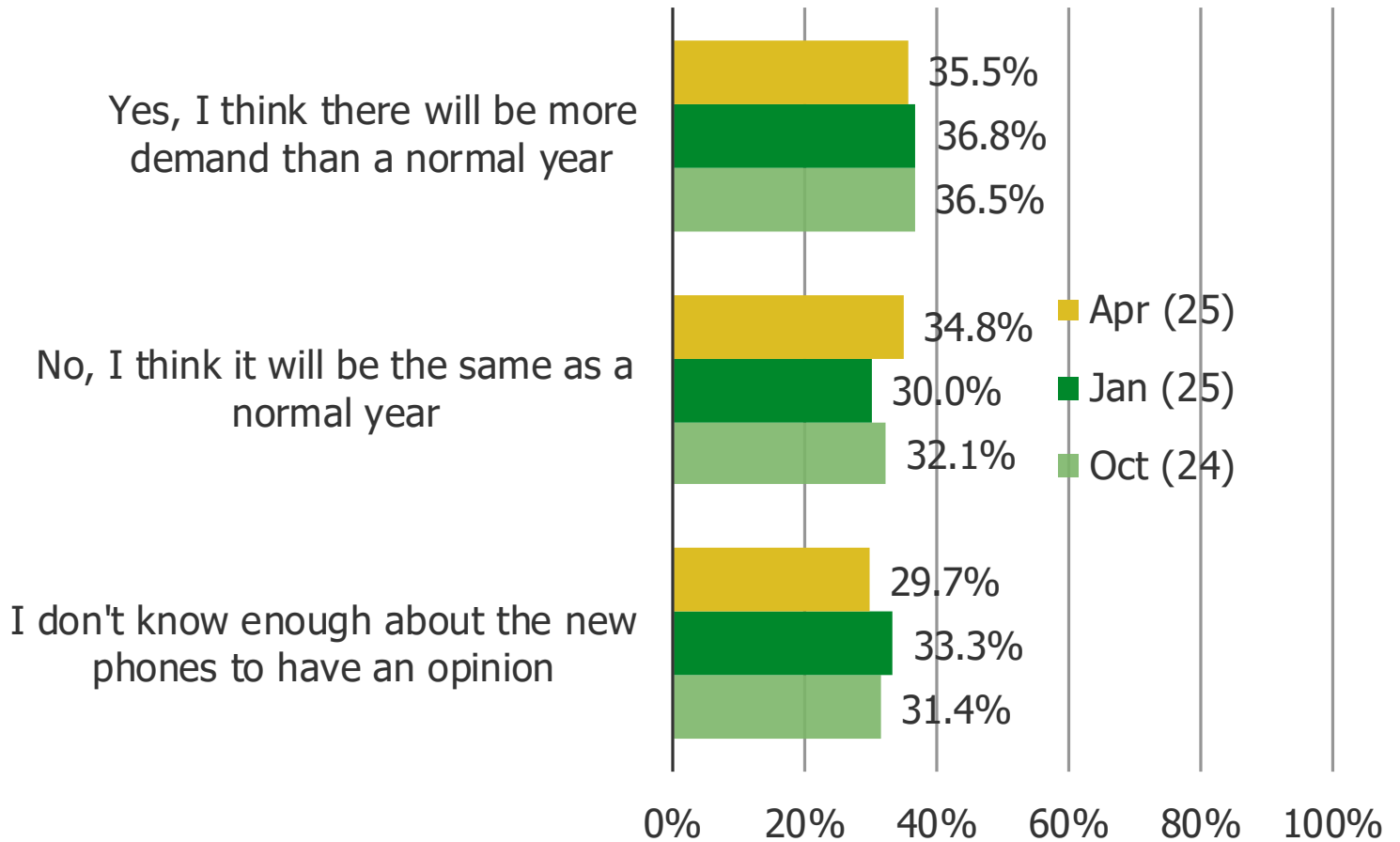


Focusing on iOS users who said they are extremely interested in one of the newest iPhones.



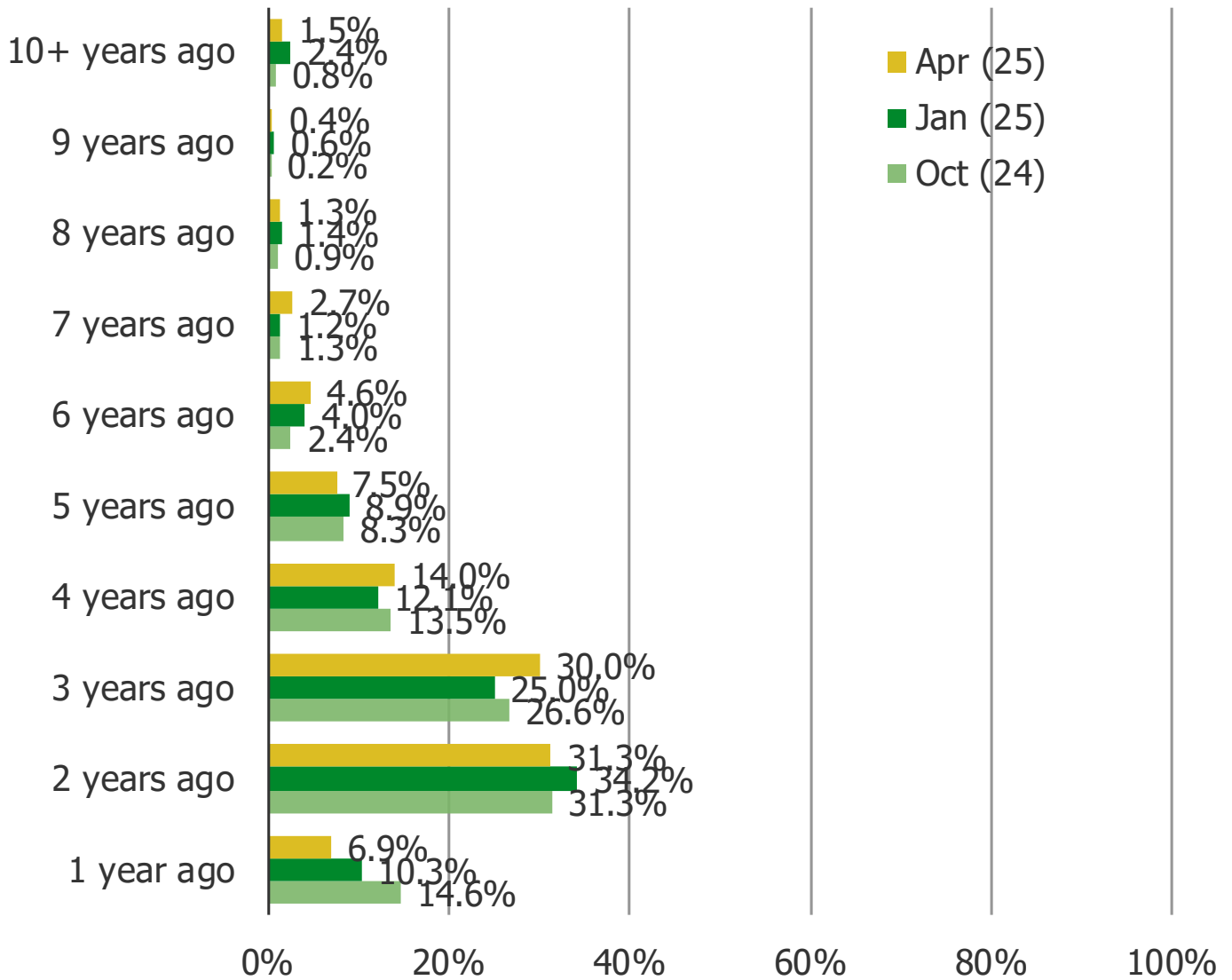
IN YOUR VIEW, DO YOU THINK THE NEWEST IPHONES (IPHONE 16, IPHONE 16 PLUS, IPHONE 16 PRO, IPHONE 16 PRO MAX) HAVE CHARACTERISTICS OR FEATURES ABOUT THEM THAT WILL CAUSE MORE IPHONE OWNERS TO UPGRADE COMPARED TO A TYPICAL YEAR WHEN NEW IPHONES ARE RELEASED?

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



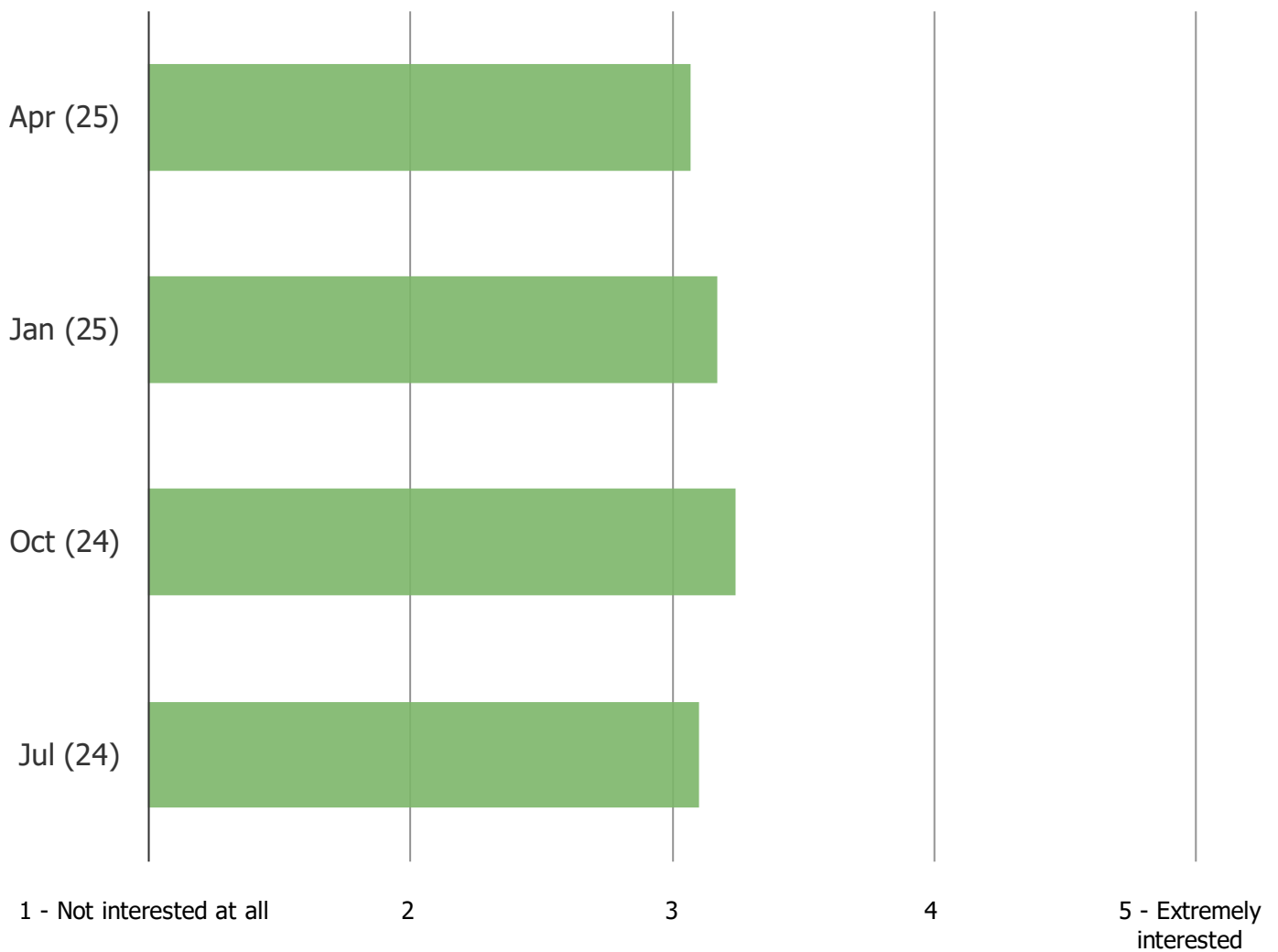
YOU MENTIONED THAT YOU GOT YOUR SMARTPHONE MORE THAN A YEAR AGO. HOW MANY YEARS AGO DID YOU GET YOUR CURRENT SMARTPHONE?

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



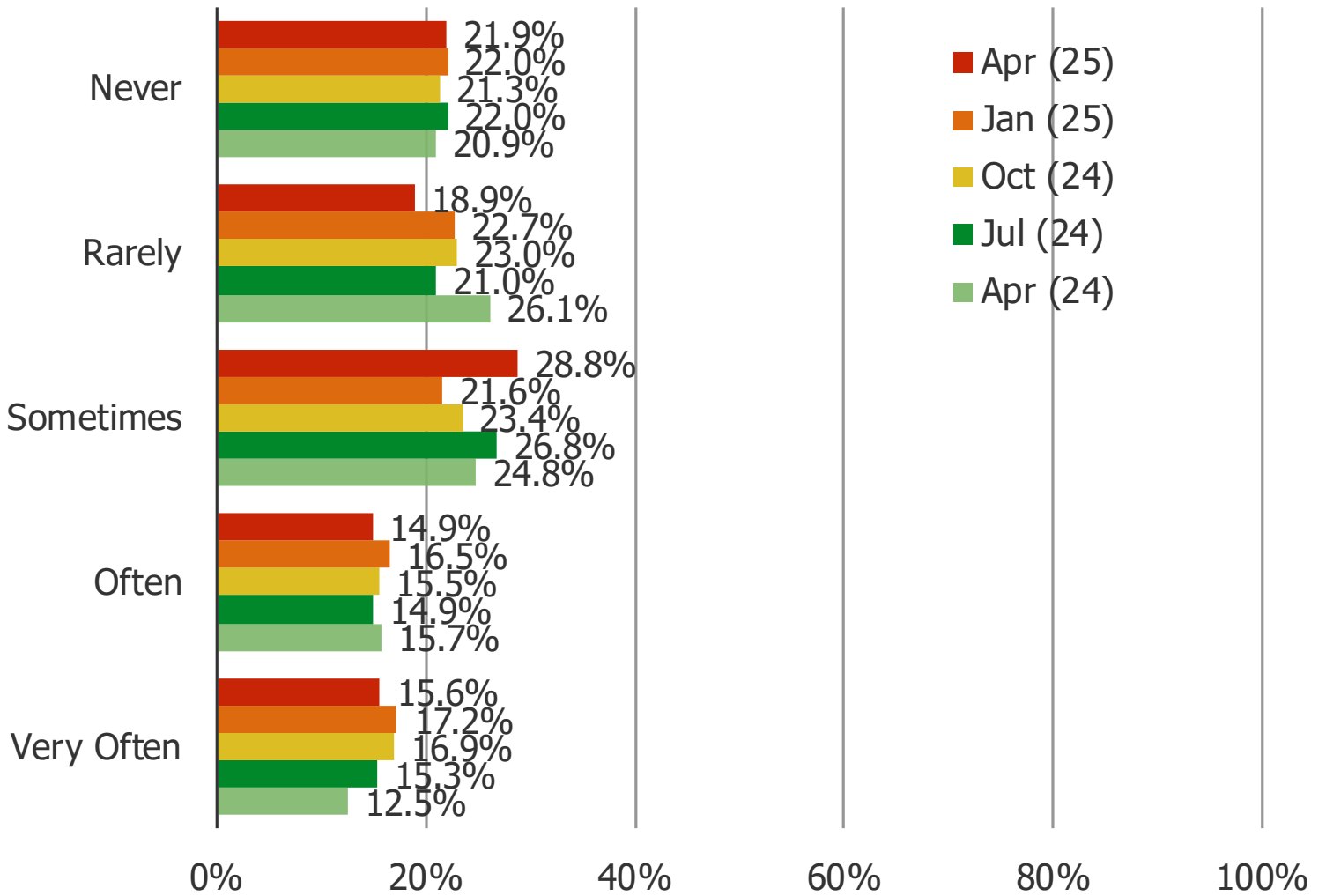
APPLE INTELLIGENCE WILL ENCOMPASS A SUITE OF AI AND MACHINE LEARNING FEATURES INTEGRATED ACROSS APPLE'S ECOSYSTEM, ENHANCING PERSONALIZED RECOMMENDATIONS, HEALTH AND FITNESS TRACKING, SIRI CAPABILITIES, IMAGE CREATION, WRITING TOOLS, AND PRIVACY MEASURES TO PROVIDE A MORE INTUITIVE, SECURE, AND CUSTOMIZED 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.



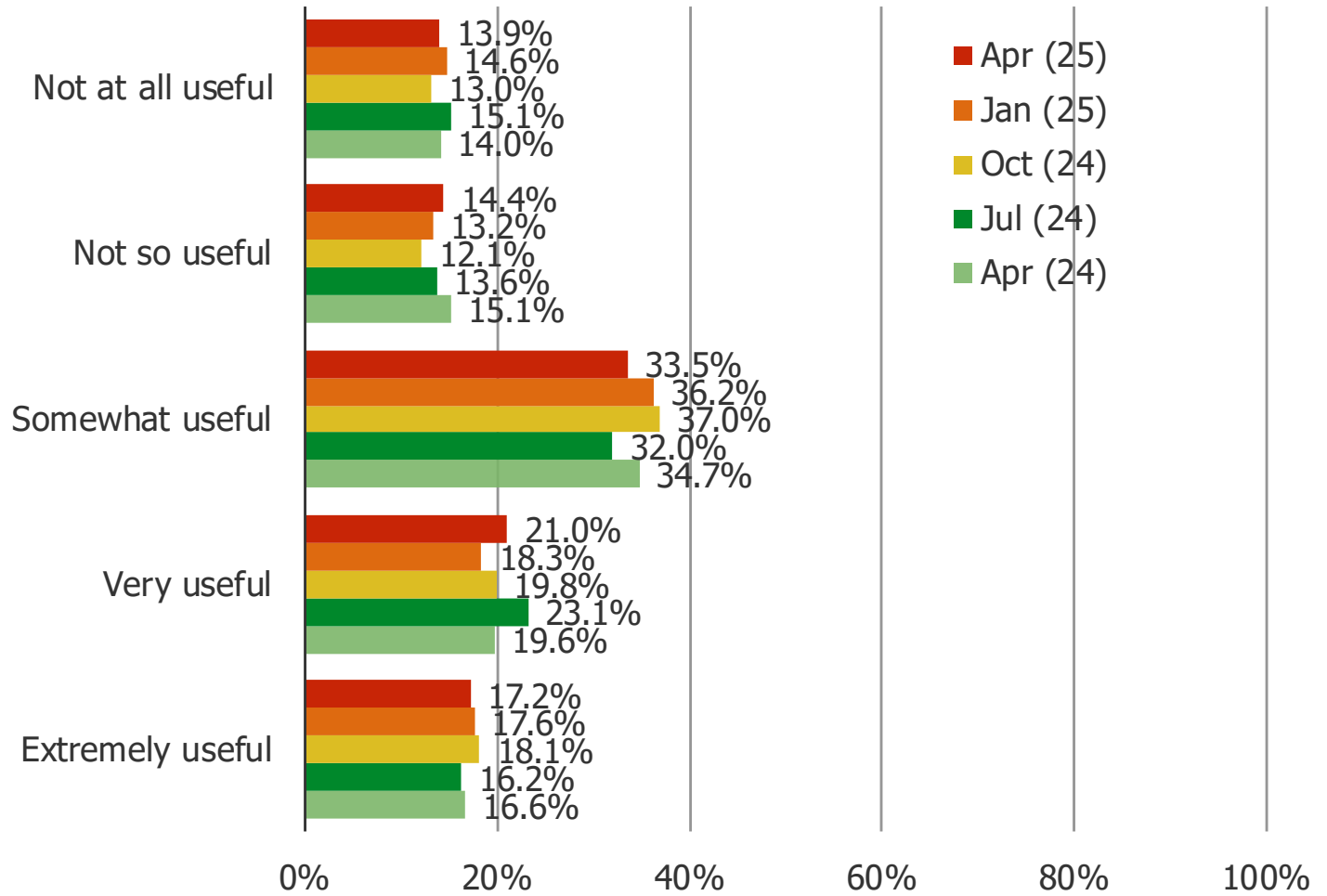
HOW OFTEN DO YOU USE SIRI ON YOUR IPHONE NOW?

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



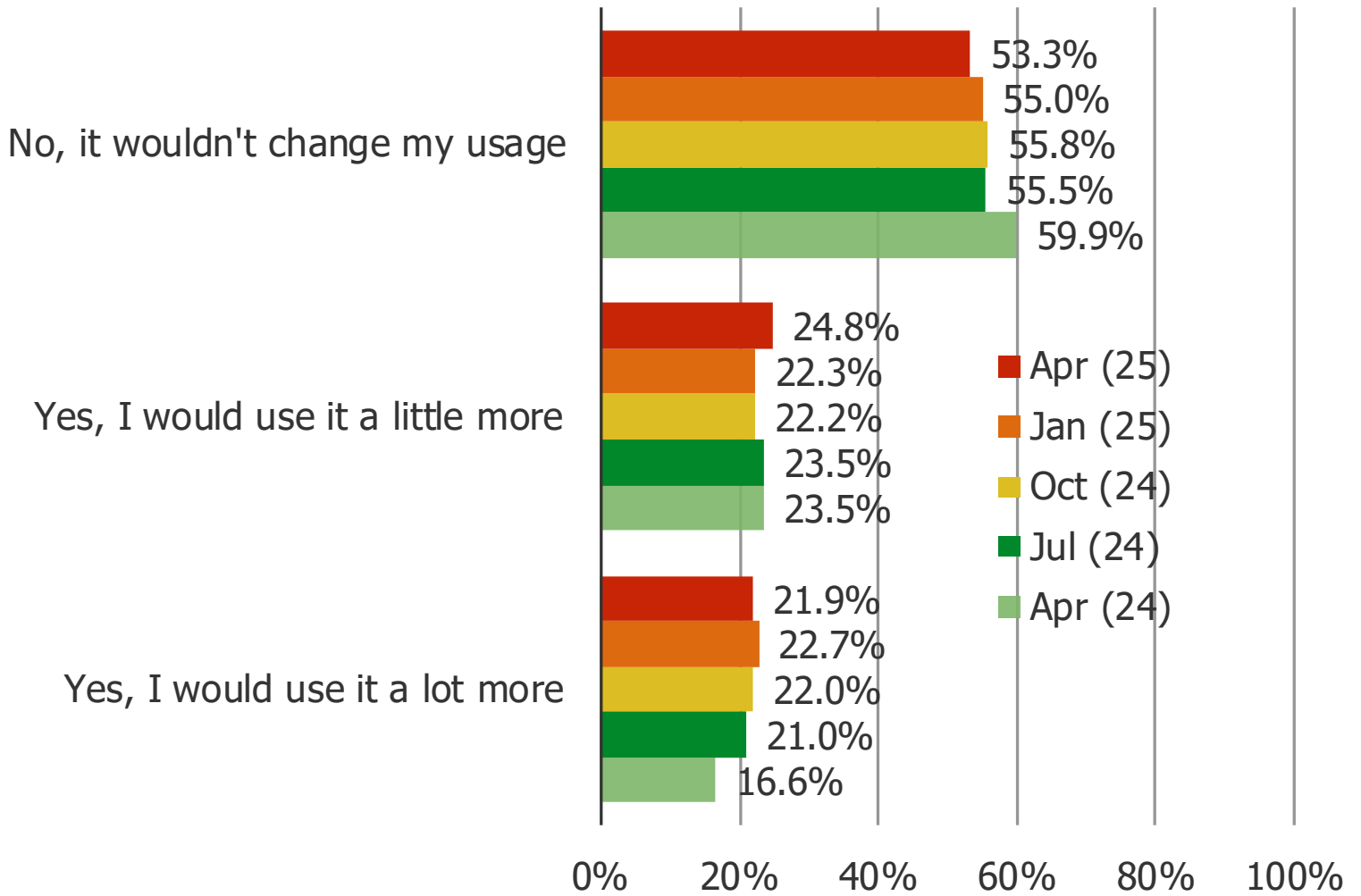
HOW USEFUL DO YOU FIND SIRI TO BE?

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



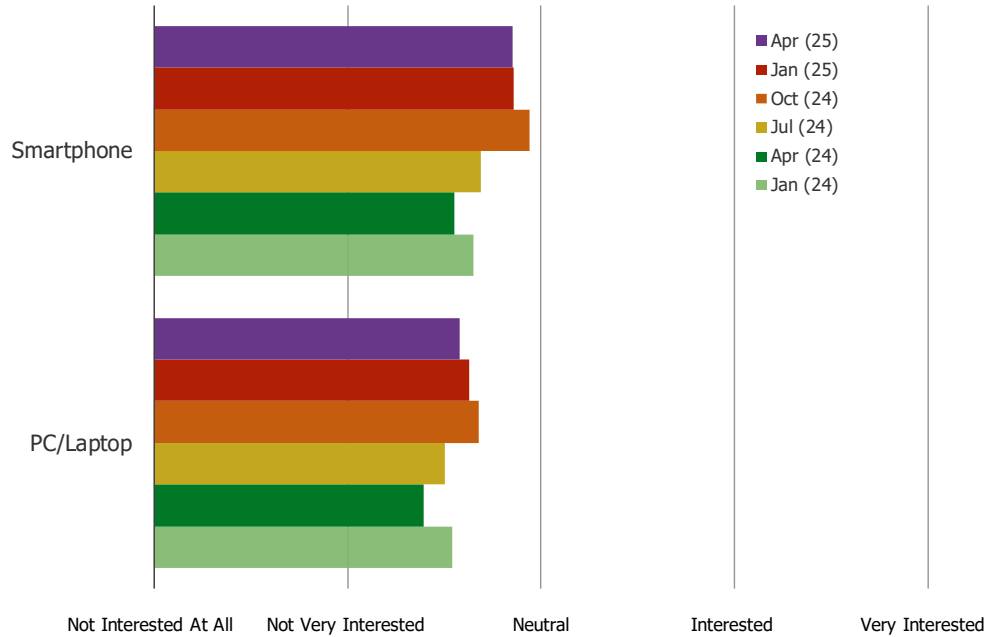
WOULD YOU CHANGE YOUR USAGE OF SIRI IF SIRI WAS ENHANCED BY AI (ARTIFICIAL INTELLIGENCE)

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

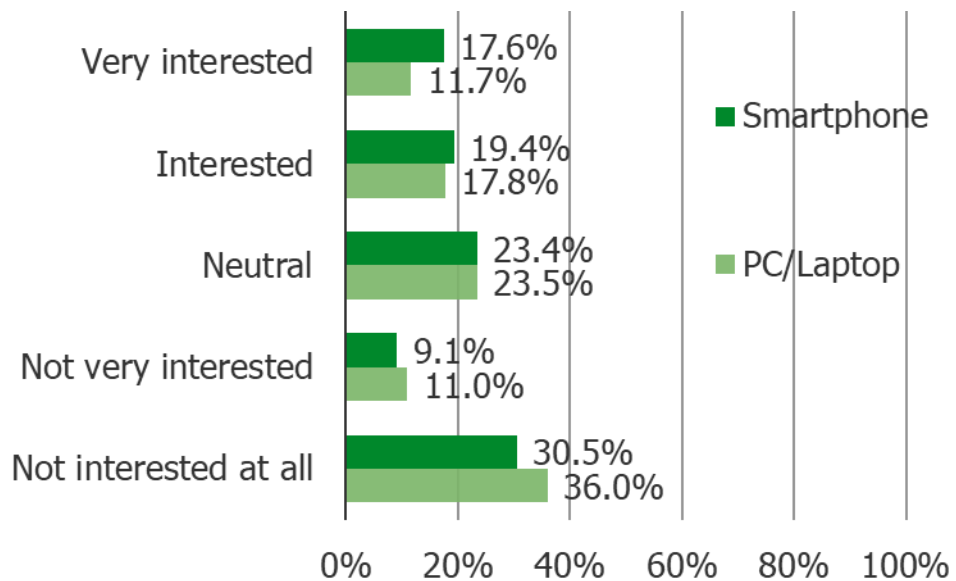


HOW INTERESTED ARE YOU IN USING AI (ARTIFICIAL INTELLIGENCE) CHATBOTS AND APPS, LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, ETC) WHILE USING THE FOLLOWING DEVICES...

This question was posed to all respondents.

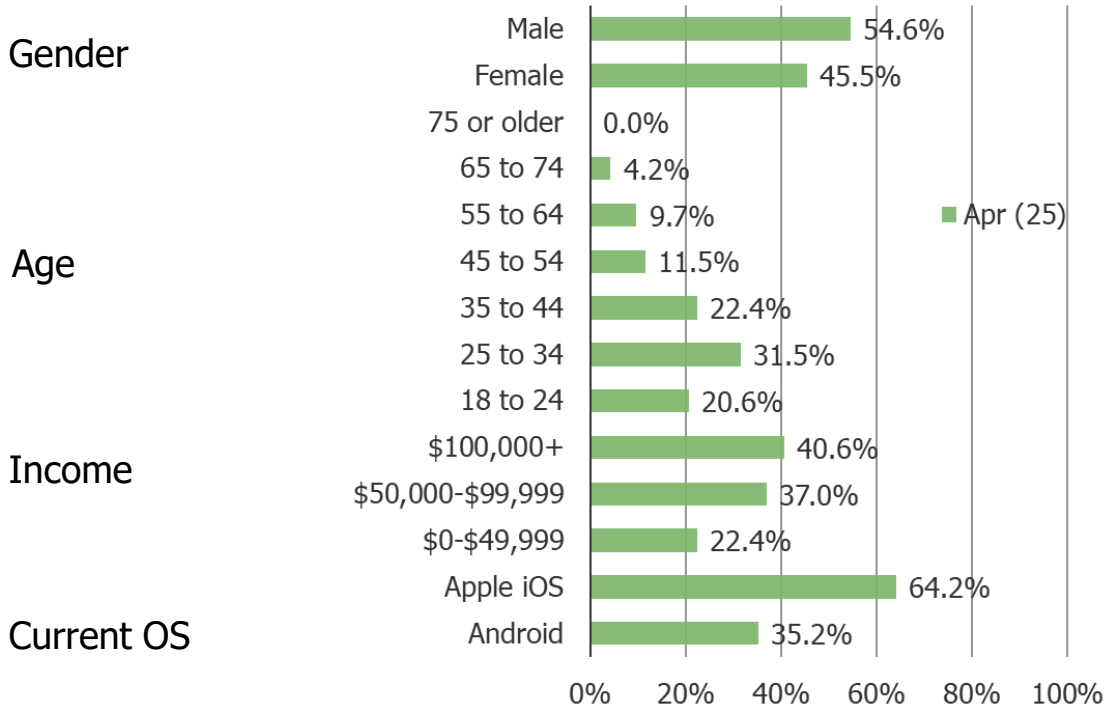
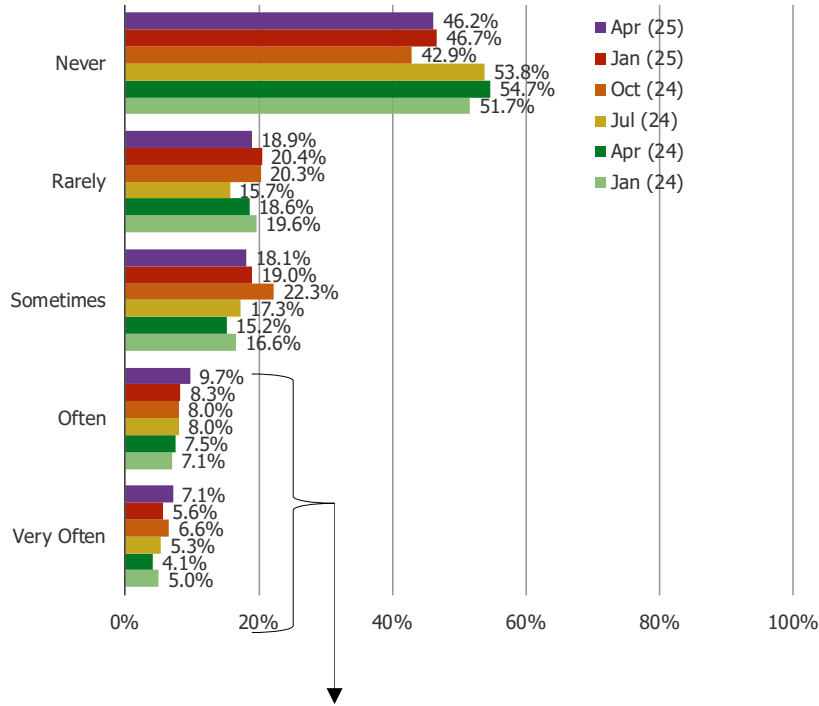


April 2025 Data Breakout



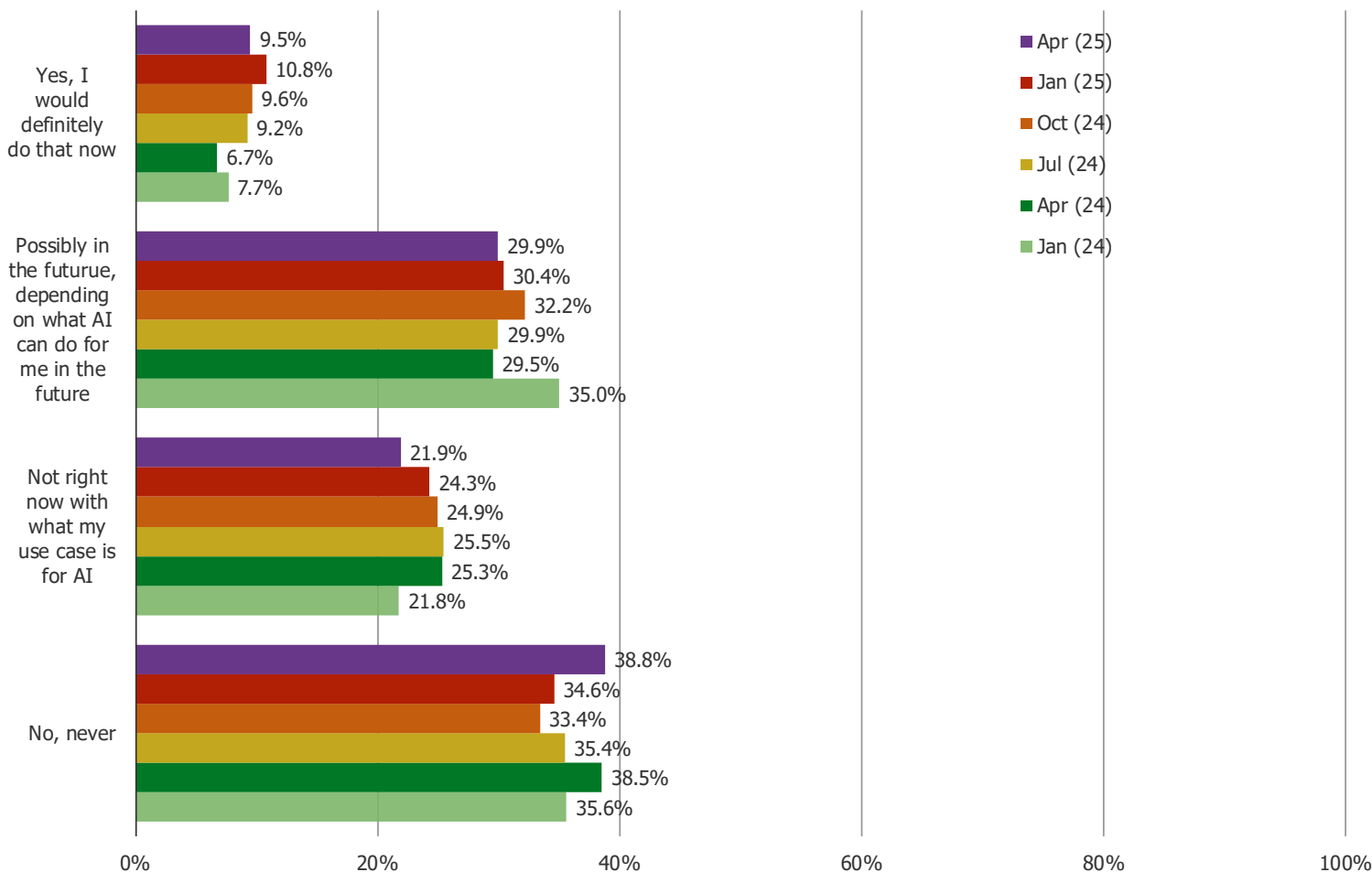
HOW OFTEN DO YOU USE AI CHATBOTS LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, OR OTHERS IN YOUR LIFE?

This question was posed to all respondents.



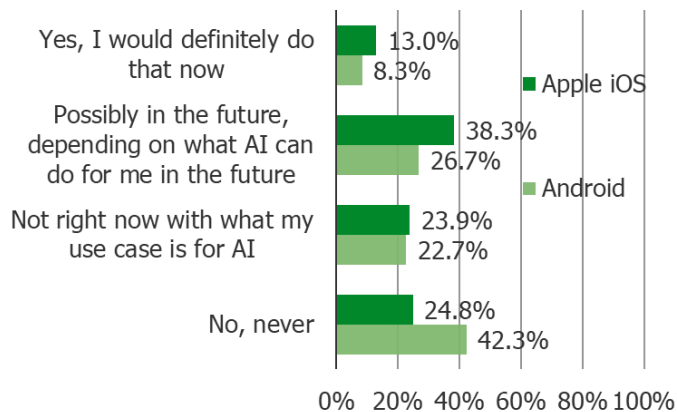
COULD YOU EVER SEE YOURSELF GOING OUT AND BUYING A NEW SMARTPHONE OR LAPTOP IF THOSE DEVICES WERE ABLE TO WORK BETTER WITH AI RELATED APPS THAN THE EXISTING ONES YOU OWN?

This question was posed to all respondents.

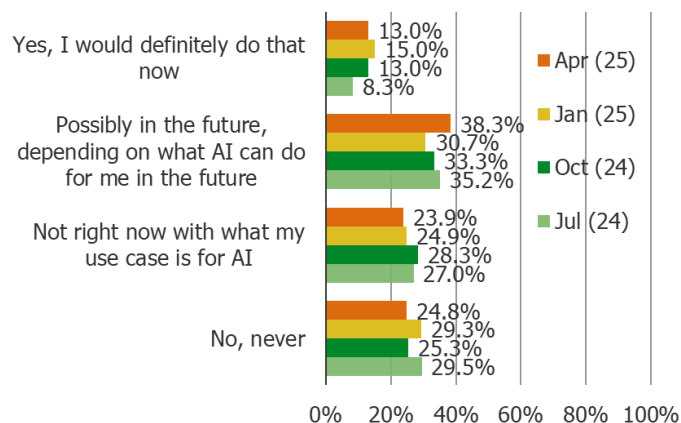


Cross-Tabbing The Above Data:

Apple vs. Android Users (APRIL 25 Data)

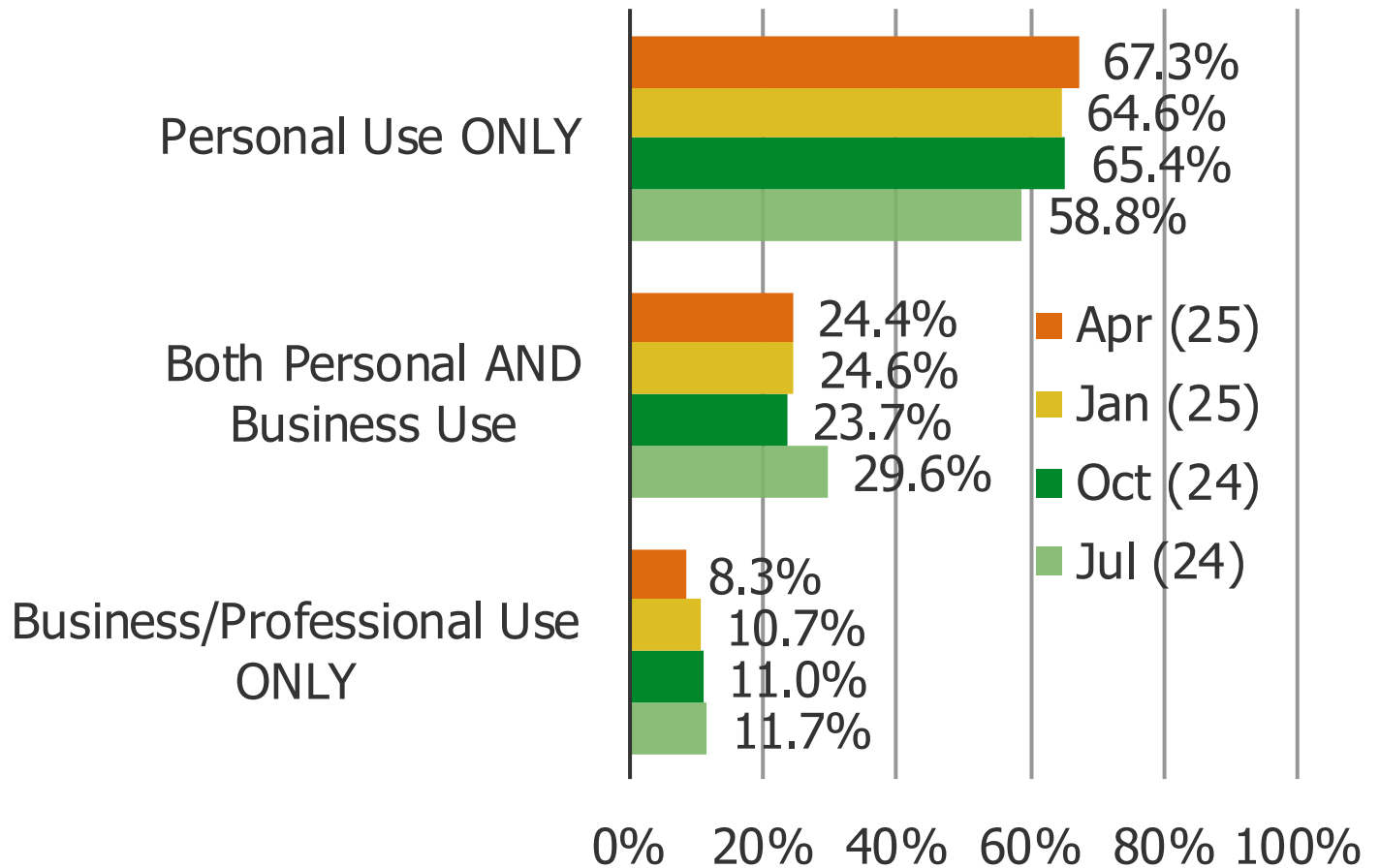


iOS Users (Time Series)



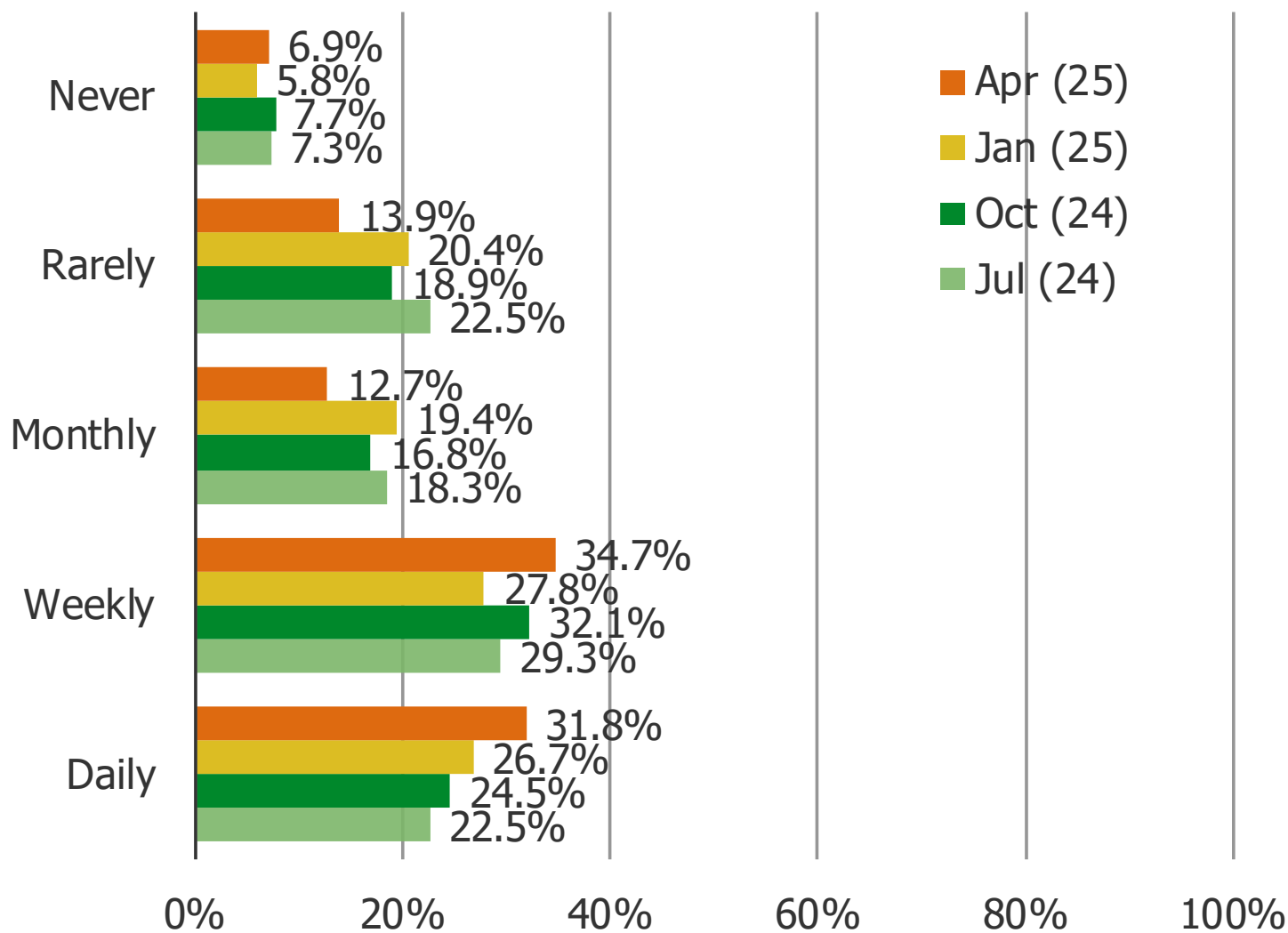
WHAT DO YOU USE AI CHATBOTS (LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, ETC) FOR?

This question was posed to respondents who use AI chatbots more than never (N = 529)



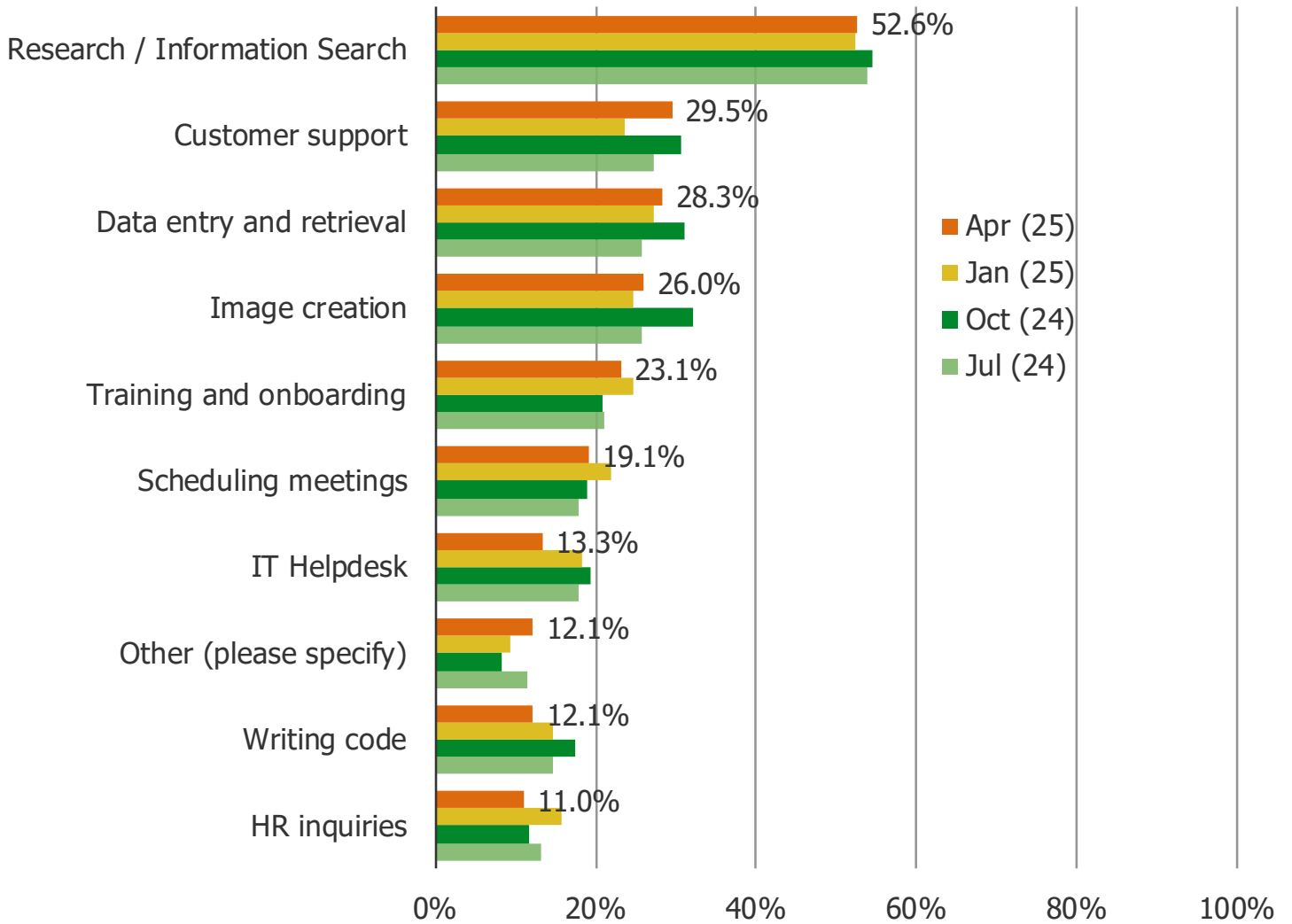
HOW FREQUENTLY DO YOU USE AI CHATBOTS AT WORK?

This question was posed to all respondents who use AI chatbots for work (N = 173)



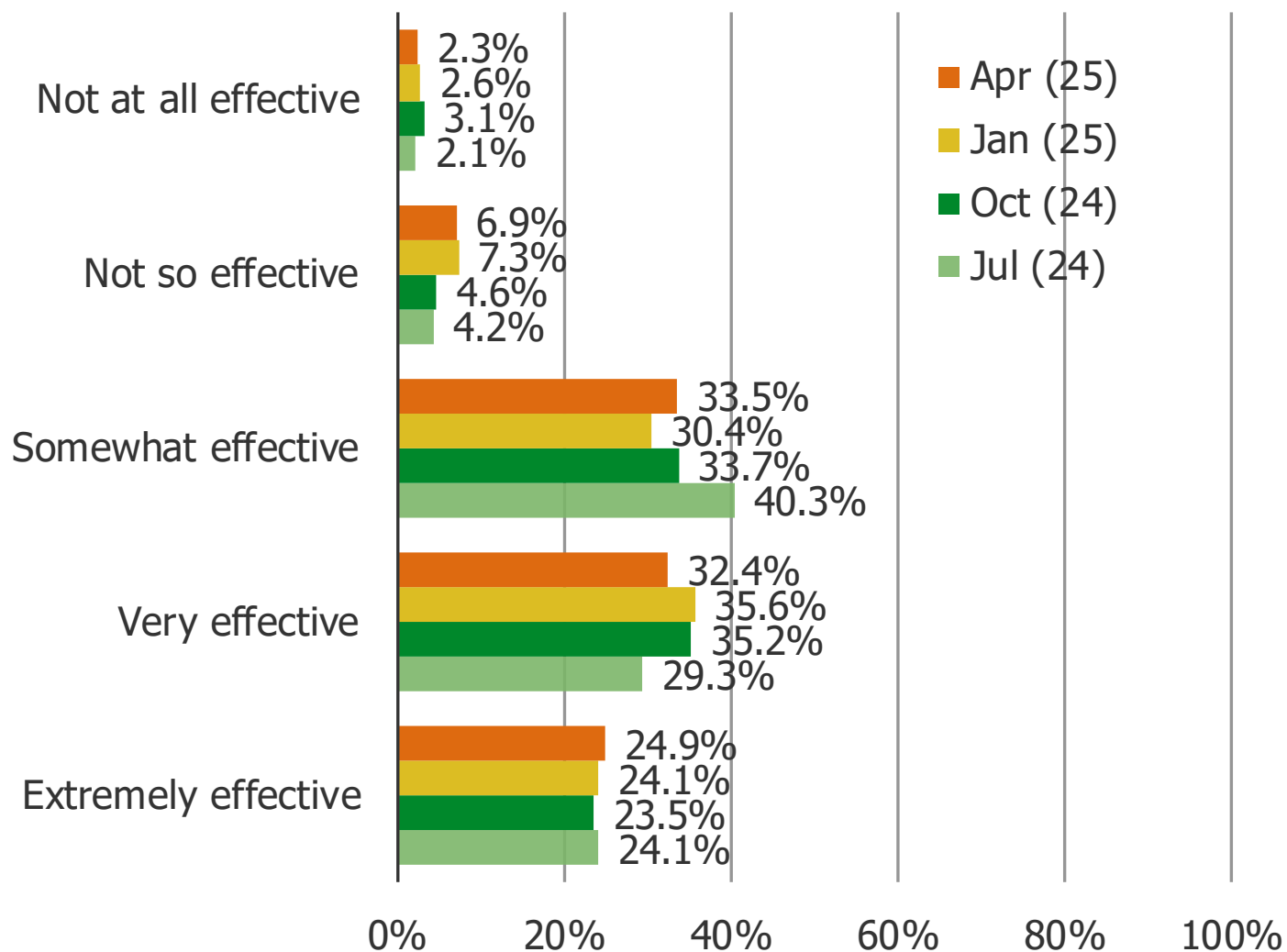
FOR WHICH TASKS DO YOU USE AI CHATBOTS AT WORK? SELECT ALL THAT APPLY

This question was posed to all respondents who use AI chatbots for work (N = 173)



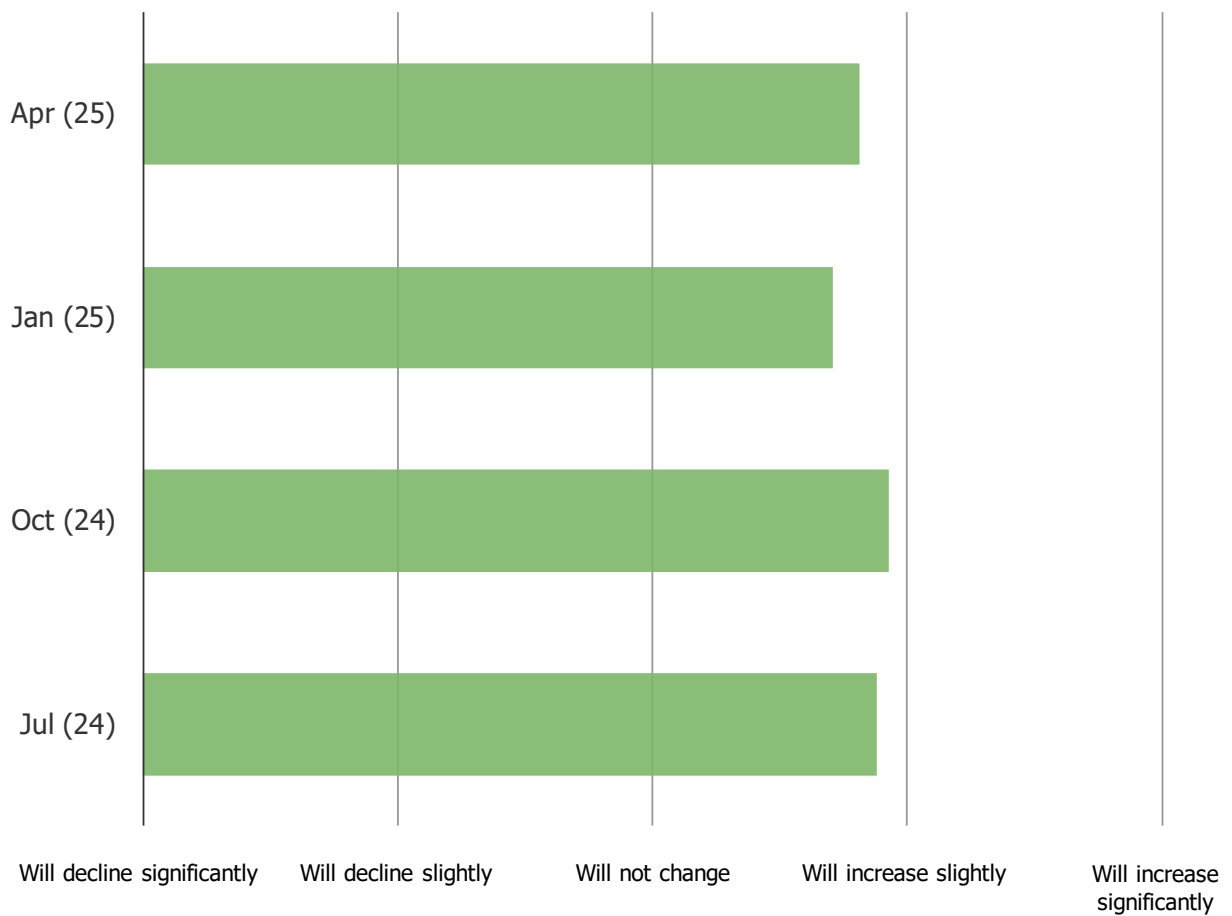
HOW EFFECTIVE ARE AI CHATBOTS IN COMPLETING THE TASKS YOU USE THEM FOR?

This question was posed to all respondents who use AI chatbots for work (N = 173)



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 = 173)



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.

Category	Count	% of Total (approx)
No expectations / No comment / Negative	460	~57%
Positive hopes / Make life easier	130	~16%
Skeptical / Concerned about AI	80	~10%
Functionality improvements (accuracy, speed, reliability)	70	~9%
Productivity / Help with tasks	50	~6%
Personalization / Smarter interaction	35	~4%
Privacy / Security concerns	20	~2%
Accessibility / Inclusion	5	<1%
Other	10	<1%

 Key Insights:

- Majority (57%) had no specific hopes, gave blank or negative responses.
- Roughly 1 in 6 respondents expressed hopeful or positive expectations for AI improving ease of use.
- A significant group (10%) expressed skepticism or fear around AI — including loss of jobs, privacy concerns, or distrust in the technology.
- A small minority mentioned accessibility or creative use cases, often in rich detail.

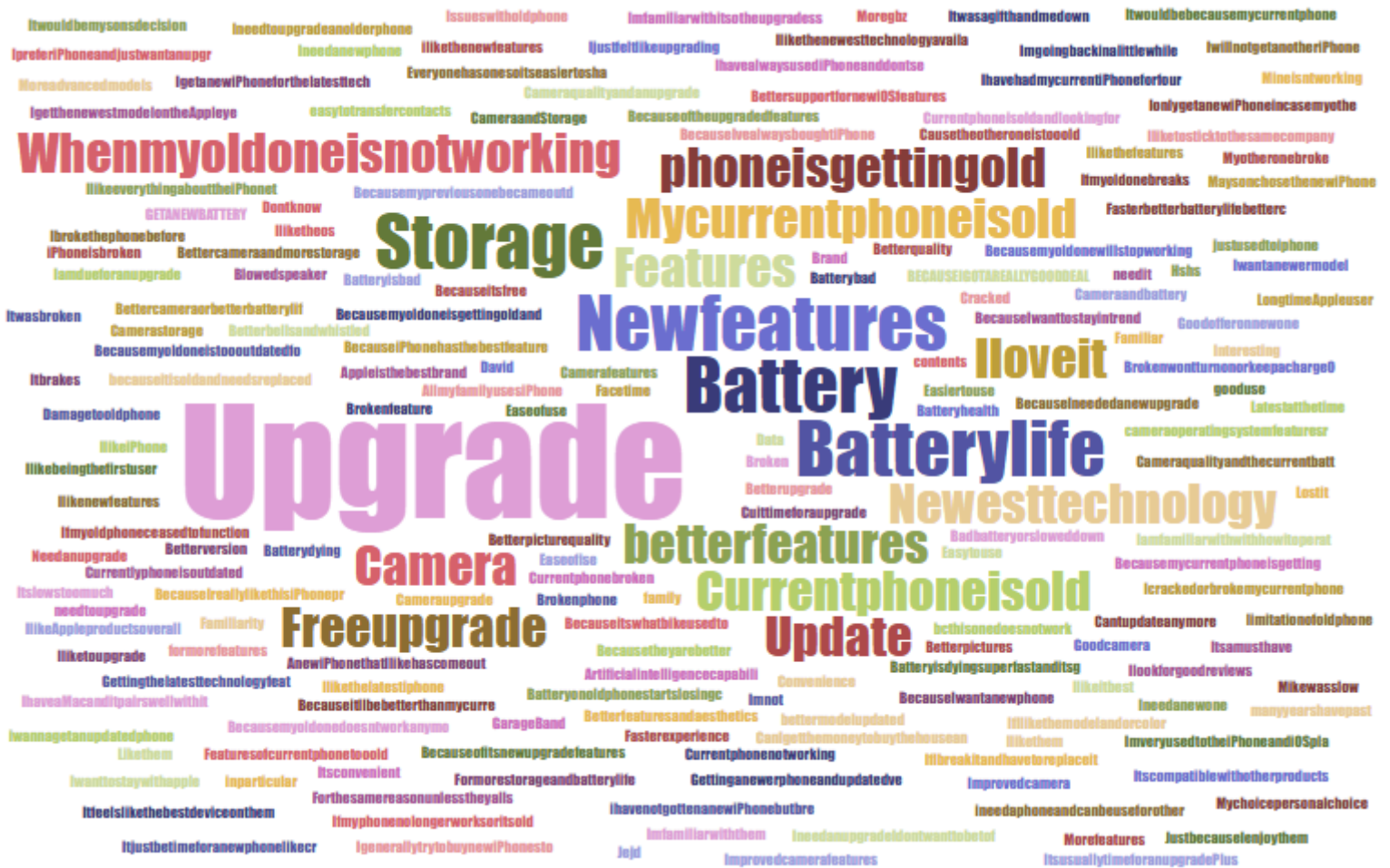
WHY DO YOU CHOOSE TO USE AN IPHONE OVER OTHER SMARTPHONE OPTIONS?

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



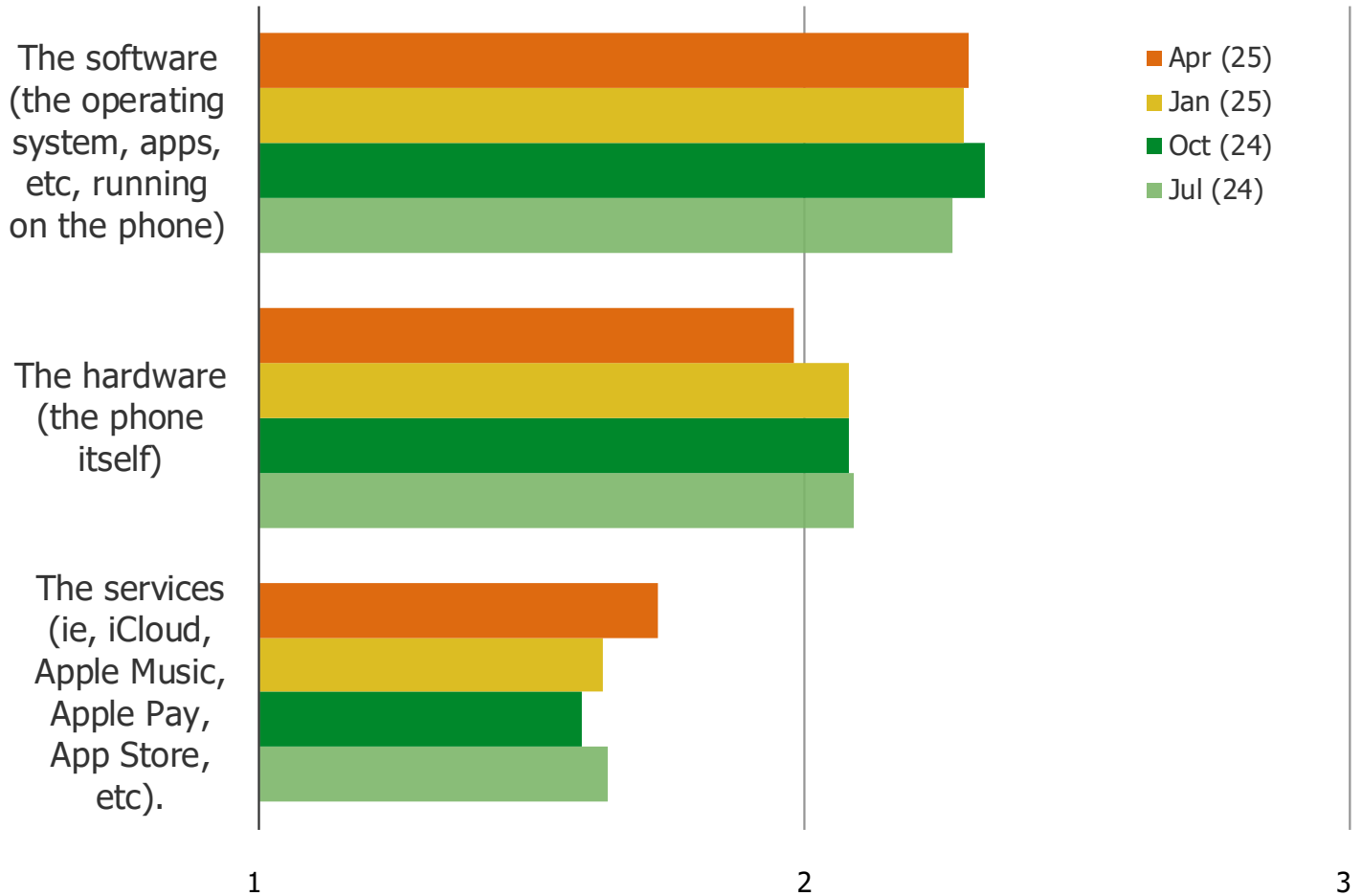
WHEN YOU GET A NEW IPHONE, WHAT IS TYPICALLY THE MAIN REASON FOR WHY YOU DECIDED TO GET A NEW IPHONE?

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



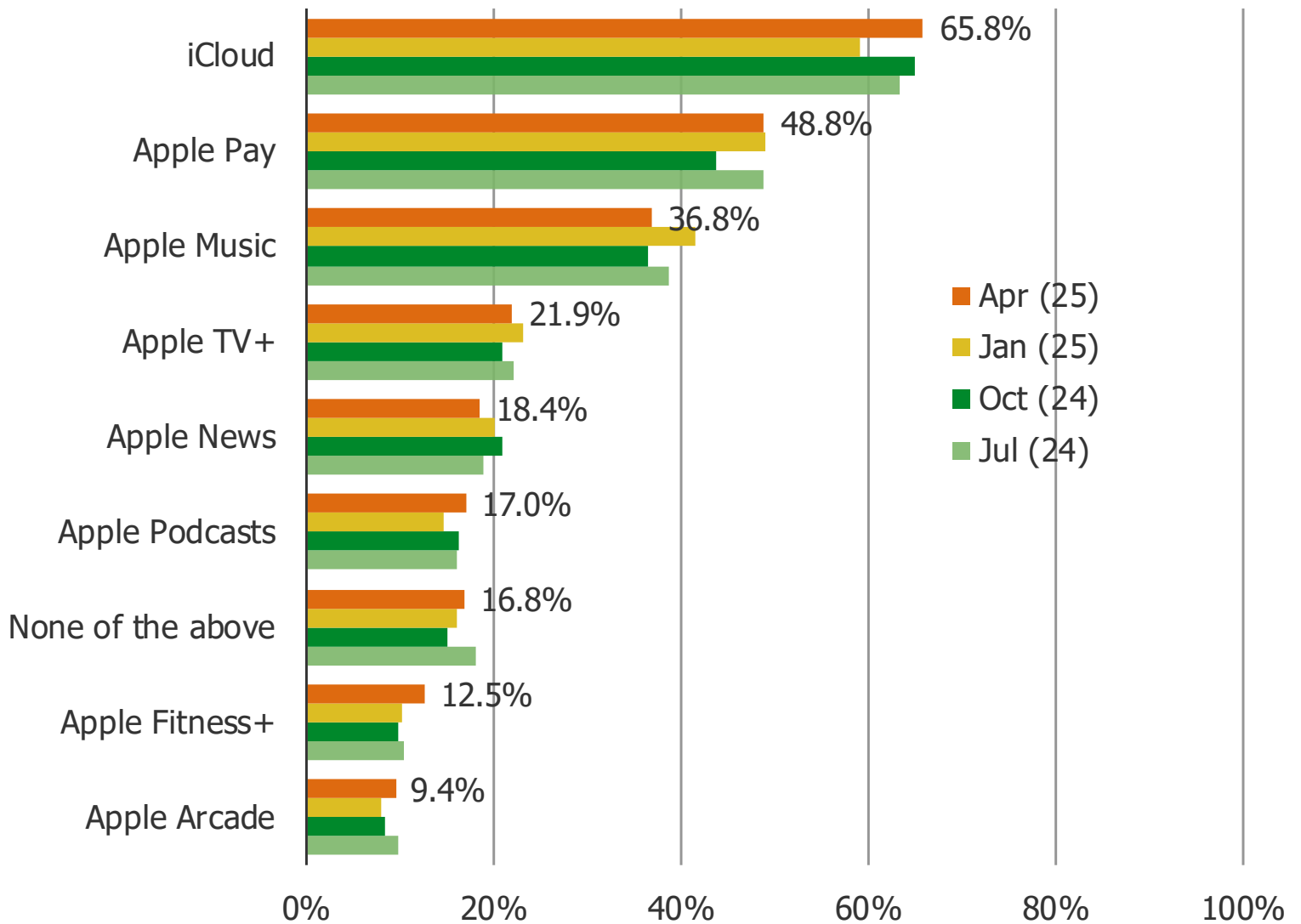
PLEASE RANK FOLLOWING IN IMPORTANCE OF WHAT DRAWS YOU TO THE APPLE ECOSYSTEM, WITH THE MOST IMPORTANT AT THE TOP?

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



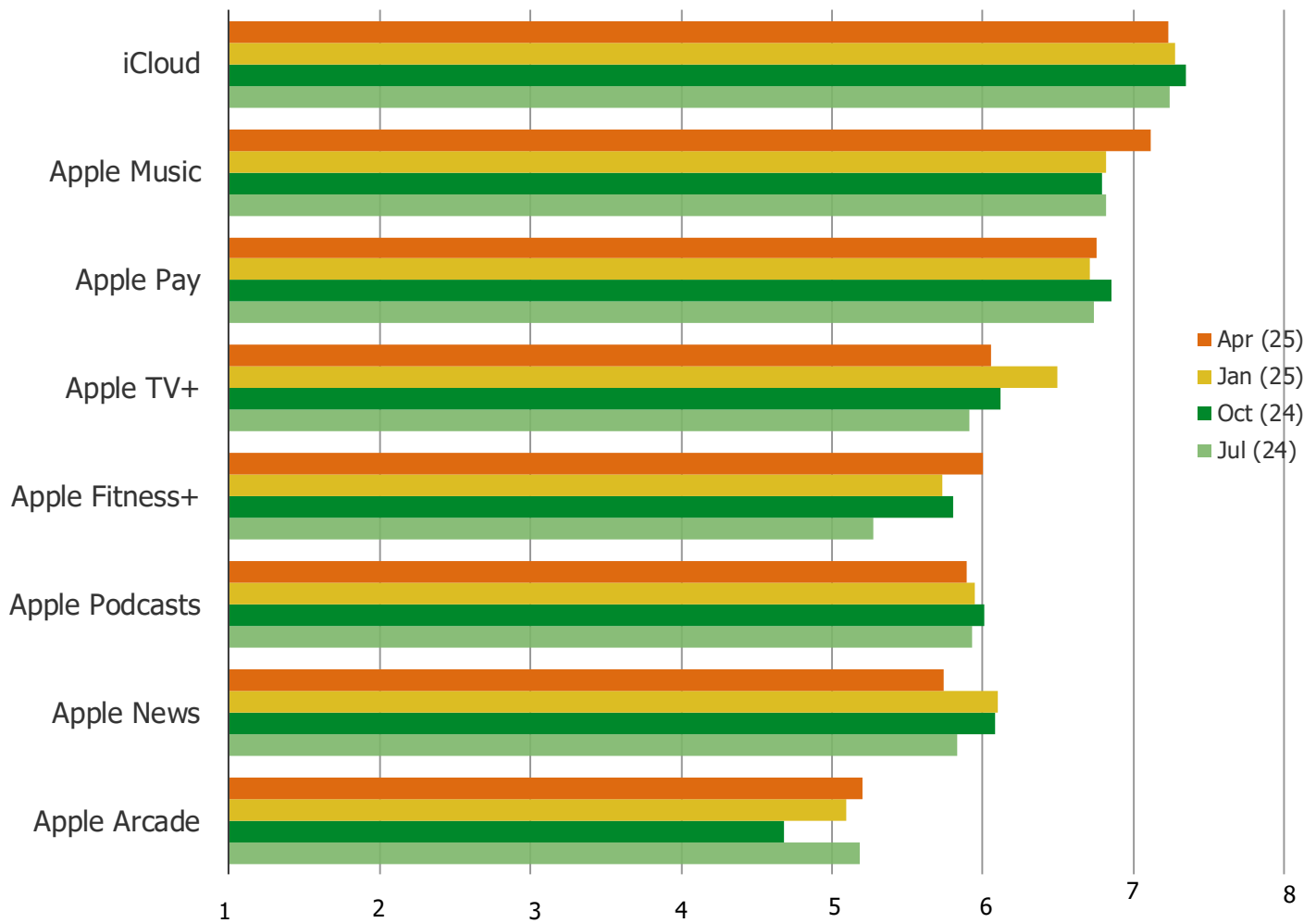
WHICH OF THE FOLLOWING APPLE SERVICES DO YOU USE? SELECT ALL THAT APPLY

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.

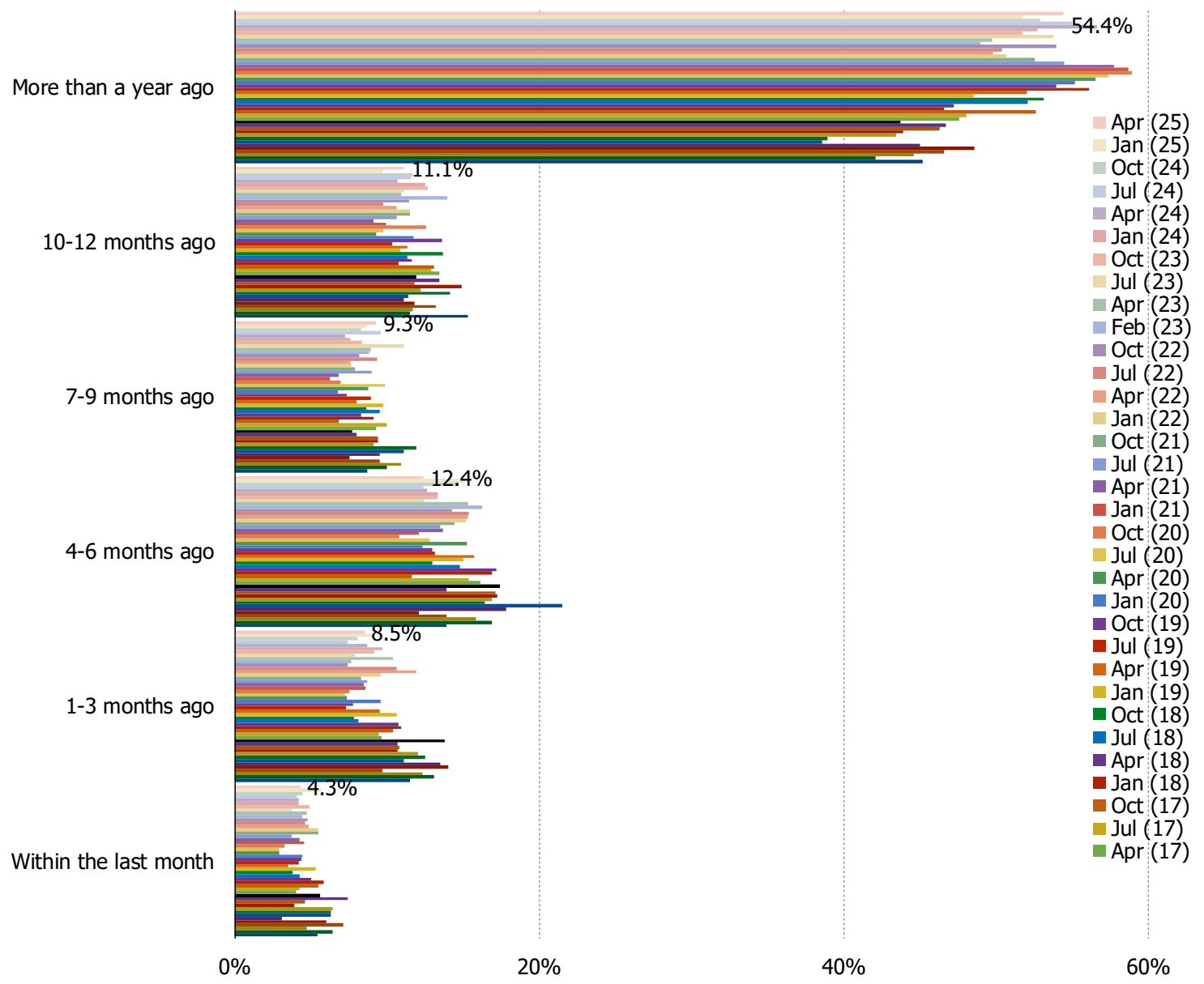
This question was posed to all respondents who are iOS users.



SMARTPHONE REFRESH CYCLES

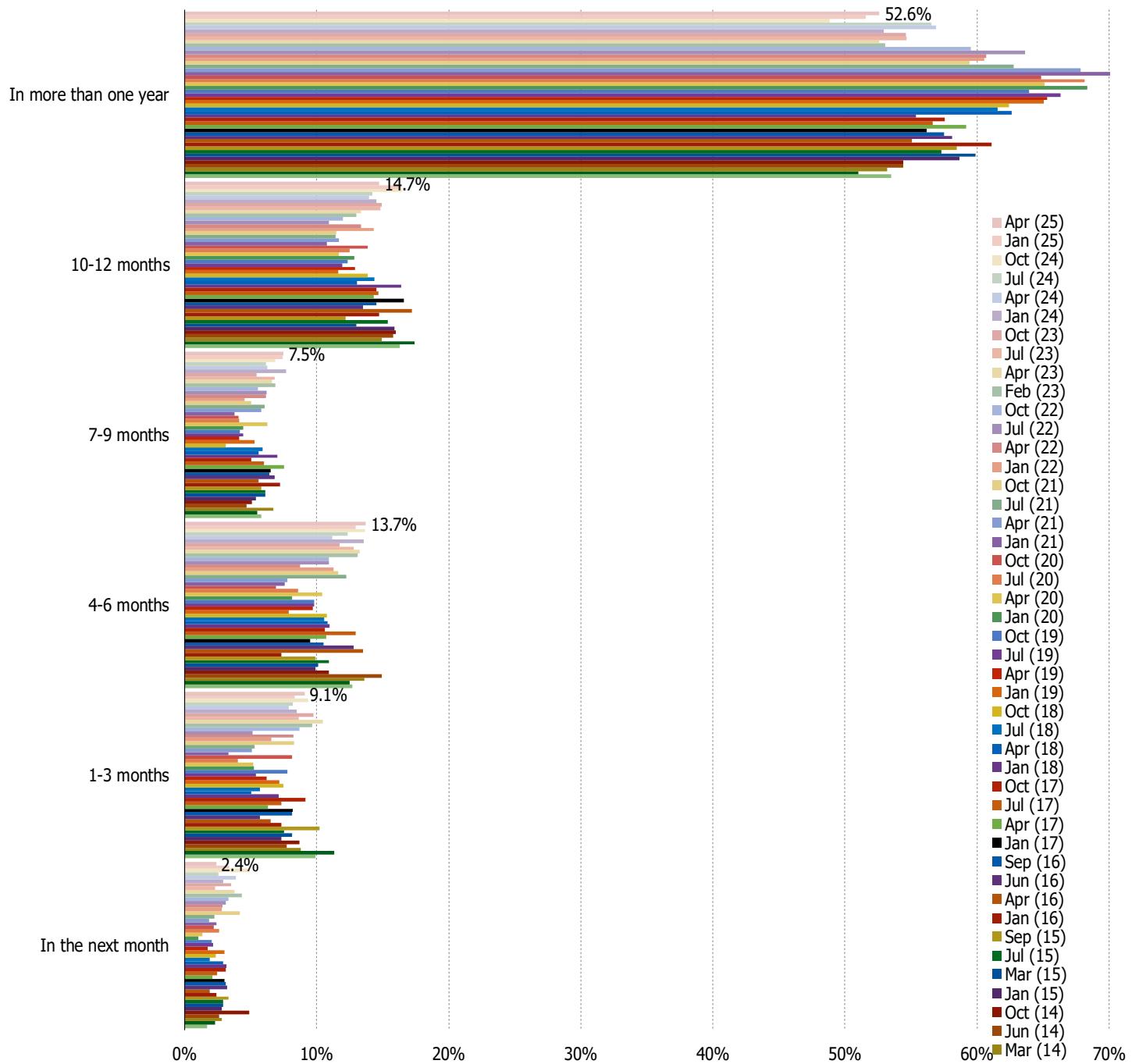
WHEN DID YOU GET YOUR CURRENT SMARTPHONE?

This question was posed to smartphone owners.



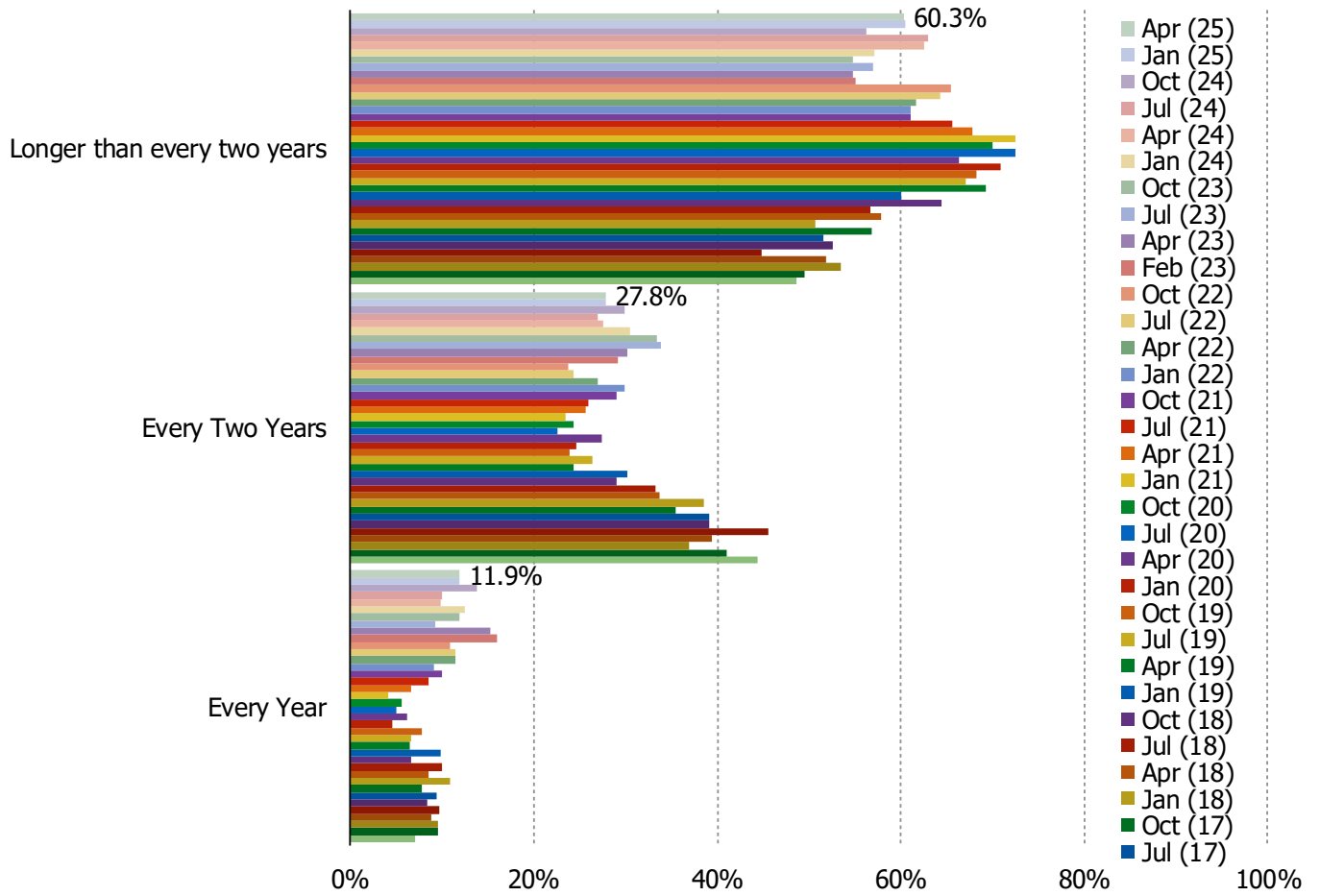
EXPECTED DATE OF NEXT SMARTPHONE PURCHASE

This question was posed to smartphone owners.



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

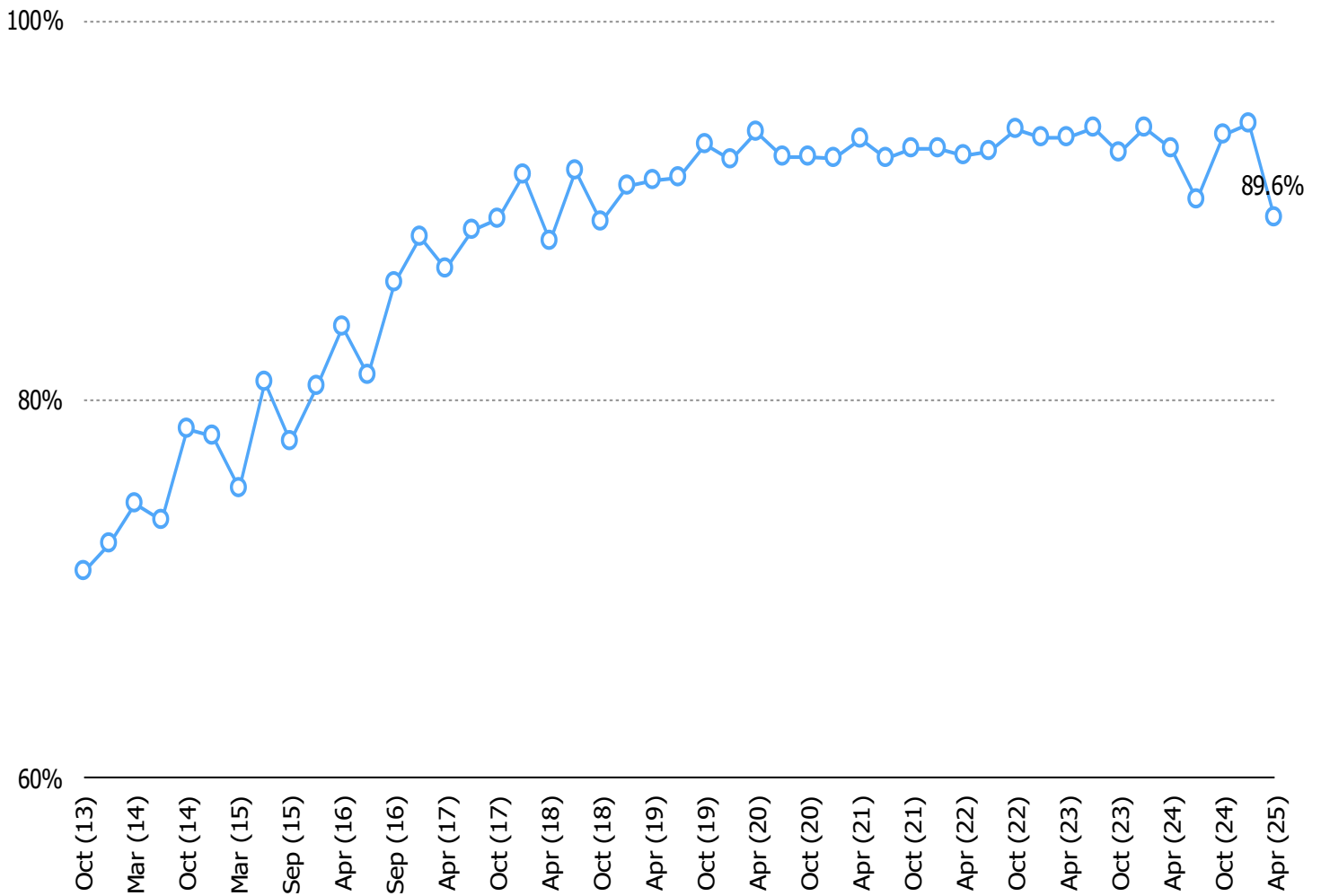
This question was posed to smartphone owners.



SMARTPHONE MARKET SHARE

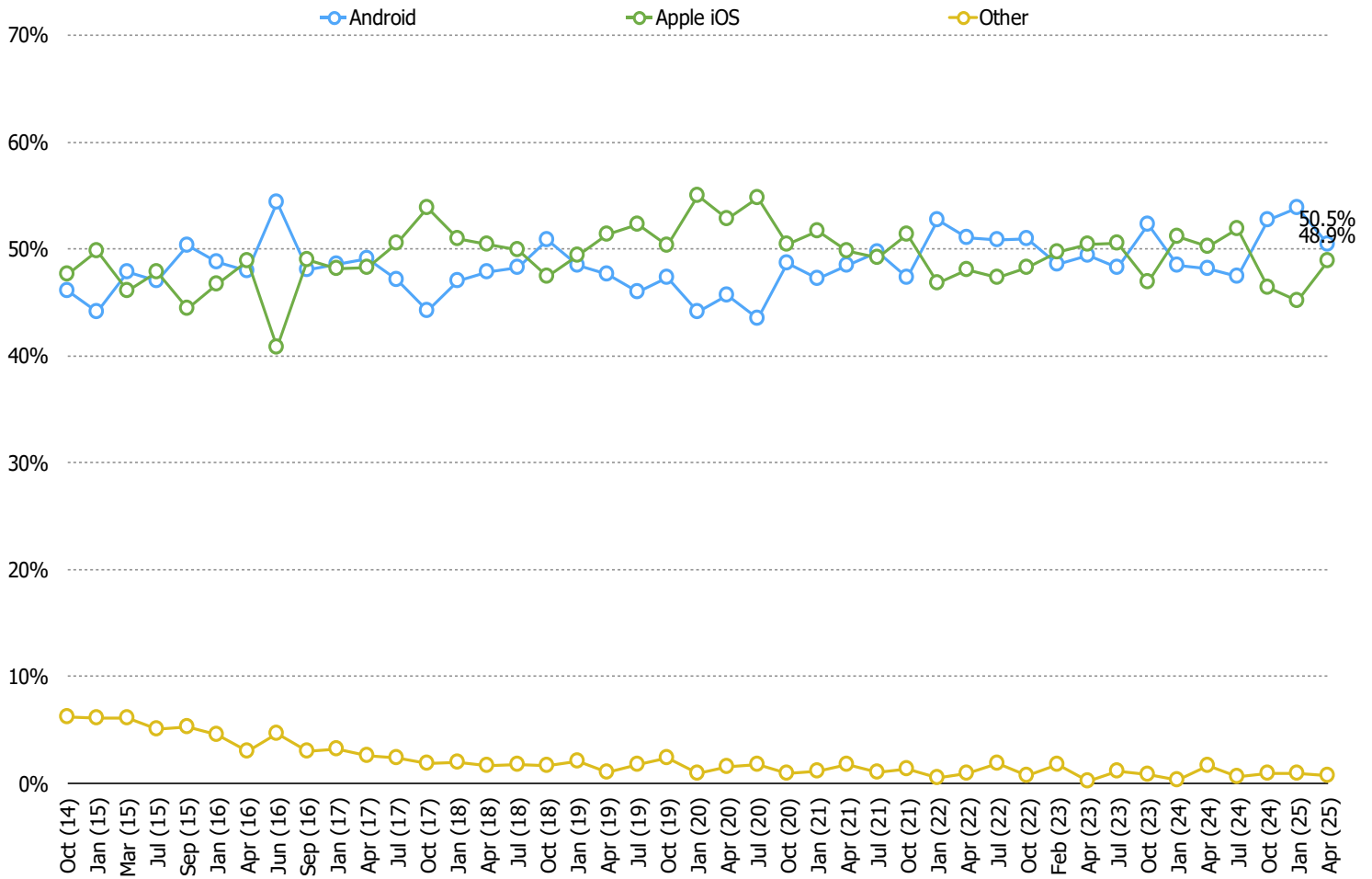
DO YOU OWN A SMARTPHONE?

This question was posed to all consumers.



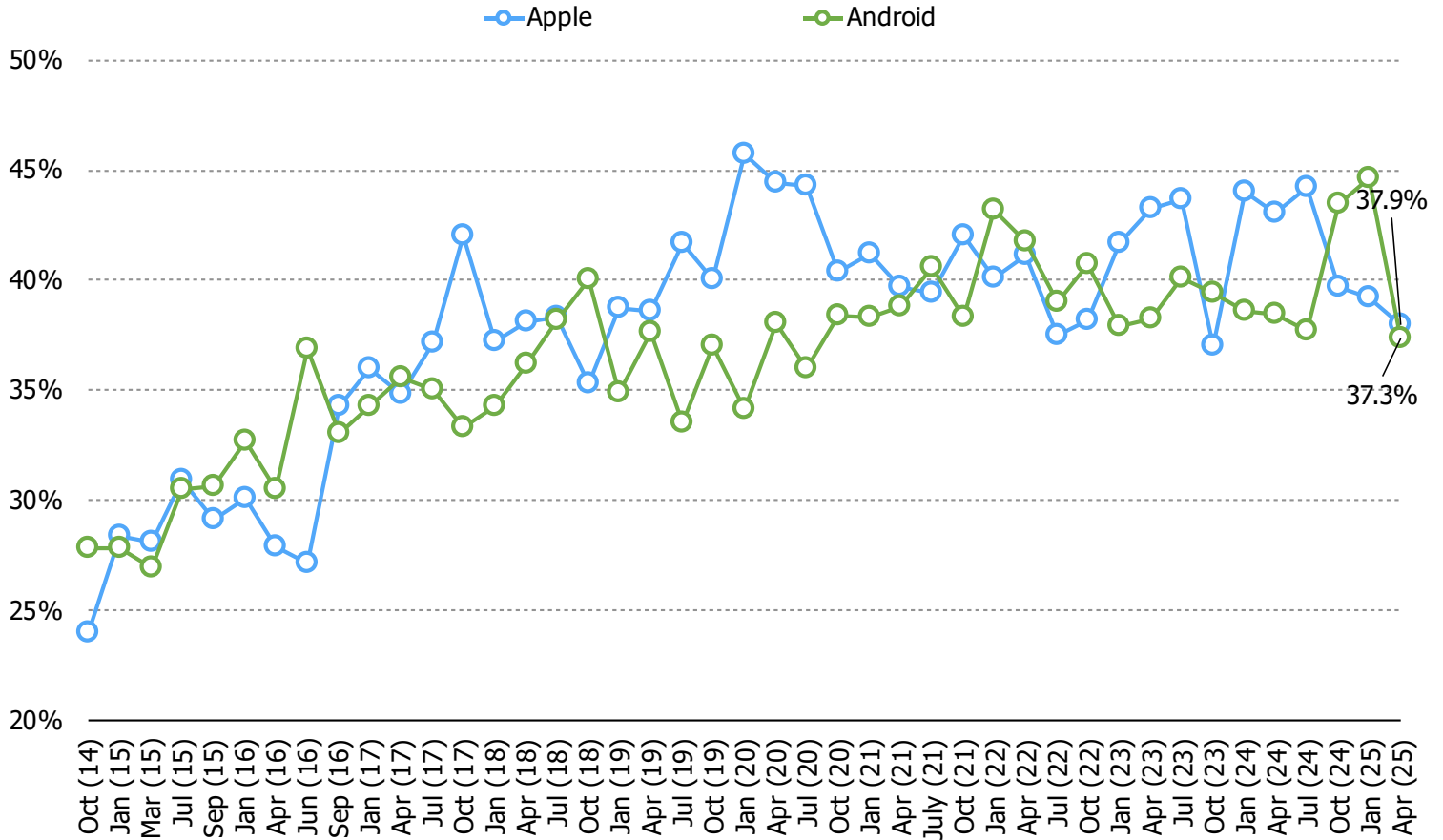
CURRENT OPERATING SYSTEM FOR SMARTPHONE

This question was posed to smartphone owners.



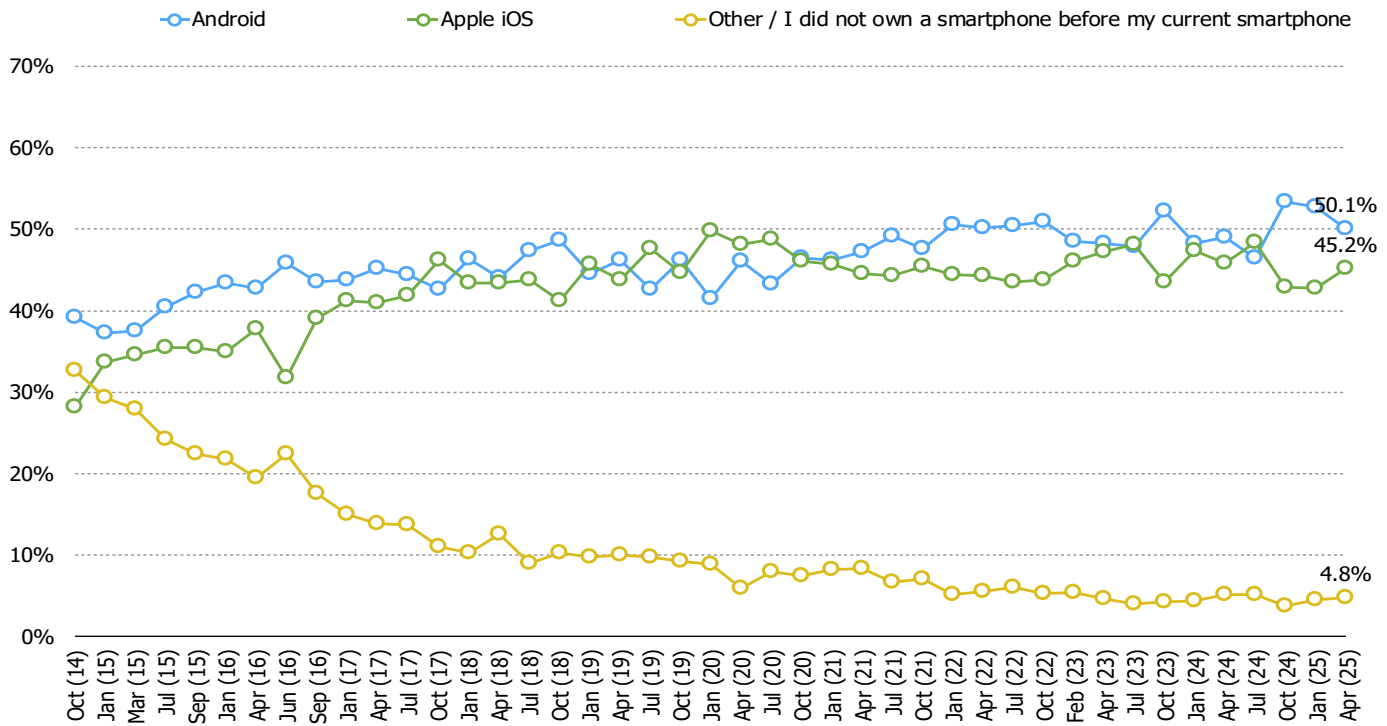
“TRIPLE PLAYS” – PERCENTAGE OF SMARTPHONE OWNERS WHO OWN THE SAME OPERATING SYSTEM FOR LAST PHONE, CURRENT PHONE, AND PLAN TO USE SAME FOR NEXT PHONE

This question was posed to smartphone owners.



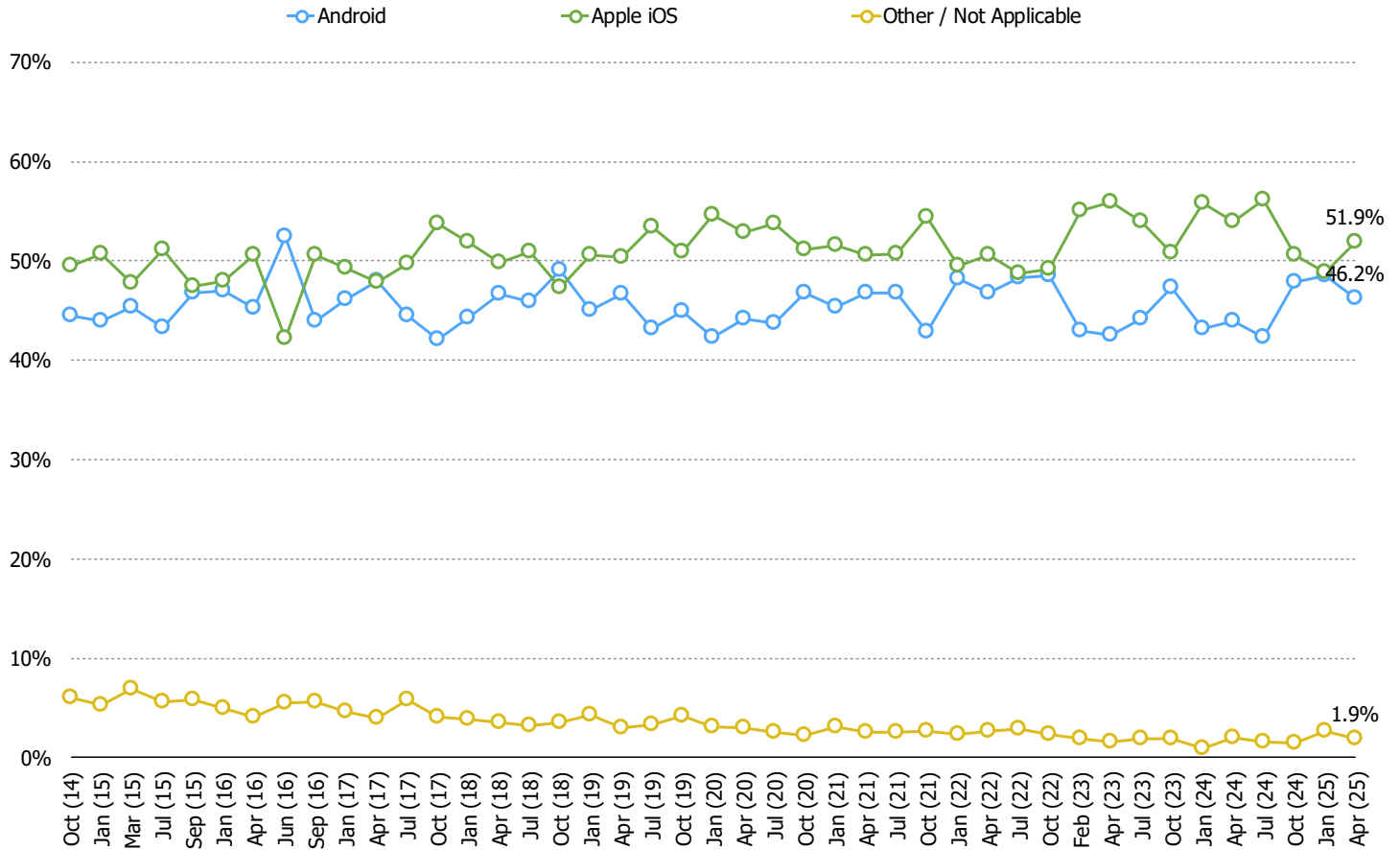
OPERATING SYSTEM FOR SMARTPHONE BEFORE CURRENT SMARTPHONE

This question was posed to smartphone owners.



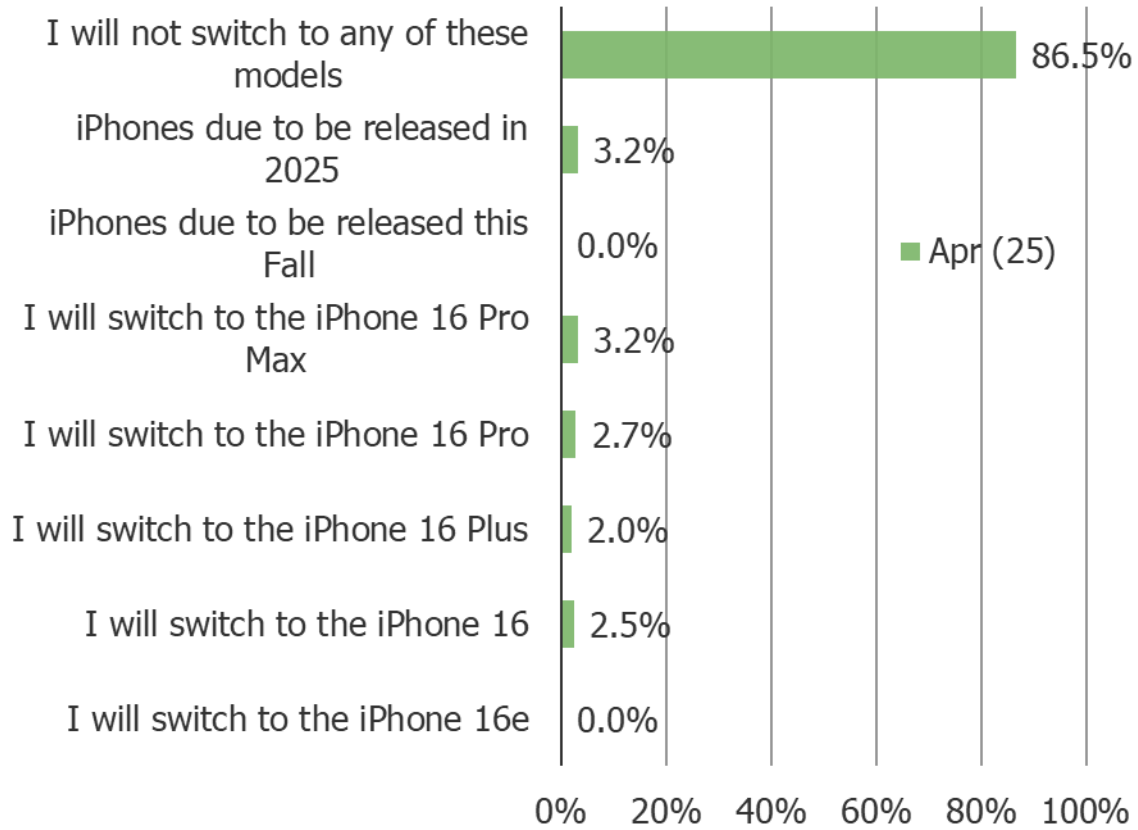
OPERATING SYSTEM FOR NEXT SMARTPHONE

This question was posed to smartphone owners.



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

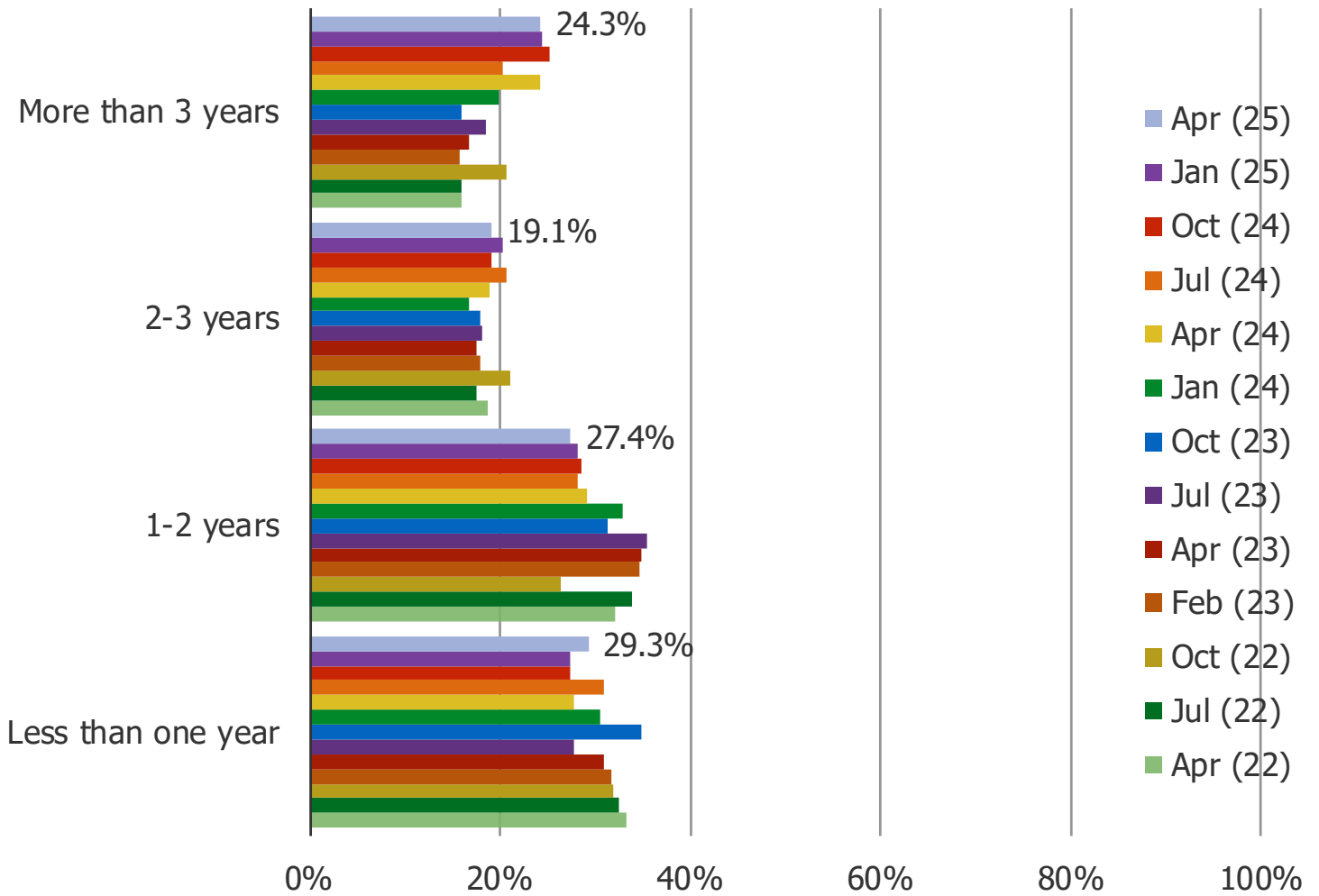
This question was posed to Android smartphone owners.



IPHONE PURCHASE PREFERENCES AND TESTING A LEASING MODEL

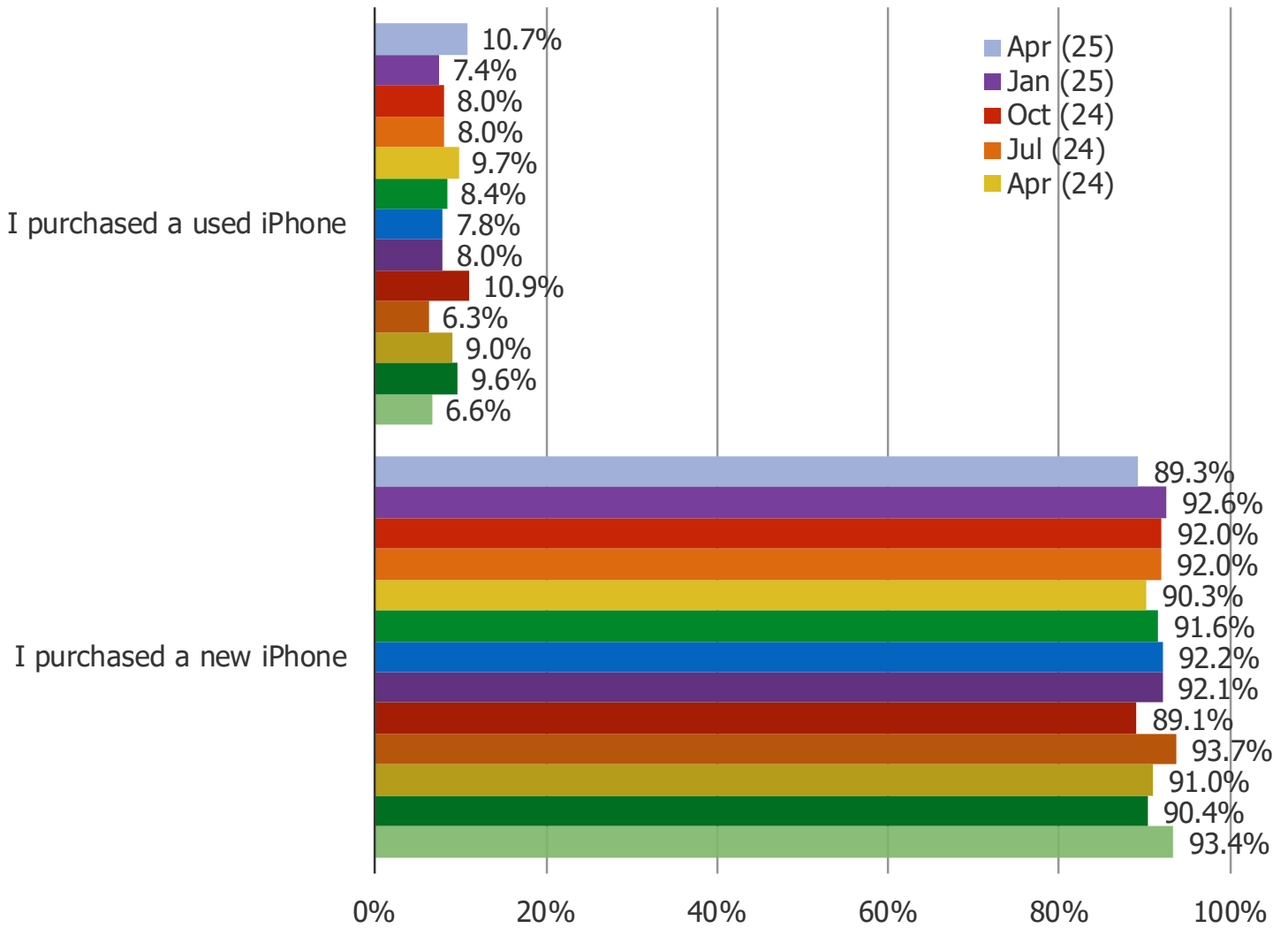
FOR HOW LONG HAVE YOU OWNED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



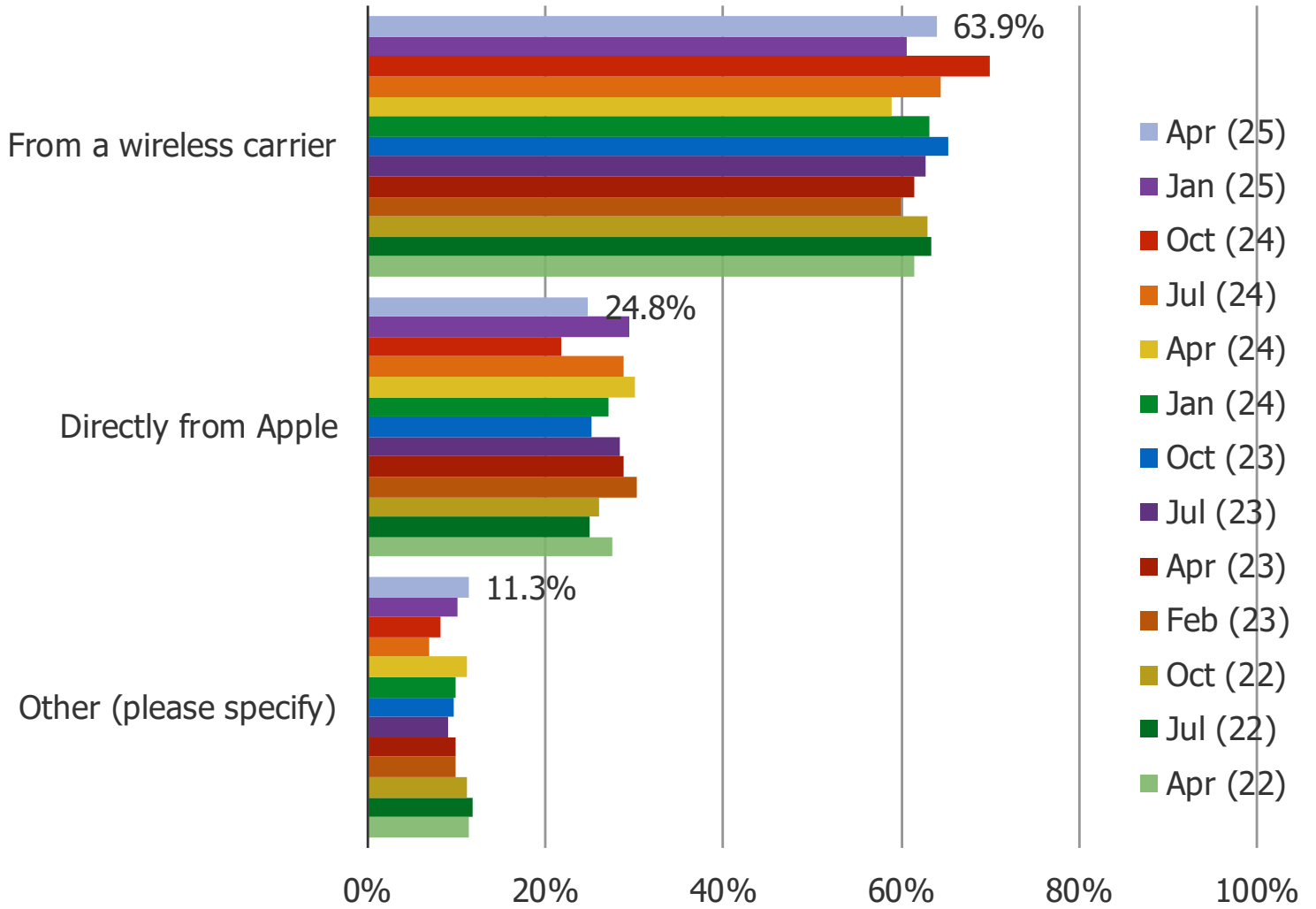
HOW DID YOU PURCHASE YOUR IPHONE?

This question was posed to iPhone owners.



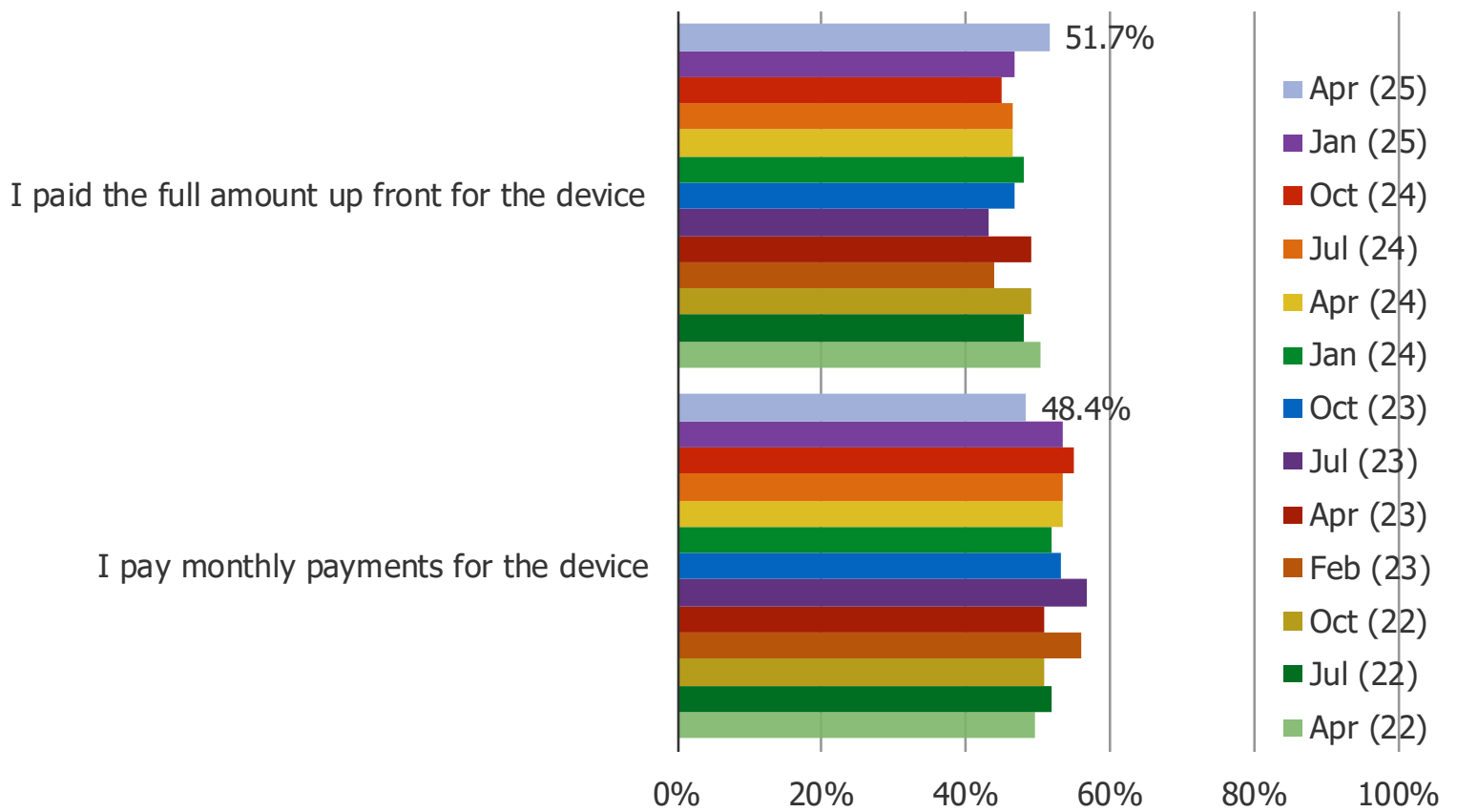
HOW DID YOU PURCHASE YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



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

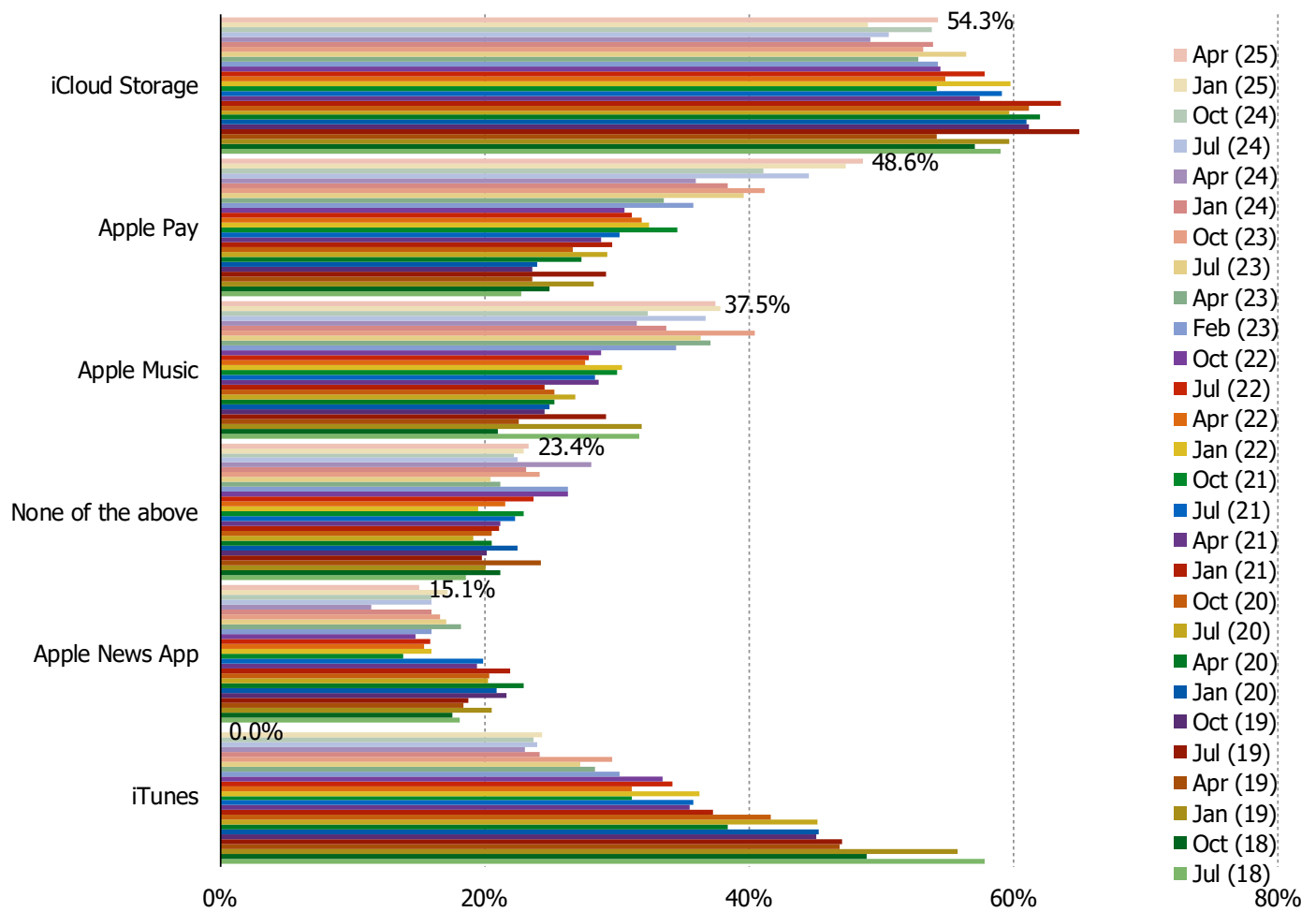
This question was posed to iPhone owners.



AAPL PAY QUESTIONS

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

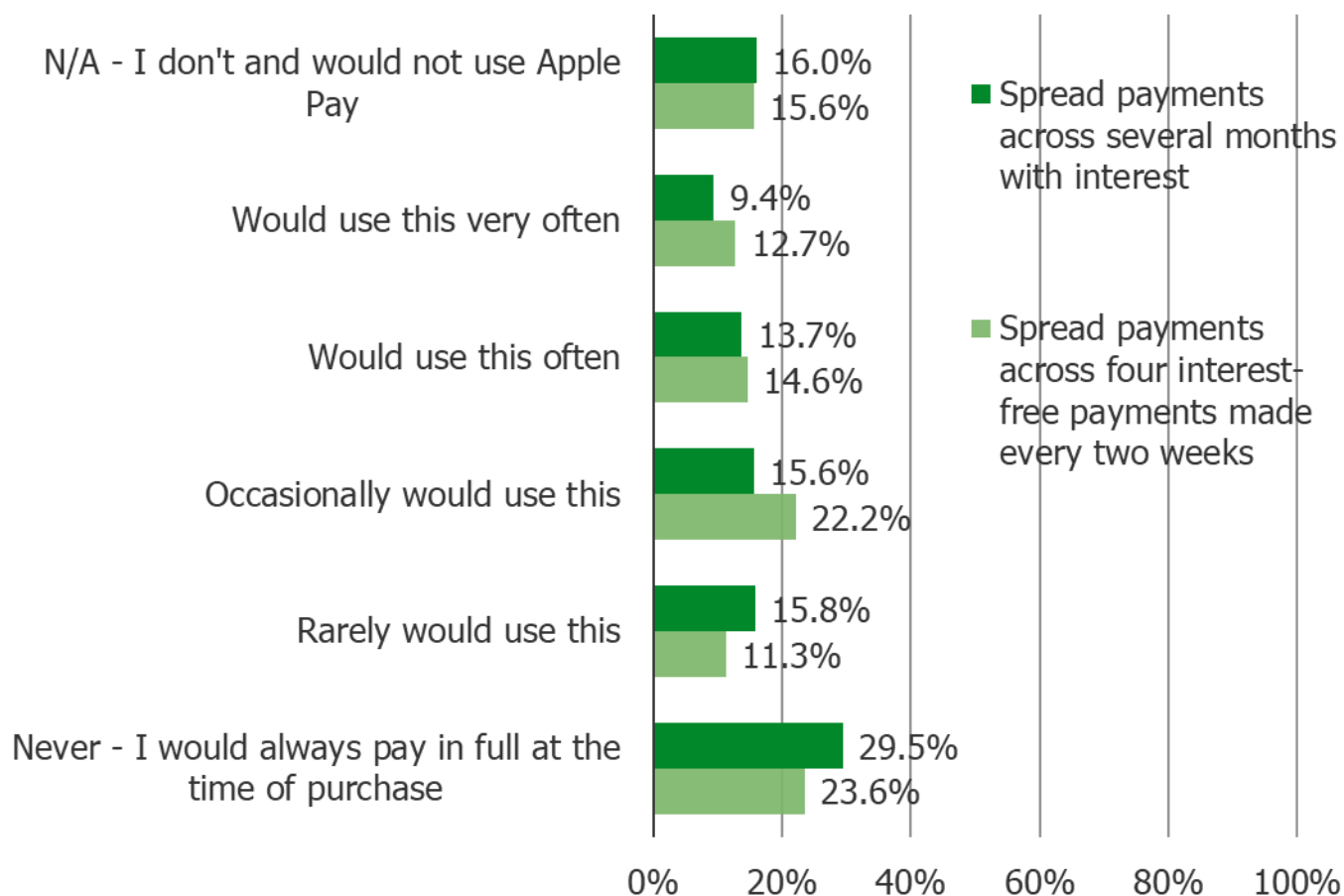
This question was posed to iPhone owners.



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.

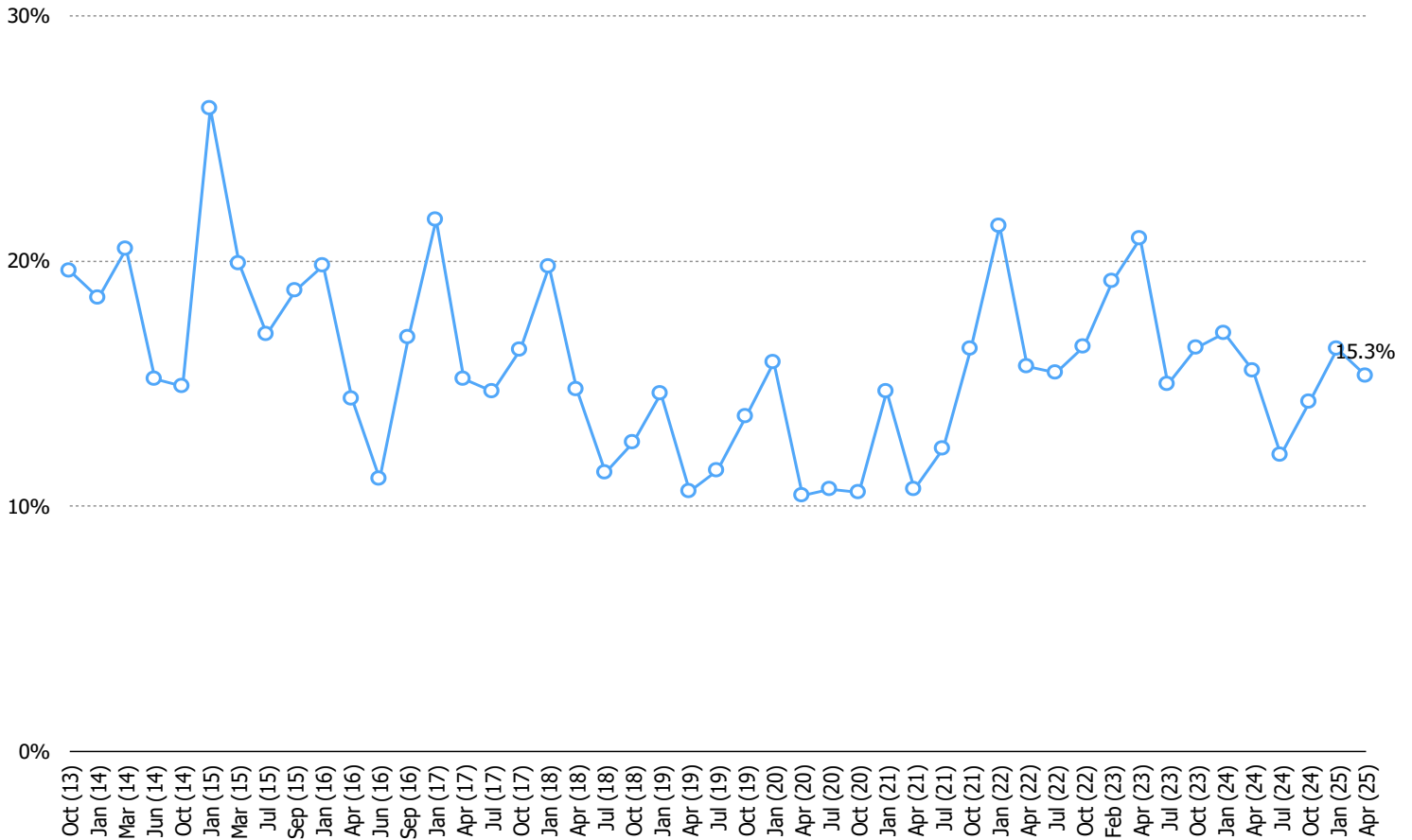
APRIL 2025



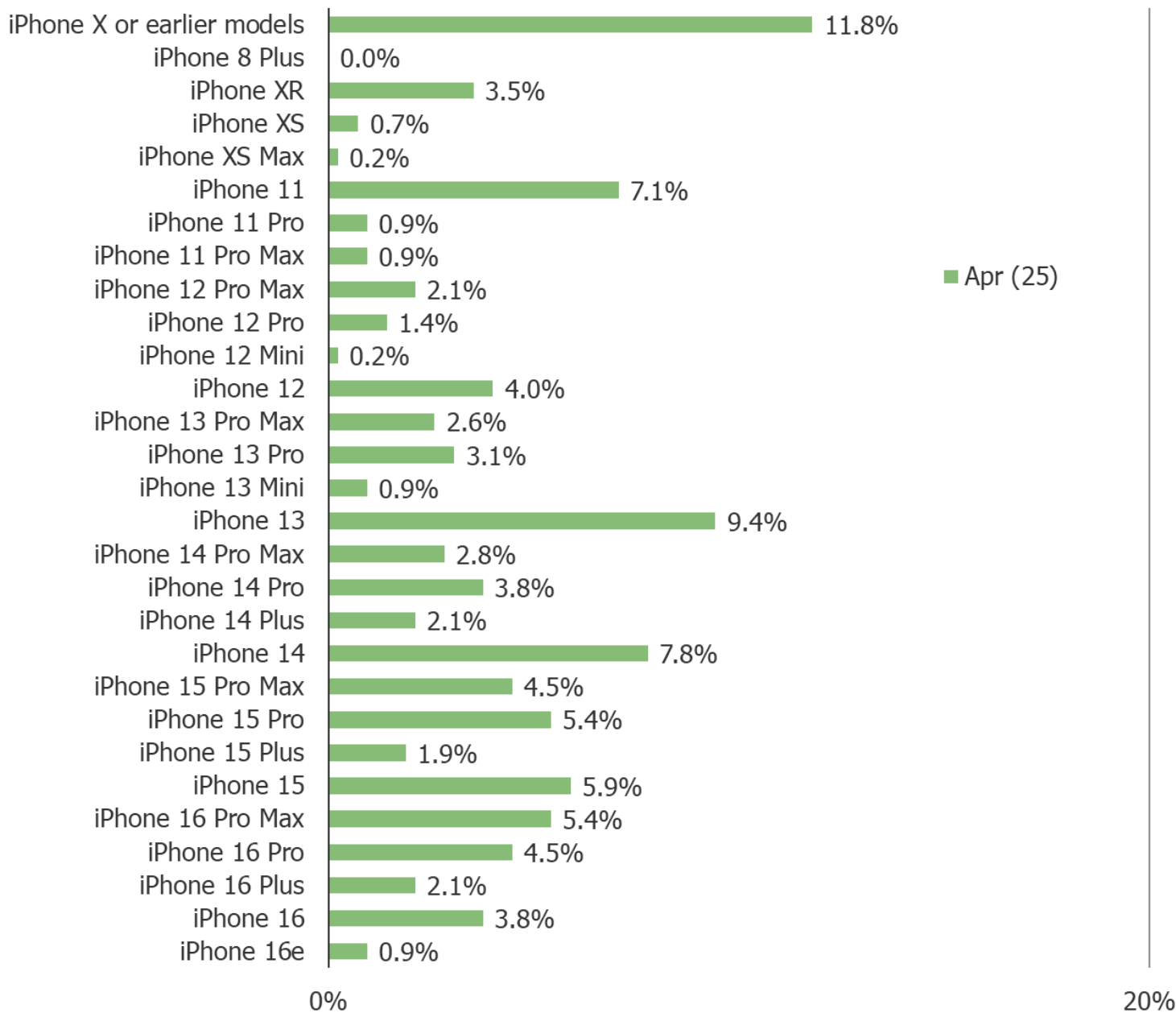
IPHONE DYNAMICS

GOT IPHONE WITHIN PAST THREE MONTHS

This question was posed to iPhone owners.

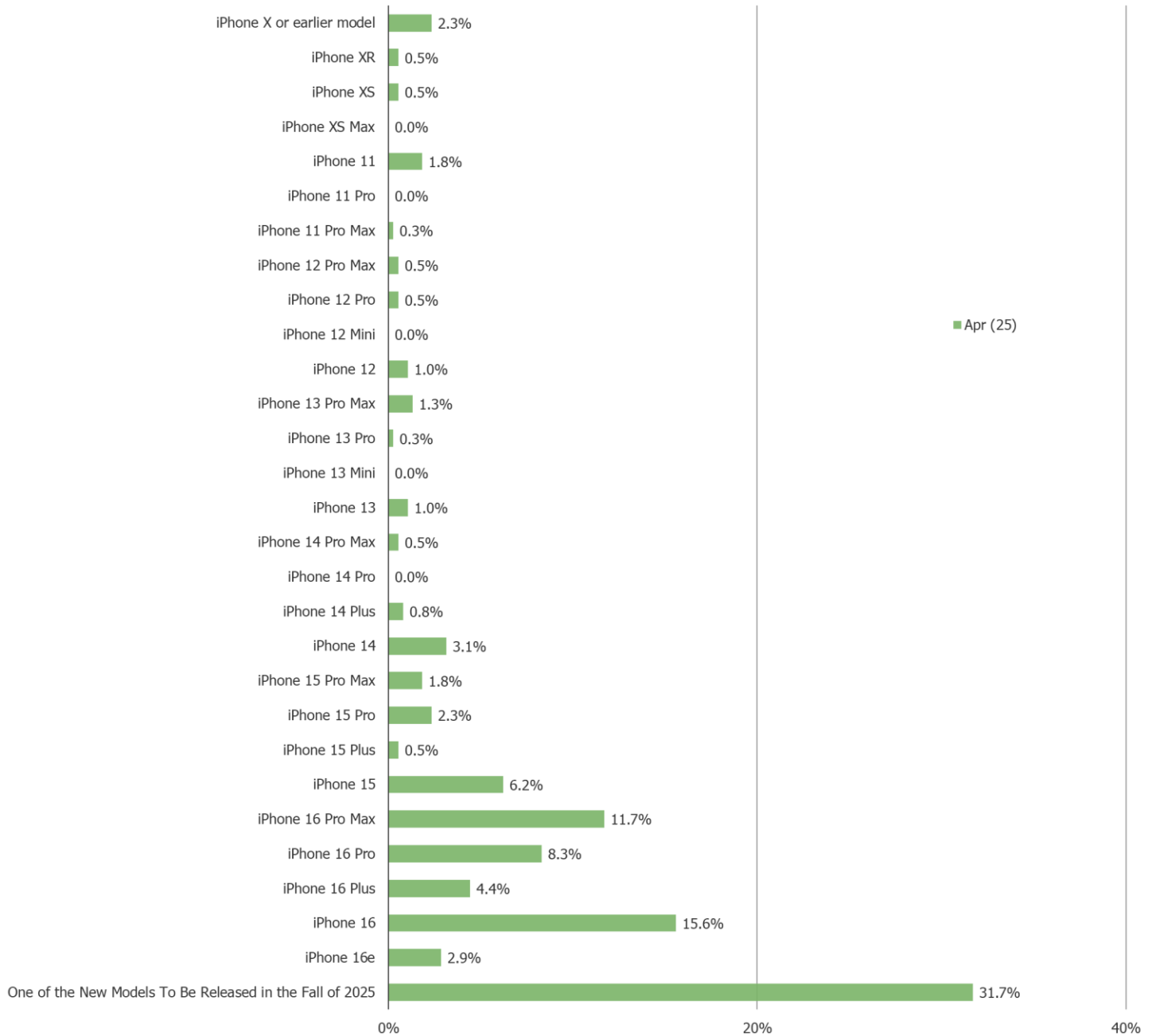


IPHONE MIX – WHICH MODEL DO YOU CURRENTLY OWN?



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?

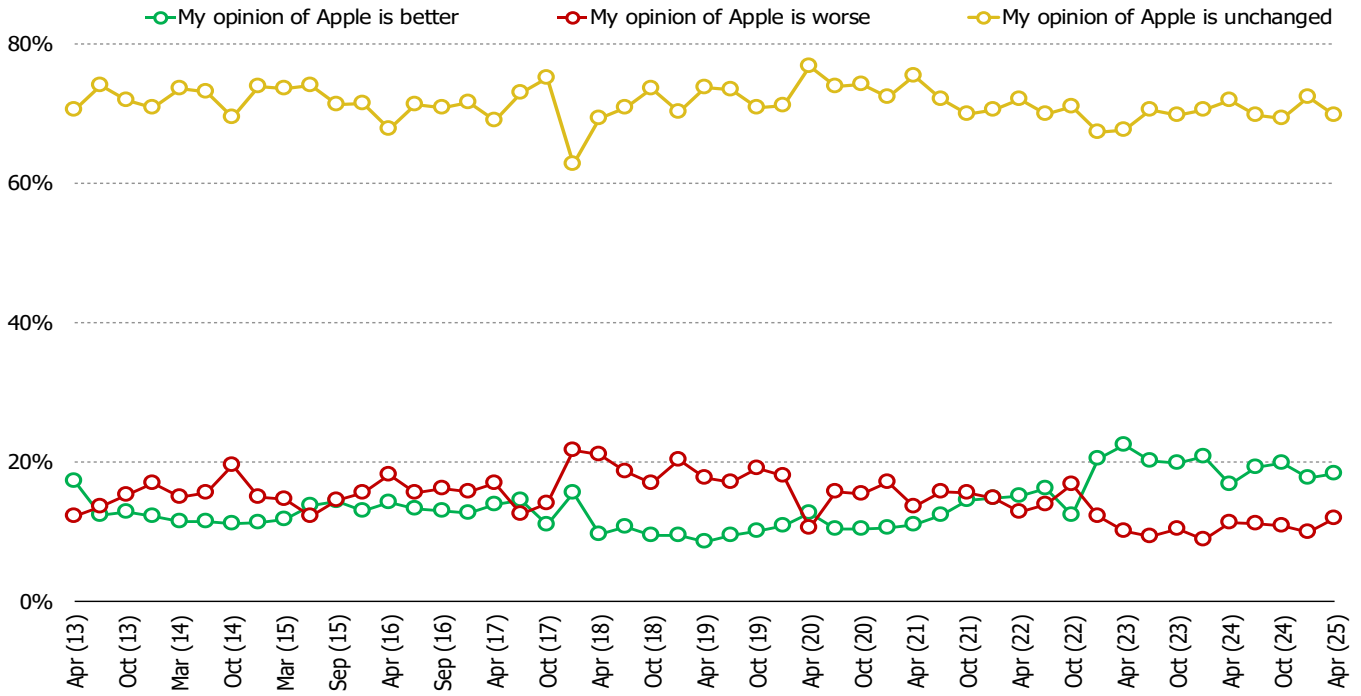
This question was posed to smartphone owners.



CONSUMER SENTIMENT

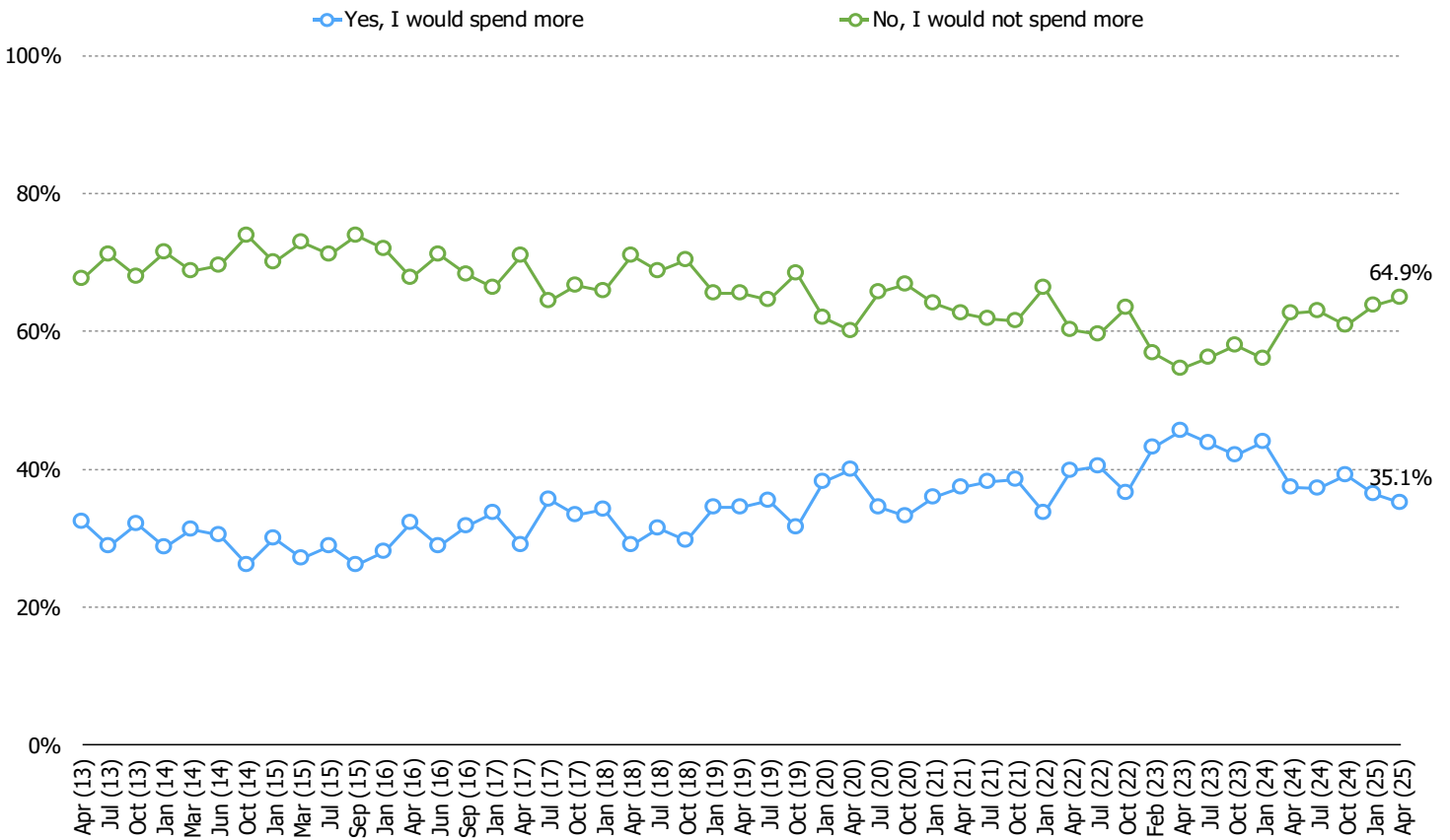
HAS YOUR OPINION OF APPLE CHANGED OVER THE PAST YEAR?

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.

