

# Bespoke Survey Research

July 2025

## Consumer Electronics

Volume 50 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: AAPL, AMZN, GOOG, Samsung.

### **Key Takeaways:**

- ❑ Most consumers prefer to go in-person to buy a new smartphone, but the share who prefers to order it online has edged higher since the beginning of this year.
- ❑ There is some interest in a foldable iPhone among iPhone owners (more interest if it folds up and down, like a traditional flip phone). 8.2% said they would definitely get it and another 28.9% said they probably would get it.
- ❑ New iPhone camera features remains the top driver for those who are interested in one of the newest iPhones just released. 22% of these respondents said they are interested because of the AI features. This reading is slightly lower than two prior readings and is the third most popular reason selected.
- ❑ Apple Intelligence interest is moderate at 3/5 and is basically flat q/q and y/y. There were two waves in which interest was modestly higher (Oct 24 and Jan 25), but for the most part the weighted average has come in a touch above neutral.
- ❑ Despite interest in Apple Intelligence (explained to respondents) hovering around neutral, interest in using AI chatbots and apps while using a smartphone and laptop has increased over recent history in our survey (January 2024 through present).
- ❑ Consumer usage of AI chatbots continues to increase in our survey (users over-index to iOS users, higher income respondents, younger respondents, and males).
- ❑ Among those who use AI chatbots at work, usage frequency has ramped higher over the past year (ie, % using them daily has increased). The top use case is research / info search, followed by data entry and retrieval, customer support, and image creation. Feedback on how effective AI chatbots are at completing tasks is very positive. As of now, most employees aren't expecting AI to have an impact on their company's need for their role in the next 2-3 years.
- ❑ Consumer hopes for AI have evolved over time. Initially in 2023 the themes behind verbatims circled around convenience and curiosity. Then through late 2023 and 2024 we observed an increased in utility in the workplace and in healthcare. Use cases in 2025 have become more solidified with mentions of "personal assistant", "help with health", and "less stress" growing.
- ❑ iPhone trends related to market share and purchase recency were constructive in our charts. Feedback around services (iCloud, Apple Pay, and Apple Music) all improved sequentially.

# IPHONE DYNAMICS

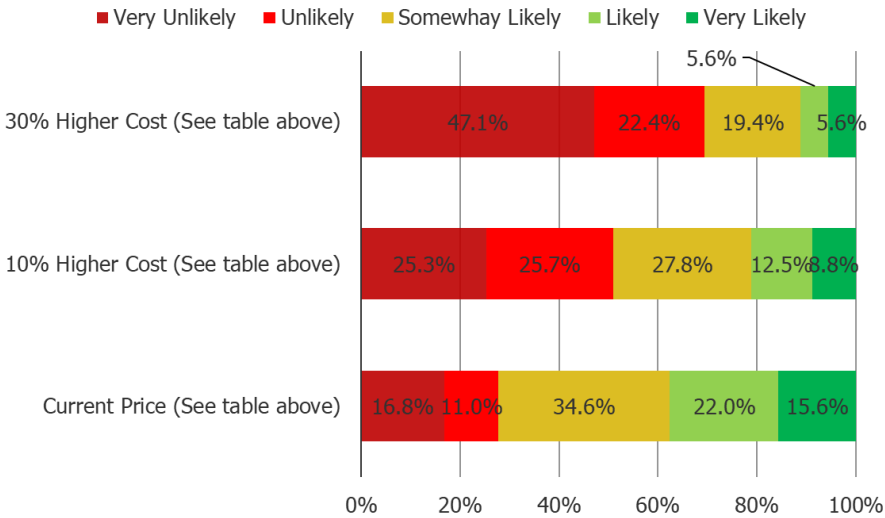
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IMAGINE YOU DECIDED TO GET A NEW IPHONE TODAY, HOW LIKELY WOULD YOU BE TO ACTUALLY BUY THE MODEL THAT YOU WOULD TYPICALLY CHOOSE IF PRICES WERE...

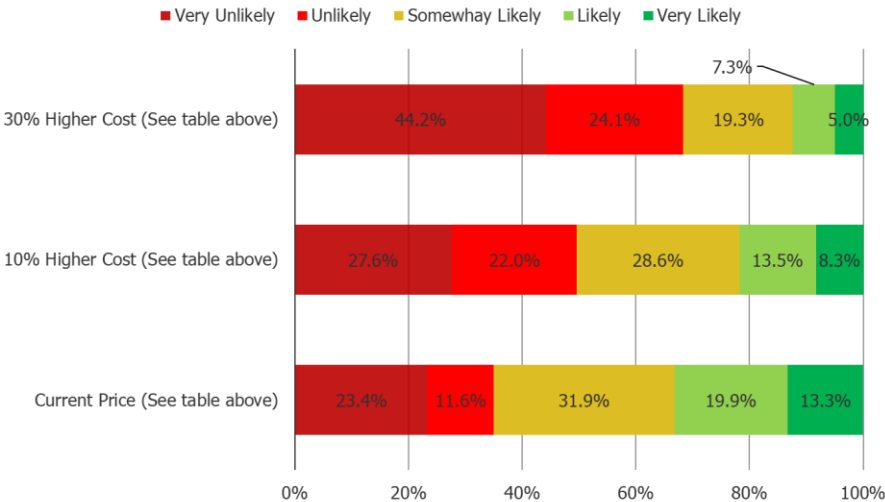
This question was posed to iPhone owners (N = 500+)

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

July 2025



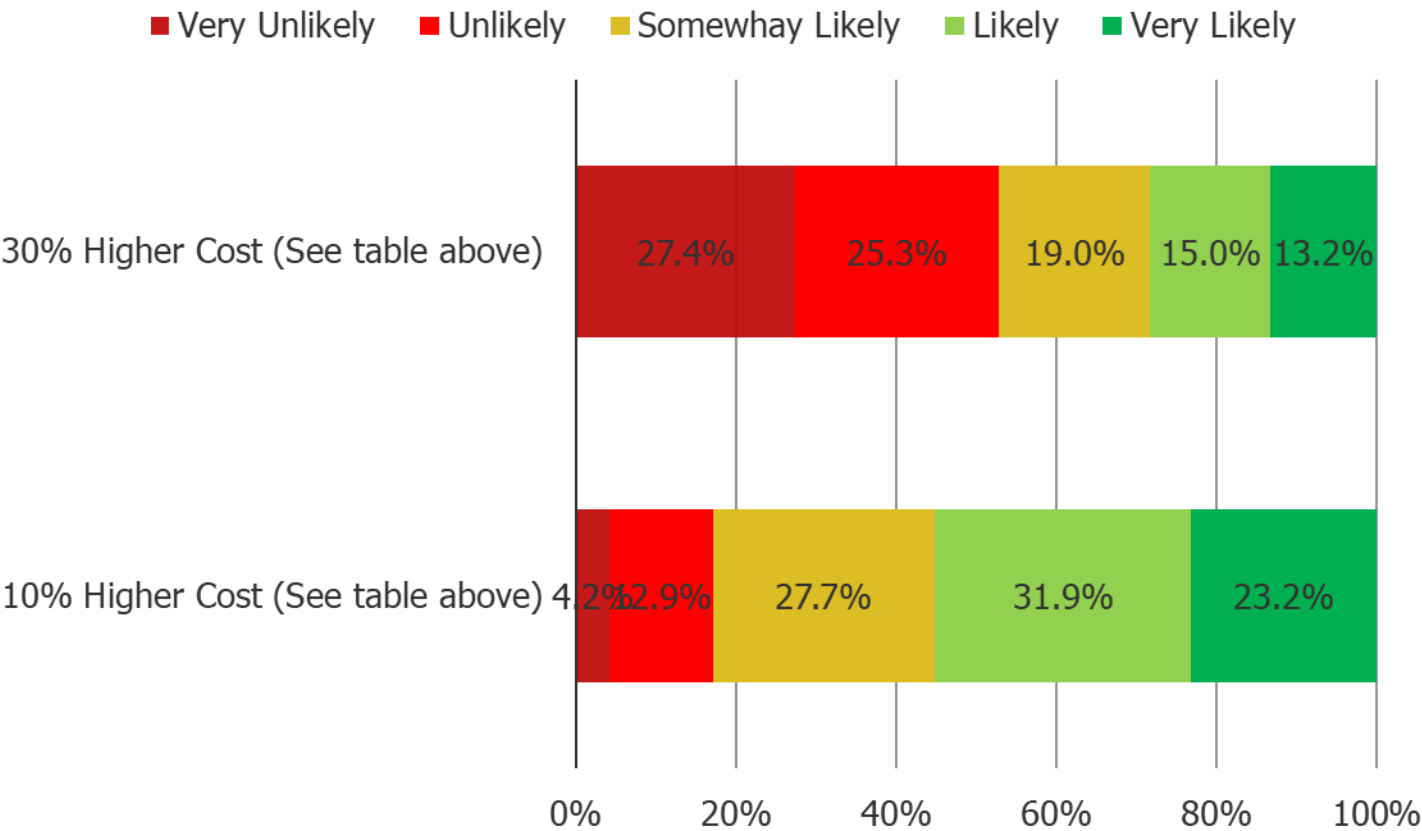
April 2025



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...

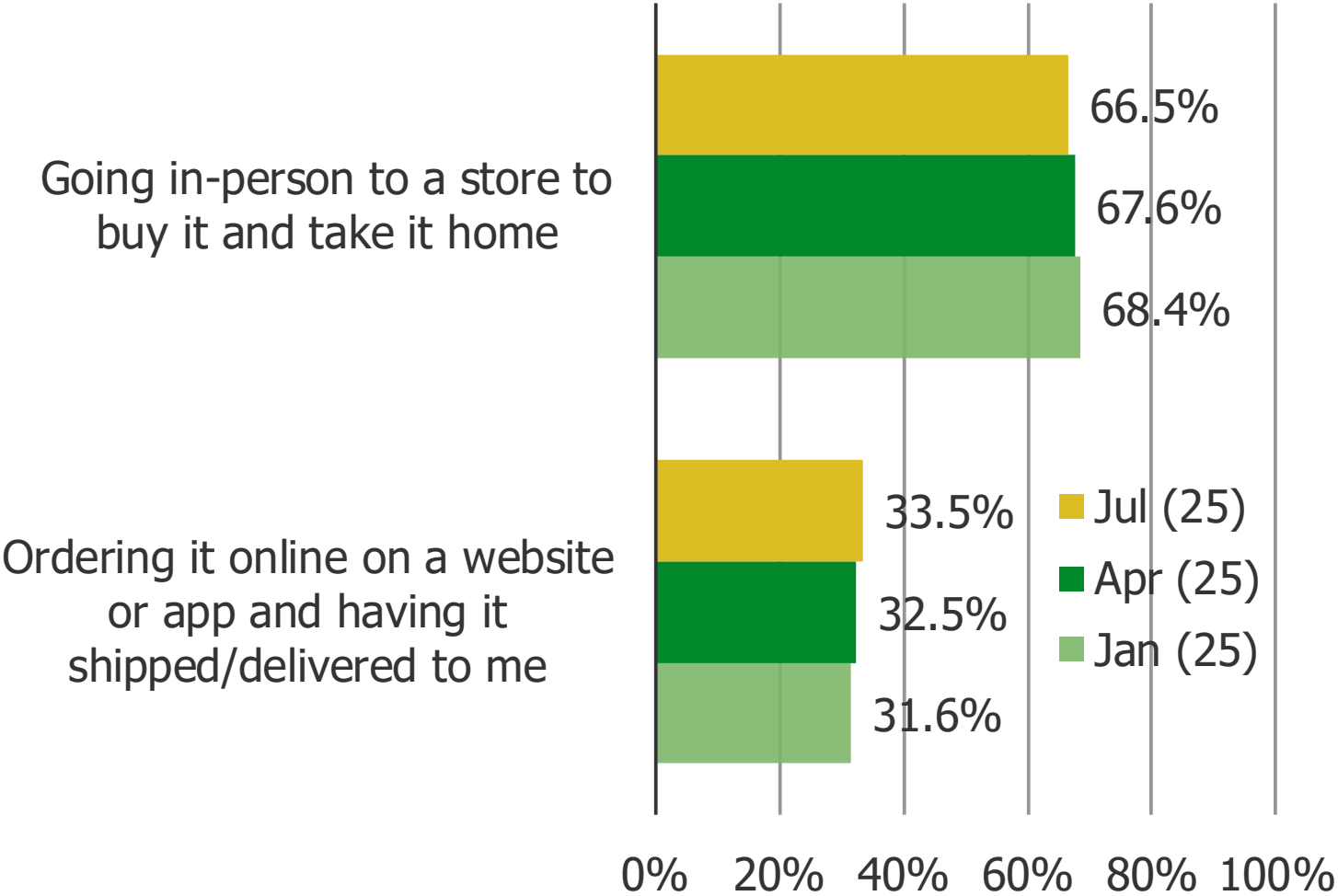
This question was posed to iPhone owners who said they would be likely or very likely to buy at the current price today (N = 379)... combining July and April waves to achieve larger N size.

Model	Current Price		10% Higher Cost		30% Higher Cost	
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iPhone 16 Pro Max	\$ 1,199.00	\$ 49.95	\$ 1,318.90	\$ 54.95	\$ 1,558.70	\$ 64.94



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?**

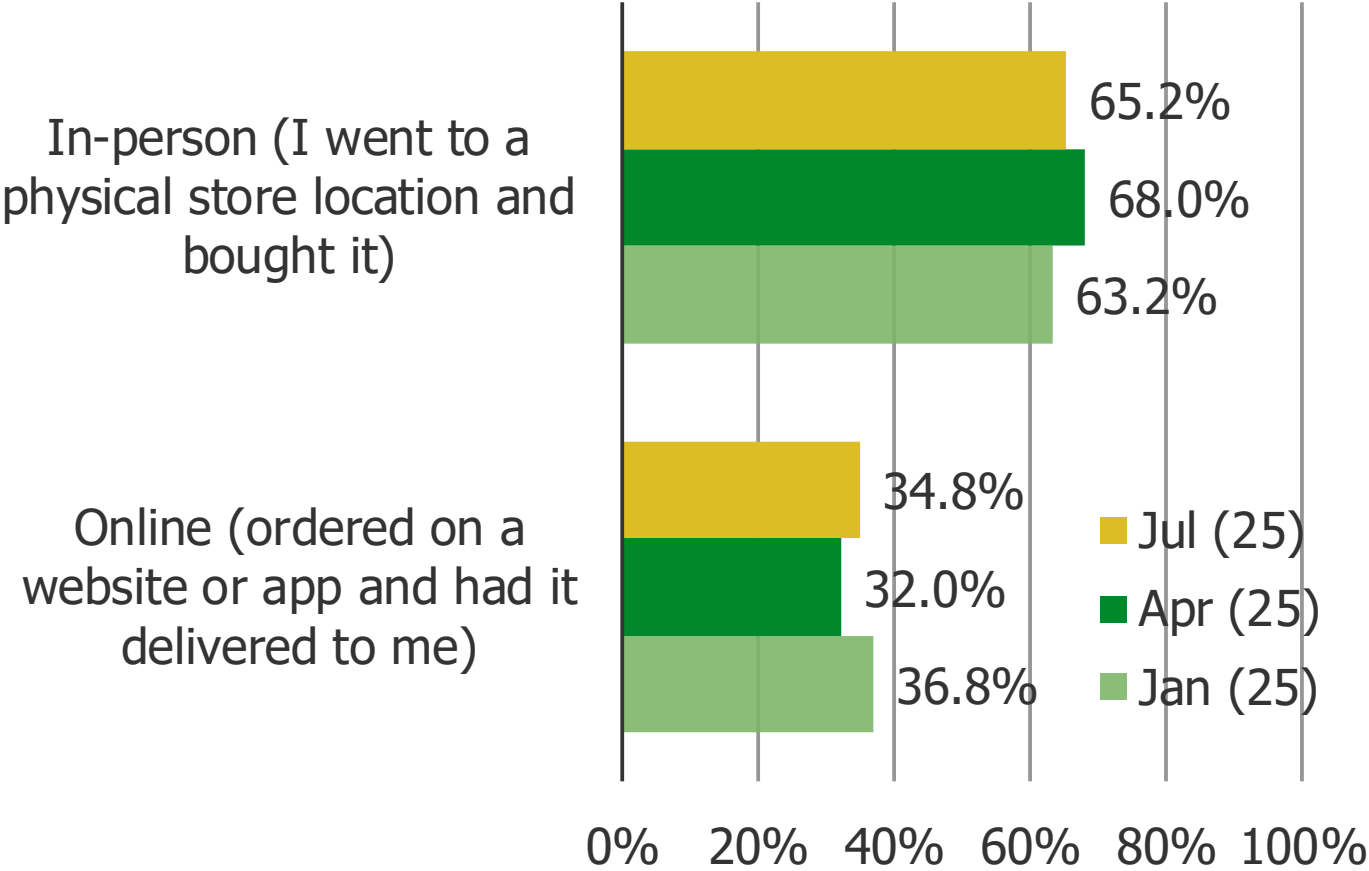
- Convenience
- More likelihood of getting specific color or storage size that in person may not offer
- Cause I'm lazy
- I feel like you can save more money that way
- I dislike the upsell you get when buying in person.
- Ease of comparison, and less worry of being out of stock
- Easier
- It's more convenient.
- Convenient
- I don't think it matters either way
- I trust online platforms
- Saves time
- Better price
- Convenience
- It takes too long in store
- It saves me time
- Easy to place order and less time consumption
- It's more convenient
- It's easier
- Because it's my preferred way of buying things.
- You do not have to leave home
- No need to stay on line at the store and better selection online
- Easy
- I like it
- No pressure from sales rep
- It's just easy
- Quicker and easier to do online
- Quicker and cheaper
- Less expensive, don't need handholding.
- Live in a rural area. Easier for me.
- Easier to compare different models and read reviews before buying
- I can research it better
- Easier
- Not as handled around in-store. Newer not on shelf.
- More convenient.
- Less hassle
- Better prices
- This works for me because I know I which type of phone I want.
- Because, it's faster and easier. The phone stores are way to busy for me.
- I hate going into stores.
- Convenience
- Convenient
- Much easier able to research everything online and do not have to stand in line and will deliver be delivered to my house
- Shopping online is more convenient
- More convenient
- Easier

**RESPONDENTS WHO PREFER IN-STORE – WHY?**

- Can see how phone feels in hand. don't want to buy something that wouldn't fit me and how I use it.
- I like to get my devices asap
- I want to see it
- The ability to try it out before buying.
- I feel like i need to see the product and just knowing that I am not buying a scam worthy product
- I chose to buy in-person because I want to check the phone's features directly and make sure it works properly before taking it home.
- I like seeing a product in person
- I prefer the interaction
- I need to interact with sales people
- Because I want to be able to see and feel the device that I am going to purchase and not just track it down.
- I would prefer to have my hands on it before I buy it just to get a feel for the phone.
- I like to see all the phones in person before choosing/purchasing one
- You can see the actual device that you are purchasing.
- see and hold and ask questions
- I like to see the product
- Because you get to see and try out your new device instead of hoping from online
- Great customer support
- To make sure I like it and so I don't have to wait
- I like to see the phone in person and hold it
- I like being able to talk to people about items and like having things right away versus waiting.
- I don't like waiting
- I like it
- Because you can actually hold it and see how it works
- I want to see it in person and use it
- I get to see it before I buy it
- I like to see exactly what I'm buying and leave with it the same day.
- I want to try it in person first.
- I want to be sure I am understanding my purchase
- I can have it when I want it
- Prefer in person
- Cause you can see it in person
- I like the Apple Store.
- I'd rather see it
- To make sure it arrives home with me safely.
- Just feel more secure and I like having assistance.
- Hold it beforehand
- Easier to view and test the product right then and there.
- Don't like to wait
- Buying online is sometimes very risky.
- So you can test drive it.
- Personal interaction with person to answer questions
- I like the in person advice and information
- Because I like to see and feel what I'm buying.
- To see what you're getting
- I have to see it physically.
- Have it faster. Able to use it right away
- Because I know it won't arrive defective.

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

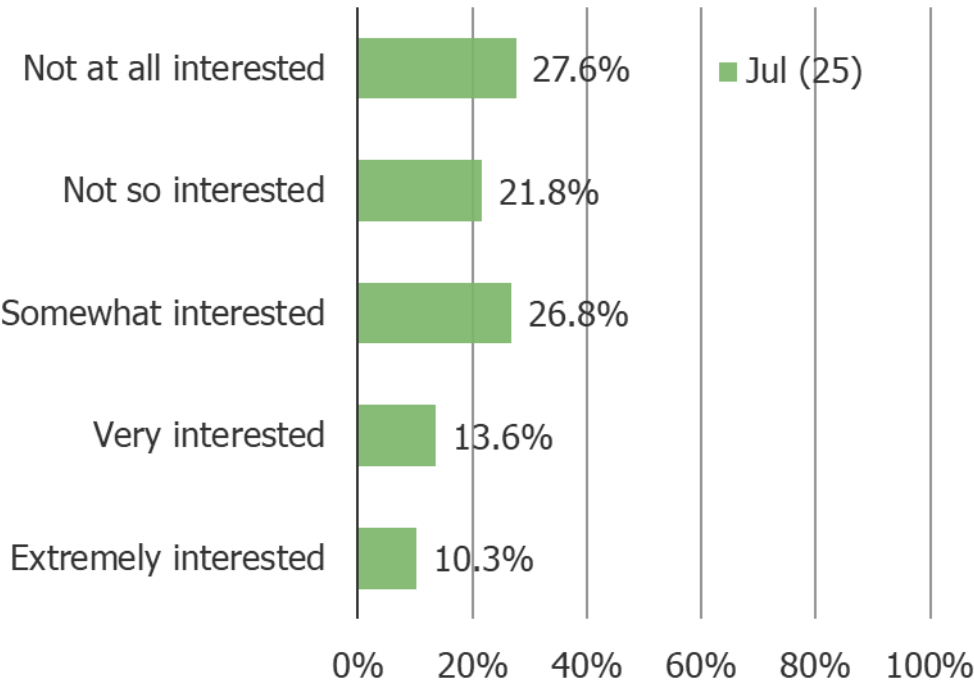
This question was posed to all respondents.





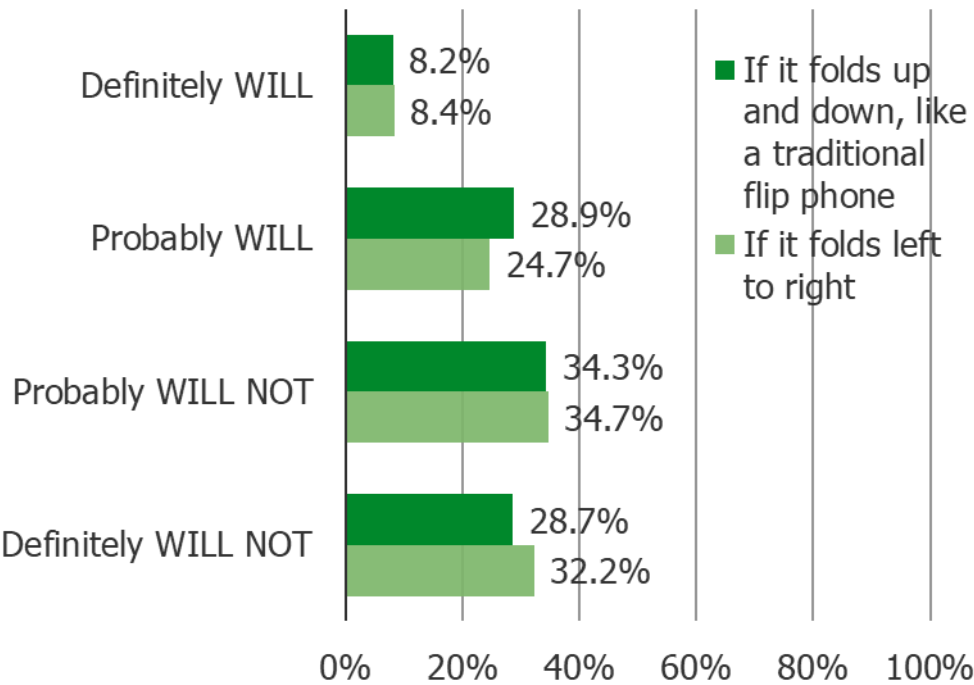
HOW MUCH INTEREST WOULD YOU HAVE IN A FOLDABLE IPHONE? (ONE THAT FOLDS LIKE A TRADITIONAL FLIP PHONE TO A SMALLER FORM FACTOR, BUT THEN FLIPS OPEN TO THE SIZE OF A NORMAL IPHONE OR LARGER).

This question was posed to current iOS users.



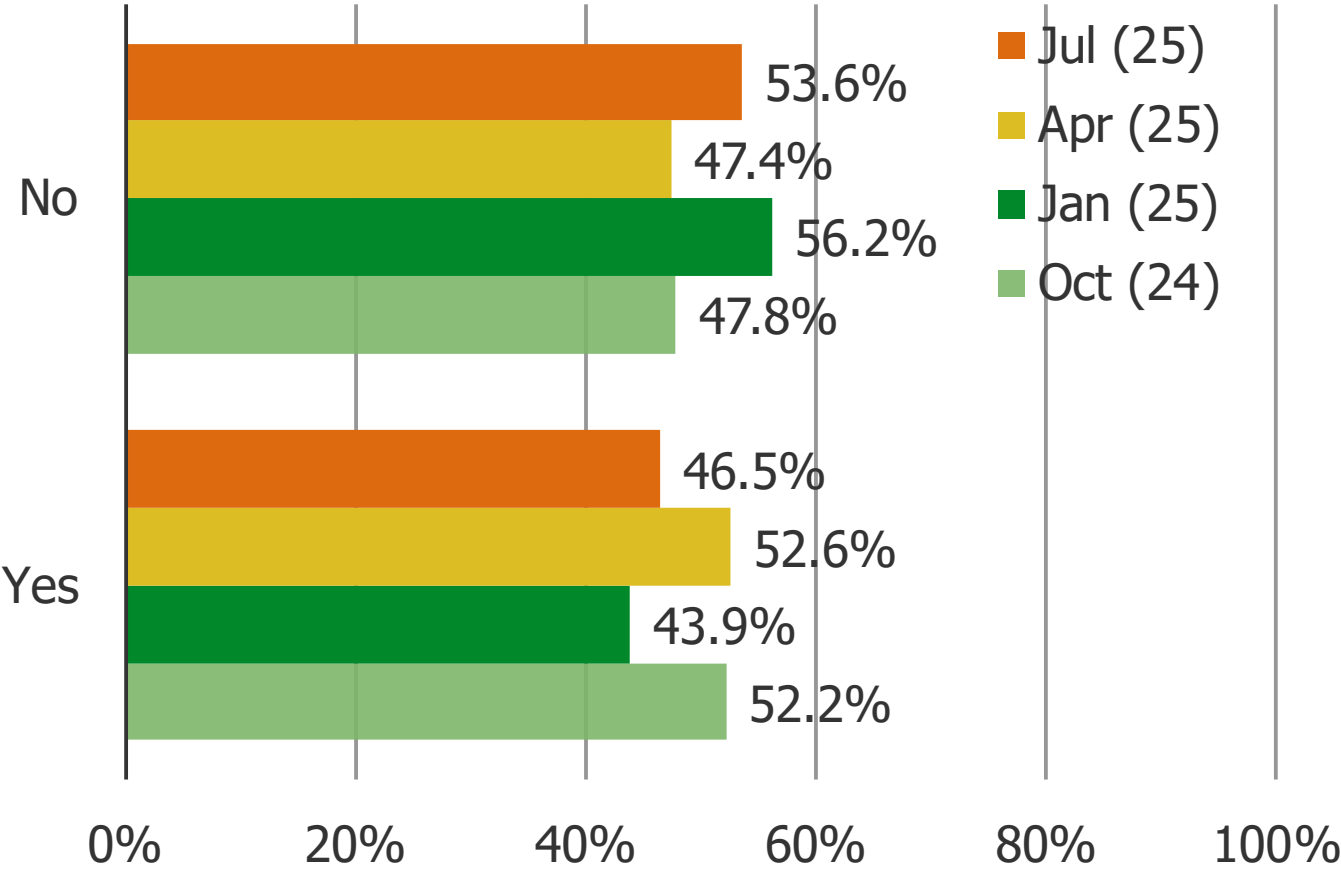
IF APPLE RELEASES A FOLDABLE IPHONE IN 2025 OR 2026, HOW LIKELY WOULD YOU BE TO GET IT?

This question was posed to current iOS users.



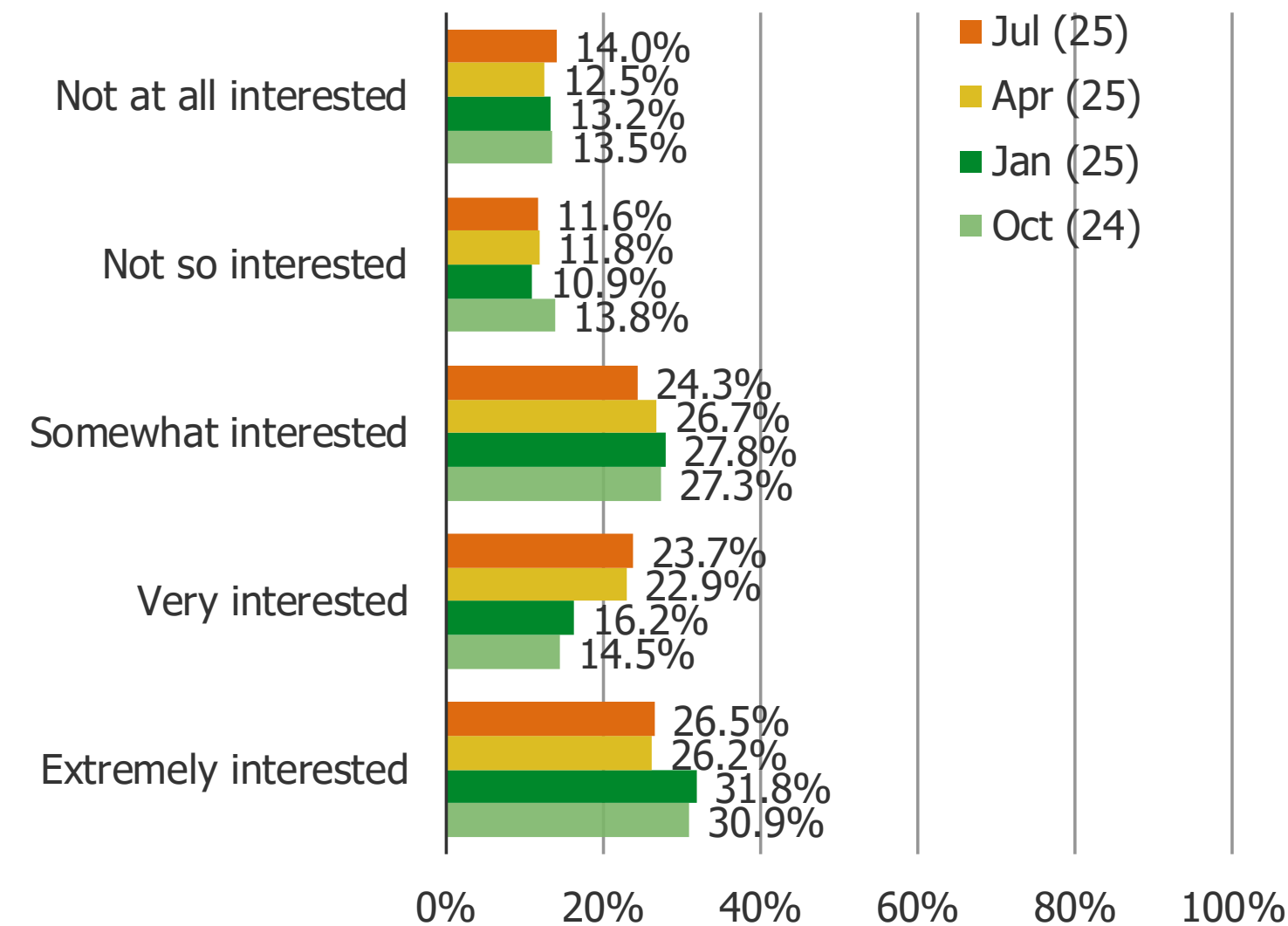
ARE YOU CURRENTLY CONSIDERING UPGRADING YOUR IPHONE TO A NEW/DIFFERENT MODEL THAN WHAT YOU HAVE NOW?

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



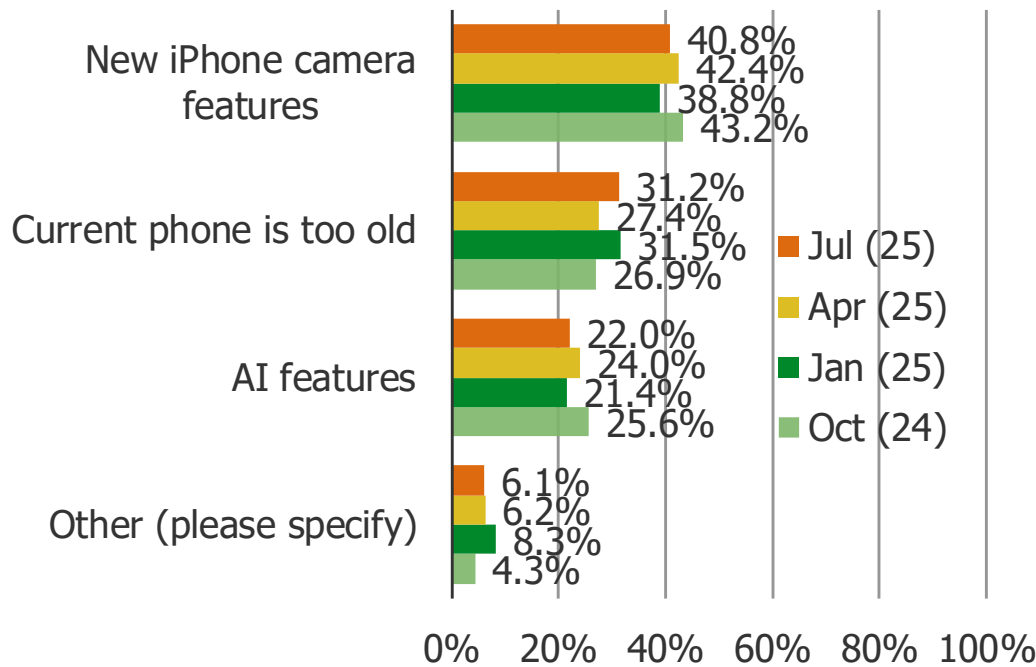
DO YOU HAVE ANY INTEREST IN THE LATEST IPHONES THAT WERE RELEASED? (IPHONE 16, IPHONE 16 PLUS, IPHONE 16 PRO, IPHONE 16 PRO MAX)

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

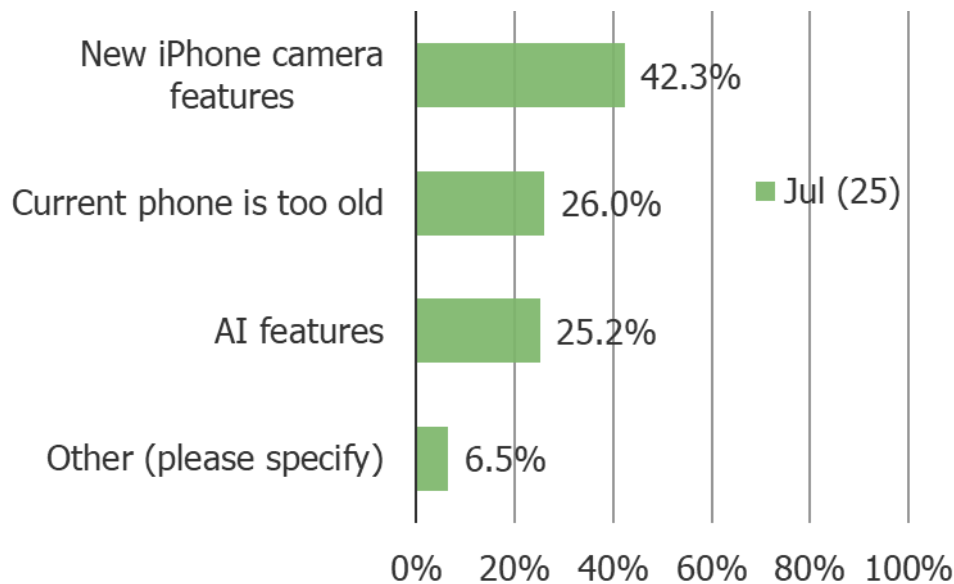


YOU MENTIONED THAT YOU ARE AT LEAST SOMEWHAT INTERESTED IN ONE OF THE NEWEST IPHONES JUST RELEASED. WHAT MAKES YOU MOST INTERESTED IN THE NEW PHONE(S)?

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

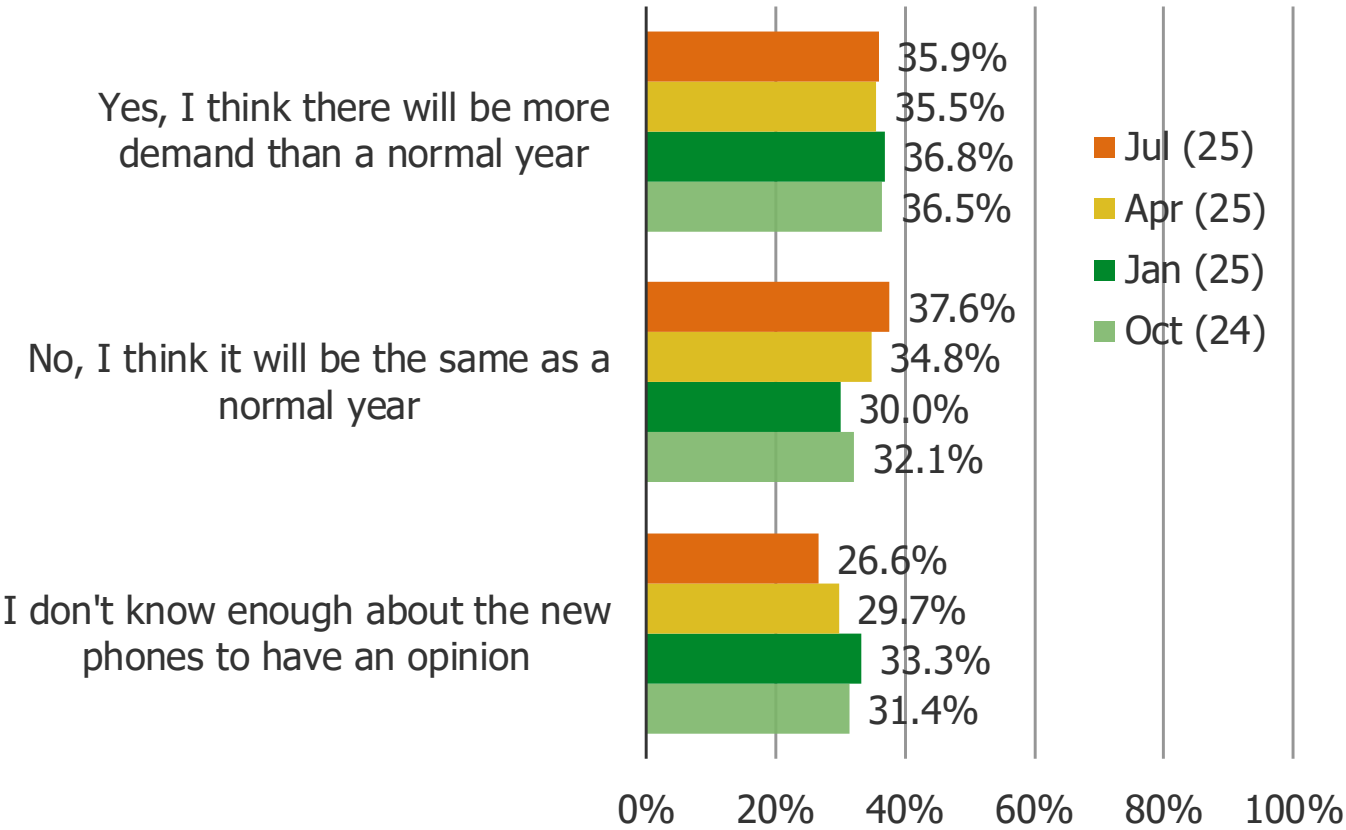


Focusing on iOS users who said they are extremely interested in one of the newest iPhones.



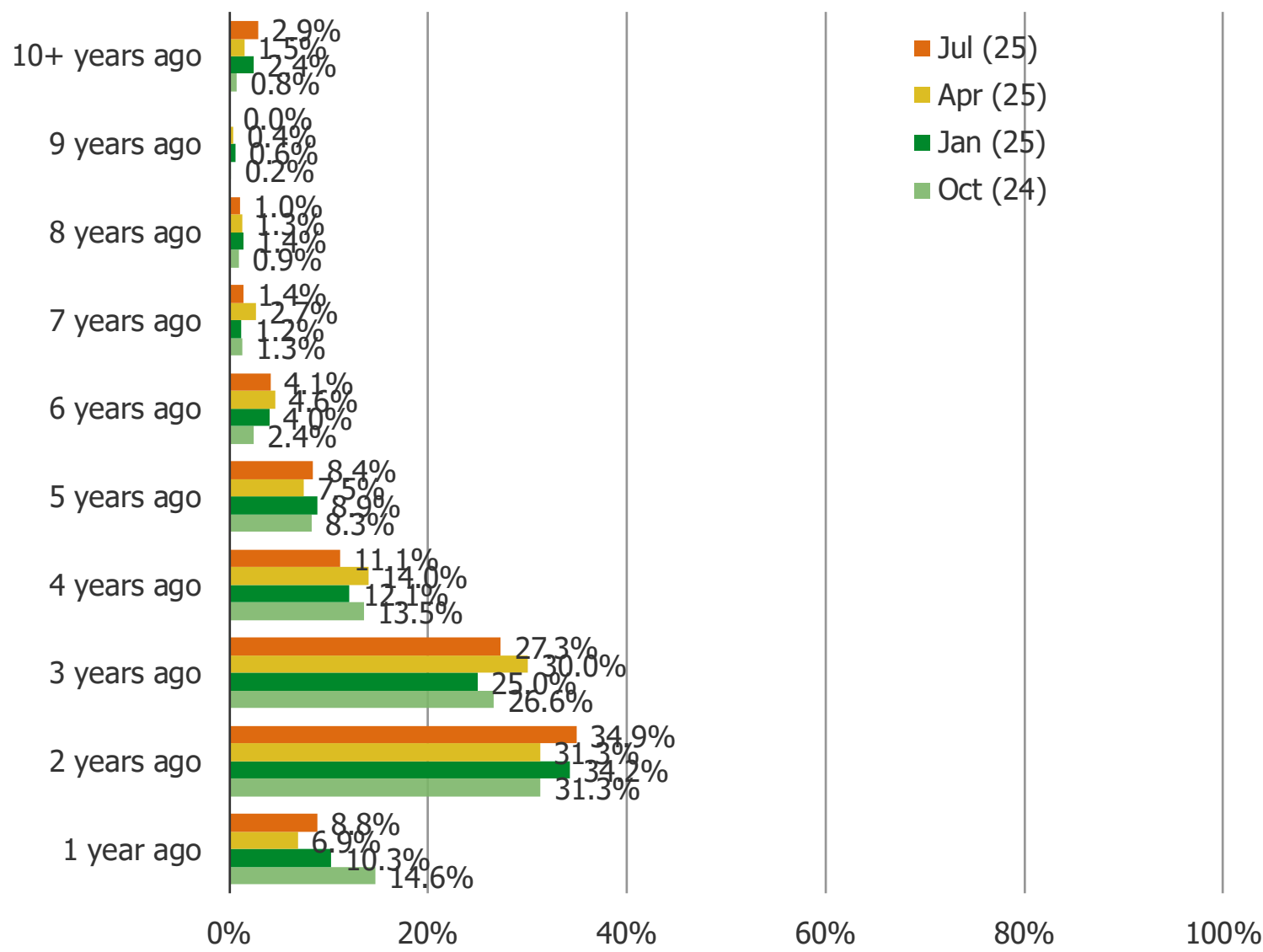
IN YOUR VIEW, DO YOU THINK THE NEWEST IPHONES (IPHONE 16, IPHONE 16 PLUS, IPHONE 16 PRO, IPHONE 16 PRO MAX) HAVE CHARACTERISTICS OR FEATURES ABOUT THEM THAT WILL CAUSE MORE IPHONE OWNERS TO UPGRADE COMPARED TO A TYPICAL YEAR WHEN NEW IPHONES ARE RELEASED?

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



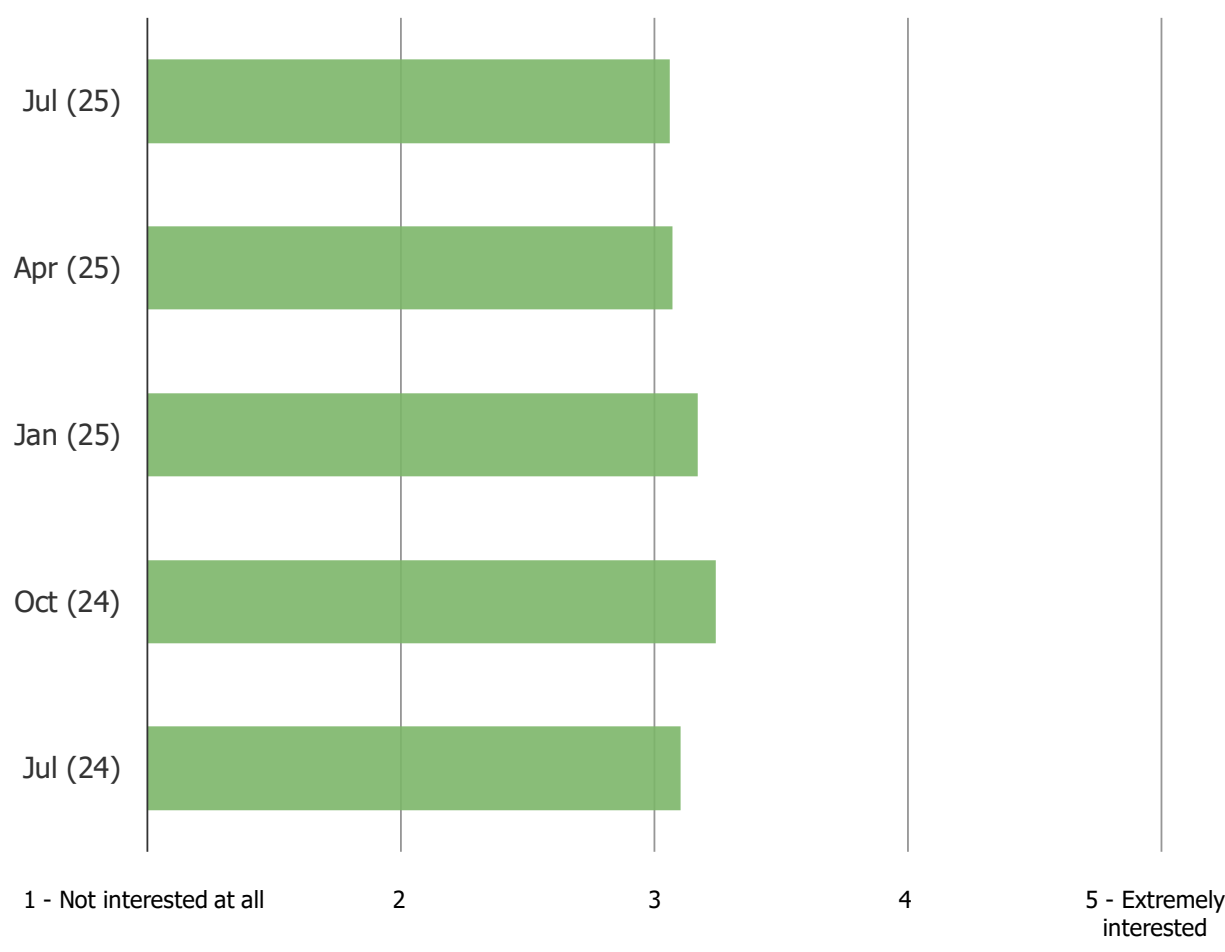
YOU MENTIONED THAT YOU GOT YOUR SMARTPHONE MORE THAN A YEAR AGO. HOW MANY YEARS AGO DID YOU GET YOUR CURRENT SMARTPHONE?

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?**

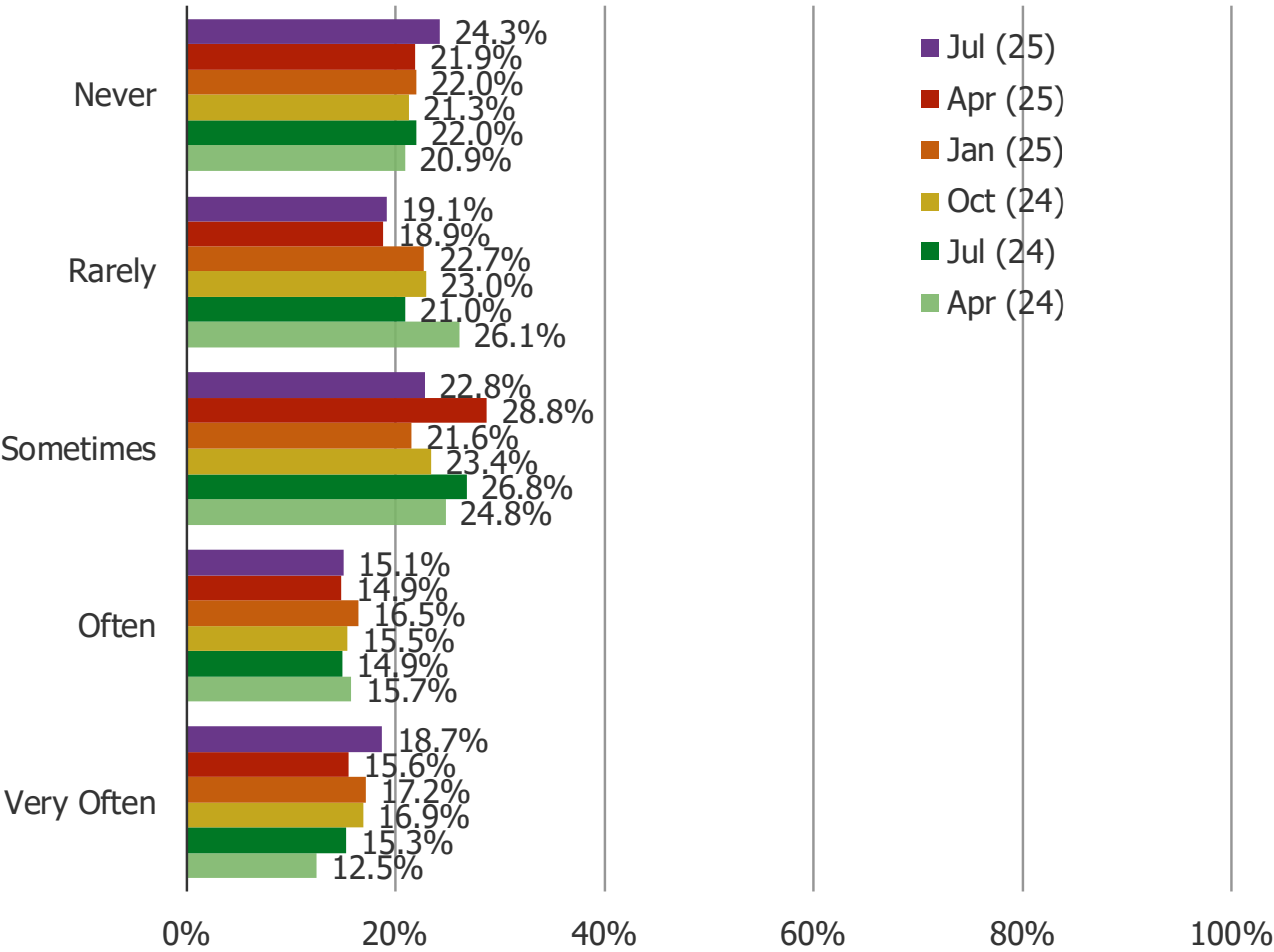
This question was posed to all respondents who are iOS users.





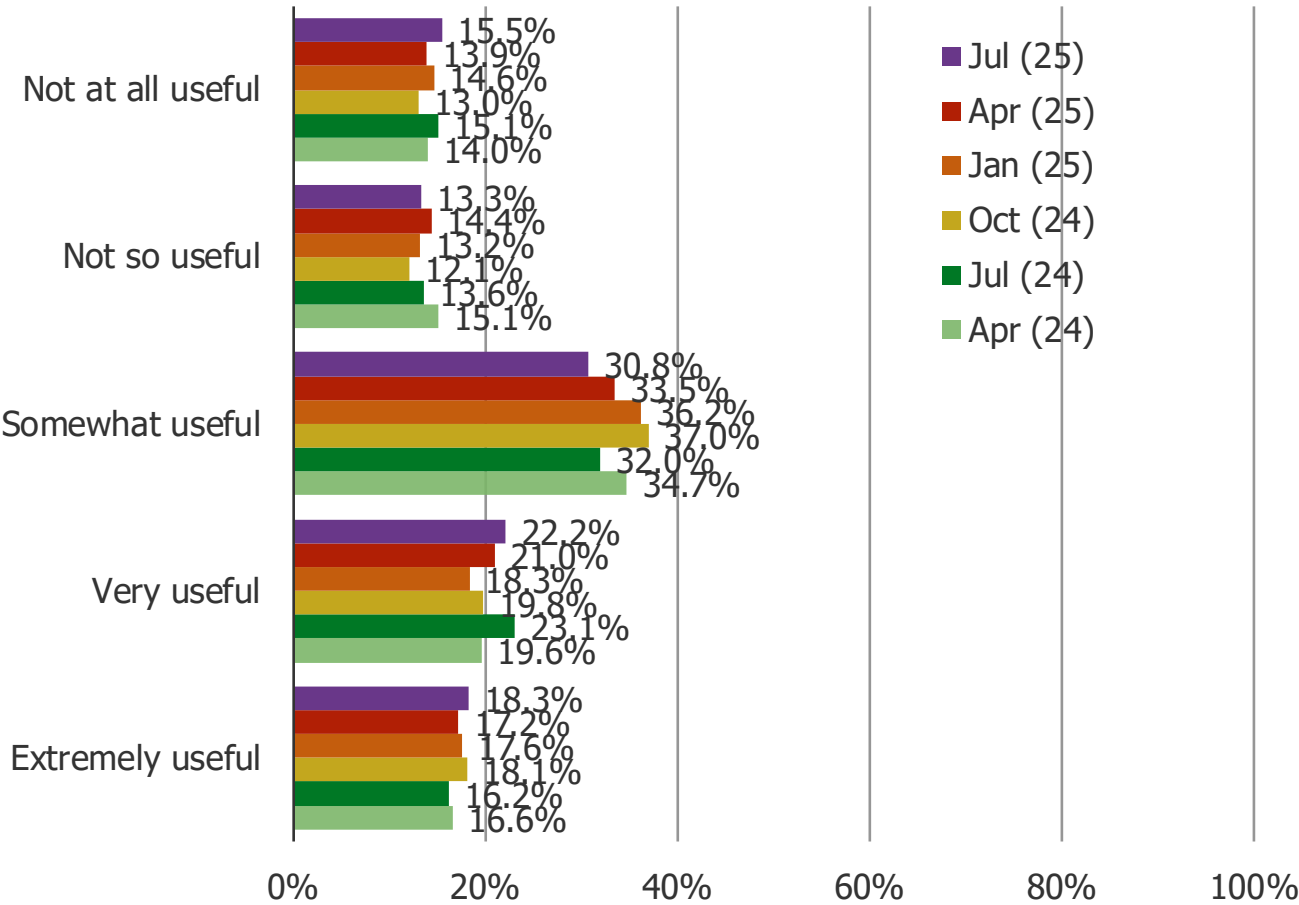
HOW OFTEN DO YOU USE SIRI ON YOUR IPHONE NOW?

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



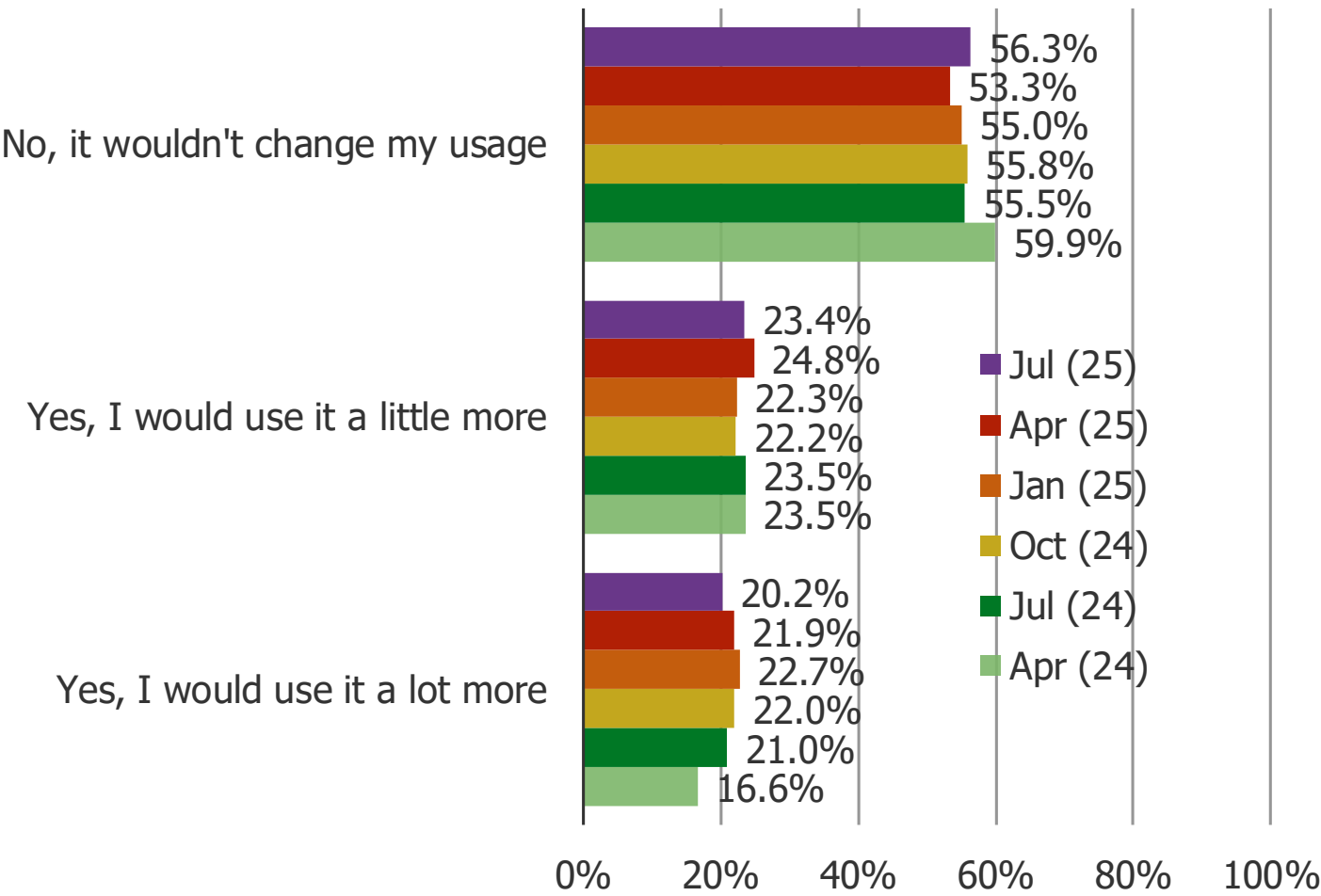
HOW USEFUL DO YOU FIND SIRI TO BE?

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



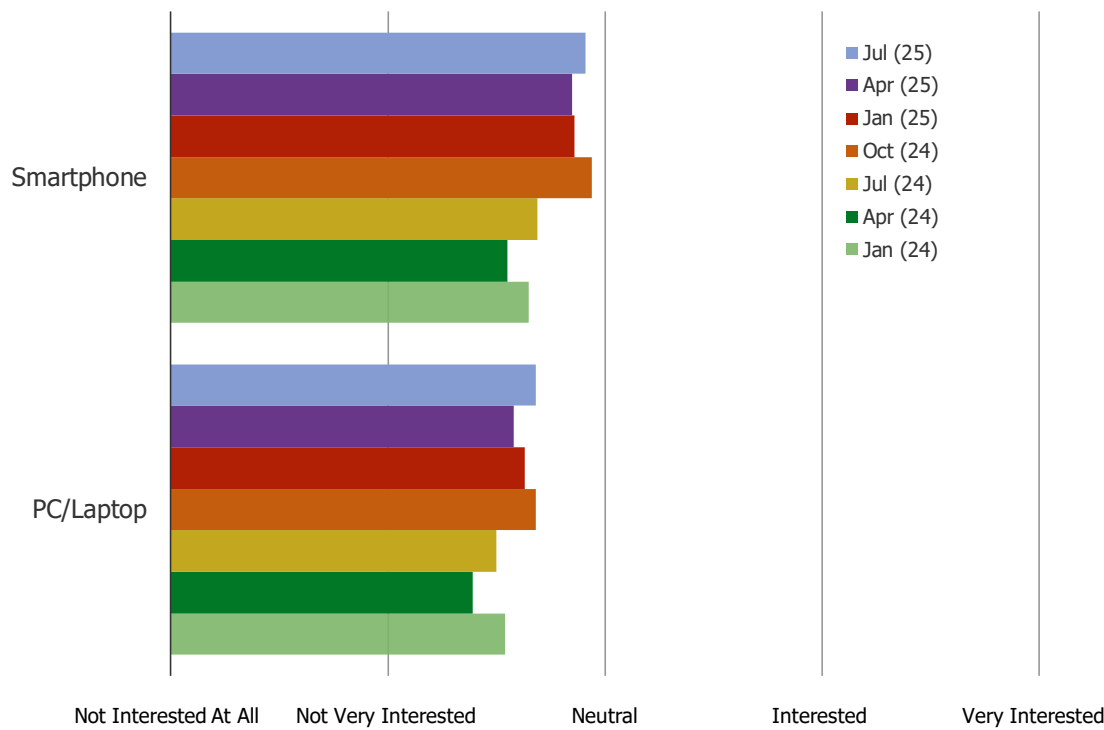
WOULD YOU CHANGE YOUR USAGE OF SIRI IF SIRI WAS ENHANCED BY AI (ARTIFICIAL INTELLIGENCE)

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

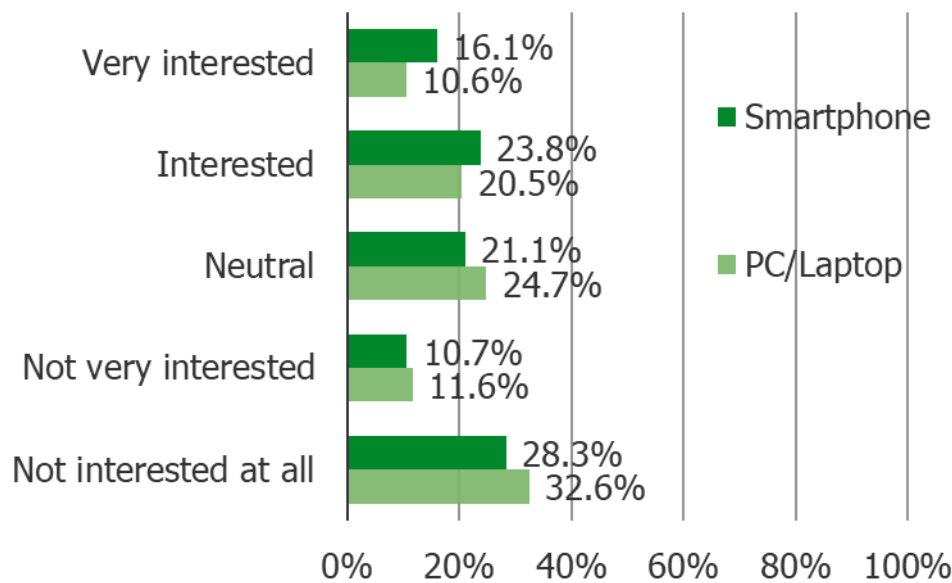


HOW INTERESTED ARE YOU IN USING AI (ARTIFICIAL INTELLIGENCE) CHATBOTS AND APPS, LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, ETC) WHILE USING THE FOLLOWING DEVICES...

This question was posed to all respondents.



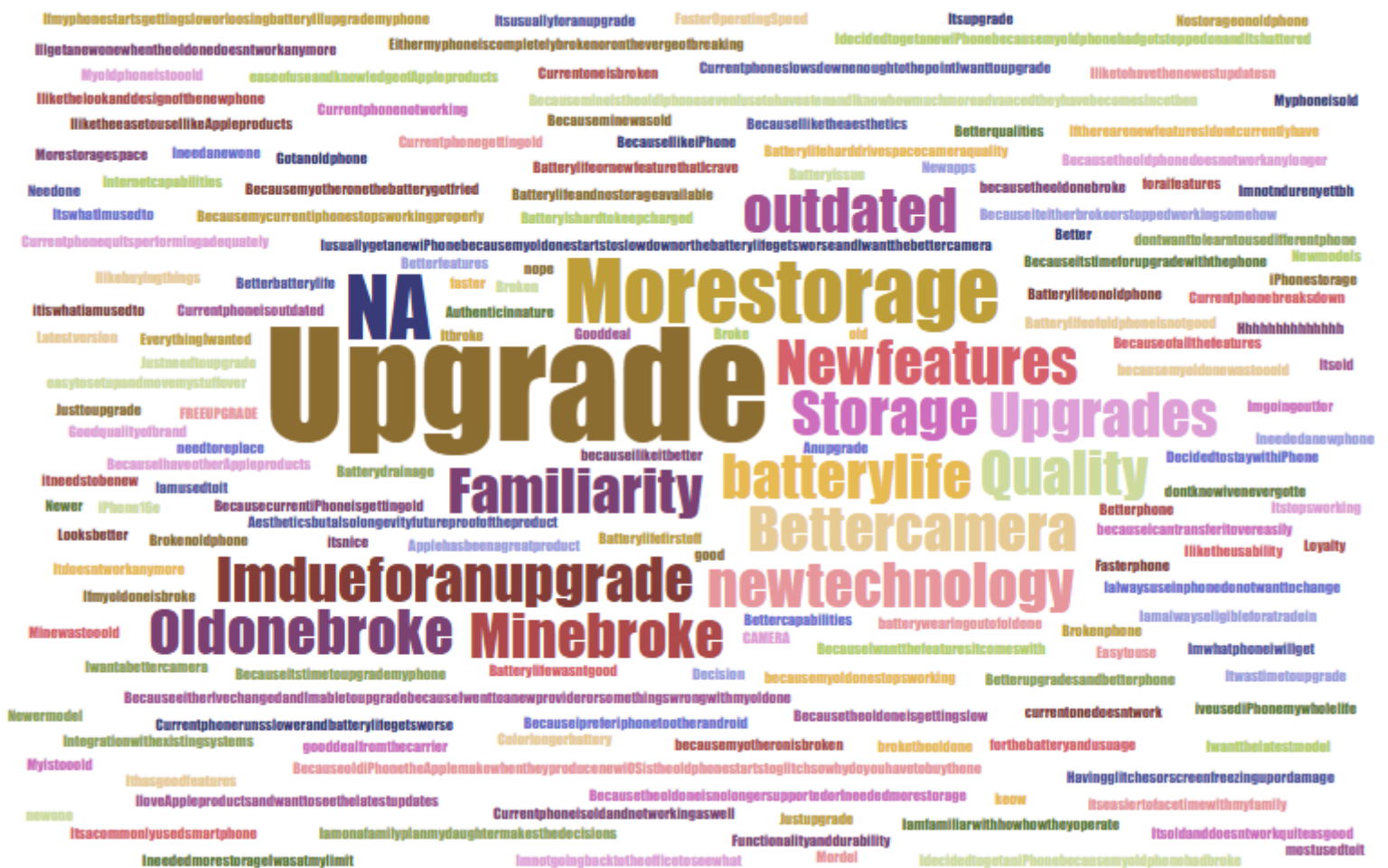
July 2025 Data Breakout



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

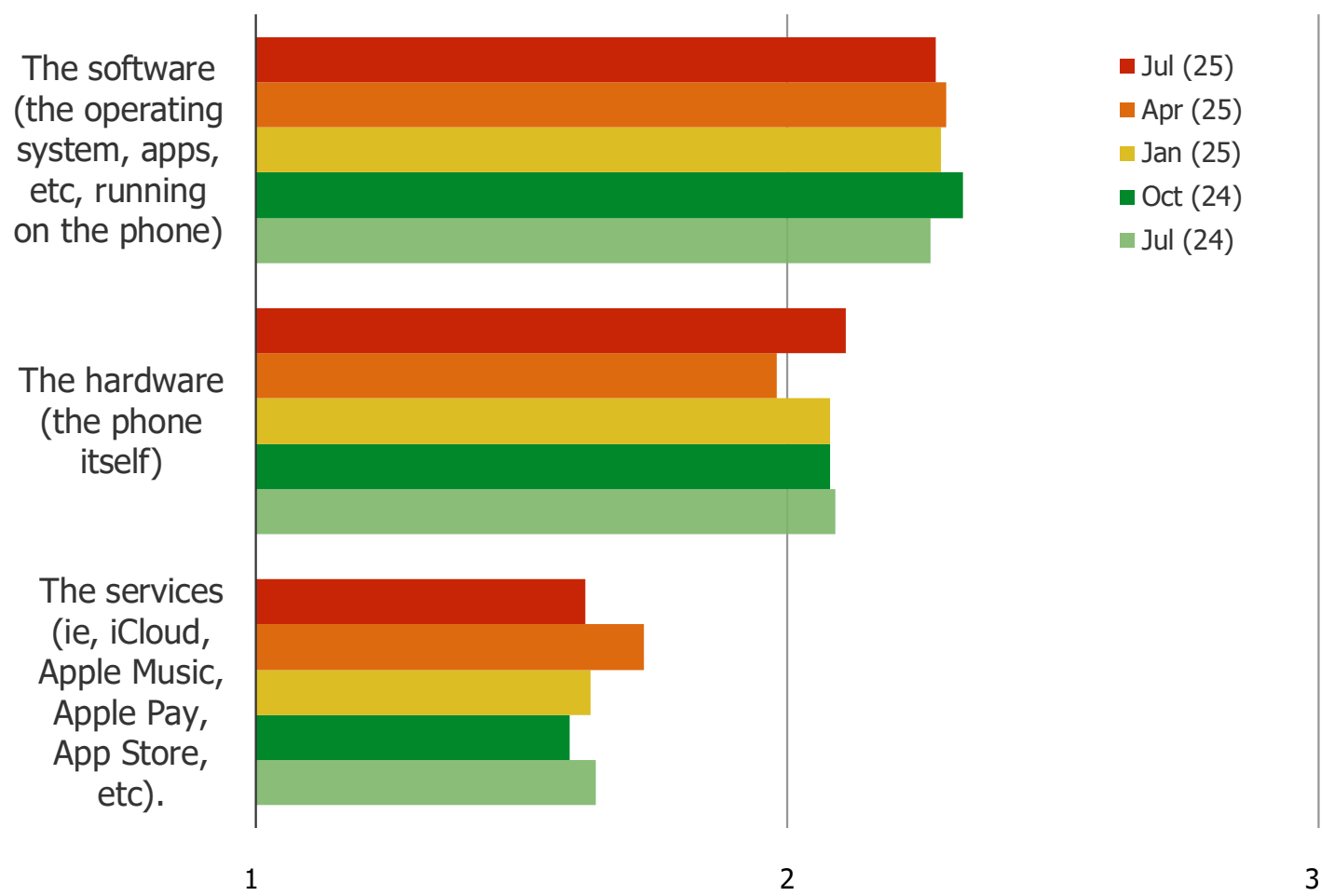


This question was posed to all respondents who are iOS users.



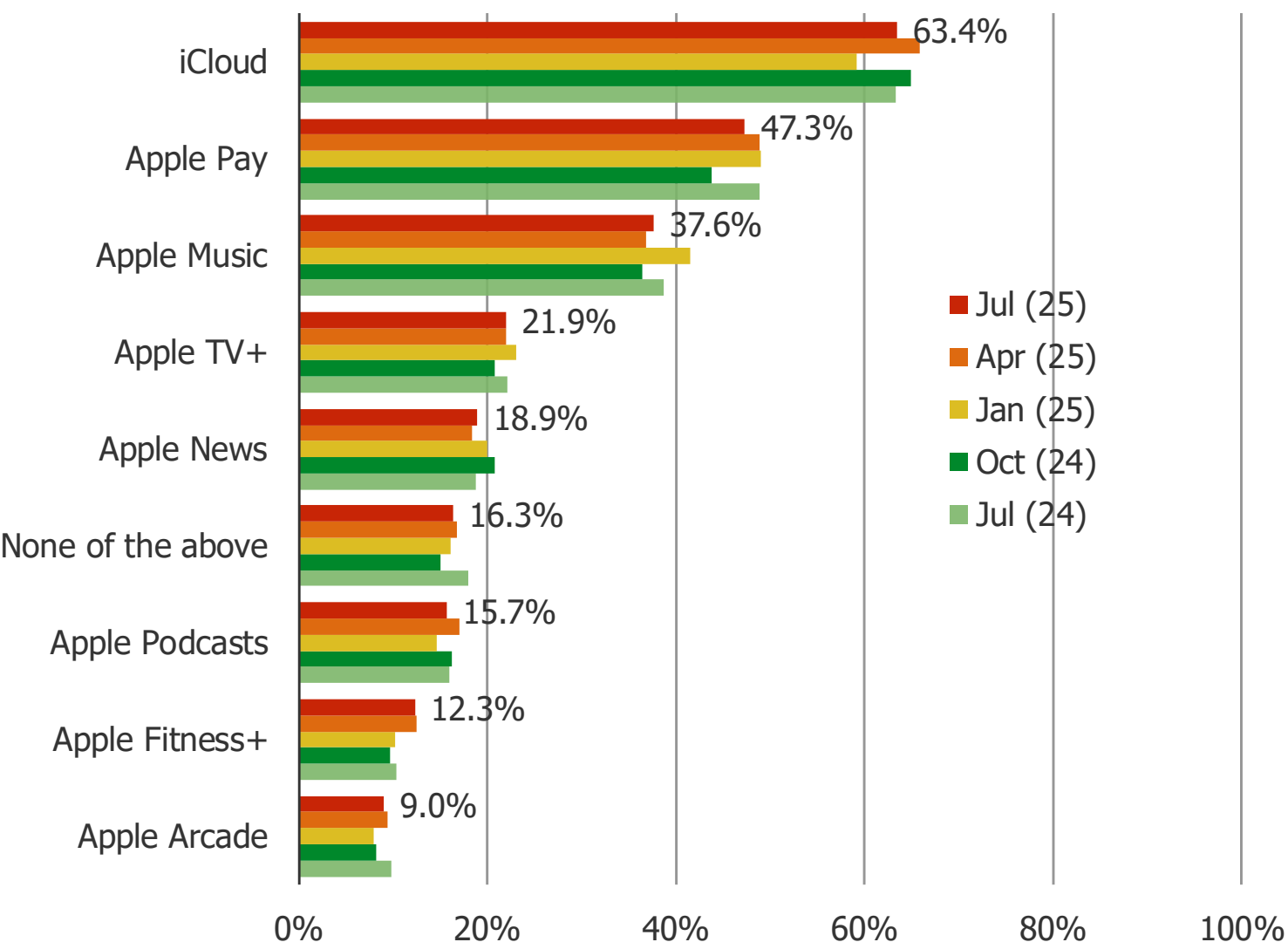
PLEASE RANK FOLLOWING IN IMPORTANCE OF WHAT DRAWS YOU TO THE APPLE ECOSYSTEM, WITH THE MOST IMPORTANT AT THE TOP?

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



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

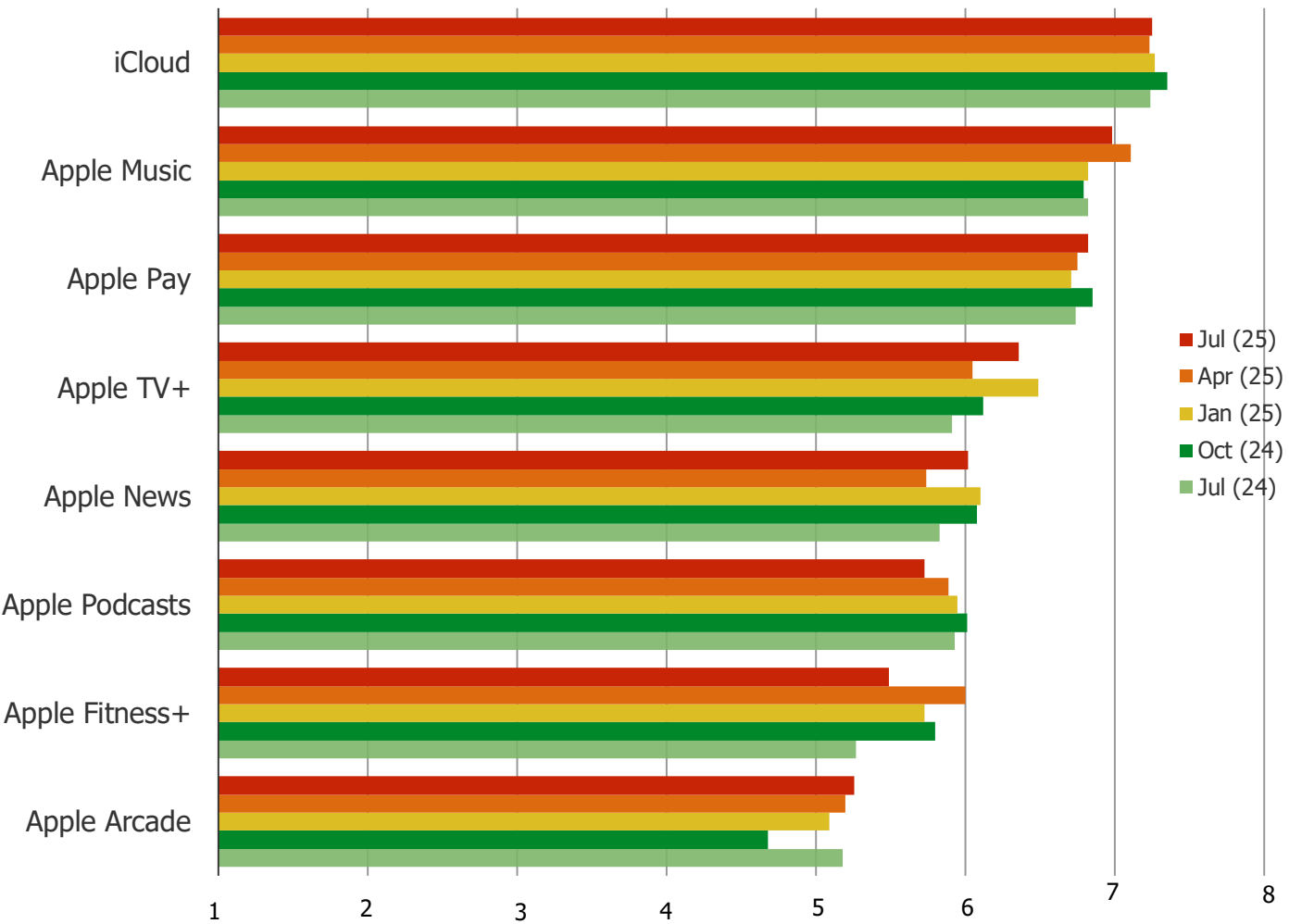
This question was posed to all respondents who are iOS users.





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.

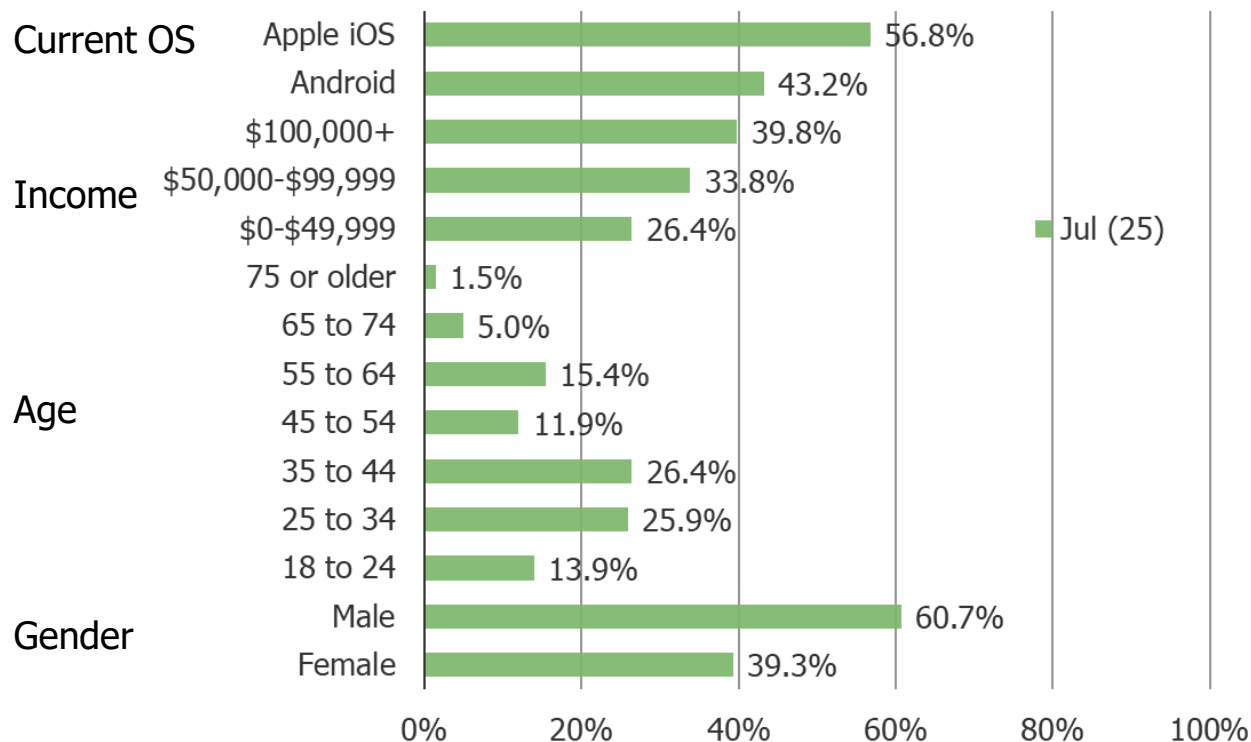
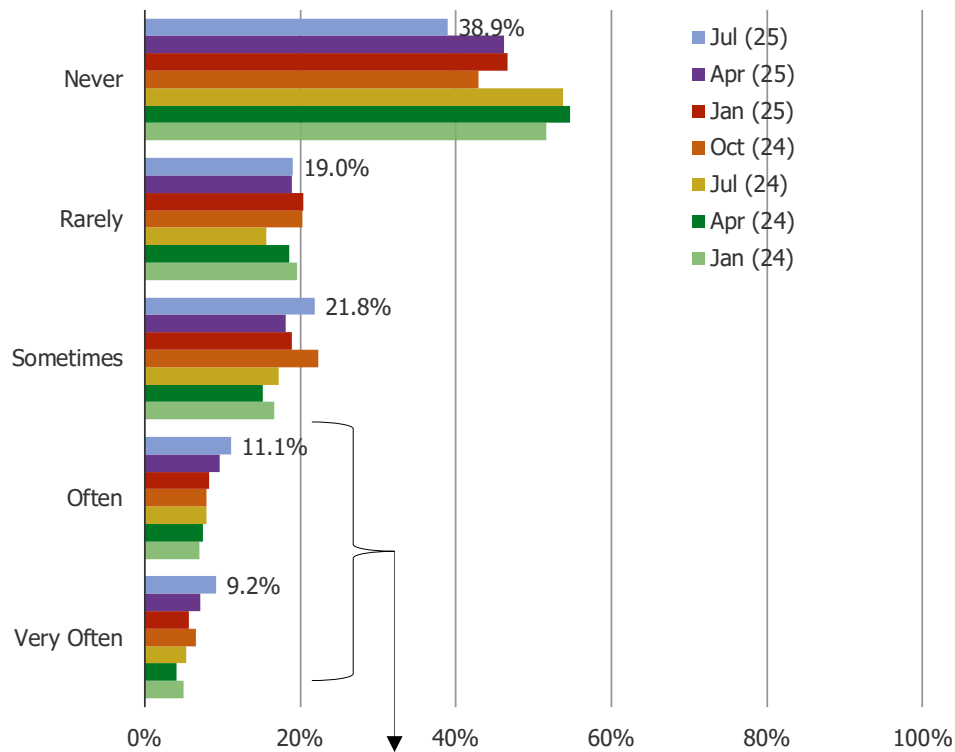


# AI CHATBOTS

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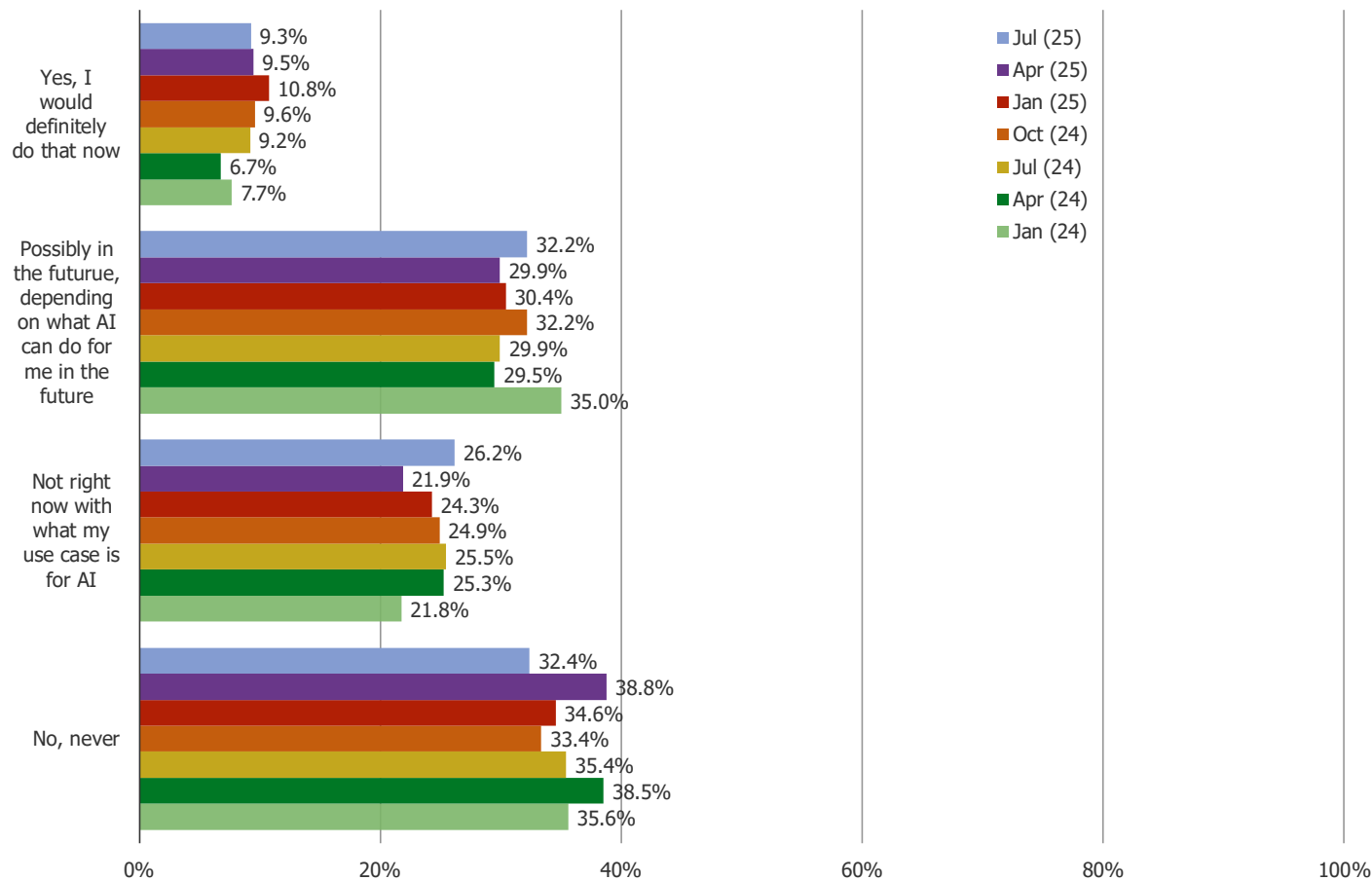
HOW OFTEN DO YOU USE AI CHATBOTS LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, OR OTHERS IN YOUR LIFE?

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?

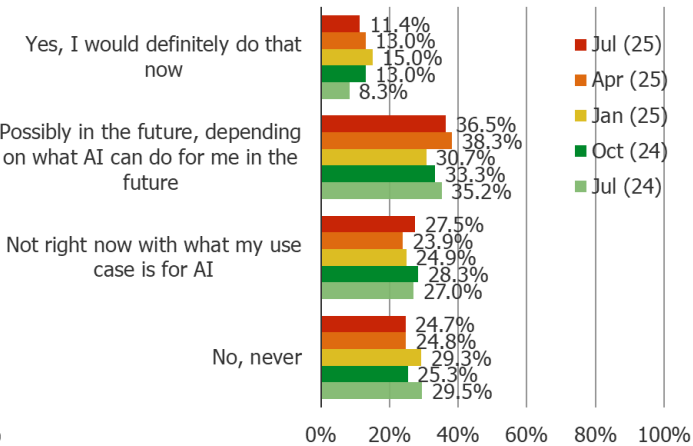
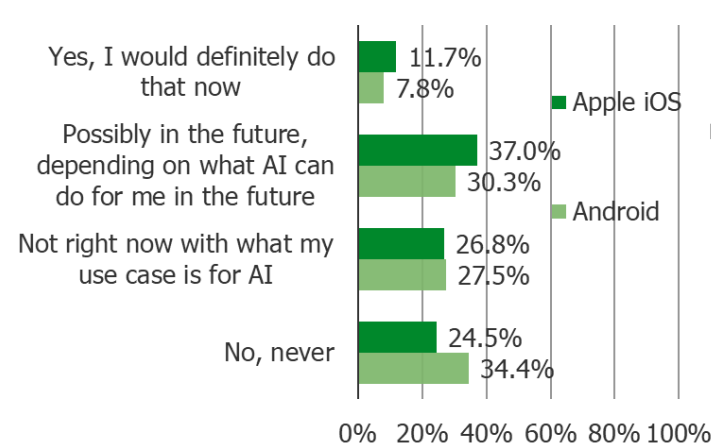
This question was posed to all respondents.



Cross-Tabbing The Above Data:

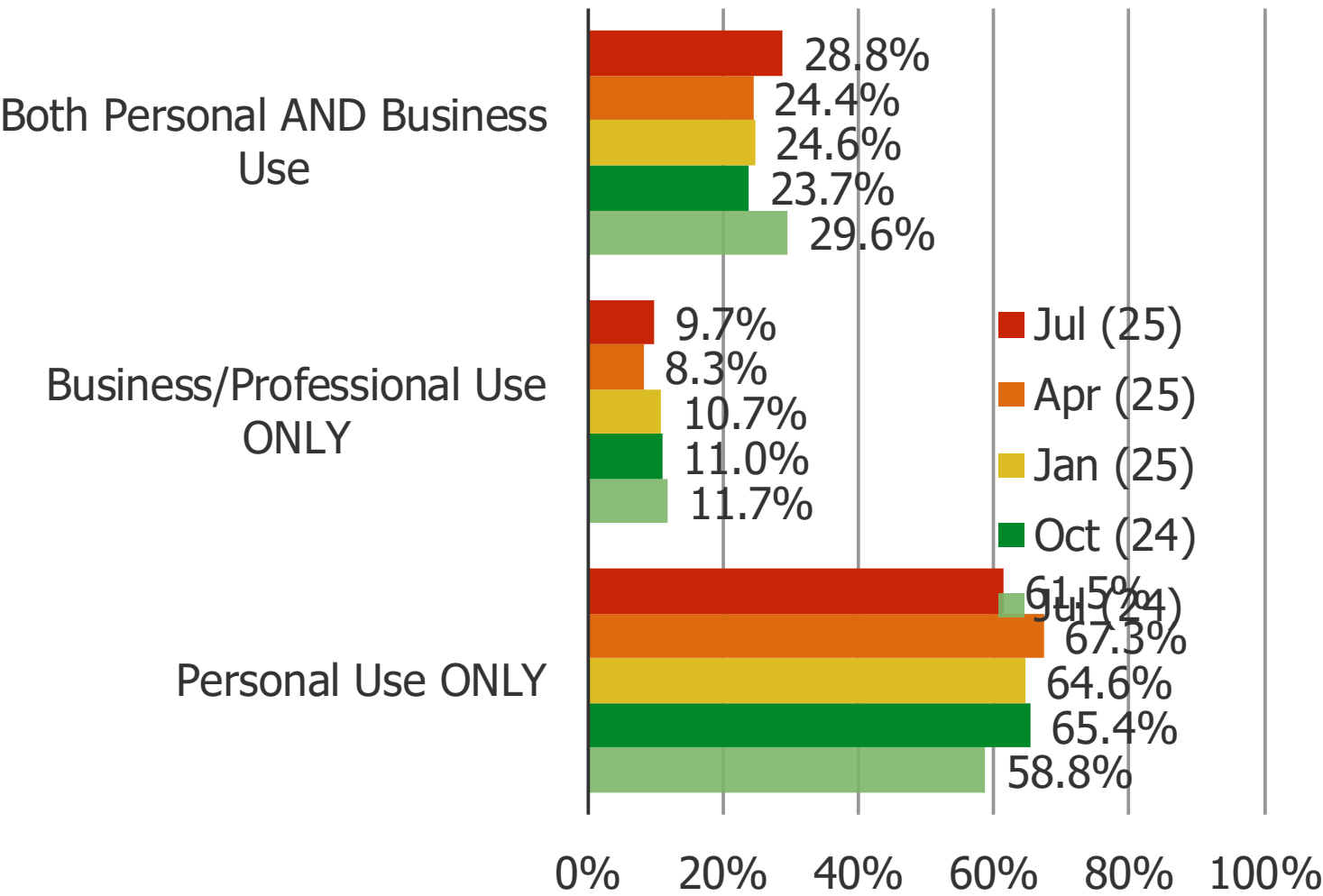
Apple vs. Android Users (July 25 Data)

iOS Users (Time Series)



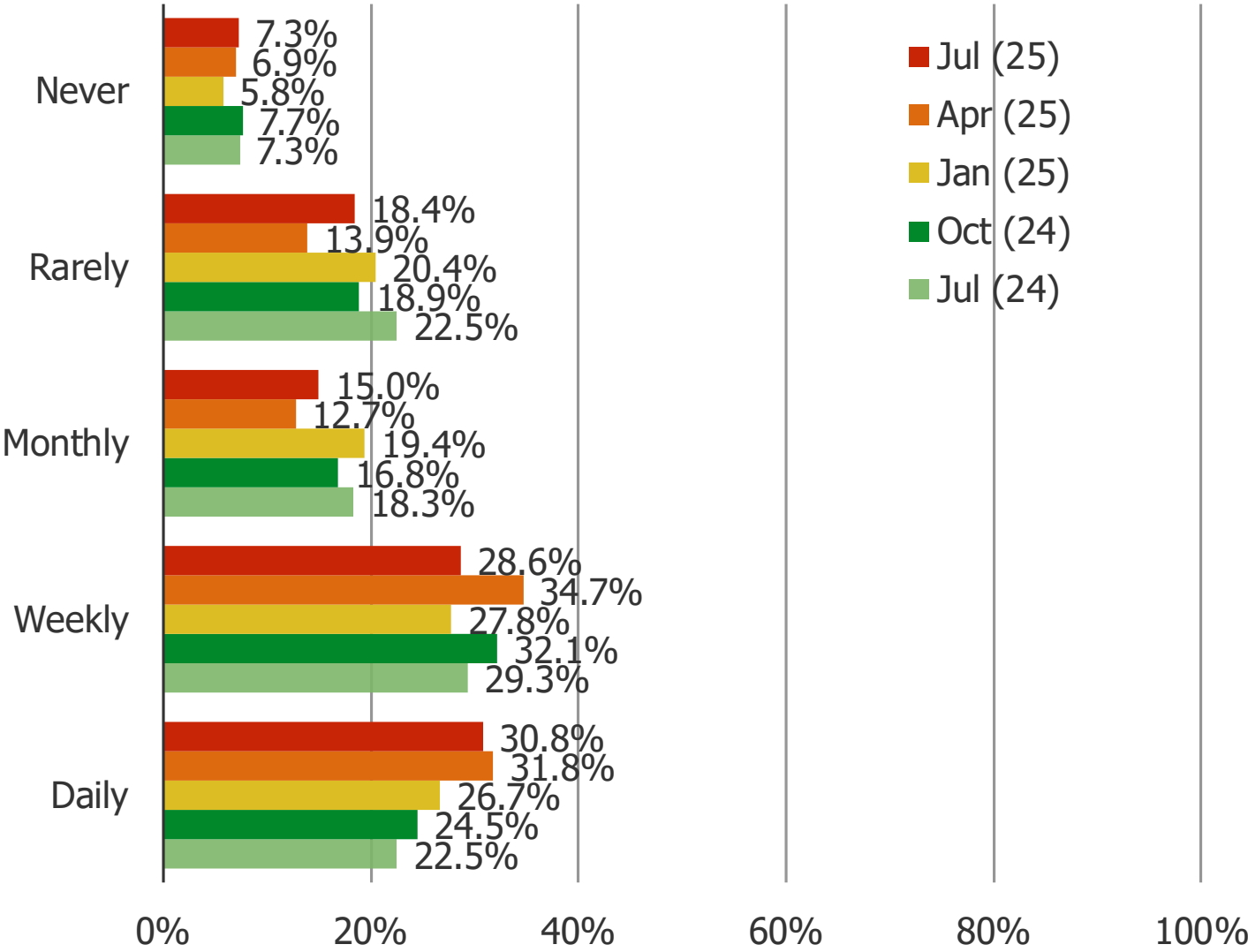
WHAT DO YOU USE AI CHATBOTS (LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, ETC) FOR?

This question was posed to respondents who use AI chatbots more than never (N = 608)



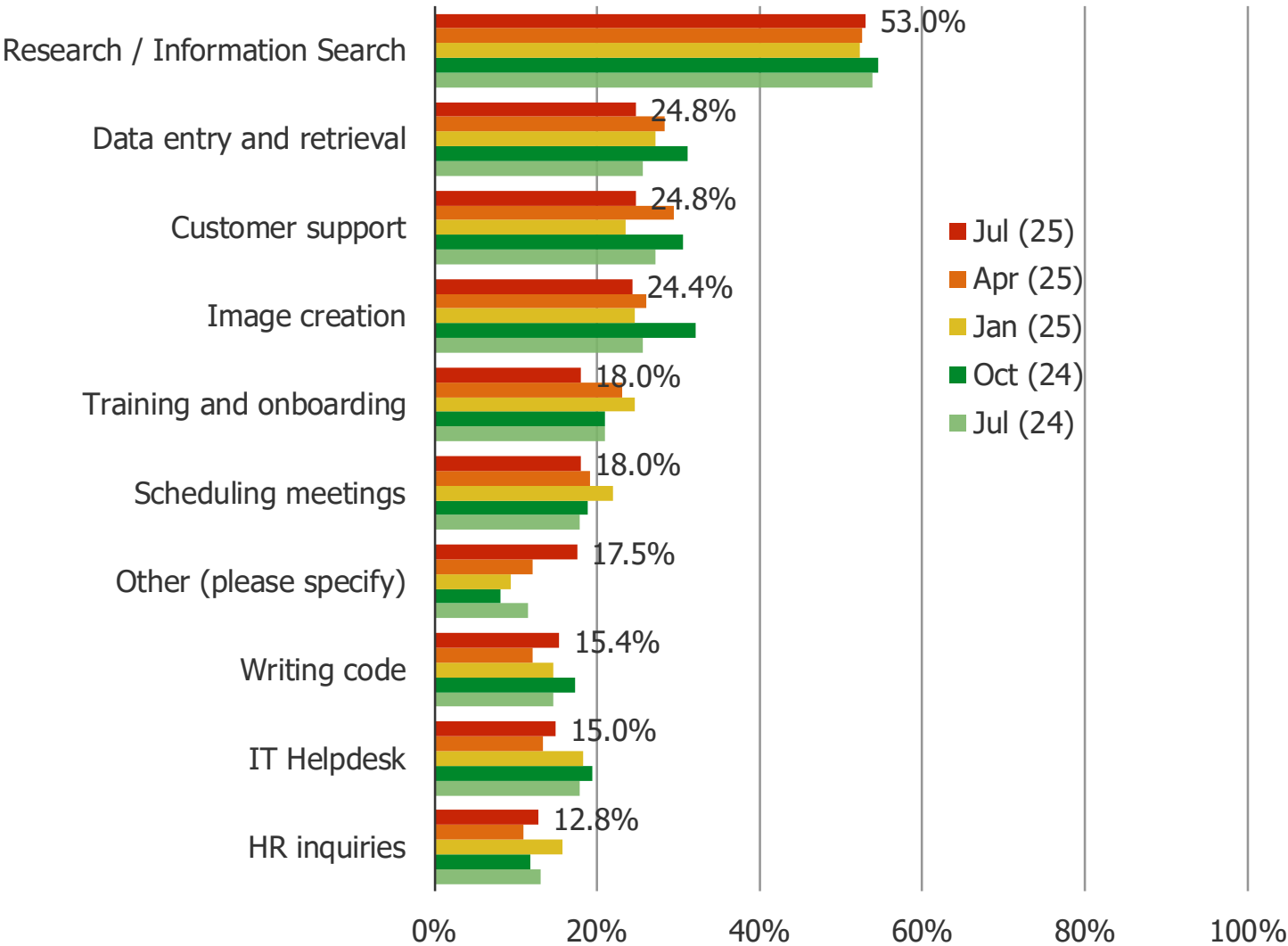
HOW FREQUENTLY DO YOU USE AI CHATBOTS AT WORK?

This question was posed to all respondents who use AI chatbots for work (N = 234)



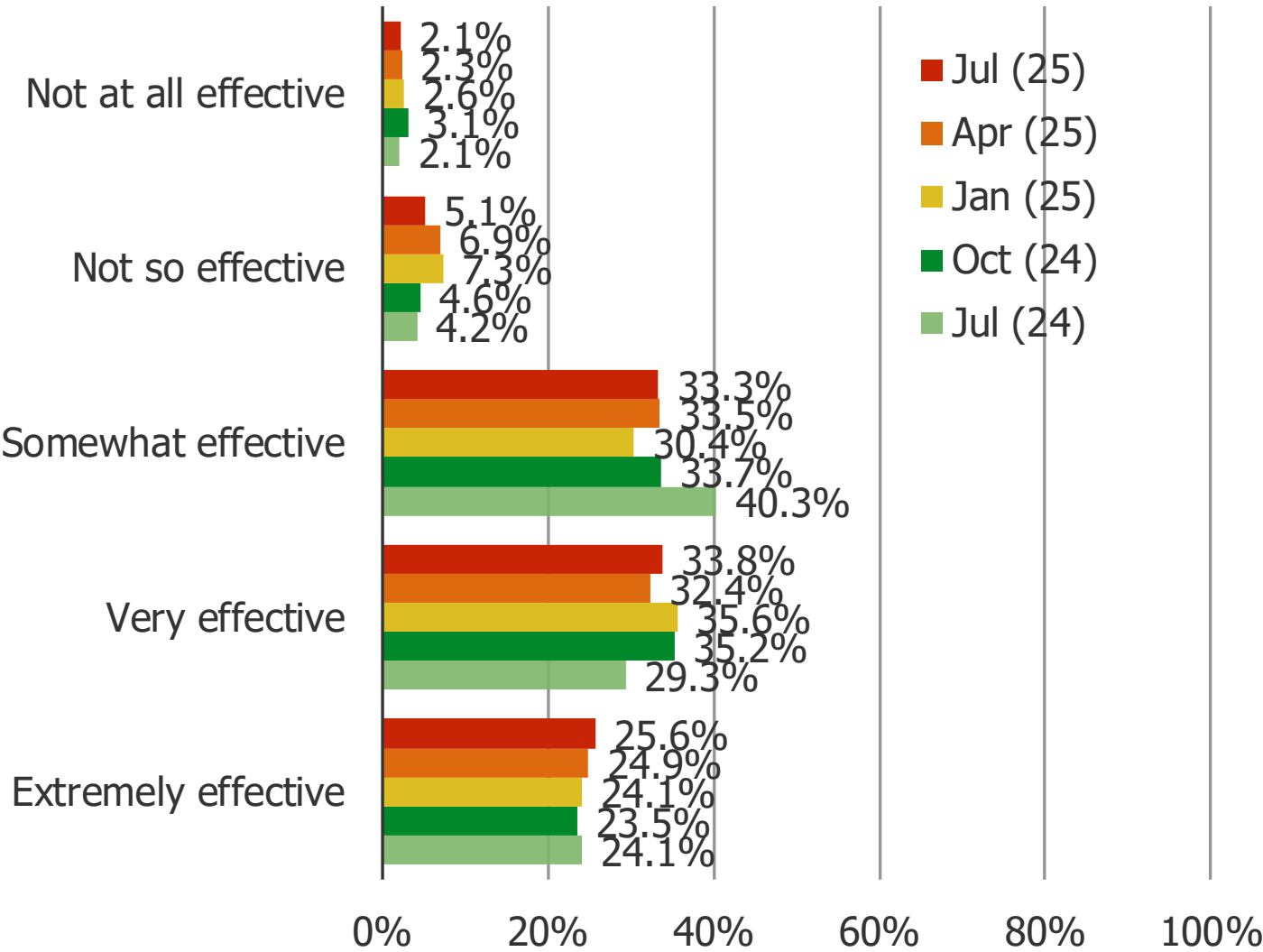
FOR WHICH TASKS DO YOU USE AI CHATBOTS AT WORK? SELECT ALL THAT APPLY

This question was posed to all respondents who use AI chatbots for work (N = 234)



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

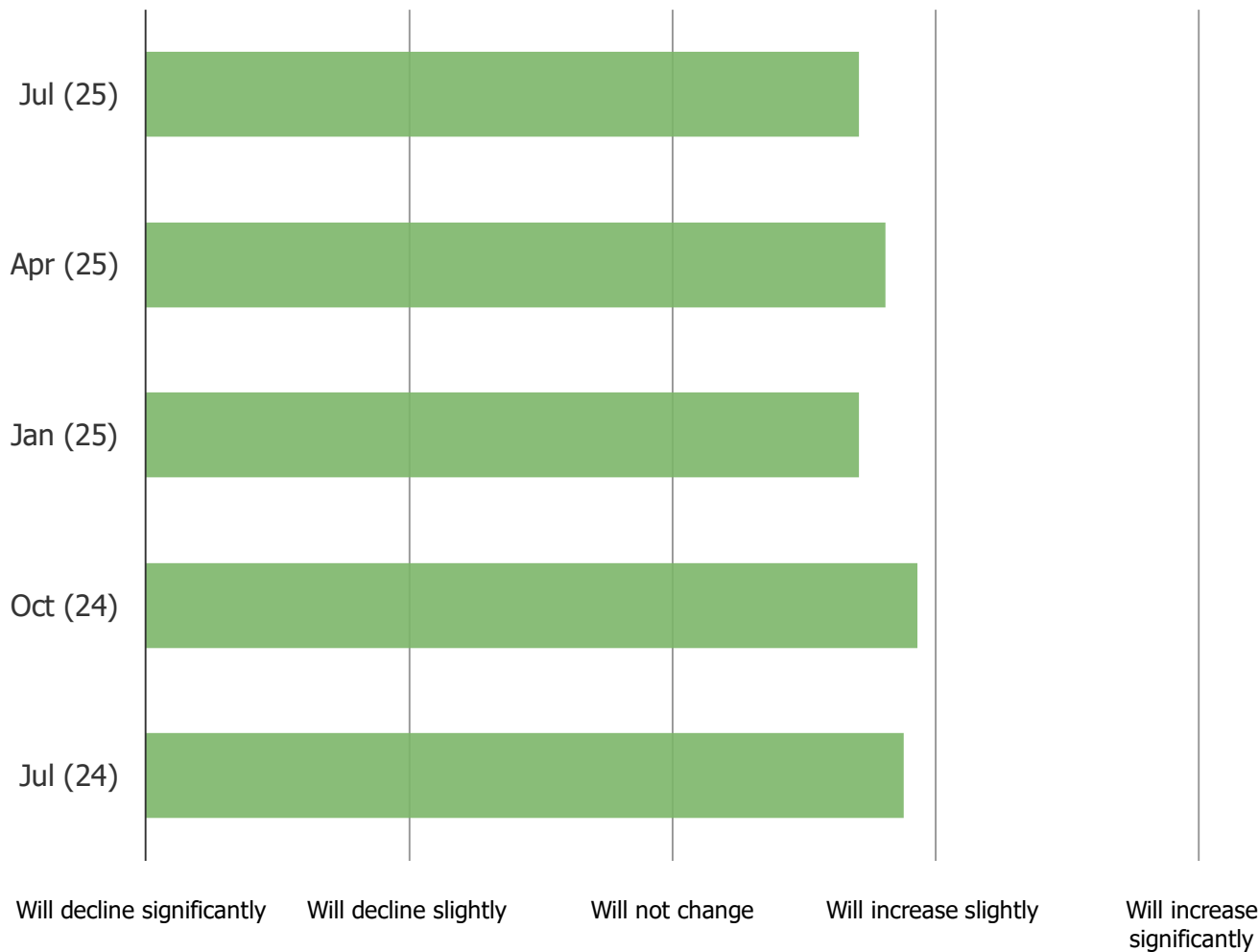
This question was posed to all respondents who use AI chatbots for work (N = 234)





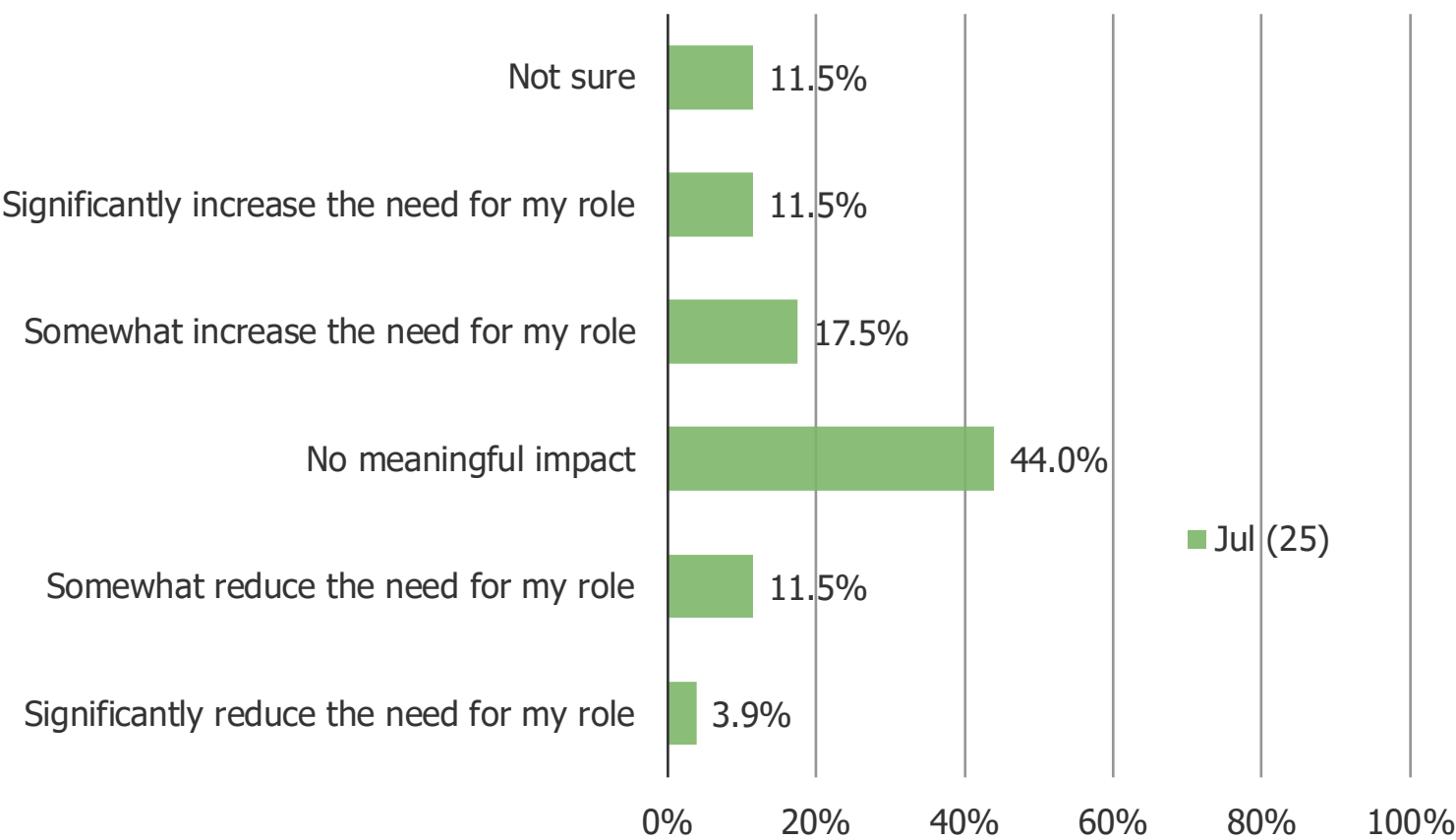
DO YOU EXPECT HOW OFTEN YOU USE AI CHATBOTS AT WORK TO CHANGE GOING FORWARD?

This question was posed to all respondents who use AI chatbots for work (N = 234)



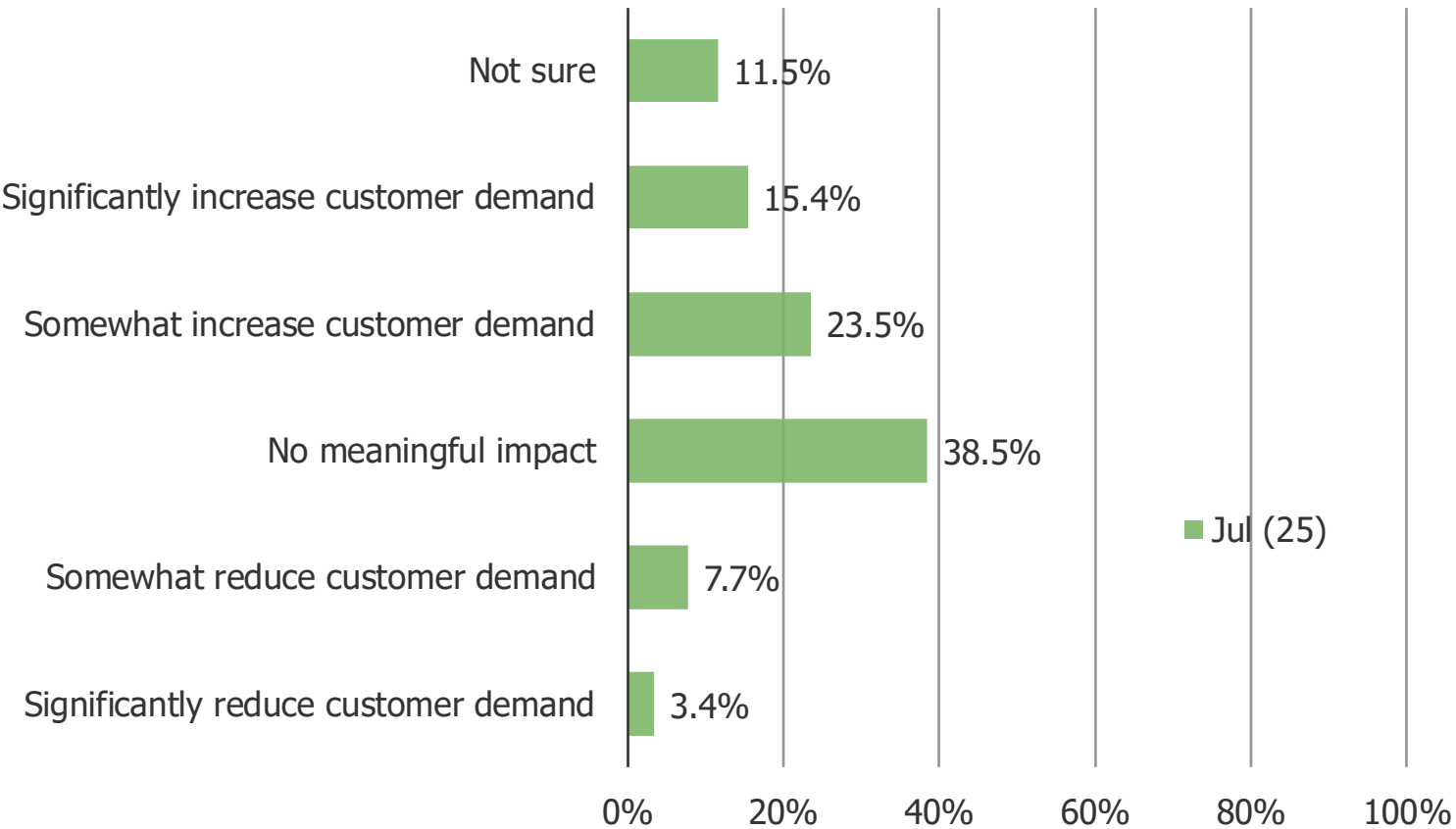
HOW DO YOU EXPECT AI TO IMPACT YOUR COMPANY’S NEED FOR YOUR ROLE IN THE NEXT 2–3 YEARS?

This question was posed to all respondents who AI chatbots for Business.



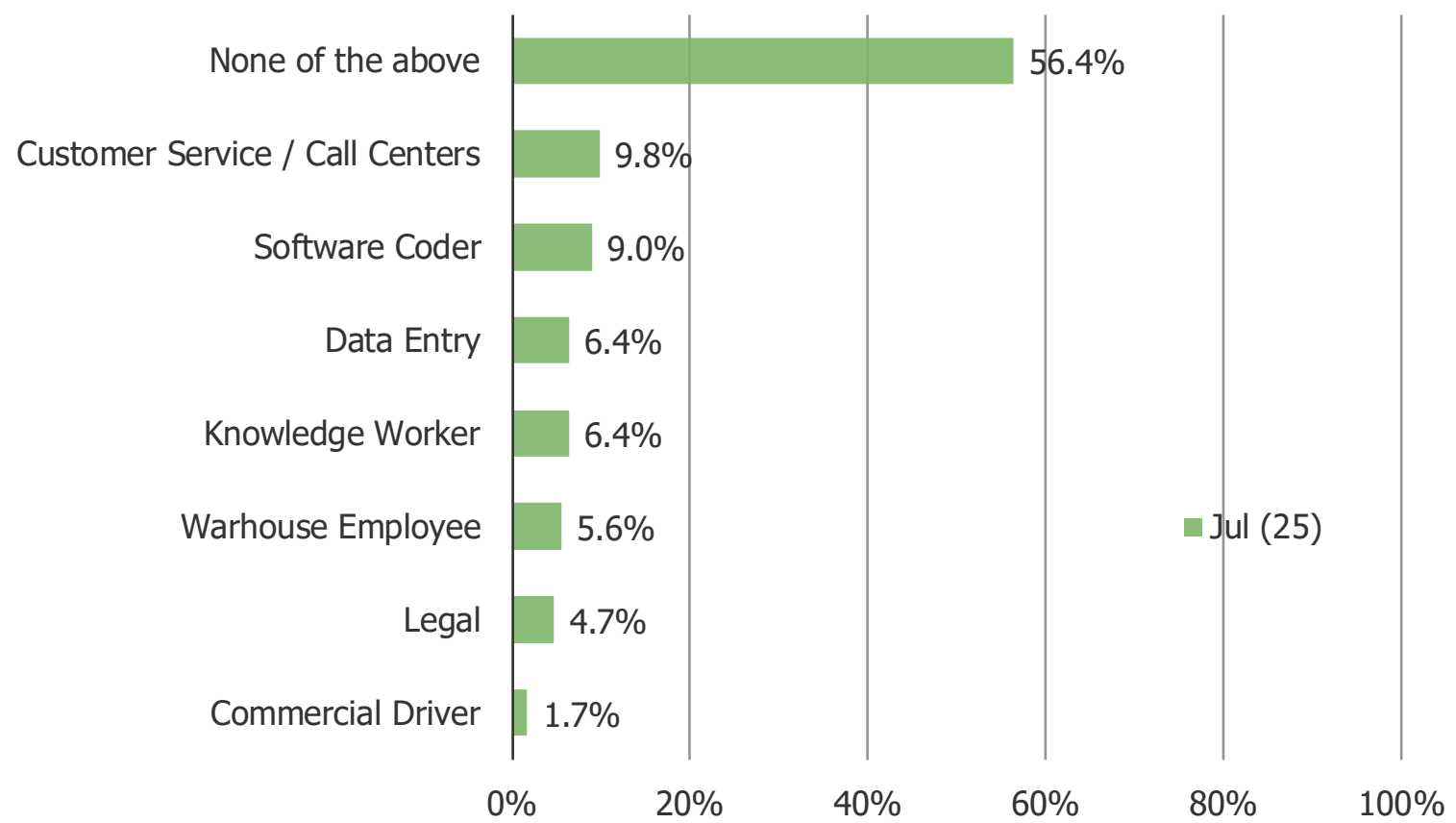
HOW DO YOU EXPECT AI TO IMPACT DEMAND FROM YOUR COMPANY’S CUSTOMERS IN THE NEXT 2–3 YEARS?

This question was posed to all respondents who AI chatbots for Business.



DO YOU CURRENTLY WORK IN THE FOLLOWING AREAS? IF NONE APPLY TO YOU, JUST SELECT NONE PLEASE

This question was posed to all respondents who AI chatbots for Business.



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.

Overall Summary: What People Want from AI

Consumers express a mix of pragmatic hopes and idealistic aspirations for AI. Most desires fall into a few broad categories:

- **Convenience & Efficiency:** People want AI to simplify daily life—scheduling, reminders, automation of repetitive tasks.
- **Health & Medicine:** There’s strong interest in AI improving diagnoses, assisting healthcare providers, and making healthcare more accessible.
- **Personal Assistance:** AI as a smarter version of a virtual assistant—helpful in homes, at work, and on the go.
- **Education & Learning:** Respondents want AI to enhance personalized learning or tutoring.
- **Creativity & Entertainment:** Many hope AI can help with creative writing, music, or other hobbies.
- **Problem Solving & Innovation:** There are ambitions for AI to solve societal issues like climate change or help discover cures.
- **Jobs & Productivity:** Some hope AI will make work more productive; others worry but hope it won’t replace human jobs unfairly.
- **Safety & Ethics:** A subset wants AI to be developed ethically and used for good, not surveillance or manipulation.

Top Overall Themes (Most Common Words Mentioned)

Theme	Example Words
Help / Assistance	help, assist, assistant, support
Health / Medical	health, medical, diagnosis, doctor, healthcare
Work / Jobs	work, job, productivity, automate, tasks
Learning / Education	learning, education, teach, tutor, understand
Home / Life	home, life, easier, manage, daily
Time / Efficiency	time, faster, save, reduce
Creativity / Art	creative, music, write, generate, draw
Ethics / Control	control, safe, ethical, trust, responsible

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.

## Trends Over Time

### 2023 H1–Mid 2023:

- Initial hopes heavily focused on **convenience and curiosity**.
- “Help,” “easier,” and “understand” dominate — people were trying to grasp what AI could do.
- Early adopters mention “learning,” “tasks,” “assist” — practical expectations.

### Late 2023:

- Increase in mentions of “**jobs**” and “**work**”, reflecting growing awareness of AI’s workplace impact.
- “Healthcare” and “diagnosis” start to appear more often—greater interest in AI in medicine.
- More emotional or philosophical mentions like “life,” “better,” and “future.”

### 2024:

- Surge in **productivity and creative tool expectations**: “generate,” “write,” “music.”
- Ethical concerns start to rise subtly: words like “safe,” “control,” and “ethics” show up more.
- Interest in AI for **education and tutoring** becomes more consistent.

### 2025:

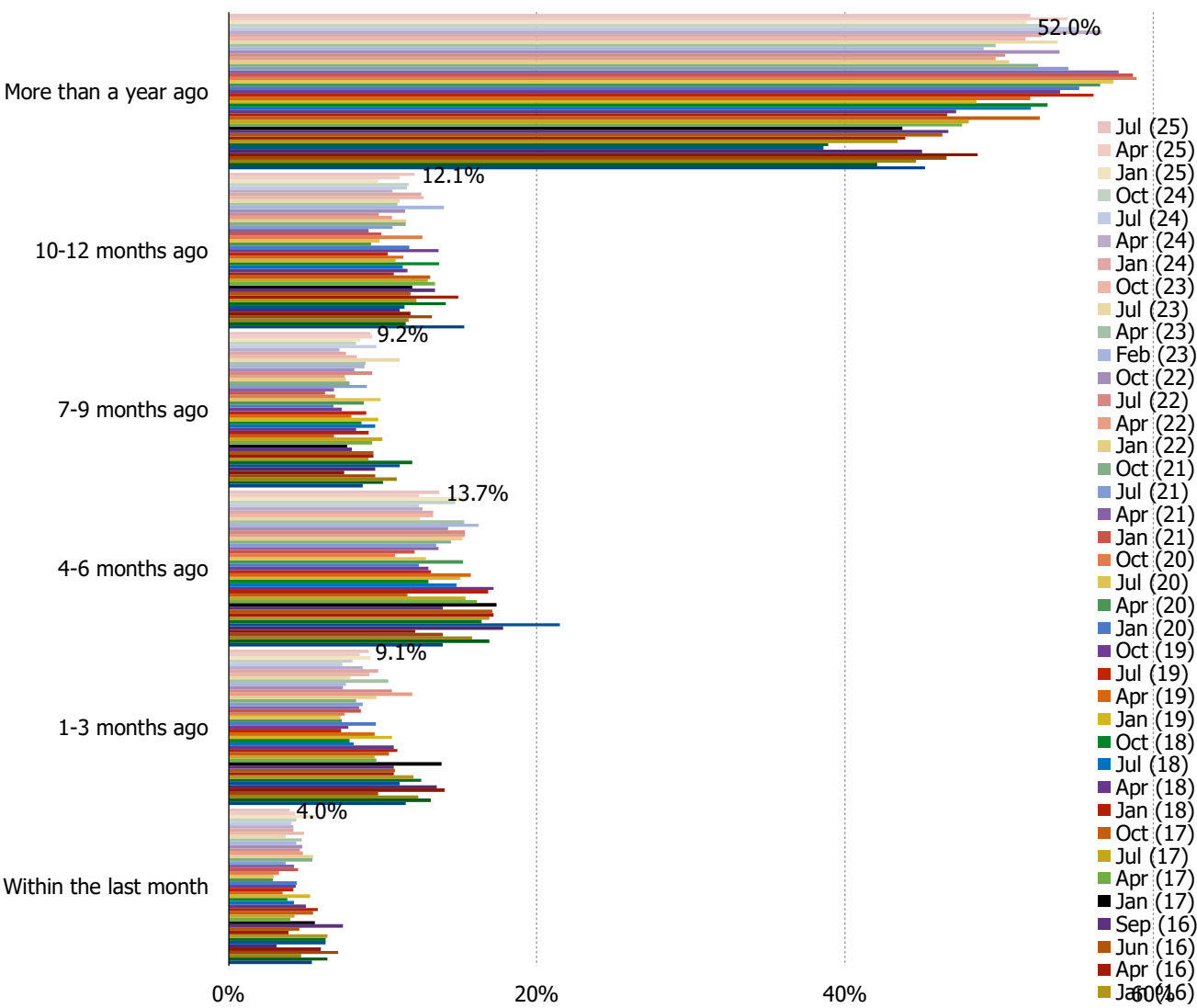
- People are much clearer in their desires: “**personal assistant**,” “**help with health**,” “**less stress**,” suggesting maturing expectations.
- Practical integration into life is assumed; hope now focuses on **doing things well and ethically**.
- Concerns about “jobs” remain, but fewer panic-style responses—more balanced outlook.

# SMARTPHONE REFRESH CYCLES

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WHEN DID YOU GET YOUR CURRENT SMARTPHONE?

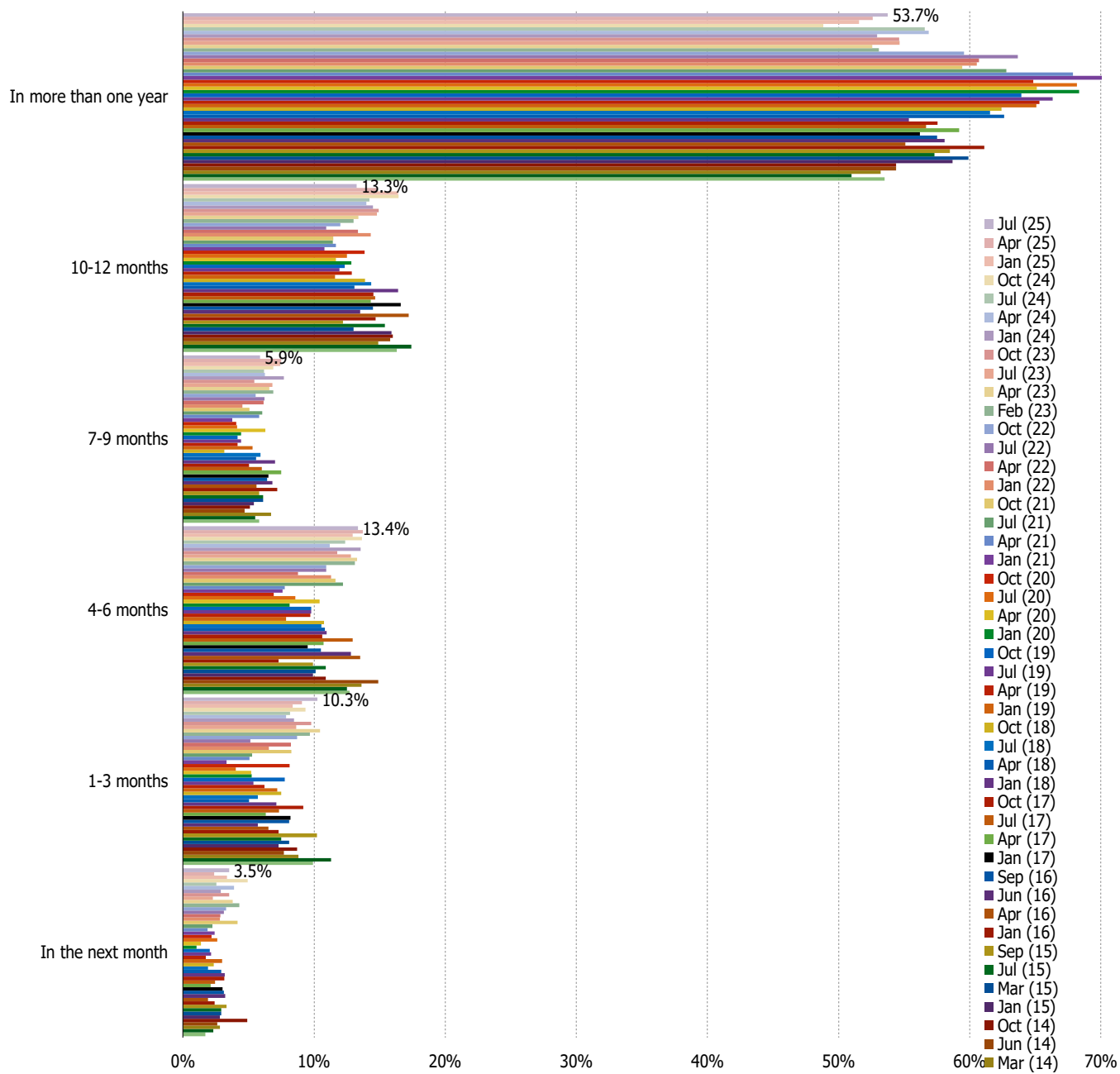
This question was posed to smartphone owners.





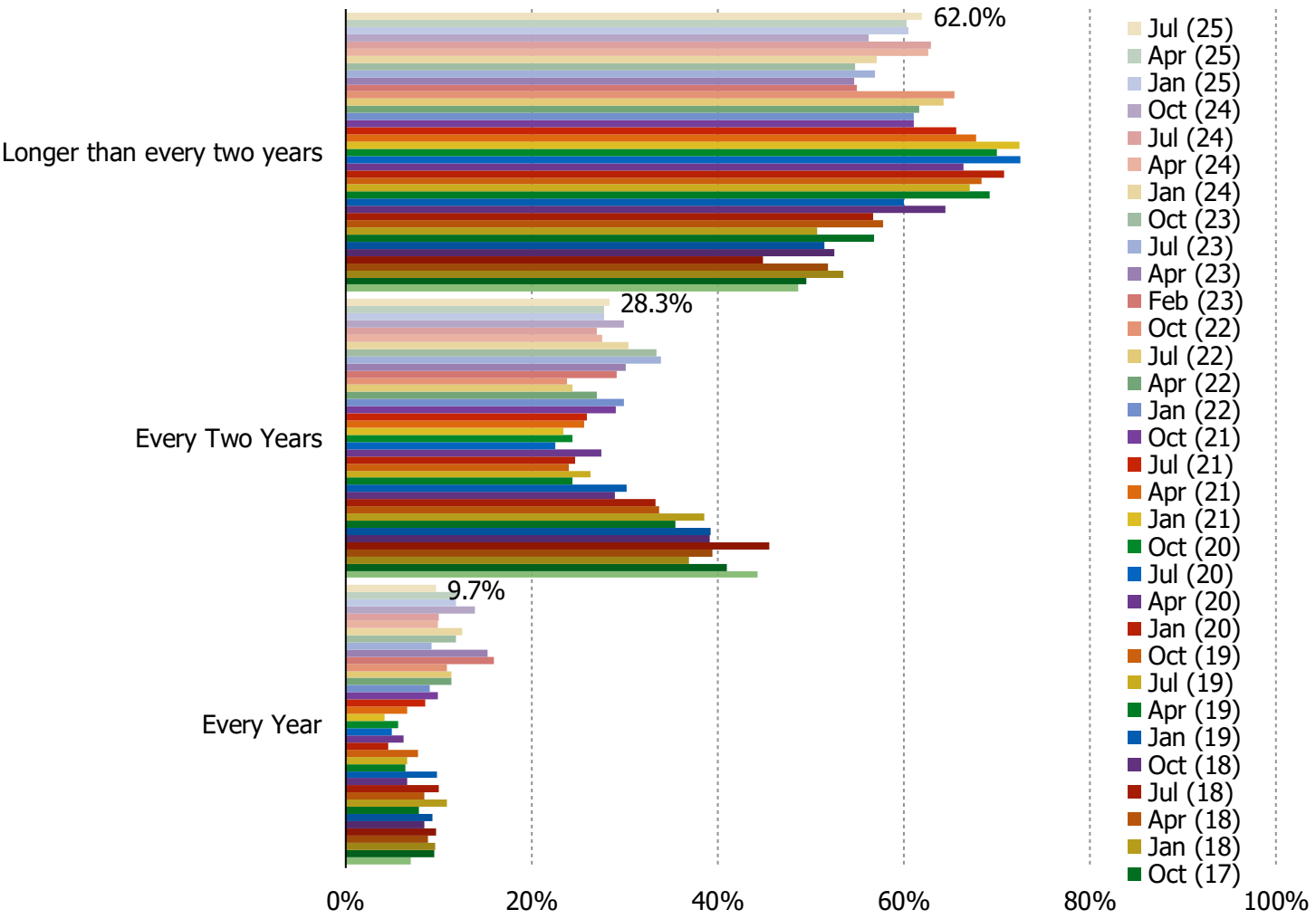
EXPECTED DATE OF NEXT SMARTPHONE PURCHASE

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.

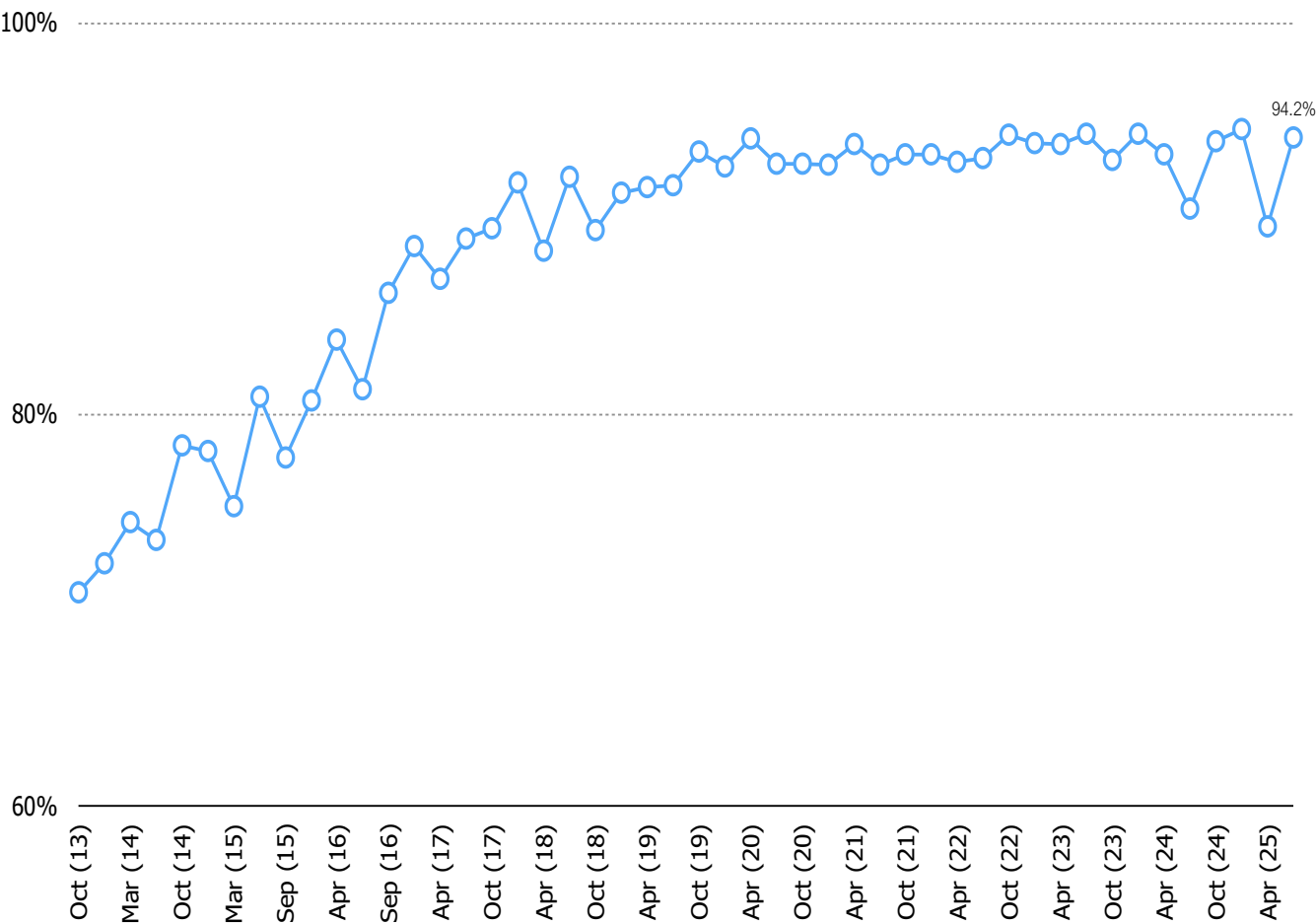


# SMARTPHONE MARKET SHARE AND MIX

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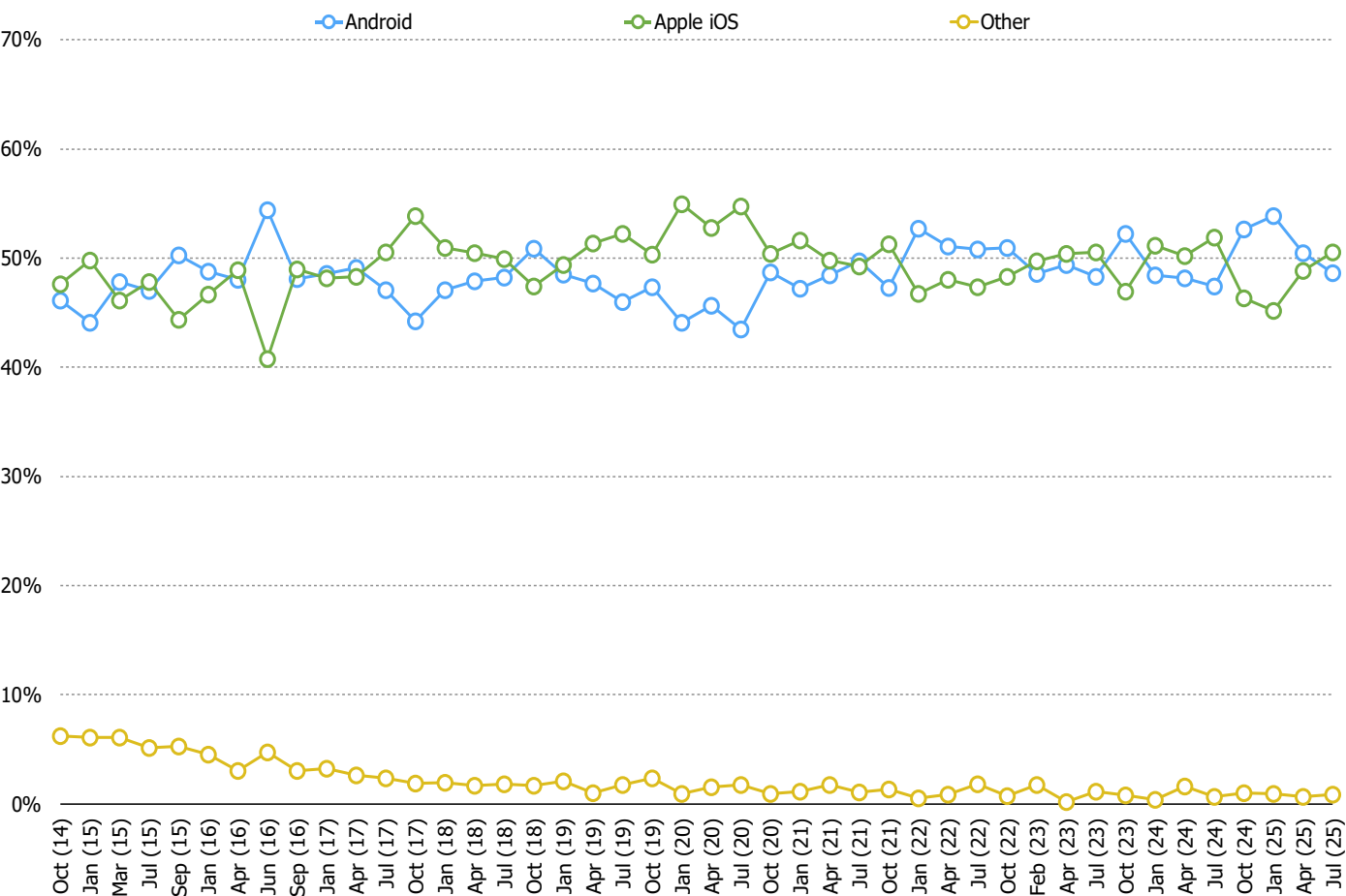
DO YOU OWN A SMARTPHONE?

This question was posed to all consumers.



CURRENT OPERATING SYSTEM FOR SMARTPHONE

This question was posed to smartphone owners.

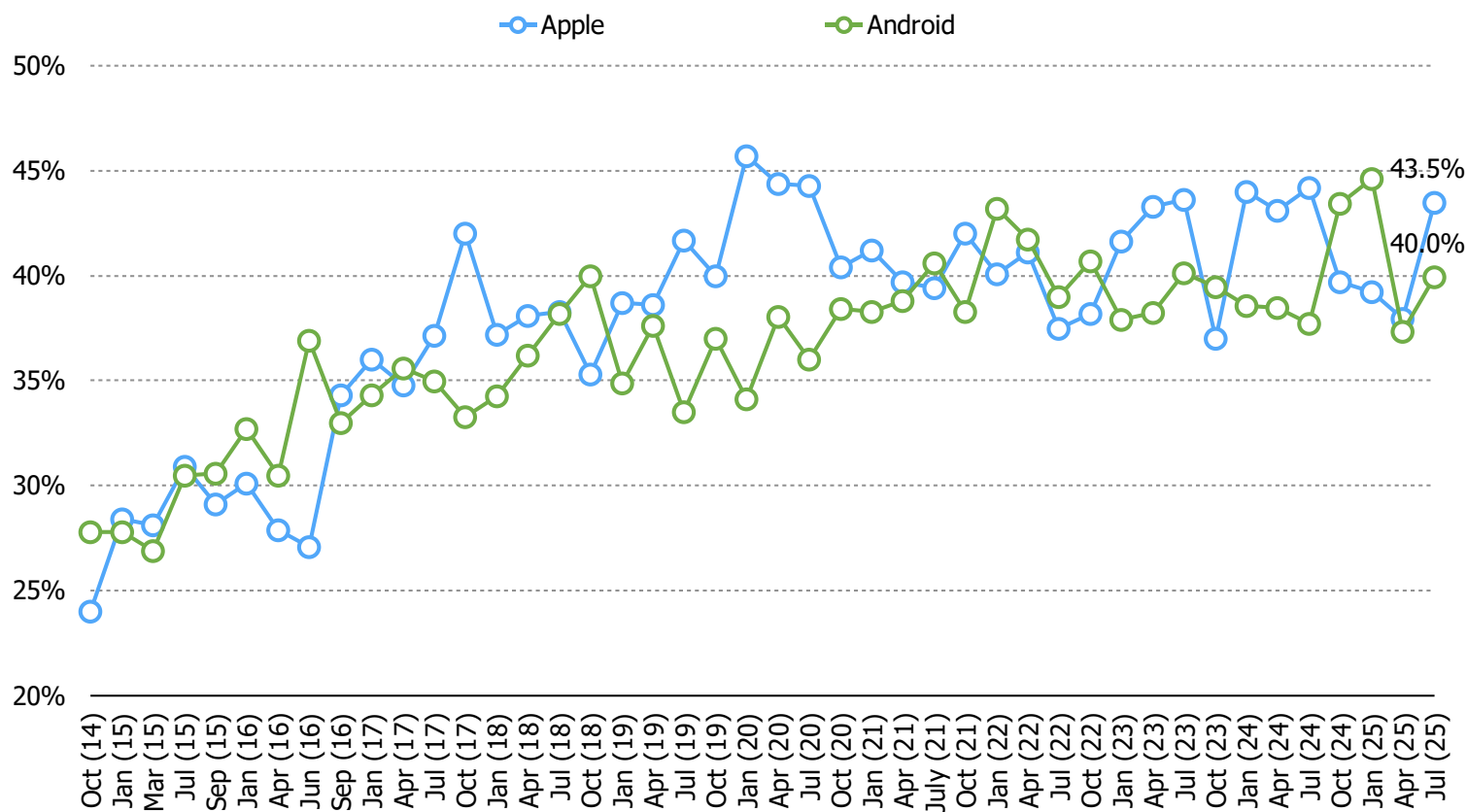


This question was posed to Android owners.



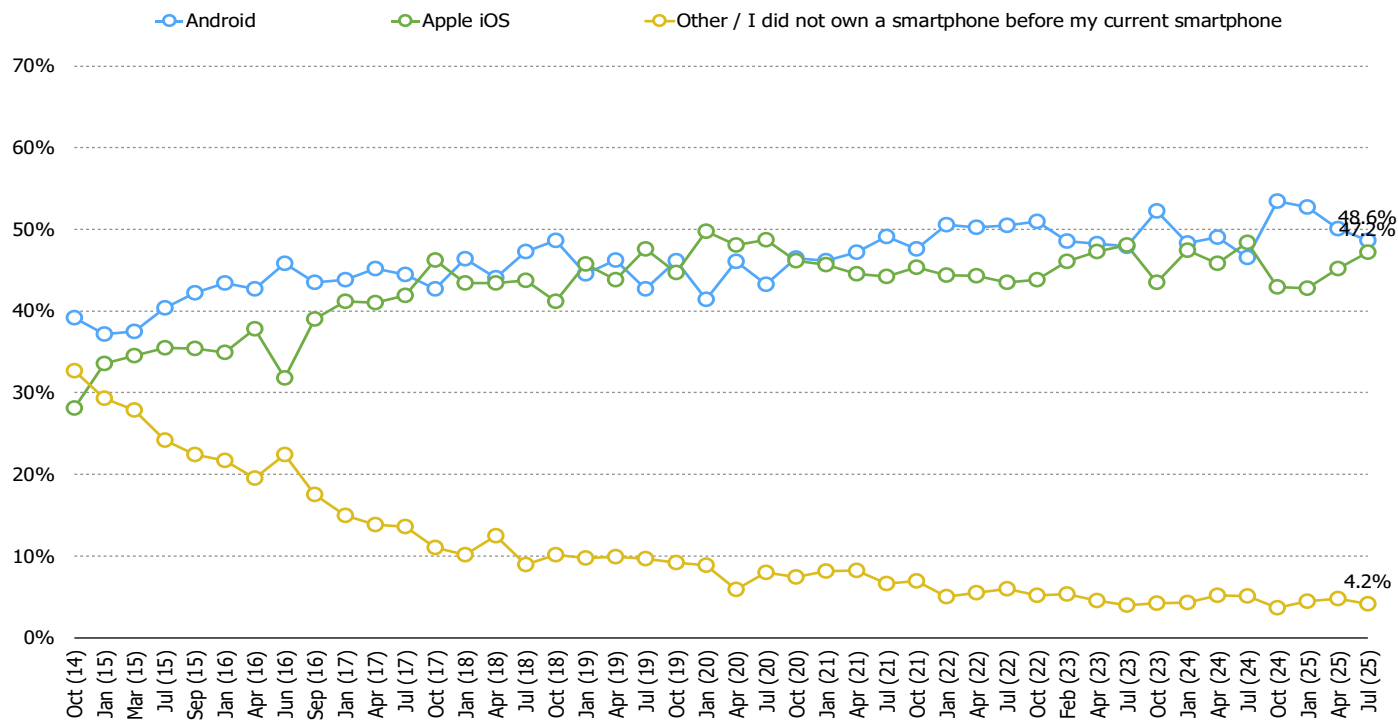
“TRIPLE PLAYS” – PERCENTAGE OF SMARTPHONE OWNERS WHO OWN THE SAME OPERATING SYSTEM FOR LAST PHONE, CURRENT PHONE, AND PLAN TO USE SAME FOR NEXT PHONE

This question was posed to smartphone owners.



OPERATING SYSTEM FOR SMARTPHONE BEFORE CURRENT SMARTPHONE

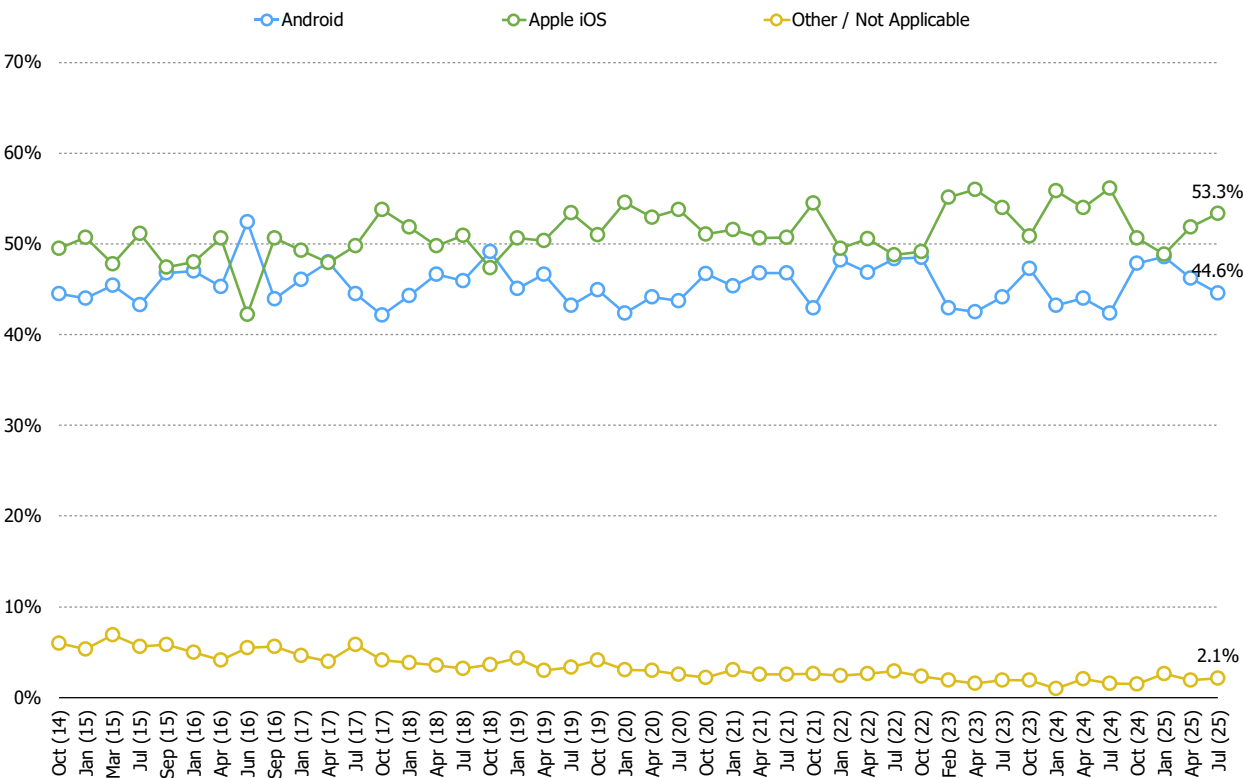
This question was posed to smartphone owners.



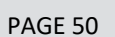


OPERATING SYSTEM FOR NEXT SMARTPHONE

This question was posed to smartphone owners.

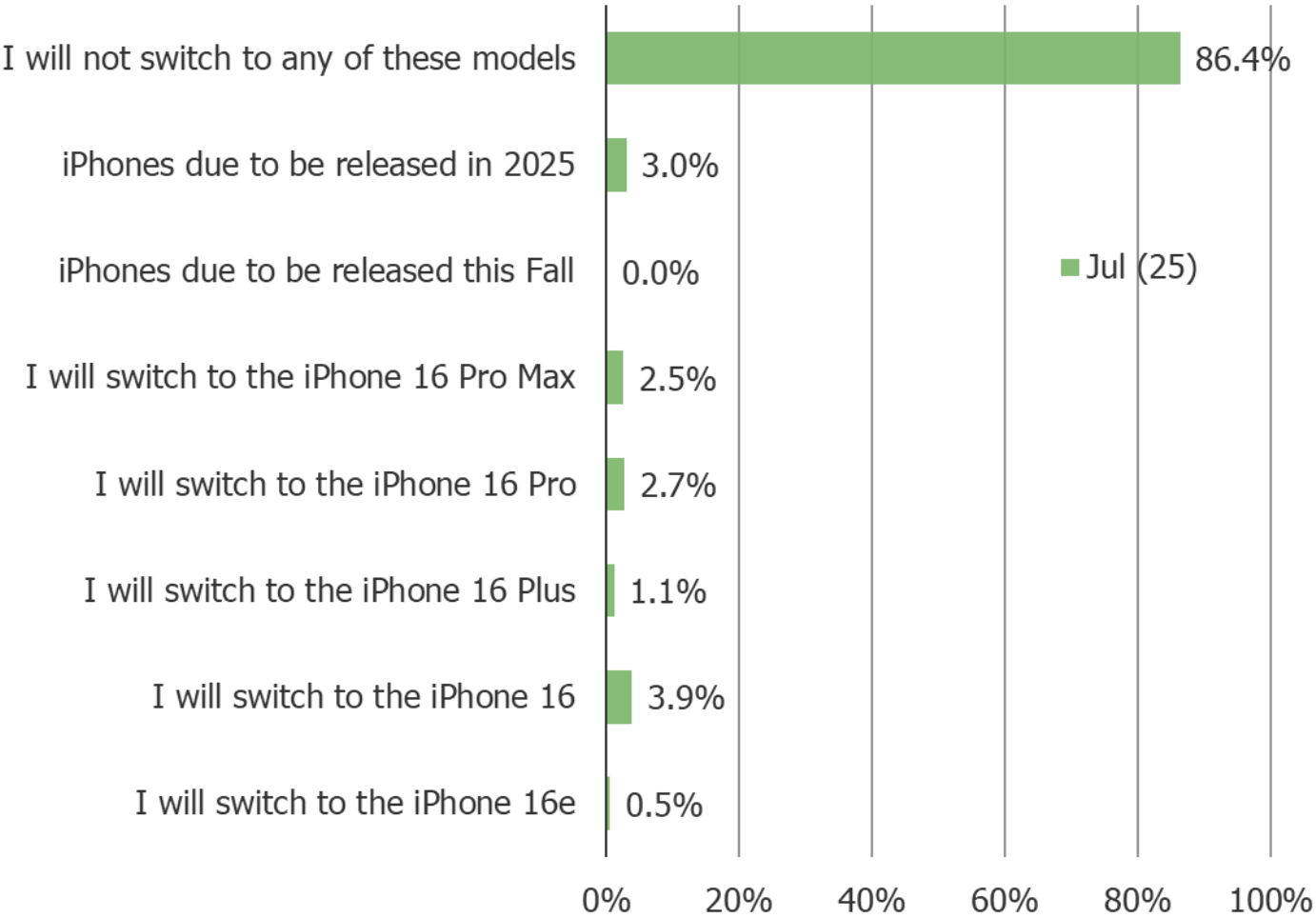


This question was posed to smartphone owners.



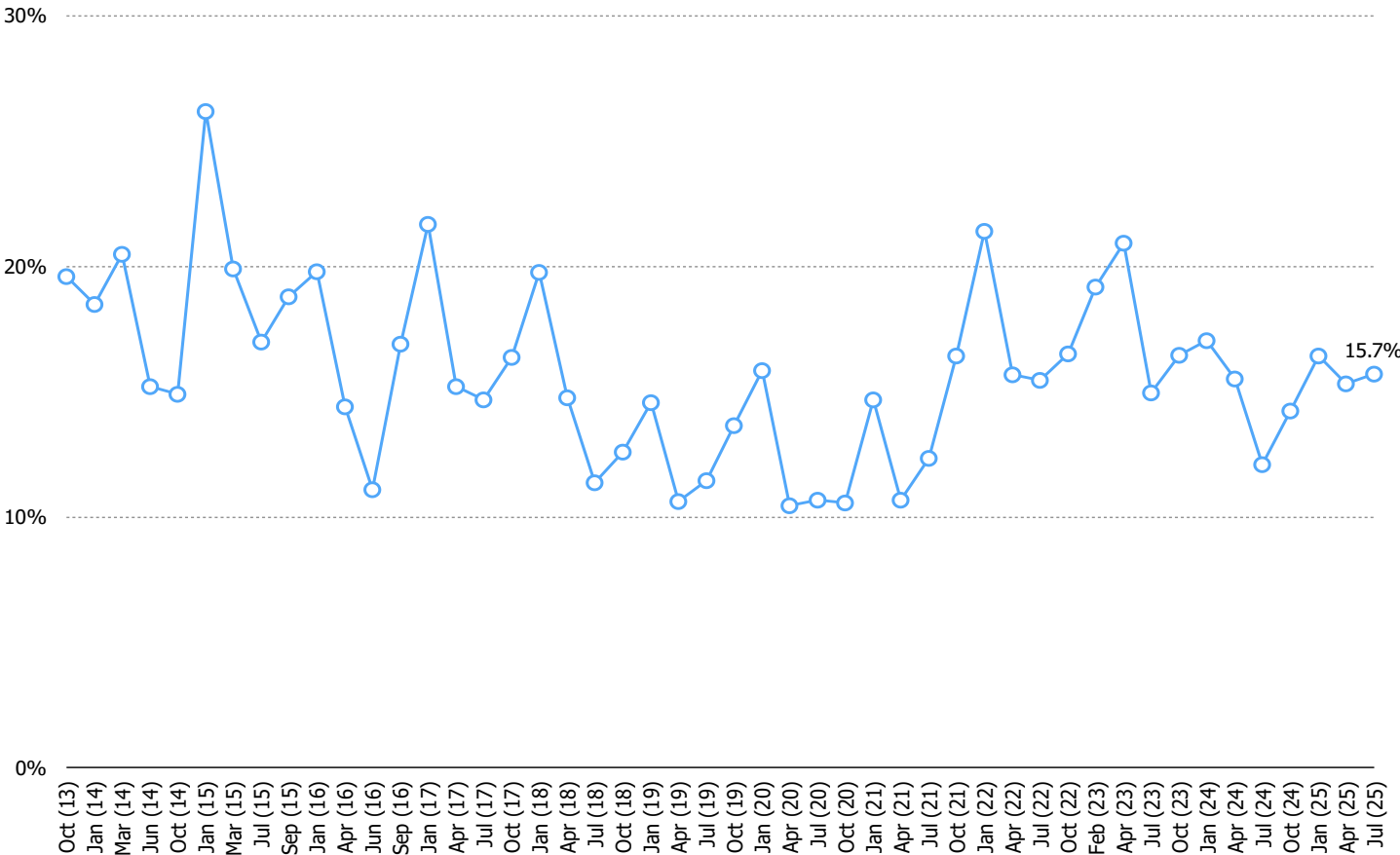
DO YOU PLAN TO SWITCH TO ANY OF THE LATEST OR UPCOMING IPHONES WHEN IT IS TIME TO GET A NEW SMARTPHONE?

This question was posed to Android smartphone owners.

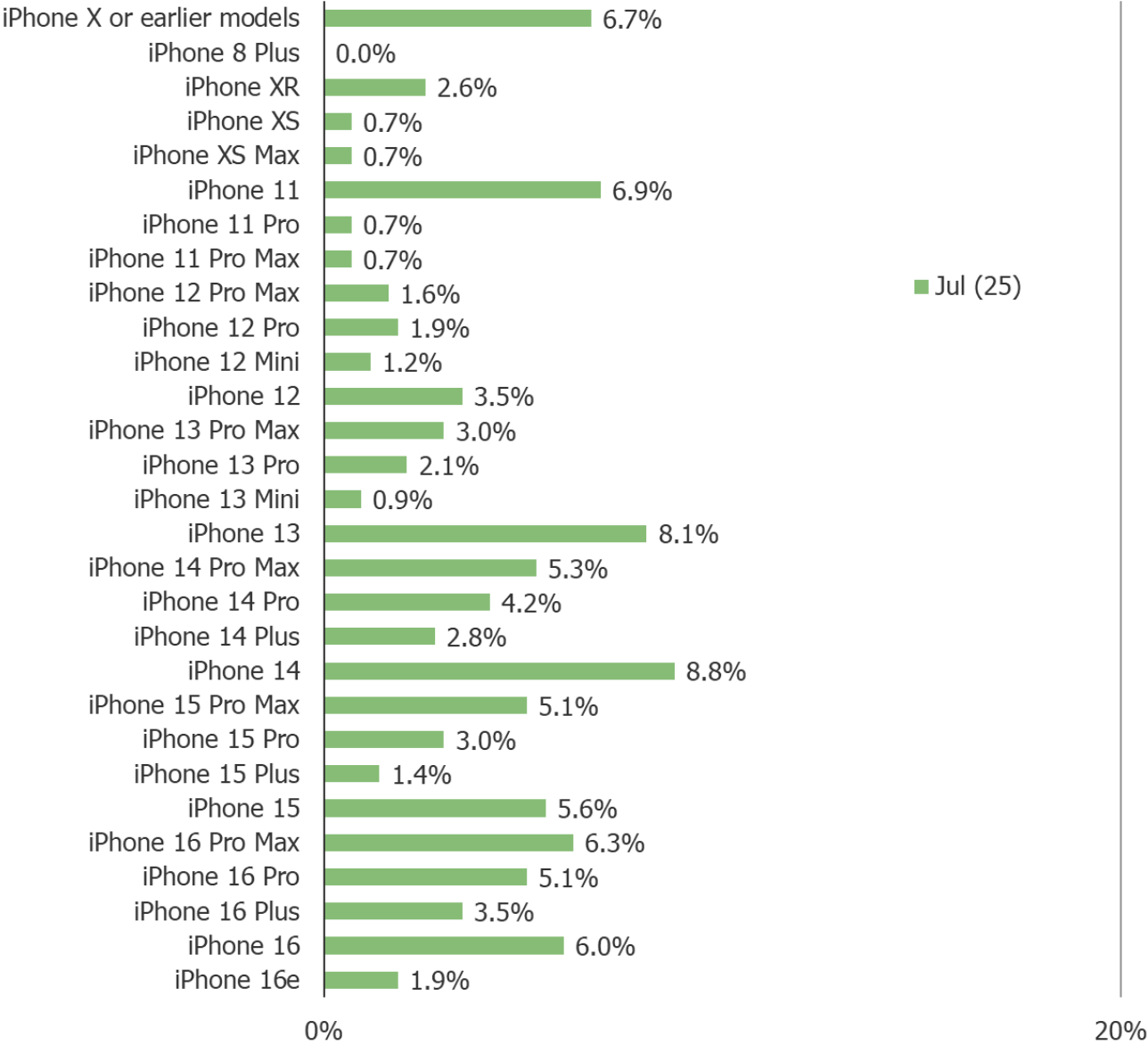


GOT IPHONE WITHIN PAST THREE MONTHS

This question was posed to iPhone owners.

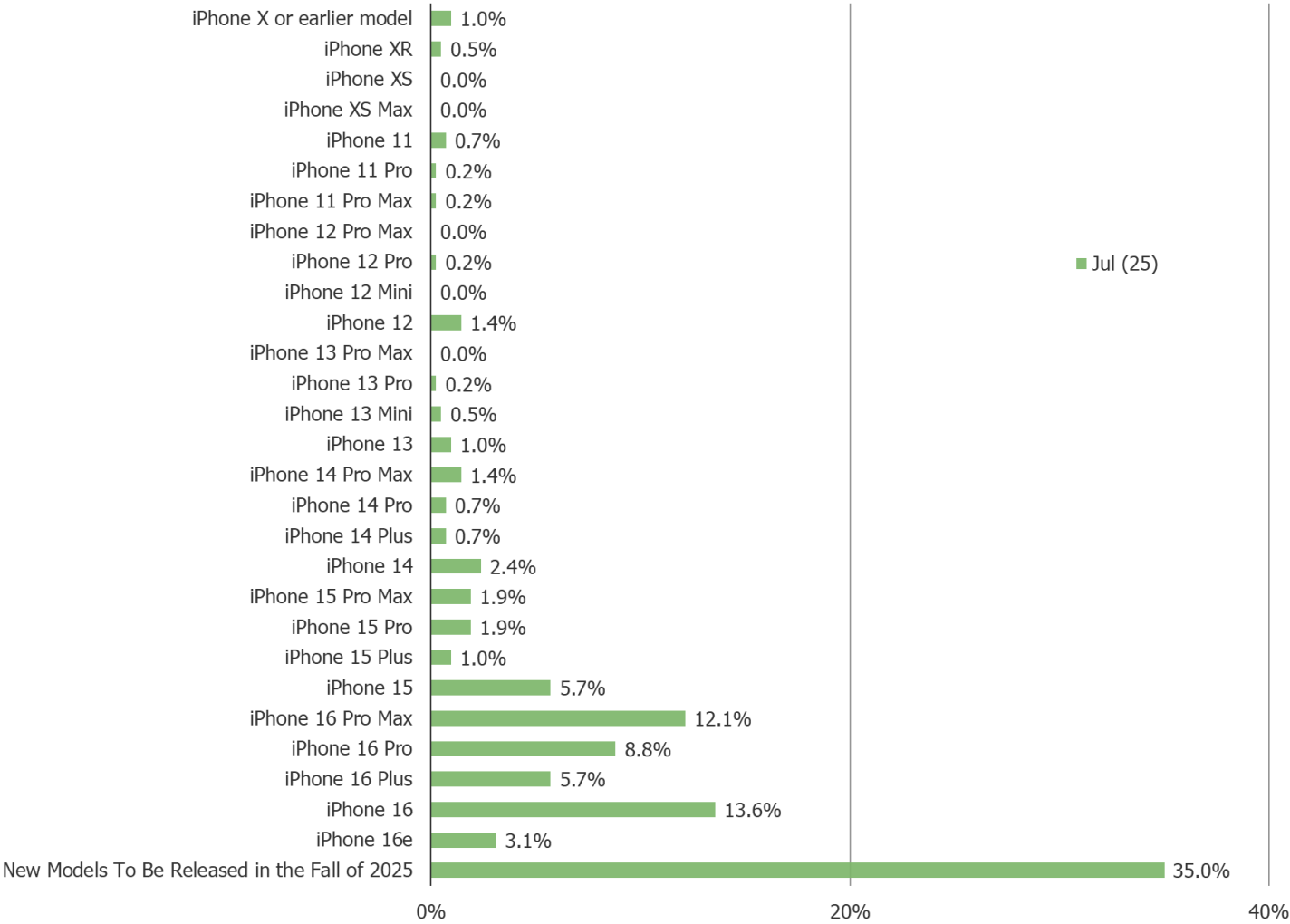


IPHONE MIX – WHICH MODEL DO YOU CURRENTLY OWN?



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.

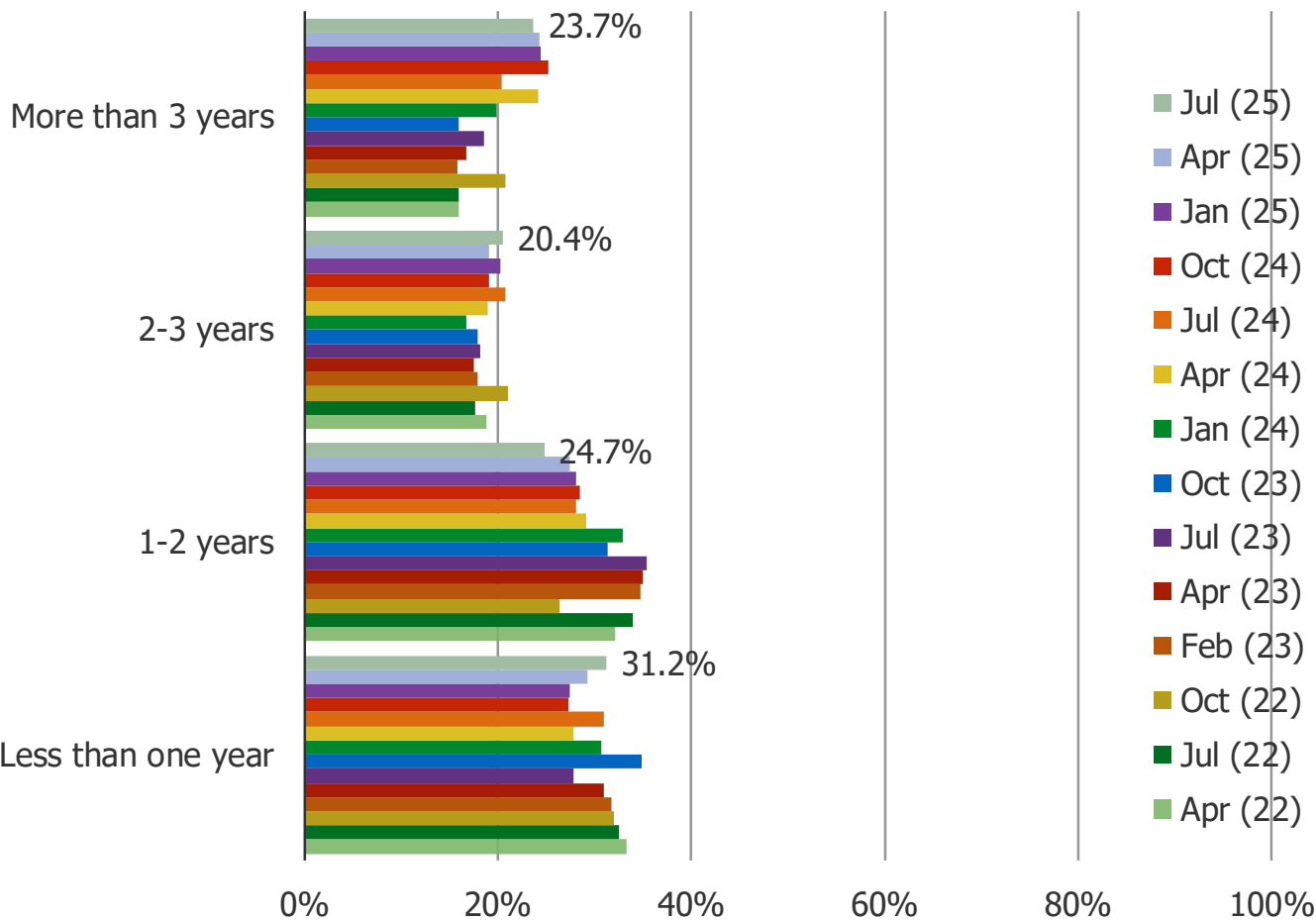


# IPHONE PURCHASE PREFERENCES AND TESTING A LEASING MODEL

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FOR HOW LONG HAVE YOU OWNED YOUR CURRENT IPHONE?

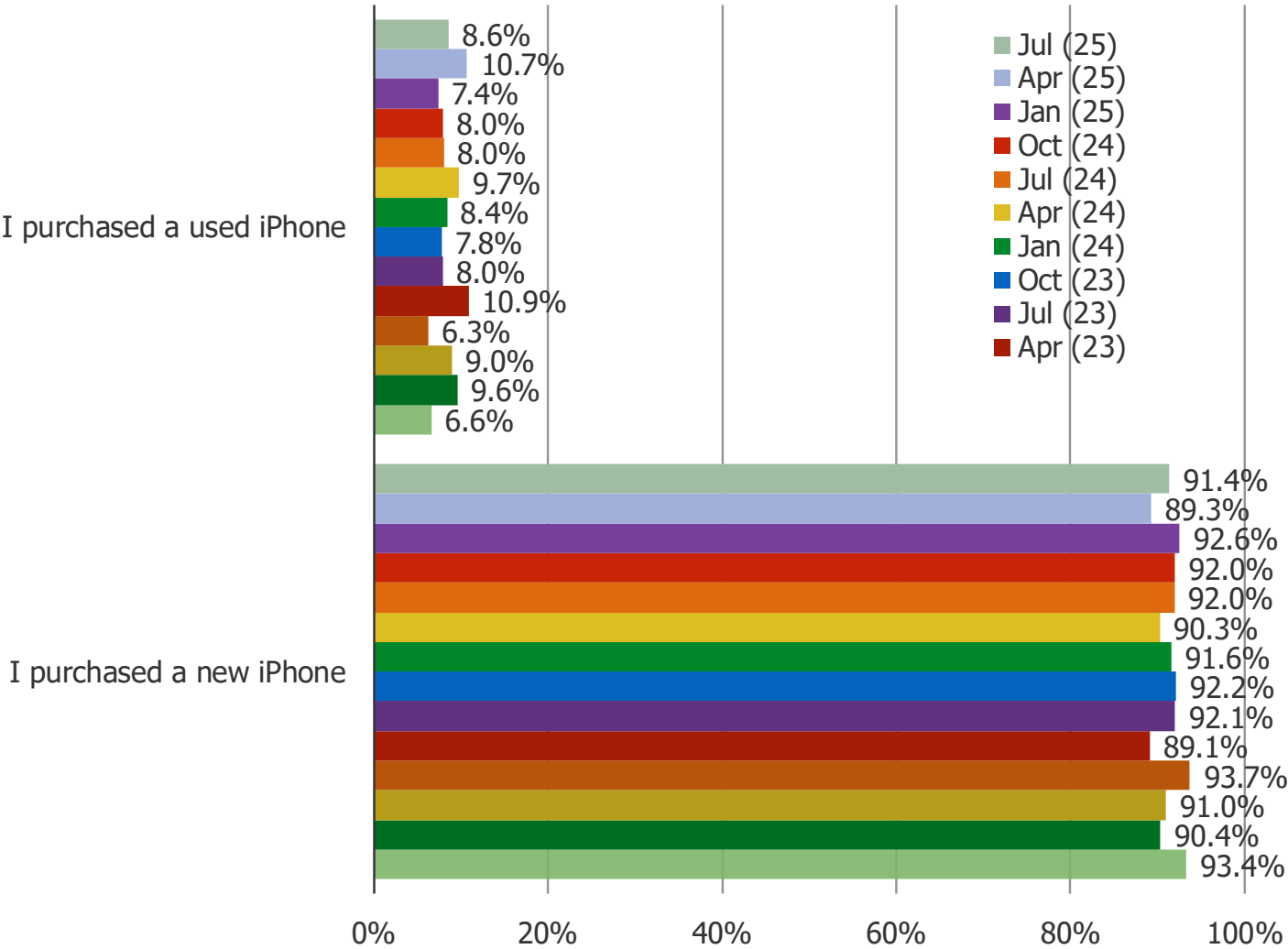
This question was posed to iPhone owners.





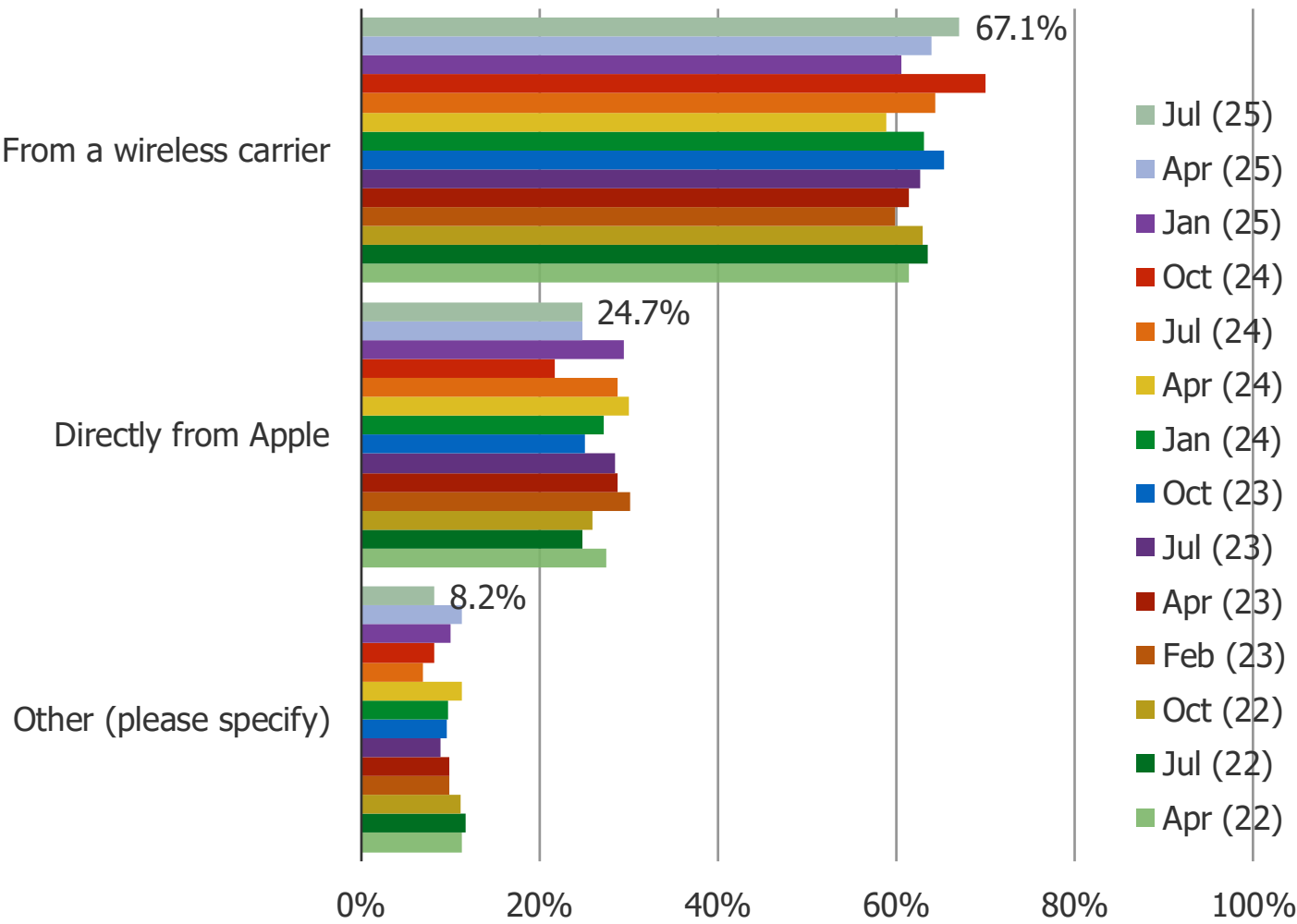
HOW DID YOU PURCHASE YOUR IPHONE?

This question was posed to iPhone owners.



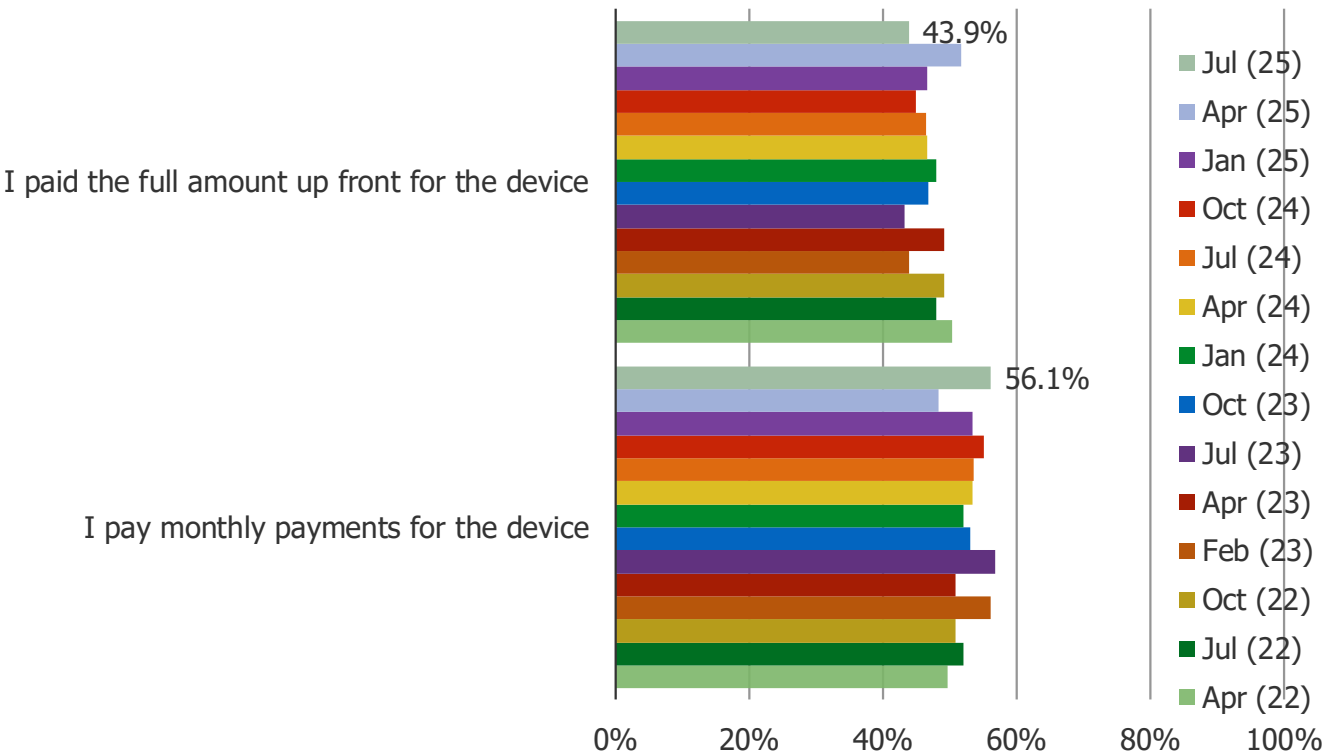
HOW DID YOU PURCHASE YOUR CURRENT IPHONE?

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.

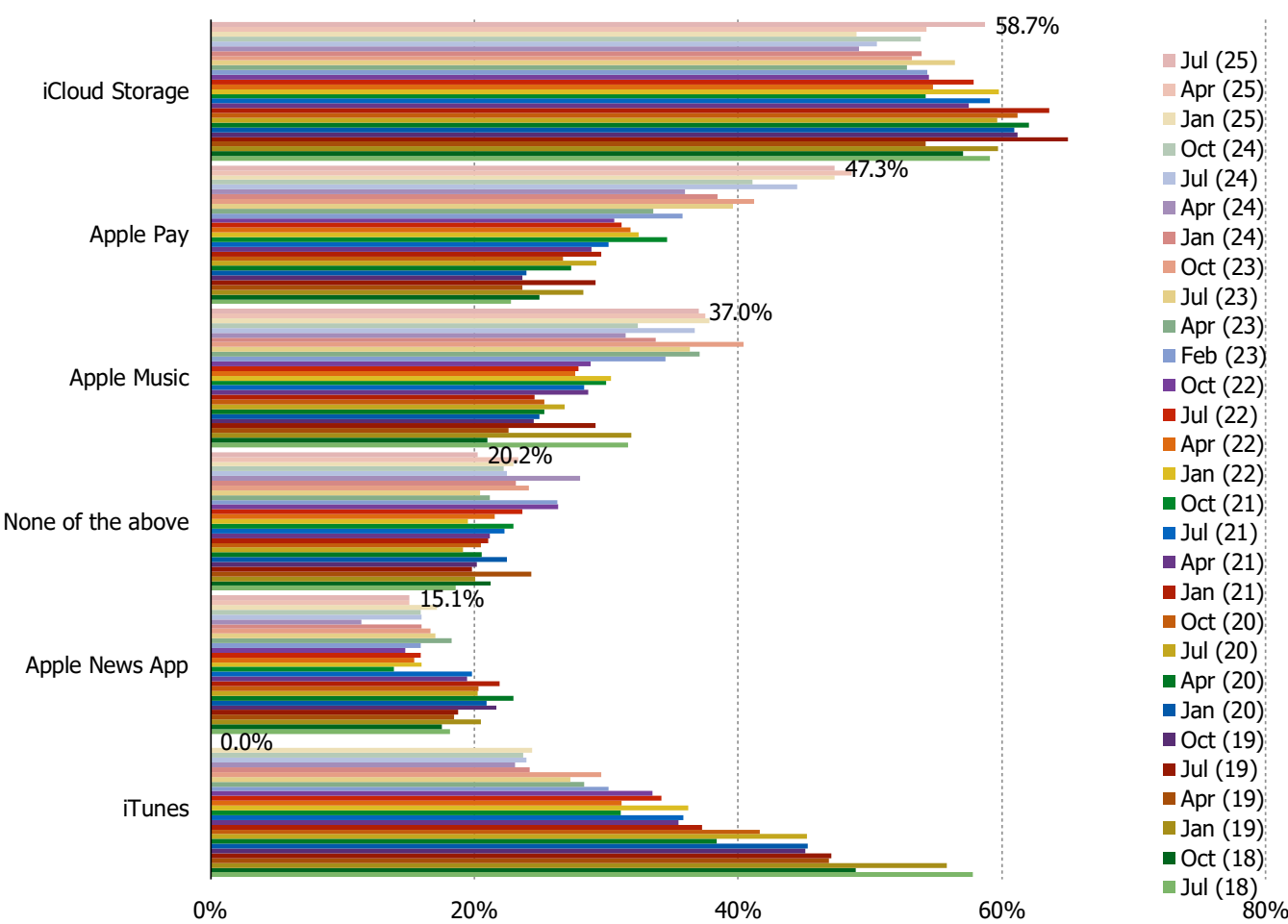


# AAPL PAY QUESTIONS

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

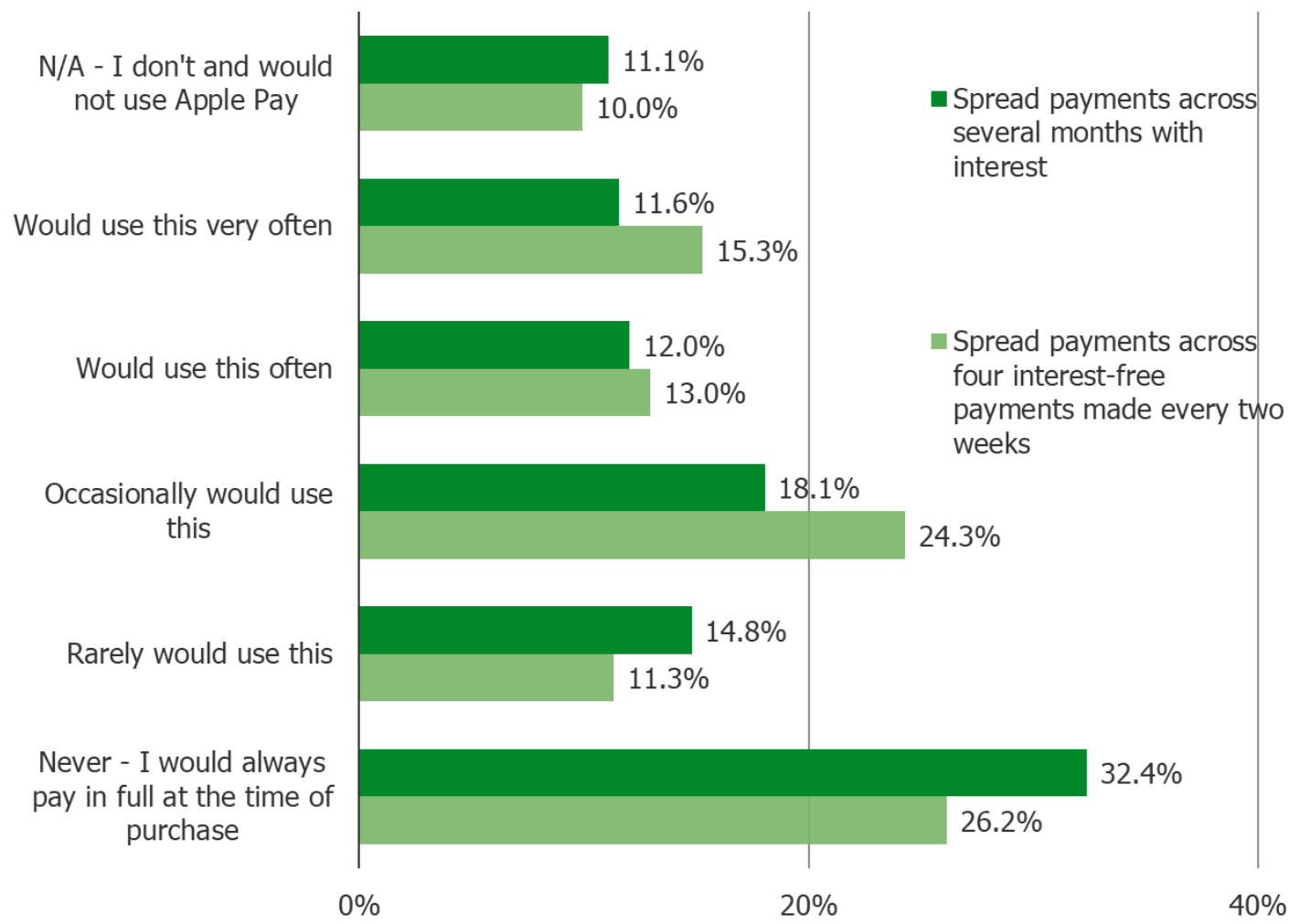
This question was posed to iPhone owners.



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.

JULY 2025

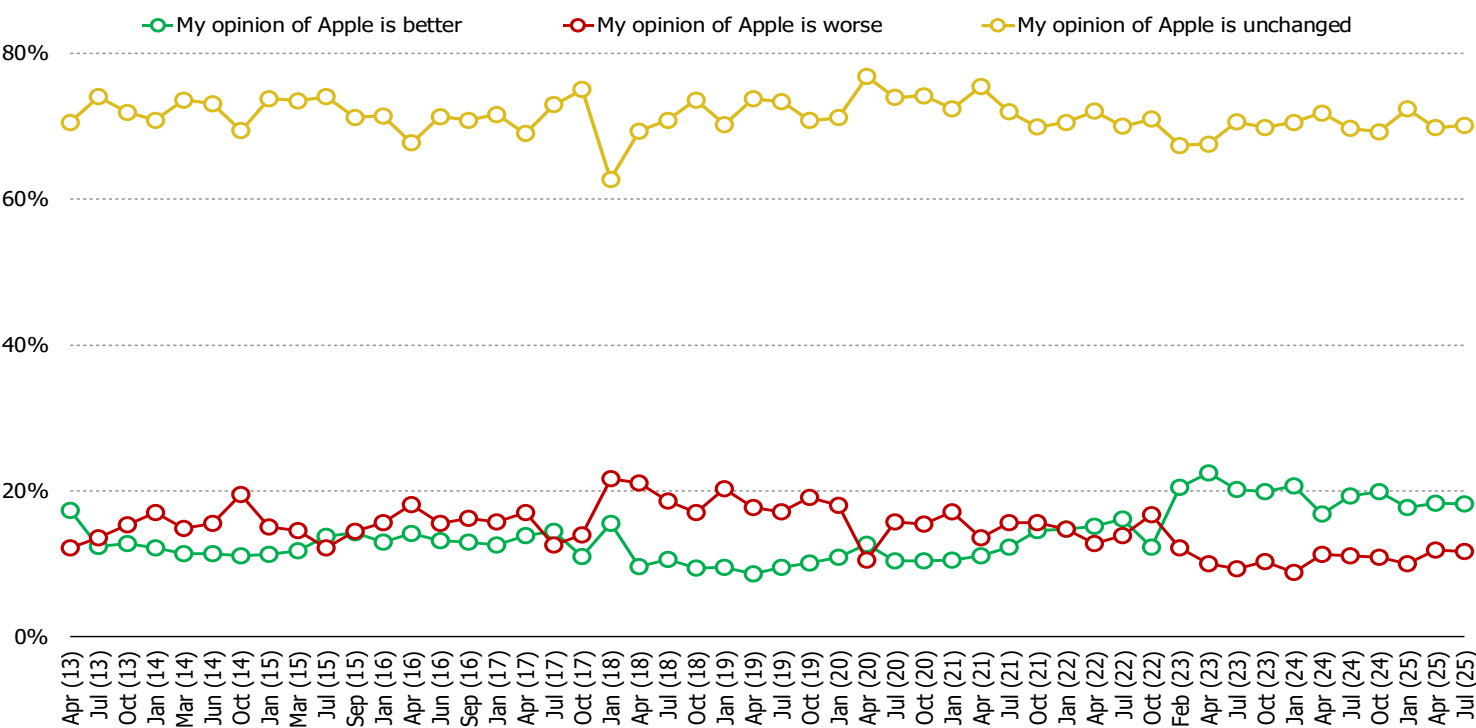


# CONSUMER SENTIMENT

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HAS YOUR OPINION OF APPLE CHANGED OVER THE PAST YEAR?

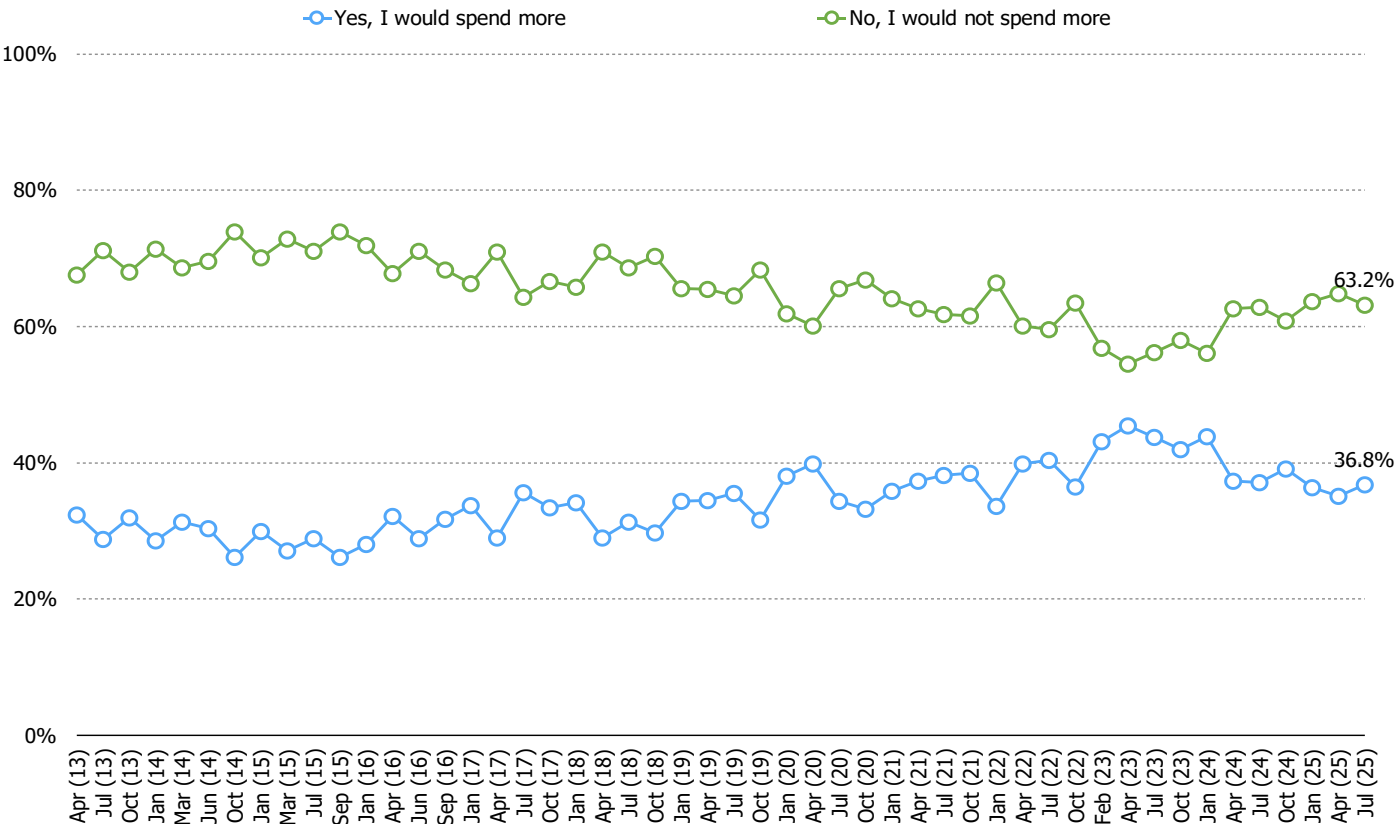
This question was posed to all respondents





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.

