

BESPOKE SURVEYS

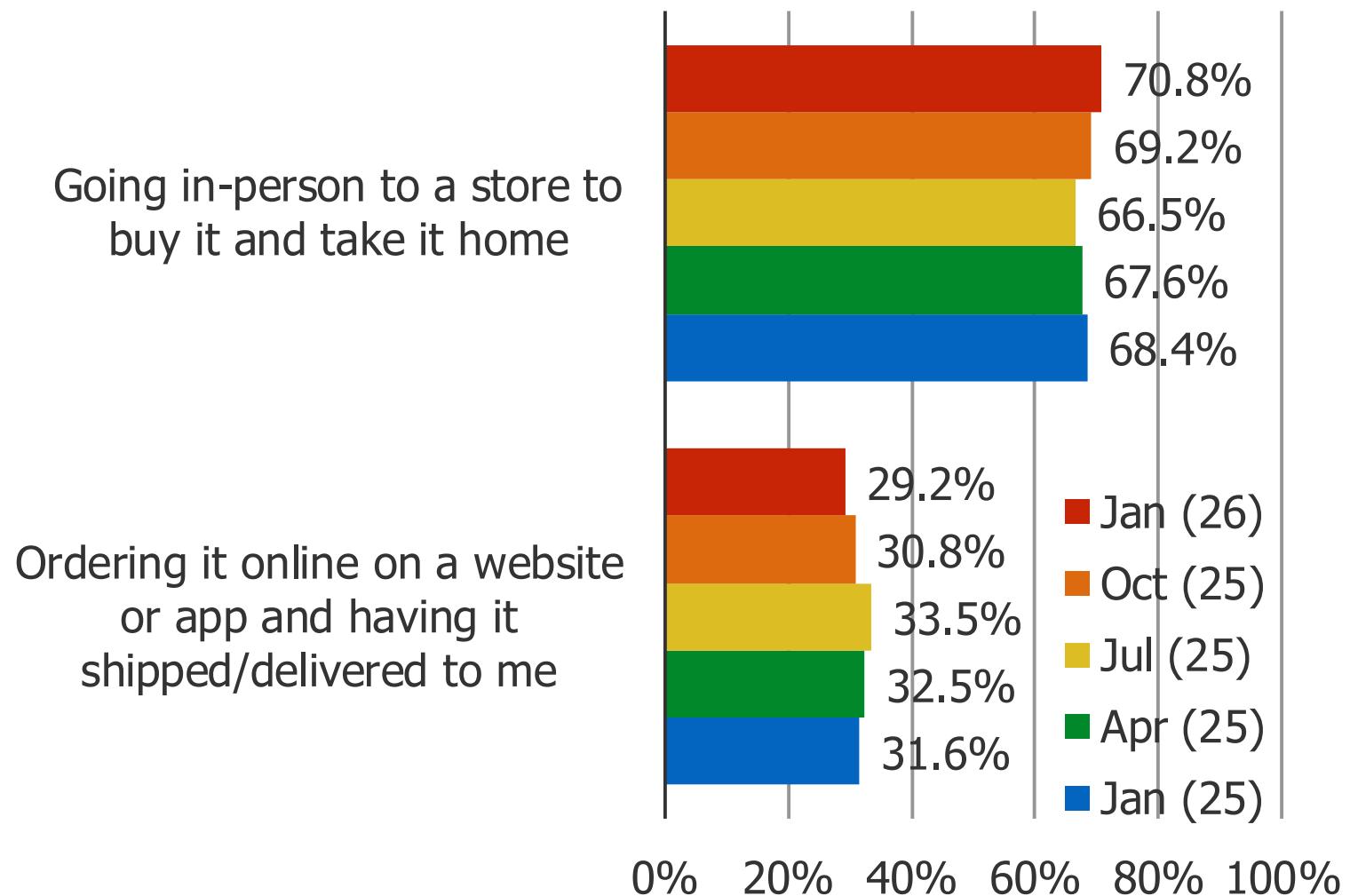
Consumer Electronics, Vol 52

1000+ Respondents Per Quarter

IPHONE DYNAMICS

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

This question was posed to all respondents.

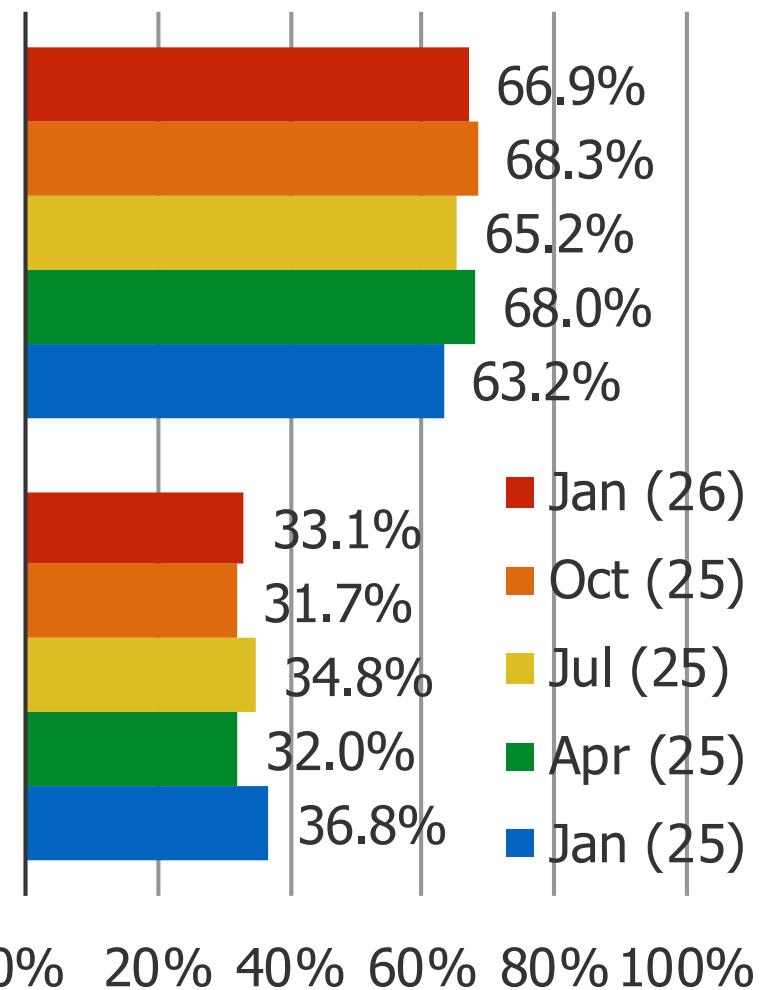


THINKING ABOUT THE SMARTPHONE YOU CURRENTLY OWN, HOW DID YOU GET IT?

This question was posed to all respondents.

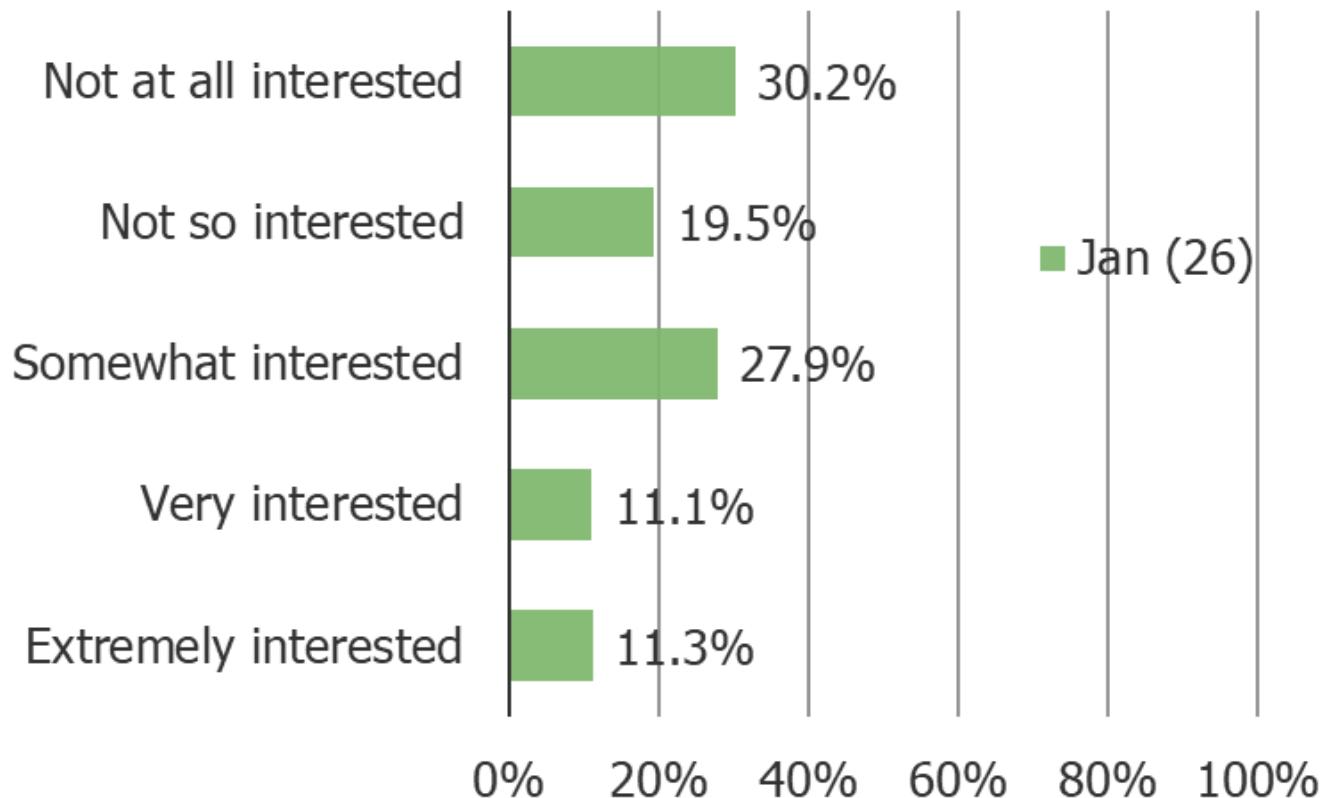
In-person (I went to a physical store location and bought it)

Online (ordered on a website or app and had it delivered to me)



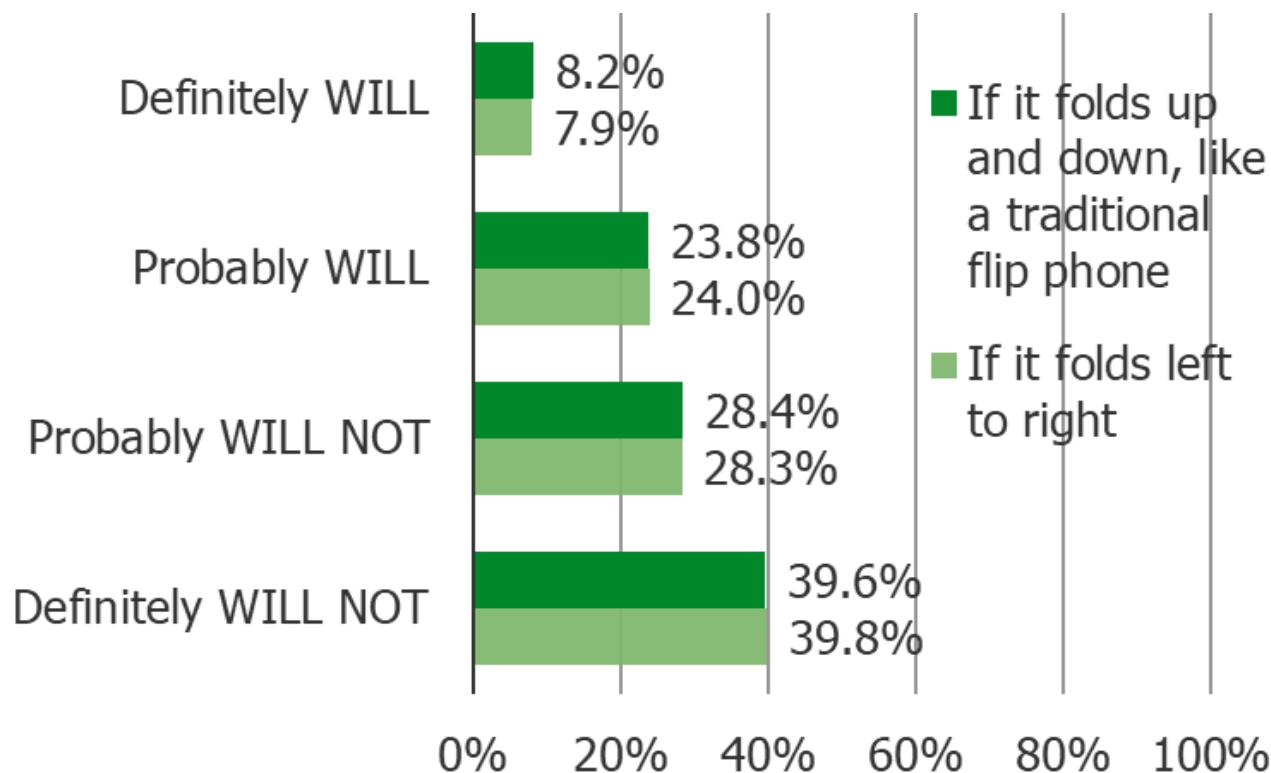
HOW MUCH INTEREST WOULD YOU HAVE IN A FOLDABLE IPHONE? (ONE THAT FOLDS LIKE A TRADITIONAL FLIP PHONE TO A SMALLER FORM FACTOR, BUT THEN FLIPS OPEN TO THE SIZE OF A NORMAL IPHONE OR LARGER).

This question was posed to current iOS users.



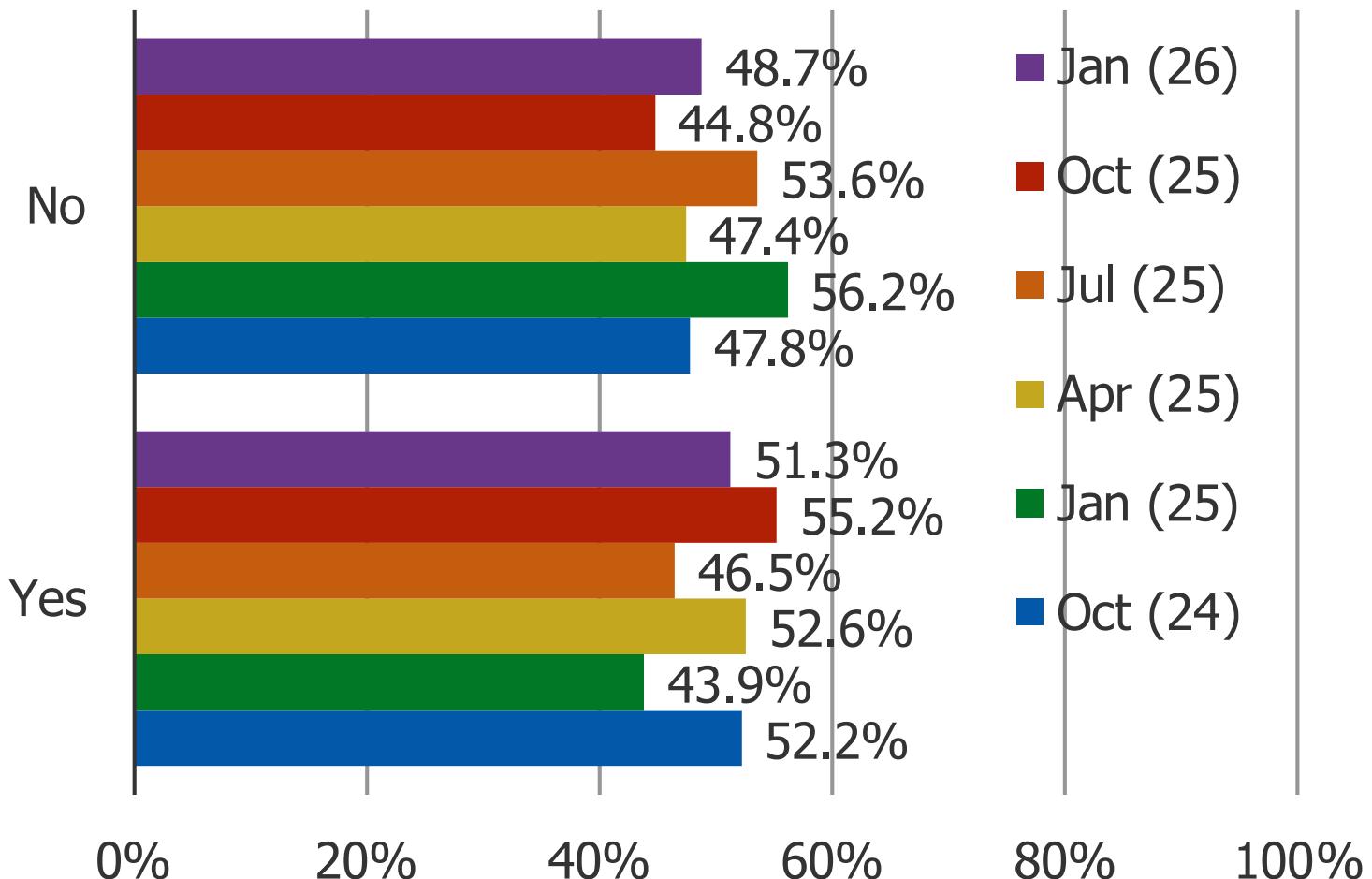
IF APPLE RELEASES A FOLDABLE IPHONE IN 2025 OR 2026, HOW LIKELY WOULD YOU BE TO GET IT?

This question was posed to current iOS users.



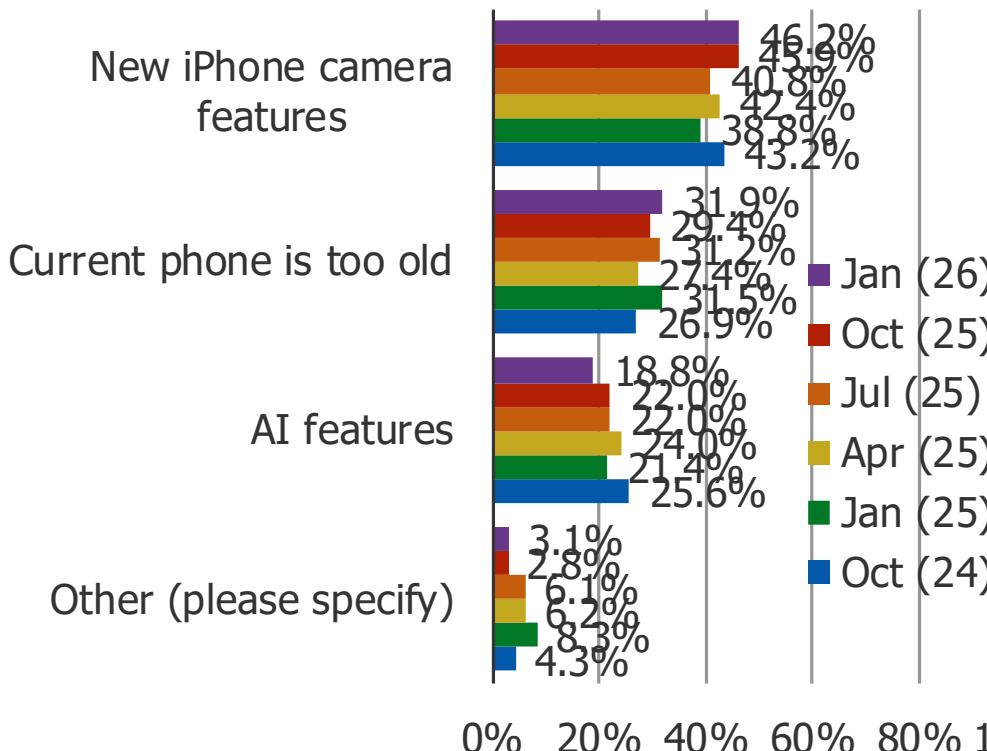
ARE YOU CURRENTLY CONSIDERING UPGRADING YOUR IPHONE TO A NEW/DIFFERENT MODEL THAN WHAT YOU HAVE NOW?

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

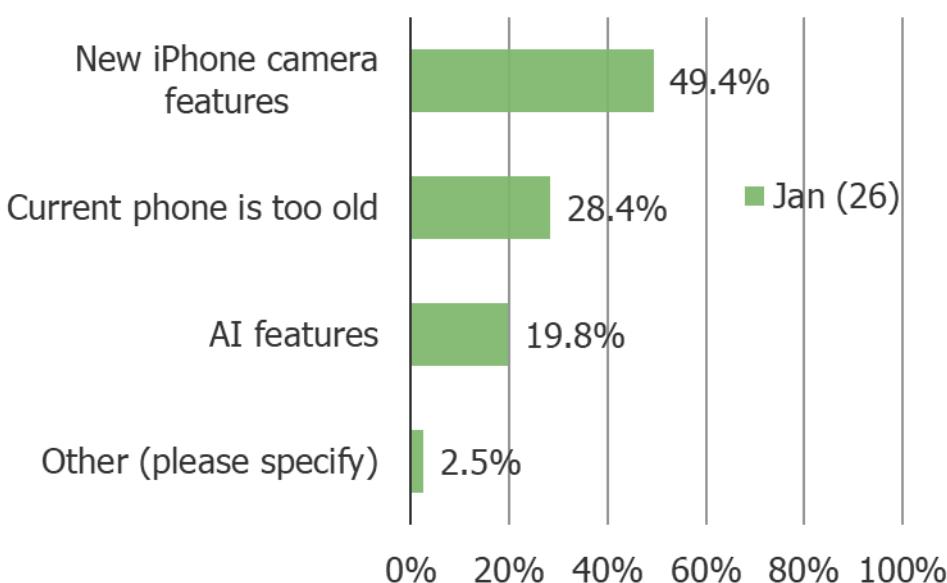


YOU MENTIONED THAT YOU ARE AT LEAST SOMEWHAT INTERESTED IN ONE OF THE NEWEST IPHONES JUST RELEASED. WHAT MAKES YOU MOST INTERESTED IN THE NEW PHONE(S)?

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

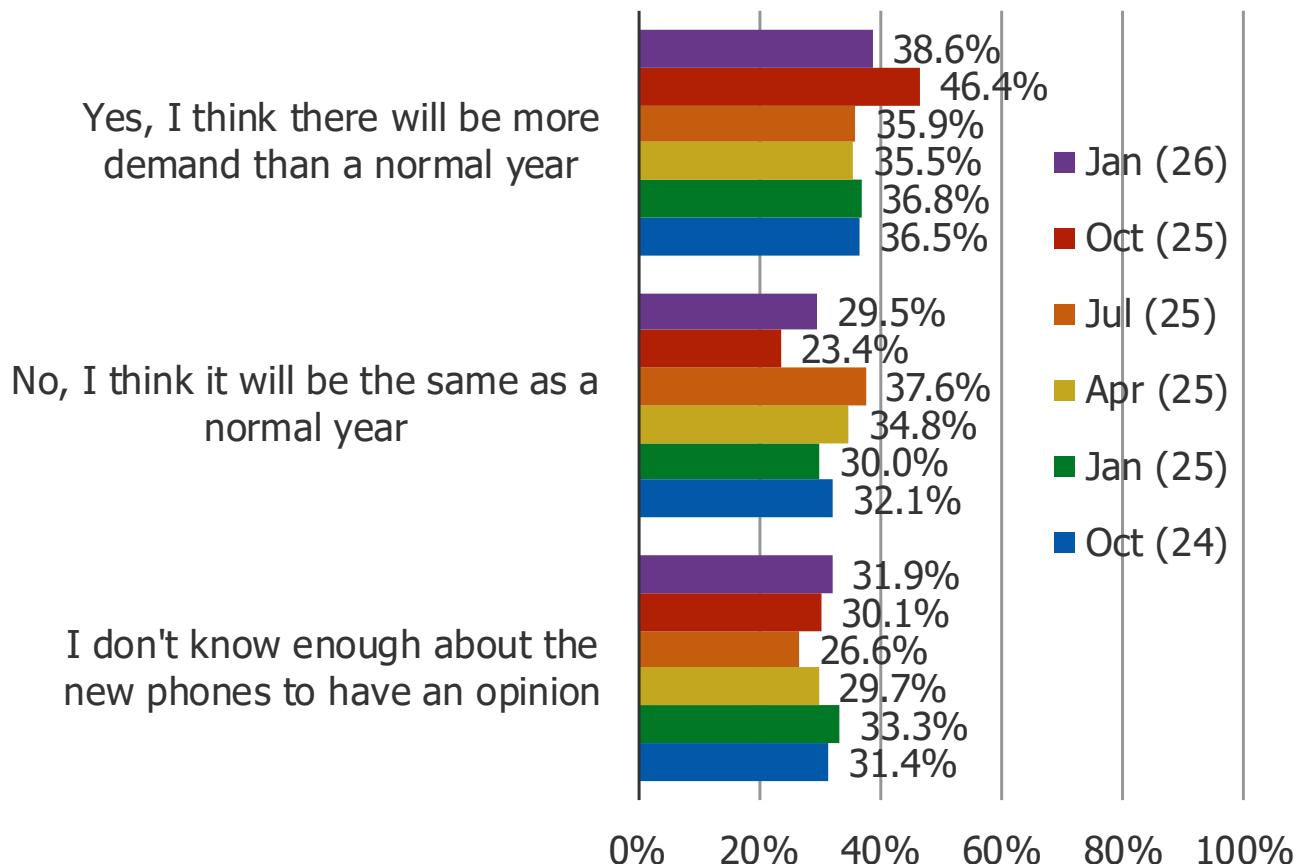


Focusing on iOS users who said they are extremely interested in one of the newest iPhones.



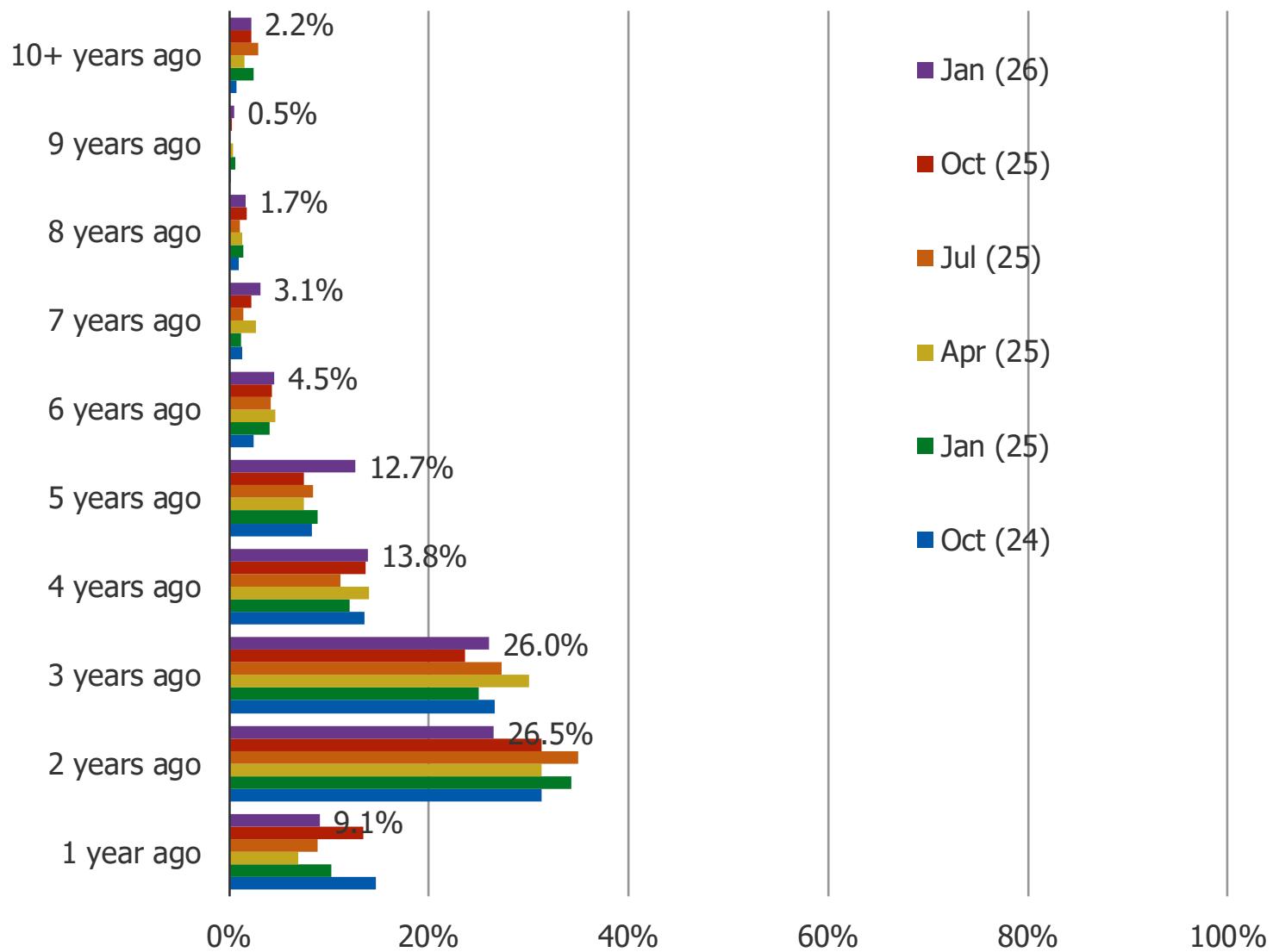
IN YOUR VIEW, DO YOU THINK THE NEWEST IPHONES HAVE CHARACTERISTICS OR FEATURES ABOUT THEM THAT WILL CAUSE MORE IPHONE OWNERS TO UPGRADE COMPARED TO A TYPICAL YEAR WHEN NEW IPHONES ARE RELEASED?

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



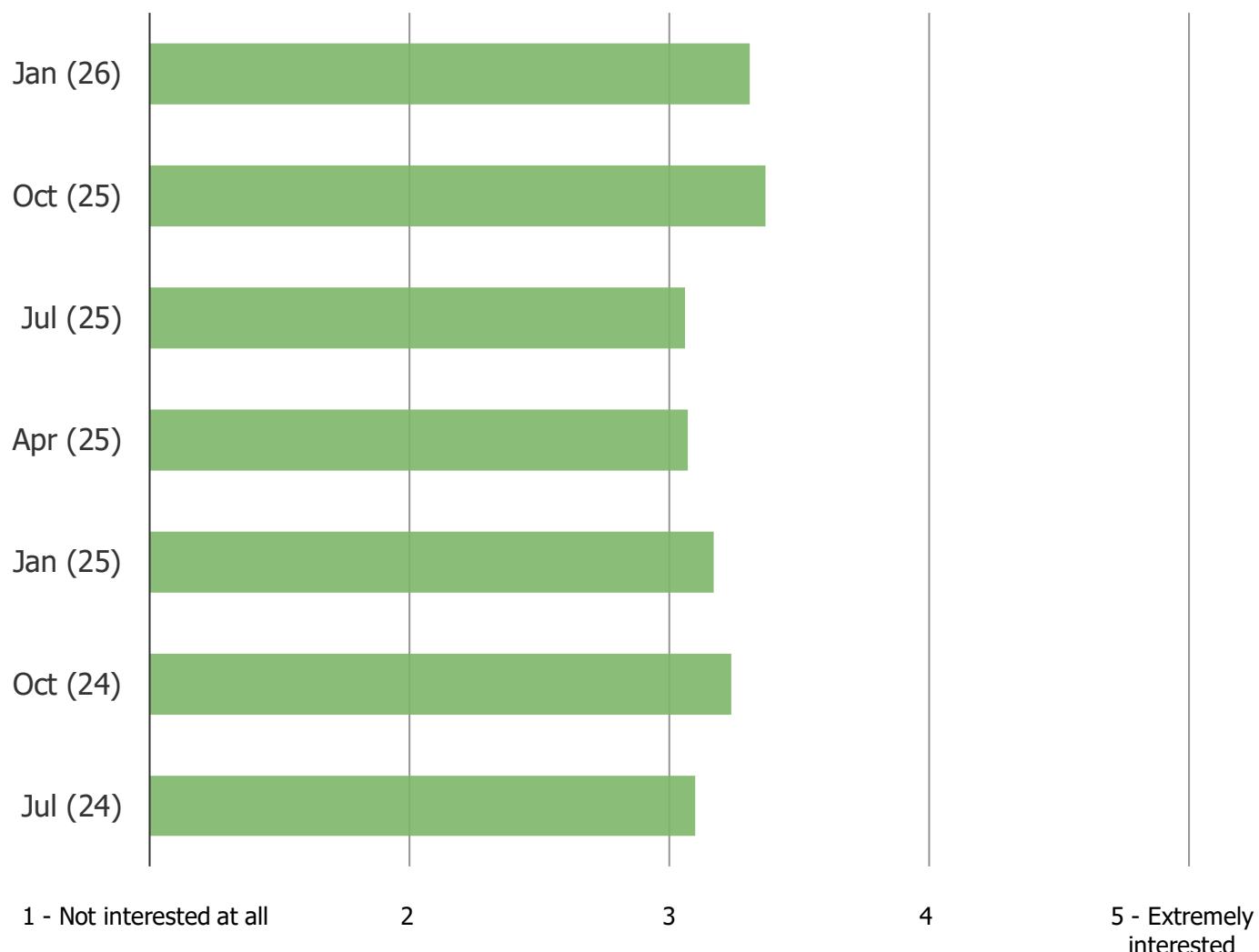
YOU MENTIONED THAT YOU GOT YOUR SMARTPHONE MORE THAN A YEAR AGO. HOW MANY YEARS AGO DID YOU GET YOUR CURRENT SMARTPHONE?

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



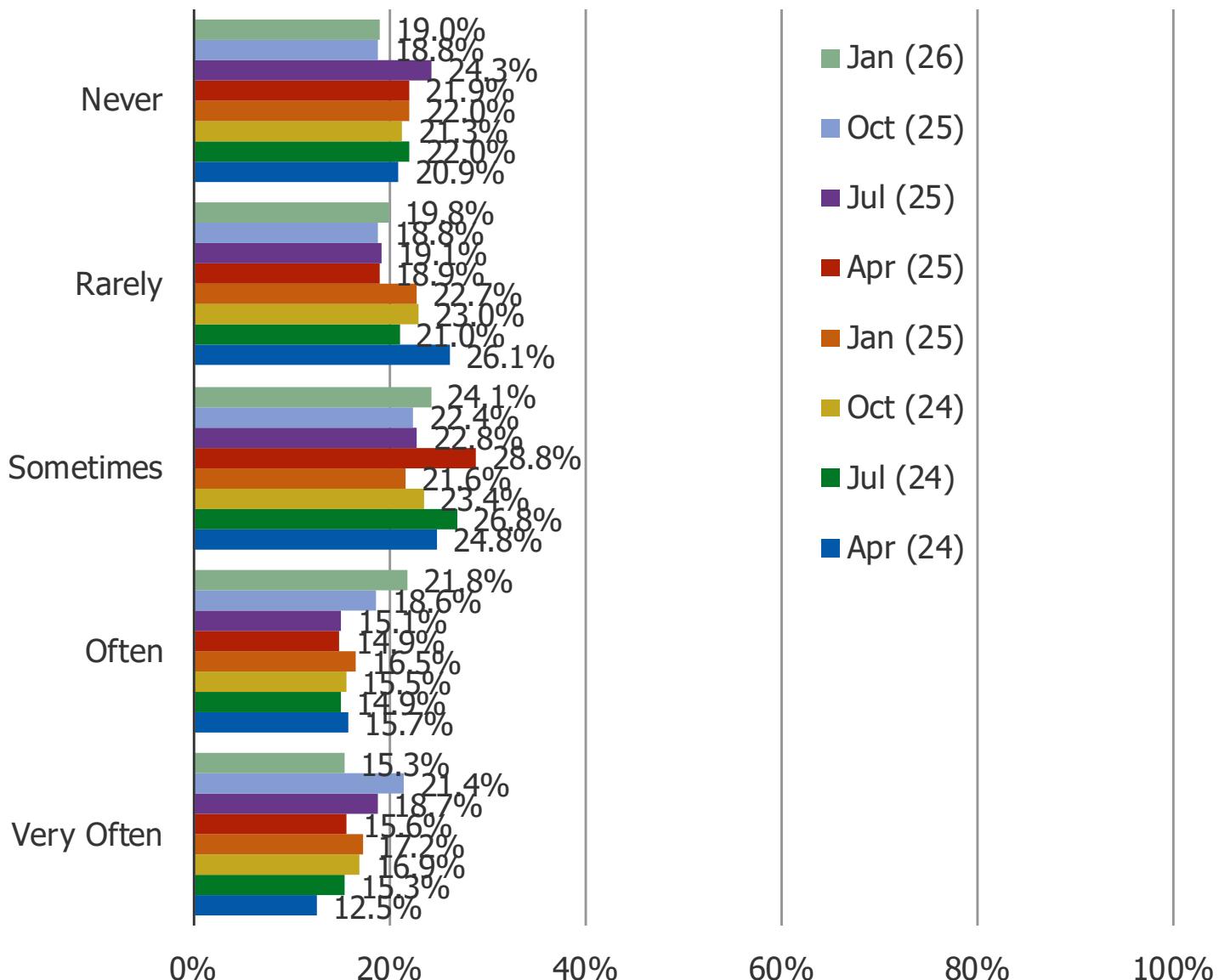
APPLE INTELLIGENCE WILL ENCOMPASS A SUITE OF AI AND MACHINE LEARNING FEATURES INTEGRATED ACROSS APPLE'S ECOSYSTEM, ENHANCING PERSONALIZED RECOMMENDATIONS, HEALTH AND FITNESS TRACKING, SIRI CAPABILITIES, IMAGE CREATION, WRITING TOOLS, AND PRIVACY MEASURES TO PROVIDE A MORE INTUITIVE, SECURE, AND CUSTOMIZED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



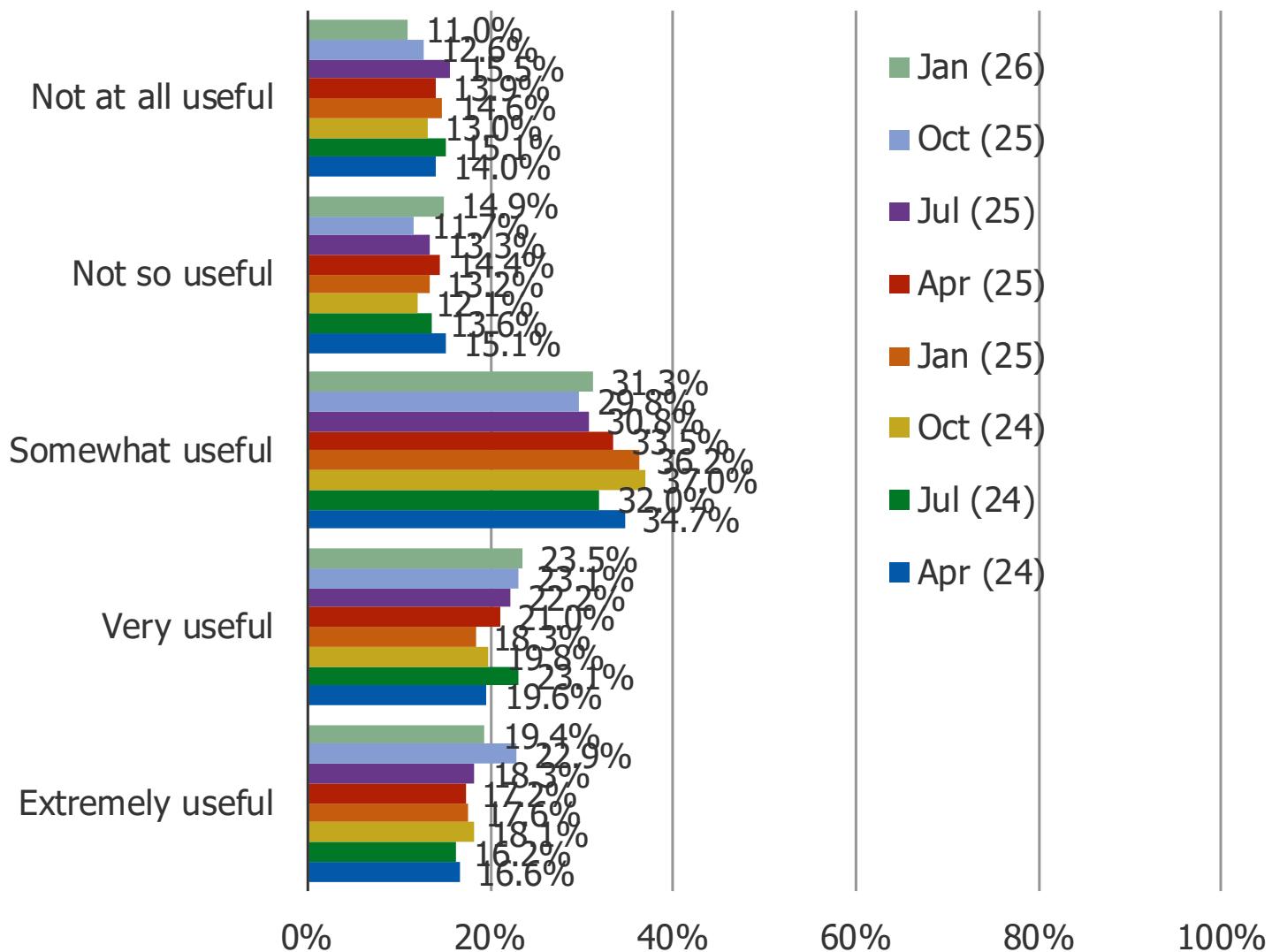
HOW OFTEN DO YOU USE SIRI ON YOUR IPHONE NOW?

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.



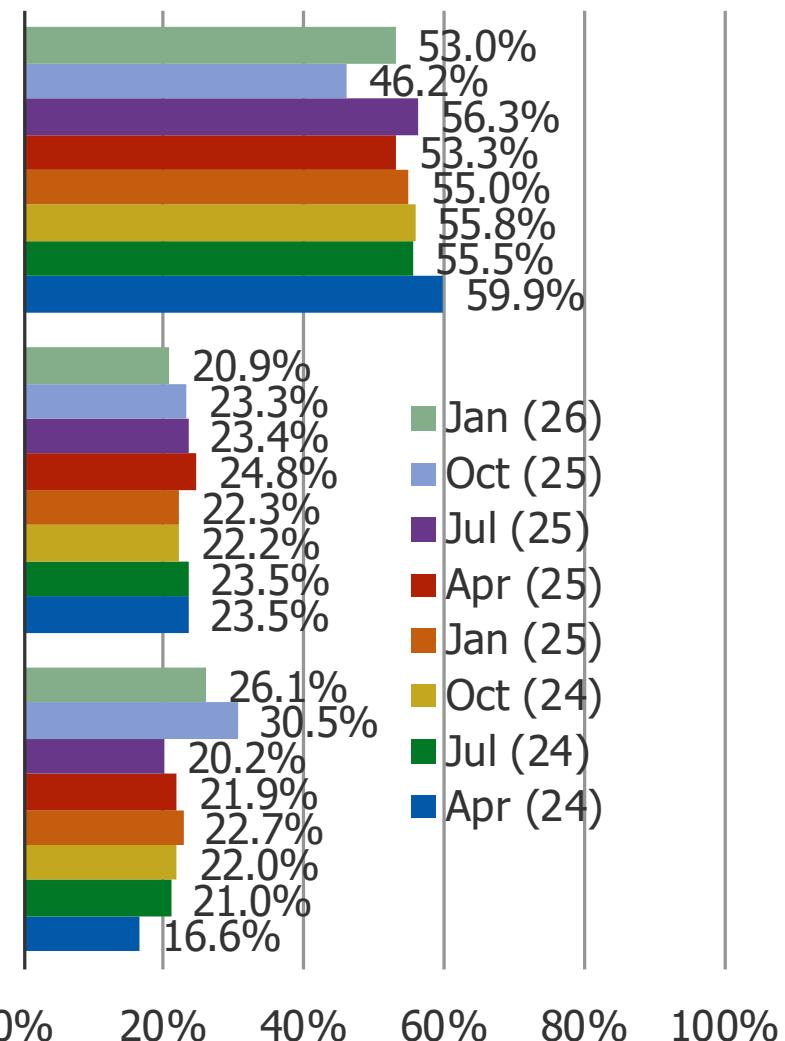
WOULD YOU CHANGE YOUR USAGE OF SIRI IF SIRI WAS ENHANCED BY AI (ARTIFICIAL INTELLIGENCE)

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

No, it wouldn't change my usage

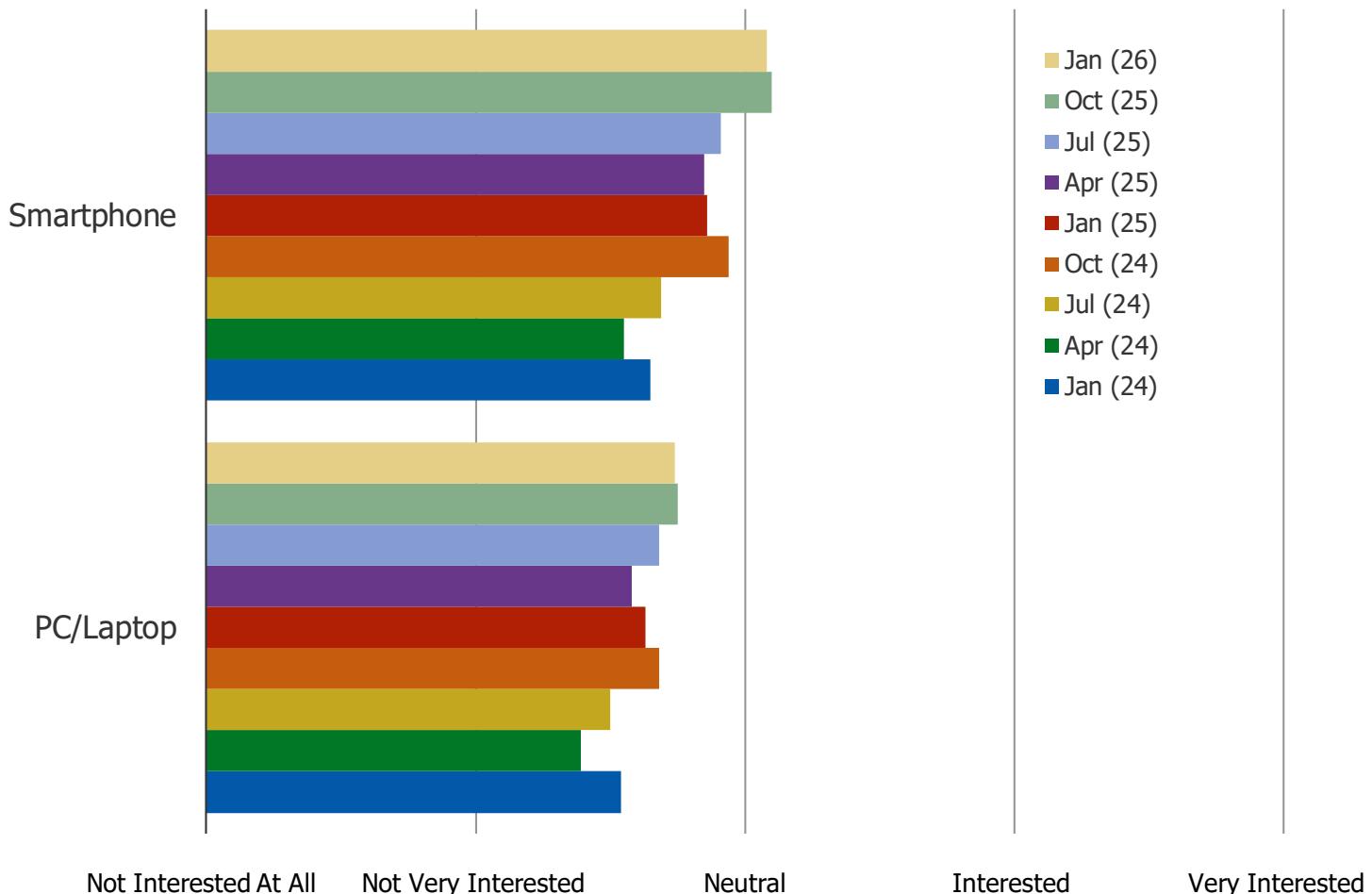
Yes, I would use it a little more

Yes, I would use it a lot more



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.



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

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

Quarterly evolution table (% of fill-ins)

2024 Q3 → 2026 Q1

Category	2024 Q3	2024 Q4	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2026 Q1
Other / unclear	44.9%	43.5%	43.7%	43.8%	43.3%	42.8%	42.9%
Ease of use / convenience	11.9%	11.9%	11.1%	10.4%	11.4%	11.4%	9.7%
Quality / reliability	11.5%	10.9%	8.6%	9.8%	10.6%	10.5%	12.1%
Used to it / familiarity	9.0%	7.7%	9.2%	11.2%	8.7%	9.9%	11.0%
Brand preference / like iPhone	5.3%	4.8%	4.9%	4.8%	5.3%	5.1%	5.8%
Prefer iOS / OS	5.0%	5.1%	6.5%	4.6%	5.2%	5.2%	4.3%
Apple ecosystem / integration	4.0%	4.6%	3.5%	3.6%	3.8%	3.4%	3.2%
Features (general)	1.9%	3.7%	3.3%	3.6%	3.5%	4.5%	3.2%
Non-substantive / don't know	2.1%	2.0%	2.7%	2.7%	2.0%	1.6%	1.9%
Work / standardization	2.2%	2.3%	1.9%	1.2%	1.6%	1.7%	2.8%
Camera / photos	0.6%	1.9%	1.9%	1.6%	1.7%	1.7%	1.7%
Security / privacy	0.4%	0.7%	1.0%	1.2%	1.0%	0.9%	0.9%

Key insights (data-only)

- The top explicit reasons for choosing iPhone are now much clearer:
 - Ease of use / convenience (~10–12%)
 - Quality / reliability (~9–12%)
 - Familiarity / habit (~8–11%)
- When people say "I like it / it's better," those mostly ladder into quality/reliability + general preference.
- "Apple ecosystem/integration" remains present (~3–5%), but it's not the dominant story in the way people describe their choice.
- "Price/value" is rare in iPhone-choice justifications (~0.5% overall).
- Even after improving categorization, ~43% remains genuinely vague, which seems to reflect real respondent behavior (short / non-explanatory answers) rather than a coding gap.

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.

Quarterly evolution table (% of fill-ins)

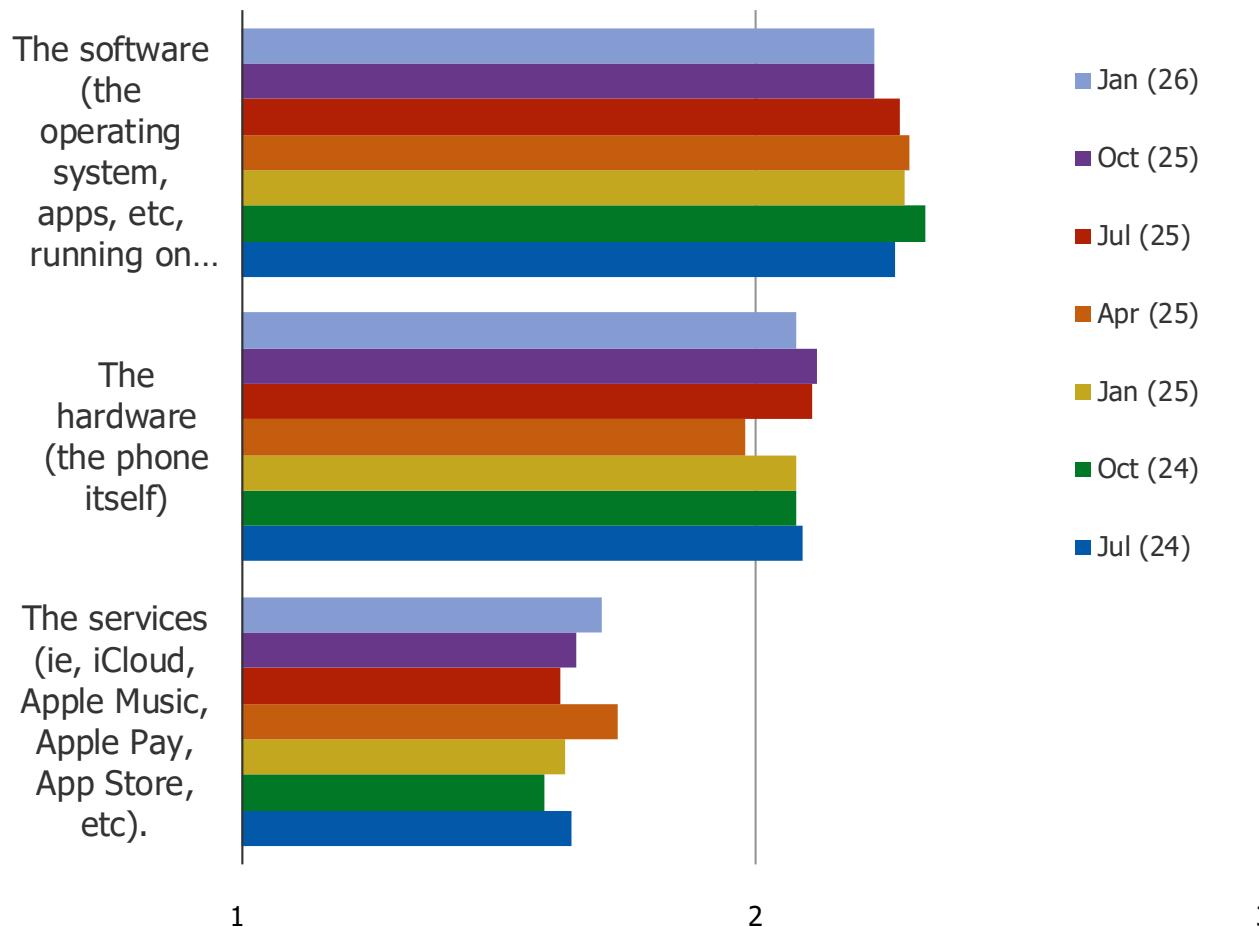
Category	2024 Q3	2024 Q4	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2026 Q1
Old/broken phone / performance issues	32.9%	33.9%	31.3%	34.4%	31.6%	31.4%	32.8%
Other / unclear	26.3%	22.4%	27.3%	21.2%	24.4%	19.1%	21.4%
Upgrade cycle / time to upgrade	11.2%	11.7%	8.5%	11.5%	10.3%	10.0%	15.3%
Want the latest / new tech	9.7%	11.6%	10.3%	8.9%	10.3%	11.3%	9.5%
Camera upgrade	4.5%	6.0%	5.9%	5.4%	5.7%	5.4%	3.7%
Better performance / quality	2.4%	2.9%	2.6%	3.3%	3.0%	3.7%	4.3%
Work / required	2.7%	2.8%	1.7%	2.8%	2.1%	2.4%	1.7%
Need more storage	1.2%	1.8%	1.2%	1.4%	2.0%	1.8%	1.9%
Brand preference	2.1%	1.5%	2.2%	1.4%	2.0%	2.1%	2.6%
Want better/new features	1.9%	3.7%	3.3%	3.6%	3.5%	4.5%	1.5%

Trend stats (Quarterly R² + p-value)

Category	R ²	p-value	Interpretation
Other / unclear	0.596	0.0419	Statistically significant decline (coding + clearer reasons showing up)
Work / required	0.614	0.0370	Statistically significant decline
Old/broken phone / performance issues	0.164	0.367	No clear trend
Want the latest / new tech	0.182	0.349	No clear trend
Upgrade cycle / time to upgrade	0.015	0.790	No clear trend

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

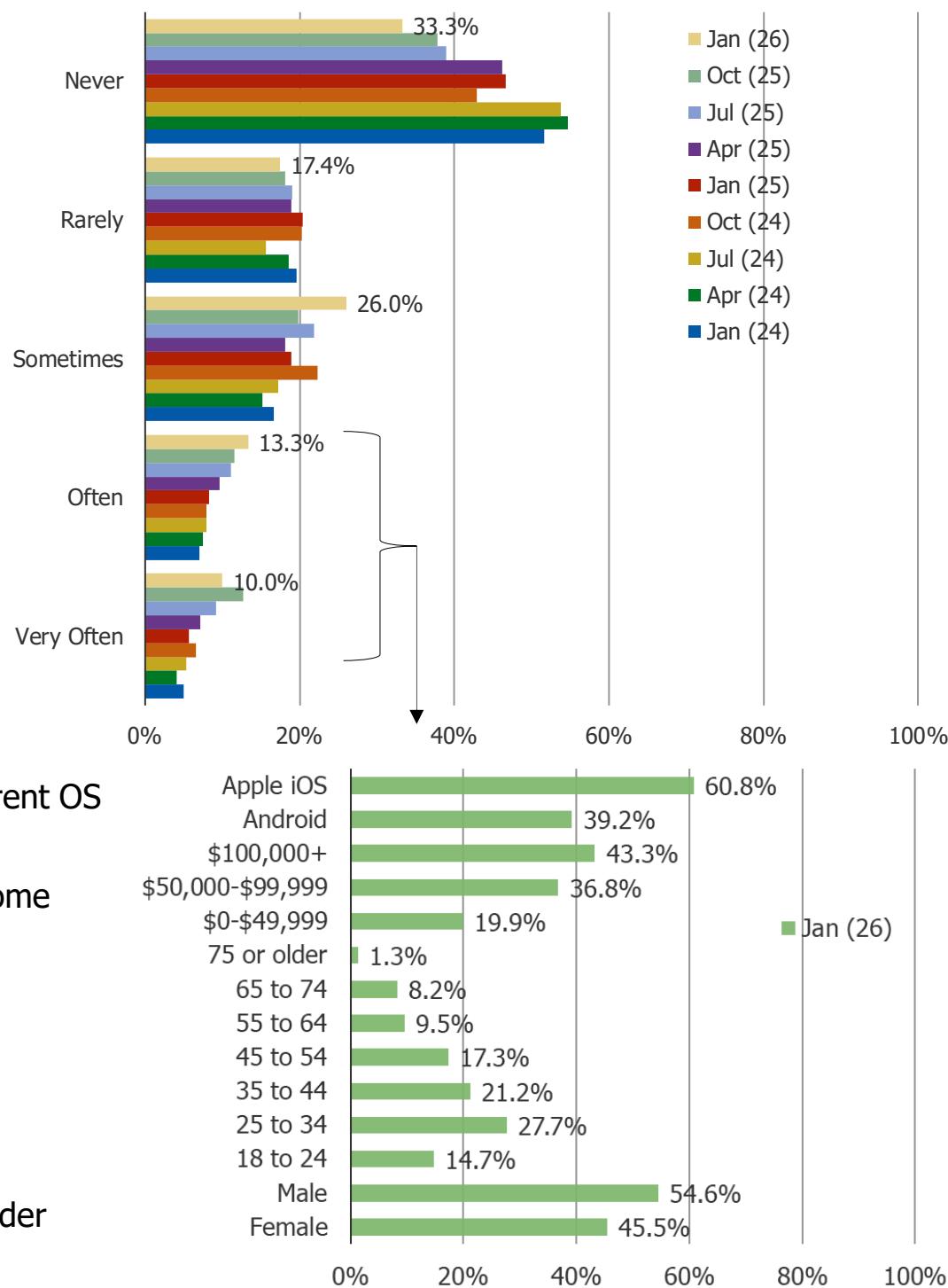
This question was posed to all respondents who are iOS users.



AI CHATBOTS

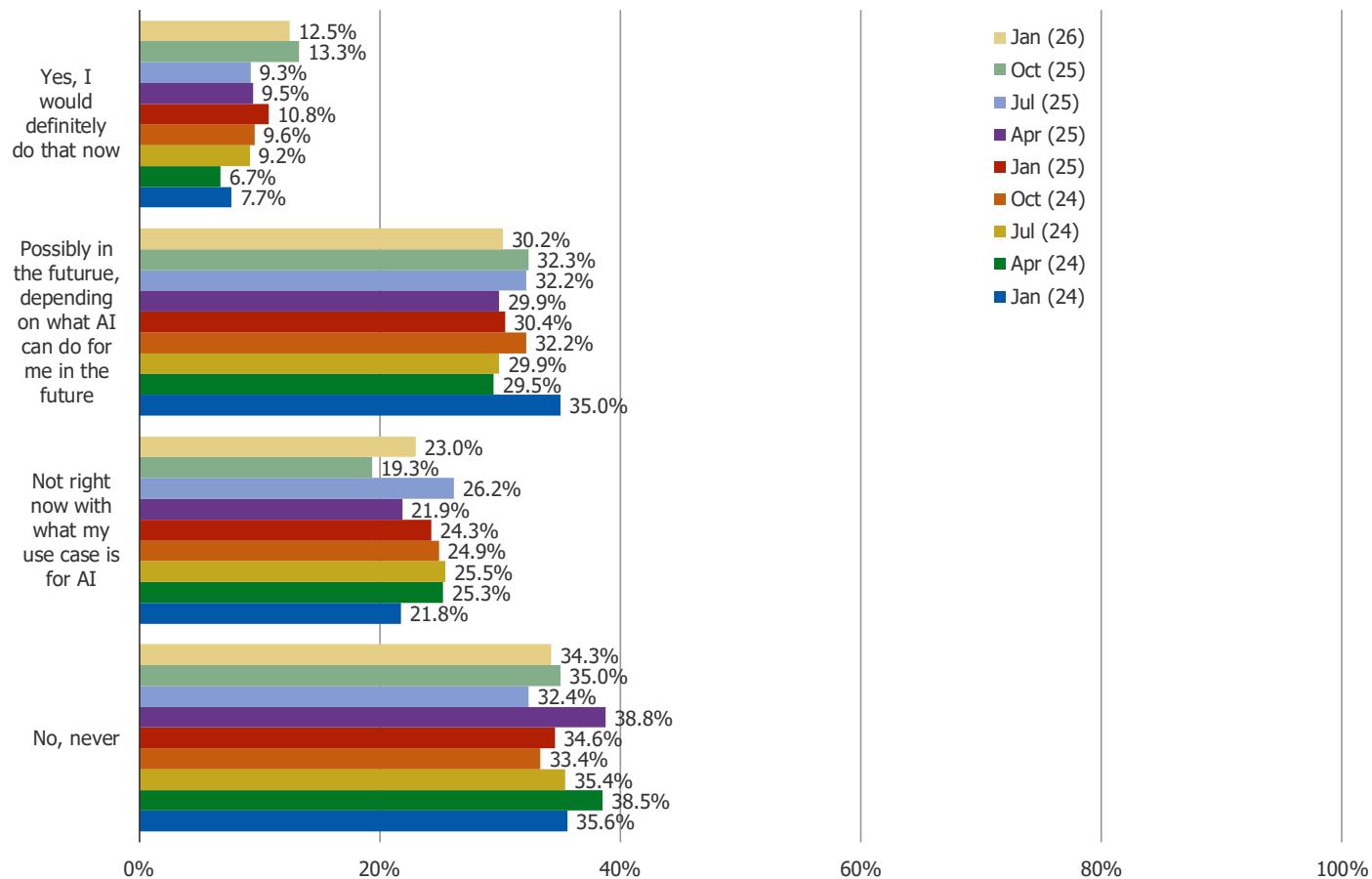
HOW OFTEN DO YOU USE AI CHATBOTS LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, OR OTHERS IN YOUR LIFE?

This question was posed to all respondents.



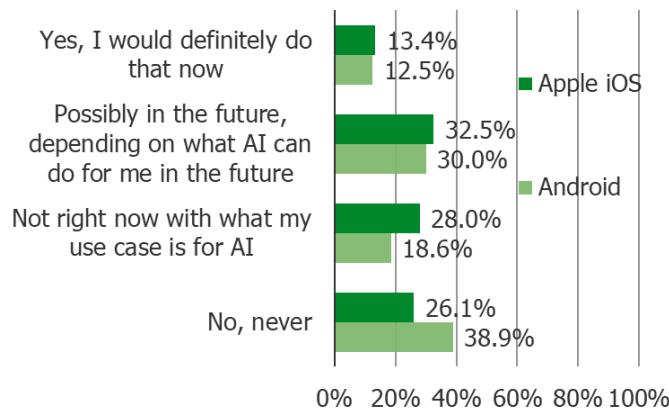
COULD YOU EVER SEE YOURSELF GOING OUT AND BUYING A NEW SMARTPHONE OR LAPTOP IF THOSE DEVICES WERE ABLE TO WORK BETTER WITH AI RELATED APPS THAN THE EXISTING ONES YOU OWN?

This question was posed to all respondents.

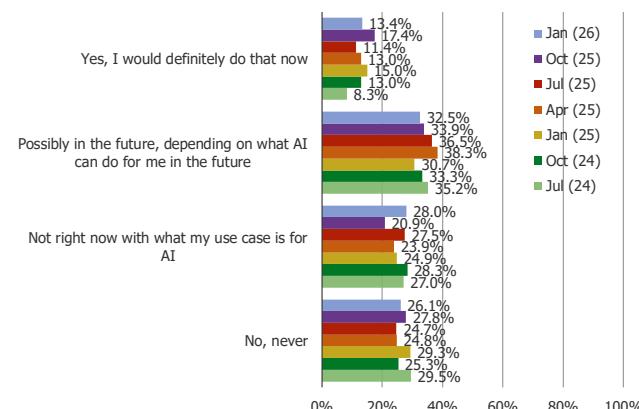


Cross-Tabbing The Above Data:

Apple vs. Android Users (January 26 Data)

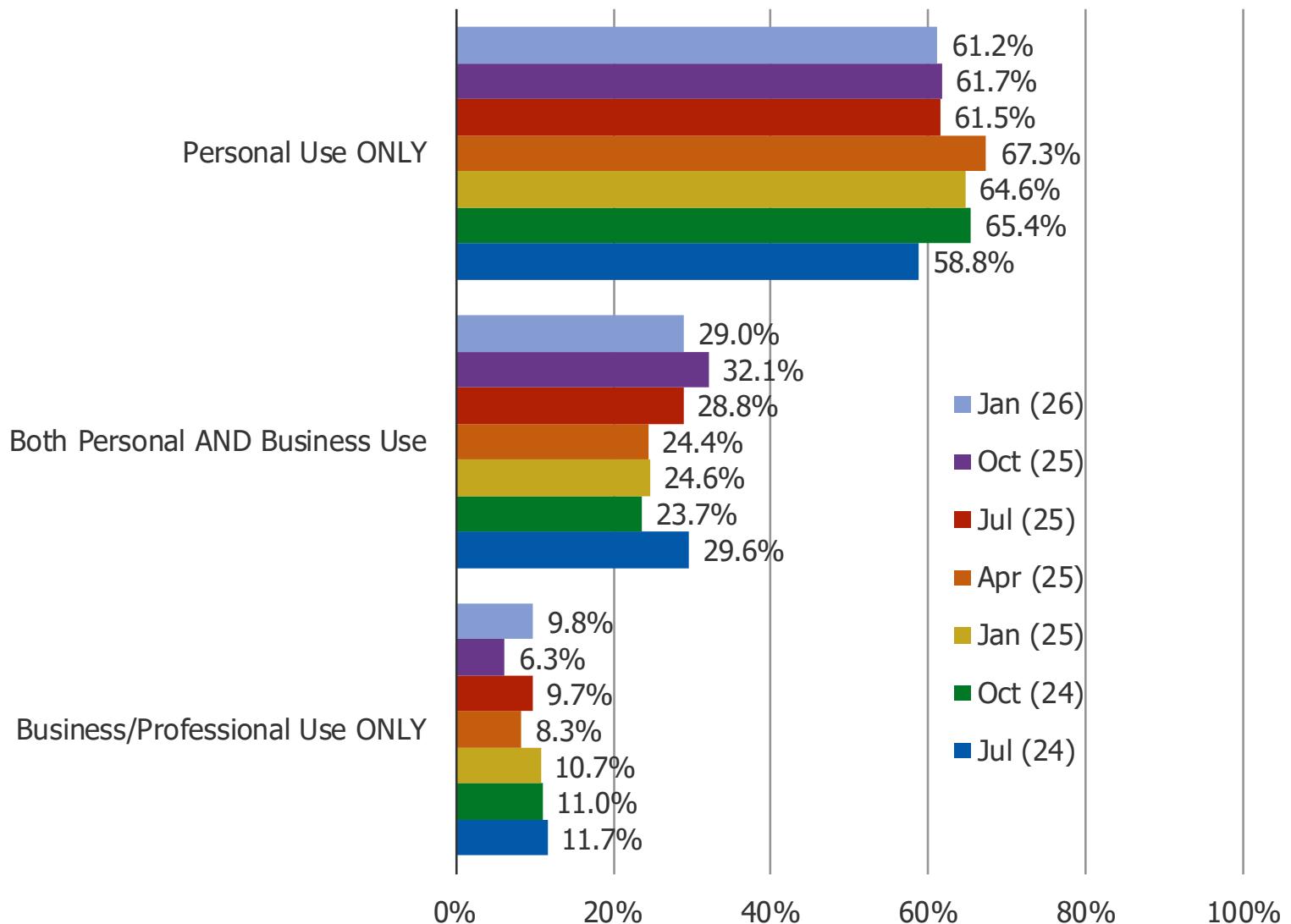


iOS Users (Time Series)



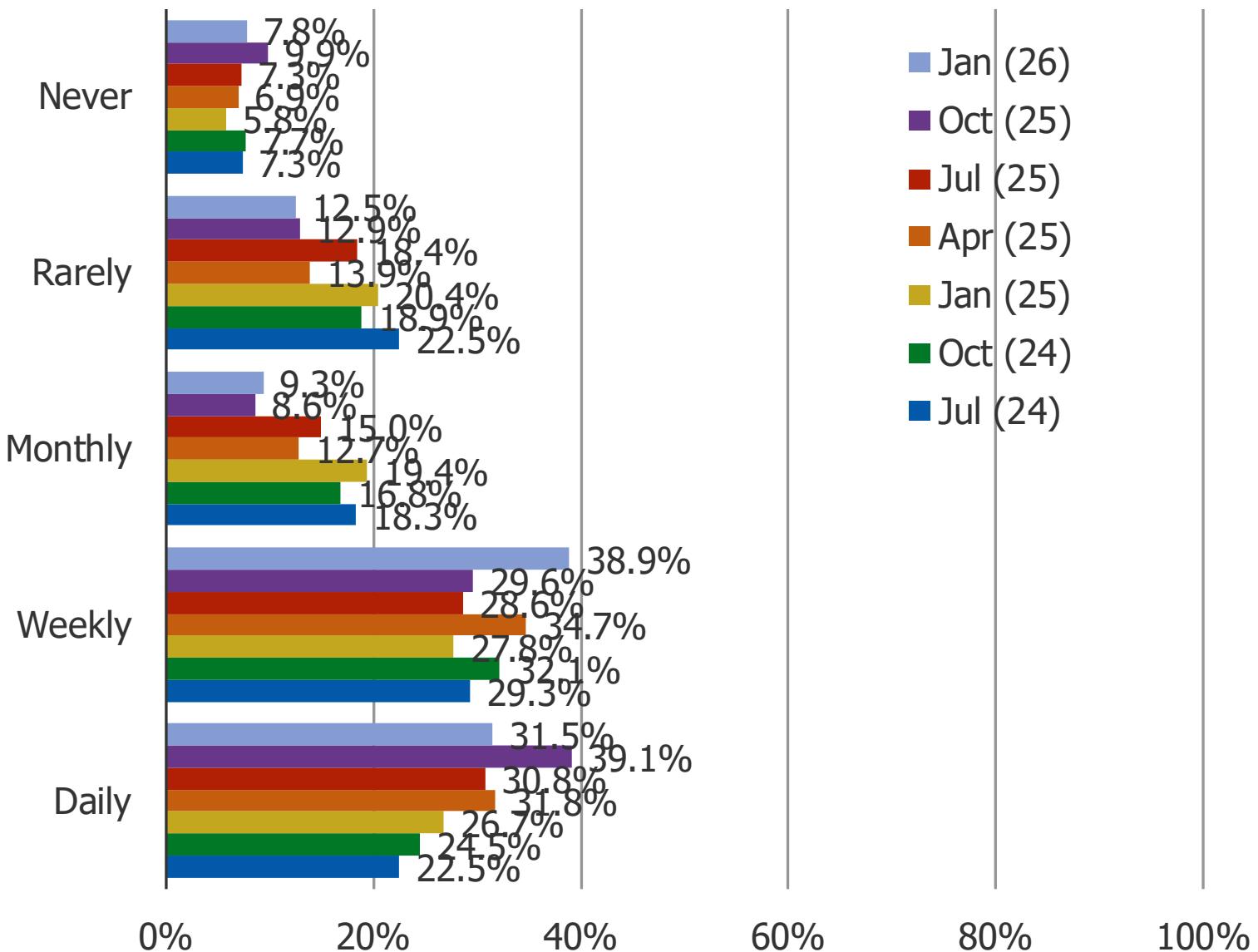
WHAT DO YOU USE AI CHATBOTS (LIKE CHATGPT, BARD, MICROSOFT COPILOT, GROK, ETC) FOR?

This question was posed to respondents who use AI chatbots more than never (N = 590)



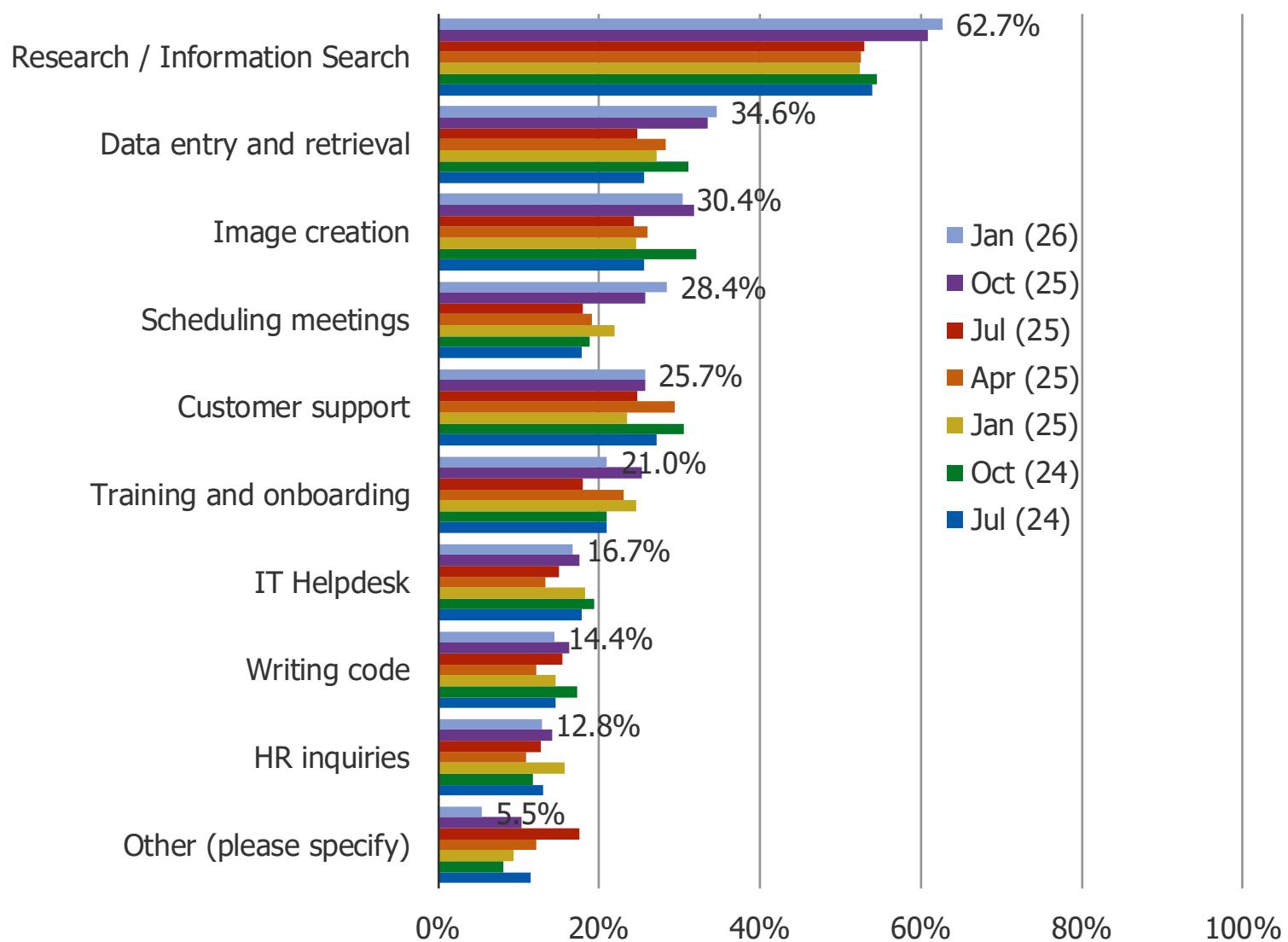
HOW FREQUENTLY DO YOU USE AI CHATBOTS AT WORK?

This question was posed to all respondents who use AI chatbots for work (N = 257)



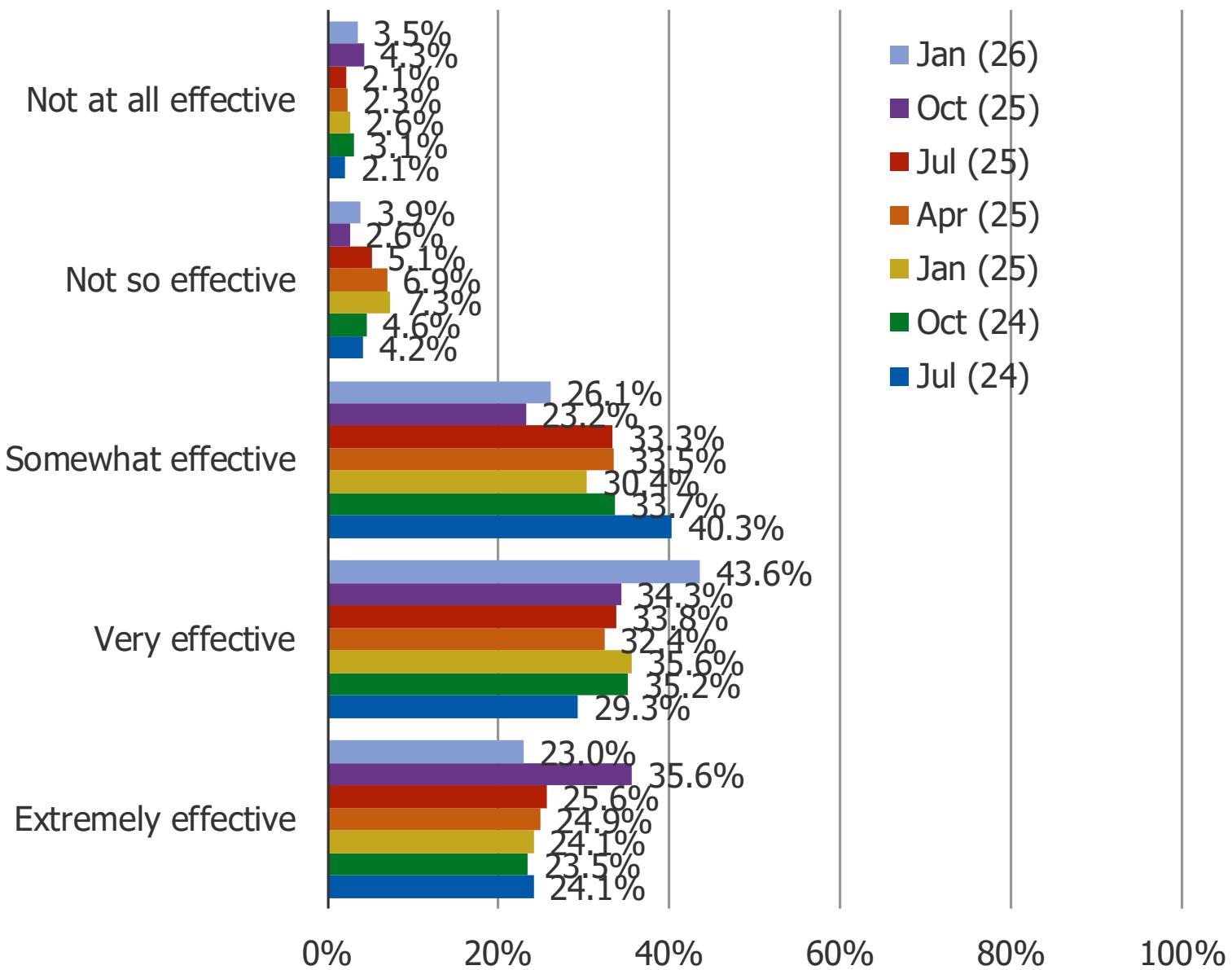
FOR WHICH TASKS DO YOU USE AI CHATBOTS AT WORK? SELECT ALL THAT APPLY

This question was posed to all respondents who use AI chatbots for work (N = 257)



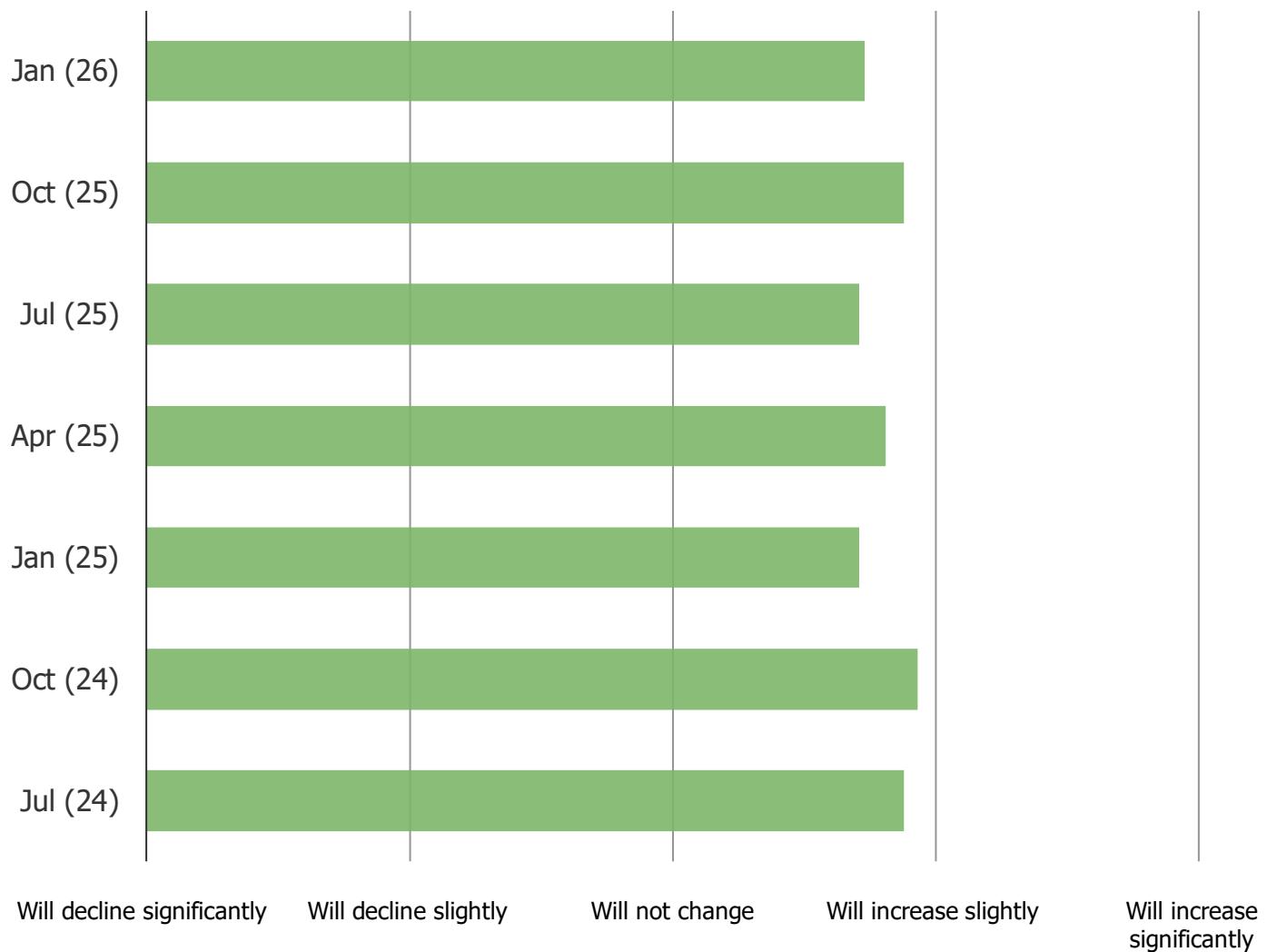
HOW EFFECTIVE ARE AI CHATBOTS IN COMPLETING THE TASKS YOU USE THEM FOR?

This question was posed to all respondents who use AI chatbots for work (N = 257)



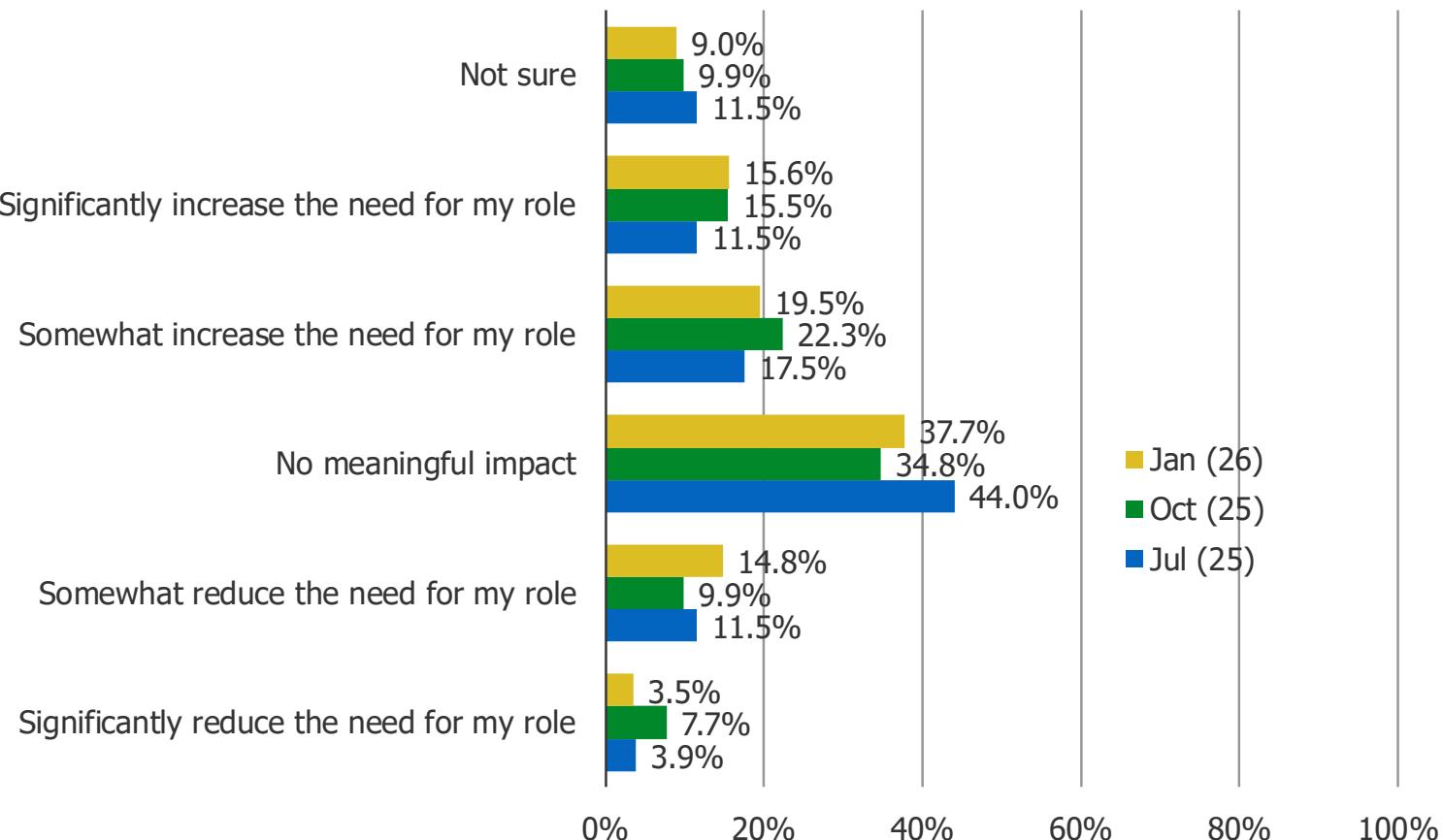
DO YOU EXPECT HOW OFTEN YOU USE AI CHATBOTS AT WORK TO CHANGE GOING FORWARD?

This question was posed to all respondents who use AI chatbots for work (N = 257)



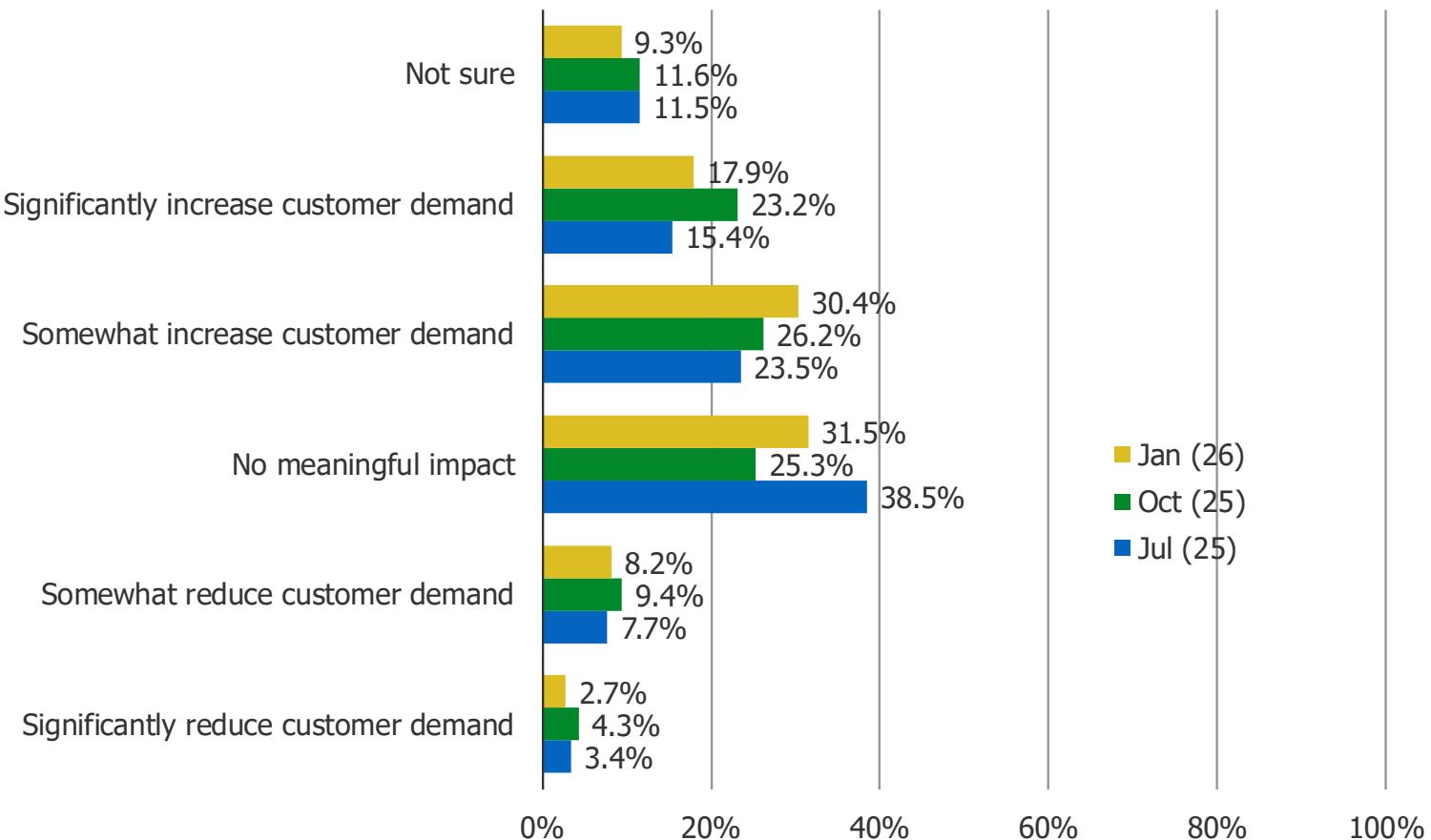
HOW DO YOU EXPECT AI TO IMPACT YOUR COMPANY'S NEED FOR YOUR ROLE IN THE NEXT 2–3 YEARS?

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



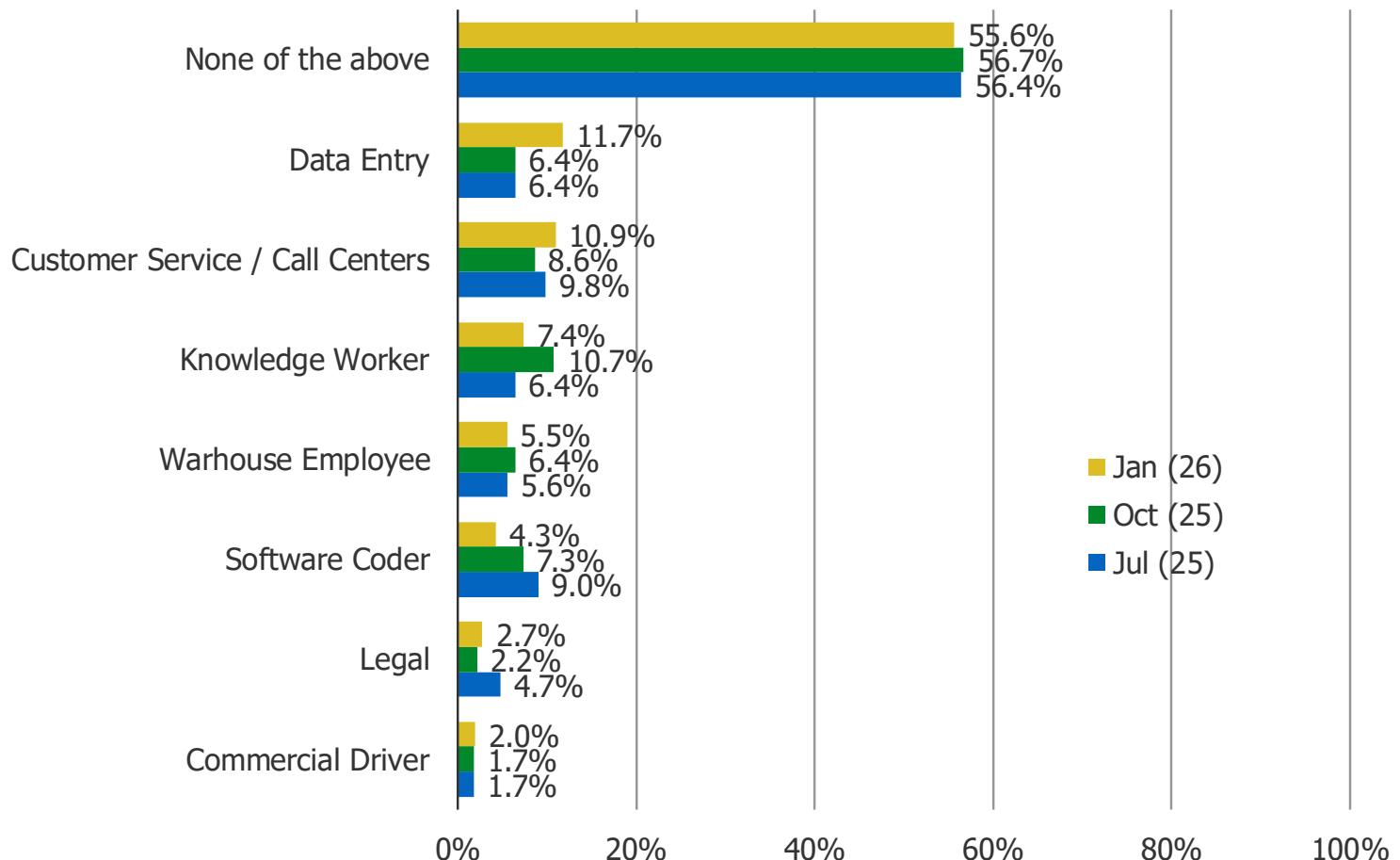
HOW DO YOU EXPECT AI TO IMPACT DEMAND FROM YOUR COMPANY'S CUSTOMERS IN THE NEXT 2-3 YEARS?

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.



What do you use AI chatbots for?

Quarterly evolution table (% of fill-ins)

Category	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2026 Q1
Other / unclear	42.1%	43.2%	43.6%	42.3%	38.3%	36.2%	38.2%	33.0%
Information / Q&A / learning	22.8%	22.7%	23.9%	24.2%	26.0%	28.3%	31.1%	33.1%
Work help / productivity	6.4%	6.8%	7.4%	7.6%	6.5%	8.5%	8.6%	8.3%
Non-substantive / don't know	7.2%	6.3%	6.6%	6.6%	6.7%	5.2%	4.4%	5.4%
Writing / editing	5.3%	5.4%	5.2%	5.2%	5.6%	4.8%	4.0%	4.1%
School / homework	5.6%	5.4%	5.3%	5.3%	6.1%	5.5%	3.6%	3.3%
Brainstorming / ideas	3.1%	3.1%	3.0%	3.0%	2.9%	3.7%	3.3%	3.0%
Entertainment / fun	1.8%	1.9%	1.8%	1.8%	1.9%	1.7%	1.1%	1.2%
Images / creative	1.9%	1.7%	1.9%	1.9%	1.9%	2.6%	2.3%	3.0%
Shopping / product help	0.9%	0.9%	0.8%	0.8%	1.0%	0.8%	1.0%	1.7%
Recipes / cooking	0.6%	0.6%	0.6%	0.6%	0.6%	0.8%	0.6%	0.9%
Coding / technical	0.5%	0.6%	0.8%	0.9%	0.6%	0.3%	0.3%	0.3%

Trend stats (Quarterly R² + p-value)

Category	R ²	p-value	Interpretation
Information / Q&A / learning	0.922	0.000039	Statistically significant increase
Other / unclear	0.748	0.00263	Statistically significant decline
Work help / productivity	0.513	0.0301	Statistically significant increase
Writing / editing	0.568	0.0190	Statistically significant decline
Entertainment / fun	0.834	0.000587	Statistically significant decline
Shopping / product help	0.449	0.0483	Statistically significant increase (small base)
Recipes / cooking	0.555	0.0212	Statistically significant increase (small base)
Coding / technical	0.449	0.0482	Statistically significant decline (small base)

What do you use AI chatbots for?

Key insights (data-only)

- The clearest structural shift is toward **Information / Q&A / learning**, rising steadily to 33.1% in 2026 Q1 (very strong trend fit + significance).
- **Other / unclear** compresses meaningfully over time (from ~43–44% down to 33% in 2026 Q1), suggesting respondents increasingly describe specific use cases rather than vague ones.
- **Work / productivity** use cases trend upward into the high single-digits (8.3% in 2026 Q1) and show statistical significance.
- **Writing / editing** shrinks over time (still meaningful, but now ~4% range).
- “**Fun/entertainment**” declines sharply and significantly (ending ~1.2% in 2026 Q1).
- Smaller emerging “**practical task**” use cases show upticks late:
 - **Shopping / product help** rises to 1.7% in 2026 Q1
 - **Images / creative** rises to 3.0% in 2026 Q1

Do you have any hopes or expectations for what AI chatbots or apps could bring to your smartphone and computer devices in the future?

Category mix (overall % of fill-ins)

Category	%
Other / unclear	49.9%
No expectations / none / no	39.5%
General help / assistance	3.1%
Smarter / improved AI	1.9%
Faster / more efficient	1.3%
More accurate / better answers	1.0%
Work / jobs impact	1.0%
Privacy / security	0.8%
Better integration into devices	0.8%
Automation / task completion	0.4%
Entertainment	0.3%
Personalization	0.2%

Do you have any hopes or expectations for what AI chatbots or apps could bring to your smartphone and computer devices in the future?

Quarterly evolution table (% of fill-ins)

Category	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2026 Q1
Other / unclear	48.2%	45.3%	51.3%	49.5%	49.5%	47.7%	51.2%	49.6%
No expectations / none / no	42.5%	44.3%	37.0%	40.8%	39.3%	41.6%	35.9%	35.5%
General help / assistance	3.1%	3.3%	2.9%	2.6%	3.0%	3.5%	3.7%	4.5%
Smarter / improved AI	1.9%	2.4%	1.7%	1.8%	1.9%	2.7%	2.9%	2.1%
Faster / more efficient	1.3%	1.0%	1.4%	1.3%	1.4%	1.6%	1.5%	1.3%
More accurate / better answers	0.7%	0.7%	0.8%	1.2%	1.0%	0.7%	1.3%	1.5%
Work / jobs impact	0.7%	0.6%	0.6%	0.8%	0.8%	0.9%	1.1%	2.0%
Privacy / security	0.6%	0.7%	0.6%	0.7%	0.7%	1.0%	0.5%	1.3%
Better integration into devices	0.9%	1.0%	0.7%	0.7%	0.9%	0.9%	0.7%	0.9%
Automation / task completion	0.5%	0.6%	0.4%	0.3%	0.4%	0.4%	0.5%	0.7%
Entertainment	0.3%	0.3%	0.3%	0.2%	0.3%	0.2%	0.5%	0.3%
Personalization	0.1%	0.2%	0.3%	0.1%	0.1%	0.2%	0.2%	0.2%

Trend stats (Quarterly R² + p-value)

Category	R ²	p-value	Interpretation
No expectations / none / no	0.686	0.00581	Statistically significant decline
Work / jobs impact	0.619	0.0119	Statistically significant increase
More accurate / better answers	0.648	0.00888	Statistically significant increase
Other / unclear	0.277	0.146	No clear trend
Smarter / improved AI	0.371	0.0818	Directionally increasing (not significant)
General help / assistance	0.188	0.244	No clear trend

Do you have any hopes or expectations for what AI chatbots or apps could bring to your smartphone and computer devices in the future?

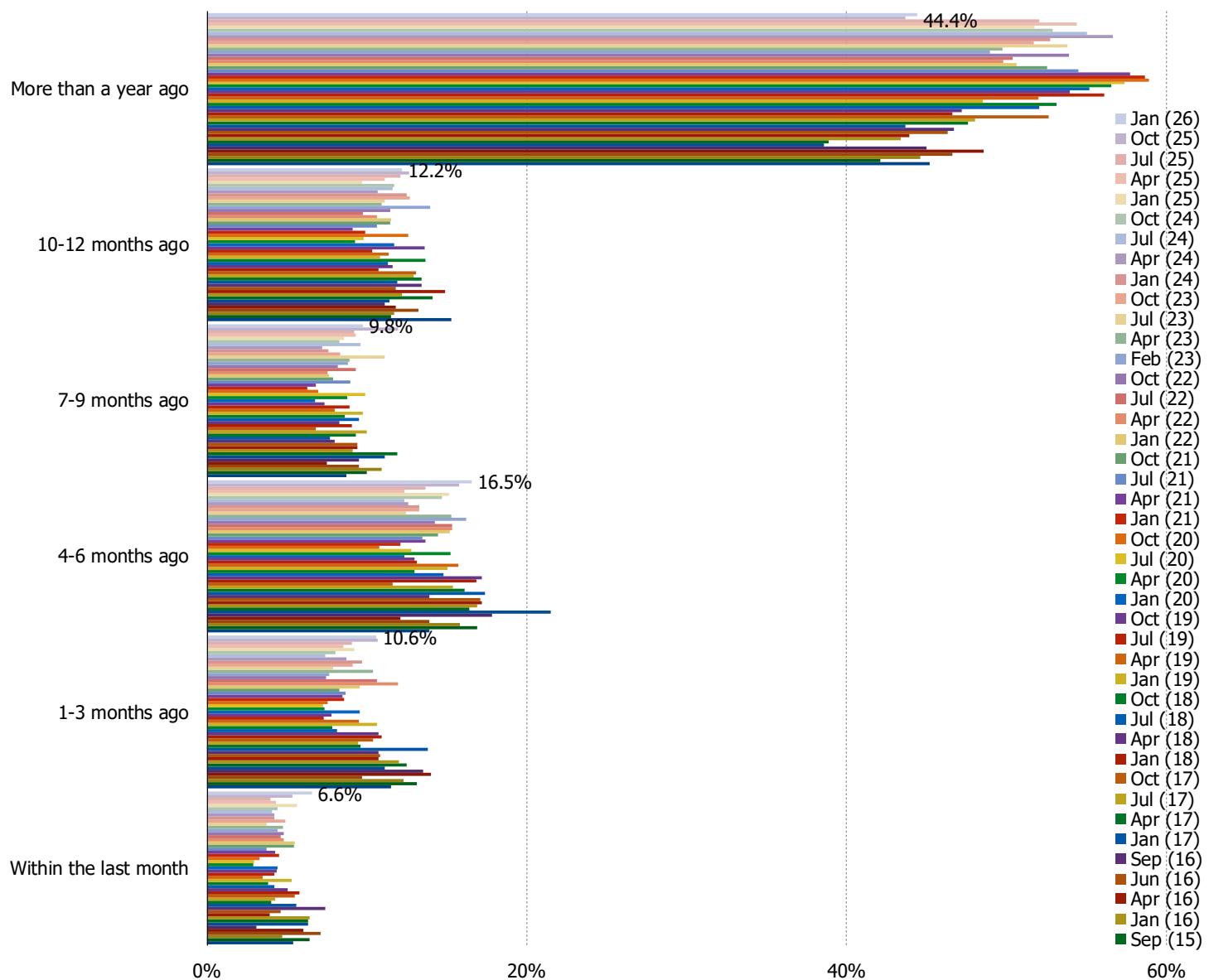
Key insights (data-only)

- The response set is dominated by two buckets:
 - **Other / unclear** (~45–51%)
 - **No expectations / none / no** (~36–44%)
- The most notable shift over time is the decline in "**No expectations / none / no**" (statistically significant), falling to **35.5%** in **2026 Q1**.
- More concrete expectations are emerging, with statistically significant increases in:
 - **More accurate / better answers** (to 1.5% in 2026 Q1)
 - **Work / jobs impact** (to 2.0% in 2026 Q1)
- Even after drilling down Other, this question still produces a lot of **broad/vague language**, suggesting many respondents either don't have clear expectations or don't articulate them in specific feature terms.

SMARTPHONE REFRESH CYCLES

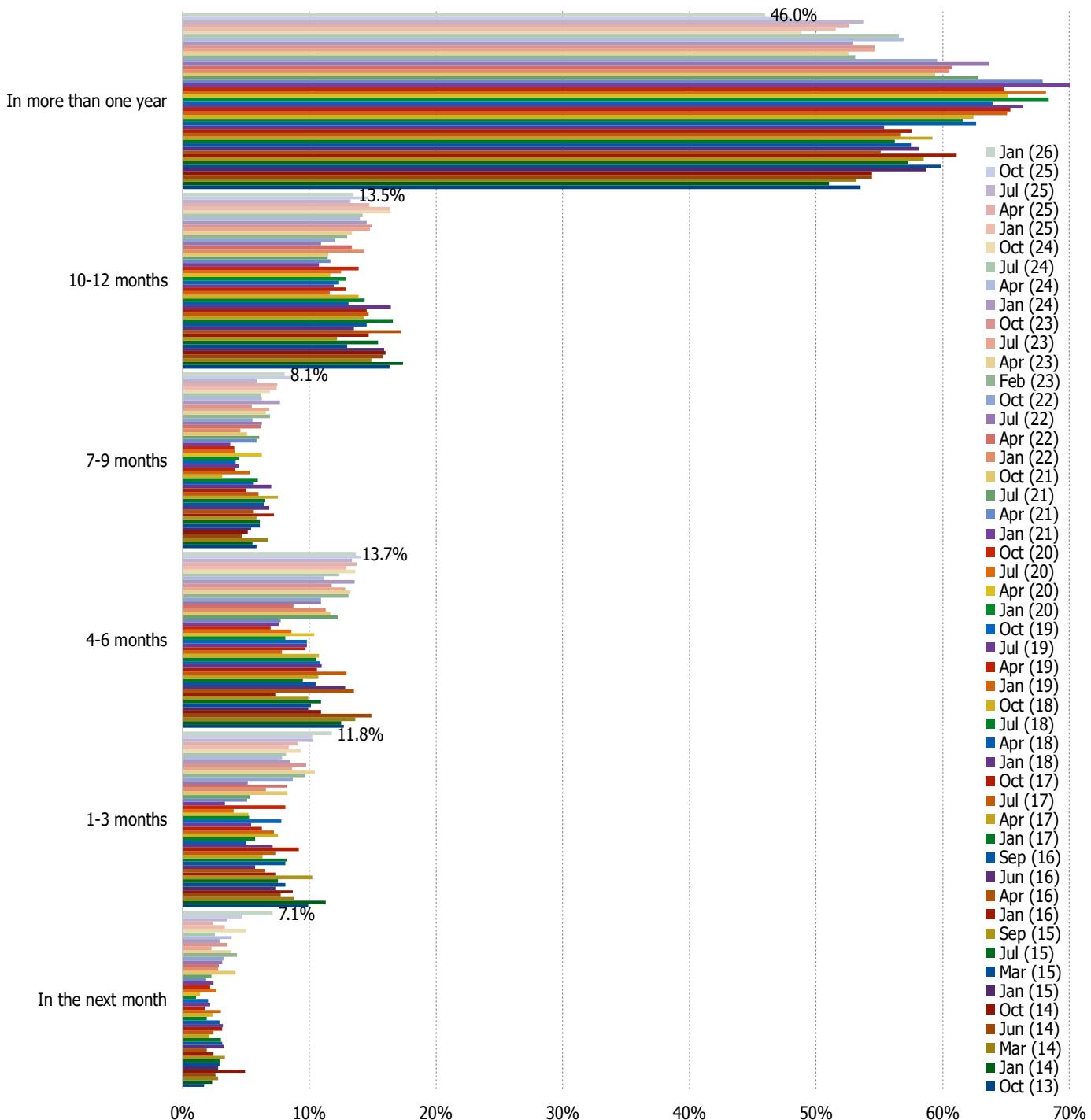
WHEN DID YOU GET YOUR CURRENT SMARTPHONE?

This question was posed to smartphone owners.



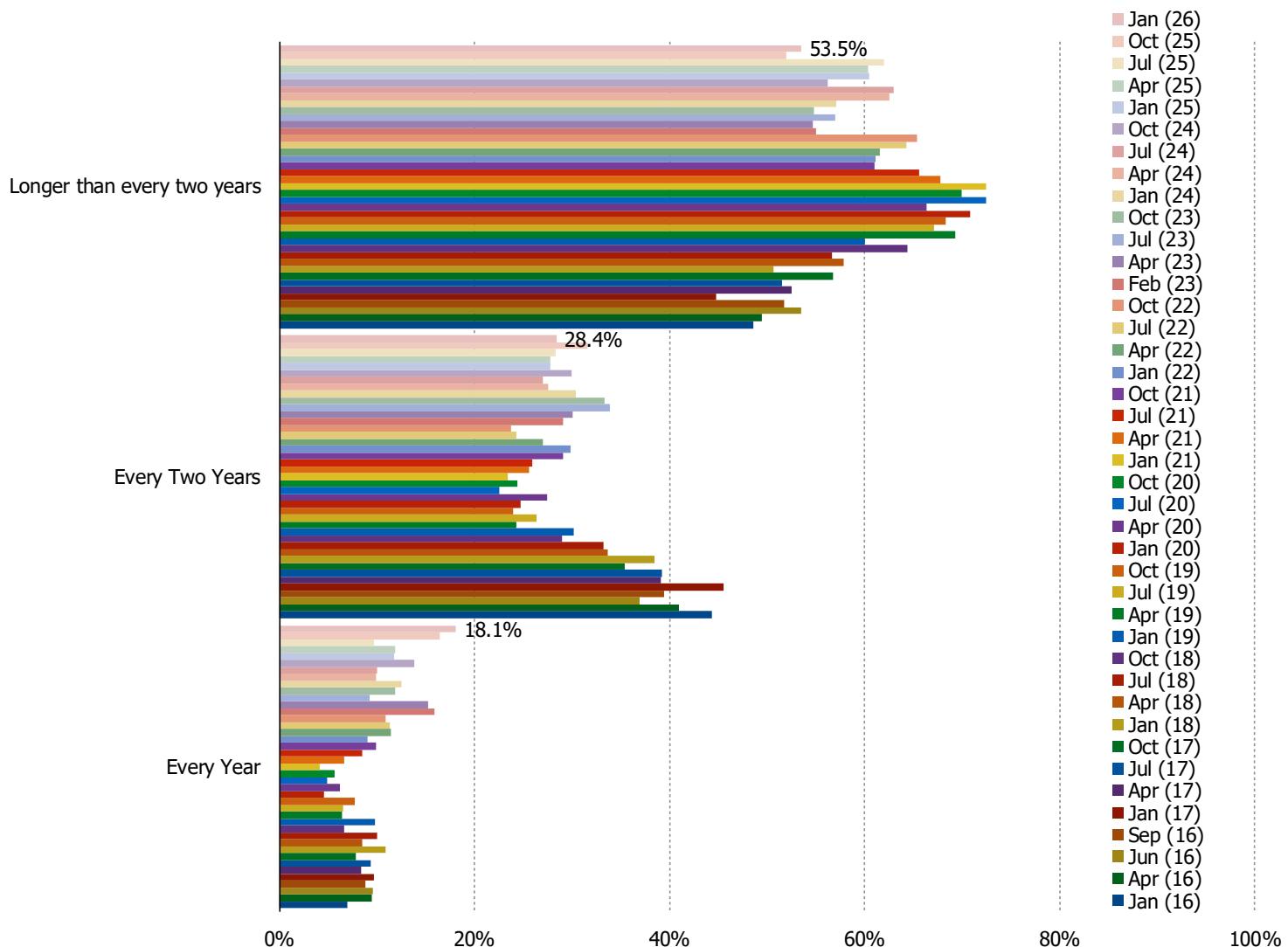
EXPECTED DATE OF NEXT SMARTPHONE PURCHASE

This question was posed to smartphone owners.



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

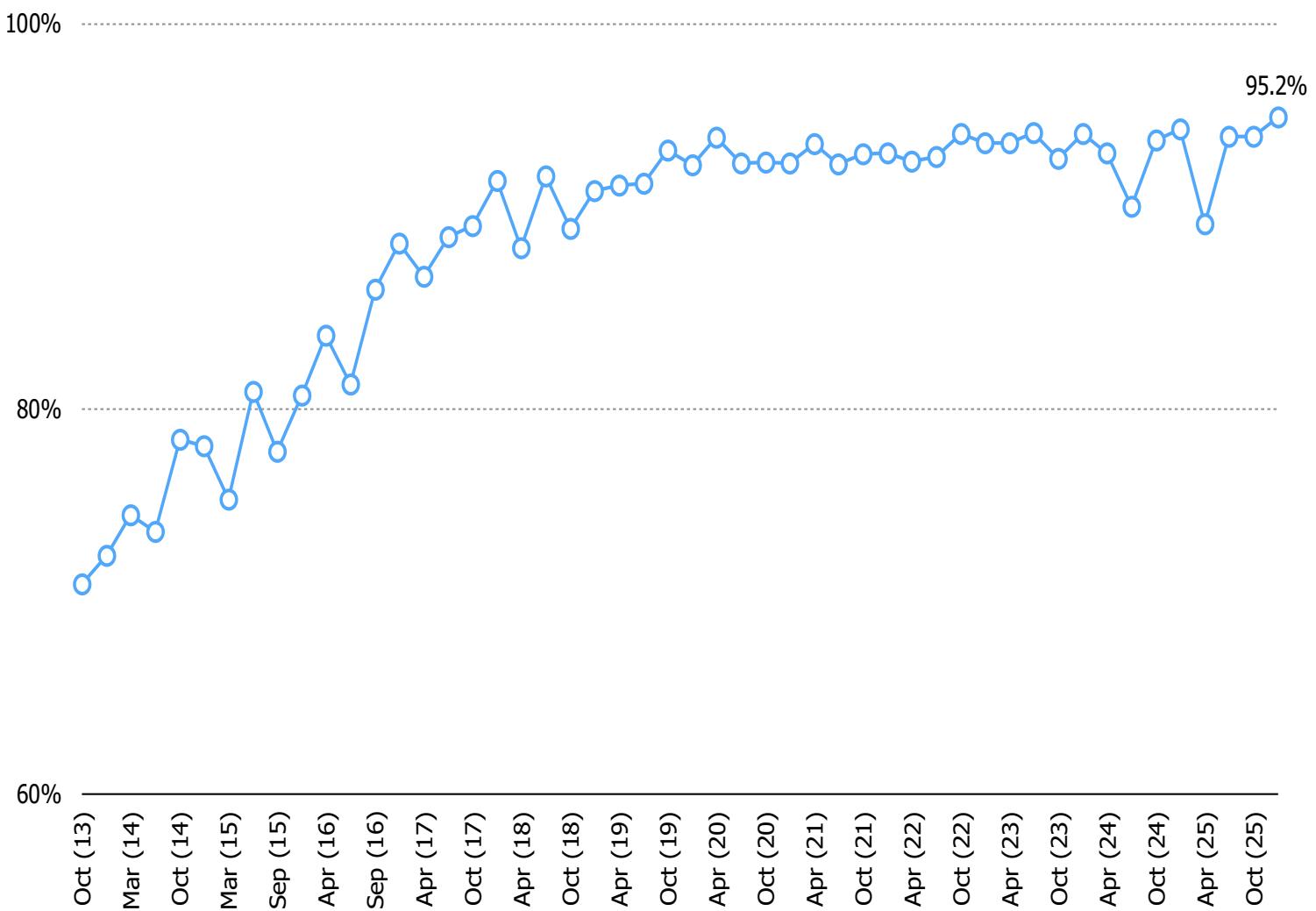
This question was posed to smartphone owners.



SMARTPHONE MARKET SHARE AND MIX

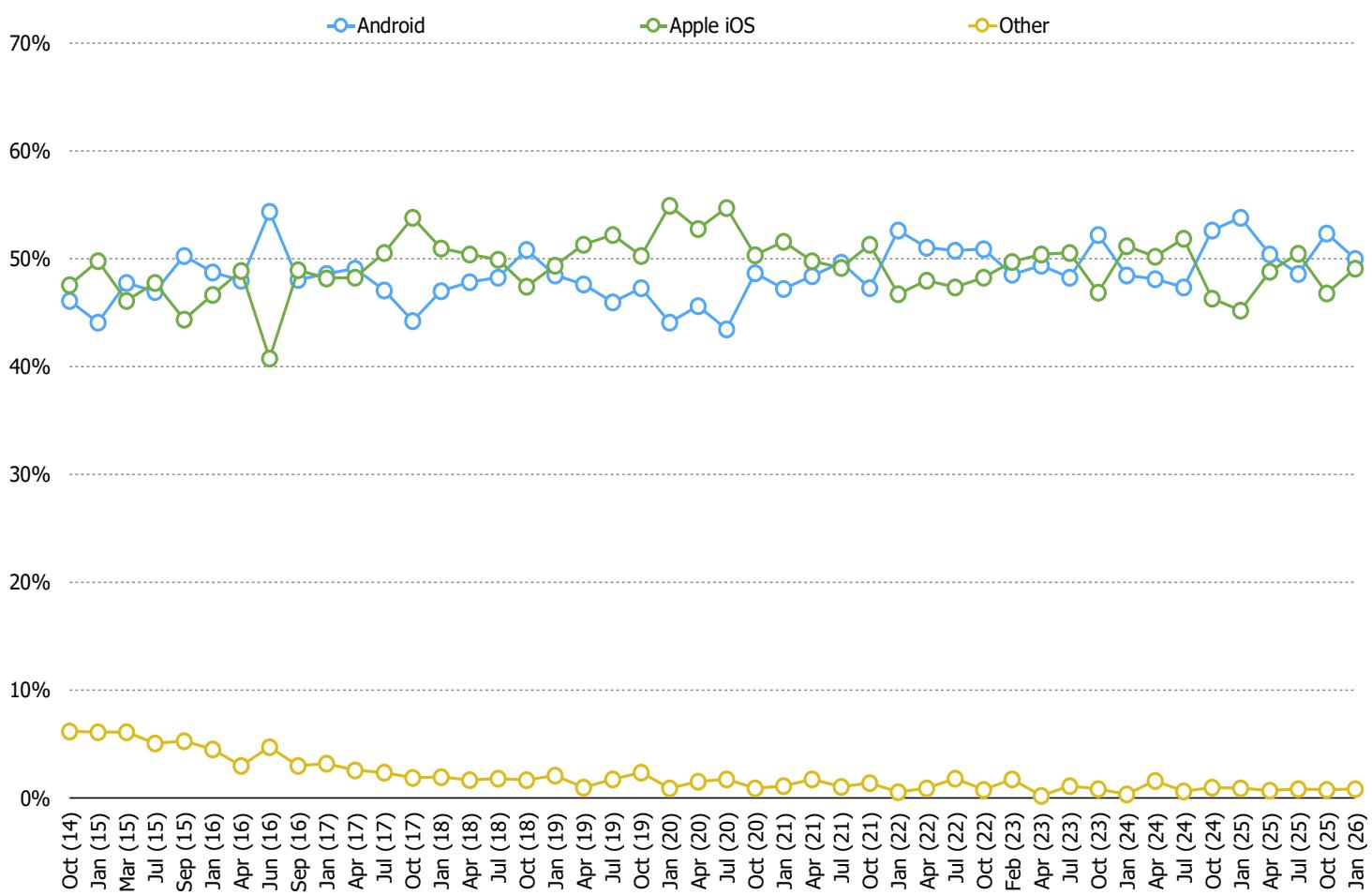
DO YOU OWN A SMARTPHONE?

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.

Quarterly category evolution (% of fill-ins)

(last 8 quarters available)

Category	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2026 Q1
Other / unclear	43.0%	40.9%	41.6%	39.9%	43.2%	38.9%	40.6%	43.1%
Prefer Android / OS features	26.4%	24.4%	29.0%	33.0%	28.0%	29.0%	29.1%	26.6%
Too expensive	18.7%	22.7%	19.0%	18.5%	18.9%	22.1%	19.4%	18.2%
Dislike Apple brand	3.5%	3.5%	3.3%	2.8%	3.1%	4.2%	4.0%	4.4%
Prefer specific Android brand	4.4%	4.7%	3.0%	2.9%	3.6%	2.6%	3.6%	4.0%
Work / provided phone	1.0%	0.9%	1.2%	1.0%	0.6%	0.9%	0.8%	0.8%
No interest / no need	0.8%	0.7%	0.7%	0.8%	1.6%	1.0%	1.6%	2.1%
Hardware durability / battery	0.6%	0.5%	0.5%	0.4%	0.8%	0.9%	0.6%	0.4%
Use both iPhone and Android	0.3%	0.5%	0.5%	0.3%	0.1%	0.2%	0.3%	0.2%
Privacy / security	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%

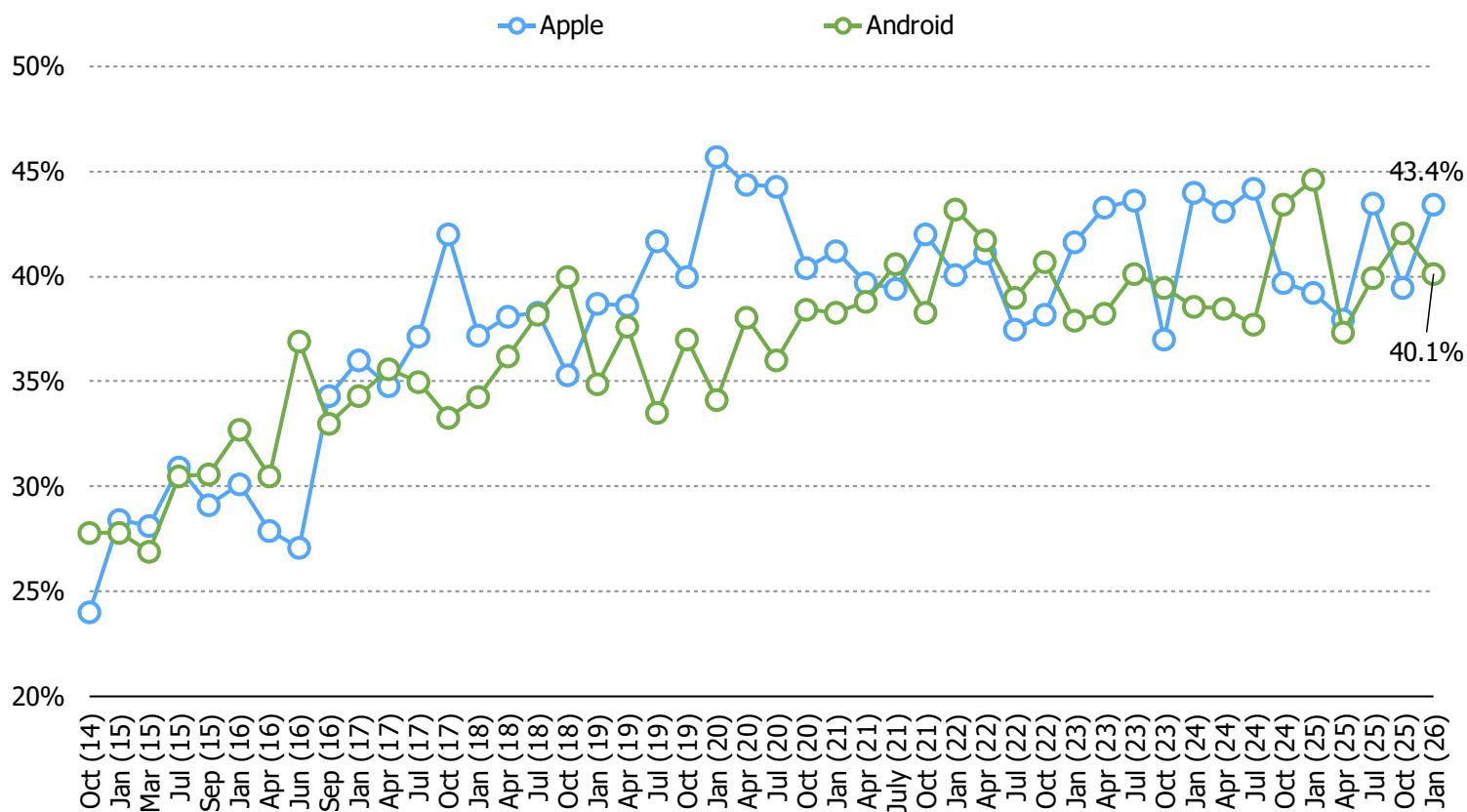
Trend stats (Quarterly; with R² + p-value)

Linear trend across all quarters in the file (after excluding Mar 2025):

Category	R ²	p-value	Direction
Too expensive	0.520	0.000007	Down over time
Prefer Android / OS features	0.269	0.0033	Up over time
Prefer specific Android brand	0.263	0.0038	Up over time
Work / provided phone	0.345	0.00065	Down over time
No interest / no need	0.149	0.0353	Up over time
Other / unclear	0.027	0.389	No clear trend

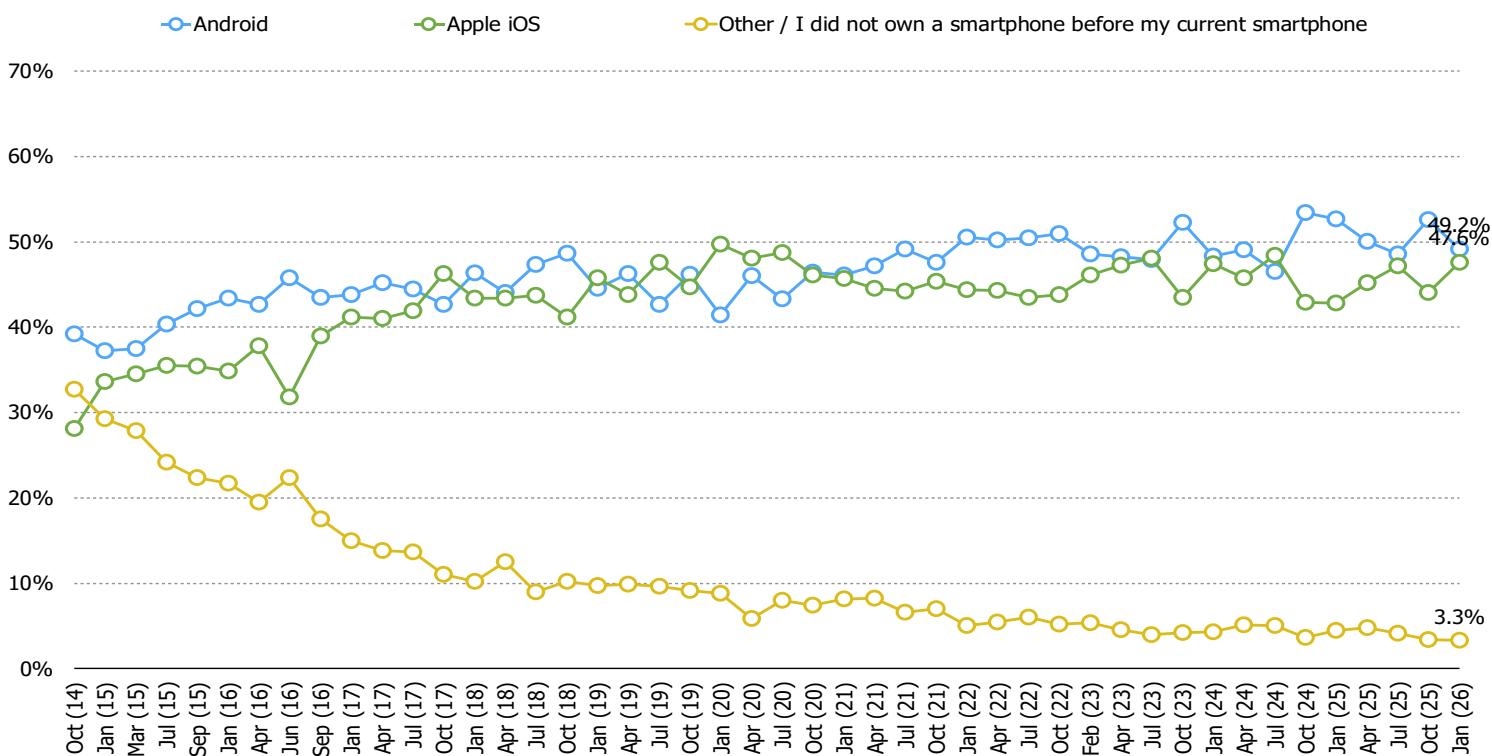
“TRIPLE PLAYS” – PERCENTAGE OF SMARTPHONE OWNERS WHO OWN THE SAME OPERATING SYSTEM FOR LAST PHONE, CURRENT PHONE, AND PLAN TO USE SAME FOR NEXT PHONE

This question was posed to smartphone owners.



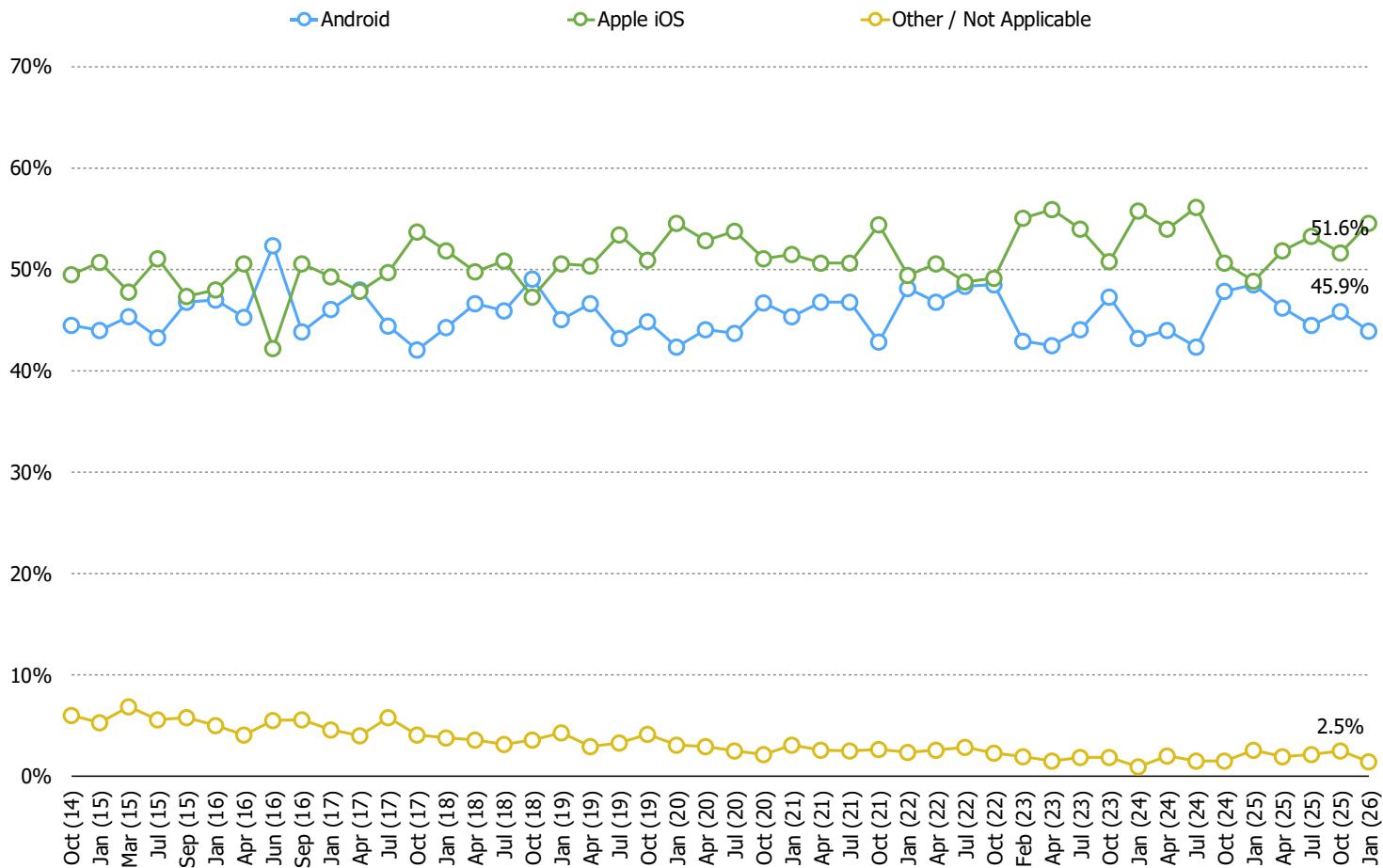
OPERATING SYSTEM FOR SMARTPHONE BEFORE CURRENT SMARTPHONE

This question was posed to smartphone owners.



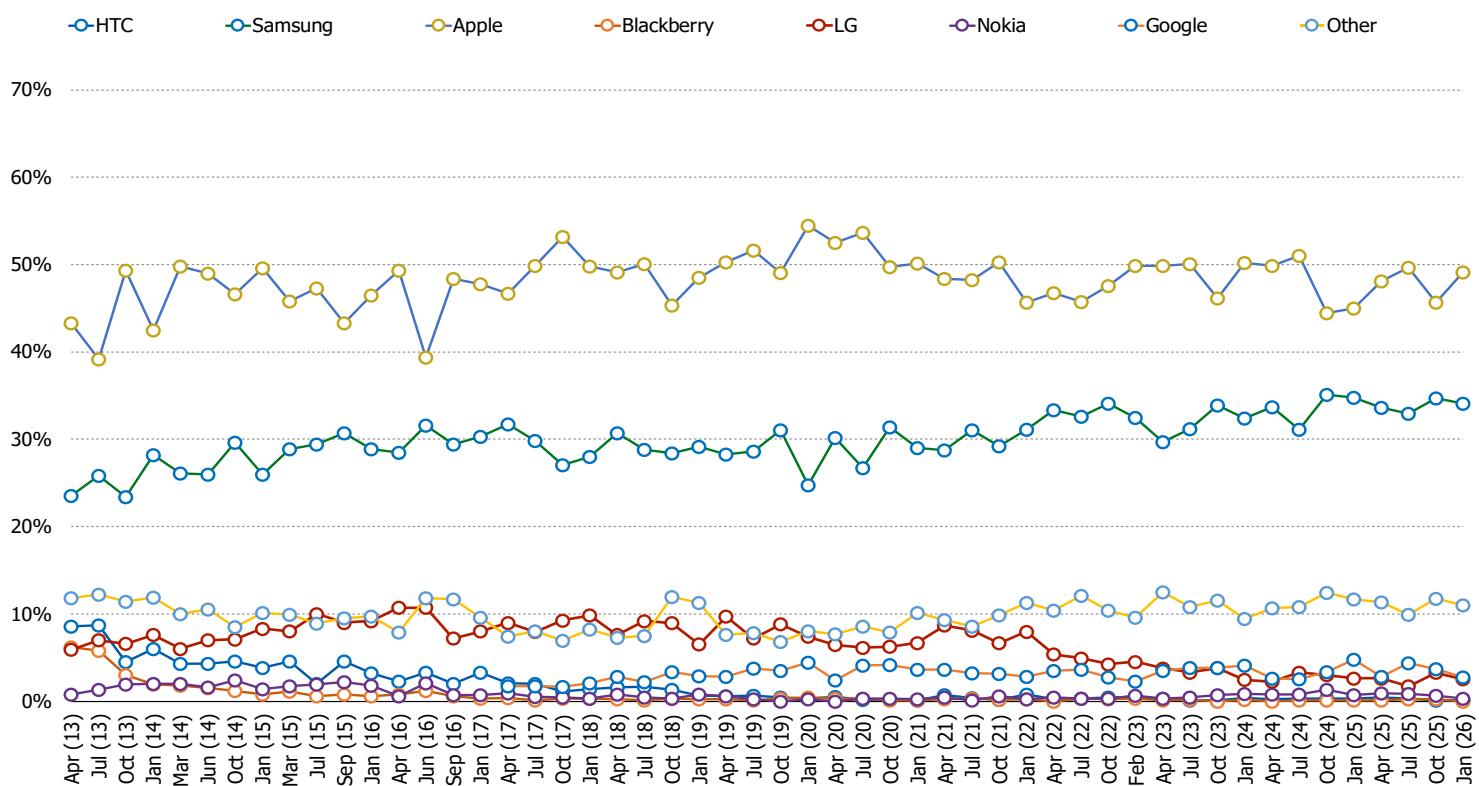
OPERATING SYSTEM FOR NEXT SMARTPHONE

This question was posed to smartphone owners.



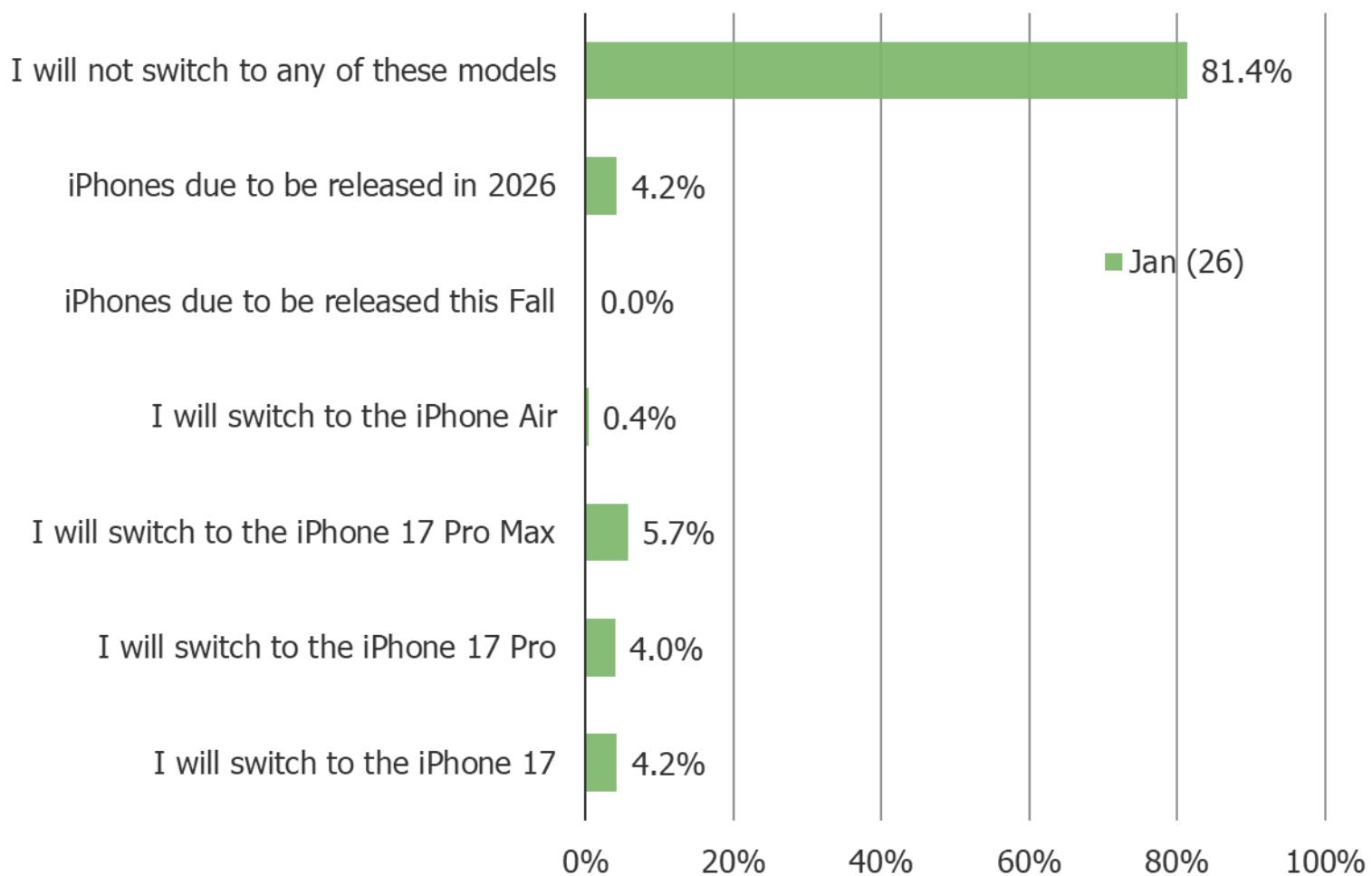
MARKET SHARE - SMARTPHONES

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?

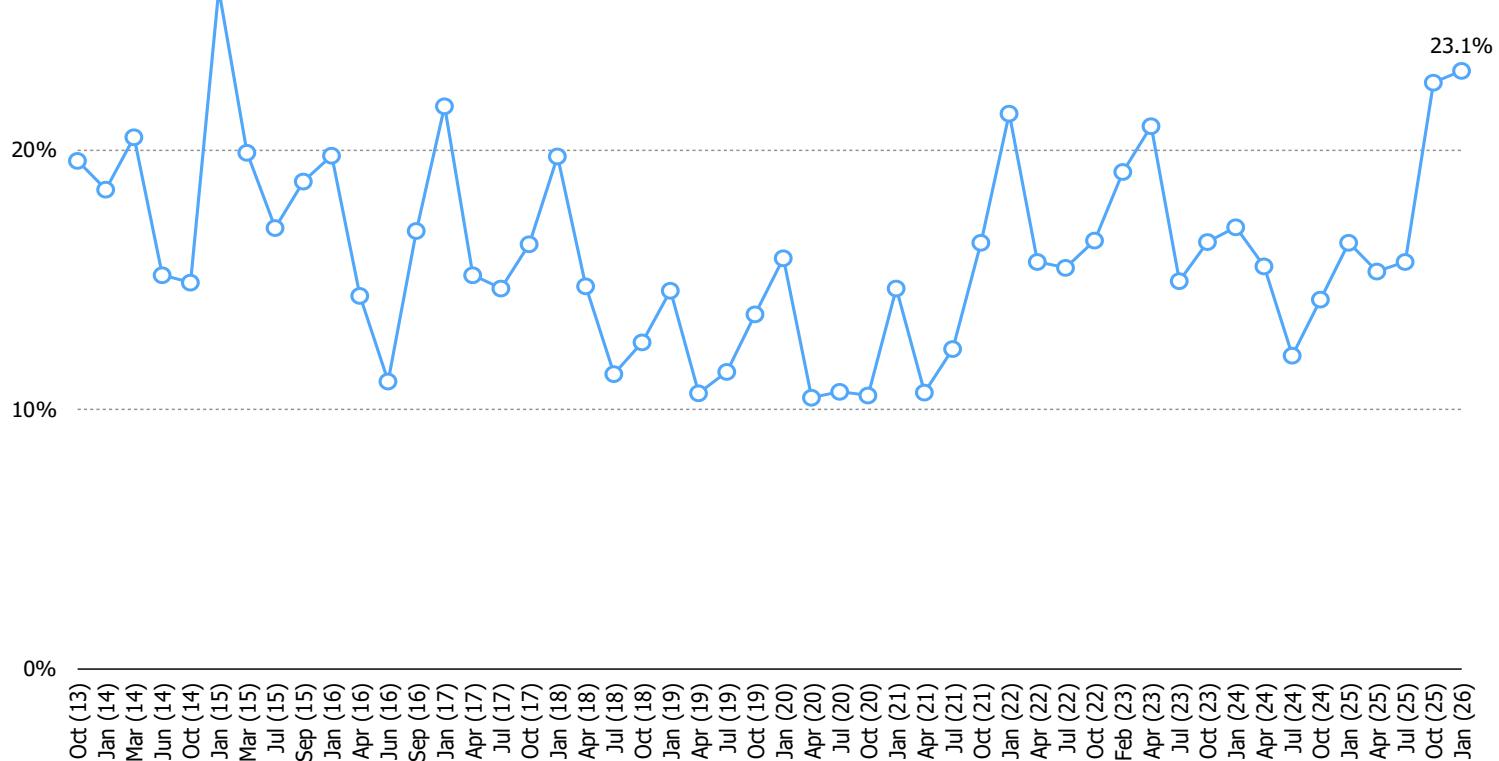
This question was posed to Android smartphone owners.



GOT IPHONE WITHIN PAST THREE MONTHS

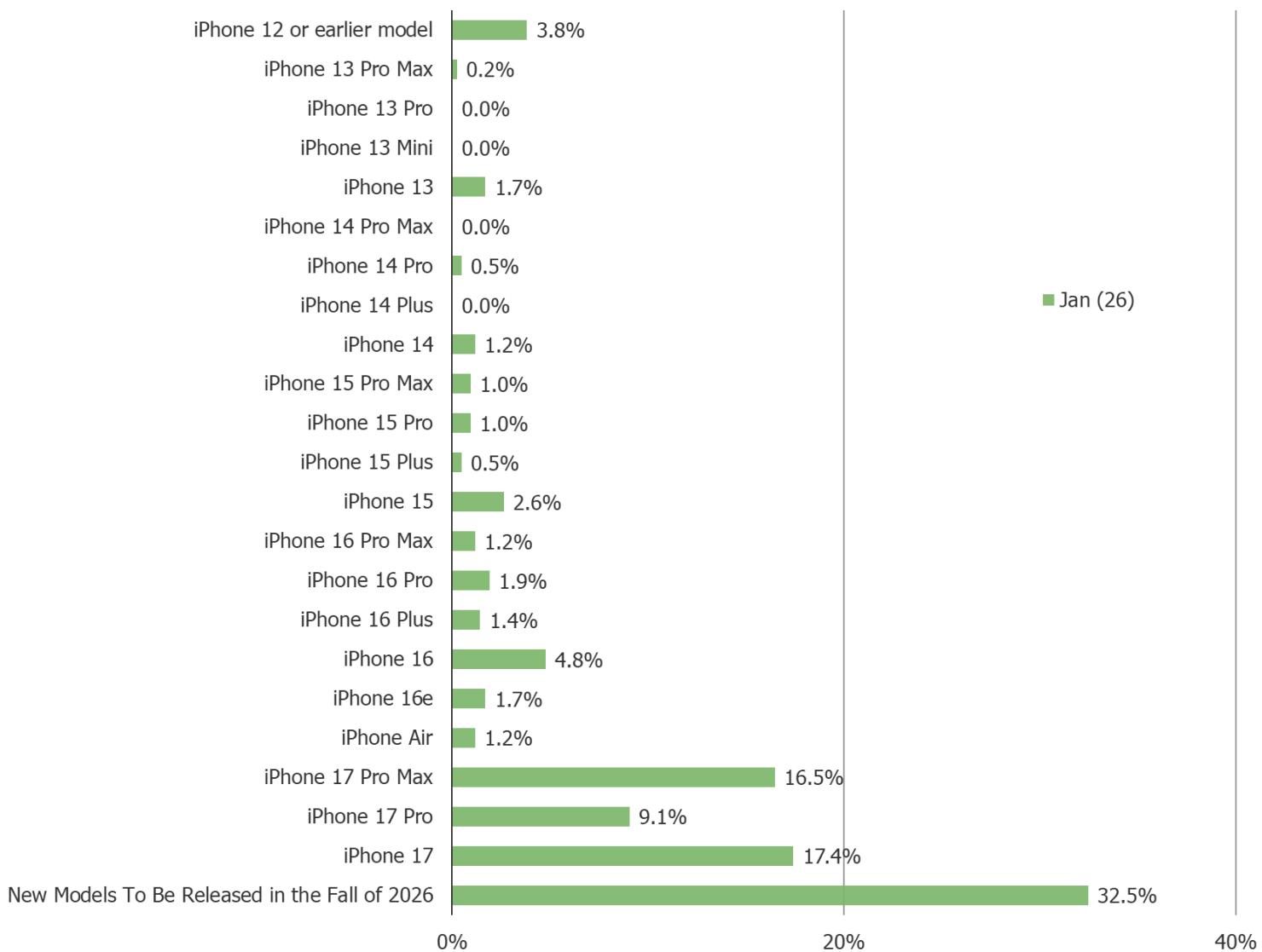
This question was posed to iPhone owners.

30%



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?

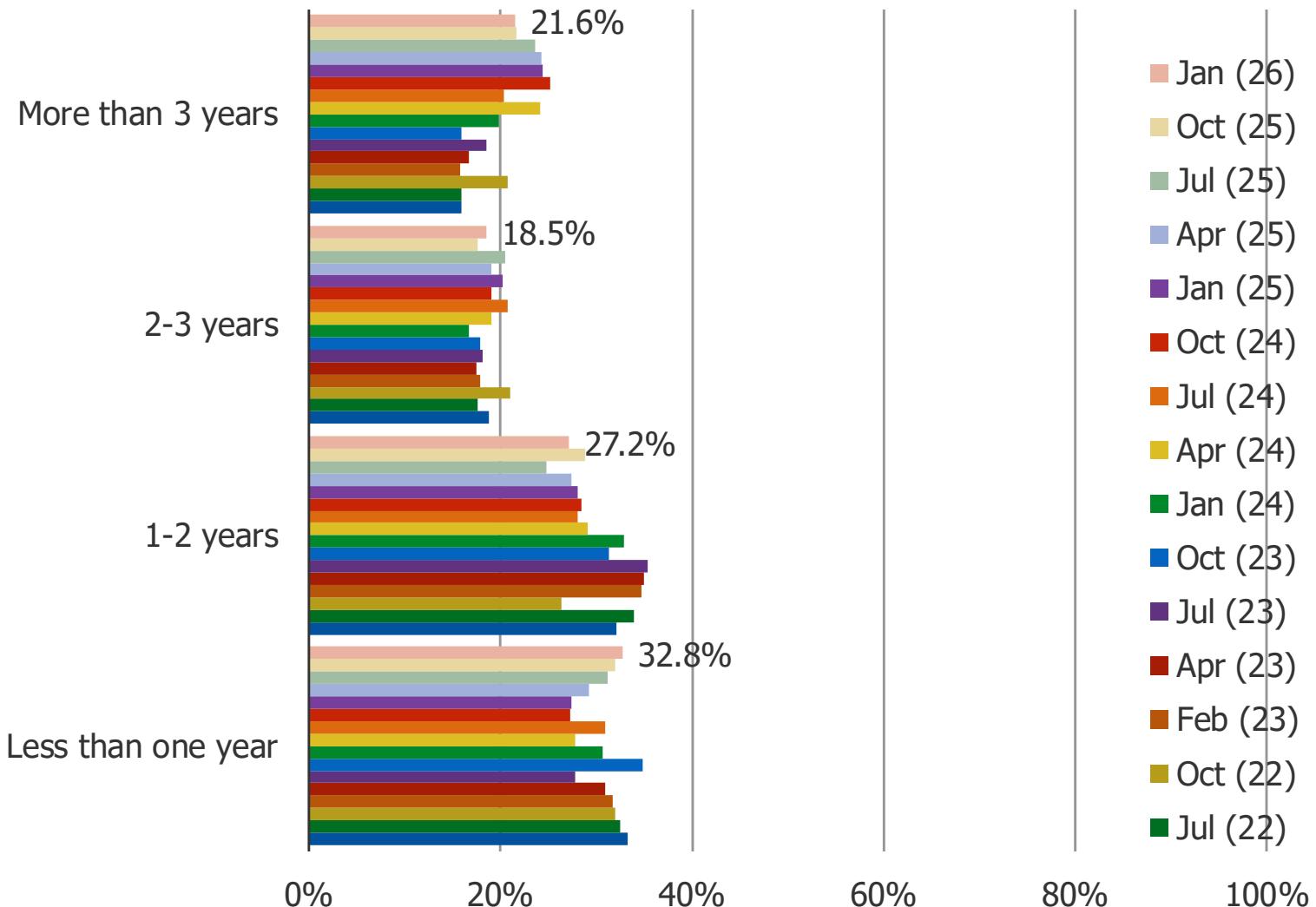
This question was posed to smartphone owners.



IPHONE PURCHASE PREFERENCES AND TESTING A LEASING MODEL

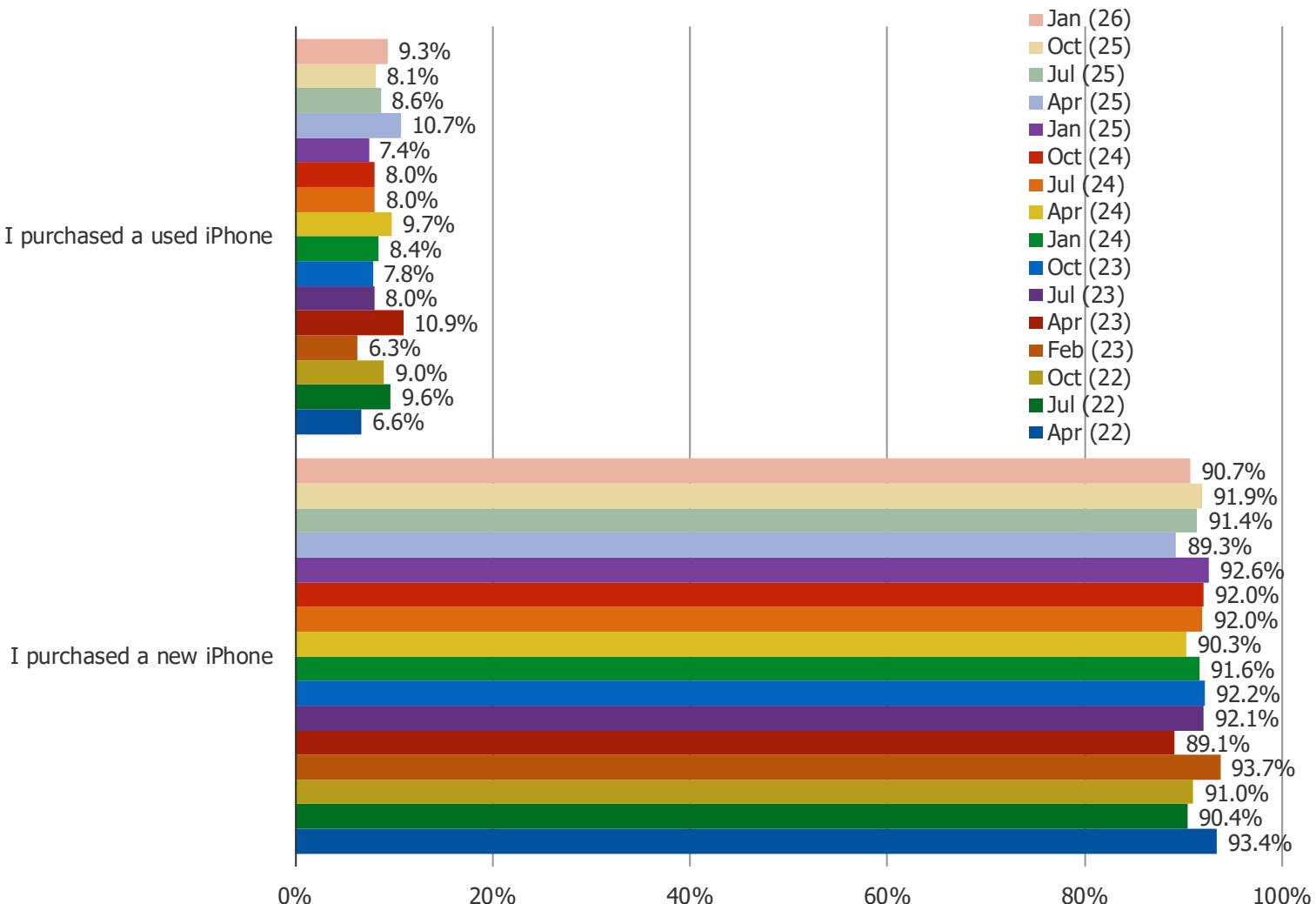
FOR HOW LONG HAVE YOU OWNED YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



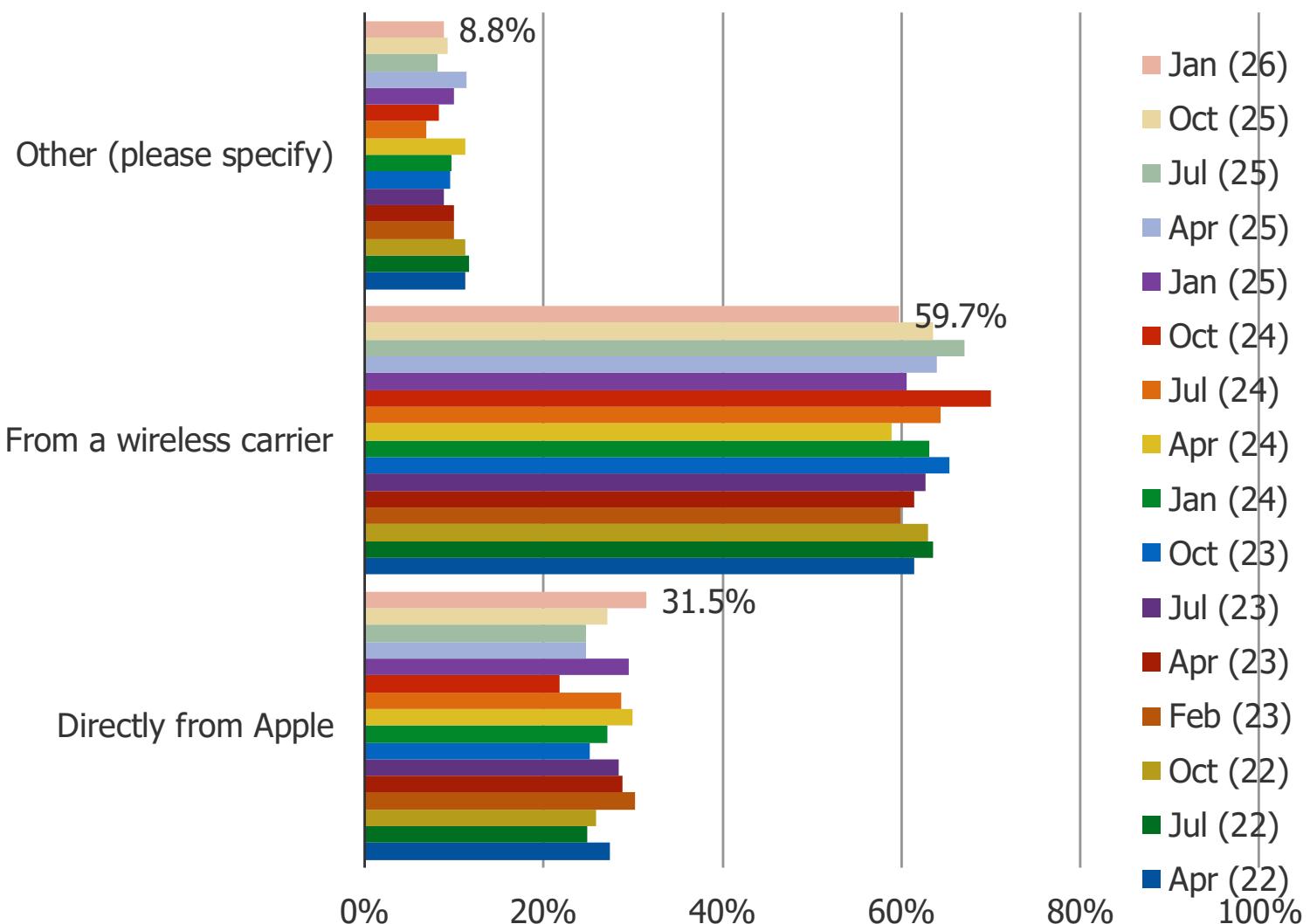
HOW DID YOU PURCHASE YOUR IPHONE?

This question was posed to iPhone owners.



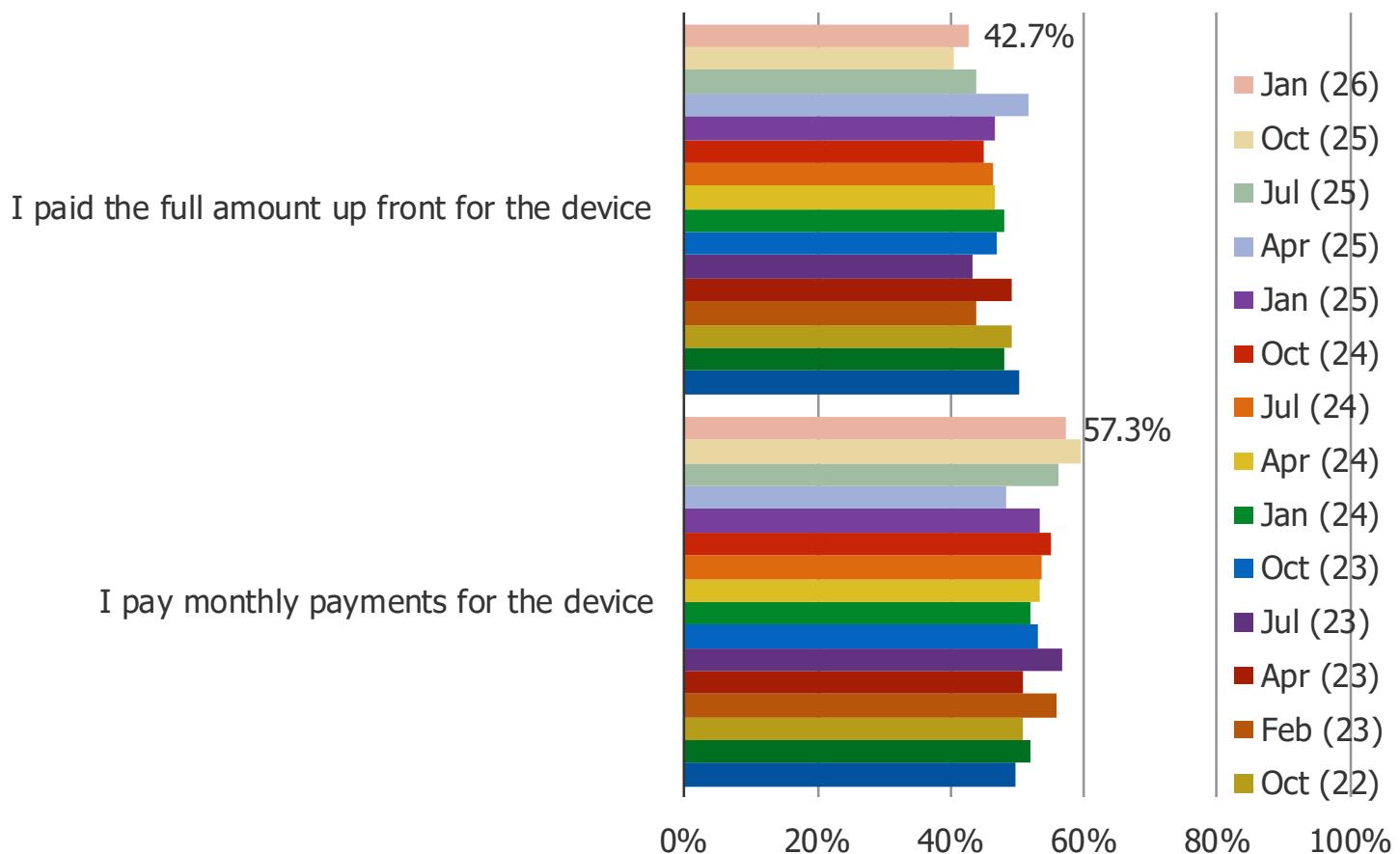
HOW DID YOU PURCHASE YOUR CURRENT IPHONE?

This question was posed to iPhone owners.



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

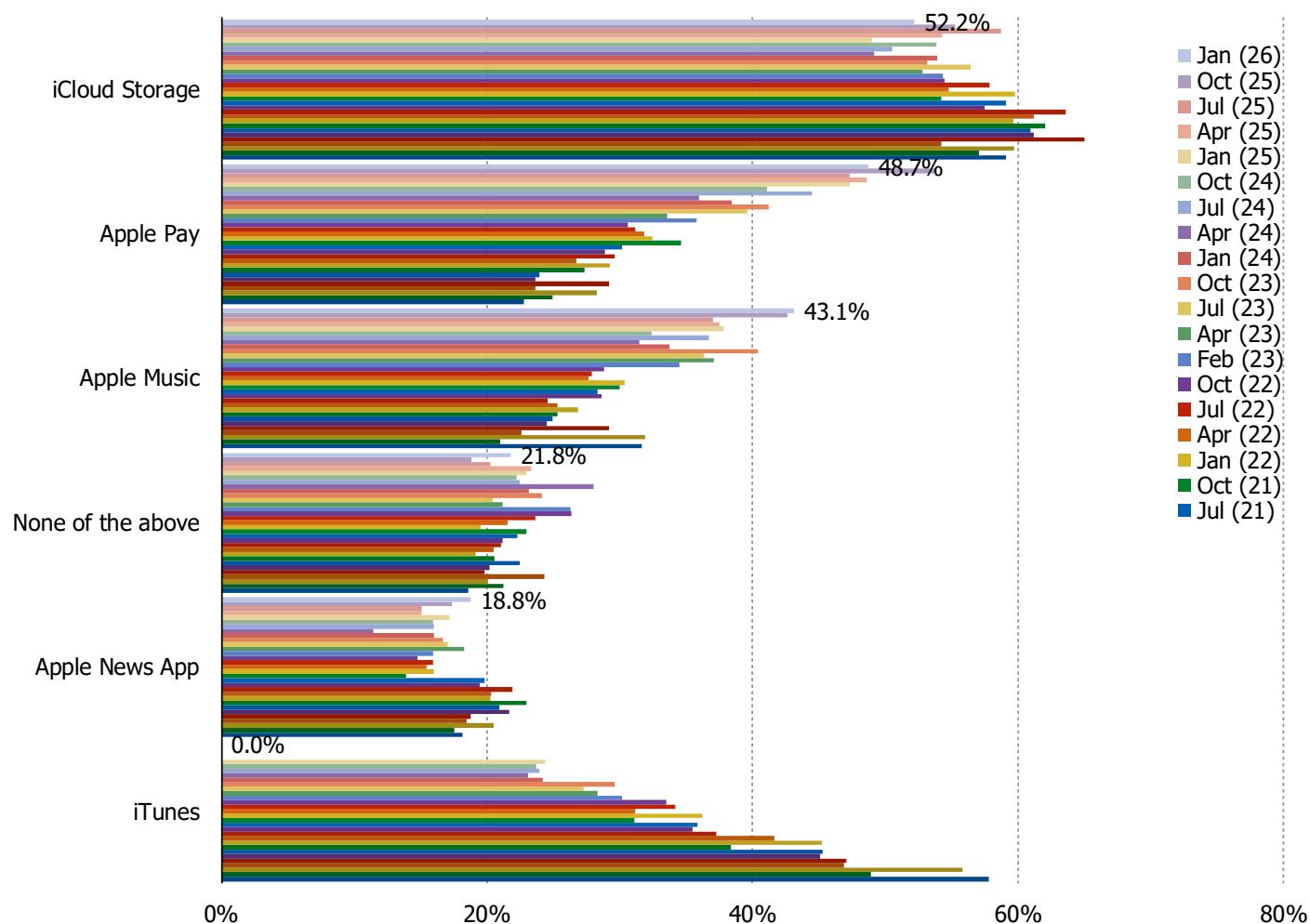
This question was posed to iPhone owners.



AAPL PAY QUESTIONS

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

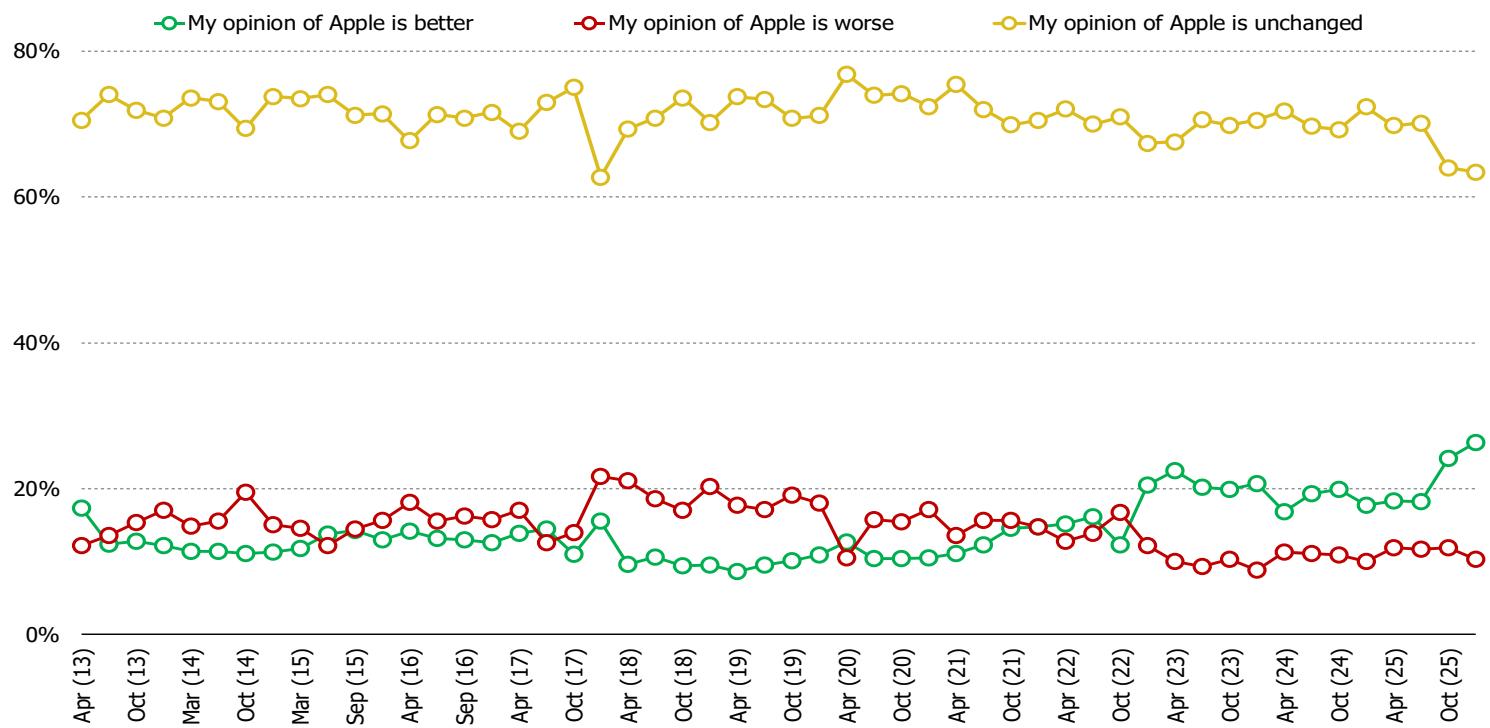
This question was posed to iPhone owners.



CONSUMER SENTIMENT

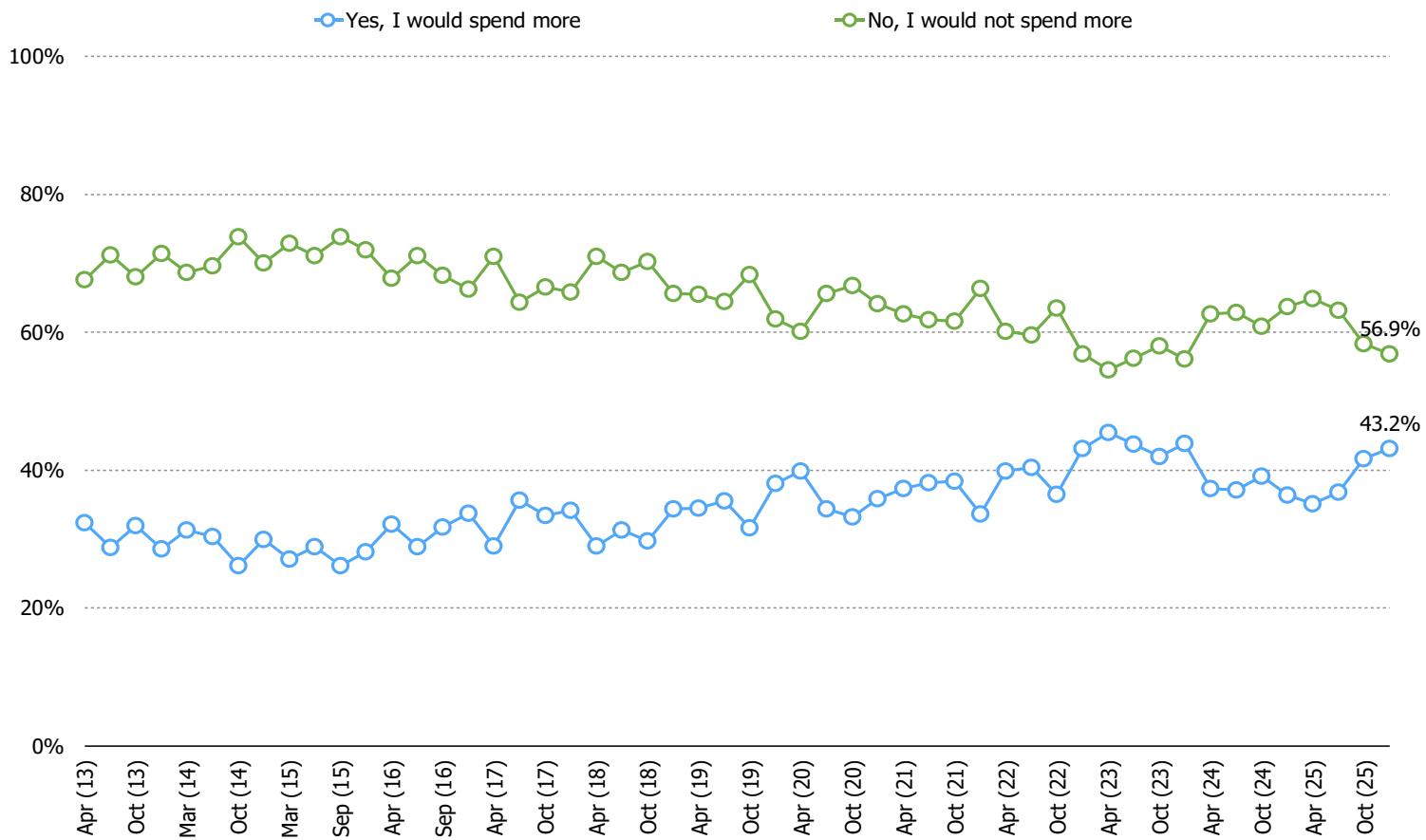
HAS YOUR OPINION OF APPLE CHANGED OVER THE PAST YEAR?

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.

