

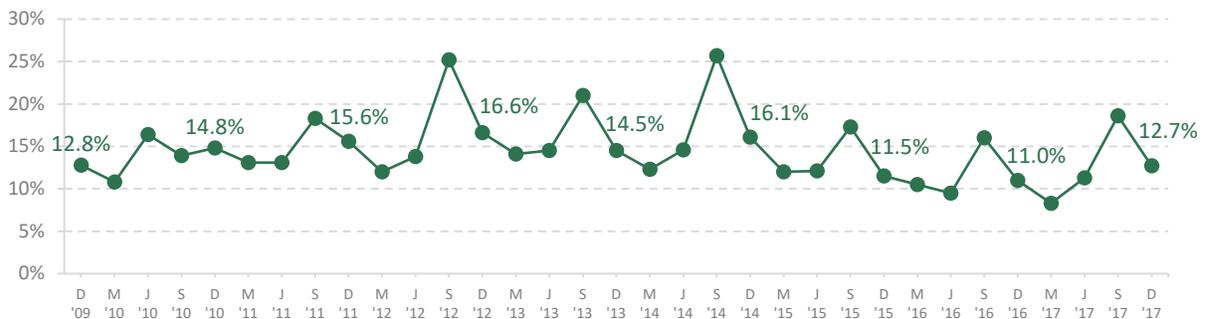
# Smartphone Buying Slows but Apple and Samsung Demand Strong

**Executive Summary.** Demand for smartphones is showing a seasonal downtick, with 12.7% of respondents from 451 Research's *Leading Indicator* panel saying they plan on buying a smartphone in the next 90 days.

## Consumer Market: Future Smartphone Buying

Dec '09 - Dec '17

Percentage of Respondents Who Plan on Buying a Smartphone Over the Next 90 Days



Source: 451 Research's VoCUL: Smartphone Trends (Leading Indicator Survey), Dec 2017

Despite a larger than expected drop from the September survey, next 90 day smartphone demand is at its highest December level in three years.

## THE 451 TAKE

In our September survey, the new iPhone releases drove planned smartphone buying to the highest level in three years. Now that the holiday shopping season is over and the new iPhone releases are in the past, our December results show a seasonal downtick in planned buying. That said, this is the highest December reading in three years.

Demand for Samsung is up as consumers await the new Galaxy S9 and S9+ releases in March that will be based on Qualcomm's next-generation Snapdragon 845 processor, promising improved camera experience using a new graphics architecture which significantly increases the color information it captures.

Meanwhile, demand for iPhones is showing a pullback – a trend we see each quarter following new iPhone releases. However, buying plans are at their highest December reading ever indicating lingering demand for the new iPhone models.

Apple also leads in satisfaction among current owners with the iPhone X garnering the highest *very satisfied* rating, suggesting the device released to celebrate the 10th anniversary of the iPhone did not disappoint consumers.

Although iOS is seeing a downtick in preferred OS among planned buyers, it still leads Android by a wide margin.

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## RESEARCH METHODOLOGY

This report presents the findings of a December 14-January 22 survey of 3,568 primarily North American consumers from 451 Research's *Leading Indicator* panel on consumer smartphone buying. In addition, a New iPhone Owners survey conducted January 17-January 22 yielded an additional 17 respondents who are only included in the satisfaction data for the new devices.

451 Research's *Leading Indicator* panel consists of 25,000 accredited business and technology professionals – as well as early adopter consumers – working in companies across a range of industries. Individuals accepted as panel members have submitted applications for inclusion that identify them as having a high share of wallet towards personal technologies and a high readiness to try new products and services. The *Leading Indicator* report series captures consumer and business spending via weekly demand-side tracking surveys and delivers a continuous view of user perceptions and purchase activity as new products and services enter the market.

The *Leading Indicator* panel is a key component of 451 Research's Voice of the Connected User Landscape (VoCUL) service, which uses a dual lens approach to monitor the impact of technology changes and product introductions on end-user purchasing and usage patterns.

Where the *Leading Indicator* panel makes up the first lens, the second lens uses an identical set of surveys across a US *Population Representative* sample to test how the trends translate in the mass market while also providing demographic segmentation views.

Together, the dual lens approach provides a unique and continuous view on buying behavior that provide insights on how well the early success of products and services will manifest among the larger population.

For all published VoCUL research reports, go to: [451's Voice of the Connected User Landscape](#).



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