

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"For many, and especially younger adults, mobile hardware is the center of digital lives. Accessories that protect that hardware or add functionality to it have grown in sales as a result."

- Billy Hulkower, Senior Technology Analyst

This report looks at the following areas:

- Falling device sales
- Limited concern with brand
- Existing accessories reused

The accessories market faces new challenges looking forward, in that many consumers now use existing accessories when acquiring new phones, because manufacturers are providing sturdier casing in original equipment, and because newer tech products are emerging that are likely to sap budgets that previously had been spent upon mobile accessories. As such, this Report provides the data and analysis necessary for marketers to navigate a near-term future (2017-22) that can be viewed as promising but also full of potential pitfalls.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Falling device sales

Figure 1: US manufacturer shipments of mobile phones, tablets, portable media players, and e-readers, 2012-17

Limited concern with brand

Figure 2: Attitudes to brand of accessory, April 2017

Existing accessories reused

Figure 3: Share* of accessories owned prior to acquisition of current phone, by type of accessory, April 2017

The opportunities

The gift market

Figure 4: Share* of accessories received as gifts, April 2017

Conversion to smartphones

Figure 5: Number of accessories owned by type of phone, April 2017

Focusing on young men

Figure 6: Interest in learning about new phone accessories, April 2017

What it means

The Market - What You Need to Know

Slower growth ahead

Phone accessories present majority of sales

New technology to challenge existing categories

Market Size and Forecast

Accessory sales slow as hardware sales flatten

Figure 7: US manufacturer shipments and fan chart forecast of phone accessories and audio equipment, 2012-22

Figure 8: US manufacturer shipments and forecast of phone accessories and audio equipment, 2012-22

Market Breakdown

Changes in device hardware, wireless audio push growth

Figure 9: US manufacturer unit sales and market share of phone accessories and audio equipment, by segment, 2015 and 2017

Value sales offer alternate perspective

Figure 10: US manufacturer sales of phone accessories, audio accessories, and external flash storage, by segment, 2012-17

Audio faces headwinds from smart products

Figure 11: US manufacturer shipments and forecast of phone accessories and audio equipment, by segment, 2012-22

Market Perspective



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Existing portfolios inhibit sales

Figure 12: Share of accessories owned prior to acquisition of current phone, April 2017

Durable phones decrease need for standard cases

Absence of enthusiasm excepting among young men

Figure 13: Interest in learning about new phone accessories, by gender and age, April 2017

VR headsets compete for dollars

Figure 14: US manufacturer sales of VR/AR headsets, 2013-17

Figure 15: US manufacturer shipments of VR/AR headsets, 2013-17

Smart speakers to reduce Bluetooth speaker sales

Figure 16: US manufacturer dollar sales of digital assistants, 2015-17

Market Factors

New devices promote sales

Figure 17: Share of purchases* made at acquisition of phone, April 2017

Tablet and other mobile device sales in decline

Figure 18: US unit sales of tablets, phones, e-readers, and portable media players, 2012-17

Figure 19: US manufacturer sales of mobile hardware units, 2012-17

Boost in phone sales expected through 2021

Figure 20: US manufacturer unit sales and forecast of mobile phones, 2012-22

Smartphone segment keeps rising

Figure 21: US manufacturer sales of smartphones, 2012-17

Conversion to smartphones to add sales

Figure 22: Number of accessories owned by type of phone owned, April 2017

Figure 23: Feature phone ownership, by age, January 2017

Growing audience of teen and tween phone owners

Figure 24: Mobile phone ownership among teens, by gender and age, April 2015-November 2016

Gifting

Figure 25: Ownership and share of accessories received as gifts, April 2017

Key Products - What You Need to Know

Majority own ear buds, headphones, case

Premiums a tough sell

Solar chargers desired

What's Working?

Low-cost segments most commonly owned

Figure 26: Ownership of accessories, April 2017

Mid-tier pricing

Figure 27: Attitudes to pricing, April 2017

Amazon, carriers dominate retail

Figure 28: Location of purchase, April 2017

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

What's Struggling?

Branding

Figure 29: Preference for phone/tablet brand or other familiar brands, April 2017

Audio quality

Figure 30: Willingness to pay premium for superior audio quality, by gender, April 2017

Research

Figure 31: Conduction of research prior to purchase and interest in selection assistance, April 2017

Sales at office supply stores

Figure 32: Location of purchase, April 2017

What's Next?

Solar chargers

Power and storage

Figure 33: Interest in owning and using solar chargers, and cases with additional power and memory, April 2017

Bundled accessories

Figure 34: Interest in bundles and phone carrier discounts, April 2017

Signal boosters

Figure 35: Issues with call clarity and auto connectivity, April 2017

The Consumer - What You Need to Know

Young men top audience

Purchases made across life of product

Design factor in promoting purchases

Ownership and Timing of Purchase

Purchases made across life of phone

Figure 36: Timing of accessory purchase, by accessory category, April 2017

Young men lead in ownership

Figure 37: Number of phone accessories owned, by gender and age, April 2017

Figure 38: Number of phone accessories owned, by Hispanic origin and generation, April 2017

Figure 39: Number of phone accessories owned, by location of residence, April 2017

Accessories Used with Tablets

Room for growth in every listed category

Figure 40: Accessories used with tablets, April 2017

Young men, Hispanics use more accessories

Figure 41: Number of accessories used with tablet, by gender and age, April 2017

Figure 42: Number of accessories used with tablet, by Hispanic origin and generation, April 2017

iPad owners less keen on accessories than Surface owners

Figure 43: Number of accessories used with tablet, by brand of tablet owned, April 2017

Reasons for Purchasing

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Durability and design

Figure 44: Reasons for purchasing accessories, April 2017

Younger buyers seek makeovers

Figure 45: Reasons for purchasing accessories, by age, April 2017

Younger Hispanics, men act on impulse

Figure 46: Impulse purchasing of accessories, by Hispanic origin and generation, April 2017

Interest in Acquiring New Accessories

Younger men not done buying

Figure 47: Continuing interest in acquiring accessories, CHAID Tree output, April 2017

Appendix - Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

CHAID methodology

Abbreviations and terms

Abbreviations

Terms

Appendix - The Market

Manufacturer sales - Value

Figure 48: US manufacturer sales of mobile phone accessories, audio accessories, and external flash storage, by segment, 2012-17

Manufacturer sales - Volume

Figure 49: US manufacturer unit sales and forecast of phone accessories, 2012-22

Figure 50: US manufacturer unit sales and forecast of headsets, 2012-22

Figure 51: US manufacturer unit sales and forecast of speakers, 2012-22

Manufacturer sales and forecast – Mobile phones

Figure 52: US unit sales and fan chart forecast of mobile phones, 2012-22

Population by age

Figure 53: Population by age, 2012-22

Appendix - The Consumer

Figure 54: Mobile phone ownership among adults and teens, April 2014-November 2016

APAC +61 (0) 2 8284 8100 **EMAIL:** reports@mintel.com