

Smartphones and Accessories - US - 2023

Report Price: £3695 | \$4995 | €4400

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This report looks at the following areas:

- Smartphone purchase history and purchase intent
- 5G capable smartphone ownership and interest
- Motivations for purchasing a smartphone
- Smartphone formats of interest
- Wearable technology ownership
- Smartphones and accessories attitudes and behavior

Smartphone ownership in the US is nearly universal, with 95% of US adults personally owning one. What's more, nearly two thirds of smartphone owners keep their phone with them at all times, pointing to the essential role of smartphones. Beyond their place in connectivity (eg calls, messaging), smartphones enable creativity (eg taking photos, posting to social media), entertainment (eg music, videos, gaming), and life management (eg finance tracking, digital wallets, smart home control). This entanglement with various aspects of life strengthens the perception of smartphones as necessary items, which is helpful amid times of personal cost-cutting.

However, the category isn't immune to economic uncertainty. While smartphone ownership is consistent across income levels and financial situation, purchase behavior varies. Consumers are holding onto their phones for longer periods of time, and the leading drivers of new smartphone acquisition are issues related to current phone performance (eg shattered screen, slow operation, reduced battery life). These "forced" purchase drivers far outweigh "optional/additive" purchase motivators (eg new model release). Additionally, interest favors brands seen as more affordable, with Samsung products steadily gaining on Apple in both ownership and purchase intent.

As consumers seek to prolong the time between purchases, accessories that help them protect their phone from damage and those that enhance performance can be interim income streams for brands and can help in nurturing goodwill among cost-conscious consumers. Over the near term,



"US adults are increasingly reliant on their smartphones, making the devices a necessity."

– Fiona O'Donnell, Senior Director – US Reports

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accessories that enhance the core phone experience, including the camera, will resonate most broadly. Brands must keep personal health and the environment in mind over the long term.

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