

# Smartphones and Wearables - China - 2023

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## This report looks at the following areas:

- Consumers' perceptions of different smartphone brands.
- Marketing activities that can increase consumers' favourability towards smartphone brands.
- Consumers' usage frequency of wearable devices.
- Reason for using smartwatches/wristbands.
- Usage scenarios of wearable devices consumers would be interested in.
- Consumers' attitudes towards smartphones and wearable devices.

After experiencing a sharp decline in 2022, China's smartphone market did not show the expected recovery in the first half of 2023. In the face of economic uncertainty, some slight progress is not enough to persuade consumers to change their smartphones. Extended replacement cycles and consumers' more rational spending attitudes have prompted smartphone brands to shift their focus to the premium market in order to maintain their position in this highly mature market. However, Mintel's data shows that most domestic brands have yet to shake off their stereotypes and establish themselves as premium options in the minds of consumers.

Meanwhile, the overall wearables market is still struggling to recover from the downturn, as consumers tend to reduce spending on non-essential digital products under financial pressure. Mintel's data suggests that TWS earbuds have the highest penetration rate among wearables. However, active usage of wearable devices remains relatively low, with only 41% of smartwatch owners using the device once or more a day, making it the most frequently used wearable device. To increase adoption and usage, wearable device brands must demonstrate to consumers the necessity of these devices in their everyday lives.



"Consumer delays in smartphone replacement amid economic volatility and extended smartphone lifecycles are impacting China's smartphone market. In striving to create a premium image, domestic brands can strategically leverage sustainability and cultural resonance to positively shape consumer perceptions."

– Toby Xu, Research Analyst

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