

The Shifting Smartphone Delight!

A report covering mid-range smartphones showing how post-purchase experiences are becoming critical in consumer delight compared to the pre-purchase specifications triggers.

December 2024



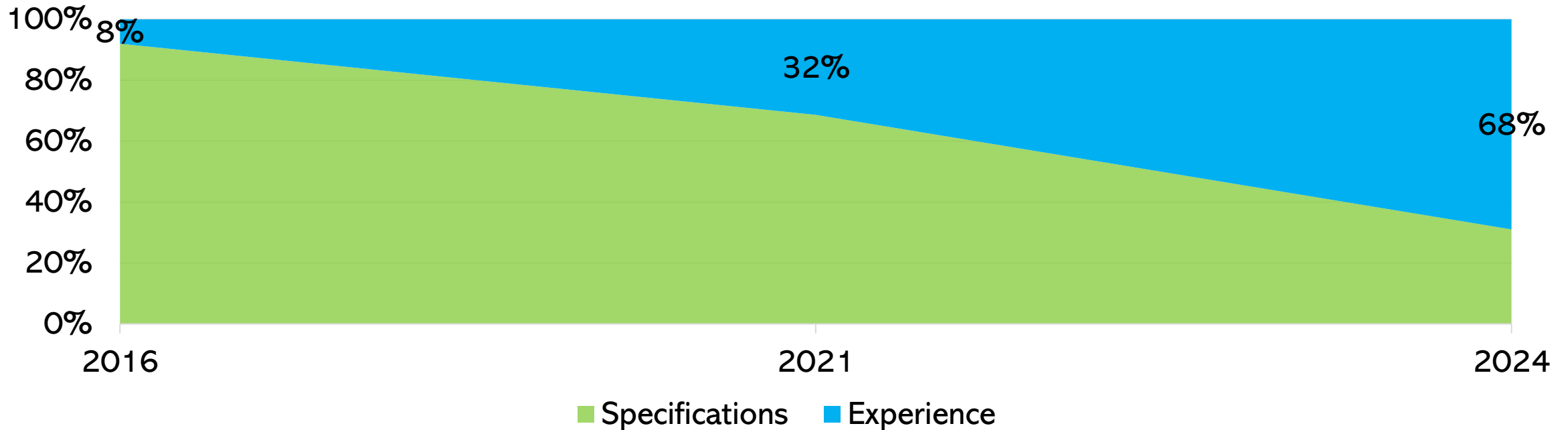
“Fill your life with **experiences, not thing. Have stories to tell, not **stuff** to show.” *Anonymous***



Similarly, smartphone users are increasingly getting interested in cherishing the experiences that a smartphone creates for them, rather than looking into what's inside.

The Big Shift in Smartphone Delight

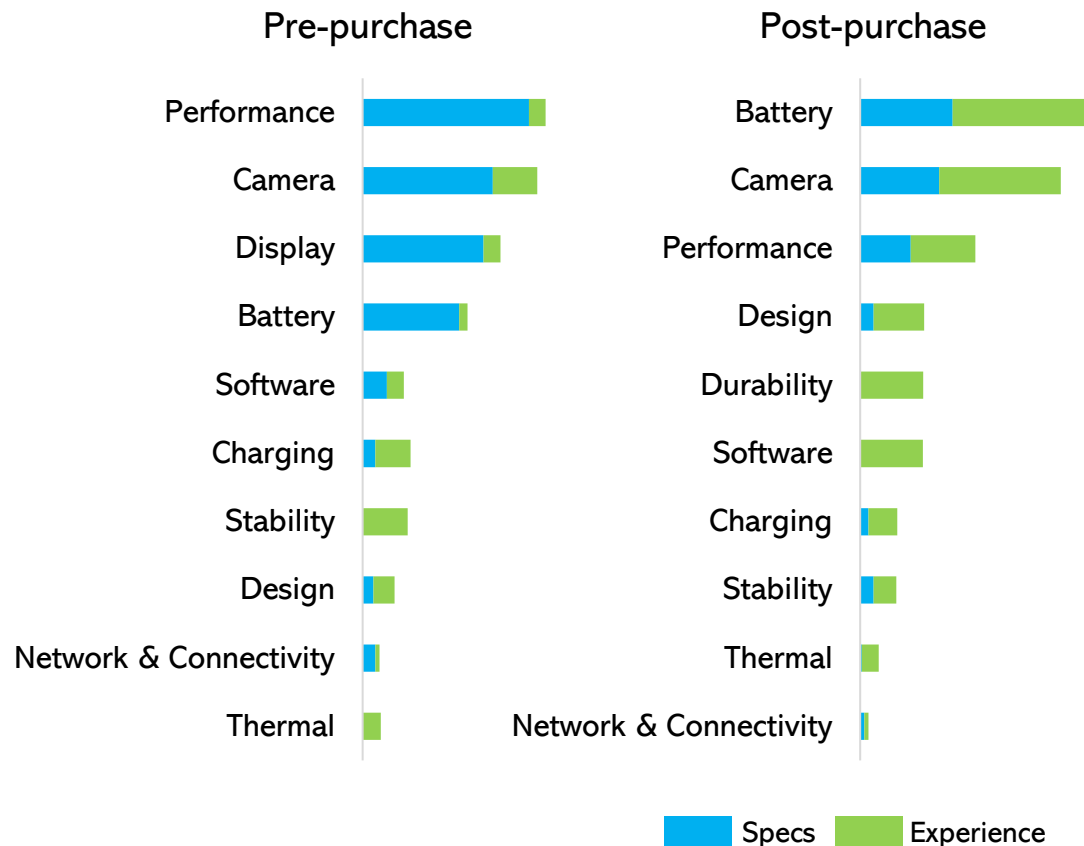
The Shifting Smartphone Delight



A big shift is taking place in the way consumers measure the performance of the smartphones they use. Compared to 2016, when the trigger of sale and trigger of satisfaction was same – specifications - today consumers are weighing experience derived more than anything. Even if the sale might still get triggered by specifications which are easy to market, the consumers are increasingly deciding basis the experience they enjoy post-purchase of a smartphone.

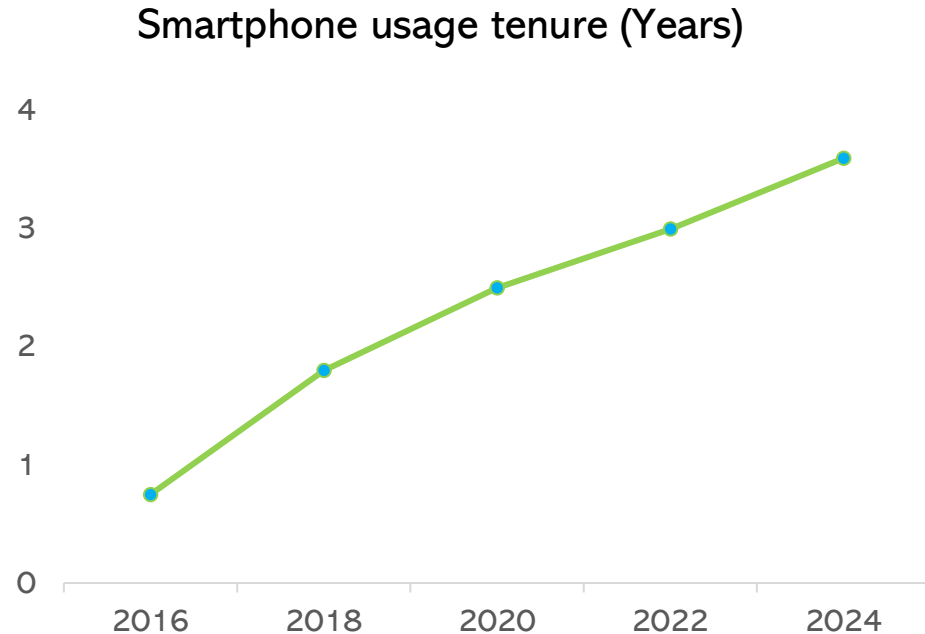
The Factors Determining Consumer Delight

Top 10 factors determining smartphone delight



- **Experience driven factors** feature among the top 10 consumer delights in a smartphone. Factors such as **battery life, design, stability, thermal efficiency, charging, software** and **durability** seen impacting the consumer delight in recent times.
- Factors like camera, performance and battery where both specifications and experience impact the consumer satisfaction, also witnessing a change where the shift is happening more towards non-specification driven satisfaction such as night photography in camera, gaming in performance, and the battery life.
- After AMOLED screens display hasn't seen much of an innovation reducing its impact on the consumer delight.

Consumers are retaining smartphones for long

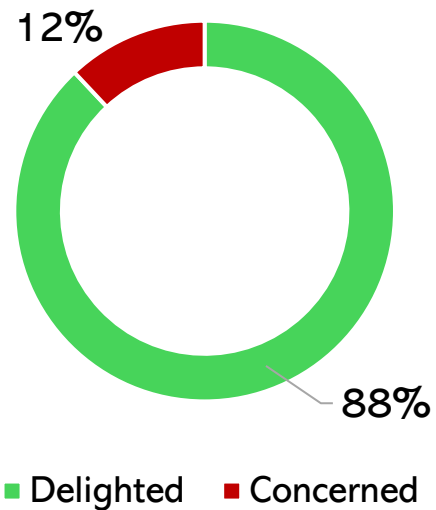


- With consumers weighing experience (post-purchase) driven factors over specifications (sales triggers), they are happy in retaining their smartphones for longer tenure.
- After the advent of affordable 4G smartphones consumers started frequently replacing their phones. In 2016, it hit the lowest when many consumers were replacing smartphones in just 9-12 months.
- After 2018, the usage tenure has been increasing steadily. The covid-19 factor also added to the extended usage of smartphones.

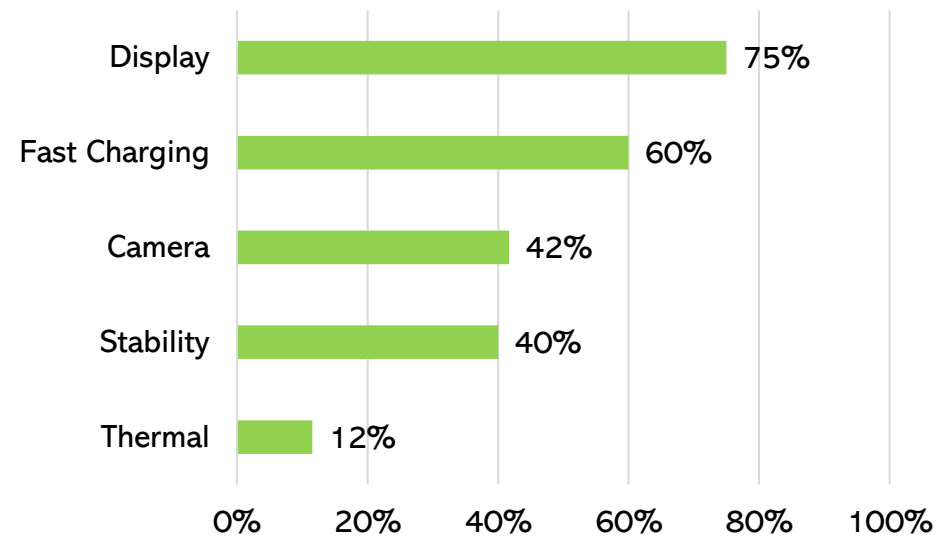
In 2024, the usage tenure has gone up to 3.5 years. With consumers continuing to buy pricier smartphones along with durability and longevity of smartphones improving due to the hardware quality and regular software updates, it is expected to be 4 years in 2025 and beyond.

Old smartphones still add to delight

Smartphone performance after 3 years of usage



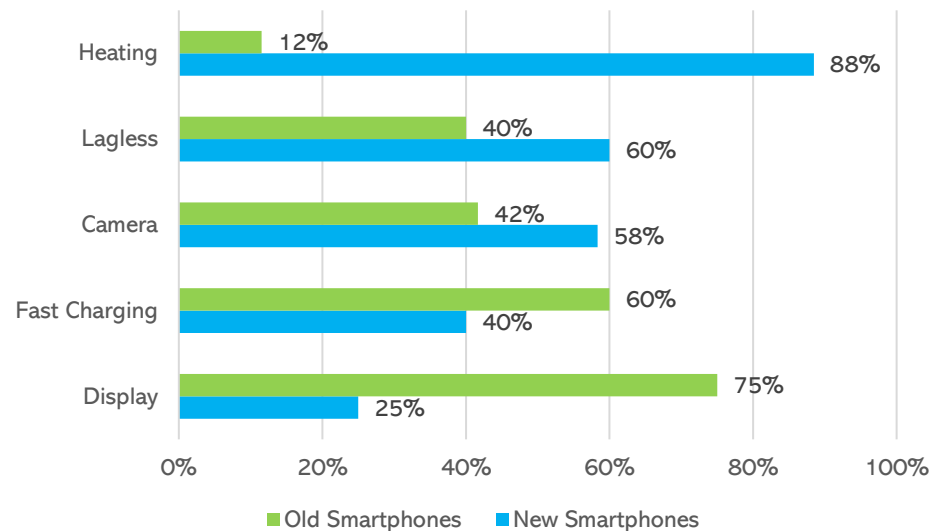
Top 5 delight factors of old smartphones (non-software)



88% of users with their current device older than 3 years are still satisfied with their smartphone performance. Other than many features they continue to be happy with, **71%** of these consumers also find software as a key reason resulting in this experience. The users find their smartphones receiving regular software updates that keep them high on performance.

New smartphones versus old smartphones

Smartphone performance – New vs Old models



- New smartphones (2024 models) have significantly better score on factors defining experience compared to old smartphones (2021 models).
- Customers are delighted exceedingly high on factors like heating and lag-less experiences.
- Experiences that are still defined by the specifications like display and fast charging see a dip in satisfaction levels in new models versus the old smartphones.

With the performances improving across the factors that are cornerstone to defining the smartphone experiences, customers will tend to extend the smartphone tenure. This means that durability and longevity of the smartphones of future become critical towards adding the delight factor. If a smartphone can offer these to consumers, they won't replace their smartphones frequently.

Replaceable and Upgradable Durability

Replaceable Durability

These include elements which define durability but are susceptible to damage / wear-n-tear or breakages. The durability can be regained after replacing the specific part of a smartphone.

Examples

- Display
- Battery
- Mic / USB port, etc.

Upgradable Durability

This set of elements 'grow' with the passage of time through regular updates and upgrade. They refine the optimisation of a device or add to its functions including introduction of new features and support for new hardware and applications.

Examples

- Operating System
- UI
- Security patch

- Consumers are increasingly interested to know about the durability and longevity that a smartphone offers. **37%** of prospect buyers inquire about the number of years for which an OEM will offer the OS upgrades before deciding a purchase.
- **63%** of smartphone users find it display replacement costly. **74%** of the smartphone users find any kind of repairing tedious and causing interruption in usage.

Longevity not at the cost of Performance drop

- Performance as defined by the processor ranks **3rd** in the list of customer delight factors. Consumers would continue their existing smartphones if performance does not drop with the passage of time. **31%** of the customers believe regular software updates result in consistent or improved performance of a smartphone.
- **43%** consumers consider key applications like gaming, watching OTT videos and similar apps as resource guzzlers testing all the capabilities including efficiency, battery size & optimisation, and heat dissipation in a smartphone.
- **25%** of the smartphone users have found the battery life improving after updating their smartphones with the latest OS update. This gives them more time to use their smartphone for the same battery capacity.

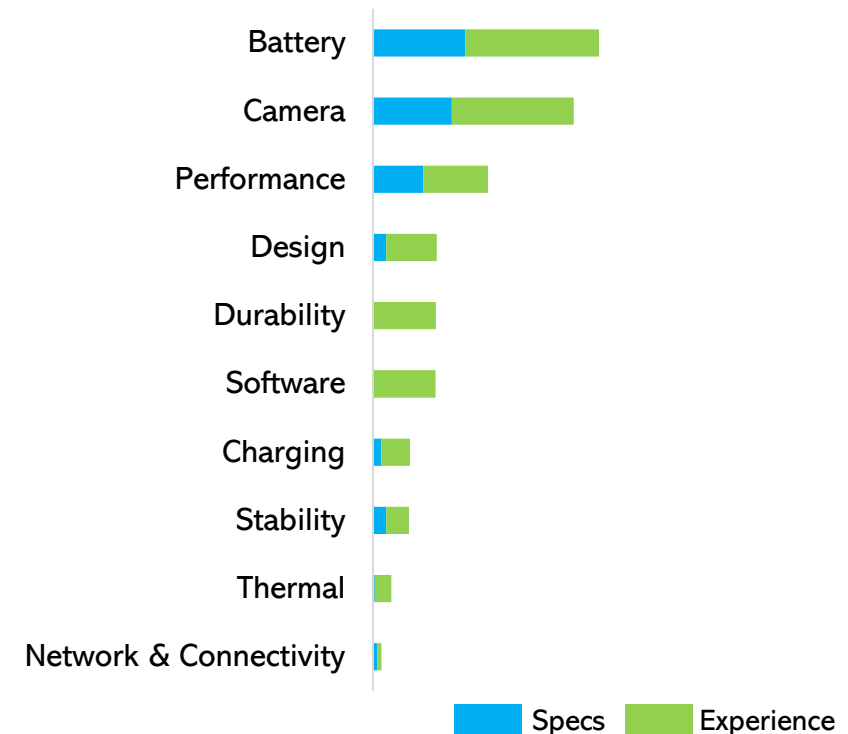
Model	Performance Rank	AnTuTu Score	AnTuTu Score Rank
A	1	745060	2
B	2	557775	5
C	3	478897	8
D	4	823383	1
E	5	511918	7
F	6	671758	4
G	7	706440	3
H	8	538911	6
I	9	477462	9
J	10	435300	10

- However, it's not necessary processors with high AnTuTu scores result in higher performance satisfaction as per consumers. The above table exhibits performance rank versus AnTuTu score of 10 smartphone models from the segment showing no relation between the two.

AI is yet to feature as a delight factor

- Undoubtedly, AI has generated interest among smartphone users, who are exploring how it can add value to their lives. AI is still not a factor that highly delights smartphone consumers.
- There are **7%** of consumers who expect AI to play role in camera functions. Being at a nascent stage, the AI features are still expected to continue as 'nice-to-have' features without having much impact on the decision criteria of buyers.
- Some consumers (**13%**) also feel that there exist many other alternatives which can help them achieve the same results, without their smartphone requiring any AI feature in them.

Top 10 factors determining smartphone delight



Research methodology

- A list of smartphone models – old and new was randomly selected in the mid price range of smartphones.
- Using Techarc's proprietary **InfiSights** tool, reviews, ratings and questions on leading marketplaces like Amazon and Flipkart were captured for further analysis.
- The delight factors, rated 4 & 5 by customers and concern areas, rated 1 & 2 were identified.
- The reviews and questions against these were themed using machine learning and AI algorithms.
- The thematic content analysis helped in categorising reviews and questions as **specifications** based or **experience** based.
- The data was further analysed to generate insights explained in this report.
- Some data points were picked up from recent consumer surveys done by Techarc.
- A total of **150,000+** reviews and questions were analysed during this research. This means the survey findings are basis the opinions and feedback of over 150k smartphone consumers.

Smartphone models covered in this research

New Smartphone Models (32)

Motorola Edge 50	Samsung Galaxy F55	Realme 13+	Realme 12 Pro+
Honor 200	Honor X9b	Infinix GT 20 Pro	iQOO Z9s Pro
iQOO Neo9 Pro	Motorola Edge 50 Fusion	Motorola Edge 50 Neo	Motorola Edge 50 Pro
Nothing Phone (2a) Plus	Nothing Phone (2a)	OnePlus Nord CE4	OnePlus Nord 4
OPPO F27 Pro+	Oppo Reno 12	POCO F6	Realme GT 6T
Redmi Note 13 Pro	Redmi Note 13 Pro+	Samsung Galaxy A35	Samsung Galaxy A55
Tecno Camon 30	Vivo V40	Vivo T3 Ultra	Vivo V40e
Realme P2 Pro	Samsung Galaxy S23 FE	OnePlus 12R	Lava Agni 3

Old Smartphone Models (30)

iQOO Neo 5	iQOO Z5	Motorola Edge 20	Motorola Edge 20 Fusion
Motorola Edge 20 Pro	OnePlus Nord	OnePlus Nord 2	OnePlus 9R
Oppo Reno 6	Oppo Reno 7	Poco X3 Pro	Poco F3 GT
Realme 7	Realme 7 Pro	Realme 8	Realme 8 Pro
Realme GT	Realme XT	Redmi Note 9	Redmi Note 9 Pro
Redmi Note 9 Pro Max	Redmi Note 10	Redmi Note 10 Pro	Redmi Note 10 Pro Max
Samsung Galaxy A32	Samsung Galaxy F42	Samsung Galaxy A52	Vivo Y21
Vivo Y20	Vivo V20		

62 smartphone models were covered in this research. These models were divided in two groups – New smartphone models that were launched in 2024 and old smartphone models which were launched in 2021 or earlier.



Thank You

For any clarifications or queries on this research report, please email to info@techarc.net.
