

Insight Highlights

Smartphones: OEM market shares and evolution of consumer behaviour, Q3 2024

DATE

September 2024

GSMA

The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry, and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Services and Solutions, and Outreach. This activity includes advancing policy, tackling today's biggest societal challenges, underpinning the technology and interoperability that make mobile work, and providing the world's largest platform to convene the mobile ecosystem at the MWC and M360 series of events.

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GSMA Intelligence

GSMA Intelligence is the definitive source of global mobile operator data, analysis and forecasts, and publisher of authoritative industry reports and research. Our data covers every operator group, network and MVNO in every country worldwide – from Afghanistan to Zimbabwe. It is the most accurate and complete set of industry metrics available, comprising tens of millions of individual data points, updated daily.

GSMA Intelligence is relied on by leading operators, vendors, regulators, financial institutions and third-party industry players, to support strategic decision-making and long-term investment planning. The data is used as an industry reference point and is frequently cited by the media and by the industry itself.

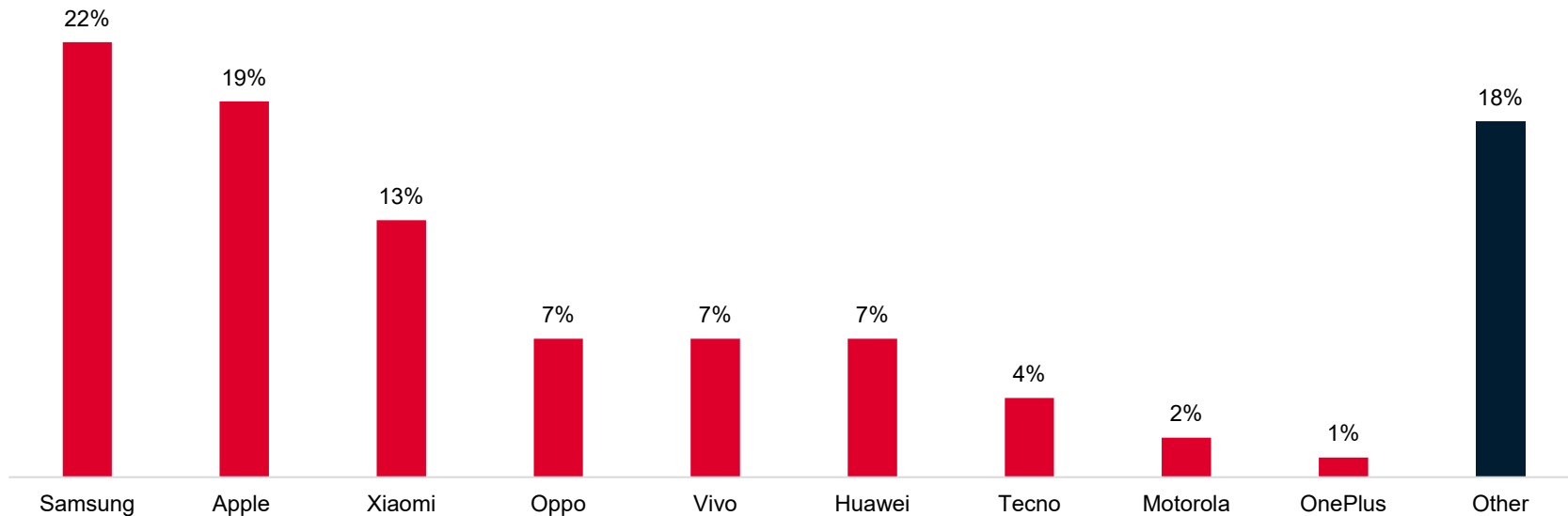
Our team of analysts and experts produce regular thought-leading research reports across a range of industry topics.

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OEMs: smartphone market shares globally

OEM smartphone market shares globally



Note: Top OEMs with a market share above 0.5%

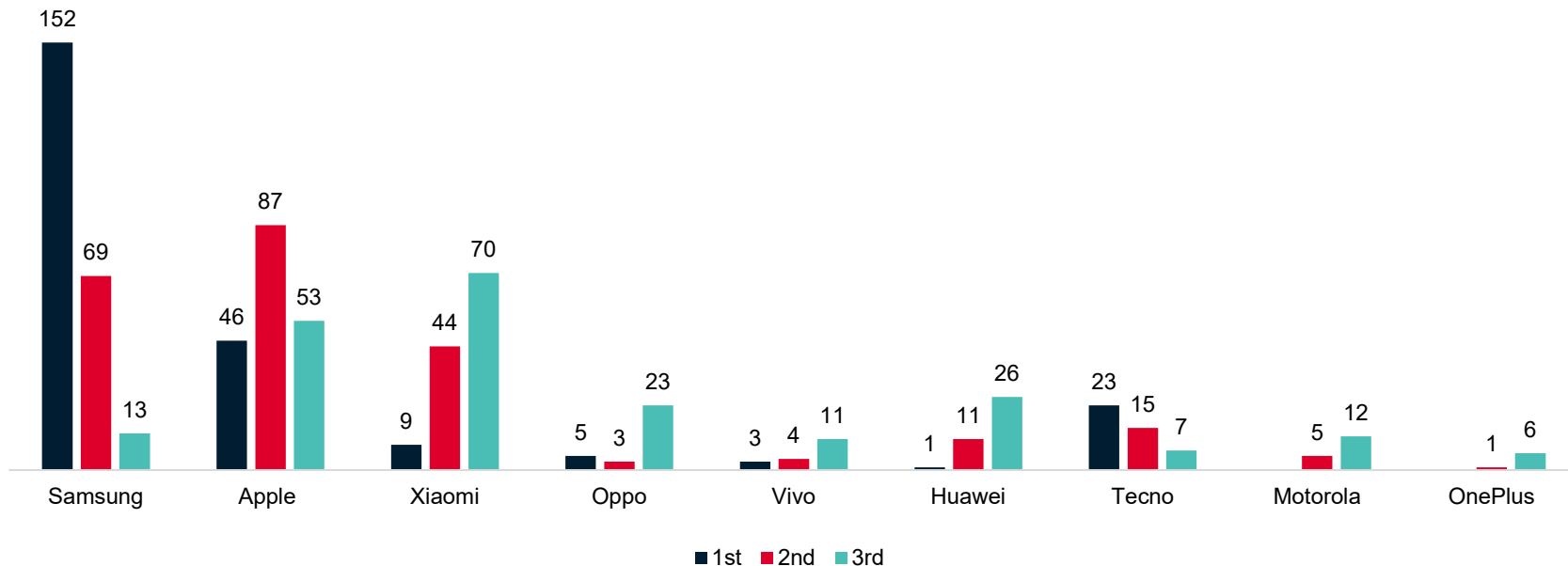
Data correct to May 2024

Source: GSMA Intelligence

OEMs: leaders, followers and challengers

OEM market position

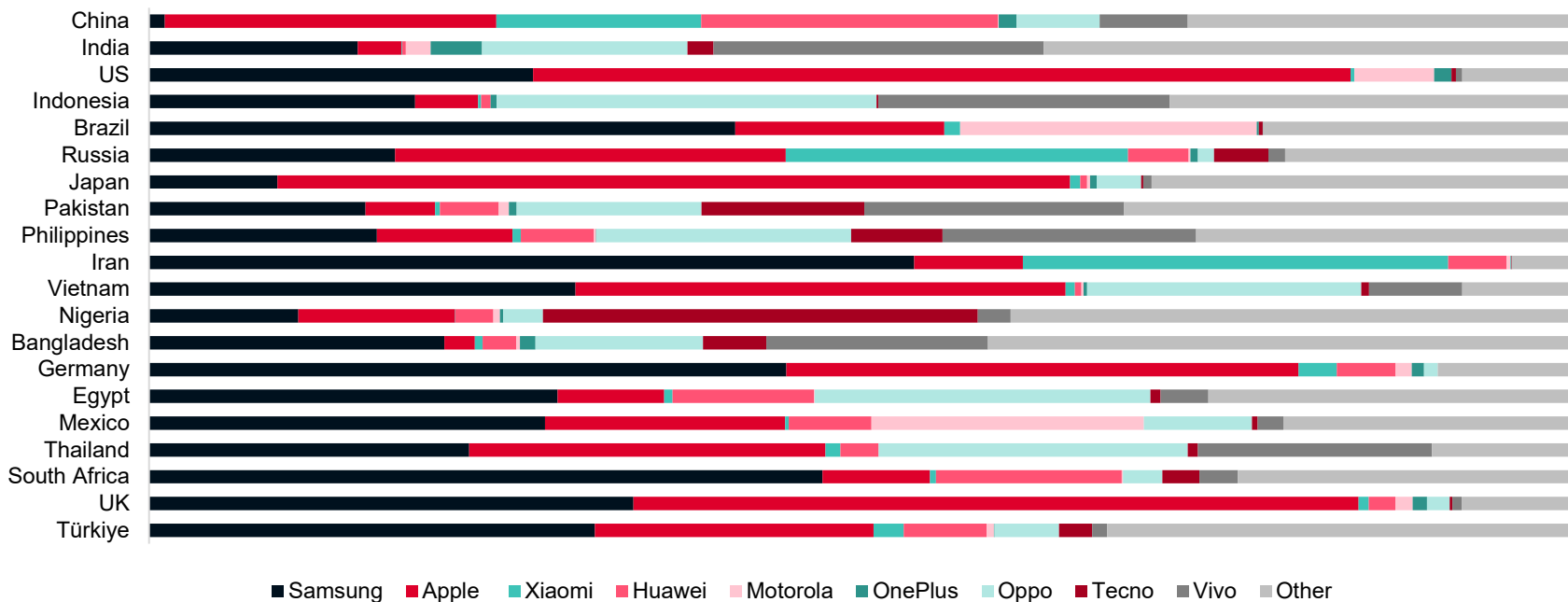
Figures represent the number of countries where each OEM occupies the first, second or third place in terms of smartphone market share



Data correct to May 2024
Source: GSMA Intelligence

Top 20 countries by number of smartphone connections

OEM market share



Data correct to May 2024
Source: GSMA Intelligence

Consumer behaviour for smartphones: six numbers to note

90%

of smartphone users will be replacing their smartphones. Of these, 28% will do so within the next year and 59% will do so within the next two years.

74%

of smartphone users who will be replacing their smartphones are likely to stick with their current smartphone brand when purchasing their new smartphone.

38%

of smartphone users who expect to replace their smartphone said they would make their next purchase through operator sales channels, followed by OEMs (28%) and other retailers (24%).

The top five

most important smartphone features driving consumers when purchasing their next smartphone are battery life, durability, security of data, cost and camera quality.

76%

of smartphone users consume digital entertainment services (including free/paid-for video, music and games) on a weekly basis.

37%

of smartphone users who expect to replace their smartphone said they would consider purchasing a preowned, refurbished smartphone.

Note: Aggregate figures across the eight countries surveyed (China, France, Germany, Italy, Japan, South Korea, the UK and the US)

Source: GSMA Intelligence Consumers in Focus Survey December 2023

Access GSMA Intelligence content on the state of the smartphone market and its outlook

GSMA Intelligence regularly analyses the smartphone market across multiple areas, including smartphone adoption, technology advancements, competitive dynamics and consumer behaviour. The content is part of GSMA Intelligence Digital Consumer module, which provides exclusive data and research on the transformation of consumer technologies and evolution of consumer behaviour in the digital era. The module covers important areas including 5G, devices, gaming, extended reality (XR), consumer AI, the metaverse and eSIM.

Data

GSMA Intelligence provides data on a range of smartphone metrics, including:

- smartphone connections and adoption
- OEM smartphone market shares
- adoption of 5G and eSIM.

It also conducts an annual consumer survey across major developed countries to gain insights on how consumer behaviour for devices is changing across areas such as smartphone replacement rates, preferred sales location, purchase drivers, brand loyalty, reasons for switching operator, frequency of use of digital services such as video and gaming, and ownership of mobile devices beyond smartphones.

Research

Each year, GSMA Intelligence releases more than 40 publications for the module, including reports, dashboards and case studies, helping customers make stronger business decisions. Access to GSMA Intelligence analysts is also an important part of the proposition. Reports on smartphone market trends include the following:

- [OEM smartphone market shares across the globe: leaders, followers and challengers in an increasingly competitive market](#)
- [OEMs in Focus: Smartphone Market Shares Dashboard](#)
- [Smartphone sales return to growth: four ways for OEMs to capitalise](#)
- [Generative AI for consumer use cases: the five tech areas that are seeing the most innovation](#)
- [Five years of 5G for consumers: how user behaviour and experience are changing](#)
- [eSIM in the consumer market: tracking devices and services launches, forecasting adoption through to 2030](#)
- [Refurbished smartphones: consumers look to savings over sustainability](#)
- [Future of devices: emerging trends, evolving consumer behaviour and expanding digital services](#)

How to gain access

The GSMA Intelligence Digital Consumer module is one of the five available to customers. If you already subscribe to the module, you can access a range of data and reports on the smartphone market.

If you don't have a subscription, or if you cannot access some of the content, please contact our account managers to learn more.

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