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Later iPhone X Release Hurts Apple Share

Chinese Challengers Squeezed Out in Home Market

London, Dec 5, 2017 – The latest smartphone OS data from Kantar Worldpanel ComTech reveals that in the three months ending October 2017, iOS share fell in key markets, making clear the impact of the flagship iPhone X not being available to buy in the month of October. And, as Windows continued to drop in share, Android was able to gain 4.3 percentage points in the big five European markets, 8.2% in the USA, and 7.5% in Japan. Urban China remained a bright spot for Apple, with its share edging up 0.5% in the latest three months to reach 17.4%.

“It was somewhat inevitable that Apple would see volume share fall once we had a full comparative month of sales taking into account the non-flagship iPhone 8 vs. the flagship iPhone 7 from 2016,” said Dominic Sunnebo, Global Business Unit Director for Kantar Worldpanel ComTech. “This decrease is significant and puts pressure on the iPhone X to perform. Considering the complete overhaul that the iPhone X offers, consumers may be postponing their purchase decisions until they can test the iPhone X and decide whether the higher price, compared to the iPhone 8, is worth the premium to them.”

“As of October 2017, 35.3% of Apple’s installed base customers across Europe and the USA had owned their iPhones for more than two years – up from 30.1% a year earlier and signifying considerable pent-up demand within Apple’s base. In pure value terms, it is likely the iPhone X average selling price will more than make up for a dip in sales of older iPhone models,” Sunnebo added.

Urban China, a market once overrun with new challengers, is maturing, with the top five players all posting strong growth and the long tail of challenger brands falling away rapidly. In the three months ending in October 2017, the top five brands – Huawei, Xiaomo, Apple, Vivo, and Oppo – made up 91% of sales, compared to 79% a year earlier.

“Chinese brands like Meizu, LeTV, Coolpad, ZTE, and Lenovo were once on the same trajectory as like like of Xiaomi, but any momentum they once had has abruptly stopped, with many struggling to get past a 1% share,” Sunnebo said. “Samsung’s performance in China continues to deteriorate, with its share now down to just 2.2% of that market.”

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Note: The Kantar Worldpanel ComTech dataviz can be embedded into online articles for a visual representation of Kantar Worldpanel ComTech Smartphone OS market share data. Click here to copy the embed code.

Smartphone OS Sales Share (%)

Germany	3 m/e Oct '16	3 m/e Oct '17	% pt. Change
Android	80.7	83.2	2.5
iOS	16.4	14.9	-1.6
Windows	2.4	1.3	-1.1
Other	0.4	0.6	0.2

GB	3 m/e Oct '16	3 m/e Oct '17	% pt. Change
Android	54.5	64.9	10.4
iOS	42.4	33.9	-8.5
Windows	3.2	1.1	-2.1
Other	0	0.2	0.2

France	3 m/e Oct '16	3 m/e Oct '17	% pt. Change
Android	73.5	78.4	4.9
iOS	21.2	20.6	-0.6
Windows	4.8	1	-3.9
Other	0.5	0.1	-0.4

Italy	3 m/e Oct '16	3 m/e Oct '17	% pt. Change
Android	81.4	85	3.6
iOS	13.8	13.3	-0.5
Windows	4.3	1.7	-2.6
Other	0.5	0	-0.5

Spain	3 m/e Oct '16	3 m/e Oct '17	% pt. Change
Android	91.7	87.7	-4.1
iOS	7.9	12.3	4.4
Windows	0.3	0	-0.3
Other	0	0	0

USA	3 m/e Oct '16	3 m/e Oct '17	% pt. Change
Android	58	66.2	8.2
iOS	40.6	32.9	-7.6
Windows	1.2	0.5	-0.7
Other	0.2	0.4	0.1

China	3 m/e Oct '16	3 m/e Oct '17	% pt. Change
Android	82.9	82.3	-0.5
iOS	16.9	17.4	0.5
Windows	0.1	0.3	0.1
Other	0.2	0.1	-0.1

Australia	3 m/e Oct '16	3 m/e Oct '17	% pt. Change
Android	55.7	60.3	4.6
iOS	39.3	39.1	-0.2
Windows	3	0.4	-2.6
Other	2	0.1	-1.9

Japan	3 m/e Oct '16	3 m/e Oct '17	% pt. Change
Android	47.5	55	7.5
iOS	51.7	44.8	-6.9
Windows	0.2	0.1	-0.1
Other	0.6	0.1	-0.5

EU5	3 m/e Oct '16	3 m/e Oct '17	% pt. Change
Android	75.4	79.7	4.3
iOS	21.1	19	-2.1
Windows	3.2	1.1	-2.1
Other	0.3	0.2	-0.1

About Kantar Worldpanel ComTech's Smartphone OS Market Share Data

Kantar Worldpanel ComTech's smartphone OS market share data provides the media and businesses with access to the most up-to-date sales and market share figures for the major smartphone operating systems.

This information is based on research extracted from the Kantar Worldpanel ComTech global consumer panel. ComTech is the largest continuous consumer research mobile phone tracking panel of its kind in the world, conducting over one million interviews per year in Europe alone. ComTech tracks mobile phone behavior – including phone purchases, bills/airtime, source of purchase, and usage. It also delivers additional data to promote an understanding of the drivers of share changes, and consumer insight market dynamics. All consumer data in this release excludes enterprise sales.

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Through continuous monitoring, advanced analytics, and tailored solutions, Kantar Worldpanel inspires successful decisions by brand owners, retailers, market analysts, and government organisations globally.

With over 60 years' experience, a team of 3,500, and services covering 60 countries directly or through partners, Kantar Worldpanel turns purchase behaviour into competitive advantage in markets as diverse as FMCG, impulse products, fashion, baby, telecommunications, and entertainment, among many others.

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