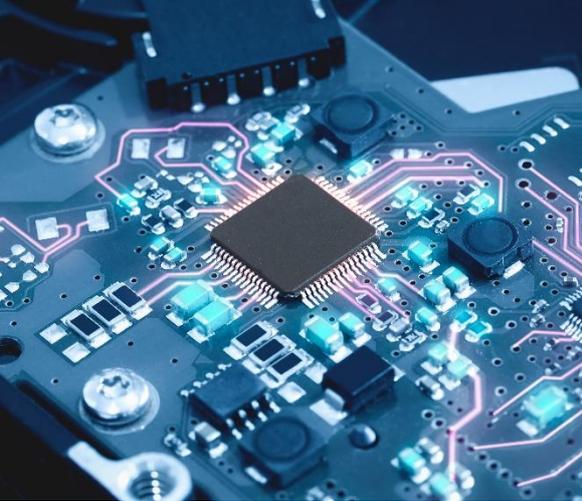


Technology Research

US Smartphone Trends: The Stats on Specs



This note covers research we have provided for clients over the past two months from our US Online-Offline Monthly Channel Tracker service.

If you would like more information on the opinions and data expressed here, please get in touch with us at PR@counterpointresearch.com.

You can find more of our technology research and insights [here](#).

9/4/2021

US Smartphone Trends: The Stats on Specs

The US smartphone market last year was challenging. The first half saw a YoY decline of over 20% and despite a stronger than expected rebound, the year ended 15% down in terms of sales.

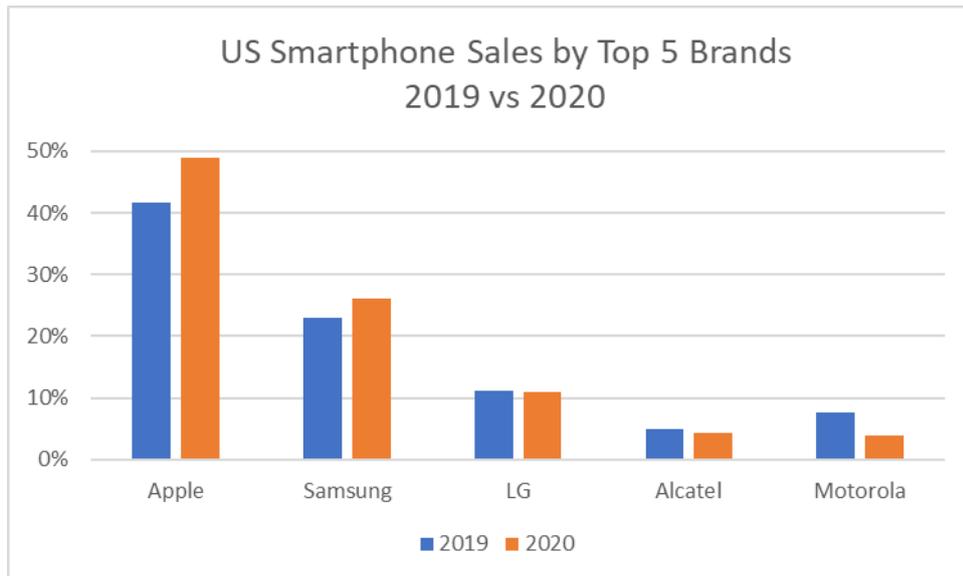
However, the market continues to evolve and is recovering, with Q3 and Q4 helping close the gap with 2019. This is apparent not just from record iPhone sales and a stronger than expected February for the Galaxy S21, but also from the evolution of smartphone features – which continue to get bigger, better, faster and more powerful.

In this note, we compare how specs have changed from 2019 to 2020, providing commentary on key trends and what to expect for 2021.

We look at:

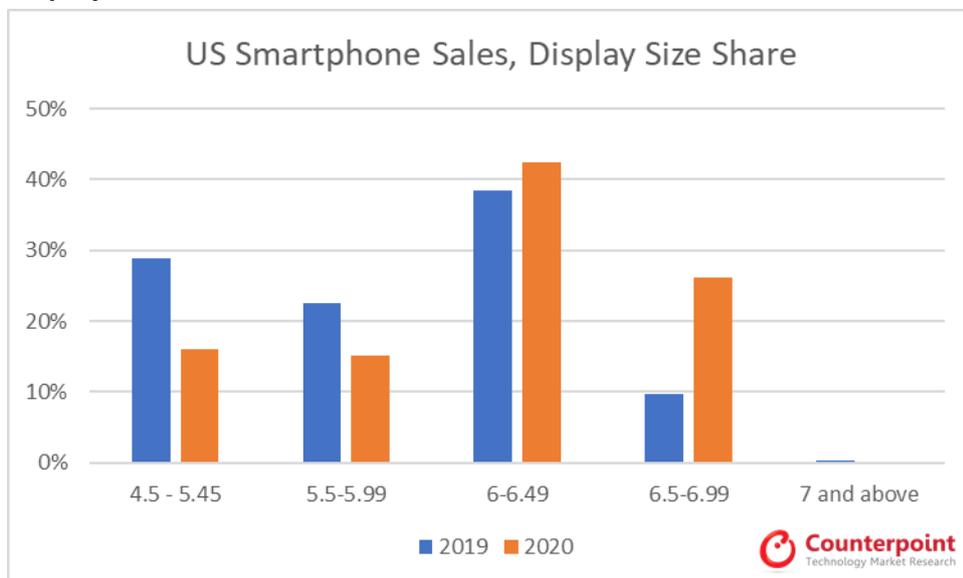
- Overall sell-through by key brands
- Display size
- Main camera MP
- Selfie MP
- NAND and RAM
- Battery size
- Chipset vendors

Total Smartphone Sell-through



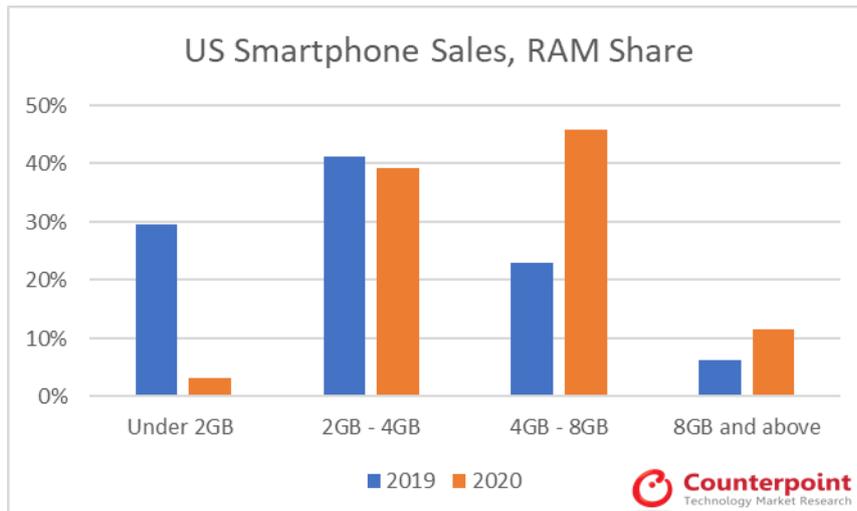
- Overall market declined 15% annually; big share gainer was Apple (14%), then Samsung (5%).
- The iPhone 12 and 12 Pro Max were stellar. Galaxy SE20 FE 5G was Q4 under-\$1000 top-seller.
- LG struggled as it began pulling marketing money and missed launch windows at carriers and national retail.
- Alcatel, Motorola, others like Coolpad saw losses with weakness in prepaid.
- **Trending:** 2021 first two months slightly down (short Feb), but Samsung Galaxy S21 first full month performed well relative to S20. We expect prepaid sales to gain strength (LG and Samsung A-series especially) with promotions and tax season timing.

Display Sizes



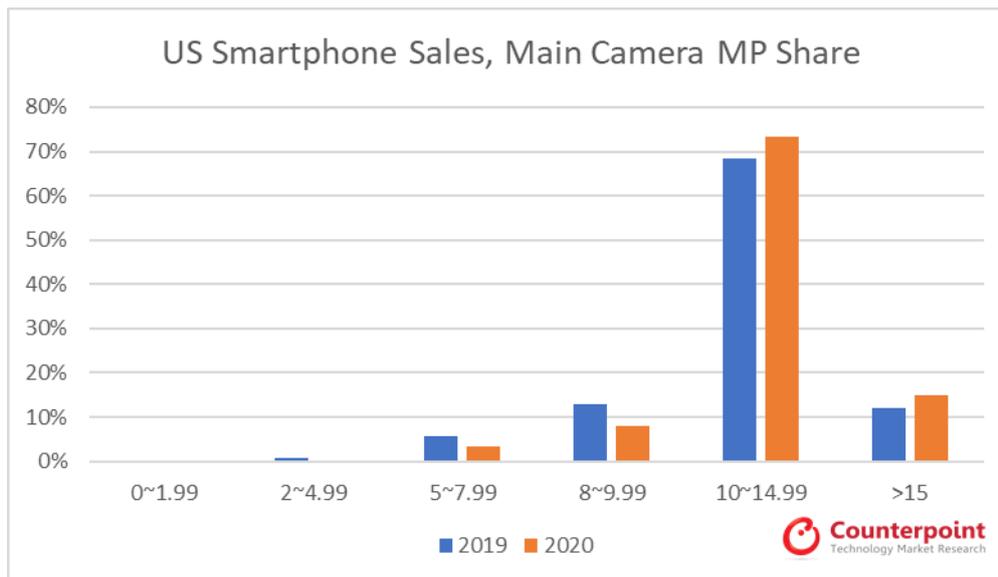
- Bigger is better, with huge jump in extra large displays.
- Apple and Samsung driving the shift, accounting for 85% of all 6.5"-6.9" smartphones shipped.
- **Trending:** Extra-large screens dominating, with preliminary Jan/Feb counts showing 6.5"-6.9" share growth continuing.

RAM



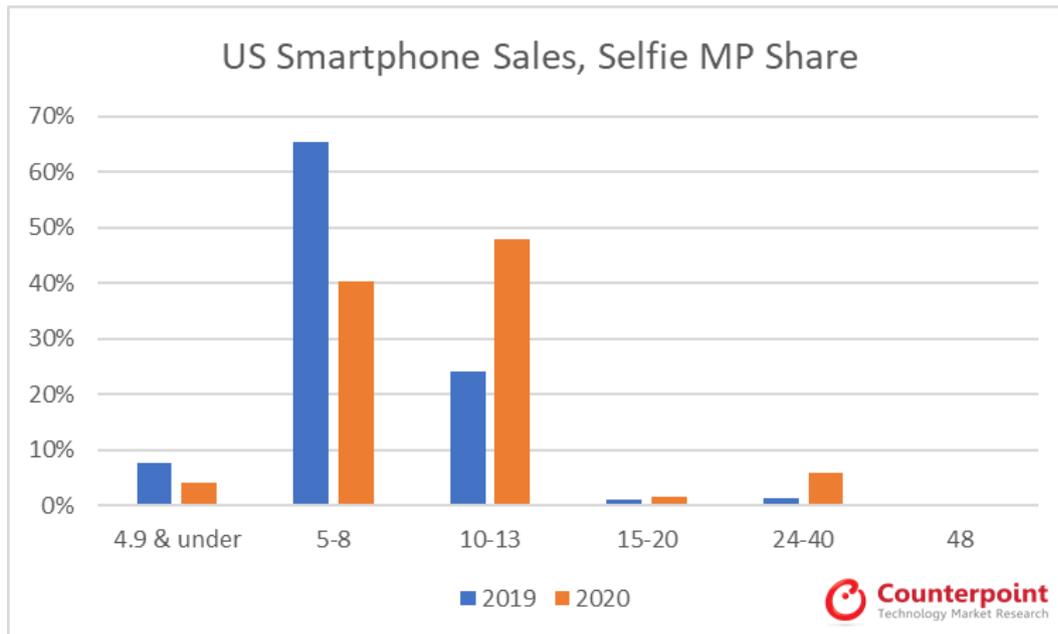
- Apple key in 4GB-8GB, and 8GB and above driven by Samsung's premium models.
- **Trending:** Major shift in RAM market share to 4GB-8GB – in 4Q we saw share hit 63%.

Main Camera MP



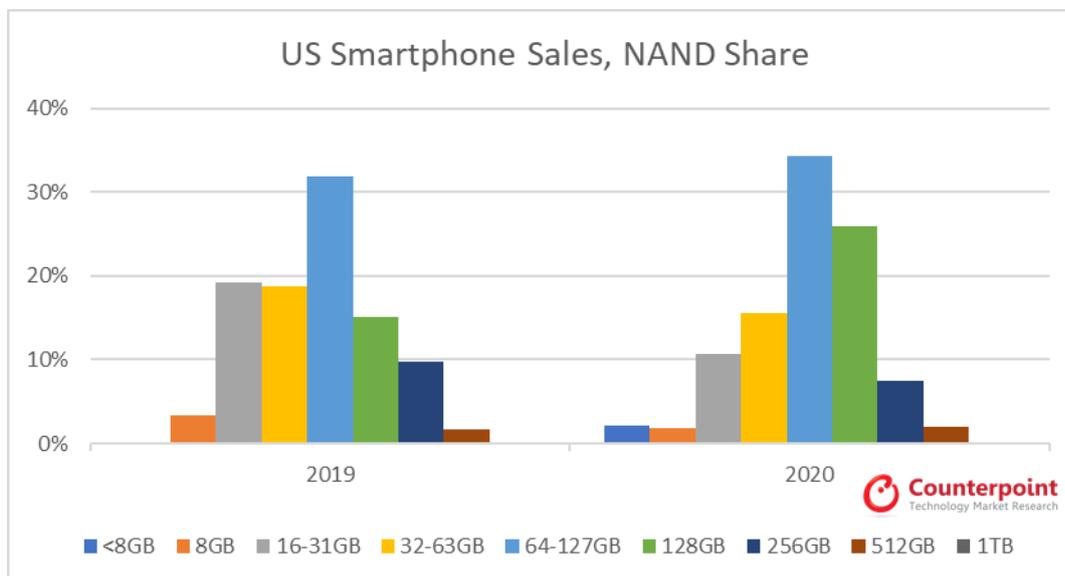
- 10MP-14.9MP showing continued strength on Samsung and Apple products. No major shifts.
- **Trending:** No surprise when with data showing drastic reduction of single rear cameras. Industry is moving to dual or higher setups. Q4 saw quad hitting nearly one-third of all phones shipped.

Selfie Camera MP



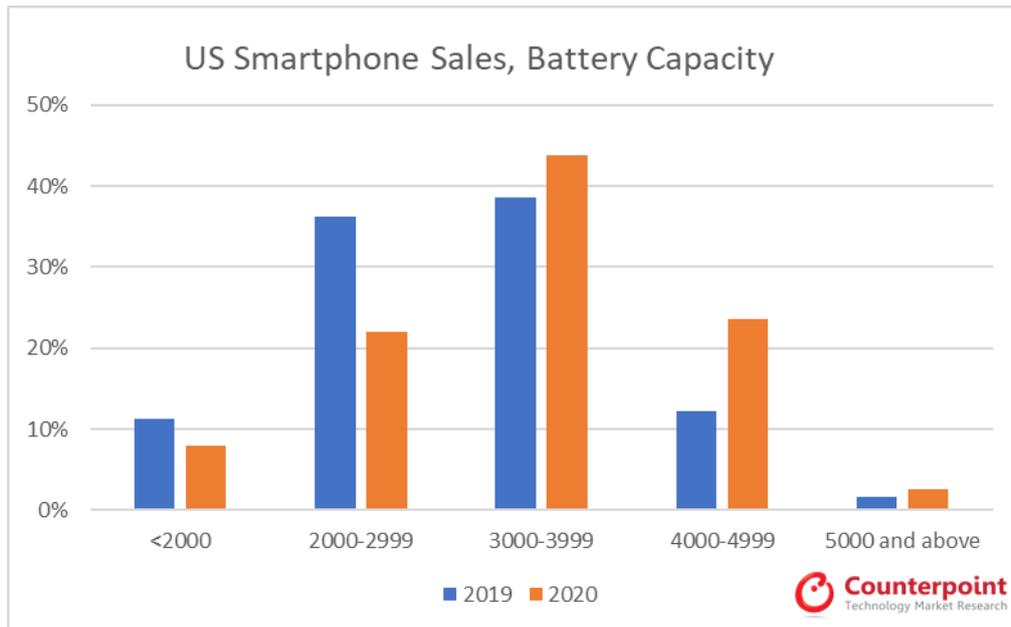
- Samsung and Apple again driving the shift up. 10MP and 12MP are now standard and we expect this to continue.
- **Trending:** Note these are 'preliminary' counts, but for Jan/Feb we're seeing two-thirds of all sales in the 10MP-13MP category.

NAND Flash



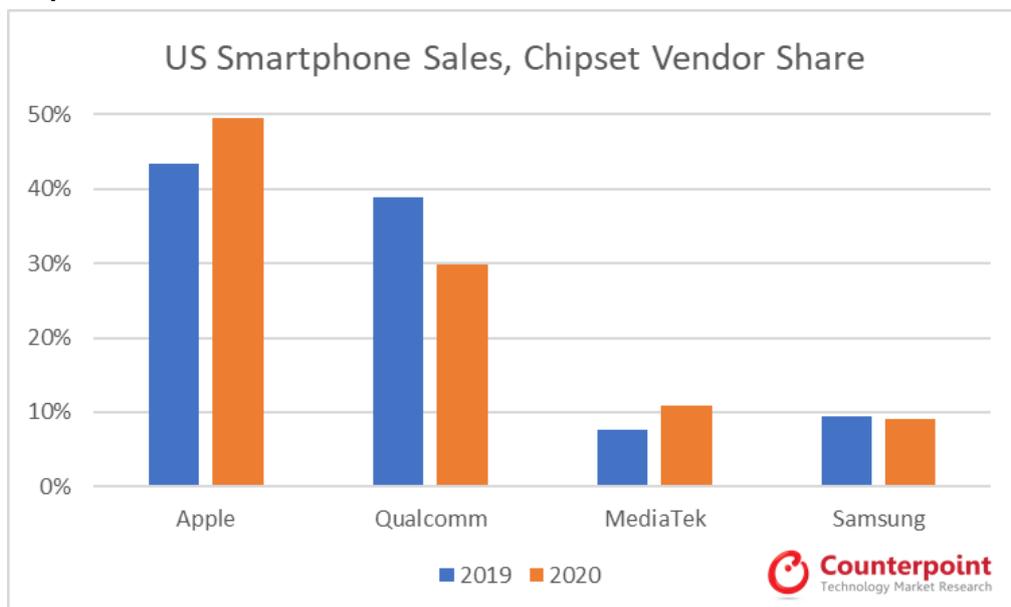
- NAND flash capacity growing in tandem with imaging. 128GB set to become standard.
- This is a key consideration amongst consumers not just in the US but globally, where average smartphone NAND flash capacity [crossed the 100GB mark last year](#).
- **Trending:** Jan/Feb initial counts have 128GB at almost half of all devices sold.

Battery Capacity



- The 4000-4999 mAh band saw the biggest gains, with Samsung enjoying the largest share.
- **Trending:** This band will continue increasing as more Androids released with this battery size to enable increased use of gaming, video calls and 5G access.

Chipset Vendor Share



- Beyond overall component shortages, big story last year in Qualcomm shipment declines. This was due to Apple dominance and some chipping away from MediaTek.
- **Trending:** So far this year we're seeing Apple silicon break 60% at the cost of all others. Again, this is just preliminary counts through February.