



SmartTech Research

RESEARCH WHITE PAPER

Foldable Smartphone Market: U.S. Consumer Survey & Strategic Intelligence

Apple's Anticipated Foldable iPhone Entry: Consumer Demand, Competitive Dynamics, and Pricing

Prepared by: SmartTech Research

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Sample: N=291

Geography: United States (all regions)

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Executive Summary

Bottom Line

1. **Strong Latent Demand: 59%** find foldables more appealing than candy-bar phones. Apple's entry is the conversion unlock the category has been waiting for — **61%** say it would boost their confidence.
2. **Apple = Category Reset:** Apple's entry could redefine consumer expectations for the segment. The product must credibly prove utility, durability, and price-value to deliver a true reset.
3. **iPhone + iPad Mini Value:** The near-term opportunity is a **premium Pro Max replacement**. **56%** find the "phone + small tablet replacement" argument convincing — the strongest purchase rationale in the data.
4. **The \$2,000+ price point is a structural barrier:** only **22%** of consumers will pay that unsubsidized. Carrier subsidy and device trade-in will be very important for driving demand.

[SmartTech Research](#) conducted a quantitative primary research study of 291 premium smartphone users geographically dispersed across the U.S. in May 2026 to assess consumer demand for foldable smartphones and the market impact from a potential foldable iPhone entry. (Note: As of this publication, Apple has not announced a foldable iPhone.)

Strategic Findings

1. **Apple Takes Share From Itself, Not Android.** 37% of iPhone Pro Max owners indicate they would buy an Apple foldable iPhone as soon as it is available. And 32% of Pro Max users are willing to pay \$2,000+. 45% of Pro Max users find a foldable phone much more appealing vs a traditional “candy bar” phone. Finally, 55% of Pro Max users (and 32% of all other iPhone users) are waiting for Apple before seriously considering a foldable iPhone – reinforcing the power of Apple’s ecosystem Continuity.
2. **The \$2,400 ASP Is a Real and Under Modeled Barrier.** Only 22% of all respondents will pay more than \$2,000 net out-of-pocket. The largest cohort (31%) clusters at \$1,500–\$2,000 —

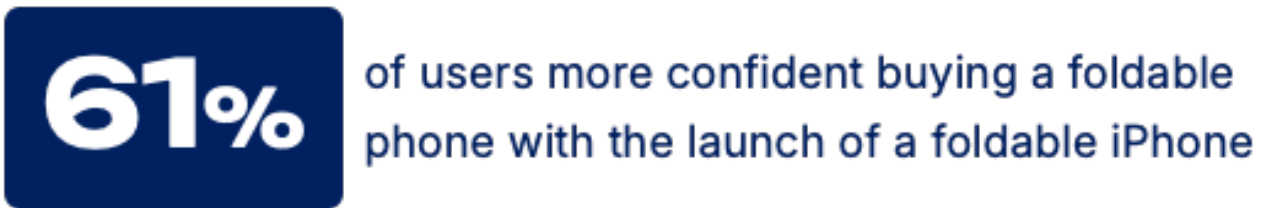
reachable only through carrier and trade-in subsidy programs. Carrier deal execution is not a marketing variable; it is the primary volume unlock.

- 3. U.S. Market Share Will Diverge Significantly from Global.** Consensus analyst models project Apple at 12–15% global foldable share in 2027. This survey suggests up to ~49% U.S. foldable share — directionally aligned with iPhone's >60% U.S. smartphone dominance.
- 4. Apple Legitimizes the Entire Foldable Category.** 61% of respondents say Apple's market entry would make them more confident buying any foldable phone — including Samsung and Google products. Apple is the category enabler, not just its own product story.

Insights Dashboard



The Structural Price Gap
With Apple's expected ASP of ~\$2,400, voluntary willingness to pay falls sharply: only **22% of all respondents** would pay \$2,000+ without a subsidy. **38%** cap at under \$1,500 and **13%** won't pay any premium at all.



Section 1: Research Overview

1.1 Background and Study Objectives

The foldable smartphone market has undergone significant evolution since the commercial launch of the Samsung Galaxy Z Fold in 2019. By 2025, the global foldable smartphone market reached an estimated 20 million units annually, with multiple Android OEMs offering both book-style and clamshell form factors. The widely anticipated entry of Apple into the foldable segment in CQ4 2026 is potentially the most significant inflection point in the category's history.

SmartTech Research designed this study to address four primary research questions ahead of Apple's expected launch:

- How open are U.S. premium smartphone consumers to foldable smartphones, and what drives or inhibits consideration?
- What specific impact would Apple's entry have on category confidence, purchase intent, and competitive dynamics?
- What is the price ceiling for foldable smartphones, and how does willingness to pay vary by device segment?
- What are the go-to-market, pricing, and product implications for Apple and the broader market?

1.2 Methodology

SmartTech Research conducted online primary research using a U.S. consumer panel managed and recruited through established market research protocols. The study was designed to reach premium smartphone owners — defined as individuals who own and actively use either an iPhone or a Samsung Galaxy device (or similar) as their primary phone.

Survey questions were structured in three phases: (1) pre-screening questions to qualify respondents and establish context; (2) core attitudinal and behavioral questions about foldable smartphones; and (3) demographic questions. The questionnaire comprised eighteen substantive questions plus demographic questions.

1.3 Sample Composition

The survey was intentionally constructed to over-index on premium smartphone owners relative to the general population. Foldable smartphones represent a premium-tier product category, and insight from budget-tier consumers would not meaningfully inform foldable market dynamics. The three primary device segments reflect the core competitive dynamics of the anticipated Apple launch.

Note: 65% of the core survey sample (N=291) uses an iPhone as their primary device (31% Pro Max, 34% any other iPhone model), consistent with iPhone's >60% share of the U.S. smartphone market (IDC, Q1 2026). The remaining 35% are Android users, representing the competitive benchmark segment.

Section 2: Topline Findings

2.1 Key Insights Summary

The study identified five high-priority insights that collectively define the strategic landscape for the foldable smartphone market in the United States:

- **Apple Could Mainstream the Category.** 33% of survey respondents say they are "waiting for Apple" before seriously considering a foldable. Only 26% would consider purchasing a Samsung, Google, or other brand's foldable today. Apple's anticipated entry will unlock a significant frozen demand segment — a cohort that currently represents the largest single consumer group in the study.
- **Demand Is Strongest Among iPhone Pro Max Users.** 66% are open or very open to a foldable smartphone, 70% say foldables are more appealing than traditional candy-bar phones, and 84% would at least consider a foldable iPhone. This represents Apple's primary demand engine for Year 1 — the high-intent, high-purchasing-power upgrade cohort.
- **The Winning Use Case Is Bigger-Screen Utility, Not Innovation.** Top drivers of foldable interest are entertainment and video (51%), multitasking between apps (47%), and reading documents and news (39%). Only 3% cite "future-forward" design as their primary interest. Product messaging should lead with "iPhone + iPad mini in your pocket," not innovation narratives.
- **Price and Durability Are the Gating Issues.** The top three purchase barriers are high price (cited by 28–31% across segments), durability concerns about hinge mechanics and crease (cited by 15–32%), and Apple ecosystem lock-in (cited by 15–28%). Apple's entry eliminates the third barrier for its own user base. The first two require solutions: carrier subsidies for price, and proven product quality for durability.
- **The Price Ceiling Is Real and Constraining.** 38% cap willingness to pay at below \$1,500, and 13% will not pay any premium over a traditional smartphone. Only 22% are comfortable paying \$2,000 or more unsubsidized — directly below IDC's estimated \$2,400 Apple launch ASP. Carrier financing programs are not optional; they are the mechanism by which Apple reaches its addressable market.

Section 3: Market Readiness & Purchase Intent

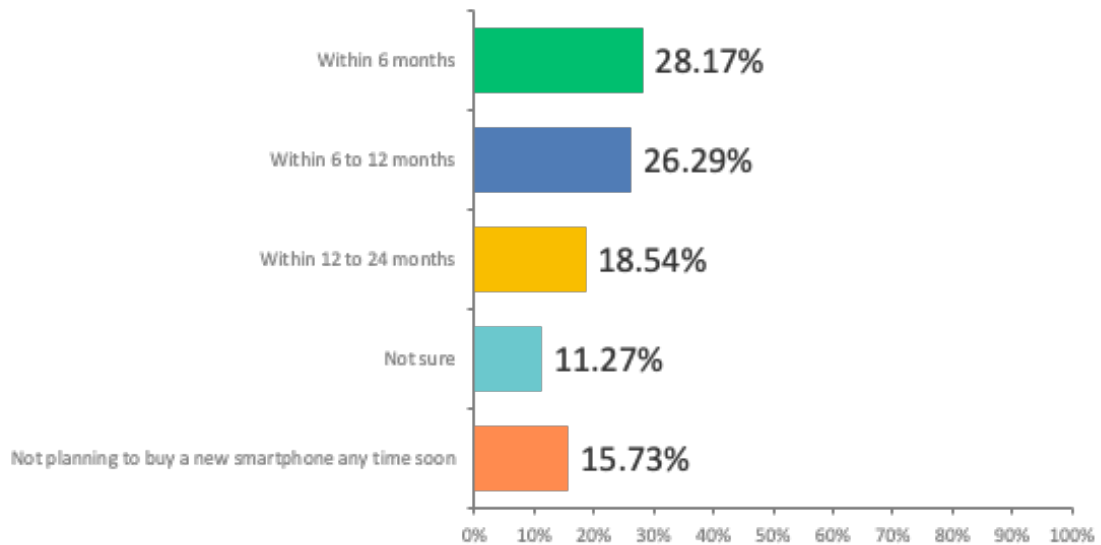
3.1 Smartphone Purchase Timeline

(Survey Question 1 — Pre-Screen, N=531)

The pre-screen purchase timeline question was fielded to 531 respondents before qualification filtering. Results show a broad and active upgrade pool that directly overlaps with Apple's anticipated CQ4 2026 launch window.

Q1: When are you likely to buy a new smartphone?

Answered: 531 Skipped: 0

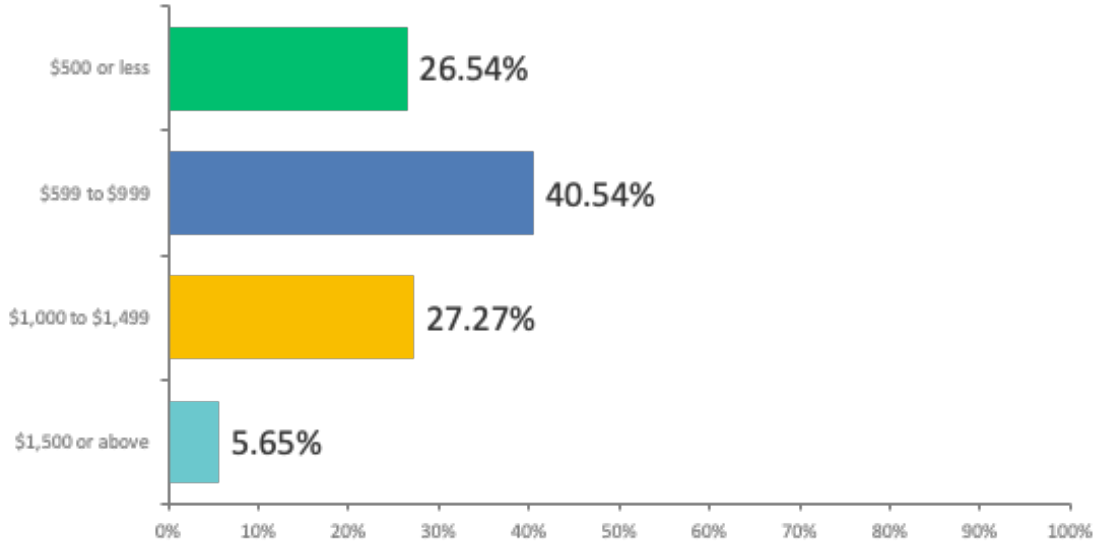


Key finding: 49% of respondents plan to purchase a new smartphone within 12 months. Apple's CQ4 2026 launch lands squarely within this high-intent window, creating a concentrated demand opportunity for an Apple foldable entry.

We also asked these users what they plan to pay for their next smartphone purchase and what phone they currently use.

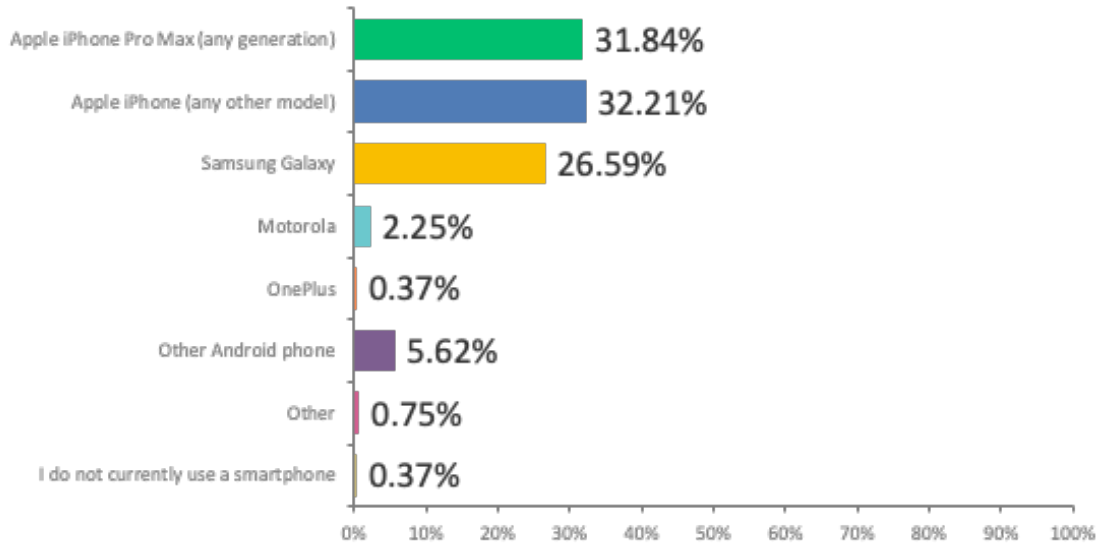
Q2: What do you expect to pay on your next smartphone?

Answered: 407 Skipped: 19



Q3: Which smartphone brand do you currently use as your primary phone?

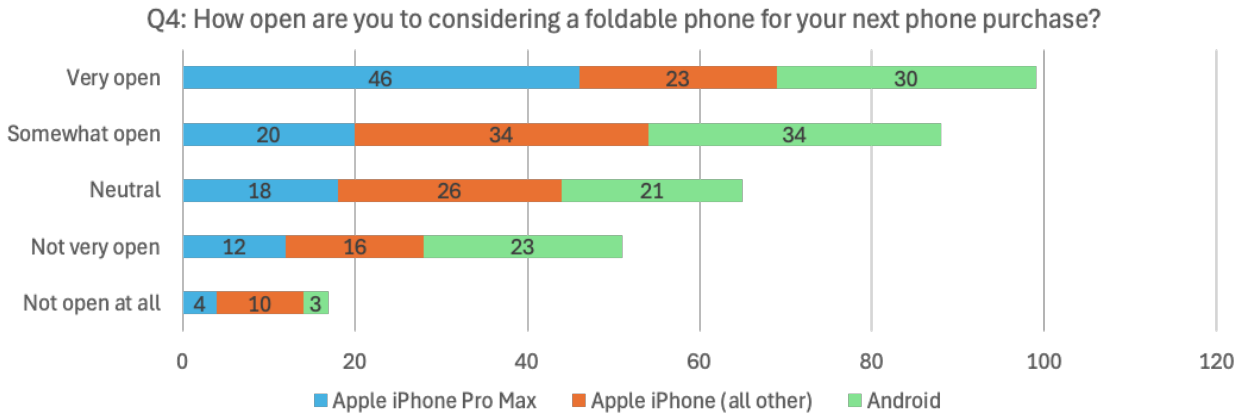
Answered: 267 Skipped: 159



3.2 Openness to Foldable Smartphones

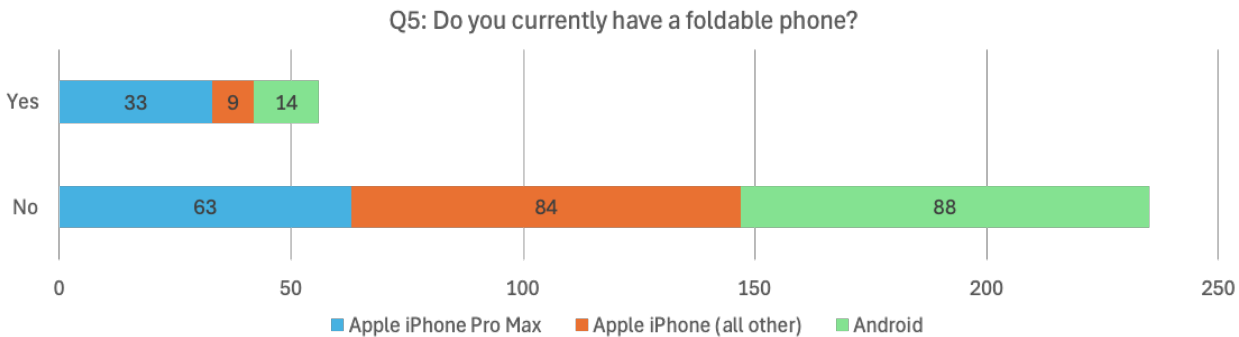
(Survey Question 4, N=320)

When asked how open they are to considering a foldable smartphone as their next device, significant variation emerged across device segments. iPhone Pro Max owners are dramatically more open than other segments.



The 46% "Very Open" rate among iPhone Pro Max owners is more than double the rate for all other iPhone users (21%) and significantly above Android users (27%). **The Pro Max segment represents Apple's clearest and most concentrated early-adopter conversion pool.**

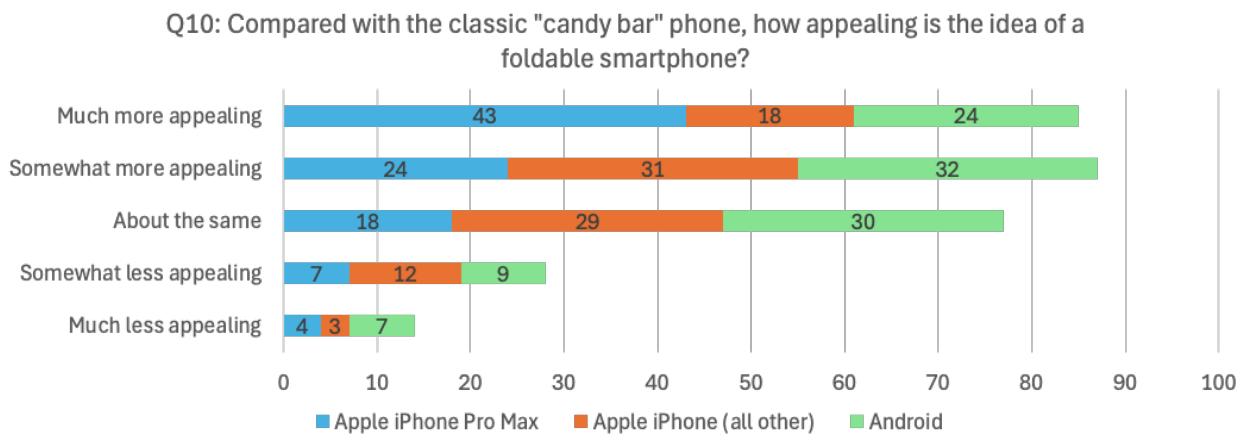
Notably, as shown in the following chart, 34% of iPhone Pro Max survey respondents already own a foldable smartphone — in virtually every case an Android device — confirming that this group has already crossed the category barrier. The sole remaining friction for these consumers is the Apple ecosystem barrier, which dissolves upon Apple's entry.



3.3 Foldable Appeal vs. Traditional Smartphones

(Survey Question 10, N=291)

59% of all respondents find a foldable smartphone more appealing than a traditional candy-bar phone. **Among iPhone Pro Max users, this climbs to 70% — with 45% saying "much more appealing,"** nearly double the rate seen in other iPhone (17%) and Android (24%) segments.

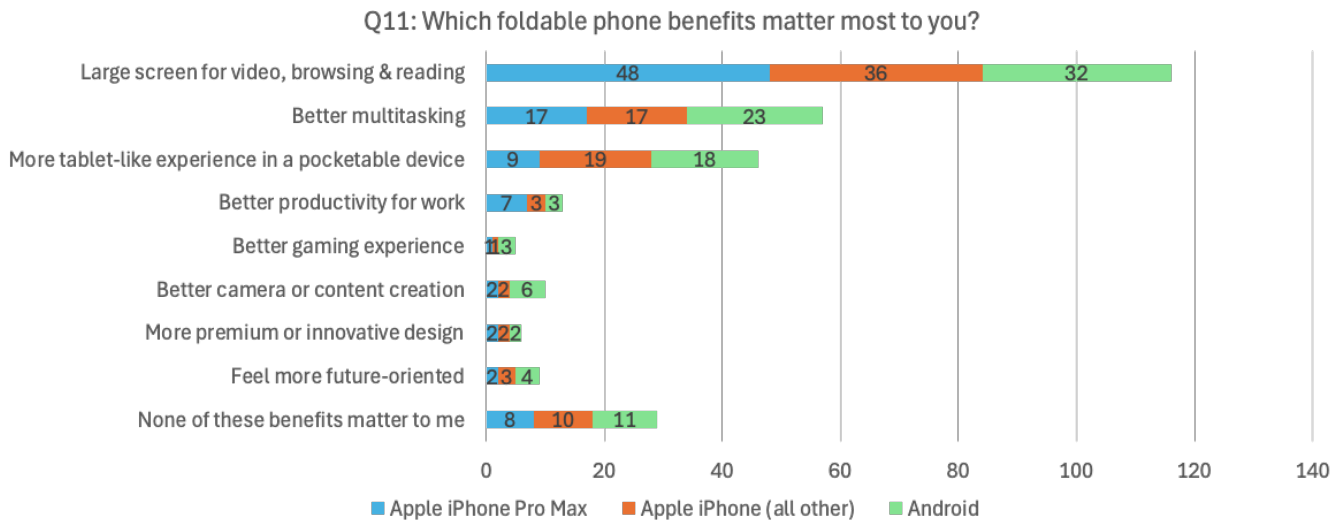


Section 4: Drivers & Barriers to Foldable Adoption

4.1 Benefits That Drive Consideration

(Survey Question 11, N=291)

The #1 driver of foldable interest is practical screen utility — not technology or design. This has direct implications for product positioning and marketing strategy.



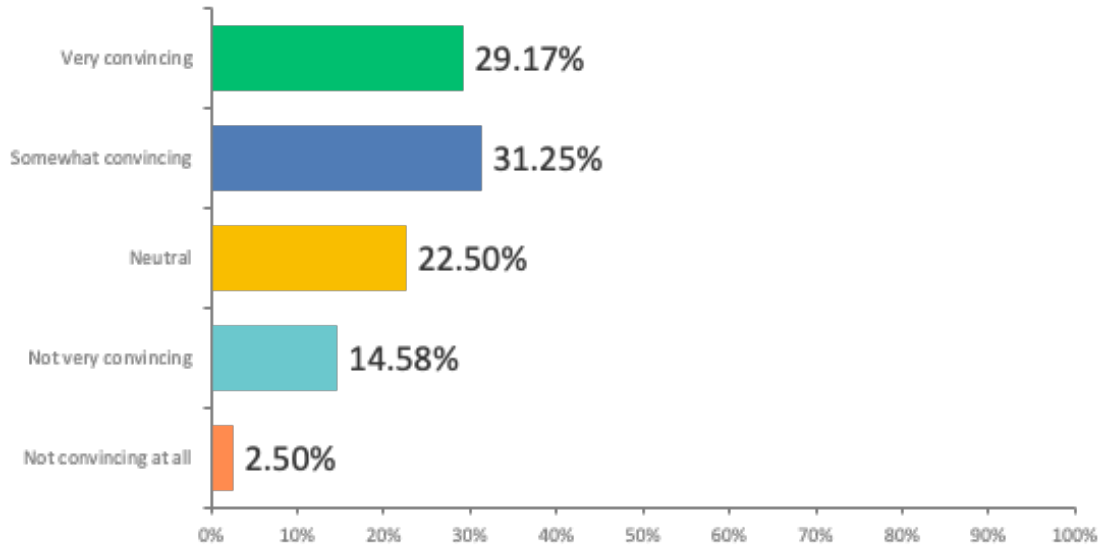
Implications: The entertainment, multitasking, and reading use cases all favor a book-style foldable — precisely the form factor expected from Apple. The low importance of "future-forward" positioning (3%) is a critical signal for product marketers: a **technology-forward message is unlikely to convert fence-sitters. The message that works is "iPhone + iPad mini in your pocket."**

4.2 The Phone + Tablet Replacement Argument

(Survey Question 13, N=291)

56% of respondents find the argument that a foldable can replace both a phone and a small tablet to be "very convincing" or "somewhat convincing." This is the most powerful single purchase rationale in the study.

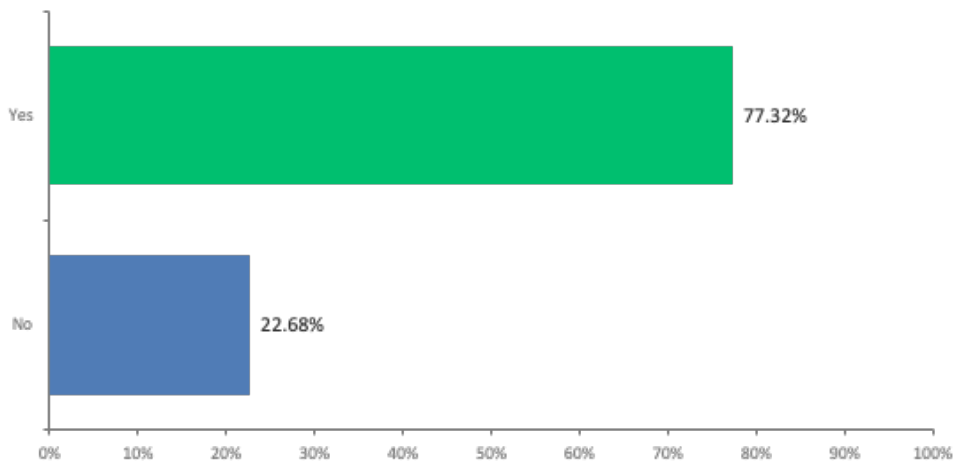
Q13: How convincing do you find the argument that a foldable smartphone can replace both a phone and a small tablet?



77% of respondents in this survey also use a tablet (Q6), making the "replace two devices" value proposition immediately actionable for most of the sample. **Among Pro Max users, who are overwhelmingly Apple tablet owners (iPad), the ecosystem consolidation argument is particularly powerful.**

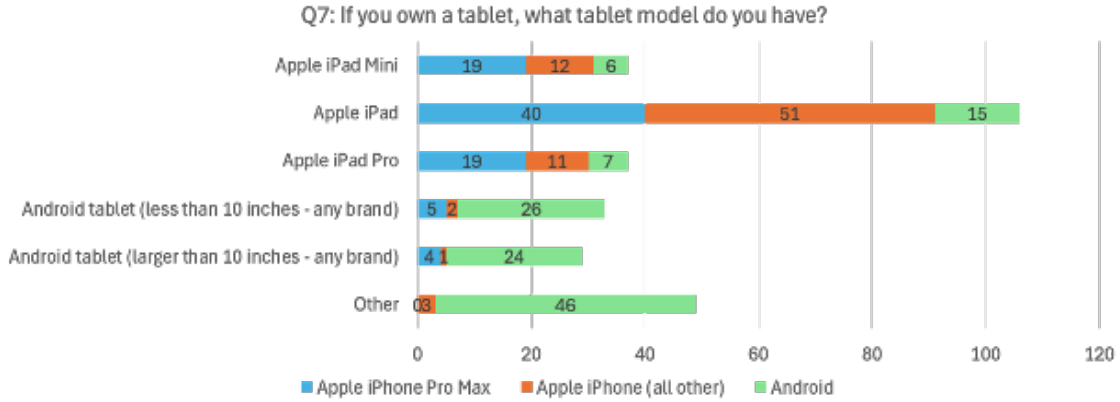
Q6: Do you use a tablet?

TABLET USERS = FOLDABLE PROSPECTS: 77% use a tablet — the large installed base for whom the 'phone + tablet in one' pitch is immediately relevant makes the replacement value proposition highly actionable.



Q7: If you own a tablet, what tablet model do you have?

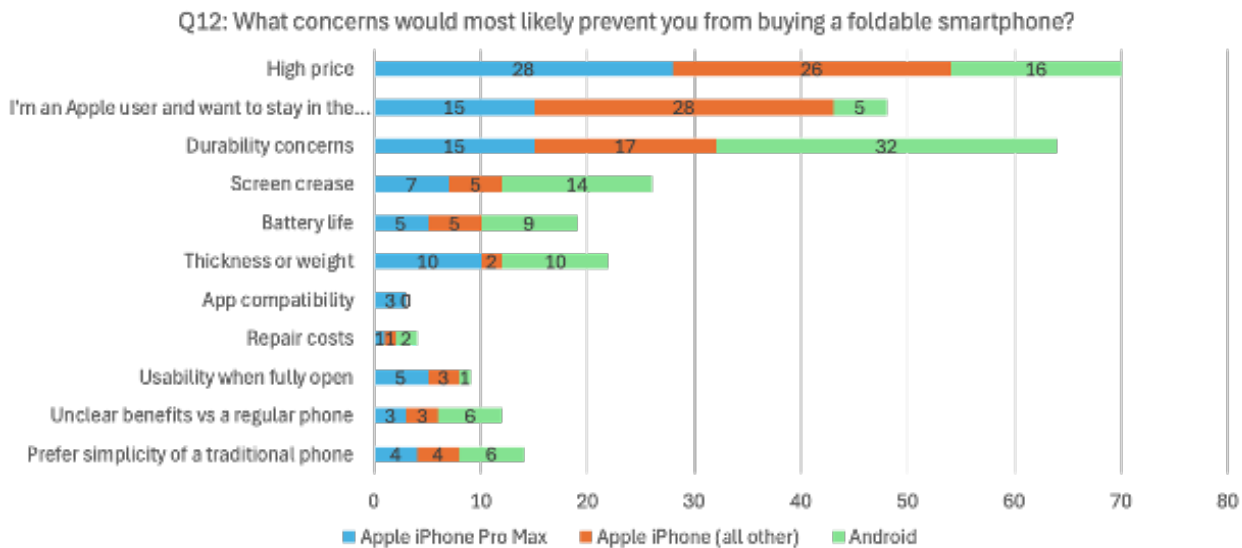
APPLE ECOSYSTEM IS DEEPLY ENTRENCHED : Pro Max users are overwhelmingly Apple tablet owners — this ecosystem lock-in argument works in Apple’s favor once they offer a foldable, removing the last major non-Apple barrier.



4.3 Top Barriers to Purchase

(Survey Question 12, N=291)

Price, durability, and ecosystem lock-in collectively account for approximately 63% of all purchase barriers cited. Apple's entry directly eliminates the third barrier for iPhone users (i.e., Apple Continuity compatibility). The first two require active solutions.



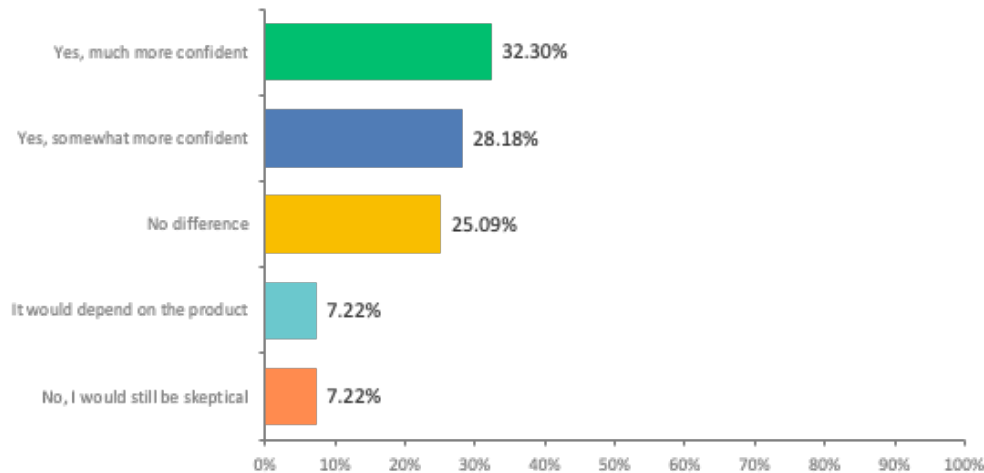
Section 5: The Apple Entry Effect

5.1 Apple's Impact on Category Confidence

(Survey Question 15, N=291)

One of the most striking findings in the study is the breadth of Apple's halo effect: **Apple's entry makes consumers more confident buying any foldable**, not just an Apple product. This means Samsung, Google, and other Android OEMs will benefit from Apple's market entry.

Q15: Would Apple entering the foldable smartphone market make you more confident in buying a foldable phone?



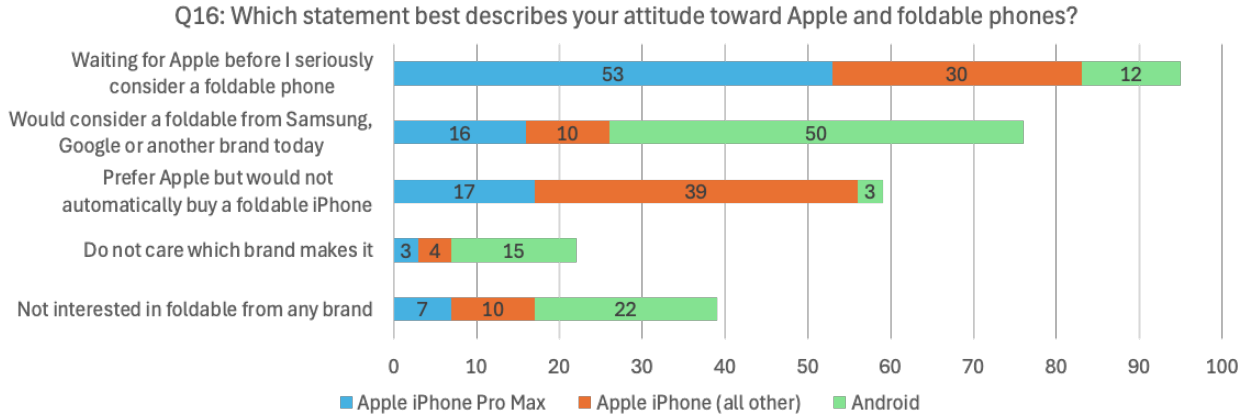
Strategic Note

The 61% "more confident" response includes consumers who do not intend to buy an Apple product. Apple's entry validates the category itself, not just its own SKUs. Investors and analysts covering Samsung, Google, and other Android OEM foldable market positions may want to model this halo effect in their demand assumptions for 2027–2028.

5.2 Consumer Attitudes Toward Apple Foldable

(Survey Question 16, N=291)

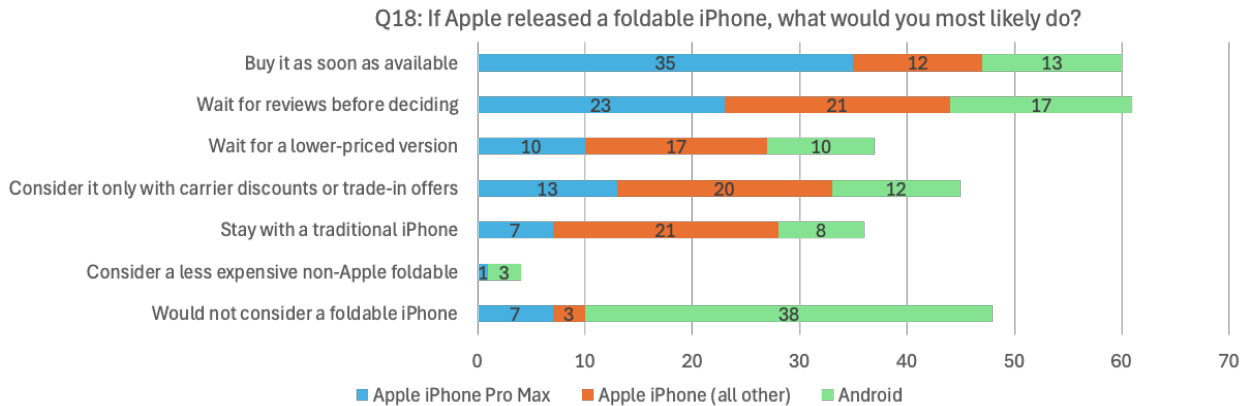
Apple controls the conversion trigger for approximately 1-in-3 U.S. consumers. **33% of respondents are explicitly waiting for Apple** before seriously considering any foldable purchase.



5.3 If Apple Launches: Purchase Scenarios

(Survey Question 18, N=291)

When asked what they would most likely do if Apple released a foldable iPhone, response patterns confirm the two-cohort demand structure that underpins this report's bullish outlook for Apple.



Key observation: 36% of iPhone Pro Max owners would buy "as soon as available" — this is the Day 1 cohort and the highest-confidence early-adopter signal in the study. Among other iPhone owners and Android users, "wait for reviews" is the dominant response, confirming that these cohorts require more product validation before committing.

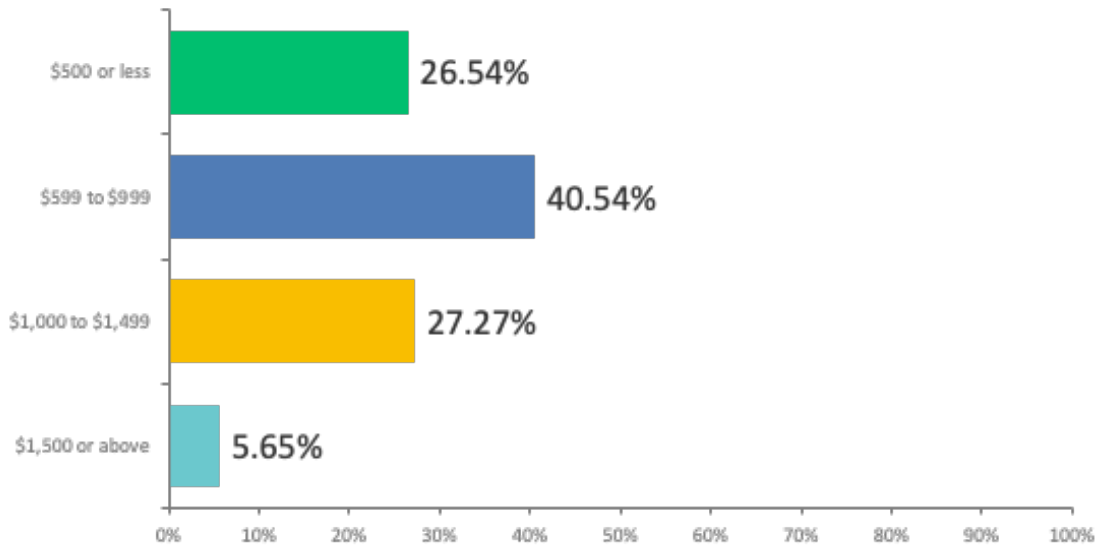
Section 6: Willingness to Pay & Pricing Dynamics

6.1 Price Expectations on Next Smartphone

(Survey Question 2 — Pre-Screen, N=407)

Price expectations at the population level set the baseline for assessing the challenge of a \$2,000+ foldable: only 5.1% of smartphone buyers are targeting \$1,500 or above for their next phone purchase under normal circumstances.

Q2: What do you expect to pay on your next smartphone?

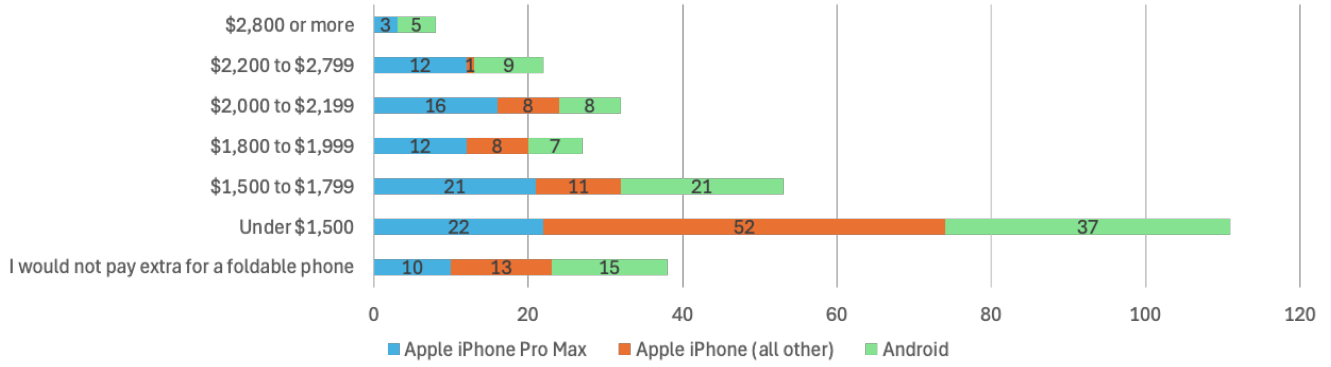


6.2 Maximum Willingness to Pay for a Foldable

(Survey Question 17, N=291)

The question asked respondents the highest price they would consider paying for a foldable smartphone that "clearly delivered benefits over a traditional smartphone." Results reveal a striking price ceiling that has major implications for launch strategy. **Pro Max users are most price-tolerant (32% willing to pay \$2,000+).**

Q17: What is the highest price you would consider paying for a foldable phone if it clearly delivered benefits over a traditional phone?



Section 7: Go-to-Market & Product Implications

7.1 Two-Track Positioning Strategy

The survey data supports treating the Apple foldable launch as two parallel go-to-market workstreams somewhat staggered and with slightly different messages, pricing, and conversion timelines.

7.2 SKU & Pricing Architecture

Based on the willingness-to-pay distribution, a single-SKU strategy at \$2,299 will leave significant demand unreached. Survey data supports a two-SKU architecture analogous to the iPhone Pro Max vs. iPhone Pro split:

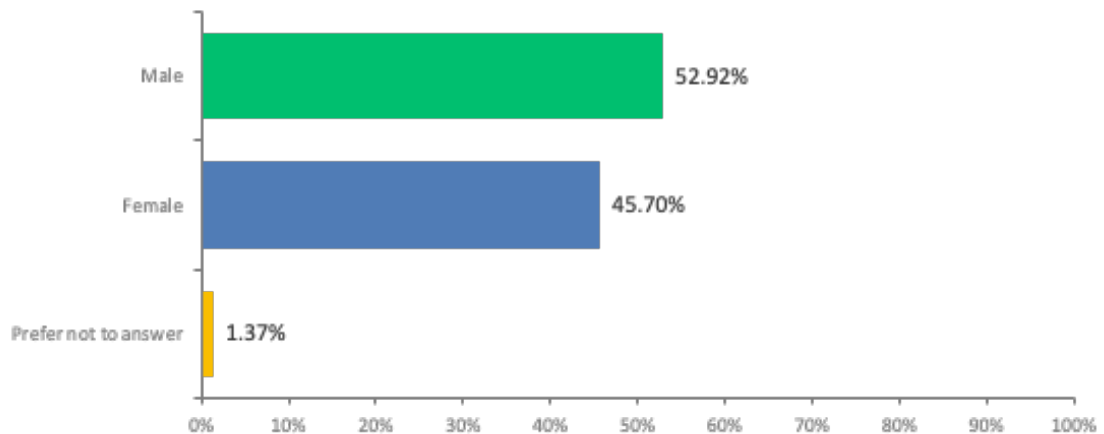
- SKU 1 — Foldable Pro Max (~\$2,299–\$2,499): Targets the 32% of Pro Max owners willing to pay \$2,000+ unsubsidized. Premium materials, maximum specifications, Apple Intelligence flagship positioning. This is the Day 1 launch product.
 - Message: "iPhone + iPad mini in your pocket." Lead with screen utility, two-device consolidation, and productivity unlocks. Price is secondary — this cohort already spends \$1,200+ on a phone. Emphasize the rational upgrade logic: replace two devices, pay for one.
- SKU 2 — Foldable (~\$1,799–\$1,999 launch / ~\$1,299 effective with discounts): Opens the \$1,500–\$2,000 willingness cohort (31% of respondents). Requires active carrier subsidy partnerships. This SKU should launch 90+ days after SKU 1 depending on supply or manufacturing yield constraints and/or the desire to maintain near-term super clear in-market execution with SKU 1.

Section 8: Respondent Demographics

Demographic data was collected from all 291 core survey respondents. The sample reflects a premium-skewed population consistent with the study's focus on the foldable smartphone opportunity, which is a premium-segment market.

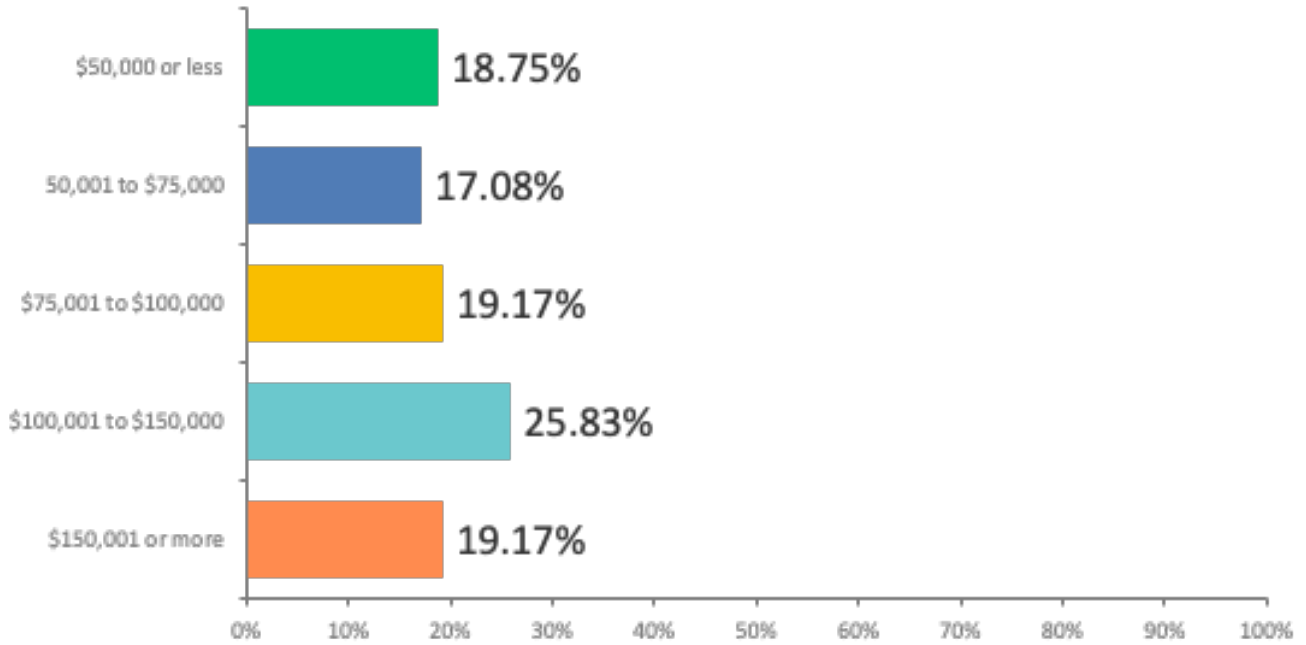
Gender

How would you describe yourself?

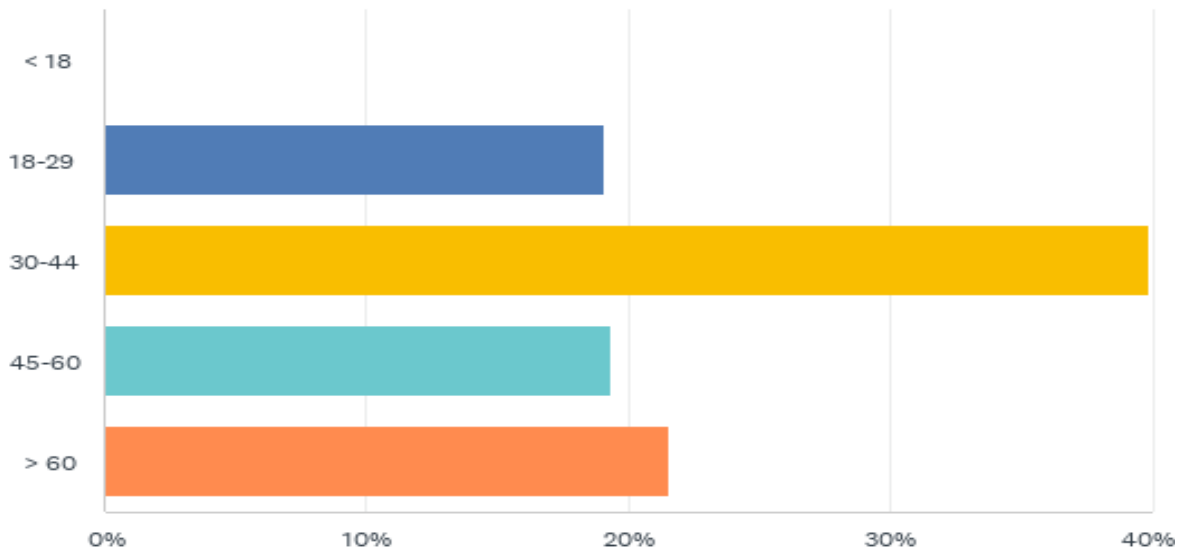


Household Income

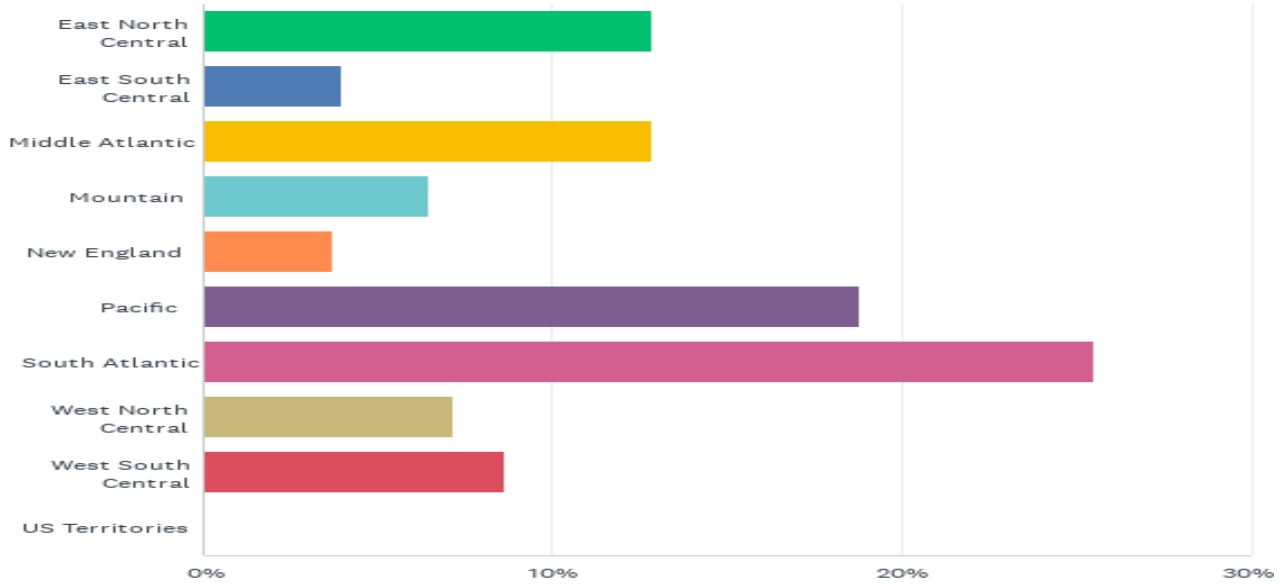
The income distribution is relatively balanced across tiers, with a slight over-representation of upper-middle-income households (\$100K–\$150K at 23.4%). Approximately 42% of respondents have household incomes above \$100,000, consistent with premium smartphone ownership profiles and the target market for a \$1,500–\$2,500 foldable device.



Age Distribution



Geographic Distribution



Survey respondents were distributed across all major U.S. census regions, with representation broadly consistent with U.S. population distribution. No single region was over-represented by more than 5 percentage points relative to the national population split.

Note on demographic implications: The age and income composition of this survey is consistent with premium smartphone ownership and represents the relevant consumer population for a \$2,000+ foldable device. Budget-tier consumers, who would be unlikely purchasers at foldable price points, are appropriately under-represented in this study design.

Summary & Strategic Conclusions

This SmartTech Research primary research study of 291 U.S. premium smartphone consumers provides a granular demand-side assessment of the pre-Apple foldable smartphone market. The findings may help enhance embedded assumptions in forecast models and surface actionable strategic implications for product, go-to-market, and investment decision-makers.

What the Data Confirms

- Apple's entry will be a category inflection point. 61% of consumers say Apple's launch would increase their confidence in foldables broadly — confirming the category unlock thesis.
- Pro Max owners are the primary demand engine. 84% intent, 36% day-one purchase intent, and 34% already own a foldable — this segment is ready.
- Bigger-screen utility, not innovation, is the winning message. Marketing should lead with the “iPhone + iPad mini” replacement value proposition.
- Price and durability are the only remaining barriers. Apple's entry eliminates ecosystem lock-in. Carrier subsidies and product quality must address the other two.

What the Data Challenges

- Android conversion models may be too aggressive in Year 1. 37% expressed interest, but 23% of Android respondents already own Galaxy Z devices. Android switching will be a Year 2–3 story.
- Analyst global share estimates may underrepresent the U.S. premium. iPhone's >60% U.S. market share creates a structural basis for Apple to hold up to ~49% U.S. foldable share in 2027 — roughly 3x global consensus estimates.
- No analyst model makes carrier subsidy penetration an explicit variable. It is potentially the single most impactful unmodeled factor in Year 1 Apple foldable volume.

About SmartTech Research



SmartTech Research is an independent technology research and industry analyst firm providing a range of services including competitive intelligence, strategic planning, business strategy, marketing and communications, roadmap execution, solution selling, advisor, and fractional executive support. The firm's research focuses on consumer and business solutions, mobile devices, and emerging technology categories.

The SmartTech Marketing platform spans multiple channels: the SmartTechCheck Podcast focused mostly on consumer and enterprise technology, the TechStack Podcast providing deep dives into enterprise and B2B technology trends, and the new SmartTechCheck EduSeries made for YouTube offering analysis, insights and practical “How To” guidance from strategy to launch.

SmartTech Research conducts primary consumer research using online panel methodologies and combines quantitative survey data with secondary analyst sources to provide actionable strategic intelligence for product management, investment, and competitive planning audiences.

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