

Report for mobile phone case consumption trends and insights 2023

— Focusing on high-end smartphone users

Lifestyle, digital life

Smartphone usage
scenario trends

Mobile phone case
development trends

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Data sources for the trends and insights report

The trends and insights report is jointly published by Ipsos, TORRAS and WGSN; the data individually collected per company is aggregately used to analyze the trends and provide insights in the report. Unless otherwise specified, "consumers" in the following reports refers to overall consumers (from the below 5 countries).

Ipsos quantitative research sample criteria: purchased smartphone in the past 4 years; purchased and used phone cases within the two years. Final sample completion is listed below:

	China	U.S.	UK	Germany	Japan
Total samples	1007	513	515	509	503
• Males	46%	35%	39%	39%	46%
• Females	54%	65%	61%	61%	54%
• Aged 18–24	9%	8%	9%	16%	7%
• Aged 25–30	47%	18%	21%	22%	15%
• Aged 31–40	39%	44%	42%	37%	33%
• Aged 41–50	5%	30%	29%	25%	45%

WGSN trends analysis and insights on consumers' lifestyle and digital life comes from WGSN owned Insight website's & WGSN Consumer Tech website's reports in the following:

- 《2025 STEPIC driving factors》
- 《2026 STEPIC innovation areas》
- 《Office lifestyle: 2023 consumer profiles》
- 《General health craze》
- 《Lifestyle Strategy: Finding Meaning in Life 》
- 《Lifestyle Strategies: The Digital Nomad》
- 《Future Wearable Technology》
- 《New Concepts: Metaverse》
- 《Key Trends: Reshaping AI Interaction in User Experience》
- 《Decoding Chinese Social Media Aesthetics: May 2023》
- 《2023 China Fast Fashion: #Cleanfit Light and Simple Style》

The related phone cases' pictures, and the development history stories are shared by **TORRAS** product research & development experts, also collected and organized from public sources.

PART

ONE

Lifestyle and digital life changes

Generally, consumers are consciously pursuing a healthy, balanced and quality life.

In the post-epidemic era, consumers care more about the healthy life; while at the same time, they are gradually back to work and become more focusing as economy recovers and the labor forces increase.

Consumers also manage to achieve work life balance after busy work, tend to lead a natural, real, comfortable life.



Physical and mental health

Consumers are increasingly aware of the importance of physical and mental health, as well as a balanced life.

The new generation of consumers is trying to fight against fatigue and burnout, and also proactively embraces the healthy living.



Focusing on work

According to World Bank statistics, the global labor forces reached 3.4 billion since 2022.

Regardless of geography, race, religion and socioeconomic background, work is a “necessity” for most consumers. In China and U.S., employees work more than 2,000 hours per year. Undoubtedly, work is an important scenario that occupies most of time.



Quality time

During the economic uncertainty time, consumers spend more time on work; but they also start to realize the importance of appropriate time allocation between work and life, pursuing living naturally and comfortably and caring their own needs. They try to feed their time on more quality things, e.g., focusing on personal solitude, returning to family, and maintain relationships.

Digital life is increasingly penetrating, and the number of digital nomads is further growing.

Digital entertainment further popularizes, with online working being not limited by any geographic locations; consumers are eager to build seamless connections between work & life, online & offline.

The world is moving towards the entire digital era, and the number of digital nomads is further growing.

Digital Nomad

It is estimated that by 2035, the number of digital nomads will reach 1 billion.

Digital Nomad, refer to those who do not need to work in fixed workplaces but work digitally anywhere.

Globally, the streaming media users and their average active hours increase sharply.

From Europe and the United States to Asian countries, there are more and more people working as freelancers, content creators, or working in live broadcast or short video industry. Besides, for facilitating digital workers' remote working, the Travel Incentive programs, or digital nomad visas are also emerging.

When digital entertainment becomes more popular, and digital workers do not need to be limited in areas to work, consumers are eager to build seamless connections between work & life, online & offline.

Freelancers is becoming an emerging profession, especially those who independently operate social media accounts and post self-produced content after work. They are actively and spontaneously sharing their posts to the community culture with vertical interest tags, showing their passions and talents.

PART

TWO

Smartphone usage scenarios facilitate the functional development of phone cases

“No mobile phone, no life” – The current usage scenarios of smartphones are diversified.

Smartphone is highly penetrating into all aspects of life and work worldwide. And the usage scenarios are diversified, which is in response to consumers’ needs for a balanced and healthy life.

Global smartphone penetration in 2022:

68%

GSMA «2023 Current status of mobile Internet connections»

Countries’ smartphone penetration (2022):

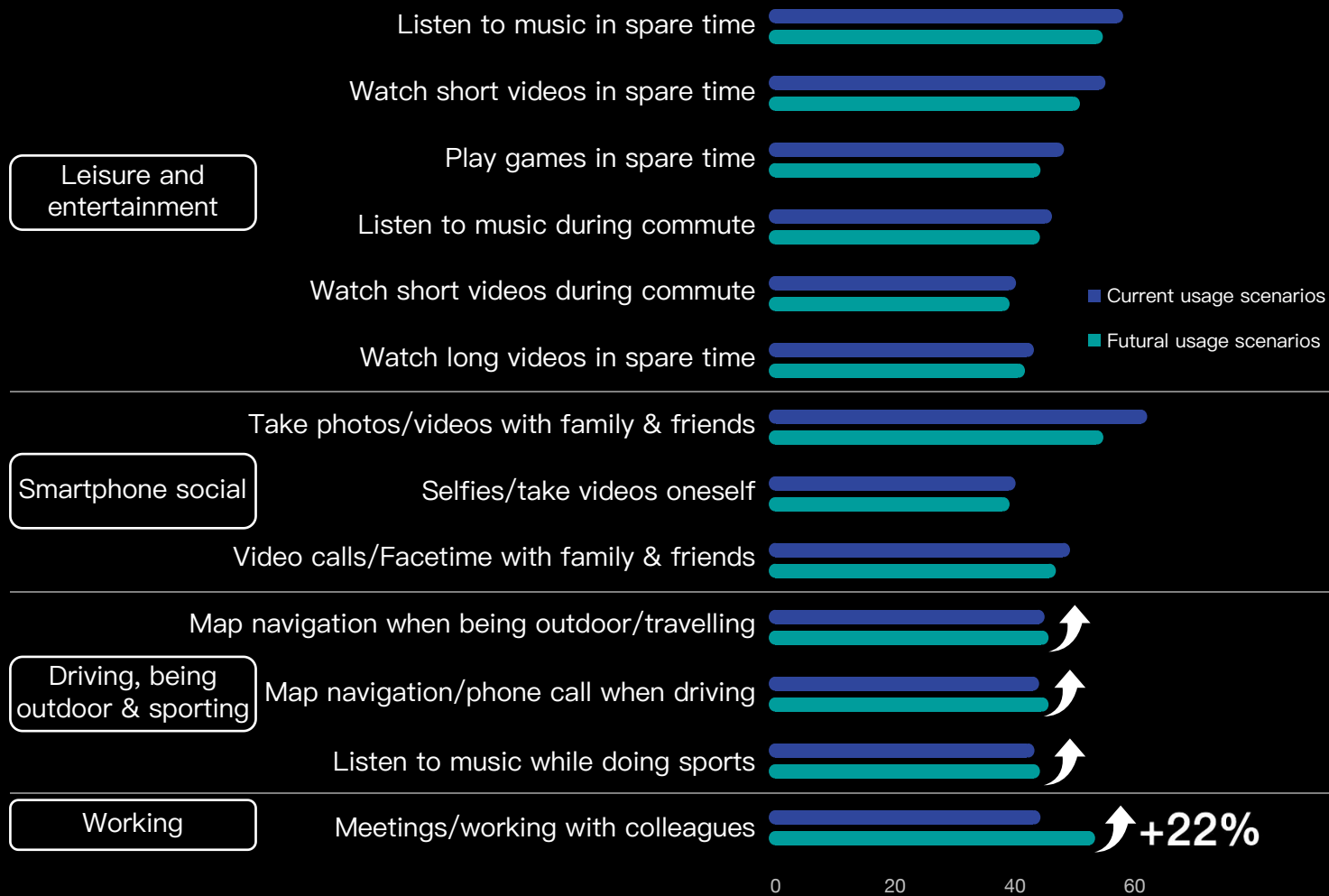


Statista – Market Indicators

The current usage scenarios of smartphones:



Smartphone social and leisure entertainment are daily routine; while it will more frequently use phones when driving, being outdoor and online working in the future.



Leisure entertainment is the mainstream
e.g., listen to music, watch videos, play games

Smartphone social scenario prevails
Frequently take photos/videos, facetime with family/friends

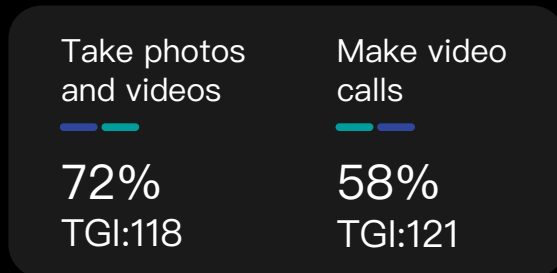
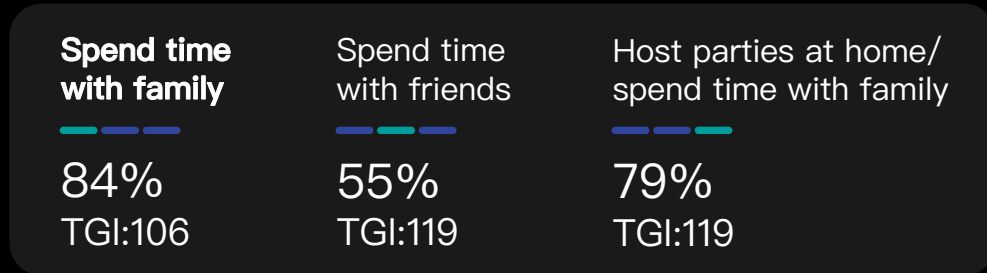
The future trend is more towards
Mobile, outdoor and sporting scenarios

The rising popularity of
online working scenarios due to the epidemic

Geographical differences: there are more social interaction scenarios in western countries, while people are quieter and more reserved in eastern countries.

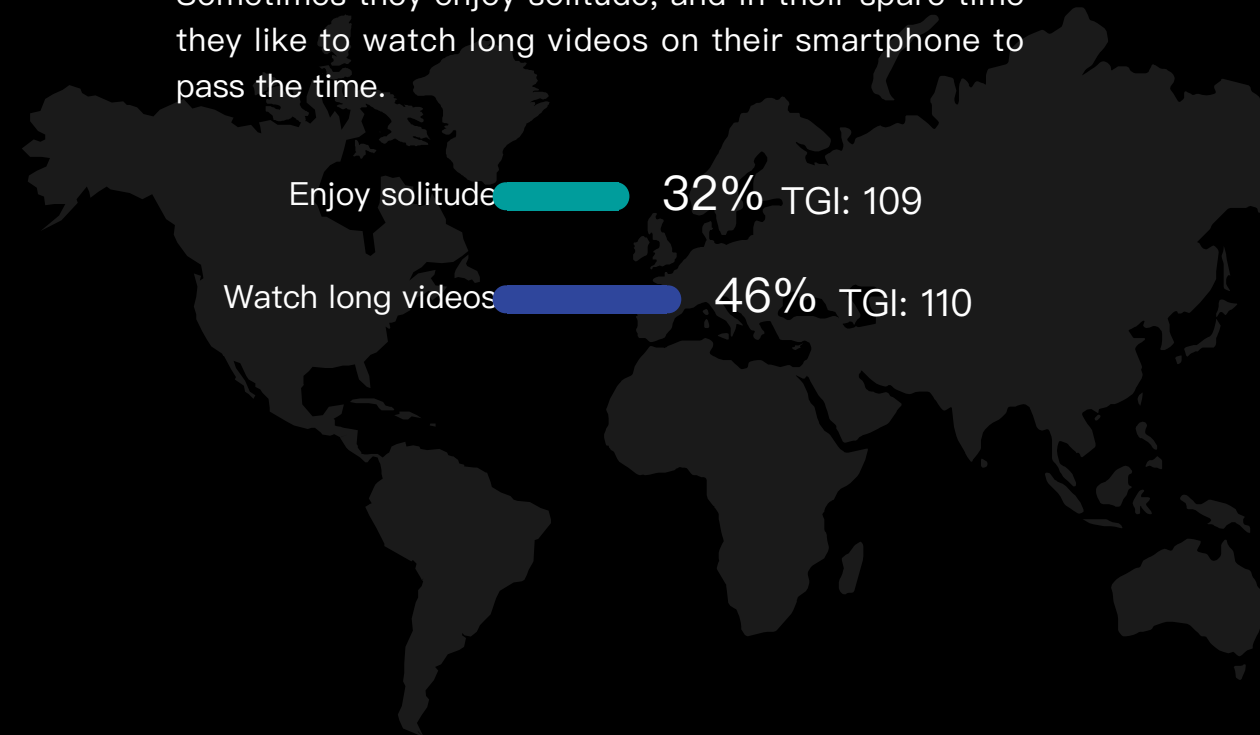
Western countries

- Prefer to spend time with their family/friends on a daily basis. They spend more time in activities with their family and friends in their free time (hosting parties at home to entertain their relatives and friends and keeping their family and children company);
- So they use their smartphone more often to take photos, videos and make video calls with family and friends.



Eastern countries

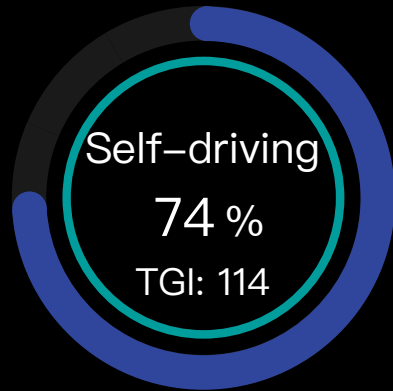
- Family is still the focus of life, but the way of expressing love and communication is relatively restrained (not as common as in Western countries where people often take photos and videos and make video calls);
- Sometimes they enjoy solitude, and in their spare time they like to watch long videos on their smartphone to pass the time.



Regardless of Eastern or Western countries, driving scenarios are the common trend in the future.

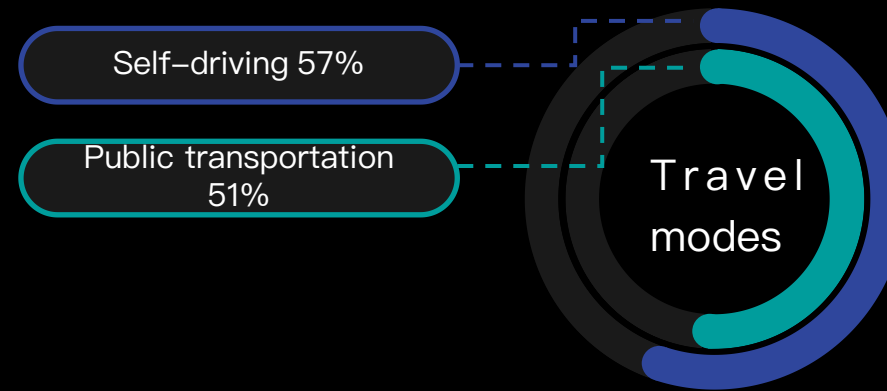
Western countries

Daily travel/commuting is now dominated by self-driving, so smartphone assistance scenarios while driving are more common.



Eastern countries






Self-driving for daily travel is as common as taking public transportation. However, with the rise of new energy vehicles in China and the further reduction of driving costs, self-driving will become more common.



43.5

Car ownership per 100 households in China in 2022.

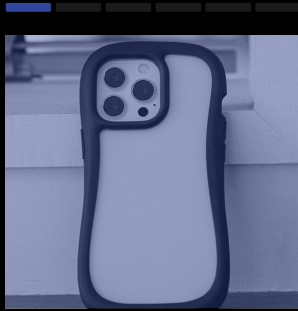
In these important scenarios, different actions are taken when using smartphones, resulting in differentiated needs for mobile phone cases.

Usage scenarios of smartphones	The most common movement	Main demands for phone cases
 <p>Leisure and entertainment Listen to music/watch short videos/play games</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Hold it in one hand <input type="checkbox"/> Hold it in both hand 	<p>Anti-slip and anti-drop</p>
 <p>Socialize with family/friends Take photos/take videos/make video calls</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Hold it in one hand <input type="checkbox"/> Put it on the desktop/tabletop 	<p>Camera protection, with a kickstand and hands-free</p>
 <p>Leisurely movie watching Watch long videos</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Hold it in one hand <input type="checkbox"/> Put it on the desktop/tabletop 	<p>With a kickstand and hands-free</p>
 <p>Working Meetings/work with colleagues/file transfer</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Put it on the desktop/tabletop <input type="checkbox"/> Lay it flat 	<p>With wireless charging (meetings drain battery quickly) With a kickstand or a magnetic back and hands-free</p>
 <p>Driving Map navigation/make phone calls</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Use a car phone holder <input type="checkbox"/> Hold it in one hand 	<p>With magnetic charging (map navigation drains battery quickly) With a magnetic back, safe driving and hands-free</p>

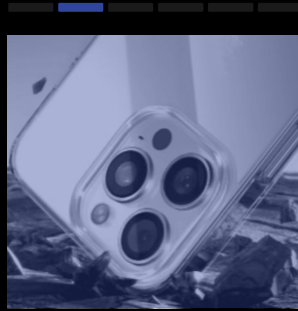
This has led to detailed demands for the features or functions of phone case.

Upgrade functions to protect phones like anti-slip and camera protection, and hands-free functions like with a kickstand and with a magnetic back have been developed.

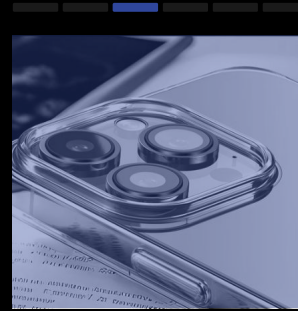
Anti-slip Case



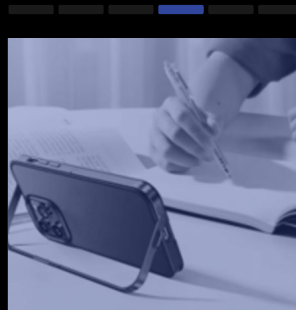
Drop Protection Case



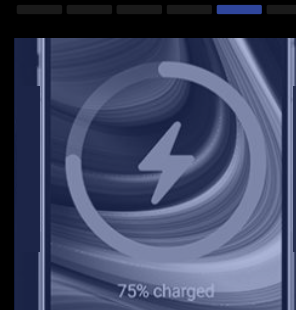
Camera Protection Case



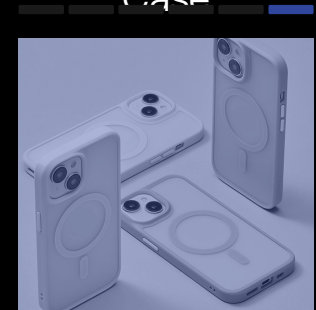
Kickstand Case



Wireless Charging Case



Magnetic Case

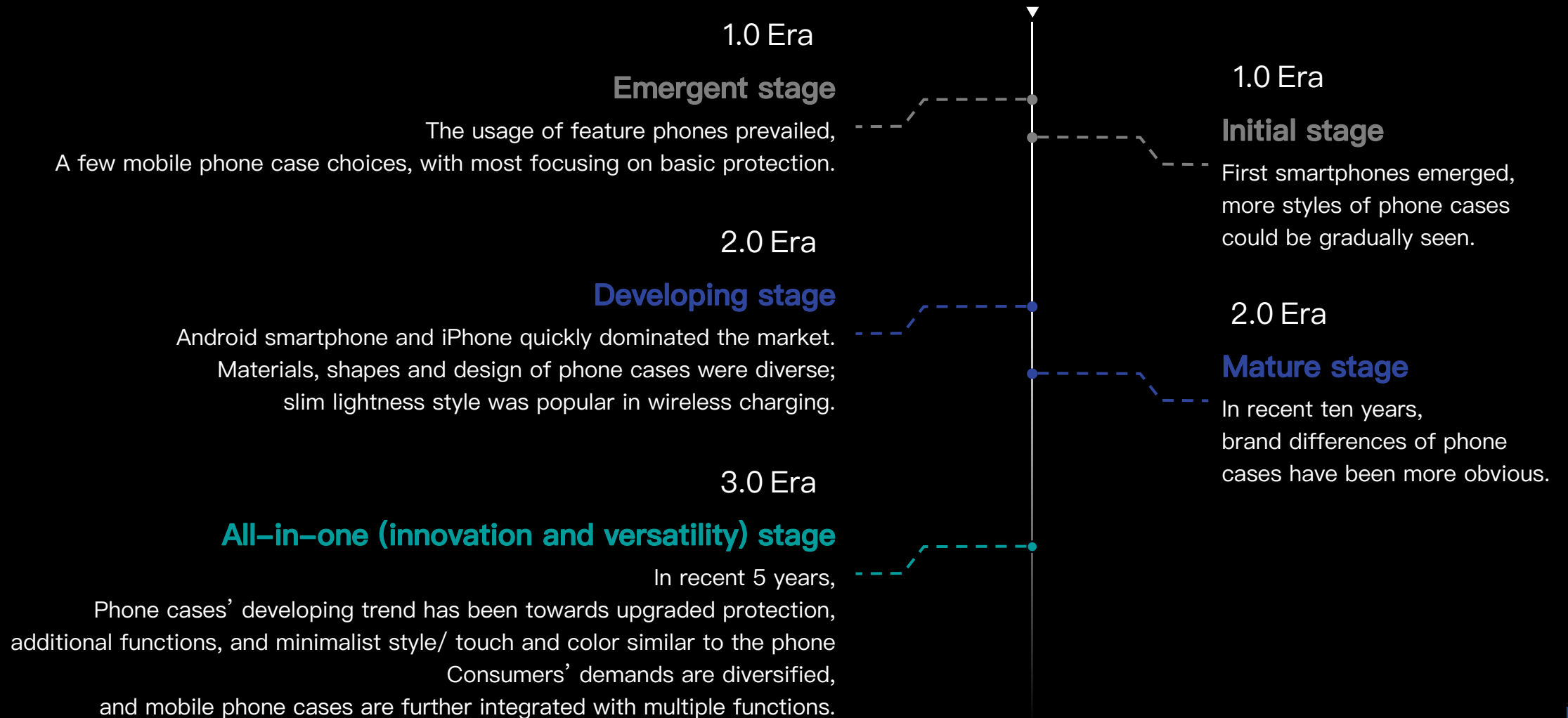


PART

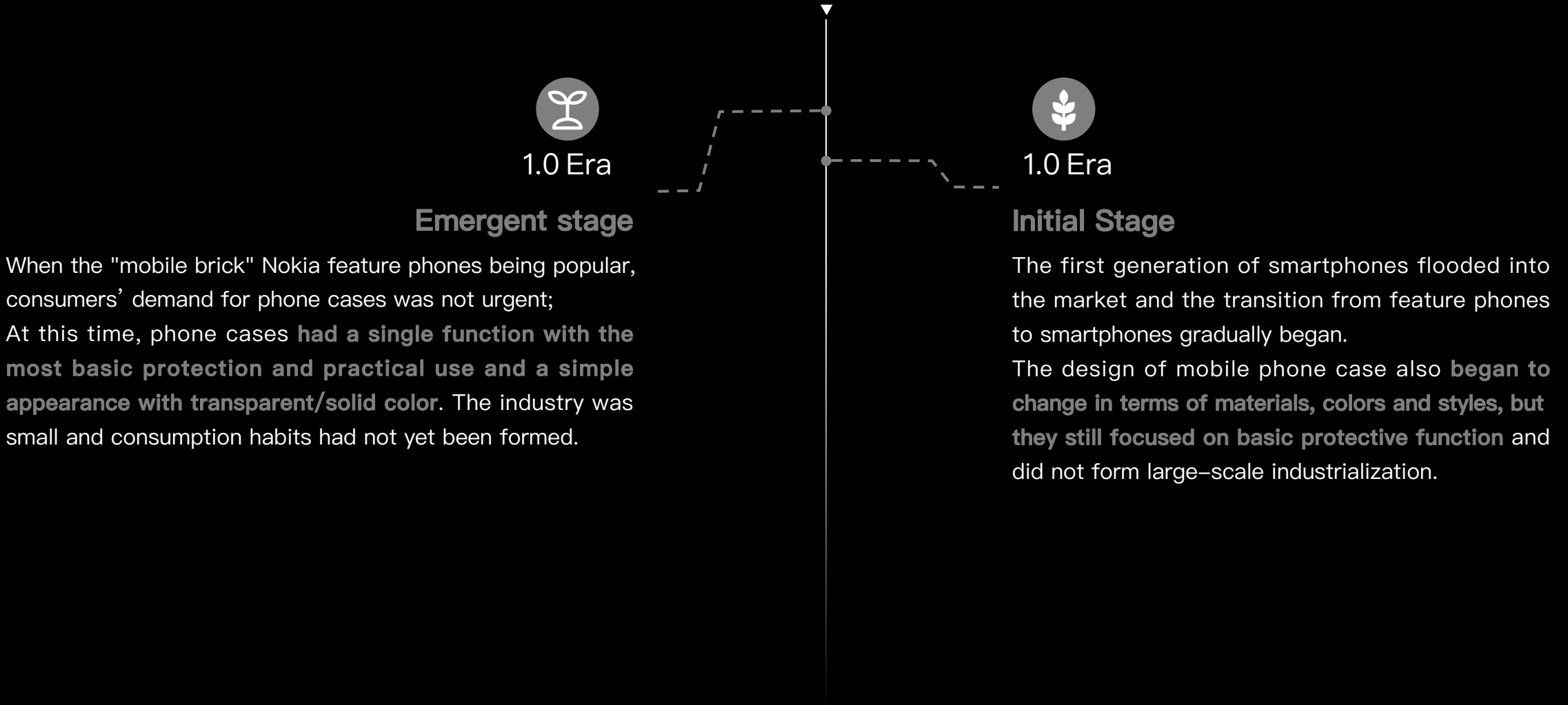
THREE

Mobile phone case development
history and current market dynamics

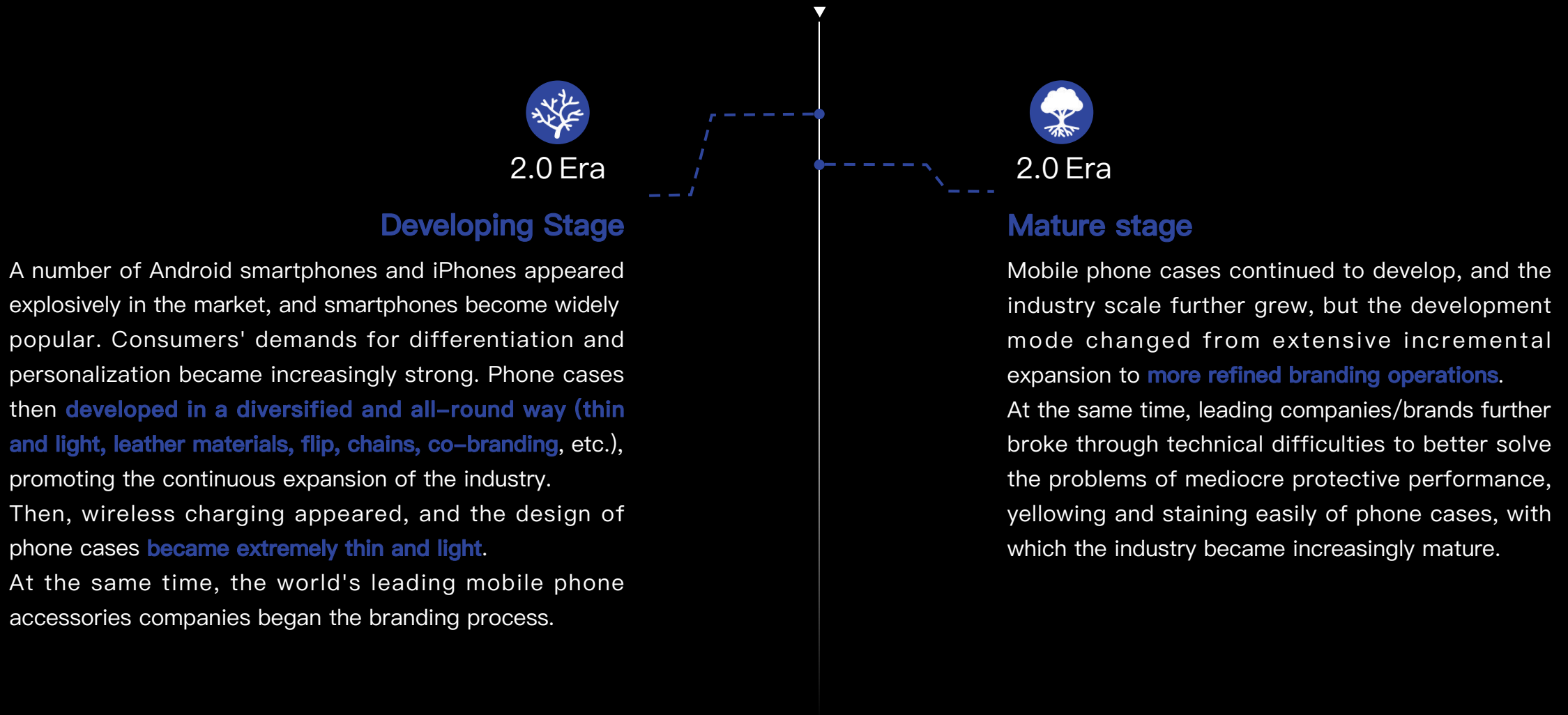
Globally, while smartphones are transitioning from feature phones, mobile phone case products are also being constantly upgraded, from improvements in basic protection, appearance and materials to comprehensive functional evolution. Phone cases have gradually become a "rigid need" for users.



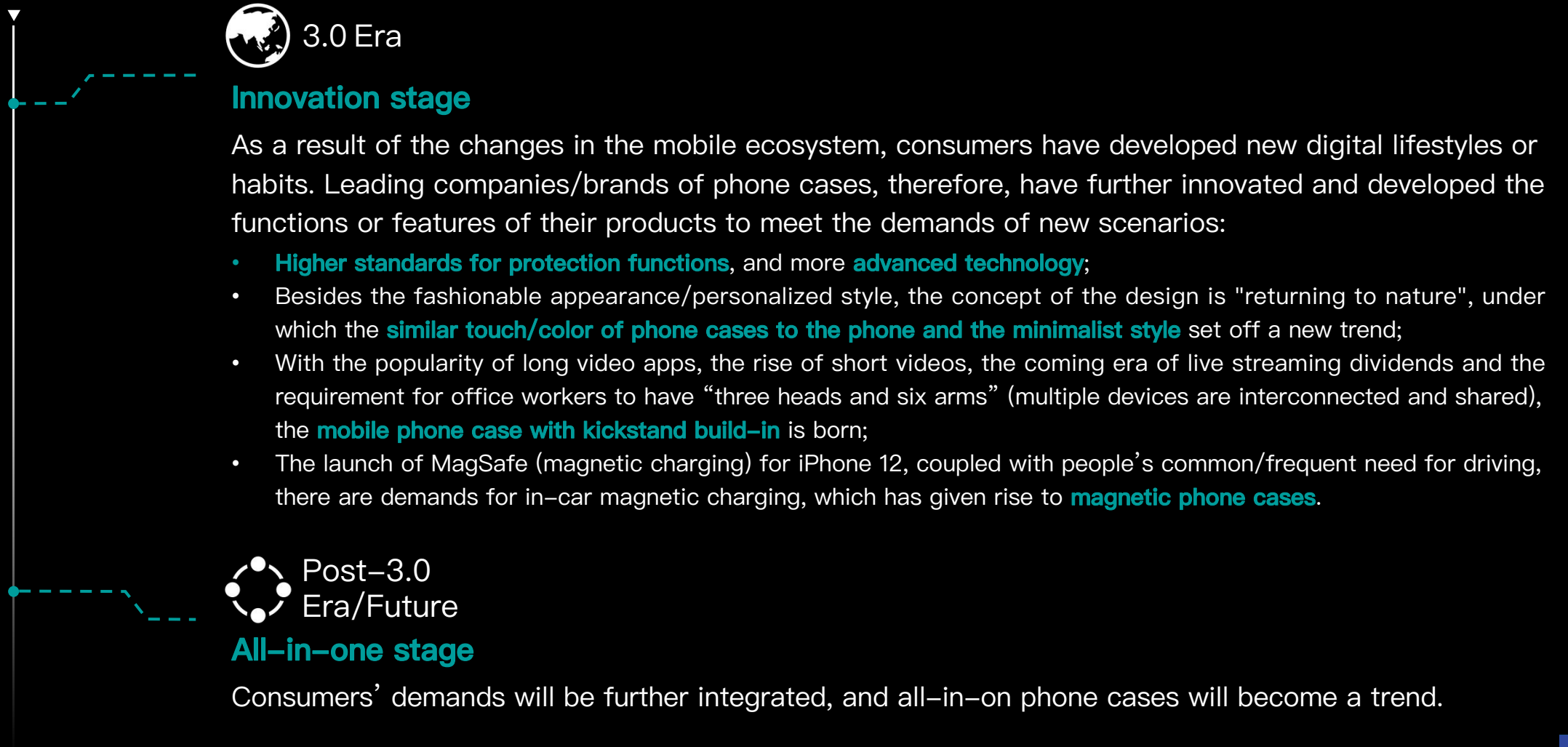
In 1.0 era, the emergence of smartphones generated the industry of phone cases, but the functions and design were relatively basic and simple.



In 2.0 era, with the popularity of smartphones, phone cases gradually became a necessity for users, whose product diversification and brand differentiation further developed.

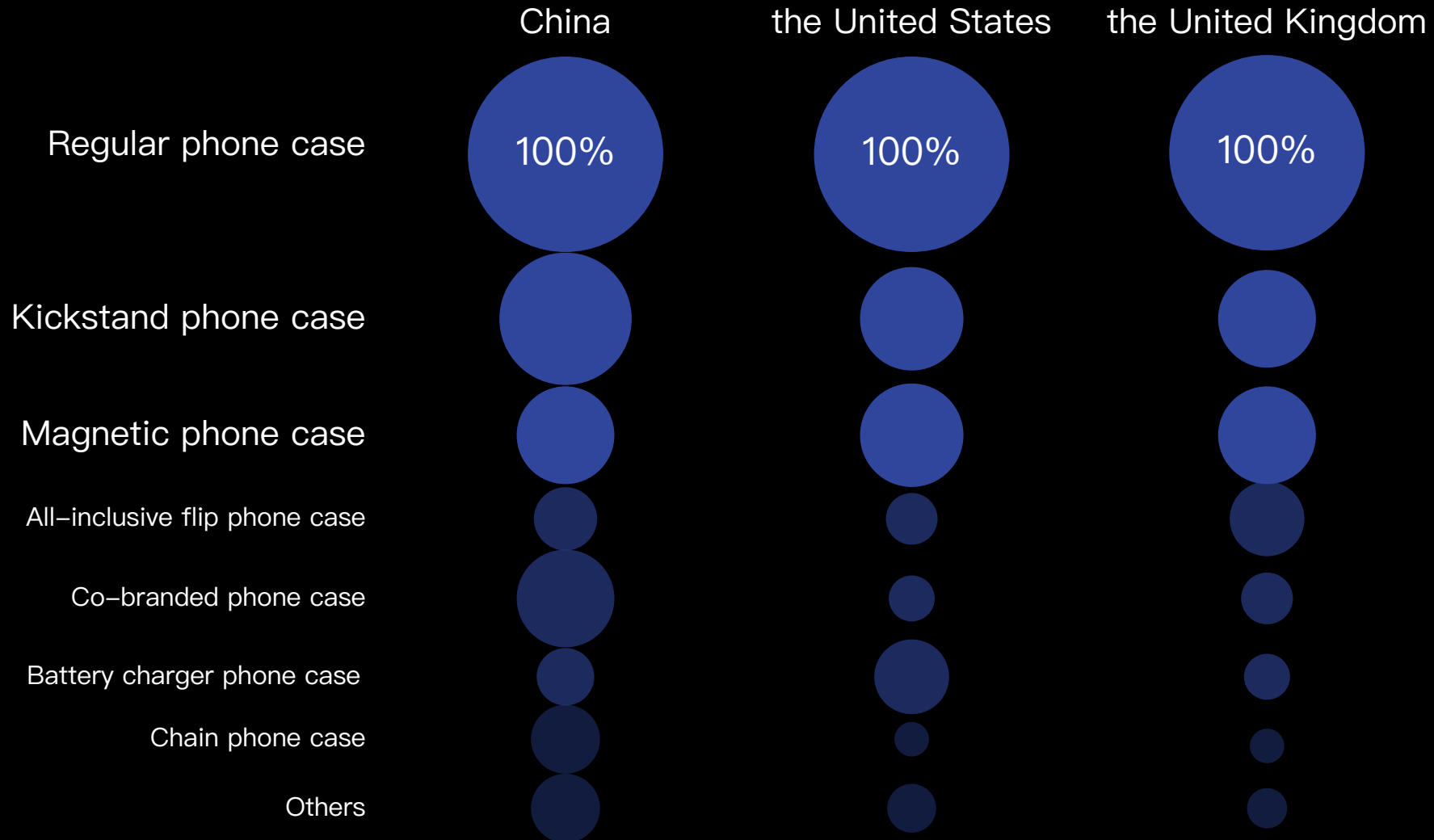


In 3.0 era consumers' demands for mobile phone cases become more diverse and comprehensive, which leads to their development towards multi-functional integration.



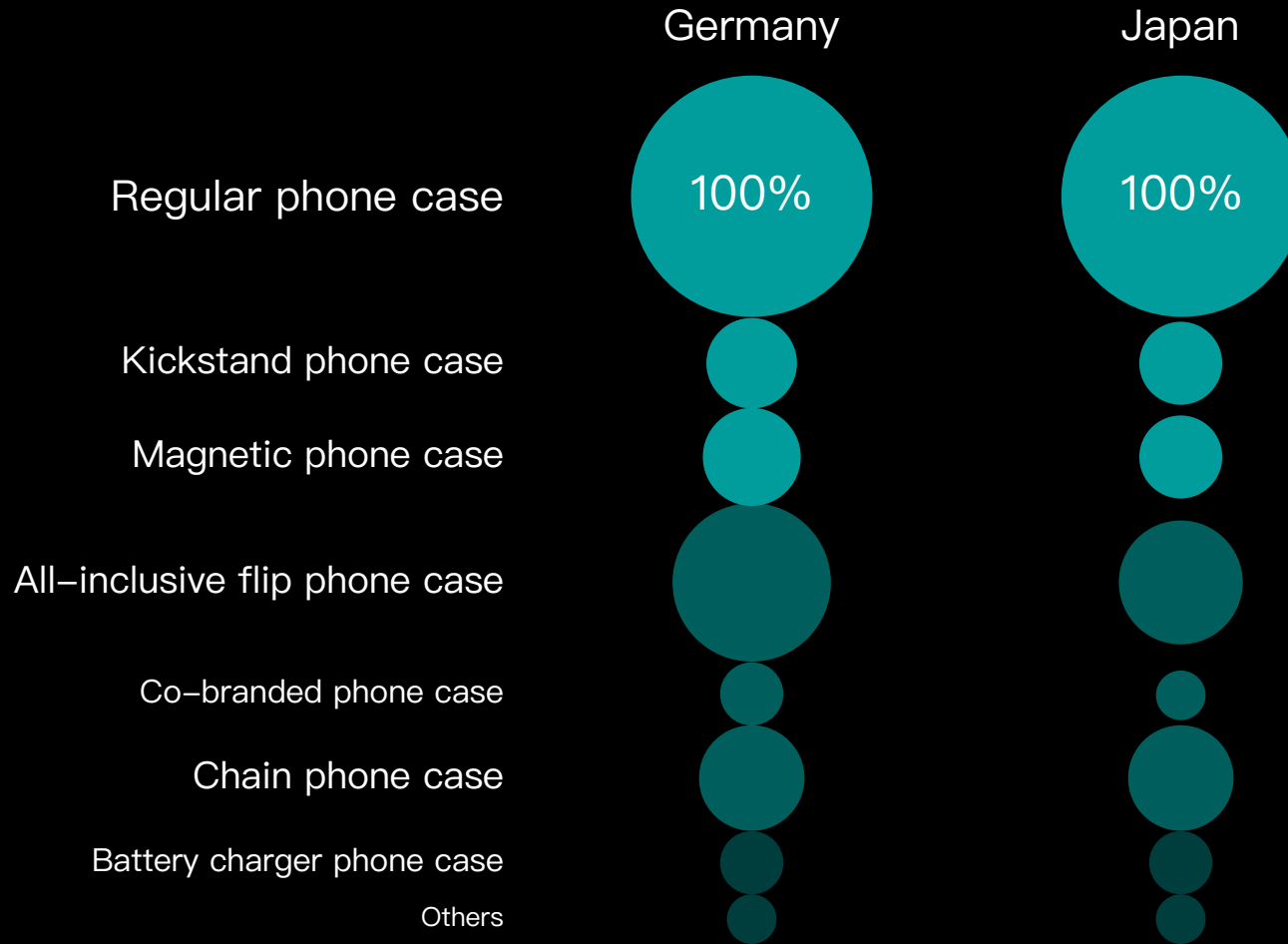
China, the United States & the United Kingdom are the first to enter the 3.0 era — the innovation stage.

In addition to basic/regular phone cases, consumers use kickstand cases and magnetic cases more often.



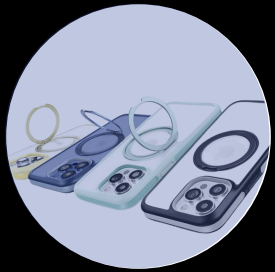
Germany and Japan are in post-2.0 era and are gradually advancing to the 3.0 era.

German and Japanese consumers currently purchase more chain and all-inclusive flip cases, and are gradually beginning to use kickstand and magnetic cases.



Leading companies have launched innovative products in 3.0 era to further differentiate their brands.

- Functions: TORRAS has excellently embedded the kickstand into the phone case, fulfilling all-in-one functional demands, which is known as the "Expert in kickstand phone cases". OtterBox has also established a leading advantage in "drop protection". Popsockets takes advantage of fashion style in airbag ring accessories in the back;
- Appearance design: CASETiFY, with its rich design styles and diverse co-branding, leads the "trendy and personalized design" while PITAKA dominates in minimalist appearance.



TORRAS

**Expert in
kickstand phone
cases**

Embedded kickstand
All-in-one phone
cases



OTTERBOX

**Drop
protection**



POPSOCKETS

**Fashionable ring
accessories**

Airbag ring accessories
Diverse pop hat styles



CASETiFY

**Trendy and
personalized design**



PITAKA

**Minimalist
appearance**

Otterbox — a consultant in drop-protection, a must-have for those with a balanced life.

It contains more mature phone case users who love their families and seek a work-life balance. They tend to use smartphone in working, entertainment, outdoor, and driving scenarios, and expect an all-in-one phone case with outstanding drop-protection.

Otterbox brand summary:

Otterbox's brand users tend to be of mature age; their gender & occupation distribution are similar to the overall users of mobile phone cases.

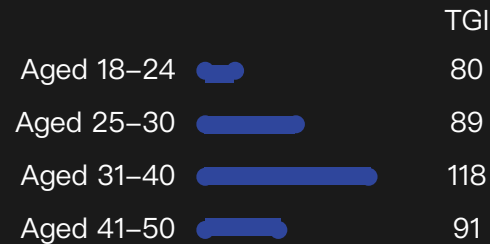
Its users enjoy life and value family activities as well as self-entertainment, so they have related scenarios demands. They also relatively more frequently use their smartphone in outdoor, driving and online working scenarios.

The users' demands for phone cases: higher standard of drop-protection is of most importance, with a kickstand or being magnetic, thin, light and portable, can be easily used in working, outdoor and in-car scenarios.

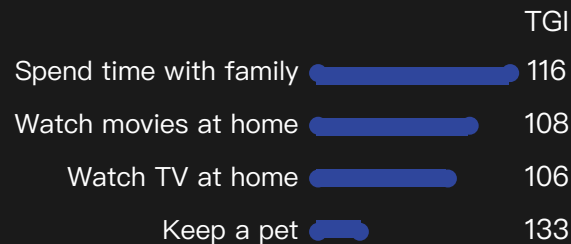
Gender



Age



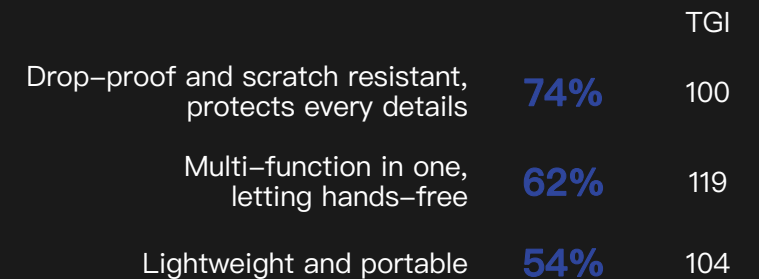
Leisure activities



Smartphone usage scenarios



Expectations on phone case



CASETiFY — Young ladies' favorite, standing for fashion and personalization.

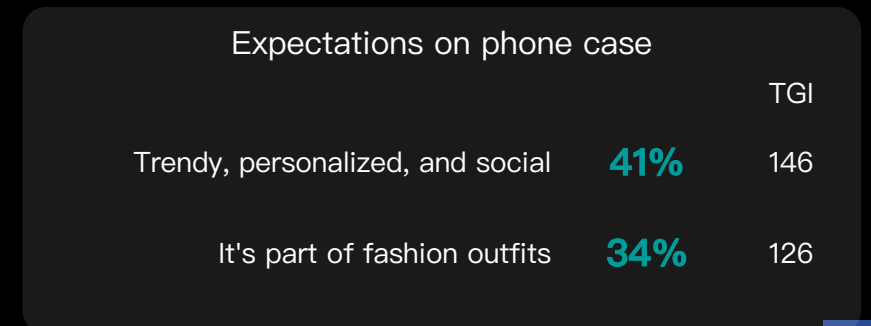
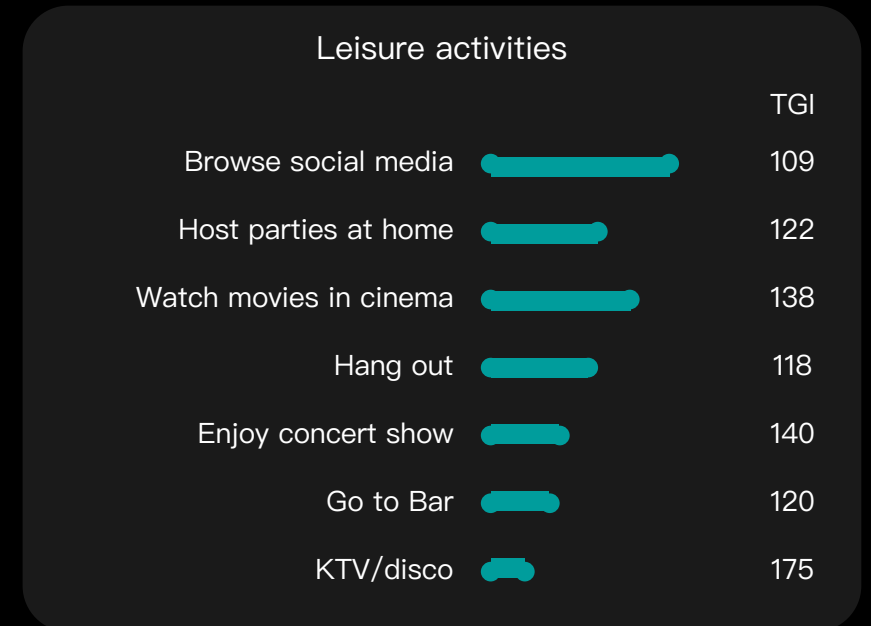
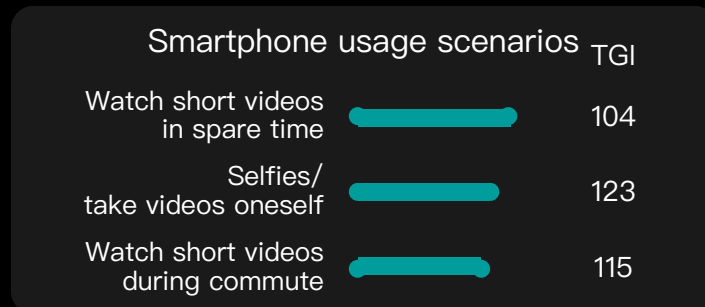
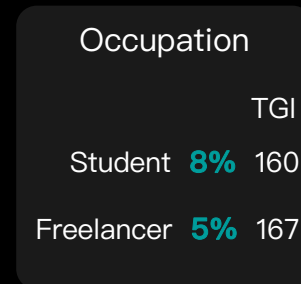
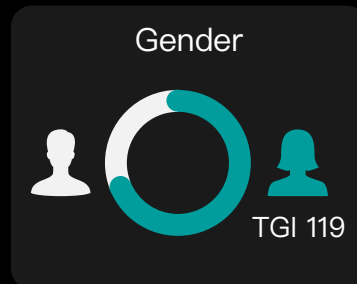
Phone cases have been a part of fashion outfits of these young female users who are socially active, enjoying various entertainment activities.

CASETiFY brand summary:

CASETiFY users are mostly female, more concentrated in the younger age group (<30), and are more popular among students than other brands.

They are socially active (watch short videos or browse social media, hold parties), enjoying various entertainment activities and use their phones to take videos and selfies.

They require little in functions of the product, but focus on its trendy and personalized design; they also consider phone cases as a part of their fashion outfits.



Popsockets — functional and entertaining, popular with working women

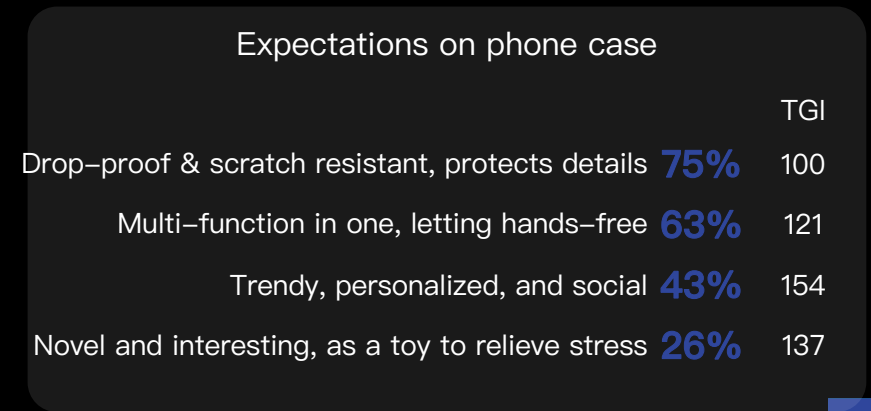
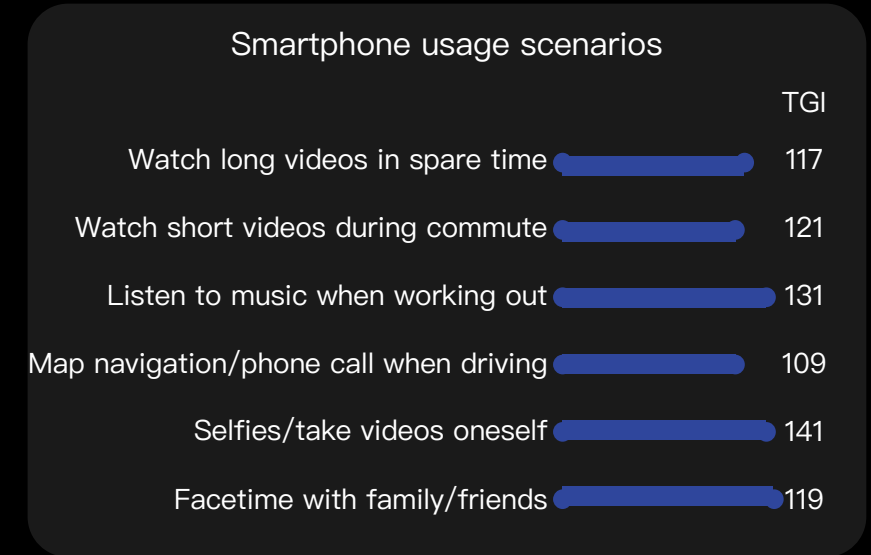
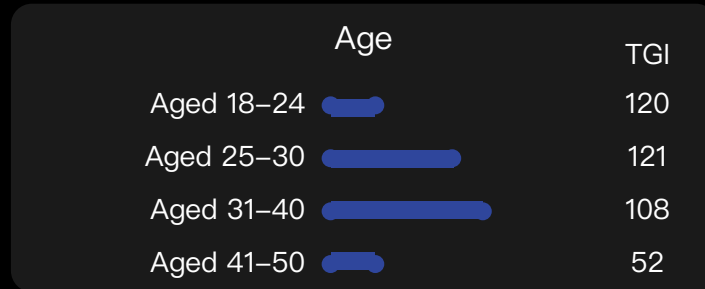
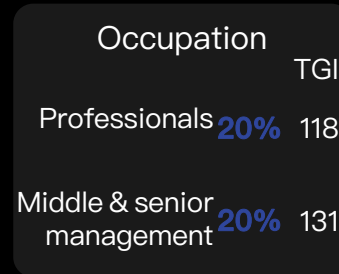
It recruits more young working female users in various entertainment and interaction scenarios. They enjoy their lives, and pursue functions rationally, and have demands for fashion and playability emotionally.

Popsockets brand summary:

It has more young working female users, especially middle-aged ones.

They are artistic and elegant, preferring to watch TV and live streaming, hang out with friends, do sports, outdoor activities, appreciate art and study gourmet cooking/baking. They have rich usage scenarios of phones, including watching videos, taking selfies and interacting with their family.

They have demand for phone cases being both rational and emotional: not only being anti-drop and having all-in-one functions like kickstand/magnetic suction, but also having a trendy and personalized appearance and being entertaining.



TORRAS — an expert in embedded kickstand cases and an innovative choice for white-collar workers pursuing quality life

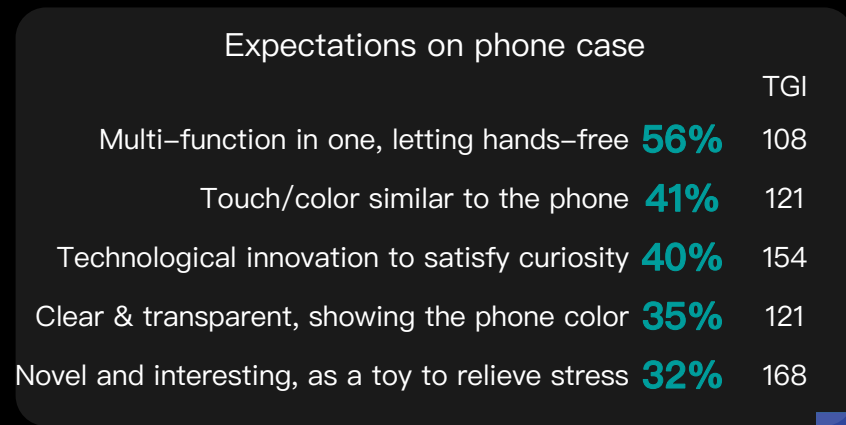
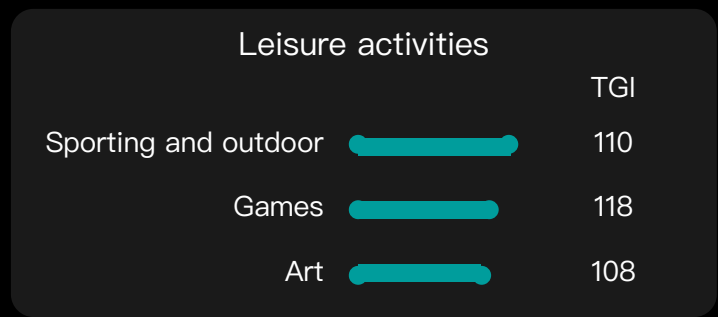
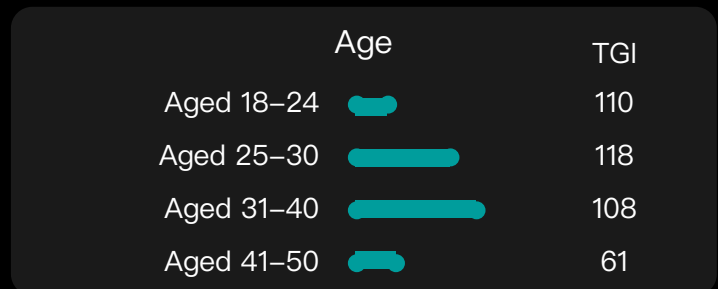
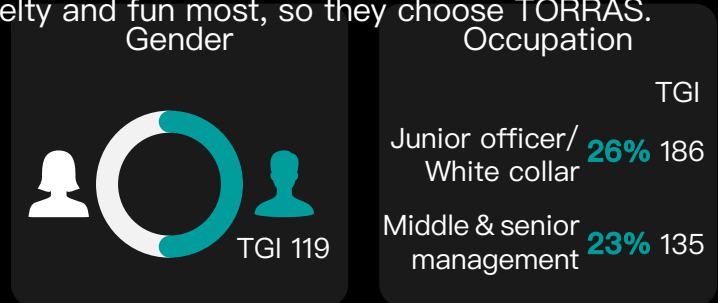
It attracts more users who are white-collar, pursuing quality life and using phones when working online, commuting and watching long videos. Therefore, they particularly like phone cases with all-in-one functions, and with color and touch similar to the phone, restoring the simple design of the original phone. They value technological innovation, novelty and fun most, so they choose TORRAS.

TORRAS brand summary:

TORRAS has more male users than other brands, who are relatively young white-collar and live in groups.

They prefer to play games, do exercise, participate in outdoor activities, and develop some artistic interests. Besides playing games and taking selfies, they have prominent needs for online working and watching long videos (especially the need for kickstand cases).

They also demand highly all-in-one functions (with a kickstand and magnetic suction) and hope the case's color and touch are similar to the phone, restoring the simple design of the original phone. They have higher expectations for the technological sense and design of phone cases to be novel, interesting and entertaining.



PART

FOUR

Mobile phone case
development trends

By 3.0 era, current phone cases can basically meet the requirements of drop-protection, being thin and light, good overall design; but the pain points of staining, yellowing and wearing out easily still exist; and the demands for heat dissipation, higher standard of protection, with kickstand and magnetic suction, also touch similar to the phone are increasing.

😊 Fulfilling product features/functions with current phone cases

General drop-protection 40%

Thin and light 36%

Overall good design 33%

😞 Common pain points with current phone cases

Without a magnetic back

Wears out easily

Stains easily

Heat dissipation

Fades/yellows easily

Impairs phone call/network signal

Without a kickstand

Unable to protect the screen

Not so drop-proof

Unable to protect the camera

Not as good as bare phone

Side buttons hard to press/prone to unintended activation

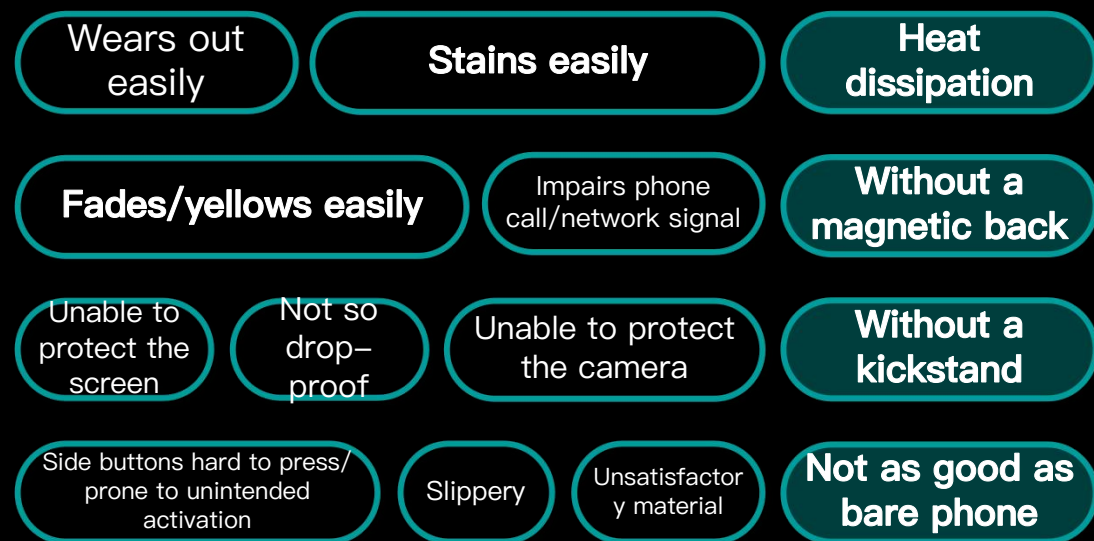
Slippery

Unsatisfactory material

Differences in the focus of consumers in different countries:

- Heat dissipation impaired with phone cases bothers Chinese consumers most;
- Consumers in Western countries are more eager for magnetic suction. Among them, American consumers value kickstand function more, while British consumers are more concerned about whether the touch of phone cases is similar to the phone.

☹️ Common pain points with current phone cases



37%
TGI: 161

Chinese consumers:

most dissatisfied with the impact of mobile phone cases on heat dissipation.

23%
TGI: 114

US/UK/German consumers:

expressing strong dissatisfaction with the lack of magnetic suction function in mobile phone cases.

23%
TGI: 128

American consumers:

more dissatisfied with mobile phone cases that do not come with a stand.

24%
TGI: 133

British consumers:

Having obvious feeling that the touch of phone cases is not as good as that of bear phones.

In order to meet consumers' higher demand, leading companies/brands strive to overcome the current major pain points/technical difficulties and provide solutions in the 3.0 innovation Era.

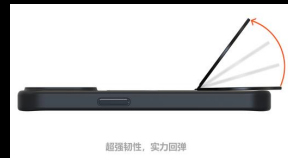
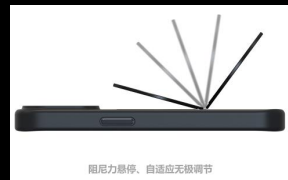
Heat dissipation solutions

Benks Ice armor cooling cases



Benks collaborates with university laboratories to develop a new type of heat dissipation gel, custom-made "fever-reducing patch" for high-load scenarios such as games and videos.

Kickstand phone case solutions



TORRAS Expert in kickstand phone case industry leader in kickstand and all-in-one functions phone cases,

TORRAS owns the patent for rotating stand, opening and closing design, pioneers multi-form kickstand cases, and achieves great breakthroughs in non-sensory bearing technology, which can achieve multi-angle support and stepless angle adjustment, as well as automatic rebound stickers. Among them, phone cases with 360° rotatable kickstand pushes the embedded kickstand cases to a new height.

Magnetic phone case solutions

With the introduction of MagSafe magnetic charging in iPhone 12, phone case products have once again launched a new product around this new technology — magnetic phone cases.

- General magnetic cases can basically achieve magnetic adsorption and do not affect wireless charging, but the magnetic charging ability is weak.
- The improved magnetic cases are comparable to the magnetic suction ability of the original machine, and support the perfect combination of MagSafe and wireless charging.



TORRAS Kickstand cases with magnetic functions

After connecting to the mobile phone, it can magnetically cooperate firmly with the mobile phone holder and wireless charger which further enhances the magnetic suction ability.



SPIGEN Magnetic phone cases

Upgraded magnetic protective case makes the charger and mobile phone case fit more closely through the magnetic accessories in the case and is not easy to loosen.

The functions and design that consumers expect most for future mobile phone cases are:

- 1) upgraded protection; 2) lightweight and portable; 3) Has all-in-one functions, letting hands-free, and 4) minimalist/same feeling as bare phone.

Phone cases

Future trends

76% **Upgraded drop protection and scratch resistance, detailed protection.**
Drop-proof & scratch resistant, better protect the phone and every detail (e.g. camera).

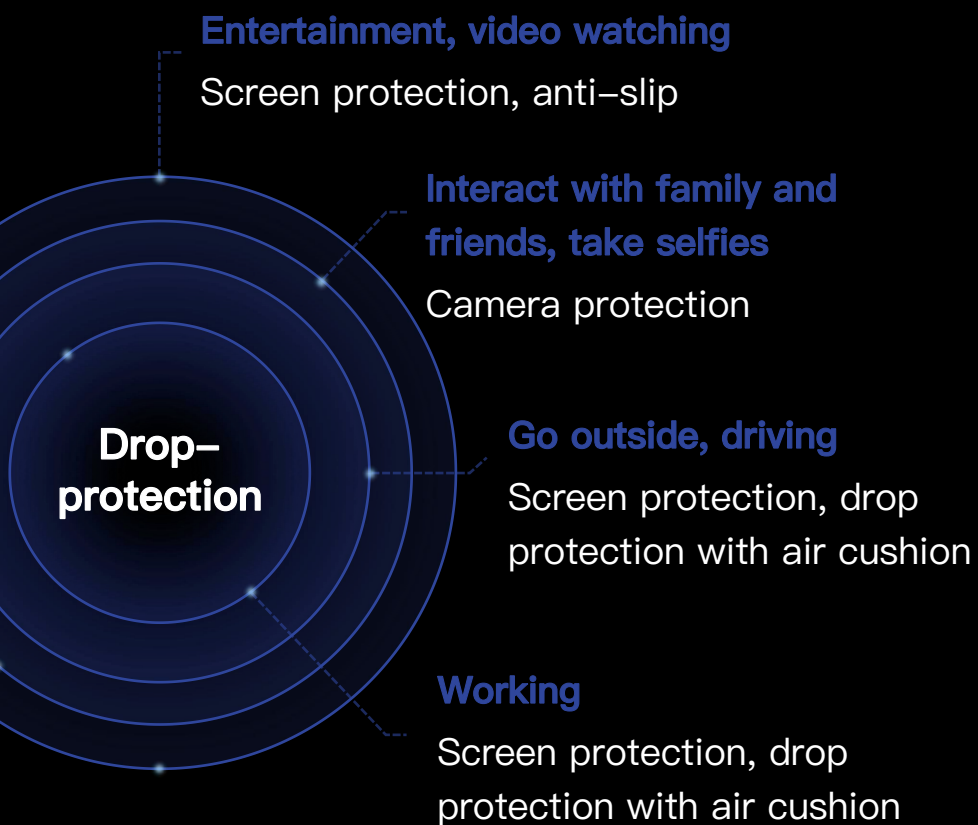
52% **Lightweight and portable.**
Thin and light phone case, with a moderate thickness, which will not prevent it from being put into a pocket or small bag, and is also easy to carry around.

52% **Powerful and all-in-one functions, letting hands free.**
Integrate multiple functions in one case, such as kickstand and magnetic suction, which can free consumers' hands.

59% **Same feeling as bare phone and minimalist design.**
Same feeling as bare phone and minimalist style creates a fashion taste with a sense of ease, which is simple and comfortable.

Upgraded protection, the demand for drop protection, scratch resistance, and detail care runs through all usage scenarios of smartphones.

In addition to the general drop protection, consumers focus more on upgraded protection when interacting with smartphones in different usage scenarios.



Consumers have a much higher standard of upgraded protection for future phone cases, not just “general protection”:

Currently fulfill		Expect to achieve
40%	General drop protection	49%
17%	Drop protection with air cushion	38%
28%	Camera protection	49%
29%	Screen protection	47%
30%	Scratch proof	49%
30%	Anti-slip	49%

Thin and portable phone cases empower outdoor activities and sports scenarios.

Consumers believe that “thin and light cases” are an important product feature of future phone cases; When they buy mobile phone cases, they tend to choose extremely thin and non-sensory products.



As the lifestyle of outdoor activities and sports develops into a national trend, the mobile use of smartphones becomes more frequent. Thin and portable phone cases can bring consumers convenience and energy when using smartphones:



WGSN: "Consumers are becoming more and more ecologically aware, and returning to nature. Eco-friendliness represents their emerging values. They hope to speak out for the rights and needs of the earth, and embrace nature and socialize with like-minded peers through outdoor activities such as cave camping, mountain hiking, and wilderness survival adventures."

A new combination of kickstand and magnetic suction, which achieves all-in-one functions and lets hands-free, bringing unprecedented convenience and energy to work and life.

Kickstand cases and magnetic cases have stood out in the 3.0 innovation era. As the new rational consumerism equipped with all-in-one functions, the future generation of products will continue to innovate and integrate functions to meet consumers' different demands in different scenarios, combining kickstand with magnetic suction to make the case more functional and further free consumers' hands:

From consumers' lens, the case with all in one (kickstand and magnetic suction) should be:

79%

Good overall protection, and the stand is drop-proof.

71%

Provide stable support, making the phone less prone to tipping over; also has a good bearing.

58%

All-in-one, kickstand + magnetic suction.

50%

Fully embedded and integrated with the phone case without adding any bulk.

70%

Higher level requirements: prop up in various ways/ steplessly adjustable/ automatically snaps back.

The all-in-one functions leads new rational consumerism. Consumers can reduce purchasing more phone cases, but buy only one "all in one" case to match the different use needs of multiple scenarios:

WGSN: "The downward pressure on the global economy is increasing, and the trend of consumers wanting to return to the use value of goods and services is gradually emerging: the minimalist life aesthetics represented by less is more has become a new value proposition. For consumers, there is no need to frequently change phone cases. The all-in-one configuration leads to a new rational consumerism and marks a new lifestyle."

Take kickstand cases expert TORRAS as an example

It perfectly combines the kickstand and the magnetic suction, allowing for more creativity in the shape and performance of the kickstand (pin/bearing quality, angle opening and closing, automatic **snaps back**), while further upgrading or strengthening the magnetic suction ability of the case, comprehensively considering the complex use of phones.



The same feeling as a bare phone and minimalist style create a fashion taste with a sense of ease, which is simple and comfortable.

During the post-2.0 era, when basic aesthetics and fashion design are brought to their extreme, consumers' phone cases at this stage generally have better appearance designs; but entering the post-3.0 era, consumers no longer blindly pursue a rich sense of design, but follow the trend of "returning to nature".

Consumers begin to pursue fashionable items with a sense of relaxation and comfort that don't require special shaping.



WGSN: "In terms of aesthetics, compared with the frigid style, the clean fit style is more refined. It cleverly uses basic items to create a relaxed and comfortable aesthetic style and pays attention to texture and fashion. Consumers now are increasingly pursuing simplicity to cater to themselves. They are keen to create a natural, casual, and elegant look through details."

TORRAS insists on simplifying complexity, using simple and spiritual design to achieve a pragmatic balance between ergonomic shape and ingenious details, leading to the avant-garde fashion aesthetics of wearable technology.



TORRAS – Products of the future generation.

Products of the future generation have been born: through continuous innovation and research and development, TORRAS integrates upgraded protection and thinness & portability, restoring the design style of bare phones. At the same time, it pioneers a new design of phone case with the combination of kickstand and magnetic suction, which performs excellently and has won many international design awards, patented innovations and industry honors, leading the development and progress of the kickstand and magnetic suction phone case products.

Upgraded protection:

TORRAS is committed to the development of an all-in-one phone case that is ultra-thin, non-sensory, and anti-drop, and has innovatively developed a number of drop protection technologies (four-corner anti-drop technology and lens edge airbag/cushioning airbag anti-drop technology): to achieve all-round cushioning protection and provide consumers visible and lightweight protection.



Same touch of bare phone, minimalist style:

TORRAS focuses on a simple design style that restores the color and feel of bare phone. It also introduces anti-yellowing (polymer materials film that resists and isolates yellowing factors) and anti-fingerprint technology (exclusive anti-fingerprint coating, which makes the case feel more skin-friendly & smooth), which stand out in the minimalist style.



Expert in kickstand cases:

TORRAS has the most abundant forms of kickstand case and is matched with a variety of colors, focusing on providing an invisible kickstand experience, using non-inductive bearing technology to achieve a flat back plate and damped suspension. It can automatically adapt to step-less adjustment, self-lock with one button, and lock accurately.



Integration of kickstand and magnetic suction:

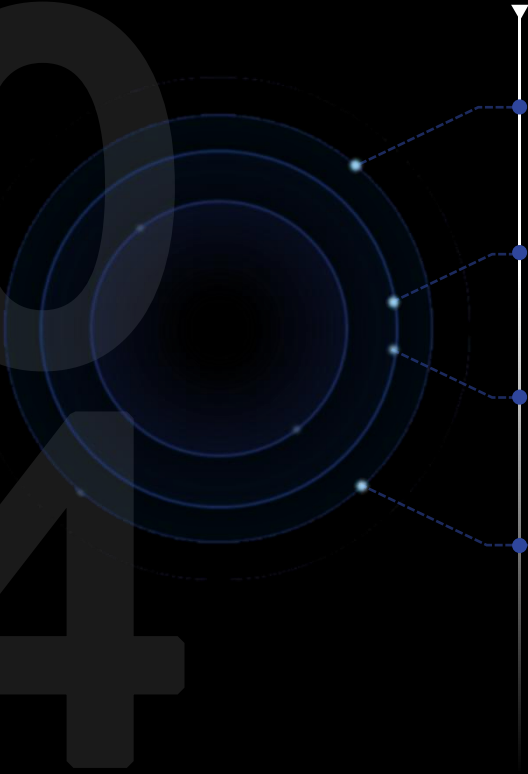
TORRAS is the creative pioneer in integrating kickstand with magnetic suction, which not only embeds invisible kickstand, but also enhances the MagSafe ability. TORRAS maintains the thinness and portability of case consistently, with more powerful function integration, comprehensively considering the complex use of phones, and further freeing up hands.



Conclusion: The future has come

As global consumers desire a healthy and balanced life, digital life has become more dominant, and smartphone usage scenarios have become diversified. The mobile phone cases with basic functions in the past are no longer enough to meet the new ways and new needs of consumers' mobile lives. What consumers need is mobile phone cases with upgraded functions and integrated multi-functions.

2024



Upgraded drop protection and scratch resistance, detailed protection

Lightweight and portable

Powerful and all-in-one functions, letting hands free

Same feeling as bare phone and minimalist design

Statement:

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TORRAS founded in 2012 and is a pioneer in providing a new lifestyle. With a strong curiosity about lifestyle trends, we strive to bring users the most futuristic products, including the Versatile 360° rotatable kickstand phone case for mobile phone case accessories and the hanging neck air conditioner for household appliances. Today, TORRAS is a leading brand, serving more than 600 million users in more than 148 countries. TORRAS has registered more than 1,300 patents worldwide and more than 40 international awards. Including Red Dot Award, iF Design Award, Muse Design Gold Award, and 40 other international awards.

As a global trend forecasting company, WGSN closely tracks the trends of designers, brands, fashion trends and business innovations through trend analysis, business information and accumulated reports and pictures, providing trend forecasts, creative inspiration and business information for fashion, life, design, retail, electronics and other industries.

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