

Smart Speaker Market - Global Outlook and Forecast 2018-2023

<https://marketpublishers.com/r/S8757D00278EN.html>

Date: June 2018

Pages: 226

Price: US\$ 4,000.00 (Single User License)

ID: S8757D00278EN

Abstracts

This market research report on smart speaker market offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by device type (first-party devices and third-party devices), by distribution (retail (specialty store, mass-market store, and electronic stores) and online channels), by end-users (residential users and commercial users), and by geography (APAC, Europe, North America, and ROW).

Smart Speaker Market - Overview

The proliferation technology that led to the transformation of customer's experience and human interaction is one of the primary factor driving the growth of the global smart speaker market. The leading vendors are leveraging voice-assistance technology that offers ease and convenience to end-users to gain a larger global market share. Some of the most popular virtual voice assistants such as Siri (Apple), Alexa (Amazon), Google Assistant (Google), and Cortana (Microsoft) are used across various smart appliances in the global market. The development of trade and manufacturing units, increasing investment in advanced economies, decreasing deflationary pressures, and increasing import demand from commodity-exporting developing and emerging markets will create a requirement for smart tech in the global market. The launch of new product model that is designed to provide ease-of-use along with a taste of innovation will drive the demand for these products in the global market. The rise in per capita income, high adoption of smart homes, and growth of dual-income households will result in the increasing spend on smart devices in the global market. The growing awareness about innovations and penetration of connected devices will create a demand for wireless speakers and other such products in the global market. The integration of voice-assistance technology in household appliances will augment the evolution of the global smart speaker market.

The exponential presence of online retailers such as Amazon, JD.com, and eBay offering a variety of products will augment the development of the global market. The launch of new products developed with ease of usage, connectivity, and skillsets, design, sensor technology, voice-recognition, signal transmission, and battery capacity will create revenue potential for vendors operating in this market. The global smart speaker market is estimated to reach revenues of approximately \$19 billion by 2023, growing at an impressive CAGR of around 31% during 2018-2023.

Smart Speaker Market – Dynamics

The exponential usage and popularity of broadband and internet connectivity across various countries in the world are augmenting the demand in the global smart speaker market. The rising number of deployment of LTE networks and the government initiatives to push for digital economies is leading to the use of the Internet and other smart devices in the global market. The technological advancements in the development of consumer applications have resulted in the integration of smart home or connected home in the global market. The development of smart homes has pushed end-users to adopt fast broadband connections or mobile internet across households in the market. For instance, advanced mobile networks such as LTE have reached about 58% of the global population according to the research analysts at Arizton. The rising popularity of connected homes will boost the demand in the global smart speaker market during the forecast period.

Smart Speaker Market - Segmentation

This market research report includes a detailed segmentation of the market by devices, end-users, distribution channels, and geography.

Smart Speaker Market – By Devices Type

First-party speakers introduced by Amazon and Google to dominate the global smart speaker market during the forecast period.

The devices type segment in the global smart speaker market is divided into first-party devices and third-party devices. First-party devices segment occupied the largest market share in 2017, growing at a CAGR of approximately 24% during the forecast period. The increasing collaborations with smart ecosystem providers is propelling the demand for new systems in this segment in the global market. Leading vendors such as

Amazon, Google, Apple, and Microsoft are leveraging its smart assistant platforms to introduce innovative products in the global market. The rapid improvement in audio quality and product designs will help manufacturers to gain a larger market share and attract new consumers over the next few years. For instance, Google Home Max by Google is an attempt to focus on sound quality as well as smartness of the speakers. Apple, living up to its reputation, focused on sound quality and launched HomePod in February 2018. Such innovations will boost the demand in the global smart speaker market.

Smart Speaker Market – By End-Users

The use of multi-room speakers to boost sales in the global smart speaker market during the forecast period

The global smart speaker market by end-users is segmented into residential users and commercial users. The residential end-users dominated the majority of the market share in 2017, growing at a CAGR of approximately 31% during the forecast period. These products are used by individuals who buy smart devices for home use or residential purposes in the global market. Some of the household are installing more than one product at home, thereby, boosting the revenues in this segment in the global market. The increasing application of these products as multi-room speakers will enable vendors to launch innovative products in the market. The increasing availability of Bluetooth-only speaker and allowing end-users to avail free calling facility in the US and Canadian region will attribute to the sales in this segment in the global market. Additionally, the improvement in economic conditions and rise in disposable income in emerging countries such as India and China will attribute to the growth of this segment in the global smart speaker market.

Smart Speaker Market – By Distribution Channel

Online retail segment to generate the highest revenues in the global smart speaker market during the forecast period

The distribution channel segment in the global smart speaker market is classified as retail (specialty store, mass-market store, and electronic stores) and online channels. Online channel occupied the largest market share in 2017, growing at a CAGR of over 21% during the forecast period. The growing number of online OEMs' e-commerce portals and online direct-to-consumer stores such as Amazon, eBay, Best Buy, Alibaba, and JD.com is augmenting the growth of this segment in the global

market. Factors such as ease-of-accessibility and convenience afforded by such channels are boosting the revenues of the online retail channel in the global market. The leading vendors are offering YouTube tutorial videos to help beginners to get knowledge of the working and set-up of voice-assistant speakers will ease in the global market. The increasing popularity of online stores in the UK, the US, and Germany will create lucrative opportunities for leading players in the global smart speaker market.

Smart Speaker Market – By Geography

The US leads the market share in North America in the global smart speaker market

The global smart speaker market by geography is segmented into APAC, Europe, North America, and ROW. North America dominated that largest market share in 2017, growing at a CAGR of more than 21% during the forecast period. The benefits of reliability, ease of installation, and convenience offered by these speakers are propelling the demand in the North American market. The top players are leveraging advanced technology to deliver high performance and user-friendly devices to attract new consumers and gain a larger market share in North America. The increasing purchasing power of millennials, growing adoption of smartphones, inclination toward new technology, and high urbanization are some of the factors boosting the demand for smart devices in the North American market. The US and Canada to emerge as the largest revenues generators in the global smart speaker market during the forecast period.

KEY COUNTRIES PROFILED

The key countries profiled in the report are:

US

Canada

China

South Korea

UK

Germany

Key Vendor Analysis

The global smart speaker market is witnessing the emergence of two major players such as Amazon and Google that are leading the competition level. The consumers' expectations regarding continual innovations and upgrades will encourage vendors to launch new products in the global market. The presence of diversified international vendors and a few regional vendors will boost the revenues in the market. The increasing number of product or service extensions, technological innovations, and M&A activities will intensify the competition level in the market over the next few years. The business expansion plans of key companies to fast-developing countries in APAC and Latin America will propel the growth of the global smart speaker market during the forecast period.

The major vendors in the global market are:

Alphabet (Google)

Amazon.com

HARMAN International

Alibaba Group

Sonos

Other prominent vendors include Anker Innovations, Apple, Avnera, Baidu, Beijing LingLong (JD.com), Deutsche Telekom, Fabriq, Facebook, Jam Audio , KaKao , KitSound by Kondor, KT, Invoxia, Lenovo , LG Electronics, Libratone, LINE Corporation, Mobvoi, Mycroft AI, NAVER Corporation, NVIDIA, Onkyo & Pioneer, Orange, Panasonic Corporation, Samsung, SK Telecom, Sony, Telefónica, Tencent, TIBO, Ultimate Ears, Xiaomi, Yandex

Key market insights include

1. The analysis of global smart speaker market provides market size and growth rate for the forecast period 2018-2023.

2. It offers comprehensive insights on current industry trends, trend forecast, and growth drivers about the global smart speaker market.
3. The report provides the latest analysis of market share, growth drivers, challenges, and investment opportunities.
4. It offers a complete overview of market segments and the regional outlook of global smart speaker market.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

REPORT SNAPSHOT

The global smart speaker market size is expected to reach revenues around \$19 billion by 2023, growing at an impressive CAGR of approximately 31% 2018–2023.

The global smart speaker market is driven by the development of futurist inventions in the mainstream voice-first and complementary technologies. The introduction of Echo Dot by Amazon, Home Mini by Google, Mi AI Speaker Mini by Xiaomi, and Tmall Genie by Alibaba Group will revolutionize the global market. The market research report provides in-depth market analysis and segmental analysis of the global smart speaker market by device type, by distribution channel, end-users, and geography.

Base Year: 2017

Forecast Year: 2018–2023

The study considers the present scenario of the global smart speaker market and its market dynamics for the period 2018–2023. It covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyzes the leading companies and various other prominent companies operating in the market.

Major Vendors in the Global Smart Speaker Market

Alphabet (Google)

Business Overview

Business Segments

Geography Segments

Alphabet (Google) in the Global Market

Major Product Offerings

Key Strategies

Key Strengths

Key Opportunities

Amazon.com

HARMAN International

Alibaba Group

Sonos

Prominent Players in the Global Smart Speaker Market

Anker Innovations

Overview

Product Offerings

Strategy

Strength

Apple

Avnera

Baidu

Beijing LingLong (JD.com)

Deutsche Telekom

Fabrig

Facebook

Jam Audio

KaKao

KitSound by Kondor

KT

Invoxia

Lenovo

LG Electronics

Libratone

LINE Corporation

Mobvoi

Mycroft AI

NAVER Corporation

NVIDIA

Onkyo & Pioneer

Orange

Panasonic Corporation

Samsung

SK Telecom

Sony

Telefónica

Tencent

TIBO

Ultimate Ears

Xiaomi

Yandex

Market Segmentation by Distribution Channel

Retail

Specialty Store

Mass Market Store

Electronic Stores

Online

Market Segmentation by End-users

Residential Users

Commercial Users

Market Segmentation by Geography

North America

US

Canada

APAC

China

South Korea

Europe

UK

Germany

ROW

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