

Smart Speaker Market in US - Industry Outlook and Forecast 2018-2023

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Abstracts

This market research report on US 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 end-users (retail and online), and by distribution channel (retail and online).

US Smart Speaker Market - Overview

The increasing number of consumers relying on smartphones for convenience of information is one of the primary factors promoting the growth of the US smart speaker market. The introduction of voice-assistance technology that can assist consumers and make their life convenient will transform the US market. The integration of prominent virtual assistant such as Siri (Apple), Alexa (Amazon), Google Assistant (Google), and Cortana (Microsoft) with smart applications is gaining immense traction in the US market. The economic growth that helps in the expansion of businesses with the access to finance sources, B2B marketing spends, and general economic activities will create lucrative opportunities for manufacturers in the US market. The growing preference for connected and smart devices is promoting the demand and sales in the US market. The launch of the new product model that provide ease-of-use along with a taste of innovation will lead to the introduction of various models such as wireless speakers, Bluetooth speakers, and others in the market. The introduction of speakers with voice technology and product innovations will transform the US market. The increasing number of dual-income households and in the spending capacity among consumers will generate higher revenues in the market. Such factors are propelling the growth of the US smart speaker market and boost demands during the forecast period.

The increasing acceptance of connected devices among various end-user sectors will propel the growth of the US market. The growing sales and improvement in consumer confidence and demand in the residential sector will help vendors reach a wider group of consumers in the market. The US smart speaker market is anticipated to reach revenues of around \$9 billion by 2023, growing at a CAGR of approximately 21% during 2018-2023. The report provides market share both in terms of revenue and unit shipment values.

US Smart Speaker Market – Dynamics

The rising investment in IoT by leading vendors is augmenting the development of the US smart speaker market over the next few years. The growing efforts to digitalize the economy, rising internet penetration, increasing internet speed, and use of smart home applications will transform the US market during the forecast period. The investments in IoT will help streamlining the manufacturing processes, supply chain management (SPM), and delivering more personalized customer experience in the market. The data collected from smart devices will help vendors analyze and share real-time data that provides valuable insights into user preferences. The companies leverage this data to market and advertise smart devices in the US market. The emergence of IoT will have a positive impact on product design, development, manufacturing, marketing, sales, aftersales, and offering seamless and customized consumer experience in the market. Furthermore, the use of IoT for product improvement will boost sales in the US smart speaker market.

US Smart Speaker Market - Segmentation

This market research report includes a detailed segmentation of the market by device type, end-users, and distribution channel.

US Smart Speaker Market – By Device Type

First-party devices to dominate the largest US smart speaker market during the forecast period

The US smart speaker market by device type is segmented into first-party devices and third-party devices. The first-party device segment dominated majority of the market share in 2017, growing at a CAGR of more than 13% during the forecast period. The leading players are focusing on improving the sound quality and product differentiation to gain a larger market share in this segment. Amazon and Google are the leading manufacturers in this segment in the US market. The increasing in number of

collaborations among top companies to provide smart eco-systems and improve their smart-assistant platforms will boost sales in this segment in the US market. Hardware vendors are leveraging their audio quality and design expertise to gain a larger market share and offer superior first-party devices in US. The focus on expanding product portfolios and technological innovations will drive revenues and sales in the US smart speaker market.

US Smart Speaker Market – By End-Users

Commercial end-users segment to grow the fastest in the US smart speaker market during the forecast period

The end-user segment in the US smart speaker market is classified into residential and commercial end-users. The commercial end-users segment occupied a significant market share in 2017, growing at a CAGR of approximately 33% during the forecast period. The commercial segment users use these smart devices across their smart offices, small retail stores, home offices, educational institutions, and among others. The growing popularity of these smart and wireless speakers across small home offices and educational institutions will propel the growth of the commercial end-user segment in the US market. The introduction of devices such as Echo Plus and Google Home Max are gaining immense popularity in the commercial end-user segment in the US. Furthermore, the launch of Amazon Show that find applications across smart offices in this segment will transform the US market. The launch of new and innovative products will propel the growth of this sector in the US smart speaker market.

US Smart Speaker Market – By Distribution Channel

Leading online OEM portals to control majority of market share in the US smart speaker market during the forecast period

The US smart speaker market by distribution channel is divided into online and retail (specialty stores (mono-brand), mass market players, and electronic stores). Online retail channels dominated the largest market share in 2017, growing at a CAGR of approximately 14% during the forecast period. The exponential growth of online OEMs' e-commerce portals and online direct-to-consumer stores such as Amazon.com, eBay.com, and Bestbuy.com is propelling the development of this segment in the US market. The companies are leveraging social media to promote and advertise their products and attract new consumers in the US market. The factors such as ease-of-accessibility and convenience afforded by such channels will boost revenues in the US market.

Key Vendor Analysis

The US smart speaker market is highly concentrated and the leading players control around 90% of the market share. The launch of new technologies such as Amazon Echo series and Google Home series is intensifying the level of competition in the US market. The top manufacturers are offering high functionality and designs to gain a larger market share and new consumers. The vendors are launching a diversified portfolio to sustain the competition in the US market. The increasing investments in R&D and commercialization costs will boost sales in the US market during the forecast period.

The major vendors in the US market are:

Alphabet (Google)

Amazon.com

HARMAN International (Samsung)

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 Corporation, Invoxia, Lenovo, LG Electronics, LIBRATONE, LINE Corporation, Mobvoi, Mycroft AI, NAVER Corporation, NVIDIA, Onkyo & Pioneer, Orange, Panasonic Corporation, Samsung Electronics, SK Telecom, Sony, Telefonica, Tencent, TIBO, Ultimate Ears (Logitech), Xiaomi, and Yandex.

Key market insights include

1. The analysis of US 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 US 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 US 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 US smart speaker market size is expected to reach revenues of around \$9 billion by 2023, growing at an impressive CAGR of approximately 21% 2018–2023.

The US smart speaker market is driven by the introduction of speakers with voice technology. The increasing focus on product innovations and growing demand for connected devices will boost sales and revenues in the US market. The market research report provides in-depth market analysis and segmental analysis of the US smart speaker market by device type, distribution channels, and end-users.

Market Size:

Revenue

Unit Shipment

Base Year: 2017

Forecast Year: 2018–2023

The study considers the present scenario of the US 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 US Smart Speaker Market

Alphabet (Google)

Business Overview

Business Segments

Geography Segments

Alphabet (Google) in the US Market

Major Product Offerings

Key Strategies

Key Strengths

Key Opportunities

Amazon.com

HARMAN International (Samsung)

Sonos

Prominent Players in the US Smart Speaker Market

Anker Innovations

Overview

Product Offering

Strategies

Strengths

Apple

Avnera

Baidu

Beijing LingLong (JD.com)

Deutsche Telekom

Fabrig

Facebook

JAM Audio

KaKao

KitSound by Kondor

KT Corporation

Invoxia

Lenovo

LG Electronics

LIBRATONE

LINE Corporation

Mobvoi

Mycroft AI

NAVER Corporation

NVIDIA

Onkyo & Pioneer

Orange

Panasonic Corporation

Samsung Electronics

SK Telecom

Sony

Telefonica

Tencent

TIBO

Ultimate Ears (Logitech)

Xiaomi

Yandex

Market Segmentation by Device Type

First-Party Devices

Third-party Devices

Market Segmentation by End-User Type

Residential End-users

Commercial End-users

Market Segmentation by Distribution Channel

Retail

Specialty Stores (Mono-Brands)

Mass Market Players

Electronic Stores

Online

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