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Social Robots Market Report by Component (Hardware, Software, Services), Technology (Machine Learning, Computer Vision, Context Awareness, Natural Language Processing), End Use Industry (Healthcare, Education, Media and Entertainment, Retail, and Others), and Region 2024-2032

https://marketpublishers.com/r/S3E84E7B6C4FEN.html
Date: September 2024
Pages: 142
Price: US$ 3,509.00 (Single User License)
ID: S3E84E7B6C4FEN

Abstracts

The global social robots market size reached US$ 4.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 36.6 Billion by 2032, exhibiting a growth rate (CAGR) of 25.2% during 2024-2032. The advancements in AI and robotics, rising demand for personalized and companionable devices, growing applications in healthcare and education, increasing automation and efficiency needs, societal aging and labor shortages, and technological affordability and accessibility are some of the major factors propelling the market.

Social robots are advanced machines designed to interact and engage with humans in a social manner. These robots are equipped with artificial intelligence (AI) and sensors that allow them to perceive and respond to human cues, such as facial expressions, gestures, and speech. They are programmed to simulate human-like behaviors, including conversation, empathy, and even displaying emotions. They have a wide range of applications across various industries. In healthcare, they can provide companionship and support to patients, assist in therapy sessions, or serve as reminders for medication schedules. In education, they can facilitate interactive learning experiences and personalized tutoring. Additionally, these robots are used in customer service to provide assistance and information, enhancing the overall user experience.

The rapid progress in AI and robotics technologies has significantly enhanced the

capabilities of social robots. Improved natural language processing, facial recognition, and gesture detection enable robots to better understand and respond to human interactions, increasing their social interaction capabilities. Additionally, there is an increasing demand for devices that can provide companionship, emotional support, and personalized services. Social robots, with their ability to simulate human-like behaviors, offer a unique solution to meet these needs. They can provide companionship to the elderly, assist individuals with disabilities, and engage children in educational activities. Other than this, the healthcare and education sectors have witnessed a surge in the adoption of these robots. In the healthcare sector, these robots help monitor patients, provide therapy, and assist them with rehabilitation. In the education industry, they support personalized learning, tutor students, and facilitate interactive experiences. Besides this, these advanced robots are being deployed in various industries to automate repetitive tasks, improve efficiency, and enhance customer experiences. They can be used in retail environments for customer service, in hospitality for concierge services, and in banking for information and assistance. In line with this, with aging population and labor shortages in certain sectors, social robots offer a solution to fill the gaps. They can provide support and assistance to the elderly, reducing the burden on caregivers, and help alleviate the impact of labor shortages in industries such as healthcare and caregiving. Moreover, as technology advances, the cost of developing and manufacturing robots is decreasing, making them more accessible to businesses and individuals.

Social Robots Market Trends/Drivers:

Advancements in Artificial Intelligence (AI) and Robotics

AI technologies, such as natural language processing, machine learning and computer vision, have greatly improved the capabilities of social robots. Natural language processing enables robots to understand and respond to human speech, while machine learning allows them to continuously learn and adapt to better interact with humans. Additionally, computer vision techniques enable robots to recognize and interpret facial expressions, gestures, and emotions, enhancing their social interaction abilities. These advancements have made robots more intelligent, intuitive, and responsive, leading to increased acceptance and adoption. They have enabled robots to simulate human-like behaviors, creating more engaging and meaningful interactions with users. As AI and robotics continue to progress, social robots are expected to become even more sophisticated, capable of understanding complex human emotions, context, and individual preferences, further driving their integration into various industries.

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Growing Applications in Healthcare and Education

In healthcare, social robots are being utilized to provide companionship and support to patients, particularly the elderly and individuals with disabilities. They can engage in conversation, monitor vital signs, assist with medication reminders, and even serve as therapy aids. These robots offer a solution to address the challenges of limited human resources and provide emotional support to patients, improving their overall well-being. Similarly, in the education sector, these robots are being deployed to enhance learning experiences. They can act as tutors, providing personalized instruction and feedback to students. They engage in interactive activities, promote student participation, and adapt their teaching methods based on individual learning styles. By leveraging the interactive and engaging nature of social robots, educational institutions are able to create more immersive and effective learning environments.

Integration of robots into smart home ecosystems

With the rise of smart home technology, social robots were being integrated as personal assistants, capable of controlling smart devices, providing reminders, and managing household tasks. They can interact with various smart devices, such as smart thermostats, lighting systems, security cameras, and entertainment systems. By acting as a hub, these robots enable users to control their smart home devices through voice commands or intuitive interfaces. These robots help automate repetitive tasks in a smart home. For instance, they can be programmed to turn on lights at specific times, adjust the thermostat based on preferences, and initiate specific actions when certain conditions are met.

Social Robots Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global social robots market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on component, technology and end use industry.

Breakup by Component:

- Hardware
- Software

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Services

The report has provided a detailed breakup and analysis of the market based on the component. This includes hardware, software, and services.

The hardware component of the market refers to the physical structure and components of the robots themselves. This includes the robot's body, sensors, actuators, cameras, and other physical components. The hardware segment represents a significant portion of the market, as it encompasses the manufacturing and production of the physical robots. Companies specializing in robotics hardware design and production play a crucial role in supplying social robots to various industries.

The services component of the market focuses on the support and maintenance services associated with social robots. This includes installation, training, customization, and ongoing technical support provided to clients. As the adoption of robots increase, the demand for services such as robot deployment, programming, and integration into existing systems grows. Service providers play a vital role in ensuring that these robots are effectively implemented and optimized for specific applications and customer requirements.

The software component of the market refers to the programming, algorithms, and AI systems that enable robots to perform their tasks and interact with humans. This includes natural language processing, machine learning, computer vision, and other AI technologies that enable robots to understand and respond to human commands and gestures. The software segment is critical in enhancing the intelligence and capabilities of social robots, enabling them to learn, adapt, and provide personalized experiences. Companies specializing in robotics software development and AI algorithms contribute to the growth and innovation in the market.

Breakup by Technology:

Machine Learning

Computer Vision

Context Awareness

Natural Language Processing

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A detailed breakup and analysis of the market based on technology has also been provided in the report. This includes machine learning, computer vision, context awareness, and natural language processing.

Machine learning is a key technology driving the market. It enables robots to learn from data and experiences, improving their ability to understand and respond to human interactions. Machine learning algorithms analyze patterns, recognize speech, and make predictions, allowing social robots to continuously enhance their performance and adapt to individual user preferences. This technology plays a vital role in personalizing interactions, providing intelligent recommendations, and enabling these robots to become more intuitive and effective in various applications.

Computer vision technology enables social robots to perceive and interpret visual information from their surroundings. It involves algorithms and techniques that allow robots to recognize and understand objects, faces, gestures, and emotions. With computer vision, social robots can track movements, detect and recognize individuals, and respond appropriately based on visual cues. This technology enhances the robot's ability to engage in meaningful interactions, facilitate visual communication, and provide contextually relevant responses to users.

Context awareness is a crucial technology for social robots to understand and respond appropriately in different situations. By analyzing environmental factors such as location, time, and user behavior, these robots can adapt their behavior and tailor their responses accordingly. Context-aware robots can understand social norms, adjust their language and actions, and provide personalized experiences. This technology enables robots to deliver relevant and timely information, anticipate user needs, and enhance the overall user experience.

Natural language processing (NLP) is a technology that enables these robots to understand and generate human language. It involves techniques for speech recognition, language understanding, and language generation. NLP enables robots to comprehend spoken commands, engage in conversations, and respond to user queries. It allows for more natural and intuitive human-robot interactions, facilitating effective communication and enabling robots to provide information, instructions, or emotional support through spoken language.

Breakup by End Use Industry:

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Healthcare

Education

Media and Entertainment

Retail

Others

Healthcare dominates the market

The report has provided a detailed breakup and analysis of the market based on the end use. This includes healthcare, education, media and entertainment, retail, and others. According to the report, healthcare represented the largest segment.

The healthcare sector has a growing need for technological solutions that can improve patient care, enhance efficiency, and address the challenges associated with an aging population. Social robots offer unique capabilities to meet these requirements. They can provide companionship and support to patients, assist in therapy sessions, and even help with medication management. The ability of these robots to engage in empathetic and personalized interactions makes them particularly valuable in healthcare settings where emotional support and companionship are crucial. Additionally, the healthcare industry often faces labor shortages, especially in caregiving and elderly care. They can help alleviate this strain by assisting healthcare professionals in routine tasks, monitoring patients' vital signs, and providing basic care. By integrating social robots into healthcare workflows, organizations can optimize their resources, improve efficiency, and ensure consistent quality of care even in the face of staffing challenges. Moreover, they have proven to be effective in therapeutic applications. They can support individuals with autism spectrum disorders, assist in rehabilitation programs, and provide cognitive stimulation for patients with dementia. The healthcare industry recognizes the potential of robots in improving patient outcomes and has been at the forefront of adopting and implementing these technologies

Breakup by Region:

North America

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United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

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Mexico

Others

Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the social robots market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, Others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, Others); Latin America (Brazil, Mexico, Others); and the Middle East and Africa. According to the report, Asia Pacific was the largest market.

Asia Pacific is home to some of the world's largest and fastest-growing economies, including China, Japan, South Korea, and Singapore. These countries have a strong focus on technological innovation and are actively investing in robotics and AI research and development. The region's robust manufacturing capabilities and technological expertise have allowed for the production and deployment of these robots on a large scale. Additionally, the cultural factors in Asia Pacific play a significant role in driving the product adoption. In countries like Japan, there is a long-standing tradition of integrating robots into society, where they are seen as companions and assistants. The concept of humanoid and social robots resonates well with the cultural values and perceptions of technology in the region. The aging population in countries like Japan and South Korea also creates a product demand in healthcare and elderly care settings, where they can provide companionship and assistance. Other than this, the region has a strong focus on education and technological advancements in sectors such as healthcare, manufacturing, and hospitality. The region's growing middle class and rising disposable income levels have led to increased demand for personalized services and interactive experiences. Social robots, with their ability to provide engaging and interactive interactions, are well-suited to meet these demands in education, customer service, and entertainment industries.

Competitive Landscape:

The leading companies in the market are heavily investing in R&D to advance the

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technology and capabilities of social robots. They focus on improving natural language processing, machine learning algorithms, computer vision, and context awareness to enhance the robots' ability to understand and respond to human interactions. R&D efforts also aim to develop more sophisticated emotional intelligence, social skills, and adaptability in these robots. Additionally, key players often engage in collaborations and partnerships with technology companies, research institutions, and end-user industries. These partnerships facilitate knowledge sharing, joint R&D projects, and co-creation of innovative solutions. Collaborative efforts help leverage expertise from multiple domains and accelerate the development and adoption of robots across various industries. Other than this, manufacturers are increasingly focusing on offering industry-specific solutions. They work closely with customers to understand their unique needs and develop tailored social robots for specific applications. This approach ensures that the robots meet the requirements and challenges of industries such as healthcare, education, retail, and hospitality, delivering optimized performance and value.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

AlterG Inc.

Bionik Laboratories Corp.

Blue Frog Robotics SAS

Blue Ocean Robotics ApS

Embodied Inc.

Furhat Robotics AB

Haapie SAS

Intuition Robotics Ltd.

Knightscope Inc.

Motorika USA Inc.

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MOVIA Robotics Inc.

SoftBank Robotics (SoftBank Group)

Recent Developments:

Intuition Robotics Ltd. has recently made advancements in the field of social robots. One notable development is their creation of ElliQ, a digital care companion designed specifically for older adults to establish relationships with humans and influence behaviors and emotions through digital companion agents, enabling a more interactive and personalized experience.

In March 2023, SoftBank Robotics UK (SBRUK), the EMEA arm of the global leader in collaborative robotics (cobotics), announced a strategic partnership with Bunzl Distribution Spain. The strategic partnership will expedite the deployment of robotics' solutions across many sectors in the Spanish region such as lodging, facility care, healthcare, food service, catering, industrial or retail.

Furhat Robotics AB acquired business assets of US-based Misty Robotics. This acquisition is aimed at accelerating the development and advancement of the next generation of social robots.

Key Questions Answered in This Report

1. What was the size of the global social robots market in 2023?

2. What is the expected growth rate of the global social robots market during 2024-2032?

3. What are the key factors driving the global social robots market?

4. What has been the impact of COVID-19 on the global social robots market?

5. What is the breakup of the global social robots market based on the end use industry?

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6. What are the key regions in the global social robots market?

7. Who are the key players/companies in the global social robots market?

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