

Consumer Audio Suite of Services

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B2C CATEGORY OVERVIEW

Audio/Visual	Personal Electronics	Infotainment	Smart Home	Entertainment	Gaming	Storage Media	Automotive
TV	Personal headphones/TWS	Smartphone	Locks	Box Office	Gaming Headsets	PC DRAM	Aftermarket Audio
Media Streamer	Hearing Aids/OTC Hearing Aids	Feature Phone	Lights	Pay-TV	Keyboards	Gaming DRAM	Head Unit Integration
Set Top Box	Smartwatch	Tablet	Climate Control	iVoD	Mice	Client HDD	
DVD Player	Activity Tracker	PC	Doorbells	Pay-TV VoD	Gaming Speakers	NAS HDD	
Blu-ray Player	Sport Watches	Laptop	Hubs	EST	Gaming Controllers	SSHD	
Wireless Speaker	VR HMD	2 in 1	Power	DVD	Simulation	Client SDD	
Soundbar	AR Glasses		Major Domestic Appliance	Blu-ray	Consoles	NAS SSD	
Loudspeaker				Music Streaming	Gaming Handhelds	Gaming SSD	
AV Receiver				Music Download	Physical Full Game	Regular EXT HDD	
Hi-Fi System				CD	Digital Full Game	Gaming EXT HDD	
				Vinyl	Subscription	Regular EXT SSD	
					DLC	Gaming EXT SSD	

CONSUMER RESEARCH

Audio Tech Lifestyles
Living With Digital
Kids Tech
Smart Home
Content Creator
Evolution of the Gamer

B2C SERVICE OVERVIEW

We provide a wide range of specialist intelligence reports and ongoing personal debriefs to support B2B technology businesses with their decision-making. All services are tailored to the needs of our clients and designed to deliver the best possible results.

AUDIO / VISUAL	PERSONAL ELECTRONICS	INFOTAINMENT	STORAGE MEDIA	ENTERTAINMENT	GAMING	SMART HOME
TV Media Streamer Set Top Box DVD Player Blu-ray Player Wireless Speaker Soundbar Loudspeaker AV Receiver Hi-Fi System	Professional Headphones/TWS Hearing Aids/OTC Hearing Aids Smartwatch Activity Tracker Sport Watches VR HMD AR Glasses	Smartphone Feature Phone Tablet PC Laptop 2 in 1 AUTOMOTIVE Aftermarket Audio Head Unit Integration	PC DRAM Gaming DRAM Client HDD NAS HDD SSHD Client SDD NAS SSD Gaming SSD Regular EXT HDD Gaming EXT HDD Regular EXT SSD Gaming EXT SSD	Box Office Pay-TV iVoD Pay-TV VoD EST DVD Blu-ray Music Streaming Music Download CD Vinyl	Gaming Headsets Gaming Speakers Keyboards Mice Gaming Controllers Simulation Consoles Gaming Handhelds Physical Full Game Digital Full Game Subscription DLC	Locks Lights Climate Control Doorbells Hubs Power Major Domestic Appliance

CONSUMER RESEARCH

- Audio Tech Lifestyles
- Living with Digital
- Content Creator
- Evolution of the Gamer
- Kids Technology
- Smart Home
- Shopper Journey



DIRECT DATA FEEDS

Up-to-date, structured product data from vendors and distributors, split by geography, key specification, application and more.



IN-HOUSE EXPERTS

Informed regional expertise from trusted specialists. Additional strategic commentary and value-add information available through regular client debriefing sessions.



DEDICATED RESEARCH

In-depth exploration of product portfolios, industry publications and company reports. Supported by trade association insights, adjacent markets and government statistics.



INDUSTRY INTERVIEWS

Qualitative and quantitative interviews to validate our industry data and build a wider understanding of market dynamics.



Market Reports

HEADPHONES MARKET REPORT

This headphones market research report provides an updated outlook for the sector worldwide, supplying actual market data and forecasts over a five-year period. Our team of Futuresource analysts has assessed trends in TWS, open-ear, over-ear and other form factors .

The report provides a strategic framework for any enterprise with interests in the earphones and headphones market.

This bi-annual report looks at the demand and supply trends, by country and region, as well as discusses the feature trends and competitive landscape.

Key features of the report:

Market sizing, global retail value, shipment volumes and installed base of aftermarket headphones.

Five-year market forecasting focusing on key form factors.

Detailed analysis, broken down into six regions and 19 countries with more granular data on feature breakouts, price segmentation, and brand shares.

Data Segmentation

- | **Product and Features:** TWS, Over-ear Headphones, Open-Ear/OWS, Sport Headphones, Spatial Audio, ANC, BTLE.
- | Developments in Sound Processing technologies.
- | **Key Metrics:** Volume, value, price point & brand share
- | **Geographic Coverage:**
 - **Regions** - North America, Latin America, Western Europe, Eastern Europe, META, APAC
 - **Countries**- USA, Canada, Brazil, France, Germany, Italy, Spain, Norway, Denmark, Sweden, Finland, UK, Netherlands, Switzerland, Russia, Japan, China, India, South Korea, Australia.
- | **Pricing Trends** across all countries
- | **Five-Year Forecasts** across all data points

Key Questions

- | How are the various form-factors performing? Has TWS demand saturated?
- | What challenges face the sector?
- | What are the brand shares and who are the brand leaders?
- | What are the upcoming technologies that will drive growth? Are software developments growing in importance?

HOME AUDIO MARKET REPORT

Futuresource has been tracking, researching and consulting on the CE landscape for the last 30 years. This publication is one in a series of research reports, produced to provide businesses with a fully rounded view of the market.

This bi-annual home audio market report provides an updated outlook for global developments in wireless speakers, soundbars, A/V receivers, smart speakers and Hi-Fi system markets.

The report provides a strategic framework for any enterprise with interests in the home audio equipment market.

Any business operating within the home audio space and related sectors will benefit from this report, particularly manufacturers and their suppliers, intermediaries and supply chain, retailers, CE market strategists, marketing and sales professionals, and investors.

Key features of the report:

This report gives an updated outlook for the worldwide home audio market.

Qualitative analyst insight supports all the data, diving into the underlying trends driving the numbers and explaining what this means for the market moving forward.

Data Segmentation

- | **Pricing Trends**
- | **Products:** Bluetooth speakers, Wi-Fi speakers, soundbars, Hi-Fi systems, A/V receivers
- | **Geographic Coverage:** Across USA, Canada, France, Germany, Italy, Spain, Belgium, Denmark, Finland, Greece, UK, Netherlands, Norway, Sweden, Switzerland, Japan, China, Australia, India, Turkey, Brazil, Mexico, Russia, Poland, Czech Republic & Eight Regions
- | **Territory:** Regional & country level data for all metrics
- | **Five-Year Forecasts** across all data points

Key Questions

- | What is the outlook for smart speakers & is there future growth?
- | How are traditional brands fairing against their tech rivals?
- | What are the primary drivers and inhibitors for growth?
- | Which countries and regions are expected to drive the strongest volume and value growth in the future?
- | What is the long-term outlook for immersive audio technologies such as Dolby Atmos and DTS:X?
- | How will pricing trends develop in the future?

HEARING HEALTH MARKET REPORT

This global hearing health market report provides an updated outlook for developments in the hearing aids, otc and consumer hearables devices market.

The report acts as a strategic framework for any enterprise launching into the consumer or medical grade hearing health segment with hearing support and related features.

This report will aim to explore the landscape of consumer hearables, drawing together research from across Futuresource's different reports and diving deeper into the future potential of such devices. Particularly, this report will emphasize the growing role hearables will play in health and wellbeing applications with the ear recognised as an ideal body part to reliably measure and identify health related issues.

Key features of the report:

Product, technology and competitive reviews, interpreting key market developments and trends.

Key feature development and penetration.

Market sizing, by quantifying and tracking worldwide sales of hearables and hearing aids.

Market forecasting, with five-year sales forecasts.

Data Segmentation

- | **Product coverage:** medical-grade hearing aids, OTC hearing aids, PSAPs, consumer hearables with hearing features.
- | **Market Influencers:** Regulatory Environment, Hearing Loss, The Evolving Use Case for Hearables
- | **Technology Developments:** AI and the role of software advancements in hearing, sound personalisation tech, developments in sensors
- | **Geographic Coverage:**
 - **Regions** - North America, Latin America, Europe, META, APAC
 - **Countries**- USA, Canada, France, Germany, UK, Japan, China, India.
- | **Five-year Forecasts across all Data-Points**

Key Questions

- | What is the expected volume and value growth?
- | Which product specs are performing well?
- | How are hearables likely to compete with traditional hearing aids? How rapidly will hearing aids features penetrate consumer hearables/TWS?
- | What are the growth drivers and inhibitors for the OTC hearing aids segment?

LOUDSPEAKER MARKET REPORT

Gain access to crucial updates on Bookshelf and Floor Standing Speakers, In-wall/In-Ceiling Speakers, Home Theatre Speakers, Computer Aftermarket Speakers, and the recently integrated category of Outdoor Speakers with this report.

Due to the pandemic, there has been a significant increase in the demand for loudspeakers. This is mainly due to people spending more on audio products in order to enhance their at-home entertainment experience. Additionally, the surge in demand can also be attributed to younger demographics who were introduced to hi-fi via vinyl and are now investing in loudspeakers for the first time.

A shift from a mobile-driven society to a population being more home-focused is likely to help maintain a strong demand for loudspeakers with people more willing to invest in high-end products as they can spend more time enjoying them.

Key things to know about this report:

Breaks down the total Loudspeaker market by region, with five-year forecasts.

Value and pricing was collected in local currency, then converted using the exchange rates in the appendix.

Shipment data is at sell-in level.

Data Segmentation

- I **Geographical Coverage:** Americas, EMEA, APAC
- I **Products:** Bookshelf, Floorstanding, In-Wall/In-Ceiling, Aftermarket Computer, Home Theatre, Outdoor Speakers.
- I **Five-year Forecasts**
- I **ASP Developments**

Key Questions

- I What is the annual performance and expectations by category?
- I What is the impact of supply challenges on the loudspeaker market?
- I What is the market snapshot per region?
- I What does the competitive landscape look like?

WEARABLES MARKET REPORT

This global wearables market report provides an updated outlook for developments in wrist-worn devices. Products covered include sports watches, activity trackers, and smart watches. Futuresource will provide highlights on the kids watches and smart rings segment in this report.

This bi-annual report reviews key developments in the market by product group, brand, feature, and provides a five-year outlook as well as providing a review of new product and category roadmaps.

The report acts as a strategic framework for any enterprise launching wearable tech or operating within the wearables market and its adjacent sectors.

Key features of the report:

Market sizing, by quantifying and tracking worldwide sales of technologies in wrist-worn wearables.

Market forecasting, with five-year sales forecasts, reviewing key product types and feature sets.

Product, technology and competitive reviews, interpreting key market developments and trends.

Data Segmentation

- | **Geographic Coverage:** North America - USA , Canada, Latin America – Brazil, Rest of Latin America, EMEA - France, Germany, UK, Nordics, Spain, Italy, Russia, Belgium, APAC - China, Japan, Australia, India, South Korea
- | **Product Categories:** sports watches, activity trackers, smartwatches, kids' watches, smart rings.
- | **Five-Year Forecasts** across all data points

Key Questions

- | What is the outlook for wrist worn wearables as the various segments merge in features and style?
- | How are market trends varying across regions?
- | What is the outlook for smart rings?

LUXURY AUDIO MARKET REPORT

This report provides an updated assessment of the global Luxury Audio Equipment market. This service also looks at the key market drivers, the music market evolution, plus provides in-depth analysis per product category and highlights interesting initiatives that are helping to raise awareness and create demand.

The methodology involved a combination of leveraging in-house market figures and expertise, and original research with vendors and channel partners operating within the Luxury Audio market.

Luxury audio products are defined as those that cost more than \$5,000 per unit or \$10,000 per pair in the case of loudspeakers. This is based on list price, rather than the actual selling price.

Key things to know about this report:

A detailed excel spreadsheet accompanies this report.

The data in this report is based on original primary research conducted by a team of audio market specialists at Futuresource Consulting.

Luxury Audio products are defined as those that cost more than \$5,000 per unit, or \$10,000 per pair in the case of Loudspeakers.

Data Segmentation

- I **Products:** Soundbars, Loudspeakers, 2 Channel Amps/Receivers, Multichannel Amps/Receivers, Sound Processors, Turntables, Headphones, Wireless Speakers
- I **Geographical Coverage:** Americas, EMEA, APAC
- I **Annual Performance & Expectations by Category**
- I **Volume & Value share**

Key Questions

- I What is the total luxury audio market, by region?
- I Which category will have the highest YoY growth by volume?
- I What is the impact of socio-economic developments?

MUSIC STREAMING MARKET REPORT

This report focuses on insights and analysis relating to the streaming music subscription market and competitive environment, in the context of the wider music market, highlighting key service developments, uptake and characteristics.

This report also complements Futuresource's wider work in the audio sector, including its ongoing detailed tracking of the audio hardware markets and its annual *Audio Tech Lifestyles consumer survey*.

One key highlight of the report is the discussion of the competitive landscape, as well as the detailed profile with strategy, SWOT, key initiatives, pricing and distinctive features of the leading brands within this space.

Key features of the report:

Insights and analysis relating to the overall music market, with a focus on the streaming music subscription segment and the competitive landscape.

A focus on opportunities, developments and services within the marketplace.

Data Segmentation

- | **Brands:** Spotify, Apple Music, Amazon Music, YouTube Music & Deezer
- | **Geographic Coverage:** North America, Western Europe, China, India, Rest of World
- | **Territory:** Regional & country level data for all metrics
- | **Five-Year Forecasts** across all data-points
- | **Qualitative Analyst Insight** supports all the data
- | **Context:** Comparative metrics across physical & digital download segments

Key Questions

- | What does the competitive landscape look like?
- | What are the subscription numbers by service and region?
- | What are the key growth drivers?

MUSIC/ VINYL MARKET REPORT

This report focuses on the developments in the music & vinyl market. It notably reviews the performance of the market in the current year and the expectations for the next few years.

The pandemic represented an extremely challenging period for the whole vinyl retail landscape; however, the market has adapted thanks to its online channels. With the increased demand and interest for vinyl, more independent record shops are opening in big cities to capitalise on the growth.

The report also includes insights on the drivers and wider trends within the music & vinyl market as well as provides an update on the state of the music & vinyl retail landscape.

Key things to know about this report:

Global Vinyl Market Update

Vinyl Shipments Growth Forecast Per Country

Vinyl Supply Challenges

Data Segmentation

- I Buyer Demographic Profile
- I Vinyl Market Forecast
- I Vinyl Supply Outlook
- I Vinyl Retail Developments

Key Questions

- I What are the key trends driving the Vinyl market?
- I What are the Vinyl shipments growth forecasts per country?
- I What are the Vinyl Supply Challenges

GAMING AUDIO & ACCESSORIES MARKET

Amidst Futuresource's extensive consumer technology and media entertainment research, our suite of gaming reports provide a comprehensive, contextualised exploration of all aspects of the ever-growing industry. As the number of gamers continues to grow worldwide, the challenge faced by industry stakeholders is how to establish and maintain a footprint within this lucrative industry.

This report provides an outlook for the world-wide gaming audio (headsets & speakers) and accessories market, breaking out the value, volume, price segmentation and brand analysis. In addition, the report will look at the trends that present opportunities for the existing market leaders and the long list of potential newcomers who see gaming as an opportunity to broaden their position in the audio market.

Key features of the report:

- An updated outlook on the gaming audio and accessories market size.
- Sales, shipment volumes and installed base.
- Five-year forecasts.
- Gaming headset form-factor market split.
- Gaming headset market share.

Data Segmentation

- | **Products:** Gaming headsets, speakers, keyboards, mice, and other accessories (simulation and gamepads).
- | **Segmentation:** Gaming headsets by form factor, wireless, TWS, surround and spatial sound, detachable mic, ANC, vendor, price
- | **Territory:** Worldwide, regional and country-level data for all metrics
- **Regions** - North America, Latin America, Western Europe, Eastern Europe, META, APAC
- **Countries** - USA, Canada, France, Germany, Italy, Spain, UK, Russia, Japan, China, South Korea.
- | **Key Metrics:** Retail value, trade value, market volume
- | **Five-year Forecasts** across all data points

Key Questions

- | What is the global size of the gaming audio market?
- | What is the global size of gaming accessories?
- | How does seasonality impact purchasing?
- | What are the leading features and brands?
- | What are the latest accessories in demand for gamers?

VIDEO GAMES INSIGHTS: GLOBAL MARKET OUTLOOK

With an ever-growing demand for gaming content and an increasing gamer user base, the opportunity for gaming-related services and products continues to develop at a rapid pace. Through continuous research across the Gaming, IT, Consumer Electronics, Video and Music industries, Futuresource holds an unrivalled expertise to assess the major shifts expected to occur across the gaming sector.

This report and the accompanying spreadsheets provide an overview of the current performance, sizing and trends within the video games hardware and software market. Market data and forecasts are provided globally over a five-year period.

Futuresource Consulting's 'Video Games Insights' report will provide clarity on the expected direction of the sector, exploring key opportunities emerging across the gaming software and hardware landscape.

Key features of the report:

- Global gaming software overview- by platform
- Gaming hardware data, notably consoles and handhelds.
- Subscription gaming.
- Trends in PC and mobile gaming.

Data Segmentation

- | **Products: Gaming Hardware-** PS4, PS5, Xbox One, Xbox Series X, Nintendo Switch,
- | **Products: Gaming Software-**Physical & Digital Software, DLC, Arcade Games, Subscriptions
- | **Platforms:** Console, PC, Handheld, Mobile
- | **Territory:** Worldwide, Regional (Country Level Data for some Metrics)
- | **Key Metrics:** Retail Value, Market Volume, Installed Base, Household Penetration
- | **Five-year Forecasts across all Data Points**
- | **Qualitative Analyst Insight Supports all the Data**

Key Questions

- | What are the top trends in gaming hardware, and how does it vary by region?
- | How will gaming's share of the entertainment wallet develop over the next five years?
- | How is monetisation of games content evolving?

SUBSCRIPTION & CLOUD GAMING MARKET REPORT

This global cloud gaming market report evaluates the scale and future growth potential of this lucrative and expanding sector of the video gaming industry.

This report explores the wide range of cloud gaming subscriptions and services, the competitive landscape, and the key drivers and inhibitors which continue to shape the development of the market.

This cloud gaming market report provides a strategic framework for any enterprise with interests in the sector.

Key features of the report:

The current performance, sizing and trends within the subscription and cloud gaming market.

Service differentiation and roadmap.

Subscription and cloud gaming market growth.

Subscription and cloud gaming market shares.

Data Segmentation

- | **Products:** GamePass, PlayStation Plus, Switch Online, Stadia (up to 2022), Amazon Luna, GeForce Now, Shadow PC, Boosteroid, Ubisoft Plus and EA Play
- | **Platforms:** Console, PC and Handheld
- | **Territory:** Global
- | **Key Metrics:** Retail Value, Market Volume (Subscribers), Installed Base, Market Share
- | **Five-year Forecasts across all Data Points**
- | **Qualitative Analyst Insight Supports all the Data**

Key Questions

- | What platforms are supporting the growth of the sector?
- | How is the content strategy evolving across platforms?
- | How are pricing structures evolving?
- | What are the enablers and inhibitors of the industry?
- | How are publisher relations impacting platforms' content strategy?

XR HARDWARE MARKET OUTLOOK REPORT

Gain valuable insights into the XR market with the XR tracking service, extensively researched by Futuresource Consulting. Receive detailed information on the growth of the XR market, significant hardware trends, and a comprehensive market outlook for VR, MR, and AR.

This report acts as a strategic framework for any enterprise operating within the XR hardware market or any adjacent sectors. This publication is produced to provide businesses with a fully rounded view of the market.

Any business with interests in the XR market will benefit from this report, particularly: manufacturers and their suppliers, intermediaries and supply chain, retailers, CE market strategists, investors, and marketing and sales professionals.

Key features of the report:

Market Sizing – quantify and track worldwide VR Head Mounted Displays sales.

Market Forecasting – five-year sales forecasts, reviewing key product types.

Product, Technology & Competitive Review – interpret key market developments and trends.

Data Segmentation

- | XR market outlook – by device type: PSVR, PCVR, AIO, AR Glasses
- | Brand landscape
- | Price developments
- | Regional outlook: USA, Europe - UK, Germany, France, APAC – Japan, China, Rest of World

Key Questions

- | How is VR and AR hardware performing?
- | What are the key use cases?
- | How is this likely to change, and why?
- | How will the industry and technology evolve?

AUTOMOTIVE AUDIO MARKET REPORT

Cars are becoming more intelligent and connected, opening up a wide range of new use cases and business models.

This trend towards an increasingly connected car, combined with development in audio technology are combining to provide significant opportunities for advanced in-car solutions.

Futuresource undertook a program of primary research, interviewing a wide range of providers from: audio hardware, audio software, aftermarket audio resellers, car resellers, semi-conductor providers, car OEMs and tier1s

In addition, desk research was used where appropriate to support. Car sales data is collected from a combination of industry associations and vendor information.

Key things to know about this report:

Market sizing – quantifying the market opportunity for audio hardware in car.

Market trends – analysing key trends impacting the automotive industry, connected car and audio sector.

Competitive landscape – review of key players and their market share.

Data Segmentation

- | Worldwide Passenger Car market Overview
- | Regional Market Forecasts
- | Global EV Uptake Outlook
- | Market Shares by Level of Automation
- | Car Manufacturer's Passenger and Premium Car Market Share
- | Overview of Key Players
- | Technology Outlook

Key Questions

- | What are the key trends in the Automotive Audio market?
- | What are the key Automotive and Connected Car trends?
- | What are the areas of innovation in Car Audio?



Market Trackers

futuresource
CONSULTING

AUDIO BRAND LEADERBOARD REPORT

The personal and home audio markets are evolving at pace, fuelled by breakthrough tech and shifting consumer demands.

To stay ahead, industry players need access to strategic brand intelligence. And that's exactly what our Audio Brand Leaderboard delivers.

Supplementing our quarterly tracker and market report services, this bi-annual report is your go-to resource for information on more than 200 headphone and home audio brands.

Benchmark your performance, track brand momentum and seize new opportunities across the key categories of headphones, true wireless, hi-fi systems, soundbars, wireless speakers and A/V receiver markets.

Stay informed. Stay competitive. Get the insights that matter.

Key features of the report:

Comprehensive brand coverage, market size, global retail value and shipment volumes.

Based on original primary research conducted by a team of audio market specialists at Futuresource Consulting.

This report is designed to complement the quarterly Analyzer cubes, providing a deeper understanding of brand performance within the global audio market.

Data Segmentation

- | **Headphones product coverage:** 64 brands - overall and TWS market
- | **Home audio product coverage:** 47 brands - hi-fi systems, soundbars, wireless speakers and A/V receiver markets
- | **Key metrics:** Brand information- Volume and value
- | **Geographic Coverage:** Worldwide
- | **Deliverable:** This is an excel deliverable, issued bi-annually in March and September

Key Questions

- | Which brands are gaining market share, and which are losing ground?
- | Which product categories and features are fuelling brand momentum, and for which brands?
- | How does your brand stack up against competitors across key audio segments?
- | Where are the biggest opportunities for growth in the global audio market?

HEADPHONES MARKET TRACKER

This headphones quarterly tracker report forms part of Futuresource Consulting's regular global headphone market research program. It provides an update on the global headphone market size, headphone market growth, and market share of headphones companies each quarter.

This report provides a strategic framework for any enterprise with an interest in the earphones and headphones market. For those subscribers with Analyzer, it's also accompanied by the Futuresource Analyzer Cube, along with a detailed spreadsheet which breaks out six regions and 11 countries. For annual subscribers, there's also a dashboard deliverable.

Benefits of this service include worldwide data segmented by every major region and country and 100% coverage of market units, representing all brands, SKUs and channels.

Key features of the report:

Market sizing, global retail value, shipment volumes and installed base of aftermarket headphones.

Five-year market forecasting focusing on key form factors.

Detailed analysis, broken down into six regions and 19 countries with more granular data on feature breakouts, price segmentation, brand shares and distribution trends.

Data Segmentation

- | **Products:** True wireless (TWS), In-ear excl. TWS, on-ear headphones, over-ear headphones, Open-ear
- | **Features:** Wi-Fi/Bluetooth, wireless, microphone, ANC, sport, hi-res, voice assistant, IPX rating, battery life, price groupings, brand
- | **Geographic Coverage:**
 - **Regions** - North America, Latin America, Western Europe, Eastern Europe, META, APAC
 - **Countries** - USA, Canada, France, Germany, Nordics, UK, Netherlands, Switzerland, Russia, Japan, China, India.

Key Questions

- | What is the market size for headphones and where are the growth opportunities?
- | Which features are seeing greatest adoption?
- | What are the brand shares and who are the brand leaders?

HOME AUDIO MARKET TRACKER

The home audio quarterly tracker report is a regular output of Futuresource Consulting's home audio equipment market research program. This report provides an update on the global home audio market size and home audio market share for each quarter. For those subscribers with Analyzer, it's also accompanied by the Futuresource Analyzer Cube, along with a detailed spreadsheet which breaks out six regions and 12 countries. For annual subscribers there's also a dashboard deliverable.

Futuresource provide quarterly, granular market tracking detail for the Home Audio market categories, complementing its widely supported and trusted market sizing, forecasting, insights and consulting services. The benefits of this service include worldwide data segmented by every major region and country and 100% coverage of market units, representing all brands, SKU's and channels.

Key features of the report:

Market sizing, retail value, shipment volumes and market share of wireless speakers, soundbars and Hi-Fi systems.

Quarter-on-quarter market tracking.

Detailed analysis, broken down into six regions and 11 countries with extremely granular data on feature breakouts, price segmentation and brand shares.

Data Segmentation

- | **Products:** Hi-Fi systems, wireless speakers, soundbars,
- | **Features:** Wi-Fi, bluetooth, wireless, smart, microphone, price bands, brand, multiroom audio, wireless speaker type, smart speaker platform, Google Cast, HDMI, screen, DTS:X, Dolby Atmos
- | **Geographic Coverage:** USA, Canada, France, Germany, UK, Nordics, Netherlands, Switzerland, Russia, India, Japan, China & six regions

Key Questions

- | What are the key feature sets for home audio products?
- | How do new product launches impact vendors' quarterly performance?
- | Which price groups, brands and specifications are most popular?
- | Which brands and features are performing well in which price segments?
- | Which countries and regions are performing strongest currently?

VIRTUAL ASSISTANTS MARKET TRACKER

With over 30 years' experience, our unparalleled knowledge and expertise across consumer electronics, media delivery systems, technologies and content platforms uniquely enables us to deliver stimulating insights and tactical analysis of the virtual assistant (VA) supply-chain.

This virtual assistant market tracker report provides updates on market forecasts and changes that have occurred within the voice technology landscape. Market analysis for virtual assistants segments the worldwide adoption of voice interfaces by region, assistant platform, product and brand.

Whether companies are designing voice-enabled products or harnessing the new generation of virtual assistants to expand market reach with their customers, this tracker provides detailed historical and forecast analysis alongside strategic and insightful commentary that both informs and educates.

Key features of the report:

- Market development of voice interfaces.
- Underlying technologies for virtual assistants.
- Virtual assistant ecosystems.
- Examination of voice across Consumer Electronics.

Data Segmentation

- | **Segmentation:** Device type, brand, VA platform, region & level of voice assistant integration
- | Volume, installed base & brand shares across categories
- | **Worldwide Penetration**
- | **Average Retail Prices**
- | **Geographic Coverage:** Americas, EMEA, APAC
- | **Ecosystem Development:** Amazon Alexa, Microsoft Cortana, Google Assistant, Apple Siri, Samsung Bixby, Baidu Dueros, Alibaba Aligenie & Yandex Alice
- | **Five-year Forecasts** across all data points

Key Questions

- | What are the volumes & the installed base for voice assistants?
- | Which VA assistant is leading in each category?



Consumer Surveys



AUDIO TECH LIFESTYLES CONSUMER SURVEY

Utilising our unique methodology and wider expertise in the audio and entertainment industry, our Audio Tech Lifestyles Consumer Survey provides a deeper insight into the wants, needs, behaviour, and profile of the audio consumer.

This report unveils key consumer trends to better understand the opportunity for future product and service positioning moving forward. A review of the changing competitive landscape is also assessed, focusing on the perception of tech giants in comparison to more traditional audio brands.

The usage of smart speakers, headphones and notably true wireless forms a core part of the study. The role and expectations for audio quality amongst consumers is explored in depth, along with their audio consumption habits.

Key features of the report:

Online survey with a sample size of 2,000 per country, across five countries.

Usage and attitudes towards a range of home audio devices and services explored.

Audio device ownership and intent to purchase reviewed.

Data Segmentation

- | **Products:** Wireless speakers, smart speakers, hi-fi systems, soundbars, party speakers, audio components & headphones
- | **Geographic Coverage:** USA, UK, Germany, Japan & China
- | **Interview Length:** 20 minutes

Key Questions

- | Which pieces of audio hardware do consumers own?
- | What is their device uptake by brand and how do they use it?
- | What are consumers' main listening preferences?

KIDS TECH CONSUMER SURVEY

As children are starting to learn and engage in activities on devices such as computers, tablets and smartphones from an increasingly younger age, more traditional toys are starting to explore the explosion of digital platforms, combining online and mobile experiences.

These developments are clearly creating new business opportunities for hardware vendors, content and toy companies, advertisers and kids brands alike, whilst at the same time presenting social and regulatory concerns with regards to too much access to such technology. Children's physical well-being and social development, as well as exposure to too much advertising and inappropriate content, are much debated issues.

Our Kids Tech consumer survey is a twice yearly, syndicated online consumer survey, exploring such topics in detail and providing insights into the digital lifestyles of children aged 3-16.

This report covers seven markets; Brazil, China, France, Germany, Mexico, UK, and USA. A large sample of respondents are recruited in each country in the survey with appropriate quotas set against both the age and gender of children.

Data Segmentation

- | **Kids & Gaming:** Video games, Esports/Twitch
- | **Kids & Video:** TV/Video viewing trends, SVoD uptake, Pay-tv Lite uptake, content length and genres
- | **Kids & Their Time:** General activities, multitasking
- | **Kids & Devices:** Device usage, voice assistants
- | **Kids & Audio:** Music and audio, apps
- | **Kids & New Media:** Social media, brand and influencers

Key Questions

- | What are the SVoD services kids are engaging most with and how does time spent on these compare to free online platforms?
- | Where are kids focusing their time and attention, across traditional and digital activities?
- | To what extent are parents controlling digital hobbies of their kids?
- | How are kids engaging with voice platforms in the home?

AUDIO TECH LIFESTYLE- PATH TO PURCHASE

This headphone market trends report is based on primary research carried out as part of Futuresource Consulting's extensive consumer research program. This wave of research carried out across China, France, Germany, the UK and the USA, focuses on providing insight into the retail journey of consumers buying headphones.

Respondents were asked about the headphones they purchased, information about that product, where they purchased it (which retailer and whether online/offline), price point and their product purchase journey.

Key things to know about this report:

Respondents had to have purchased one of the types of headphones to qualify for the survey. Some respondents had purchased more than one type.

This sample of purchases is used to assess retailer share of market as well as brand positioning within leading retailers.

The sample was nationally representative.

Any significance tests were done at the 95% confidence interval.

Data Segmentation

- I Sample Demographic: Country, Gender, Age, Income
- I Headphone type: Sleep Headphones, Active Noise Cancelling Headphones, Kids Headphones,

Key Questions

- I What is the purchase journey for Headphones?
- I What is the percentage of consumers who saw a product demonstration prior to purchase?
- I Who are the top physical retailers by country?
- I Which brands were considered and purchased from the most?

LIVING WITH DIGITAL CONSUMER SURVEY

Futuresource is proud to introduce yet another wave of Living With Digital. This twice-yearly consumer research report investigates the shifts in consumers' entertainment content consumption, looking at service usage, device ownership, and interaction.

This service aims to provide an up-to-date view on attitudes towards PVoD, Cinema, EST, TVoD, SVoD market, AVoD market, NFTs and wider entertainment consumption habits.

Each wave presents a benchmark set of questions to gauge the evolution of consumer's trends and habits. This wave focuses on video and television trends with an increased emphasis on entertainment early release movies and windows and SVoD service behaviour and future intent.

Key things to know about this report:

Client feedback helps shape the overall questionnaire to ensure maximum relevance.

Regular, trending questions are combined with new questions in each wave to address hot topics and key themes in the industry.

We provide an ongoing monitoring of uptake and behaviour relating to streaming video services.

Data Segmentation

- | **Topic Segmentation:** Demographics & Hardware/Devices, Purchase/Rental & Subscription/TV
- | **Data Segmentation: Key Consumer Demographic** Detail, Profiles of Netflix Subscribers, Disney+ Subscribers, HBO Max Intenders, Samsung Smart TV Owners & EST Buyers

Key Questions

- | How are consumer viewing habits evolving as cost-of-living takes hold?
- | How are different viewing types and services complementing each other?
- | Which consumer groups are driving changing viewing habits?

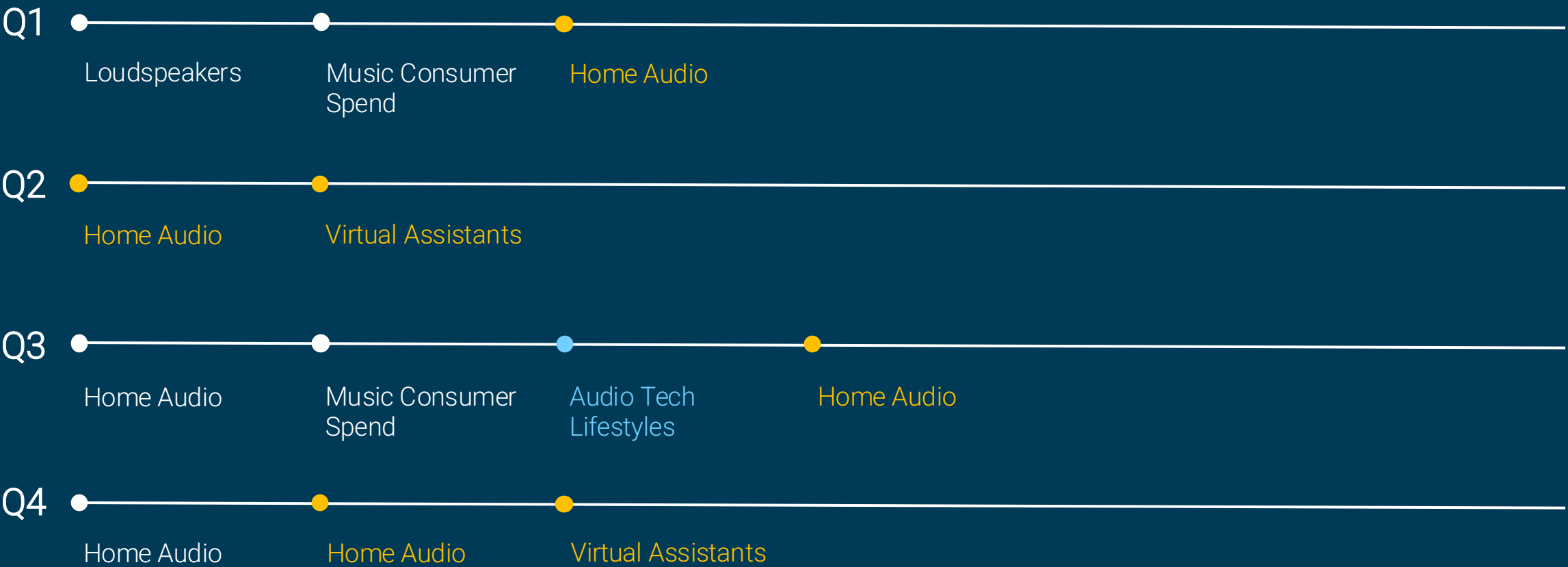


Product & Services

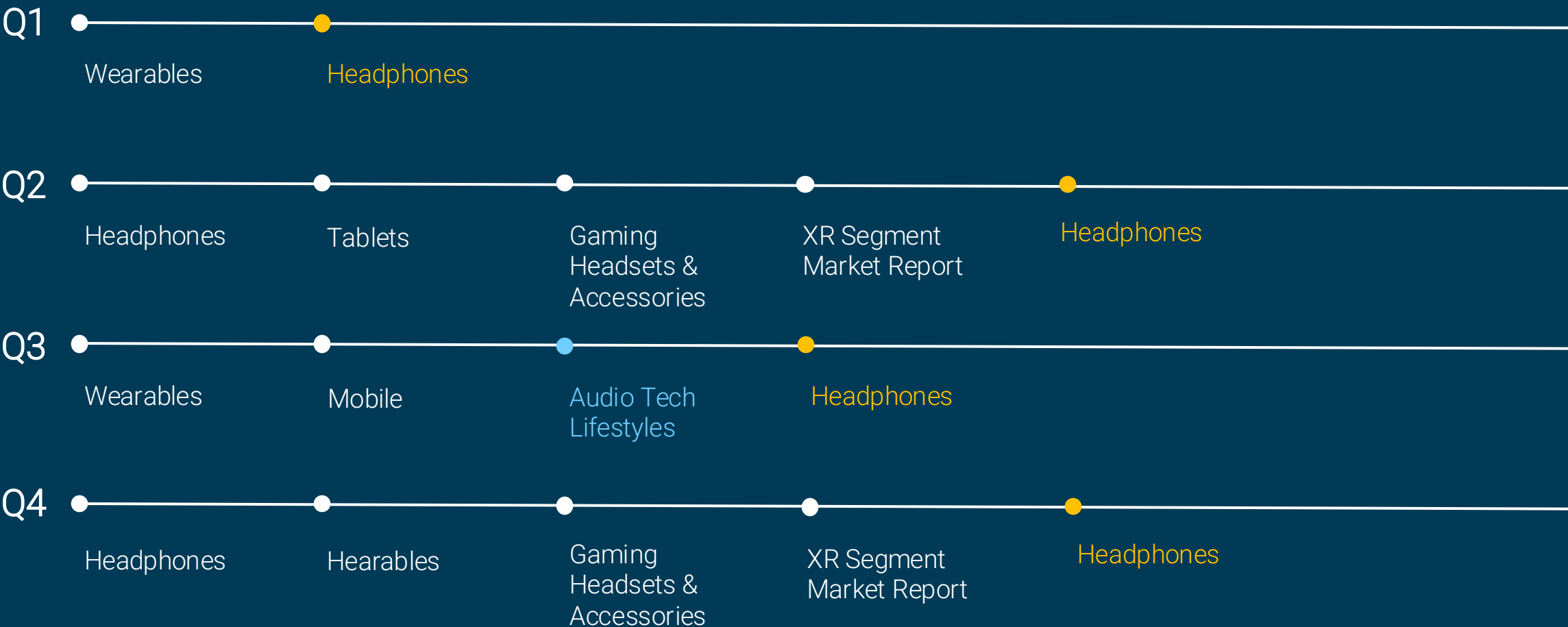
futuresource
CONSULTING



HOME AUDIO | PUBLICATION SNAPSHOT



PERSONAL AUDIO | PUBLICATION SNAPSHOT



SERVICE OVERVIEW

OVERVIEW

- | Successfully navigate the evolving consumer audio & entertainment landscape with our detailed analysis, forecasting and reporting spanning hardware, services and content.
- | For more than 30 years, Futuresource has advised clients on all aspects of the sector, becoming the world's leading provider of strategic market information and consulting services to the consumer entertainment & audio industry.
- | As consumption reaches an ever-broader population, with feature commoditisation, price pressure and global competition intensifying, we can provide you with the meaningful market insights you need.

AT A GLANCE

- | Unique insights - primary research backed commentary & value-add information including competitive landscaping
- | Commercial and technology assessment across hardware, components and services.
- | Regional and country-level reporting and analysis of market size by volume and value
- | 5-year industry forecasts with adoption metrics and growth prospects

KEY DELIVERABLES

Comprehensive PDF report with commentary, insights, data sets and charts

Granular excel data sheets with market metrics

Access to key data and themes in Power BI

Open-ended analyst access & regular onsite/online debriefs

OUR METHODOLOGIES

Futuresource carry out a number of mixed methodology programmes with a heavy focus on quantitative data, in order to provide a trusted, 360-degree view of each industry. From bespoke custom projects through to multi-client subscription services, our expert market analysts work side-by-side with the quantitative research team to deliver actionable insights, underpinned by a range of stringent methodologies.

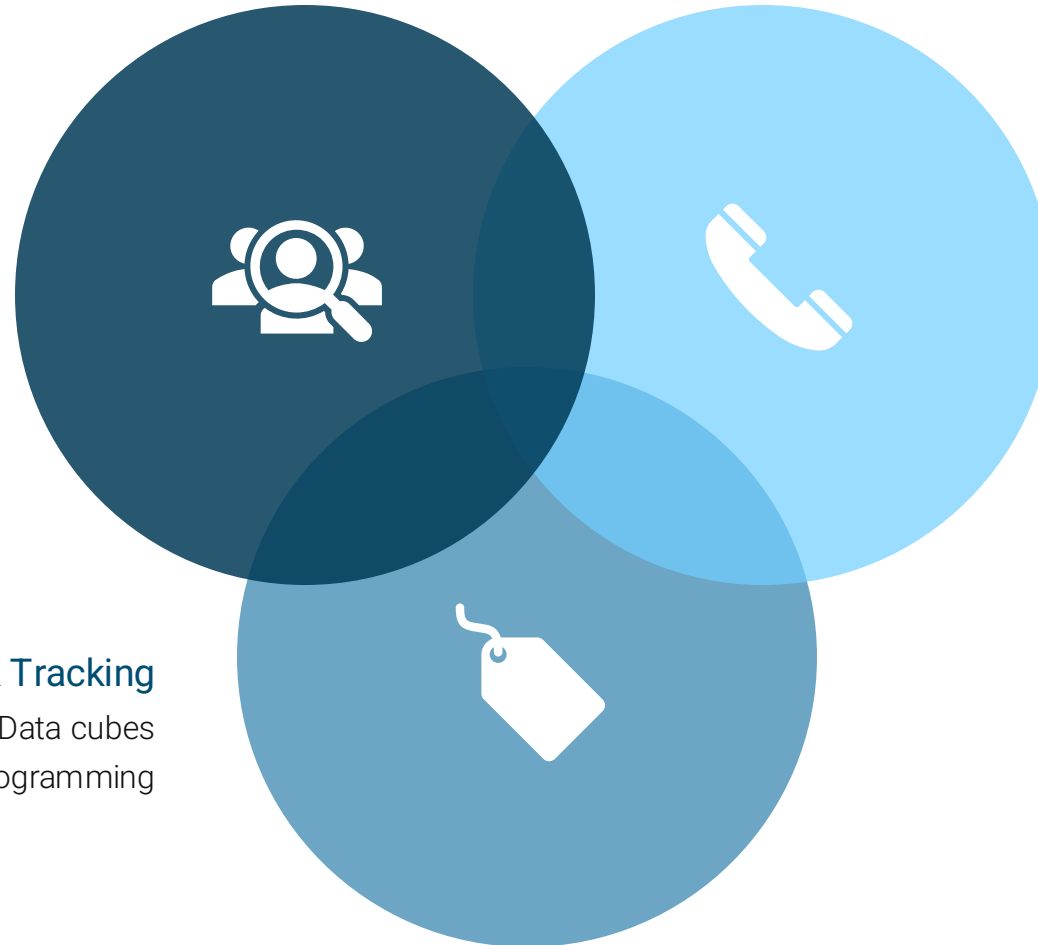
Consumer Research

Quant / qual data:

- Online surveys
- Telephone surveys
- Focus groups
- Diary Studies

Price / Stock Tracking

- Data cubes
- Data programming



Industry Research

Primary & secondary research:

- Expert interviews
- Direct data feeds from vendors
- Trade associations
- Government statistics

END USER REPORTS

Living with Digital

Kids Tech

Audio Tech Lifestyles

Smart Home

Shopper Journey

Enterprise AV Decision Maker

NEW Hybrid Work End-User

Content Creator

Higher Education Survey

Bring-Your-Own-Device

Esports

Ed Tech Voice Programs

*AV Devices, Computing Devices, Administrative
Software, Classroom & Assessment Tools*

OUR USP'S IN CONSUMER RESEARCH



With over 30 years in the market research space, Futuresource Consulting's diverse team of expert analysts offer a deep understanding of international & local nuances.



We combine rich industry perspectives with consumer research to deliver a holistic view of the sectors we cover - aligning our market expertise with quant & qual methodology



We have extensive experience of custom research on behalf of leading global players across all key sectors, including consumer electronics, entertainment, education technology & the professional AV industry.



Our reputable international panel providers across online & mobile have been extensively verified and profiled to ensure the highest level of provision and reliability.



Outside of our syndicated end user reports, we offer a flexible approach to delivering the level of insights best suited to your business needs.

Can't find the market insights you're after? Work with us to build a bespoke research project tailored to your specific needs.

Our custom projects provide meaningful and actionable insights, through a blend of the methodological expertise of our quantitative research team, the industry expertise of our analysts, and our existing industry data.

[CONTACT US](#)

An Introduction to our AV Database:

Our consolidated AV database is the go-to resource for extensive metrics across the audio visual space, covering displays, audio, capture & production, collaboration, infrastructure & more.

Key benefits:

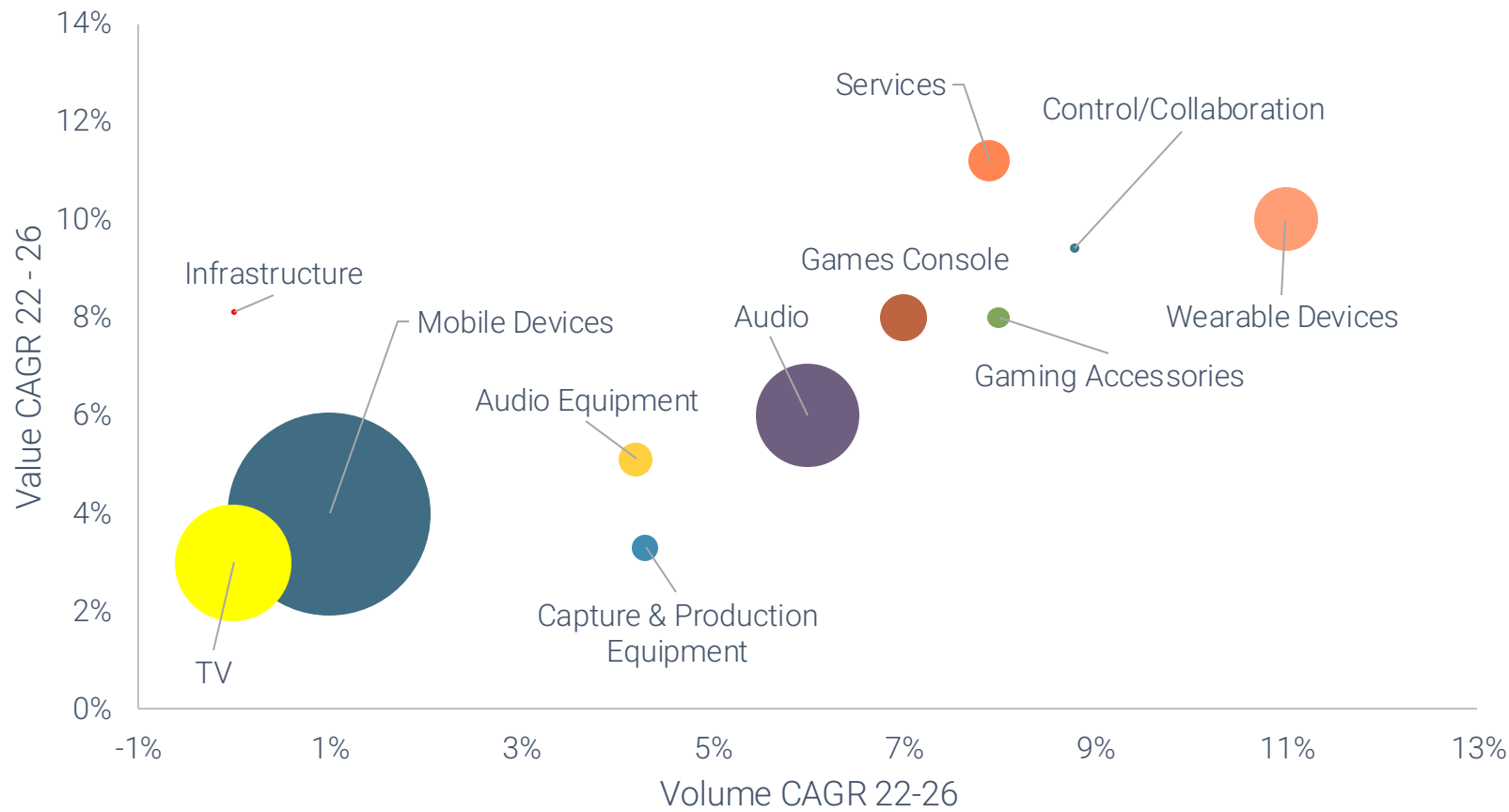
Gain a holistic understanding of the market size, growth rates, and global brand share across multiple product segments to identify opportunities and align strategies effectively.

Conveniently access market data in Futuresource's user-friendly Online Analyzer platform, saving time and reducing costs for efficient analysis.

Leverage your market understanding, growth potential, and competitive advantage to attract investors and stakeholders and drive business expansion.

[Find out more](#)

Global AV Industry – 2022 Category Value (\$) and Growth Expectations



Futuresource Consulting is a market research consulting company that provides a range of specialist intelligence reports and ongoing personal debriefs to support with business decision-making. We pride ourselves on delivering fact-based insights and market forecasts on a global scale – advising on strategic positioning, identifying key trends, analysing competitors, and underpinning major technological developments.

A close-up shot of a black and silver speaker on a wooden surface.

Audio

A man in a suit presenting to a group of people in a modern office setting.

Collaboration

A close-up of a person's wrist wearing a smartwatch.

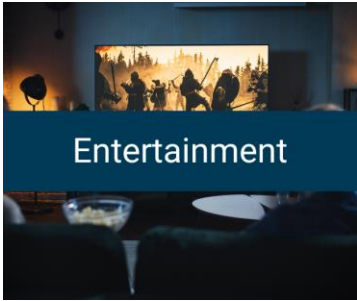
Consumer Electronics

A close-up of a colorful, pixelated display screen.

Displays

A young girl sitting at a desk, looking at a laptop screen.

Education

A person sitting in a dark room, watching a large screen displaying a movie scene.

Entertainment

A close-up of a person's hand holding a camera, with a blurred background.

Media Technology

A close-up of a circuit board with various electronic components.

Storage Media

[ENQUIRE HERE](#)

OUR EXPERTISE

- | Full service end-to-end research capabilities
- | Global market coverage based on informed local expertise
- | Delivering excellence for over 30 years
- | Leading-edge data delivery and analysis
- | Unrivalled client list, maintained through client-centred service approach

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Company Registration No: 2293034

ABOUT FUTURESOURCE EMPOWERING BRANDS FOR OVER 35 YEARS

For over 35 years, global technology and media powerhouses have trusted Futuresource to deliver unrivalled data, consumer insights, and industry expertise, creating perspectives that drive business acceleration.

STRENGTHENING POSITION, PROFIT, PROPOSITION AND REPUTATION

We provide the data, analysis, end-user insights, and narrative that inform actionable insights, enabling our clients to lead the charge on market share, diversification, innovation, and customer experience.

INDUSTRIES

- | | |
|----------------------|------------------|
| Audio | Education |
| Collaboration | Entertainment |
| Consumer Electronics | Media Technology |
| Displays | Storage Media |

TALK TO US

Interested in learning more about how Futuresource can help your business, how you can work for us or collaborate? Get in touch!

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