

True wireless earbuds are driving innovation and creating a growth market

Smartphones are driving the market for true wireless stereo earbuds, according to the latest industry report, which provides valuable market opportunities for technology vendors.

Total market revenues for the true wireless stereo earbuds (TWS) market are expected to reach almost \$10 billion in 2019, outstripping all other headphone markets, according to the latest research.

According to the latest report from SAR Insight & Consulting – FOCUS, True Wireless Earbuds: Market Growth, Market Shares, Technologies Used, Components Used – more than 40 million TWS earbuds with a retail value of more than \$6 billion were shipped in 2018, and rapid growth is expected to continue.

The market is expected to grow rapidly over the next five years accounting for more than 60% of all wireless stereo headphones shipped by 2023.

The biggest driver of this growth will be TWS's role as a companion product to smartphones, and the increasing trend of including voice-activated assistants.

"Apple has led the market since introducing the AirPods in 2016, which dominate market shipments today," Peter Cooney, Principal Analyst & Director at SAR Insight & Consulting, said. "Smartphone OEMs lead the market and accounted for an estimated 90% of volumes in 2018.

"These vendors are expected to continue to dominate, supplying TWS as companion devices to their smartphones. Total market revenues are expected to reach almost \$10 billion in 2019, and smartphone vendors are expected to account for the vast majority of this."

The use of voice control increased dramatically when the Apple AirPods was introduced with Siri in 2016. Since then, several other devices have added Amazon Alexa and Google Assistant. Many device OEMs will add multiple digital assistant platforms in order to have the widest availability of devices to connect to.

"Today, digital assistants are activated by physical means, eg, a press of a button or a tap," Peter said. "SAR expects that there will be rapid increase in the use of always-on voice trigger from 2019 onwards as battery density improves and new, more energy efficient, solutions such as smart microphones are implemented.

"SAR expects that Wi-Fi and cellular technologies will start to be used in TWS, primarily to enable a direct connection to the cloud. However, there are still major issues such as efficiency and radiation that need to be overcome for these technologies to be implemented."

The TWS report from SAR Insight also looks at how the technology used in headphones provides additional opportunities for technology vendors.

##ENDS##

For further information, please contact:

Peter Cooney, Principal Analyst & Director, [SAR Insight & Consulting](#)

peter@sensianresearch.com, +44 1392 580 960

Note to editors: [SAR Insight & Consulting](#) provides detailed quantitative and qualitative research on established and emerging technology markets across multiple end applications. www.sarinsight.com