

Wireless Headphones Market Report

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● Introduction

First created in 1910, headphones and earphones have become an inseparable part of modern life. This pair of small speakers worn over or inside the user's ears enables us to listen to music or sounds, take phone calls, and even connect to gaming systems.

The current selection of headphones is so wide and abundant, from old school wired headphones to tiny wireless in-ear earphones. The major shift from wired to bluetooth connecting headphones happened during 2014, when the wireless segment of headphones market has almost doubled. With each passing year the demand and expectations for high quality, wireless headphones has been growing steadily, making it a daily life staple for millions around the globe.

As demand grew more and more over the years, so has the headphone industry. pushing revenues higher and becoming more sophisticated to match buyer's demands, the US headphones market has reached an impressive 1.2 billion dollars in 2019, with over 14.5 billion dollars world wide.

The US headphones market has reached
1.2B\$ in 2019

! *These numbers make the wireless headphones market worth watching.*



Revuze has been providing leading global companies with valuable consumer insight analytics. Our highly granular market research enables our clients to better understand their customers, assess their competition, and spot new trends. This time we will take a look at the massive wireless headphones, would you like to join us?



● What are the consumers saying?

Revuze developed the first self-training, low touch AI technology that collects and analyzes customer feedback automatically and serves valuable insights.

Our software collected over 1.2 million consumer reviews from several different online sources in a three year period, between 2017 and 2019. Our AI identified over 3 million valuable quotes, covering more than a hundred brands and over 1,000 different products.

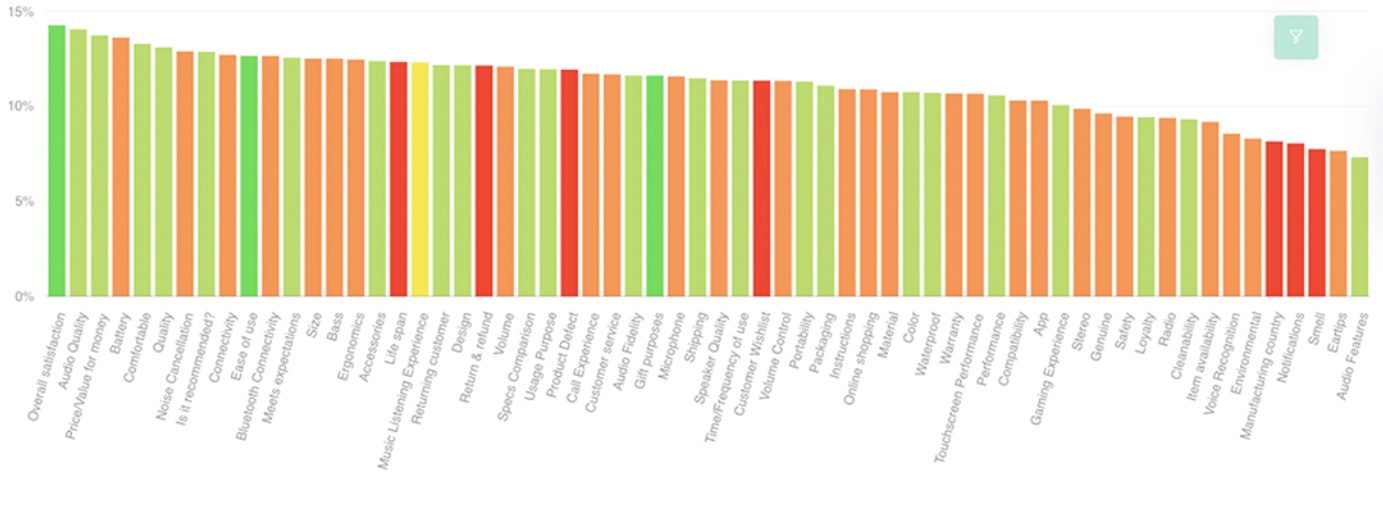


Revuze’s AI organized the data into 50+ discussion topics and identified value sentences. It then analyzes the sentiment in each sentence (positive, neutral, negative). The % of positive sentences is calculated into the average sentiment, providing a more clear and simple consumer experience and sentiment analysis.



The overall sentiment of the wireless headphones market is 75%. In other words, 75% of the quotes analyzed contain a positive sentiment (meaning that 25% are neutral or negative). The average star rating in this market is 4.11 stars out of 5.





After analyzing all the available customer feedback data, we identified over 50 different trending topics regarding the wireless headphones market. As represented in the topic column chart below, the topics with an above average sentiment are green, and the ones below the average sentiment are orange or red.

The top 10 topics by importance/volume in this market are:

- 01 Overall Satisfaction
- 02 Audio Quality
- 03 Price/Value for money
- 04 Battery
- 05 Comfortable
- 06 Quality
- 07 Noise Cancellation
- 08 Is it recommended?
- 09 Connectivity
- 10 Ease of use

Looking at the list, some topics regard customer experience while other topics surround customers expectations towards the product/service. Other topics are more specific to the headphones or electronics industry, such as battery, audio quality and connectivity.

Now let's dive into some of these topics. We picked some of the trending topics we found to be interesting and can provide insights into customers' needs, wants and experience with wireless headphones or the audio and electronics industry as a whole. We decided to focus on current topics that provide a deeper understanding of consumer interests, experiences, desires and needs.

Battery

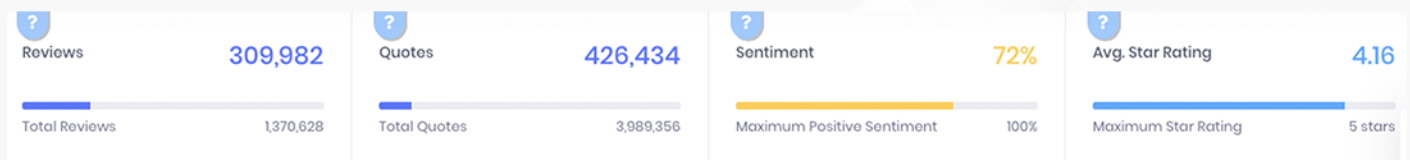
Wireless headphones have many great advantages, but perhaps the greatest of them is their convenience of use. What do we mean by that? Well, simply put, wireless headphones increase the users' freedom and mobility and are a lot more convenient than old school wired headphones.

The Bluetooth technology allows users to be up to 33 feet away from their device without the signal being degraded. This means there is a lot more freedom to move around without carrying or picking up the device every single time. The absence of cords also releases users from worrying about getting tangled up with furniture or clothing.

The wireless Bluetooth connection also means these headphones run on battery. Hence, users

need to charge them, just like their smartphones, tablets or laptops. Most wireless Bluetooth headphones have built-in rechargeable batteries. The longevity of each full charge depends on the device and can vary greatly from about two or three hours up to a couple of days.

So, unsurprisingly, battery is one of the top ten trending topics for the wireless headphones market. Number four to be precise.



With over 300 thousand reviews and 400 thousand valuable quotes detected, it seems consumers are very engaged about battery performance of their wireless headphones.

Good battery life can make or break a brand. Just take a look at what disappointment this customer articulates, after the brand they bought stopped charging properly -

“

They also had a terrific battery life. Then, nearly six months later with average use, they've decided to quit holding a charge whatsoever. I'd charge them overnight, use them for an hour, make sure they were powered down, and the next time I'd go use them they were dead.

12/31/2019

The instability of the product has not only caused customer dissatisfaction, but it also hindered the formation and maintenance of consumer loyalty. Creating and fostering **Brand Loyalty** is how businesses make customers come back once and again to their brand. This kind of emotional relationship fostered with consumers leads to repeat purchases, higher revenues, and positive word-of-mouth.

With 72% positive sentiment, the topic of battery isn't always referred to in negative context. However, even the 28% voicing dissatisfaction can spread negative word-of-mouth that hurts brand loyalty and hinders repeat purchases. The topic of battery life might not seem very surprising when discussing wireless headphones or electronics in general. However, we did find an interesting sub topic hidden in customer reviews - **battery life tracking or display**.

It might seem trivial, but having a simple, easy to read battery level display can make a lot of difference. In many customer reviews regarding battery consumers mentioned battery levels tracking -

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"I absolutely love the number readout for battery level, and the individual charge level of each earbud.

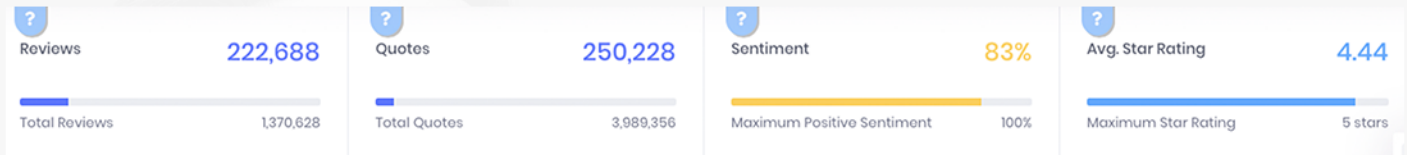
12/31/2019

Since they have to charge them, consumers want to track headphone's battery levels easily, be it on-device display or level percentages shown on the connected device. It might seem inconsequential, but it turned out to be a major feature that can greatly improve customer experience and sentiment.

● Comfort

Another major trending topic we detected was comfort.

At first glance it might seem a bit strange to consider the comfort of a pair of headphones. Most people will look for the best sound quality and value for money when comparing headphones before purchase. However, when analyzing customer feedback we detected comfort to be a major trending topic.



With over 250 thousand valuable quotes for the three year review period, the issue of headphone comfort is worth a further look.

Especially, if you take into account the detrimental effect discomfort has on customer experience and overall sentiment -



Excellent noise cancellation and sound quality, but wished the ear foam was slightly thicker. My ear gets uncomfortable after a few hours.

12/31/2019

Having a well designed pair of headphones can make all the difference. So, let's talk about the main design aspect affecting levels of user comfort - the shape.

The shape of the headphones is not only the aesthetic form of the product, but also its physical shape - on-ear, over-ear, earphones, and so on. Sure, the decision of which type of headphones consumers will go for is very much dependent on the intended use, like office work, exercise, or gaming. However, there are some key shape aspects to look for when designing or your product.

First thing first, it is vital to remember that no human face is the same. We differ in shape, size, and contours. So, a pair of headphones that works for one person might not be comfortable for another.

Just like this customer described -



The are super comfortable too, I have complicated ears meaning that most earphones don't fit, they fall off constantly etc..."

12/30/2019

So, when you approach product assessment and think what changes or innovations should be made, try to keep design flexibility and customization in mind. If consumers are able to modify your product to their personal needs they will feel heard and appreciated, increasing customer sentiment and loyalty.

Second, there are several headphone features that can greatly improve user's comfort -



Extension - This feature is found in on-ear headphones. Ear cups that can't reach down far enough end up pressing ears against the head. This constant pressure leads to soreness and discomfort. Over-ear cups should be designed to have a full, comfortable seal around the ears – achievable by making sure the cups' extension can be adjusted by the user.



Rotation - Ear cup rotation is a key feature allowing the headphones to conform to the natural contours of users' faces, as well as maintaining even pressure on the ears. headphones with both lateral and vertical ear cup rotation are likely to be the most comfortable.

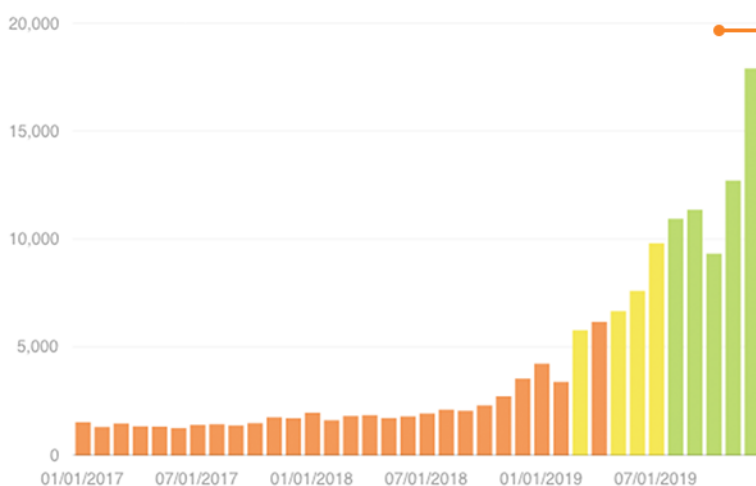


Cushioning - the quantity and quality of cushioning on the ear cups and the headband can make a world of a difference. Thin cushions don't prevent the users' ears from touching the hardware, making it extremely uncomfortable as well as diminishing sound quality. The type of cushioning material can also make a significant difference, so choose wisely.

Taking into consideration all these features and having customers' comfort in mind can elevate future brand innovation efforts. Putting the consumers first will not only improve sales, but will also drive brand growth forward.

● Noise cancellation

Noise cancelling headphones are the latest trend in the wireless headphones industry. Looking at the noise cancellation topic volume chart below, the increase of quotes during the past two years is evident.



Noise-cancelling headphones, first introduced to the open market in the 1990's, reduce or block out unwanted ambient sounds. A microphone inside the earpiece produces an anti-noise signal that's equal but opposite to the noise, effectively cancelling it. This feature allows users to get lost in the music or conversation, blocking all outside distractions.

People are drawn to the noise-cancelling headphones trend for many reasons, like travel comfort or enhanced concentration. But sometimes they just look for some peace and quiet -

“

Helps drown out background noise at the gym and to focus on audio and workout.

12/31/2019

“

They are noise cancelling which helps me because I work in a loud warehouse.

12/31/2019

“

I love that I can just cancel out the extra noises, like the dishwasher or my children.

12/31/2019

However, it seems top headphone brands have not been paying attention. Comparing four major brands - TaoTronics, Sony, Bose, and Sennheiser - it looks as if none of them have been keeping up with the demand for noise cancellation.

| | Industry | TaoTronics | Sony | Bose | Sennheiser Consumer Audio |
|--------------------|---------------|-------------|-------------|-------------|---------------------------|
| Noise Cancellation | 149,439 70% ♥ | 9,783 68% ♥ | 7,706 65% ♥ | 6,310 65% ♥ | 2,644 61% ♥ |

For example, let's take a closer look at Sony. With only 65% positive sentiment, it seems consumers are not very pleased with the noise cancelling features of Sony headphones. All brands have a lower sentiment rate than the industry percentage of 70%. These numbers are problematic considering how major the trend has become over 2019.

True, noise-cancelling is a supplementary feature for wireless headphones, but is one of those technologies that is impossible to go back from after you've tried it once. And consumers know what they want.

The bottom line is that wireless noise-cancelling headphones are the future. So, it might be worthwhile to pay attention and implement in your next product development and marketing strategy design.



● Conclusion

The wireless headphones industry has shown steady growth in recent years, raking in over 1.2 billion dollars in revenue in the US alone during 2019.

The leading topics discussed by wireless headphones consumers are overall satisfaction, audio quality, and value for money. These topics can't come as a surprise to brands and consumers alike. It is no wonder that audio is a major concern for headphones consumers. However, we decided to take a deeper look into a less obvious topic, but one that has been introduced by the shift to wireless headphones - battery.

The issue of headphone battery life was identified in over 300 thousand reviews, pointing to consumers being very vocal and concerned with battery performance. Since wireless headphones depend on batteries to function, it is vital to monitor and detect if consumers are reporting any issues or dissatisfaction in the matter as soon as possible.

Another major topic discussed was comfort. Headphones have become a daily staple, used for work, study and travel. Making sure headphones are adjustable and comfortable is vital, and listening to customers' needs and wants means the improvements are onpoint and more likely to make actual difference.

And, last but not least, we identified a rising interest in one of the latest industry trends - Noise cancellation. This feature has become more and more sought after by consumers. Wireless noise-cancelling headphones are the future, so it is vital to closely monitor the topic.

All topics and issues discussed highlight customers' experiences, needs and wants from the last three years. Moving forward into 2020, it might be worthwhile to pay close attention and monitor the market closely. Gaining a better understanding of your customers will help you stay ahead of the game - so, stay tuned for our 2020 Wireless headphones market report.

