



Global and China Speech Recognition Industry Report, 2015-2020

Apr. 2016

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Propelled by big data, mobile Internet, cloud computing, and other technologies, global intelligent voice industry has entered the stage of rapid application. Global intelligent voice market size was USD4.75 billion in 2014 and is predicted to grow 30.7% from a year ago to hit USD6.21 billion in 2015.

With intense involvement of Internet giants including Google, Microsoft, and Apple around 2010, global intelligent voice industry has gradually evolved from oligopoly to monopolistic competition. In 2015, speech recognition leader Nuance still took the first place with a market share of 31.1% but suffered a significant decline; Google, Microsoft, Apple, and IFLYTEK witnessed rapid share growth, standing at 20.7%, 13.4%, 12.9%, and 6.7%, respectively.

Thanks to national policy support and demand growth from downstream sectors, China's intelligent voice industry also flourishes with an ever-expanding market size. In 2015, the Chinese intelligent voice market scale was estimated at RMB4.68 billion, a year-on-year surge of 53.1%, making up around 12% of the global market.

Traditional Chinese speech recognition companies mostly take a place in intelligent voice market by relying on domestic scientific research institutions, while new firms largely accelerate their presence in intelligent voice industry via financing. The majority of the Chinese intelligent voice market is held by iFLYTEK, Baidu, and Apple (a combined 79% share in 2015). To gain an advantage in market competition, Chinese speech recognition players have flooded into market segments such as intelligent in-vehicle, smart home, and wearable devices.

In intelligent in-vehicle field, speech recognition giants Nuance, Apple, Google, Microsoft, iFLYTEK, and Baidu have launched Dragon Drive in-vehicle speech development platform, CarPlay, AndroidAuto, Windows in the Car, Auto Speech System, and CarLife, respectively, and cooperated with carmakers to grab emerging intelligent in-vehicle market.

As the application of speech recognition technology in intelligent in-vehicle, smart home, and wearable devices goes deeper, global and Chinese intelligent voice market will maintain the momentum of rapid growth, reaching estimated USD19.17 billion and RMB25.14 billion in 2020, respectively.

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Intelligent In-vehicle Products and Customers of Major Global Voice Recognition Companies

Company	Main Products	Major Customers	Advantage
Nuance	Dragon Drive In-vehicle Speech Development Platform	Mercedes-Benz, Toyota, Lexus, BMW, Audi, Ford	The world's largest voice tech company, ranking first in terms of the number of voice technology patents and global market share, with a large number of clients
Apple	CarPlay	Audi, Ford, Chevrolet, Honda, Volkswagen, SKODA, Citroën, DS Automobiles	Obvious superiority in promoting iPhone-based in-vehicle speech recognition system thanks to higher market share of iPhone and users' awareness of voice assistant Siri globally
Google	AndroidAuto	Audi, Hyundai, Honda	Accumulation of big data and relevant technologies lays a strong foundation for speech recognition technology; Google map services provide advantages for developing in-vehicle speech recognition system.
Microsoft	Windows in the Car	--	Nearly 20-year research history in speech recognition field; many Windows-based in-vehicle systems; years of rich experience in the field.
IFLYTEK	Auto Speech System	BMW, Mercedes-Benz, Volkswagen, Toyota, Geely, Lexus, Mazda	Domestic leader; higher rate of Chinese language recognition
Baidu	CarLife	Hyundai, BYD	A Chinese Internet giant; accumulation of big data and relevant technologies lays firm foundation for the development of voice technology; Baidu map provides advantages for its presence in intelligent in-vehicle.
SinoVoice	Voice Recognition Products	Hyundai, BYD, Changan	The company, with HCICloud Platform as main architecture, builds stereoscopic eco-oriented HCICloud product system. It is the country's first provider of all-round AIT (Artificial Intelligence Technologies) including Text To Speech (TTS), Automatic Speech Recognition (ASR), HWR (Handwriting Recognition), Optical Character Recognition (OCR), and Natural Language Understanding (NLU).

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Global and China Speech Recognition Industry Report, 2015-2020 highlights the followings:

- Global intelligent voice industry (development history, status quo, business model, competitive landscape);
- China's intelligent voice industry (current development, relevant policies, competitive landscape);
- Market segments of speech recognition technology (development of intelligent in-vehicle, smartphone, PC, smart home, and wearable devices, and voice recognition companies' layout in these segments);
- 7 foreign and 10 Chinese speech recognition technology-related companies (voice recognition business and application in automotive field).

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