

# Wireless Speaker Survey Findings

Executive presentation for consumer audio leadership team



# Recommendation

Go if Price  $\leq \$199$

This is a **hard threshold**, not a flexible guideline

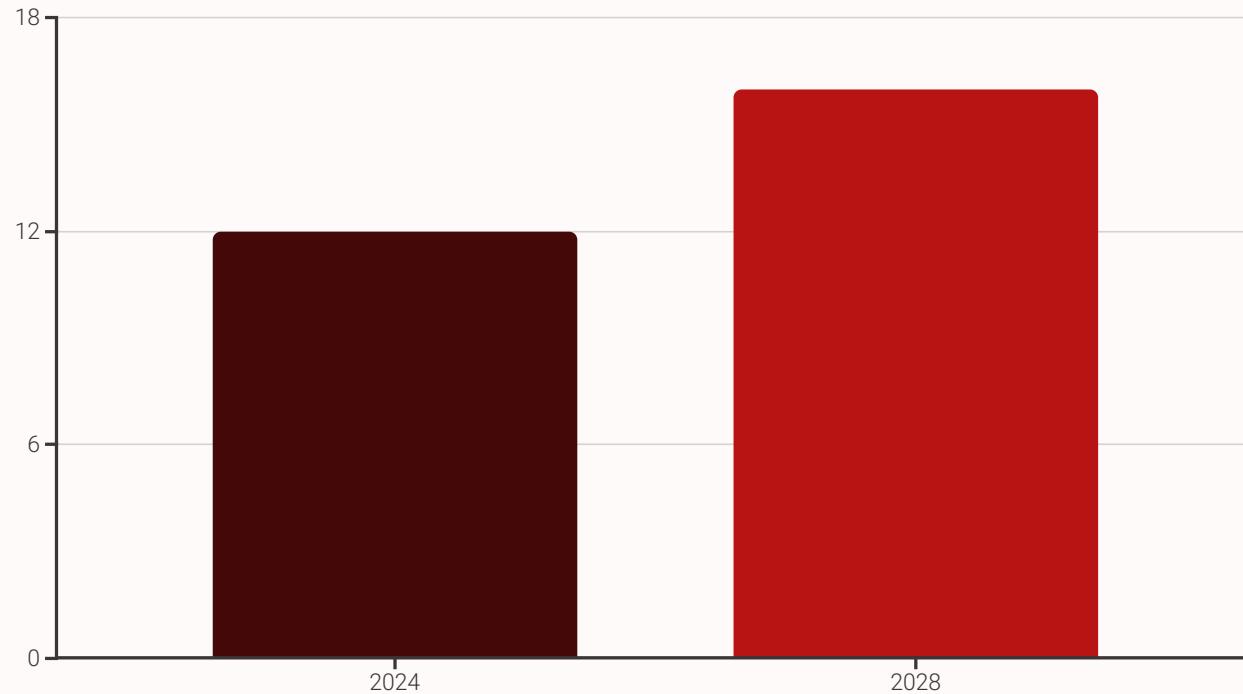
Go if Battery  $\geq 15$  hrs

This is a **hard threshold**, not a flexible guideline

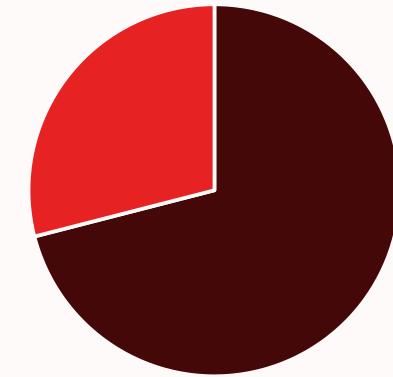
Why these thresholds? They align perfectly with consumer willingness-to-pay and feature drivers identified in our survey.

**Beats' edge** = Optimal balance of value perception and brand strength in this highly competitive market.

# Market Opportunity Snapshot



Wireless speaker market growing at **5-7% CAGR** through 2028



Own      Don't Own

✖ **Purchase intent is muted:** 65% of respondents rated their likelihood to purchase  $\leq 3/5$

# Survey Methodology

4,906

Total Responses

Analysis filtered to 3,490 current  
wireless speaker owners

86%

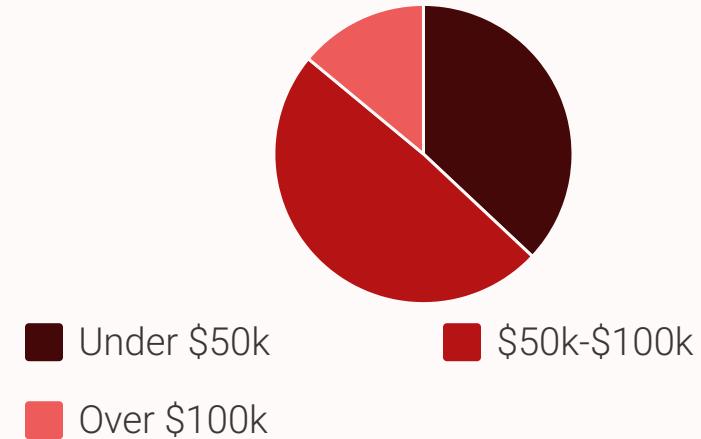
Under 34

68% aged 18-24, 18% aged 25-34

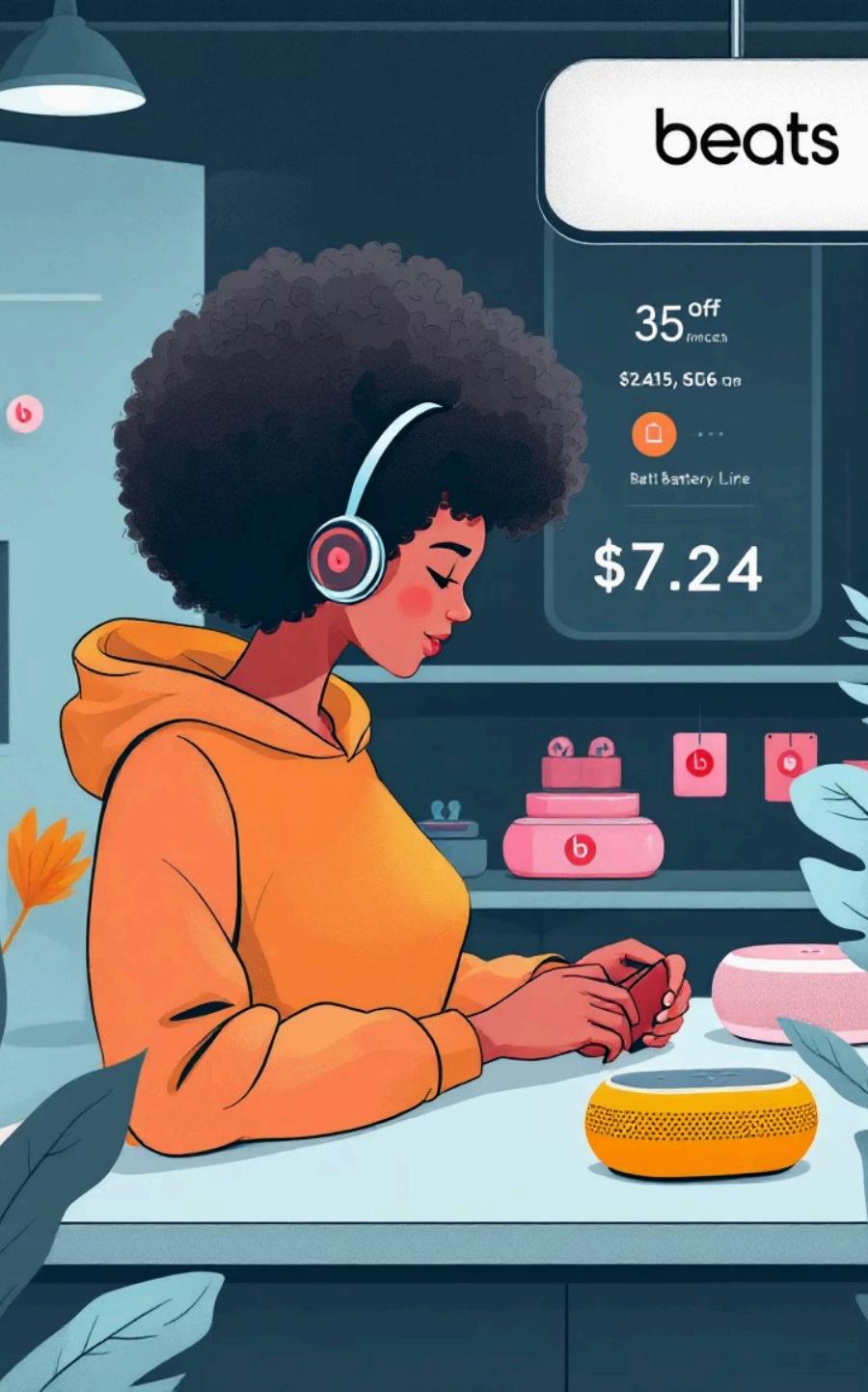
52%

Female

Gender split: 52% female, 46%  
male, 2% non-binary/PNTS



**Important note:** Insights are  
directional only; sample is not  
nationally representative



# Consumer Priorities



## Price

#1 decision factor for consumers, directly affecting purchase intent

## Battery Life

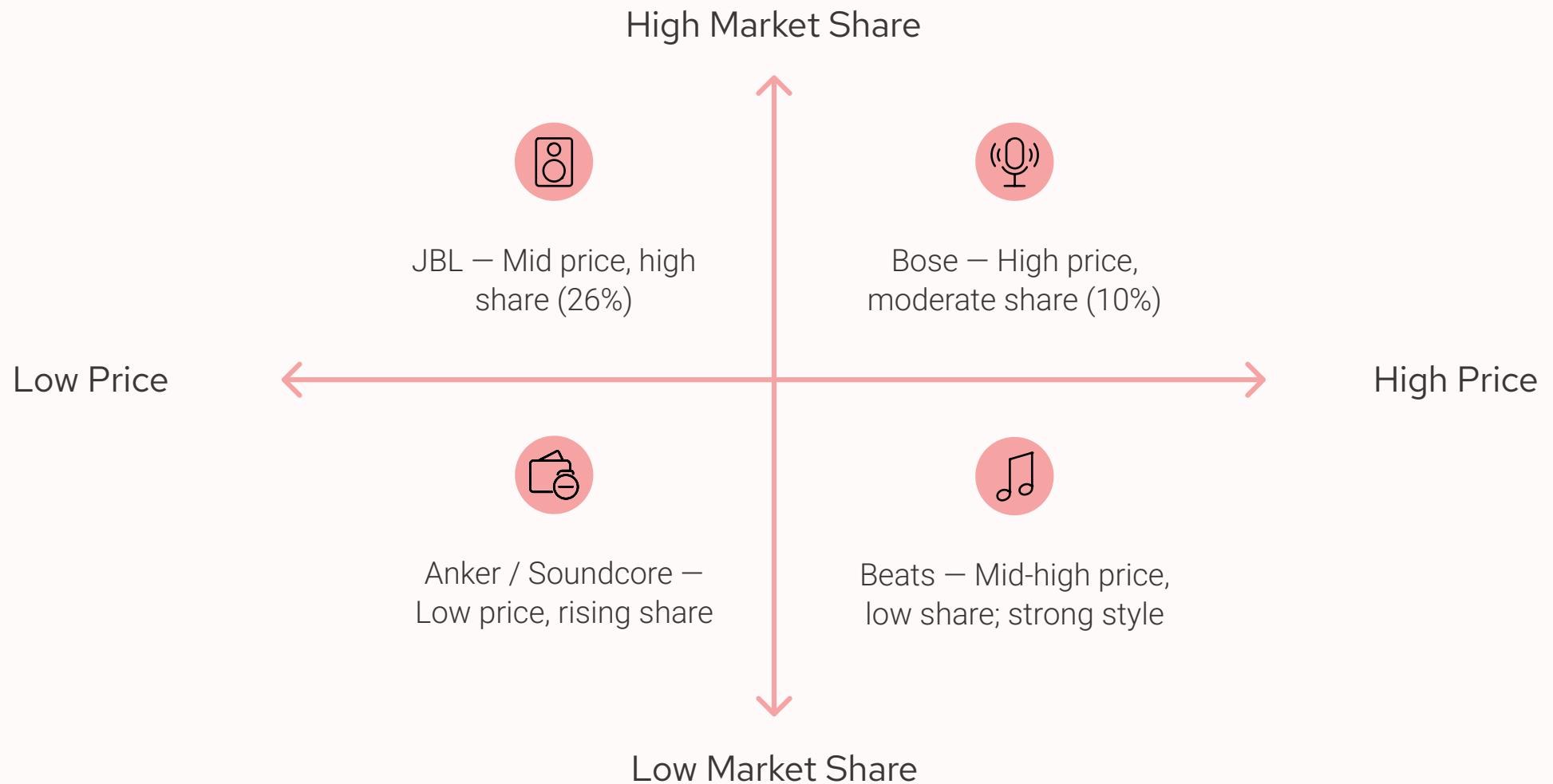
Second most important feature, especially for portable use cases

## Connectivity

Must seamlessly work with multiple devices and ecosystems

**Critical insight:** Sound quality is now a table stake, not a differentiator. Design and durability scored lower in survey but remain historic Beats strengths we can leverage.

# Competitive Landscape



## JBL (\$99-149)

Dominates volume via retail distribution

## Bose (\$149-299)

Premium tier with high margins

## Anker (\$59-99)

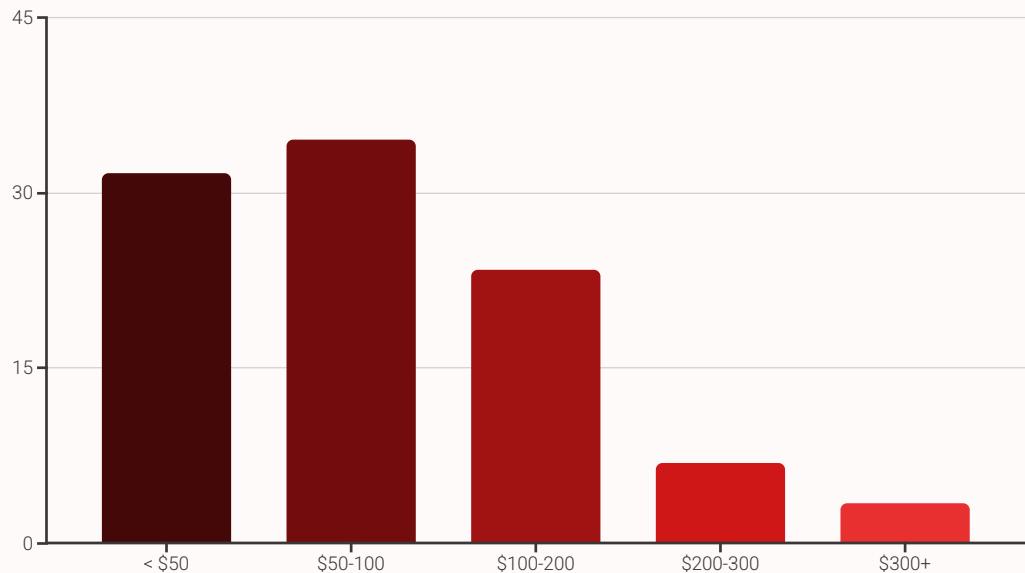
Amazon-first, fast-growing budget player

## Beats (Current)

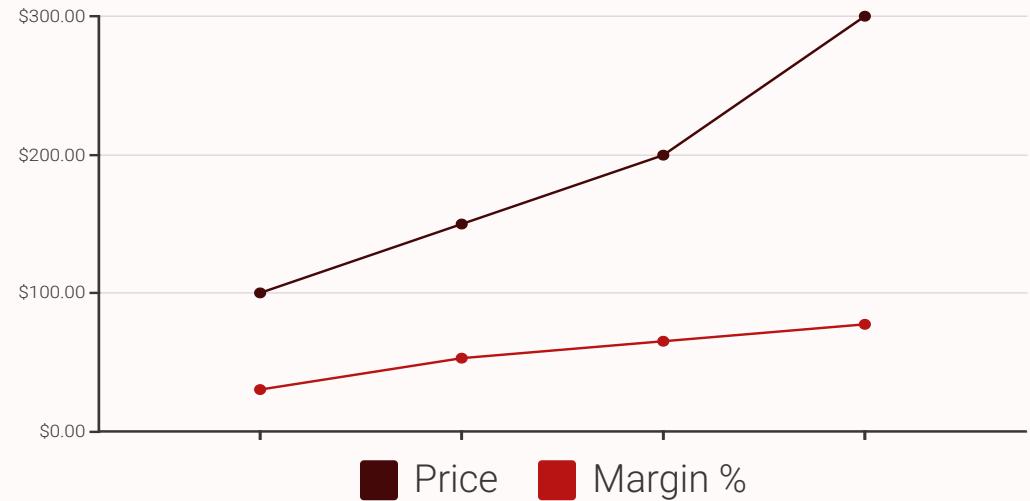
Strong style/sound equity, weaker price perception

# Financial Model & Viability

Willingness to Pay Distribution



Gross Margin (COGS = \$70)



✓ **Sweet spot:** \$129-179 price range balances volume potential (covers ~60% of buyers) with healthy margins (50%+)

Breakeven analysis: At \$150 price point, we need 66k units to reach \$10M revenue target

# Risks, Mitigations & Next Steps

## Key Risks

**Cannibalization** of headphone sales

**Competitor price cuts** to defend market share

**Market saturation** limiting growth potential

## Mitigations

**Complementary positioning** to headphone lineup

**Apple ecosystem tie-in** for added value

**Youth focus** leveraging our survey demographics

## Next Steps

Expand survey with nationally  
representative panel

Build detailed cost/margin model  
with Operations

Validate positioning in \$129-179  
price range