Global and China Speech Recognition Industry Report, 2015-2020

Description: 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.

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).

Contents:

1 Speech Recognition Technology
   1.1 Definition and Classification
   1.2 Technical Principle
   1.3 Industry Chain

2 Global Intelligent Voice Industry
   2.1 Development History
   2.2 Status Quo
   2.3 Business Model
   2.4 Competitive Landscape

3 Intelligent Voice Industry in China
   3.1 Status Quo of Development
   3.2 Relevant Policies
3.3 Competitive Landscape

4 Market Segments
4.1 Intelligent In-vehicle
4.2 Smartphone
4.3 PC
4.4 Smart Home
4.5 Wearable Devices

5 Major Foreign Speech Recognition Players
5.1 Nuance
5.1.1 Profile
5.1.2 Operation
5.1.3 Revenue Structure
5.1.4 R&D
5.1.5 Speech Recognition Business
5.1.6 Application in Automotive Field
5.2 Apple
5.2.1 Profile
5.2.2 Operation
5.2.3 Revenue Structure
5.2.4 R&D
5.2.5 Speech Recognition Business
5.2.6 Application in Automotive Field
5.3 Google
5.3.1 Profile
5.3.2 Operation
5.3.3 Revenue Structure
5.3.4 R&D
5.3.5 Speech Recognition
5.3.6 Application in Automotive Field
5.4 Microsoft
5.4.1 Profile
5.4.2 Operation
5.4.3 Revenue Structure
5.4.4 R&D
5.4.5 Speech Recognition
5.4.6 Application in Automotive Field
5.5 IBM
5.5.1 Profile
5.5.2 Speech Recognition
5.6 MindMeld
5.7 Speaktoit

6 Major Chinese Voice Recognition Companies
6.1 iFlyTek
6.1.1 Profile
6.1.2 Operation
6.1.3 Revenue Structure
6.1.4 Gross Margin
6.1.5 R&D and Investment
6.1.6 Speech Recognition Business
6.1.7 Application in Automotive Field
6.1.8 Forecast and Outlook
6.2 Baidu
6.2.1 Profile
6.2.2 Operation
6.2.3 Revenue Structure
6.2.4 R&D
6.2.5 Speech Recognition Business
6.2.6 Application in Automotive Field
6.3 AI Speech
6.3.1 Profile
6.3.2 Speech Recognition Business
6.3.3 Application in Automotive Field
6.4 Unisound
6.4.1 Profile
6.4.2 Speech Recognition Business
6.4.3 Application in Automotive Field
6.5 ThinkIT
6.5.1 Profile
6.5.2 Speech Recognition Business
6.5.3 Major Customers
6.6 SinoVoice
6.6.1 Profile
6.6.2 Operation
6.6.3 Revenue Structure
6.6.4 Gross Margin
6.6.5 R&D
6.6.6 Speech Recognition Business
6.6.7 Application in Automotive Field
6.6.8 Forecast and Outlook
6.7 Pattek
6.7.1 Profile
6.7.2 Operation
6.8 Mobvoi (Chumenwenwen)
6.8.1 Profile
6.8.2 Operation
6.9 d-Ear
6.10 Vcyber
6.10.1 Profile
6.10.2 Application in Automotive Field

7 Summary and Forecast
7.1 Overall Market
7.2 Competitive Landscape
7.2.1 Nuance: Declining Market Share; Actively Explores Emerging Markets
7.2.2 Google: A Latecomer Getting Ahead of Others; Its Biggest Advantage Lies in User Flows
7.2.3 Microsoft: Blossoming of Voice Application
7.2.4 SIRI: Higher Users’ Awareness Helped by Apple
7.2.5 IBM: Gradual Fading-out Because of Poor User Experience
7.2.6 iFlyTek: Unshakeable Speech Recognition Leader in China

List of Charts
- Voiceprint Recognition Flowchart
- Intelligent Voice Human-Computer Interaction Industry Chain
- Level of Voice Technology Development
- Development History of Global Intelligent Voice Industry
- Speech Recognition Products of Global Speech Recognition Companies and Their Applications
- Major M&A Cases of Global Speech Recognition Companies
- Business Model of Speech Recognition Industry
- Market Share of Global Intelligent Voice Companies, 2012
- Market Share of Global Intelligent Voice Companies, 2015
- China’s Intelligent Voice Market Size, 2013-2015
- Policies on Chinese Speech Recognition Industry, 2010-2015
- Major Chinese Speech Recognition Companies and Related Research Institutes
- Market Share of Chinese Intelligent Voice Companies, 2012
- Market Share of Chinese Intelligent Voice Companies, 2015
- Financing Cases of Major Chinese Speech Recognition Companies
- Global Automobile Output, 2012-2015
- China’s Passenger Vehicle Output and Sales Volume, 2012-2015
- China's Automobile Ownership, 2012-2015
- Intelligent In-vehicle Products of Major Global Speech Recognition Companies and Their Customers
- Comparison of Mobile Mapping System of Global Speech Recognition Enterprises
- Intelligent In-vehicle Layout of Global Speech Recognition Enterprises
- Global Smartphone Shipments and YoY Growth Rate, 2013-2015
- China's Smartphone Shipments and YoY Growth Rate, 2013-2015
- Comparison of Major Global Voice Assistant Products
- Global PC Shipments and YoY Growth Rate, 2012-2015
- Application of Intelligent Voice Technology in Smart Home
- Wearable Devices of Major Global Speech Recognition Enterprises
- Revenue and Net Income of Nuance, FY2012-FY2015
- Revenue Breakdown of Nuance (By Business), FY2012-FY2015
- Revenue Structure of Nuance (By Business), FY2012-FY2015
- Revenue Breakdown of Nuance (By Region), FY2013-FY2015
- R&D Costs of Nuance, FY2012-FY2015
- Major Partners of Nuance
- Main Functions of Nuance's Dragon Drive Automotive Assistant
- Revenue and Net Income of Apple, FY2013-FY2015
- Revenue Breakdown of Apple (by Region), FY2013-FY2015
- Revenue Structure of Apple (by Region), FY2013-FY2015
- Revenue Breakdown of Apple (by Product), FY2013-FY2015
- Revenue Structure of Apple (by Product), FY2013-FY2015
- Sales Volume of Apple's Main Products, FY2013-FY2015
- R&D Costs of Apple, FY2013-FY2015
- Revenue Breakdown of Google (by Product), 2013-2015
- Revenue Structure of Google (by Product), 2013-2015
- Revenue Breakdown of Google (by Region), 2013-2015
- Revenue Structure of Google (by Region), 2013-2015
- Revenue and Net Income of Microsoft, FY2011-FY2015
- Revenue Breakdown of Microsoft (by Division), FY2013-FY2015
- Revenue Structure of Microsoft (by Division), FY2013-FY2015
- R&D Costs of Microsoft, FY2013-FY2015
- Major Investors of MindMeld
- Business Model of iFLYTEK
- Revenue and Net Income of iFLYTEK, 2012-2015
- Revenue Breakdown of iFLYTEK (by Product), 2012-2015
- Revenue Structure of iFLYTEK (by Product), 2012-2015
- Revenue Breakdown of iFLYTEK (by Region), 2013-2015
- Main Products of iFLYTEK
- Gross Margin of iFLYTEK (by Product), 2013-2015
- R&D Costs of iFLYTEK, 2012-2015
- Non-Public Offering Fundraising Projects of iFLYTEK, 2015
- Function Component Modules and Structure of iInterReco
- Function of Aitalk 3.0
- Function Component Modules and Structure of InterVeri 2.1
- Revenue and Net Income of iFLYTEK, 2015-2020E
- Revenue and Net Income of Baidu, 2012-2015
- Revenue Breakdown of Baidu (by Product), 2012-2015
- Revenue Structure of Baidu (by Product), 2012-2015
- Revenue Breakdown of Baidu (by Region), 2012-2015
- Revenue Structure of Baidu (by Region), 2012-2015
- R&D Costs of Baidu, 2012-2015
- Cooperative Partners of Baidu Speech
- Main Solutions of Unisound
- Major Partners of Unisound
- Intelligent Vehicular Cases of Unisound
- Ownership Structure of ThinkIT
- Performance Indicators of ThinkIT Speech Recognition Engine
- Technical Features of ThinkIT Speech Recognition Engine
- Performance Indicators of ThinkIT Voiceprint Recognition
- Cooperative Partners of ThinkIT
- Development History of SinoVoice
- Revenue Breakdown of SinoVoice (by Product), 2013-2015
- Revenue Structure of SinoVoice (by Product), 2013-2015
- Top 5 Customers of SinoVoice, 2013-2015
- Major Sales Contracts of SinoVoice, 2015
- Major Customers of SinoVoice
- SinoVoice's Speech Recognition Applications in Automotive Field
- Revenue and Net Income of SinoVoice, 2014-2020E
- Financial Indicators of Pattek, 2013-2014
- Development History of Mobvoi
- Ownership Structure of Mobvoi
- Financial Indicators of Mobvoi
- Main Speech Recognition Related Products of d-Ear
- Major Partners of Vcyber
- Cooperation Model of VcyberYujiahuanying
- Global Intelligent Voice Market Size, 2015-2020E
- Chinese Intelligent Voice Market Size, 2015-2020E
- Nuance's Acquisition of Innovation-oriented Enterprise to Enrich Product Line
- Google's Acquisitions in Intelligent Voice Field
- Google Now's Market Share Investigated by TEC Hnalysis Research, 2015

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