



The Open-Ear Era

How Open-Ear Audio Is Reshaping Personal Listening

2026.

Category Definitions

Open-ear



Clip-on earbuds (Abbreviated as ear-clip)
 (Open-ear headphones that clip onto the outer ear without blocking the ear canal.)



Bone conduction headphones (Abbreviated as bone-conduction)
 (Open-ear headphones that transmit sound through vibrations via the skull without blocking the ear canal)



Open earbuds with ear hook (Abbreviated as ear-hook)
 (Open-ear headphones that are secured with ear hooks and do not block the ear canal)

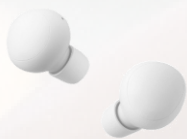
In-ear



In-ear earbuds with stem
 (Stem-style earphones that are inserted into the ear canal to create a sealed fit)



Semi in-ear earbuds with stem
 (Stem-style earphones that are inserted into the ear canal to create a sealed fit)



In-ear buds (bean-shaped)
 (Compact in-ear earbuds without stems that are worn by inserting into the ear canal)



In-ear earbuds with ear hook
 (In-ear earphones that use ear hooks for added stability while being inserted into the ear canal)

Over-ear



Over-ear/On-ear headphones
 (Headphones worn over the head, with earcups that cover or rest on the ears)

Foreword

As an indispensable technological product in modern life, headphones have undergone a major shift from being driven by functional technology to being driven by consumer demand.

Open-ear headphones have revolutionized the industry's development logic through their user-centric design—making them a quintessential of an era in which consumer demand shapes category growth.

As industry professionals, we present this report to deeply analyze the logic behind this explosive growth, assess the sustainability of current trends, and explore the future direction of product development and evolution.

A woman with dark hair in a ponytail, wearing a white long-sleeved shirt and a light-colored cardigan, is shown in profile from the chest up. She is smiling and looking out of a large window with a wooden frame. She is holding a brown paper coffee cup with a white lid in her right hand. The background outside the window is a blurred view of trees and foliage. A semi-transparent white rectangular box is overlaid on the image, containing the text '01' and the title 'Background & Trends for development'.

01

Background & Trends for development

The headphone industry is transitioning from growth driven by technological breakthroughs to growth driven by user needs

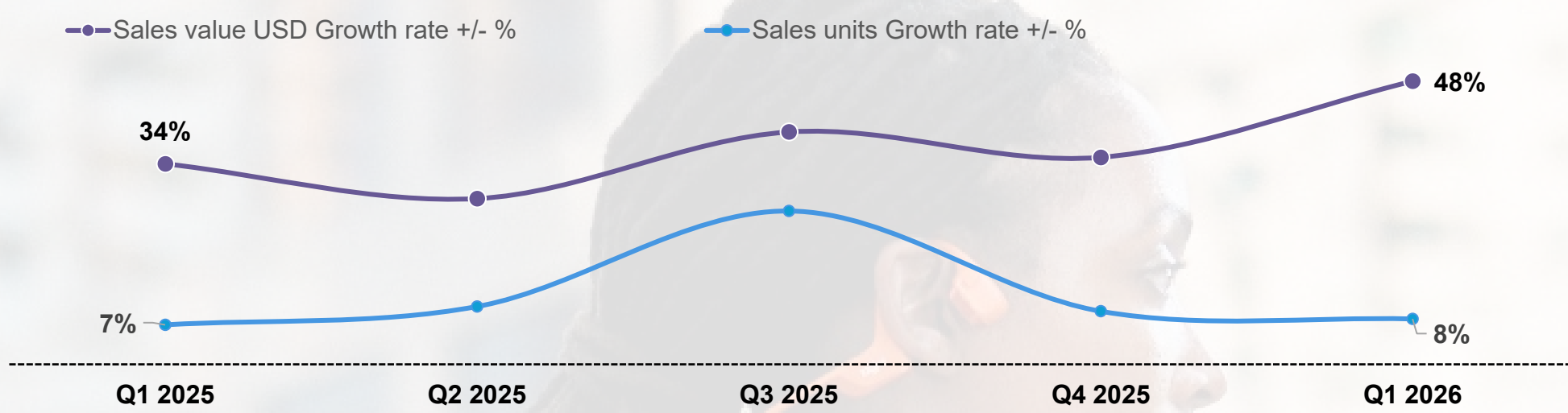
- The rise of open ear is redefining the consumer experience.



Growth of the Open Ear headphone type is broad, across tracked markets now surpassing total \$1bn YTD

- Particularly strong triple-digit growth in emerging regions

Global (ex. North America, Russia) | Open-Ear Headphones



Global (ex. North America) | Open-Ear Headphones
Jan 26 – May 26 growth +/- % by region

TOTAL \$1.11 billion USD (+45%)



The rise of Open ear is driven by trends in at least the following three areas

1

Economic Aspect:

Moderate recovery led by higher-income households

2

Social Aspect:

The rise of Gen Z's purchasing power
The fitness and wellness trend driven by the pandemic.

3

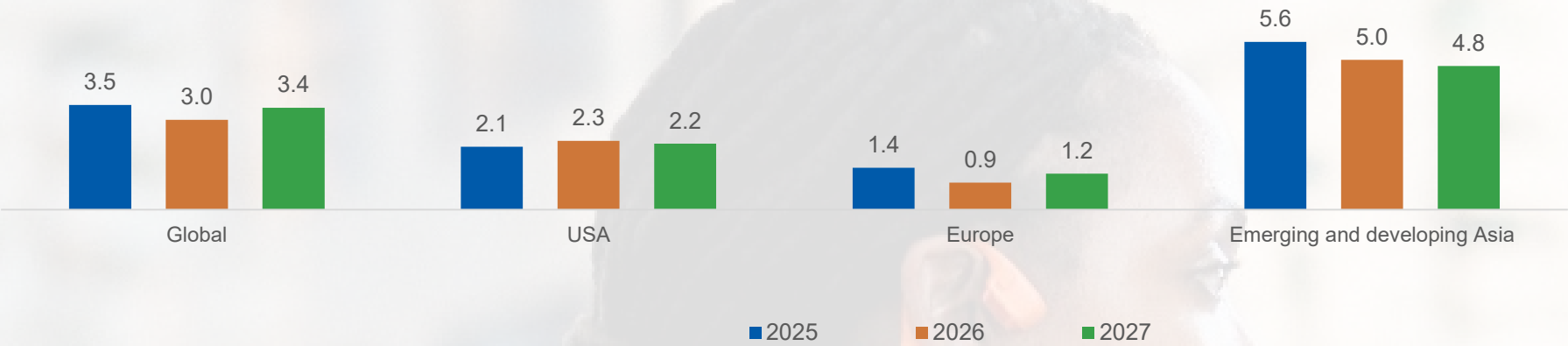
Technological Aspect:

Technological advancements in open-ear are benefiting the headphone industry.

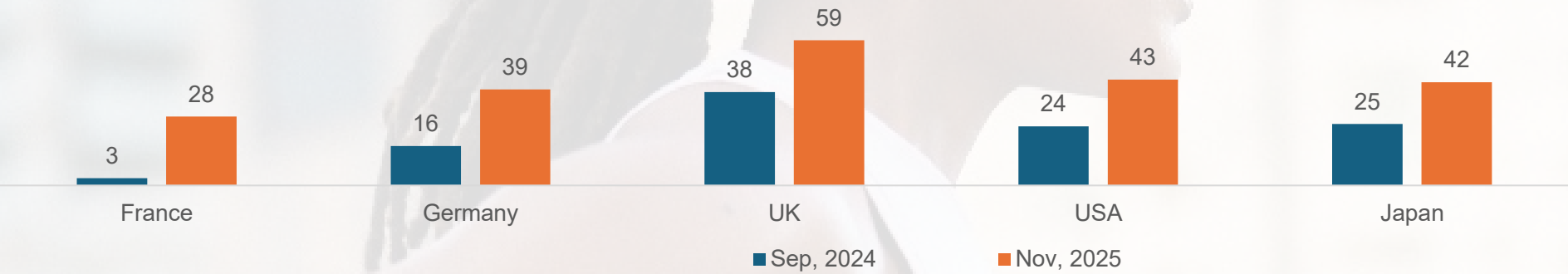
Global economy heading for moderate recovery with growing purchasing power of higher-income consumers.

- Key developed markets hold strong spending power, especially among high-income households

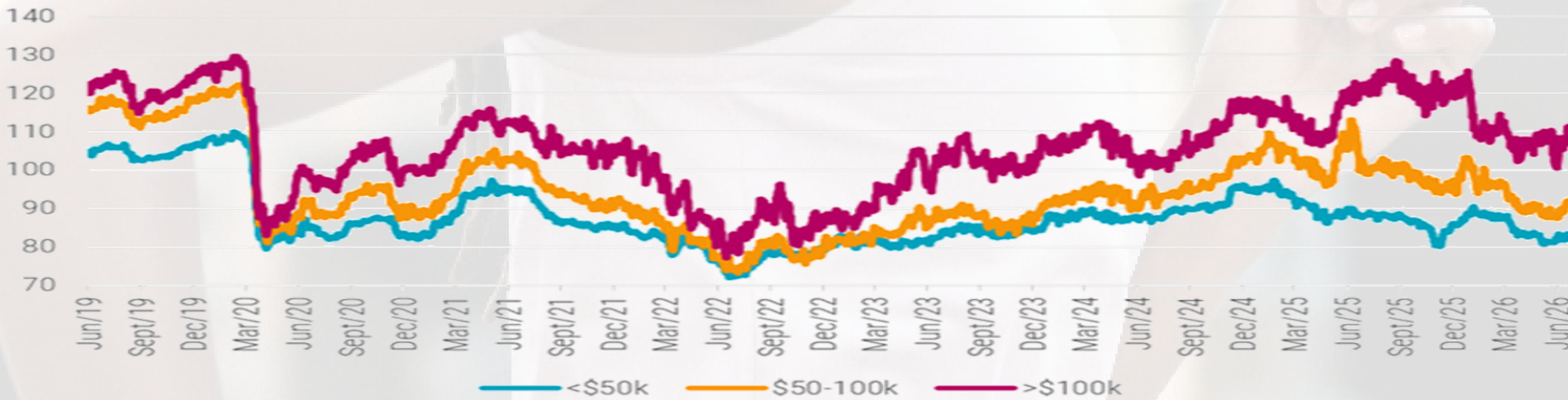
Global and Regional GDP Growth Forecasts (%) (Real GDP Growth, Annual Percentage Change)
GDP in Europe and the USA is stabilizing or edging up



Net Share of Consumers Planning to Increase Spending in the Next Six Months (%)
Consumers in Europe, the USA, and Japan show strong willingness to increase spending



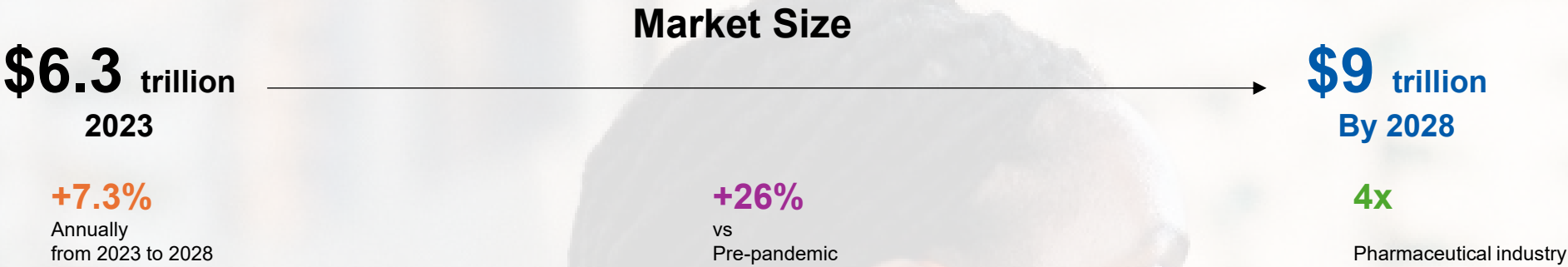
Consumer sentiment by household income
Consumer sentiment is generally higher among high-income households.



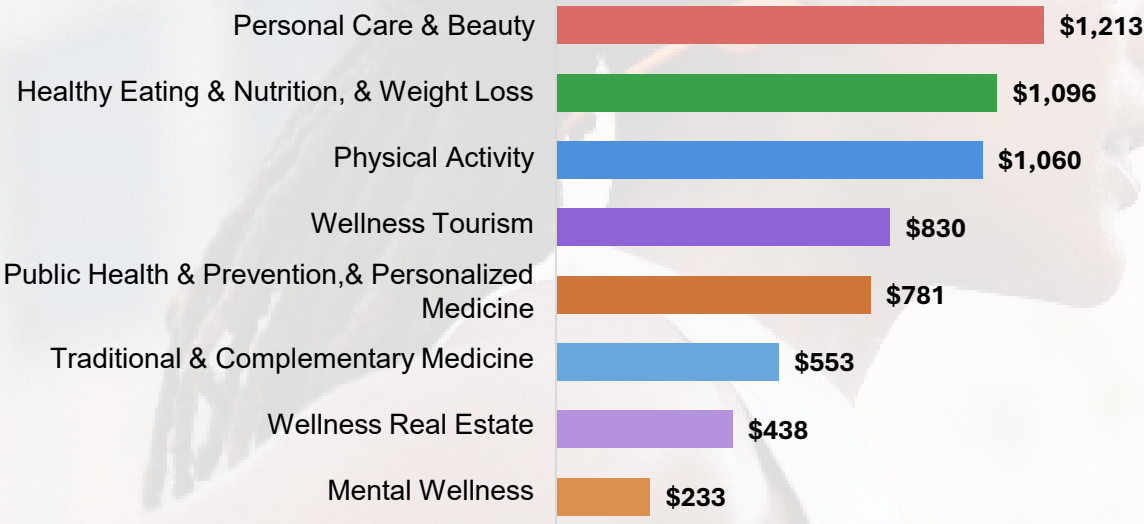
Global health and wellness engagement has risen significantly since the pandemic

- the West is hitting exercise, the East is hitting the health data

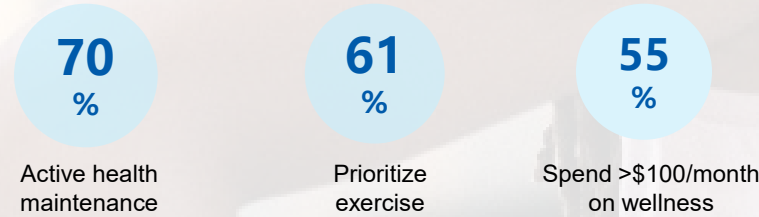
The Health & Wellness (H&W) industry has transformed into a vibrant, interconnected ecosystem that touches every corner of daily life.



Top Sectors (\$B)



Global: Proactive wellness has become the global default



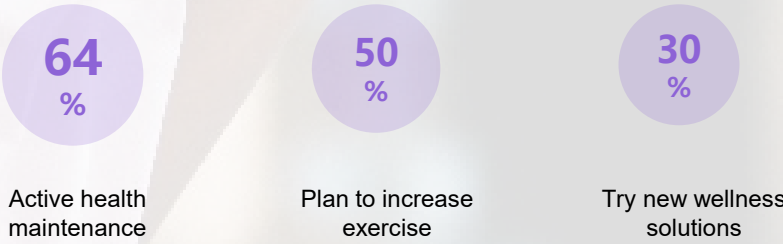
USA: Pursue wellness actively but share data cautiously



ASIA-Pacific: leads in proactive, data-driven wellness

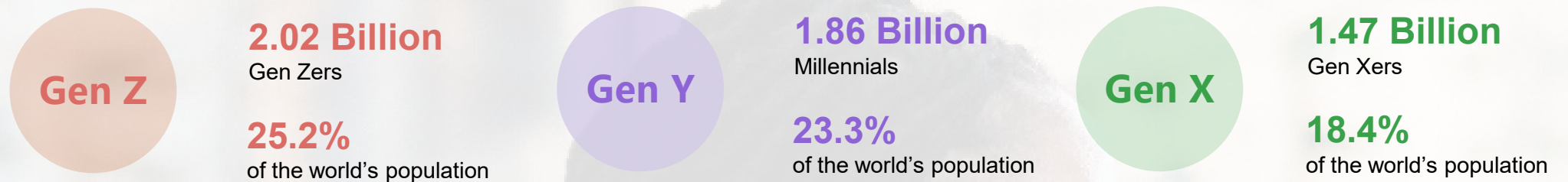


Western Europe: lags in wellness engagement and openness to new solutions



As the largest consumer generation, Gen Z is driving demand through its openness to innovation, desire for self-expression, and deep integration of technology and audio into everyday life.

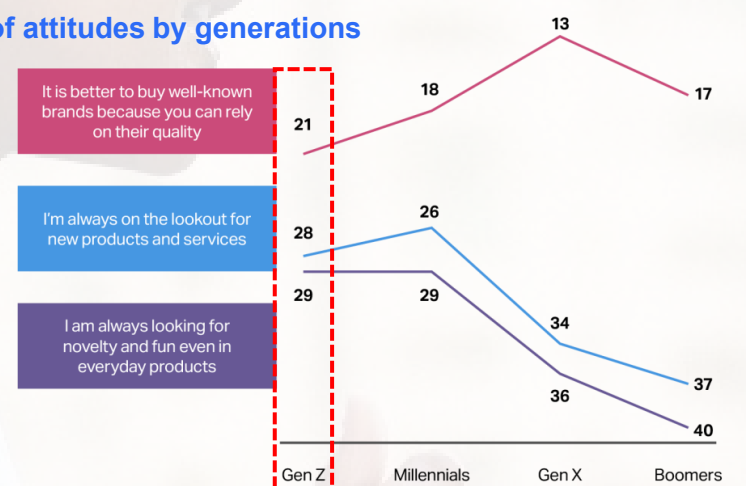
Gen Z is the largest generation ever.



Gen Z is more open to brand exploration and innovation, with consumption driven by novelty and self-expression.

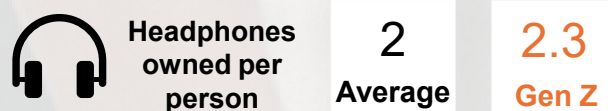


Rank* of attitudes by generations



Gen Z are power users in the T&D space, with audio deeply embedded in their daily lives.

In the T&D space, Gen Z is spending more on electronics. Headphones/headsets and mobile computing are their most purchased categories.



40% switch between headphones at least once a week.



Gen Z and millennials spend 4h30m a day with audio

DAILY TIME SPENT WITH AUDIO SOURCES **BY AGE**



Technological breakthroughs foster the development of open-ear headphone.

- Technological upgrades continue to enhance the overall performance of open-style designs in terms of comfort and sound quality.

Sound Quality



Directional Sound Technology

By precisely controlling the direction of sound propagation, this technology minimizes sound leakage. It enables specific targets or listeners to hear the sound clearly while making it difficult for others to do so, thereby reducing disturbance to the surrounding environment and protecting personal privacy.



Active Noise Cancellation Technology

Captures ambient noise via built-in microphones and generates opposing sound waves to cancel it out, providing users with a clearer, more immersive wireless audio experience.



Bass Enhancement Technology

A technology that boosts and emphasizes low-frequency audio components, delivering a more powerful bass experience and minimizing low-frequency loss associated with open-ear designs.

Wearing Experience



Variable-pitch Silicone

Breaking away from the design logic of conventional uniform silicone, this design reconfigures the material's volumetric distribution. In the concha area, the silicone features a graduated, beveled profile; the density is increased around the sound outlet, while the material gradually thins out toward the sides.

Precise Pressure Distribution: By utilizing a variable-thickness design, the silicone is reinforced at points where the ear is prone to discomfort, while thinner material covers other areas. This approach maintains a compact, comfortable fit, ensuring wearing comfort while minimizing the sense of bulkiness often associated with earphones.

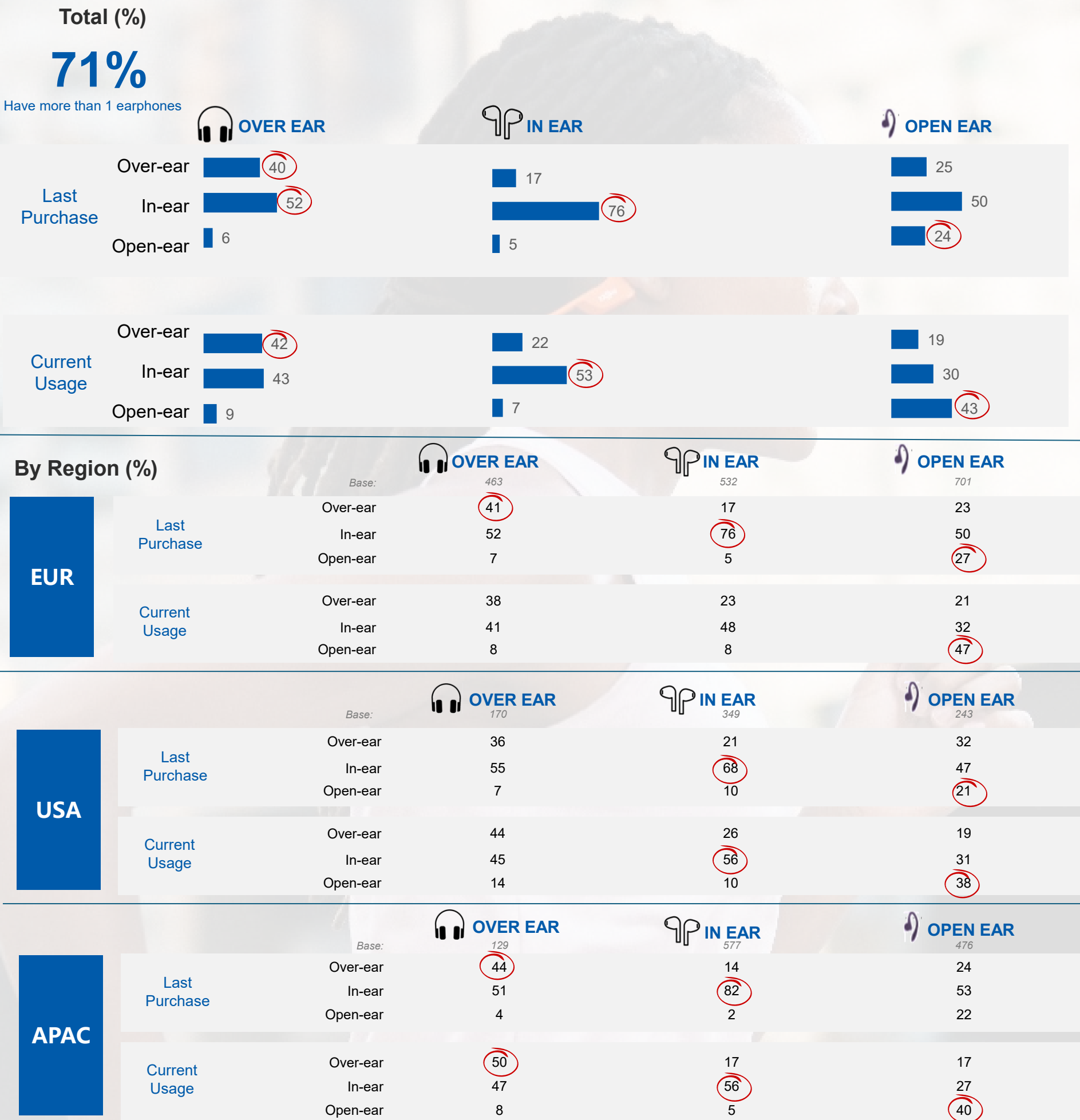
A woman with dark hair in a ponytail, wearing a white long-sleeved shirt and a light-colored cardigan, is sitting and looking out a large window. She is holding a brown paper coffee cup with a white lid. The window has a wooden frame and shows a blurred view of trees outside. A semi-transparent white rectangle is overlaid on the image, containing the text '02' and 'Stages & Trends Of Development'.

02

Stages & Trends Of Development

Open-Ear headphones are a strong alternative amongst the modern headphone repertoire.

- Although over-ear and in-ear still command high loyalty, open-ear —an emerging earphone type—are capturing sales from these traditional earphone/headphone types, showing promising growth momentum.
- Meanwhile, over 40% of open-ear purchasers also own other open-ear headphones, reflecting that open-ear has built up user retention, indicating a broad development prospect.
- By region, open-ear performs better in the USA with stronger ability to seize purchase share.



Significantly higher than other earphone type under 95% confidence level
of 1st time purchaser n=70; 1st time purchaser n=1458; Open-ear not 1st time purchaser n=1420;
purchasing recent headphones, which of the following earphone/headphone types did you purchase previously? [Single] /B1 Before the earphones/headphones purchased most recently, which other headphones do you also use?

Open-ear drive purchases through wearing experience—differentiating them from traditional earphone/headphone type driven by sound quality—and carve out a new growth path.

- Overall, sound quality, wearing experience and price are the most important drivers for buying headphone.
- Different from over-ear and in-ear, which prioritize sound quality and provide a secondary wearing experience at the product level, open-ear users have a prominent pursuit of wearing experience, especially for their lightweight and breathable design.
- In addition, open-ear users also have higher requirements for waterproof, dustproof, and sweat resistant.

Top5 Purchase Priorities (%)



Sound quality effect	27
Wearing experience	20
Price/promotions	20
Good reputation	14
Brand	14

Specific Considerations For Key Priorities (%)



Sound quality effect	
Good sound effects	22
Great volume	18
Powerful, clear bass	18
Wearing experience	
Not too heavy	22
Suitable size	20
Soft or skin-friendly materials	14
Does not cause sweating	10
Does not cause skin irritation	9



Sound quality effect	26
Price/promotions	24
Wearing experience	15
Battery life	13
Brand	13



Sound quality effect	
Good sound effects	20
Great volume	18
Wearing experience	
Suitable size	15
Not too heavy	15



Wearing experience	28
Sound quality effect	19
Easy to carry	14
Durability	13
Price/promotions	11
Good reputation	11

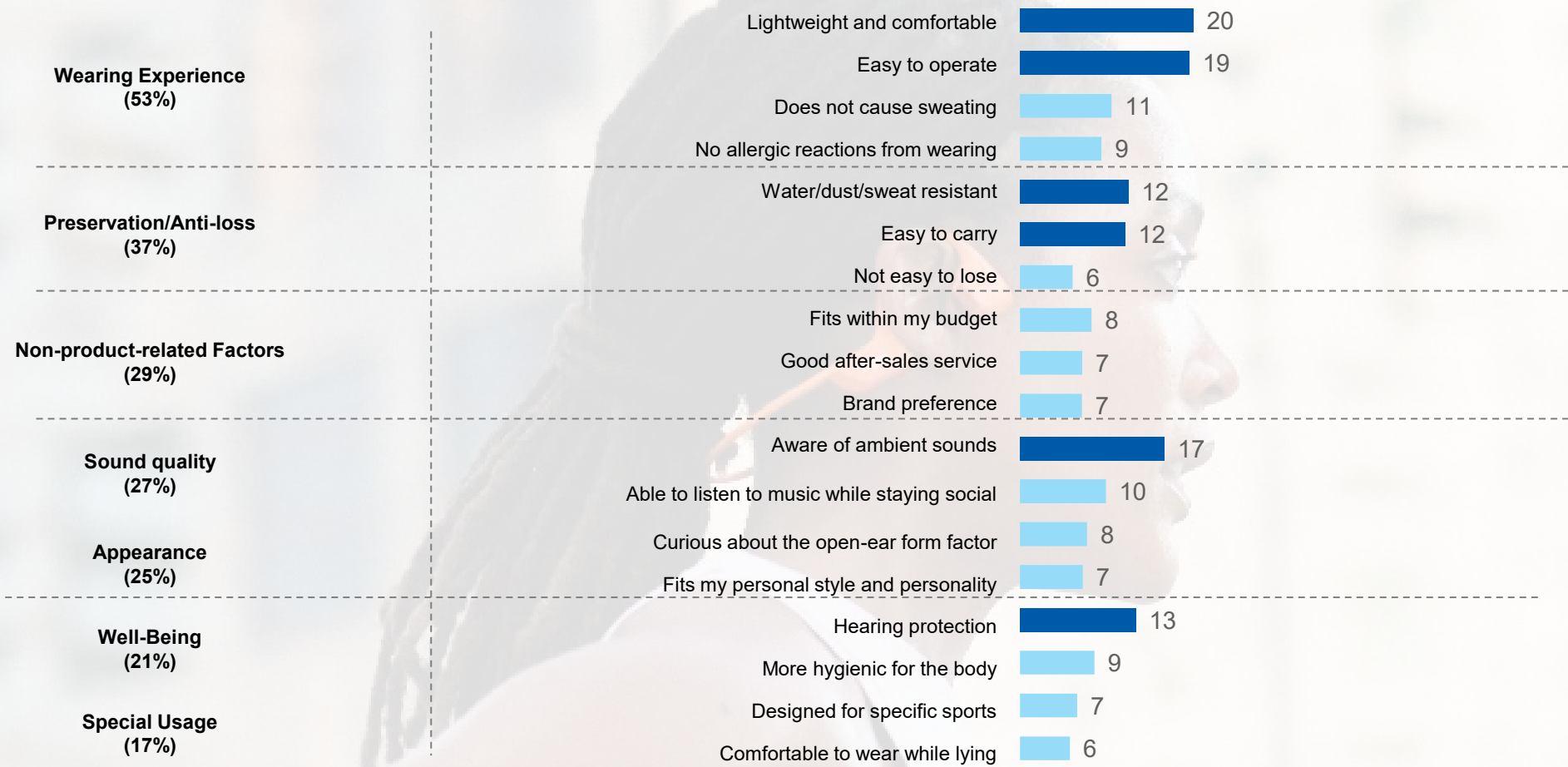


Wearing experience	
Not too heavy	28
Suitable size	21
Does not cause sweating	19
Soft or skin-friendly materials	18
Does not cause skin irritation	14

Comfort and ambient sound awareness are the primary reasons consumers choose open-ear; comfort, especially secure fit, drives the headphone type switching

- For users switching from over-ear, the advantages of open-ear are concentrated on comfort, while curiosity about the new type also drives the conversion.
- For users switching from in-ear, the advantages of open-ear are more focused on resistance to sweating, while promotions also plays an important role

Key Reasons for Purchasing Open-ear (%)



Top10 Reasons for Switching Type (%)

Classification	Factors	
Non-product factors	Wanted to try a different type	20
Non-product factors	Not attractive promotions	17
Non-product factors	Wanted to try a new brand	15
Non-product factors	Too expensive	14
Wearing experience	Not fit securely	13
Wearing experience	Materials were not soft enough	11
Non-product factors	Attracted by new brand ads	11
Wearing experience	Design or size was not suitable	10
Wearing experience	Too heavy and tiring to wear	10
Wearing experience	Felt hot or cause sweating	10

Switchers from over-ear:

- 17% Wanted to try a different type
- 11% Not attractive promotions
- 11% Too heavy and tiring to wear
- 11% Wanted to try a new brand
- 10% Unattractive appearance
- 10% Too expensive

Switchers from in-ear:

- 20% Not attractive promotions
- 17% Wanted to try a different type
- 15% Not fit securely
- 14% Too expensive
- 13% Materials were not soft enough
- 13% Felt hot or cause sweating

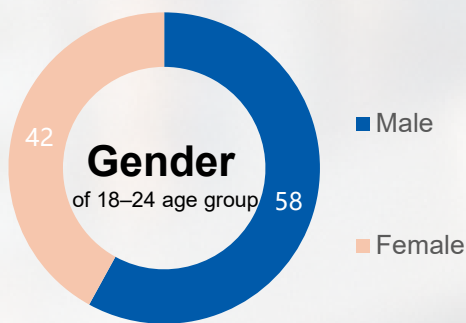
*product related factors

Significantly higher than other earphone type under 95% confidence level
n=997; from over-ear switcher n=218; from in-ear switcher n=384; open-ear buyers N=1818
Q1 Why did you purchase your most recent headphone purchase?/ A7 Why did you purchase your most recent headphone purchase?/ A7-1 Among the reasons for switching from the brand to other brand for your most recent headphone purchase?/ A7-1 Among the reasons for switching from the brand to other brand for your most recent headphone purchase?

- Compared with over-ear and in-ear users, open-ear users skew more male and younger, especially among those aged 18–24. They are more likely to be office employees or professionals, use headphones for longer duration, and include more tech enthusiasts and trendsetters.

Headphone usage (%)		OVER EAR	IN EAR	OPEN EAR
Usage Frequency	Everyday	55	57	54
	Not everyday	45	43	46
Usage Duration	1-2h per day	43	46	36
	>2h per day	57	54	64

Regarding the younger age group (aged 18-24 y/o) that open ear attracted, they are mostly students and young white-collar demonstrating strong engagement and interest in headphone

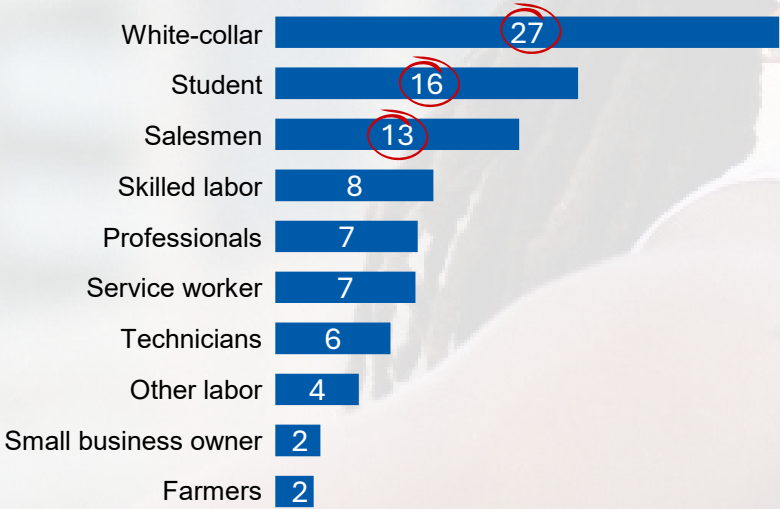


Consumers of 18-24y/o :

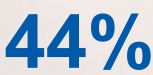


Used earphone 2h+/day

Occupations (%)



Attitude Towards Headphones :



Have more passion over earphone



Expert over earphone



Often being asked for advice over earphone

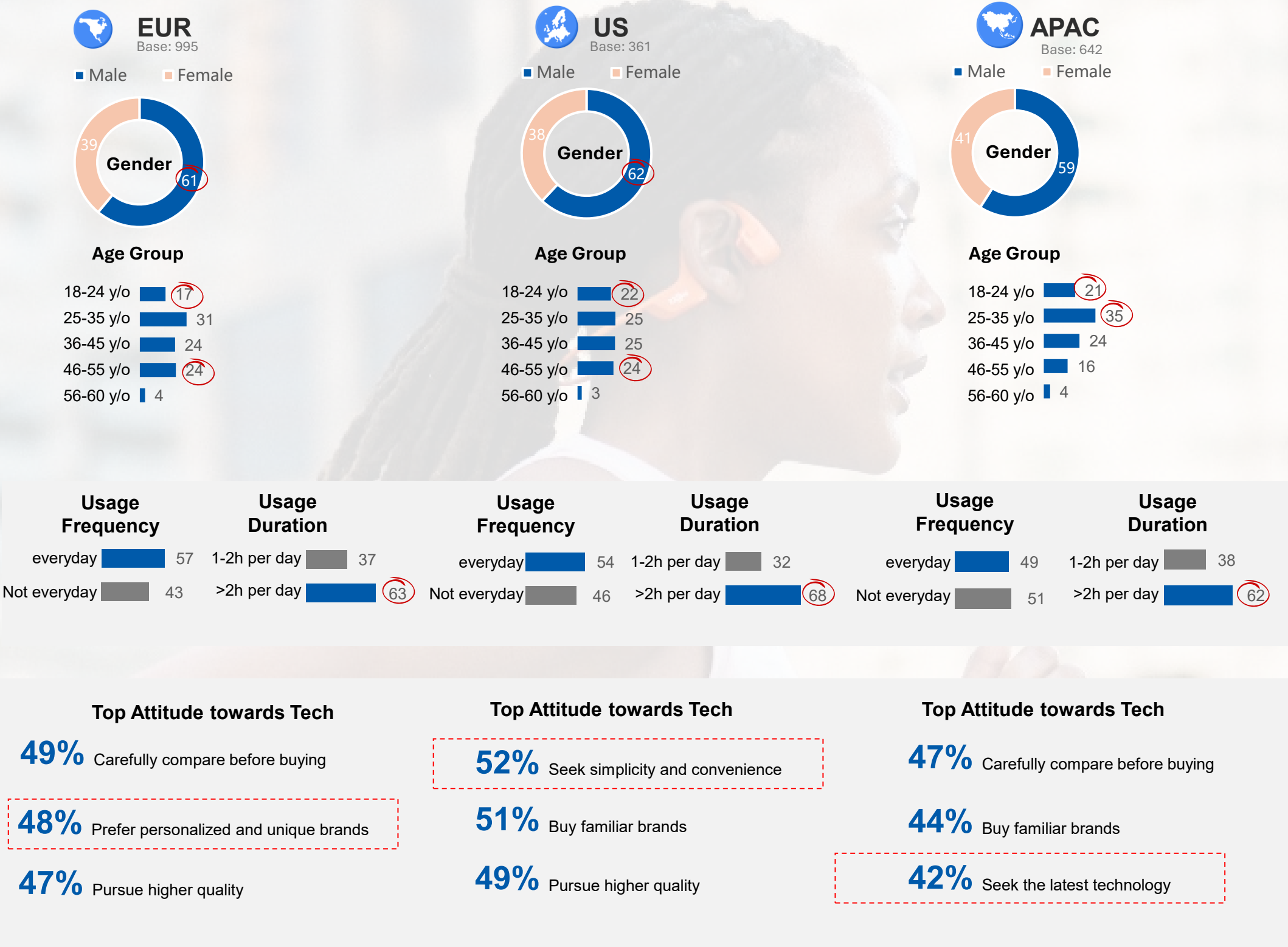
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I feel like it's still very new technology. Every company is making these kind of headphones now, and so I'm like, you know, if they popularized it, like, there has to be a reason.

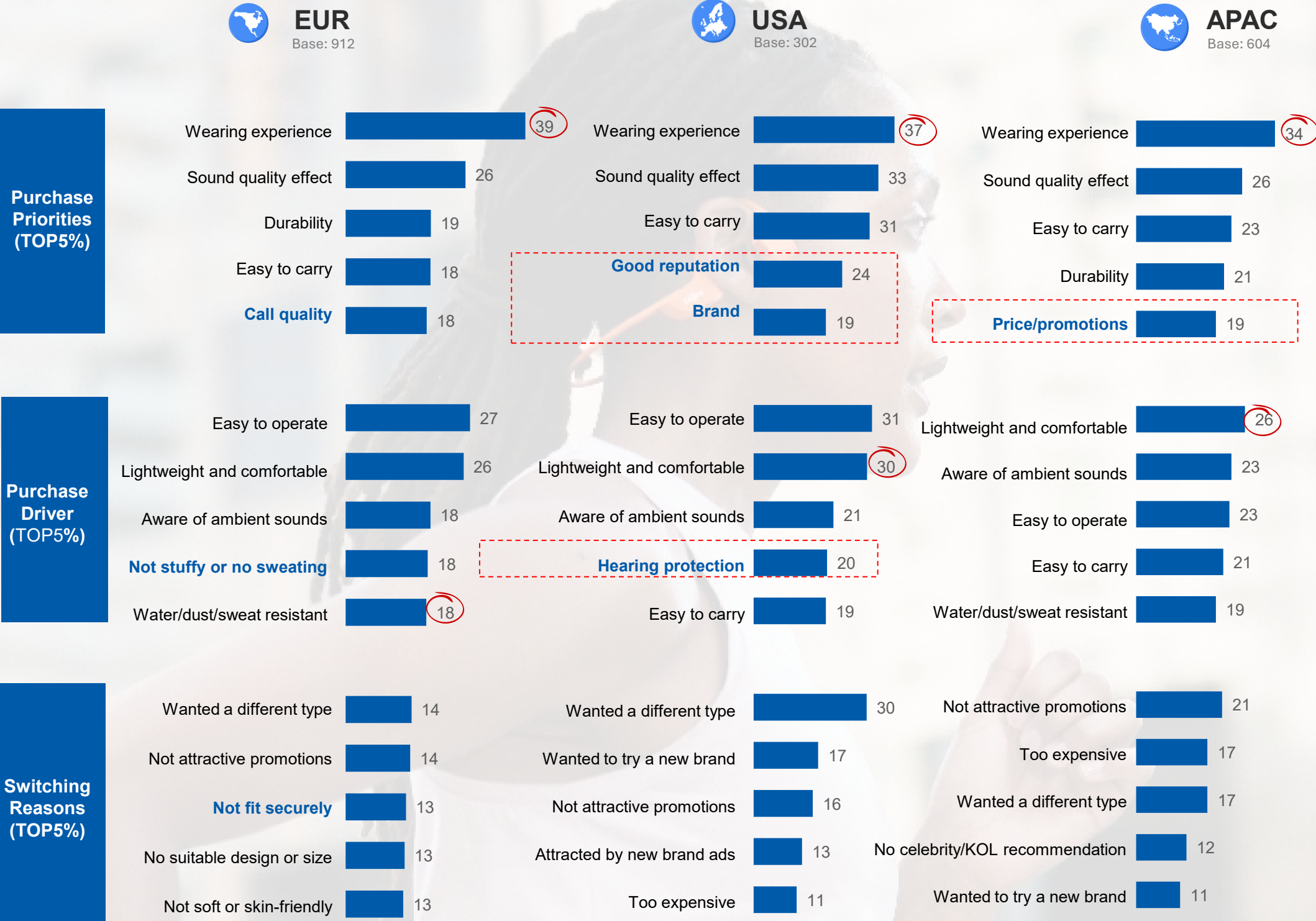
*I use them every weekday usually, sometimes on the weekend. Say, I use them about 6 hours a day. The open-ear headphones have replaced other types of headphones **in all situations**. I use them for working out, because I like being able to hear what's around me. And I use them at work because I need to be able to hear if someone comes to talk to me. (Shokz Open Fit 2 Plus user, 24y.o., Legal assistant)*

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The open-ear user base in Europe and the USA skews older and male, as European value more on uniqueness, American prioritize efficiency; users in APAC are younger/more trend-setting



European consumers are more interested in the potential of open-ear for daily use (call quality has higher importance); in the more developed USA market, brand/word of mouth is valued; whereas consumers in APAC tend to be younger and more price-sensitive



Overall, the open-ear is in a phase of rapid expansion and becoming a strong alternative amongst the modern headphone repertoire; it boasts outstanding performance advantages and a high-quality user base.

High-Quality User Base

Younger/well-educated category heavy user

- The user profile is skewed towards young people (18-24 years old) and men, mostly white-collar workers and professionals. They use headphones for longer periods daily, and prioritize "latest technology" in their consumption, making them trendsetters in the headphone category.

The open ear has captured highly influential users among the youth

19%

- Earphone/headphone expert
- Heavier usage of category

Differentiated Strength

Core competency

comfortable wearing experience

- No stuffiness and lightweight design (vs. over-ear)
- Freeing the ear canal for better health and hygiene (vs. in-ear)
- Key product-level reason why users switch from over-ear/in-ear headphones to open-ear headphones

Key to seizing type switcher from over ear/in ear

Secure fit

- Key reason why earphone/headphone users change their type
- Key reason for in-ear users switching to open ear

Reasons driving open-ear purchase

Ambient sound awareness

- Top reasons for why choosing open-ear

Promising Prospect

76%

Open-ear sales comes from other categories

Indicating the category is in a rapid expansion stage

43%

Open-ear buyers already own other open-ear headphones

Given that the previous headphones purchased by "open-ear" buyers were predominantly of other types, this indicates the sustainability of the category expansion

A woman with dark hair in a ponytail is looking out a window. She is wearing a white long-sleeved shirt and a light-colored cardigan. She is holding a brown paper coffee cup with a white lid. An open ear device is visible in her ear. The background shows a blurred view of trees outside the window.

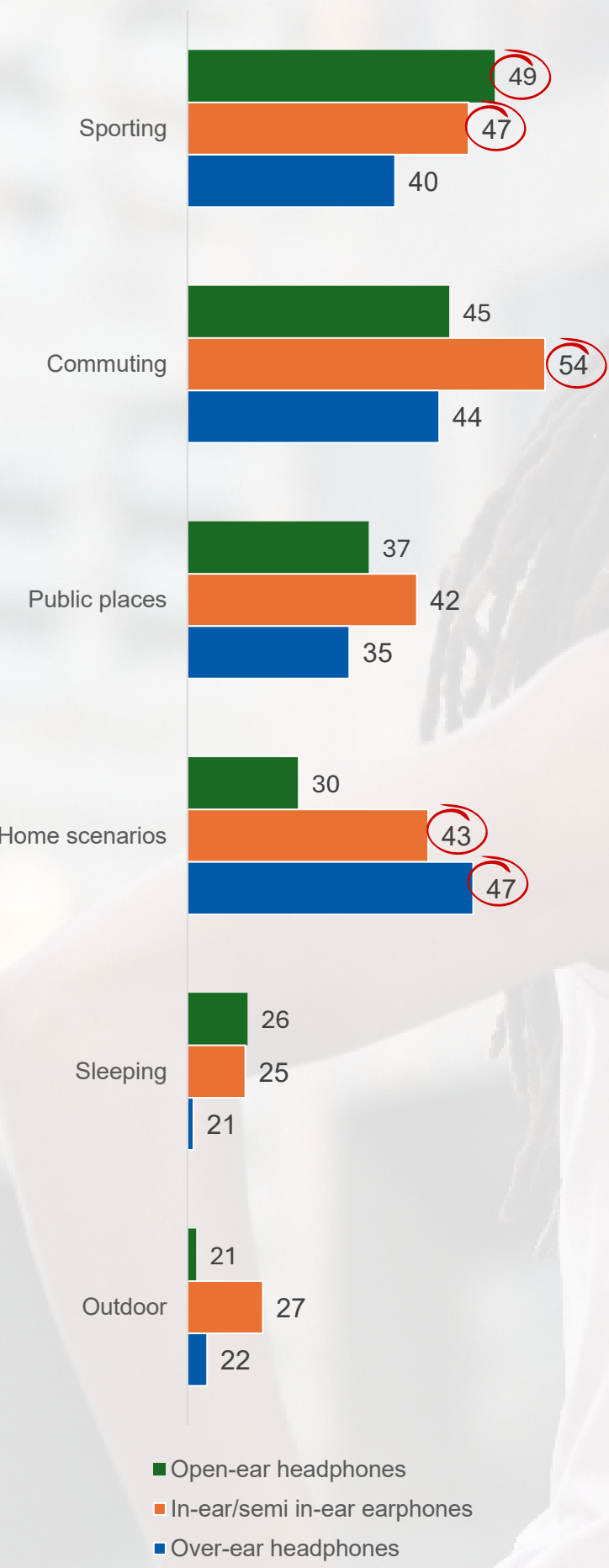
03

Usage & Needs of Open Ear

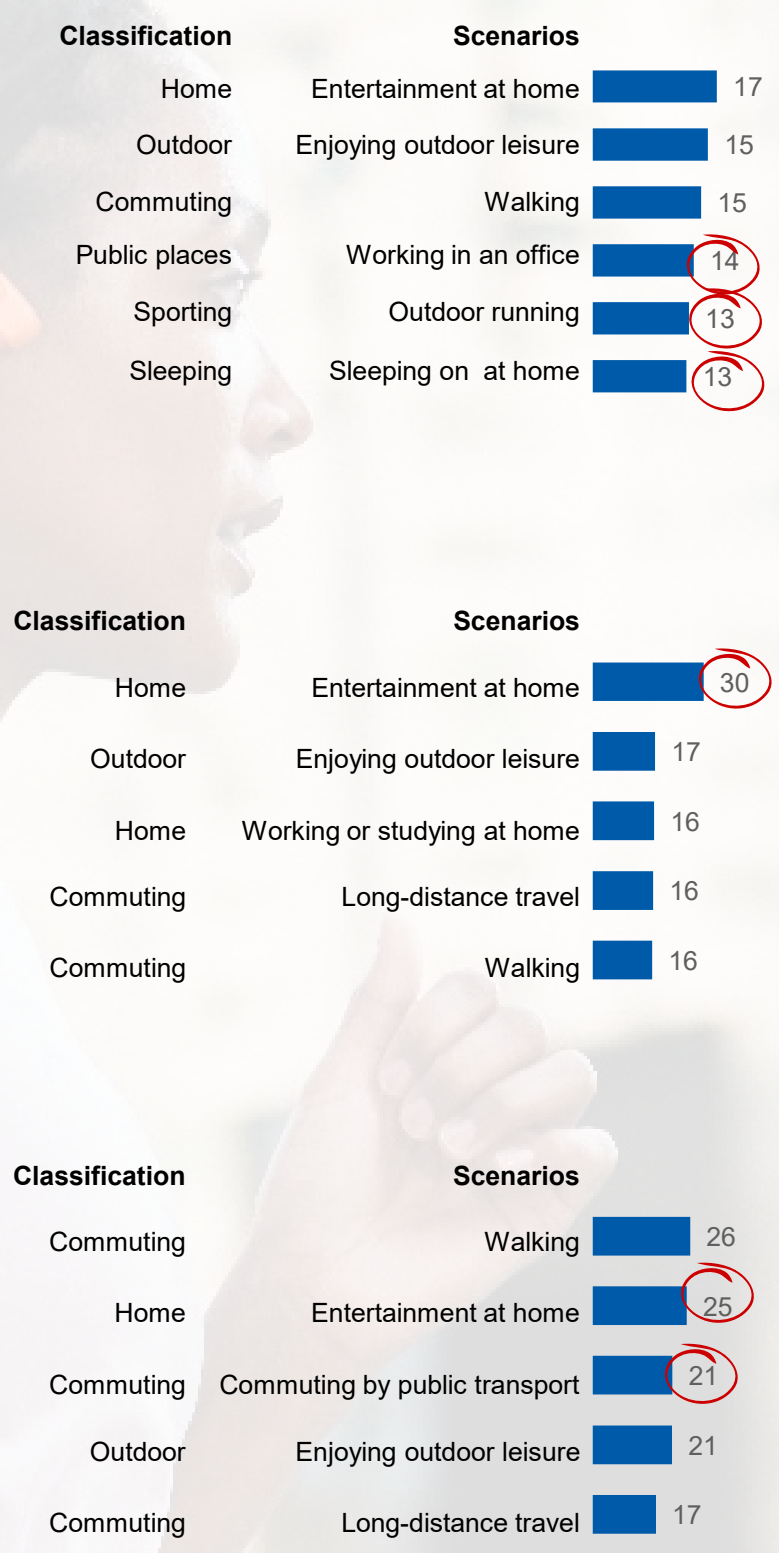
Open-ear is adding incrementally to the category, via new usage occasions

- The use of traditional types focuses on sporting/commuting/home scenarios
- While over-ear headphones lean toward static, high-immersion environments, and in-ear/semi in-ear headphones dominate mobile commuting.
- Unlike traditional types, open-ear see high usage rates in scenarios involving prolonged wearing while out and about, such as in public places.

Classifications of Usage Scenarios (%)



Specific Usage Scenarios (%)



Significantly higher than other earphone type under 95% confidence level

Open-ear Users N=1998; Over-ear Users N=1687; In-ear users N=2999

B5. In your daily life, in which occasions do you most often use earphones/headphones? [Multiple]/B6 For each of the following scenarios, which type of earphones/headphones do you typically use? [Multiple]

Sporting is open-ear core advantage

- Particularly outdoor running, gym workouts, and cycling has higher ranking as the scenarios that open ear has advantages in
- Meanwhile office environment that involves social interaction is also highly perceived as open-ear advantage scenarios



Sporting establishes open ear core competitive advantages in usage scenarios

Cases of Scenarios that users consider open ear having advantage in:

- TOP 1** Sporting 44%
- TOP 2** Commuting 37%
- TOP 3** Public Places 31%

V.S.

Top3 Category Daily Use Scenario Cases:

- TOP 1** Commuting 54%
- TOP 2** Sporting 50%
- TOP 3** Home Scenarios 46%



Office and daily exercise represent the core strengths of the open-ear.

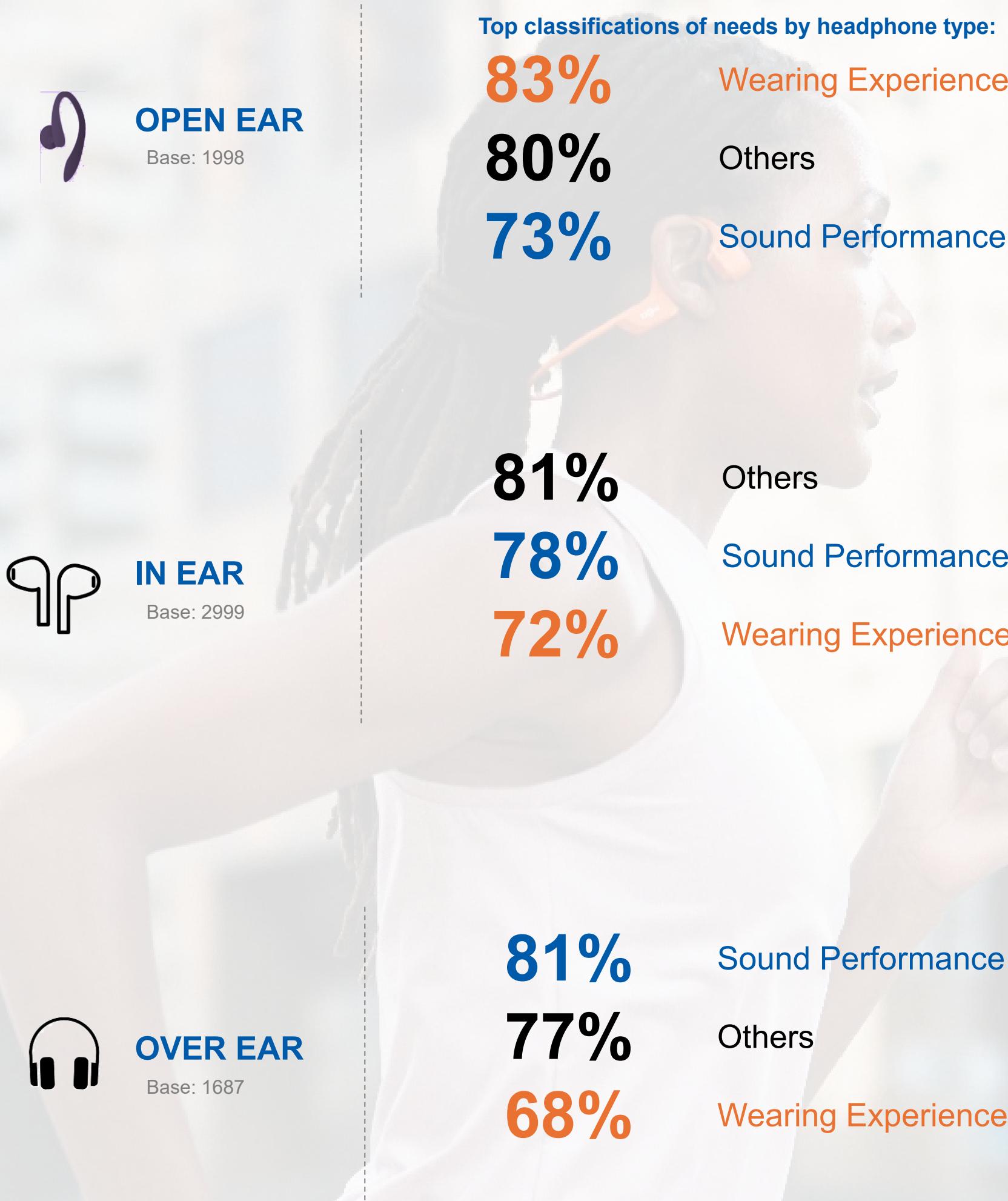
Top15 Open-ear Have Advantages in(%):

<u>Classification</u>		<u>Factor</u>	Scenario Ranking in	
				<u>Total Cate</u>
Commuting		Walking	13	2
Public places		Enjoying outdoor leisure activities	11	3
Home Scenarios		Entertainment at home	11	1
Public places		Working in an office	11	9
Sporting		Indoor / Gym workouts	10	11
Sporting		Outdoor running	9	10
Sporting		Bicycle riding / Cycling	9	20
Commuting		Commuting by public transport	8	4
Commuting		Riding	8	19
Public places		Public leisure	8	7
Commuting		Driving/taking a car/taxi	8	18
Commuting		Long-distance travel	7	5
Sleeping		Sleeping on a bed or sofa at home	7	13
Public places		Working or studying in a noisy public place	7	12
Sleeping		Sleeping or napping on public transportations	7	15

Scenarios that ranks higher in open ear than total category, Which indicate open ear key advantages

Unlike other traditional types, open-ear consumer products focus chiefly on comfort.

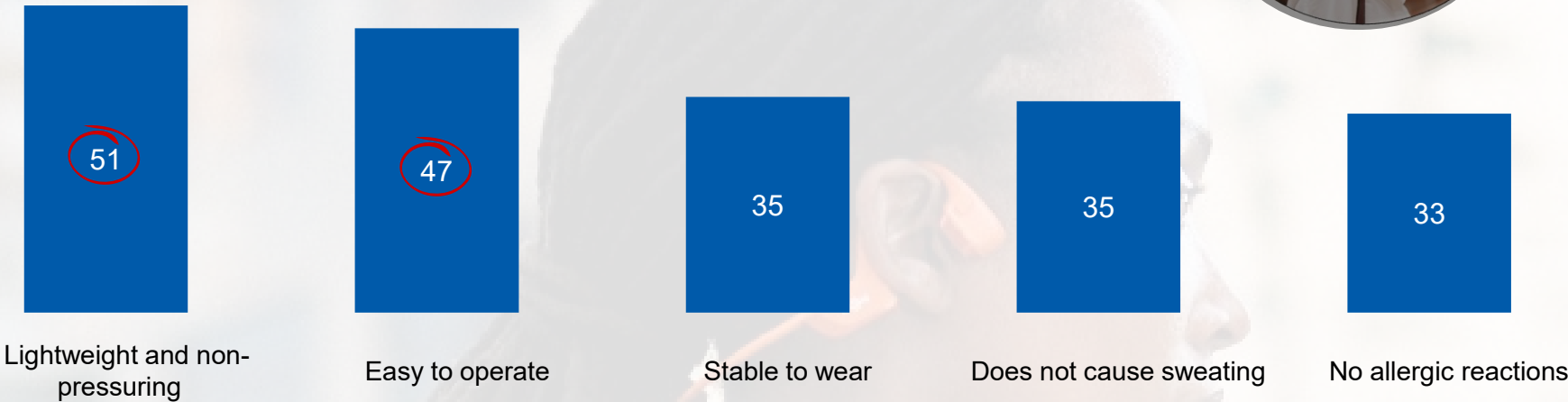
- Over-ear headphones excel in sound quality, while in-ear and semi-in-ear models primarily aim to satisfy basic experiential needs; in contrast, open-style consumer products focus chiefly on comfort.



In the realm of open-ear, comfort /secure fit are key advantages.

- Due to the advantages of comfort and a secure fit, open-ear are often worn for extended periods across various scenarios, creating a need for convenient operation.

Specific needs in-related to wearing experience | Open ear(%):



Advantages of Open-Ear Design

- The long-lasting comfort of open-ear headphones enables extended wear without concerns about ear pain or ear health issues.

I have to wear them so many hours a day that *traditional headphones or in-ear earbuds are way too uncomfortable. I would be in a lot of pain if I had to wear those as long as I wear these.* And I probably would not have lasted as long in this job. (Shokz Open Fit 2 user, 54y.o., Customer Service Representative)

- A secure fit reduces concerns about headphones falling off or getting lost, particularly in dynamic scenarios such as commuting and outdoor activities, helping users stay focused on what they are doing.

If the helmet were to slip for some reason, or a fly got in, or they shifted, I just get an uneasy feeling that they could fall out. *Yeah, they're not that expensive, but it would suck if they fell out on the ground. That's why I decided on the ear hooks, because they have this hook so I can put my helmet on and take it off.* (Soundcore AeroFit Pro user, 32y.o., Engineer)

Especially when running, *it's not great if they fall under the treadmill, because then not only is your workout interrupted, but you also have to start a search party.* I see that regularly with people at the gym who have Apple AirPods, for example, and then lose them. (Soundcore AeroFit user, 43y.o., Key Account Manager)

Scenario-Driven Emerging Needs

- Given the widespread use of open-ear headphones in dynamic scenarios, quick and intuitive controls are essential.

And as I said, the controls on the headphones. For me, for example, *it's more important during sports that I can easily control the headphones, because I can't necessarily hold my phone in my hand while cycling,* and would otherwise only be able to change songs at a traffic light. (Shokz Open Run Pro 2 mini user, 30y.o., Freight forwarding & logistics services clerk)

In terms of sound, open-ear delivers decent audio quality and has advantages in ambient sound awareness.

Specific Needs Related to Sound Performance | Open ear (%):



Advantages of Open-Ear Design

- **Maintaining awareness of the surrounding environment helps users feel safer during daily movement and exercise by enabling them to detect potential hazards in real time.**

And I think that's why where I used to even just listening with my earbuds that were noise-canceling or just regular earbuds just to hear with them inside of my ear, I would always wear one at a time. And the main reason for that is because I get scared of things happening around me. And as a female, that's not something that you wanna deal with. That's that's, like, a scary situation. I mean, I think that's for anybody, but definitely for a female when you're walking around and you don't know that somebody's walking upon you, that's not a good feeling. (Shokz Open Dots One + Sony LinkBuds Clip user, 47y.o., Business Analysis Manager)

Especially in public spaces, it's important, due to the many risks, that I'm still somewhat present and can participate in traffic, for example, hearing sirens, which isn't guaranteed with every pair of noise-canceling headphones, most of which are in-ear models these days. (Soundcore AeroFit user, 43y.o., Key Account Manager)

- **At the same time, it allows them to respond naturally to people around them, helping avoid awkward or impolite social situations.**

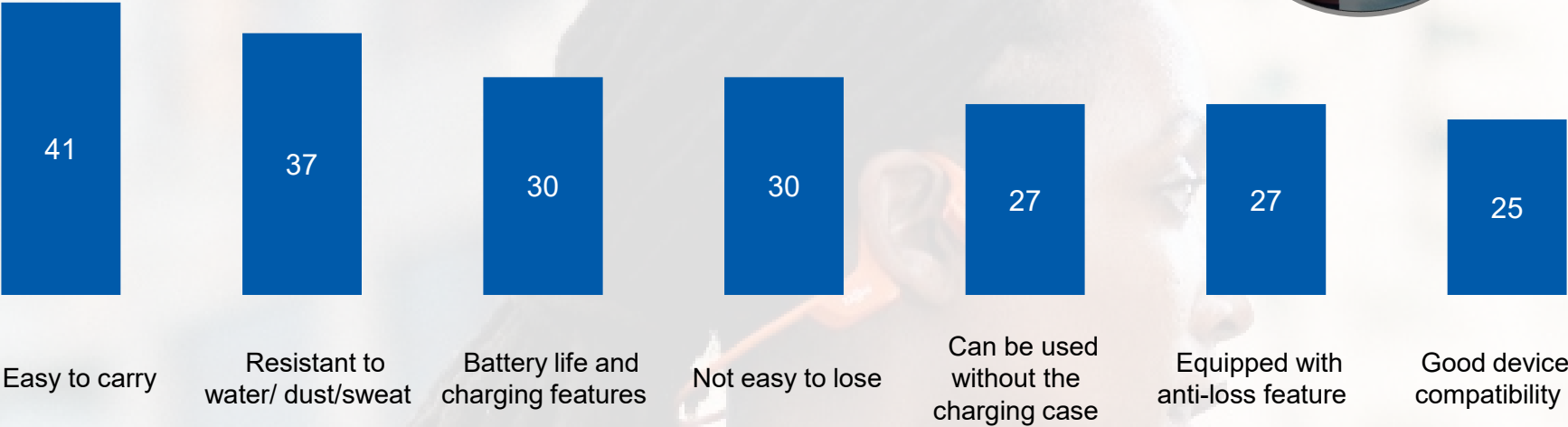
It just feels disrespectful. And then, like, now I work with attorneys, and they're really, like, intense people, so if I were to be, like, fumbling around and all that, they don't have patience for that, and they would, like, yell at me for it. (Shokz Open Fit 2 Plus user, 24y.o., Legal assistant)

I sat at the kitchen table focused on tasks multiple times, only to look up and find someone had been standing there speaking to me for three whole minutes without my awareness. This kind of incident was my biggest pain point. About six months ago, I wore Beats headphones while sitting at the table working and browsing online. When I lifted my head, I realized my girlfriend had been talking to me for two minutes, and I had not caught a single word she said. I felt guilty afterwards, and she was upset that I failed to listen to her. (Shokz Open Fit Pro + Shokz OpenMove + Soundcore AeroFit 2 user, 51y.o., Quality consultant)

Meanwhile, open-ear users have a strong demand on portability, reduced risk of loss, and durability against water, dust, and sweat.



Specific Needs Related to Other Factors | Open-ear(%):



Scenario-Driven Emerging Needs

As users wear their headphones for longer periods and across a wider range of scenarios, needs such as portability and water resistance become increasingly relevant.

■ A compact and portable design makes headphones easy to carry and use across different situations.

I chose these because even on my trip that I went on few weeks ago on the plane, at some point, I had them on, I think, from in the Lyft ride. And going and coming on the plane, I rather have pulled these up because they were lightweight. I was using them for a little bit, and at some point, I did put on the headphones. But these *because they're so lightweight and they're already in my pocket, I just throw these on*. (Soundcore AeroFit 2 user, 35y.o., Help Desk Analyst)

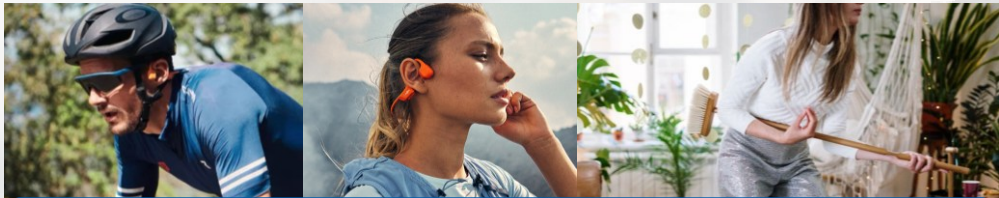
■ Water and dust resistance provide greater confidence during outdoor activities while also reducing concerns about accidental exposure to water or other everyday mishaps.

If I run outdoors, waterproofing is also very important to me. Sometimes I end up running in heavy rain. In the past, when I used wired earphones for running, I would often stuff them into my pocket afterward. *Occasionally I'd forget to take them out and they'd end up going through the washing machine with my clothes. So durability and water resistance are really important*. With open-ear headphones, it's much more convenient. When I'm done using them, I simply put them back into the charging case. (Soundcore Aerofit user, 43y.o., Key Account Manager)

Long-lasting comfort, awareness, and thoughtful design enable seamless transitions across tasks and environments.

- Together, these advantages support extended wear while enhancing safety and responsiveness.

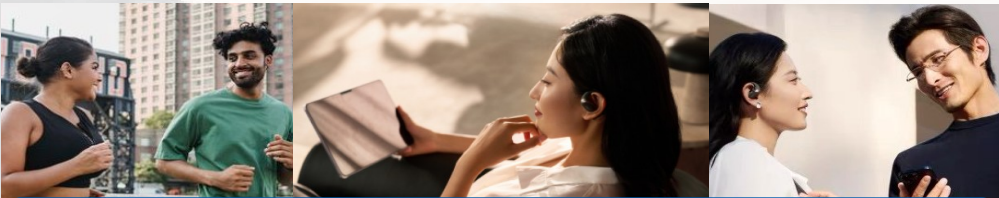
Advantages of Open-Ear Design



Long-Lasting Comfort & Secure Fit

Comfortable enough to forget, secure enough to focus.

- **Sports & Fitness:** Exercise without worrying about headphones falling off or getting damaged.
- **Commuting & Travel:** Navigate busy environments with confidence.



Situational Awareness

Enjoy personal audio while staying connected.

- **Sports & Fitness:** Stay aware of hazards and alerts.
- **Home & WFH:** Stay responsive to family and pets.
- **Office:** Respond without missing important conversations.
- **Travel & Public Spaces:** Acknowledge traffic alerts and interactions.



Thoughtful Design Features

Scenario-Driven Emerging Needs

The small details that make a meaningful difference.

- **Sports & Fitness:** Reliable performance across diverse outdoor environments and weather conditions; Quick and intuitive controls without compromising safety or causing distraction

Support Diverse Needs Across Scenarios & Effortless Transitions

Previously, my in-ear earbuds were uncomfortable for long-term wear, so I kept them in the charging case most of the time. When a call came in, I had to pick up my phone, take the earbuds out of the case, and put them on mid-call. After hanging up, I had to put them away again. This cumbersome process significantly distracted me while driving. By contrast, the new headphones can be worn continuously and connect automatically, creating a safer driving experience. (Shokz OpenDots One + Sony LinkBuds Clip user, 47-year-old Business Analysis Manager)

Bone conduction offers advantages in sports, while ear-clip/ear-hook expand the scope of open-ear daily usage, positioning open-ear headphone to become an integral part of consumers' everyday routines.



◆ Open-ear hook:
Better suited for daily use

Top3 Categories of Use Cases:

Sporting 46%

Commuting 44%

Public places 38%



◆ Open-ear clip:
Covers a wider range of scenarios

Top3 Categories of Use Cases:

Sporting 46%

Commuting 41%

Public places 32%



◆ Open-ear ear bone conduction:
Specialized in sports

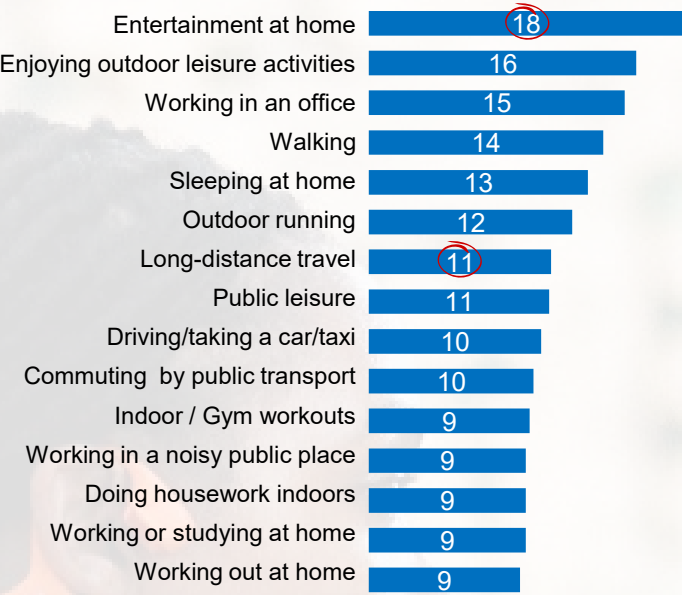
Top3 Categories of Use Cases:

Sporting 54%

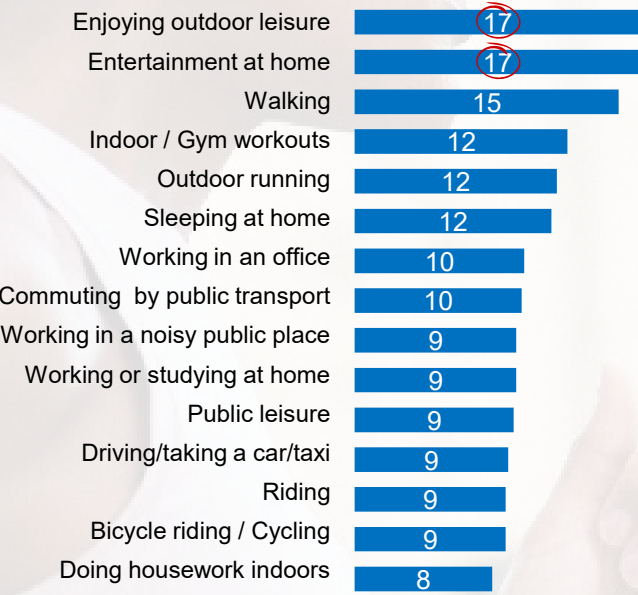
Commuting 46%

Public places 37%

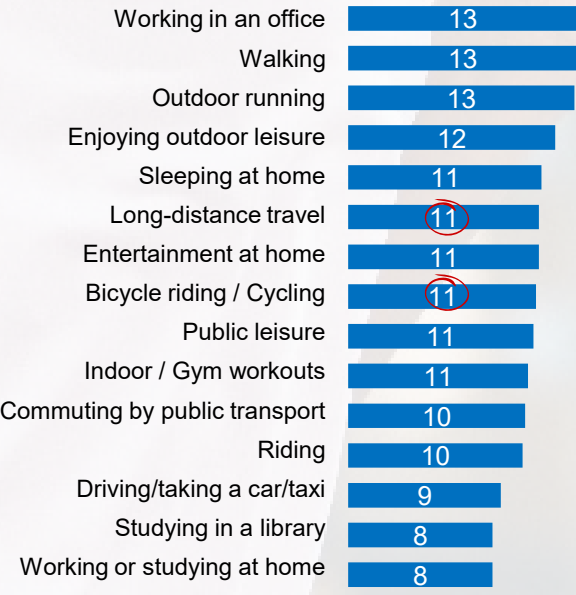
Top15 Specific Scenarios (%) :



Top15 Specific Scenarios (%) :



Top15 Specific Scenarios (%) :



Significantly higher than other earphone type under 95% confidence level
Bone conduction users N=633; Ear hook users N=626; Ear clip users N=880
In each of the following scenarios, which type of earphones/headphones do you typically use? [Multiple] / : B7-2. In each of the following scenarios, which aspects are important to you when using open-ear earphones? [Multiple]

As to bone conduction, there is a strong demand for prolonged use in sports scenarios: durability (anti-loss/battery life) and comfort.

Key Needs of Bone Conduction



Advantages of Open-Ear Design

- **Lightweight and comfortable to wear**, without adding pressure to the ears, making them ideal for sports, while remaining compatible with helmets during cycling. The integrated design also provides a more **secure and stable fit**, eliminating concerns about losing a single earbud.

I find them very comfortable to wear. The headphones sit just lightly on your head. So they're very, very comfortable, and you barely notice them while you're riding. The stability is also very good. With these headphones, I don't have to worry about them falling out of my ears. They sit around the ear. They have the neckband, which means I can't lose them individually. All the headphones I compared were also open-ear headphones, but they were the kind that attach to the outside of the ear. I thought that might bother me over the long term. Especially when cycling, I thought it would be a bit tricky, because you also have the helmet strap around your ear. So I thought if I also have the headphones there, or if I take my helmet off, I could knock the headphones out of my ear at any time. I also found the Shokz OpenRun much more comfortable than the others. (Shokz Open Run Pro 2 mini user, 30y.o., Freight forwarding & logistics services clerk)

- **In addition, bone conduction remains the only headphone form factor that enables underwater listening**, significantly expanding audio use into scenarios that were previously inaccessible.

I only considered bone conduction because I can only use bone conduction for swimming. It's just a completely different series, it's meant for swimming, and you can't wear the other headphones while swimming. First, they're not waterproof, and second, you obviously need bone conduction underwater and can't use... you can't establish a Bluetooth connection, which means you need an MP3 player. There are a few things that are deal-breakers, and that's why I got them. (Shokz Open Swim user, 20y.o., Medical Student)

Scenario-Driven Emerging Needs

- **Long battery life** also provides reliable support throughout the entire exercise session.

And also good battery life for when you're exercising or out for a walk for several hours. So, I think it's important for the headphones to have a long battery life to cover those times when you're out for a while, so you can use them the whole time. (Shokz Open Run Pro 2 mini user, 30y.o., Freight forwarding & logistics services clerk)

As to ear-hook , despite comfort, consumers places more emphasize on its appearance suits the needs of everyday settings.

Key Needs of Ear-Hook



Advantages of Open-Ear Design

- **Comfort and environmental awareness** support extended wear across a wide range of scenarios, from sports and fitness to calls, virtual meetings, and entertainment activities.

I usually use them 5-6 days a week. Depending on the day, I would say 2-4 hours a day. And I use them at work. I use them while I'm cleaning, while I'm at home just listening to music for entertainment. I use them outside for exercise while I'm running or hiking or cycling. I kinda use them for everything. They're kind of a go-to...My elderly parents often need my help, such as when they accidentally fall and require immediate assistance. Unlike working in an office where I only need podcasts or music for leisure, things are different at home. If I wear noise-isolating headphones to listen to podcasts or music at home, I might fail to notice if my parents fall over or call out for help. Nothing serious has happened so far, but there have been small incidents: my mother sometimes struggles to operate the TV and tries to get my attention by calling me, yet I cannot hear her. This also occurs when I join online meetings with headphones on, focus on finishing Excel spreadsheets, or immerse myself in my own world; I do not respond when she calls my name.(Shokz Open Fit Pro + Shokz OpenMove + Soundcore AeroFit 2 user, 51y.o., Quality consultant)

I wear the headphones quite often, so it feels completely normal to me. Sometimes I only realize after an hour that I'm even wearing the headphones, even though I haven't been listening to anything. So, that points to a high level of wearing comfort. (JBL SoundGear Sense user, 39y.o., Social services)

Scenario-Driven Emerging Needs

- While its design conveys professionalism and performance in sports and fitness scenarios, users still want it to look more **natural and stylish** when integrated into everyday life.

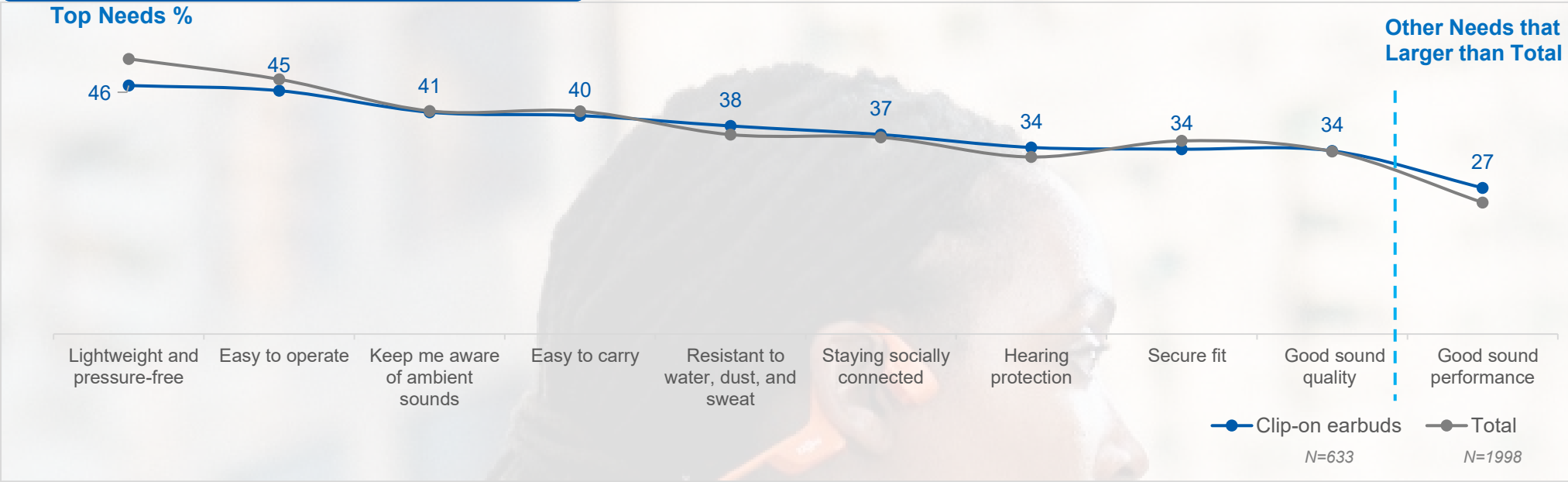
I want to mention one more thing: because of their appearance with the ear hook, open-ear headphones can sometimes look like a small hearing aid. (Soundcore AeroFit user, 43y.o., Key Account Manager)

So, There are some very clear strengths. The headphones don't slip and they fit well. They deliver good quality. The only downside is, I don't think they look very stylish. (Soundcore AeroFit Pro user, 32y.o., Engineer)

And with those ear hook things, the bone conduction ones, there are the ones that just sit on the ear and the ones that go around your head. I have to say, I looked at them and I understood the advantage, but... It's just too much for me and it looks a bit silly. (Soundcore C50i user, 28y.o., Law Student)

Consumers have multifaceted requirements for ear clip, placing relatively equal importance on comfort, ambient sound and ease of use, while also expecting a certain level of sound quality.

Key Needs of Ear-Clip



Advantages of Open-Ear Design

- **Compact, lightweight, unobtrusive, and aware of the surrounding environment**, ear-clip headphones have naturally become part of a wide range of everyday scenarios.

I love the fact that *they're really, really light, so I don't feel them hanging*. They're not distracting. I don't have to worry about pulling them in, popping them off and on. It's like one of those set it and forget it. (Shokz Open Dots One + Sony LinkBuds Clip user, 47y.o., Business Analysis Manager)

Since purchasing my OpenAir earbuds, they've essentially replaced any other earbuds I've used, with the exception of sometimes I just keep a wired set as a backup in case I forget my OpenAir earbuds or if there's not compatibility. The main situations I use my OpenAir earbuds are for *walking, hiking, exercising, cleaning, gardening, outdoor work, sometimes just chilling outside, listening to a podcast or audiobook, travel, long trips, etcetera*. (Bose Ultra Open Earbuds user, 55y.o., Teacher)

Scenario-Driven Emerging Needs

- **Comfort and environmental awareness remain key strengths of open-ear headphones, but these often come with compromises in sound quality. As ear-clip headphones become increasingly integrated into everyday scenarios, expectations for sound quality continue to rise.**

But there are sometimes when I don't wanna hear any surroundings. I just wanna immerse myself in the songs or the content that I'm listening to. And *with the OpenAir earbuds, I feel like I can't get a full immersive experience*. There's always a little bit of background noise that I can hear. (Bose Ultra Open Earbuds user, 55y.o., Teacher)

So for me, I think the sound quality is probably the most important. Like I said, if another brand had much better sound. But, again, *I feel like you have to kinda manage your expectations, which if you want the open ear and then also great sound, like, you're kinda have to give something up because it's gonna mix with the ambient sound. But I would say that's probably the most important. It's the sound quality*. Because I really enjoy music. I feel like it really, you know, it can totally make or break your day. So *I wanna make sure that it sounds good and sounds like the artist intended*. I also want those people where if, like, a light's flickering or there's, like, a crackle or something, I get crazy. So little nuances like that will, like, send me over the edge. (Bose Ultra Open Earbuds user, 53y.o., Designer)



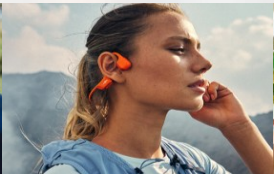
Significantly higher than other earphone type under 95% confidence level

N=633

of the following scenarios, which aspects are important to you when using open-ear earphones? [Multiple]

Bone conduction centers on sports and establishes a strong advantage in comfort, while ear-clip/ ear-hook designs expand open ear into daily usage, together lays the good foundation for development.

General Advantages Across Open-Ear Subtypes



Long-Lasting Comfort & Secure Fit



Situational Awareness

Scenario-Driven Emerging Needs

More of a daily used type of earphone



Appearance meets the needs of daily use

Top3 Categories of Use Cases:

Sporting 46%
Commuting 44%

Public places 38%

- Fit more naturally into everyday environments
- Office
 - Public transportation



Sound quality rivals that of standard daily used earphone

Top3 Categories of Use Cases:

Sporting 46%
Commuting 41%
Public places 32%

- A more immersive experience for
- Music
 - Movies

Prolonged wearing in sports

Long battery life

Top3 Categories of Use Cases:

Sporting 54%
Commuting 46%
Public places 37%

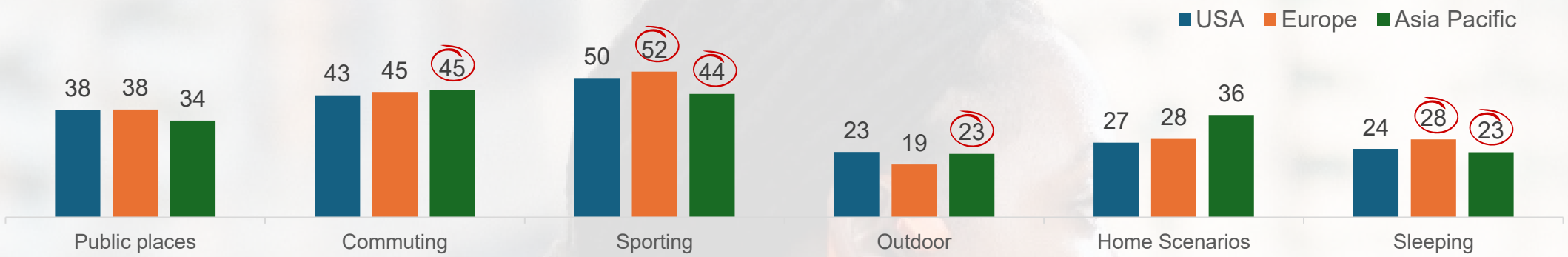
- Ensures reliable wear for extended periods away from home (e.g. battery life)
- Out for walk
 - Outdoor long-time exercise (outdoor running/cycling)

Development characteristics of different regions

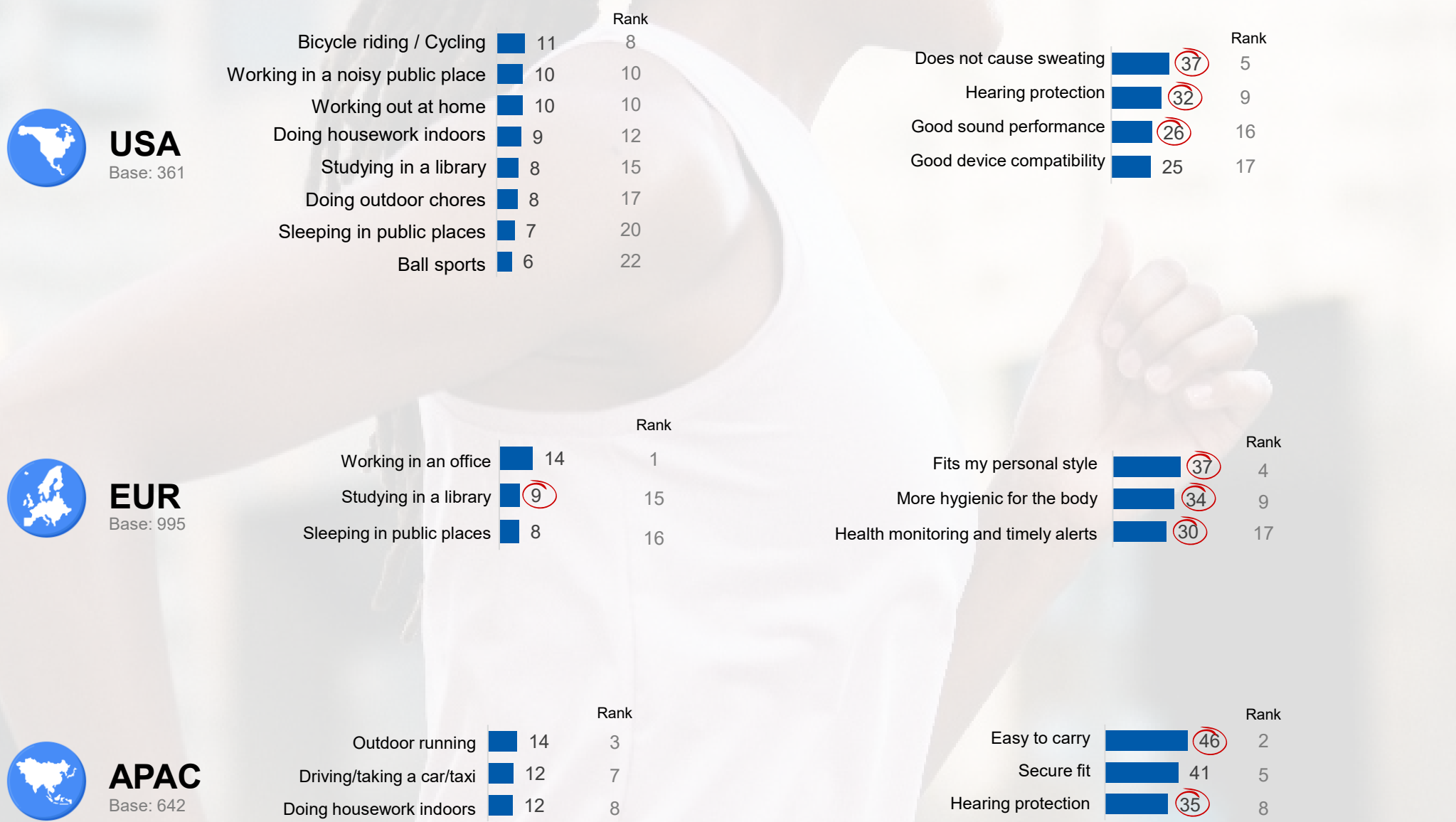
USA consumers use open ear in a wider range of scenarios with diverse needs; in Europe, open-ear are primarily used in daily prolonged wearing occasions; usage and needs in the APAC lean more towards mobile scenarios.

NIQ

Classifications of Usage Scenarios By Region (%) :



Specific Scenarios/Needs of Higher Ranking By Region (%):



Significantly higher than other earphone type under 95% confidence level

Each of the following scenarios: Which type of earphones/headphones do you typically use? [Multiple] / B7-2. In each of the following scenarios, which aspects are important to you when using open-ear earphones? [Multiple]

Region: USA (sampling within the continental United States); Europe (sampling in Germany, the UK, and France); APAC (sampling in South Korea and Japan).

A woman with dark hair tied back, wearing a white long-sleeved shirt and a light-colored cardigan, is shown in profile from the chest up. She is smiling and looking out of a large window with a wooden frame. In her right hand, she holds a brown paper coffee cup with a white lid. A semi-transparent rectangular overlay is positioned in front of her, containing the number '04' in large blue font and the text 'Brand Competition' in bold black font below it.

04

Brand Competition

As an industry pioneer, Shokz has long focused on open-ear headphones and boasts an extensive, comprehensive product lineup.

2011.~



Sports

 OpenRun Pro 2 Flagship	 OpenRun Pro	 OpenRun Standard
 OpenSwim Pro Bluetooth + MP3	 OpenSwim MP3 Player	 OpenMove Entry Level



Lifestyle

 OpenDots 2 Flagship	 OpenDots ONE Premium	 OpenDots Air Standard
 OpenFit Pro Flaship	 OpenFit 2 Series Premium	 OpenFit Air Standard



Communication

 OpenMeet 2 UC Flagship	 zoom Certified	 webex by CISCO
 OpenComm 2 UC Zoom Certified	 zoom Certified	

Through in-depth technical R&D, we continuously break through bottlenecks in open-ear design, establish advantages in sporting, reinforce the benefits of comfort, and refine audio quality.

Sound performance

Open-ear sound architecture



Through innovative acoustic driver architecture designed specifically for open-ear listening, Shokz delivers a more balanced and natural sound across the full frequency range while maintaining stable, reliable audio performance.



Sound leakage control technology

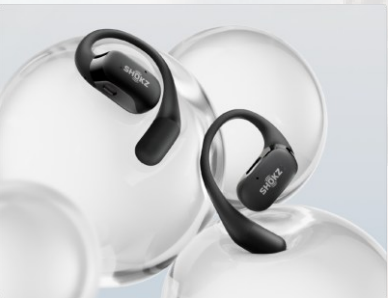
An intelligent audio algorithm adjusts in real time to your volume and surroundings, keeping balance and detail across every note.



Open-ear noise reduction

A three-mic system filters out surrounding noise for clearer sound.

Wearing Experience



Soft silicone material

To solve the discomfort of wearing earbuds for long periods of time, Shokz spent years developing our proprietary Ultra-Soft Silicone™ 2.0, delivering a more comfortable wearing experience.



Flexible nickel-titanium alloy

Shokz pioneered titanium alloy in open-ear headphones. Our proprietary nickel-titanium wire is light, durable, and holds its shape for a secure, comfortable fit.

Sporting



Waterproofing

Engineered to hold up through sweat, rain, and swimming.



Stability

Years of stability testing for a secure fit that holds in any condition.

A solid foundation for development and a leading industry **NIQ** position have been established.

Sharing value with the world

70+

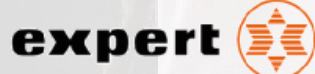
Countries

28,000+

Stores worldwide

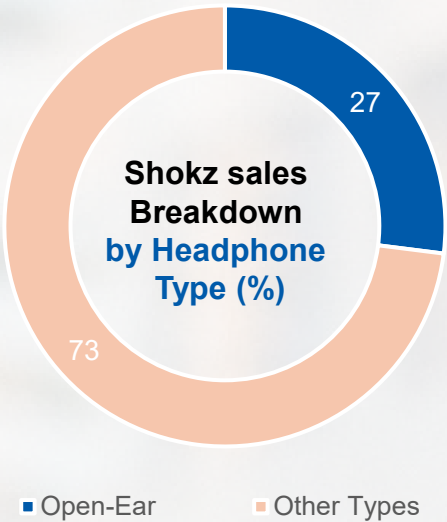
30,000,000+

Cumulative sales (units)

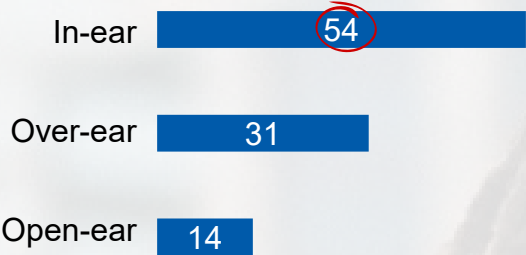


Shokz is currently in a phase of rapid growth, actively capturing users from the in-ear and over-ear headphone types mainly by its comfort.

- At the same time, excellent sound quality and a solid reputation have also contributed to sales growth.



Headphone Type Sources of Shokz New Users:



Shokz Purchase Priorities (%):



Reasons for Competitor Users Not Buying Previous Brand (%):

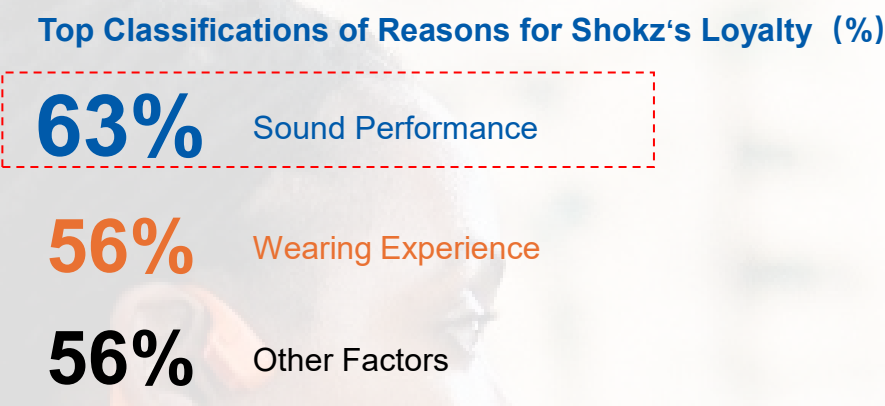
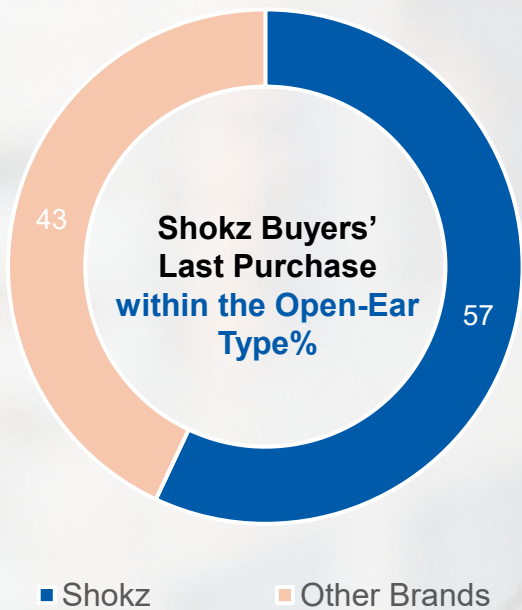
Classification	Factors
Type/Appearance	Wanted to try a different type16
Price	Not offer promotions15
Type/Appearance	Not competitive brand in wanted type11
Wearing experience	Feel hot or cause sweating11
Brand	poor after-sales service11
Type/Appearance	Lack of wanted type11
Wearing experience	Not fit securely11
Wearing experience	caused skin irritation10
Others	not water/sweat/dust resistant10
Brand	No celebrity/KOL recommendation10
Brand	Attracted by new brand ads10
Brand	Wanted to try a new brand10
Price	Too expensive10
Type/Appearance	unattractive appearance10

Competition analysis

NIQ

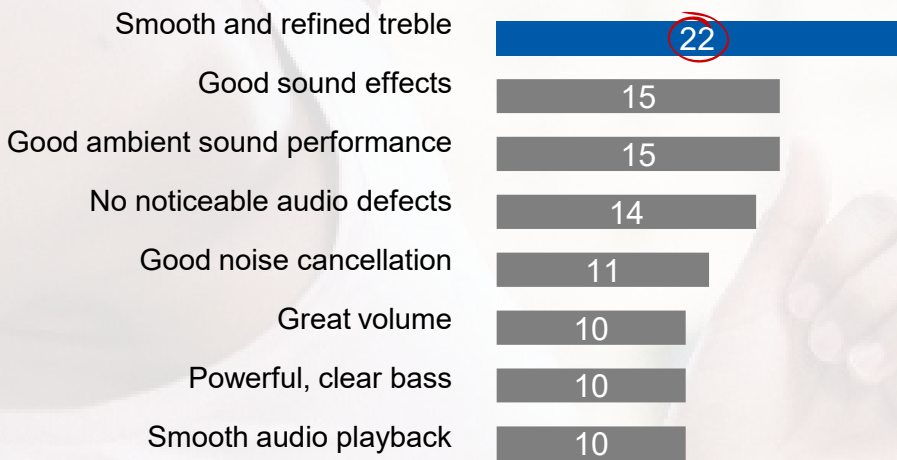
Within the open-ear type, Shokz enjoys exceptional brand loyalty because its products offer not only superior comfort but also outstanding sound quality, enabling them to meet a wide range of needs across various scenarios.

- At the same time, fundamental connectivity performance—along with water, dust, and sweat resistance—has significantly helped boost user loyalty to the brand.

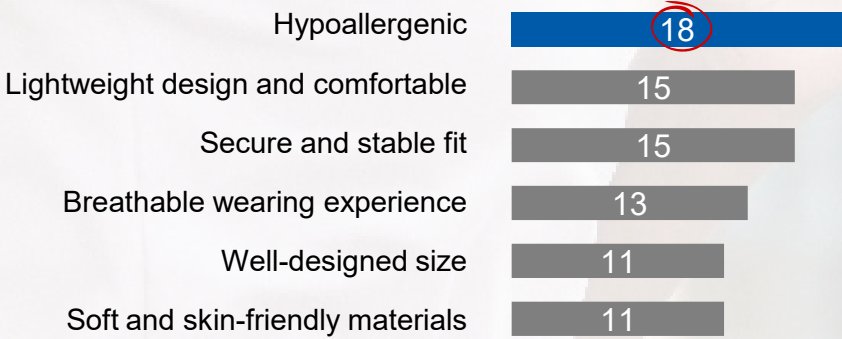


Top Reasons for Consumers Remain Loyal to Shokz (%)

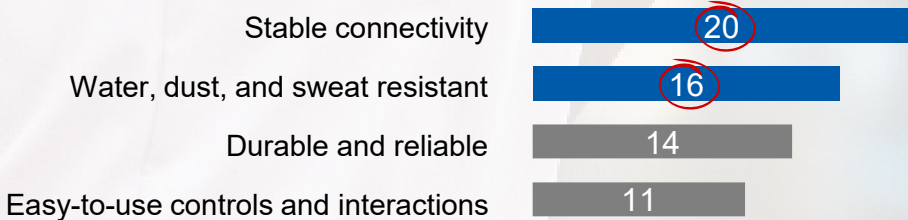
Sound Performance (63%)



Wearing Experience (56%)



Other Factors (56%)



Years of dedication to the open-ear category, coupled with a well-rounded and reliable user experience, have earned Shokz a strong reputation among consumers, strengthening both trust and brand image.

Category Pioneer

- Shokz is widely regarded as a pioneer in the open-ear headphone category, with a strong reputation for professionalism, category expertise, and product innovation.

*I would say I did like Shokz the most because I know that **they're like, the forefront of it and the first to do it**, so I kinda trusted them. (Shokz Open Fit 2 Plus user, 24y.o., Legal assistant)*

Well-Rounded Experience

- Across key dimensions such as comfort, sound quality, connectivity, and overall reliability, users perceive Shokz products as delivering a high-quality and well-balanced experience with few noticeable shortcomings. The strong reputation built through consistently positive user experiences has played a significant role in driving both purchase and repurchase behavior.

*I ultimately chose the Shokz OpenFit Pro 2 just because of all the reviews because my friend had this model, and I was able to borrow them for a workout. They have the highest quality that I was able to, you know, I was able to feel it in person and experience it in person as well as all of the other reviews and AI, Amazon reviews, narrowed it down to this model, and that's where I, you know, I narrowed it down to. Yeah. You kinda hit it on the nail right there. Comfort, sound quality, and battery length. Those are the three big ones. **And just the reviews and quality reviews that people had said they were quality products, and they've been making quality products for a while now.** Those are the three big factors... And **one that I would trust more than anything would be Shokz because I have personal experience now. I have them, and they work well, and they're just great.** They are very comfortable. I'd rarely have stability issues. They did they rarely disconnect or lose connection. Sound performance is great when I'm watching television and movies, so it's just top tier. (Shokz Open Fit Pro + Shokz OpenMove + Soundcore AeroFit 2 user, 51y.o., Quality consultant)*

I prefer Shokz, honestly. When I heard of them the first time, I wouldn't have thought that much, but they've turned out to be very good. I've had the bone conduction ones for four or five years, and they still work. So until Shokz, unless Shokz goes vastly down in quality, I will continue to buy them. (Shokz Open Fit 2 user, 54y.o., Customer Service Representative)

Shokz continuously breaks through technological barriers in the open-ear and has built an extensive product lineup, capturing and retaining user loyalty through superior overall performance.



Continuously expand industry boundaries

Expanding the Boundaries of Sports

- Waterproofing
- Stability

Shokz Sports Lineup:

OpenRun Pro 2	OpenSwim Pro
OpenRun Pro	OpenSwim
OpenRun	OpenMove

Expanding the Boundaries of Comfort

- Soft silicone material
- Flexible nickel-titanium alloy

Shokz Lifestyle Lineup:

OpenDots 2	OpenFit Pro
OpenDots ONE	OpenFit 2 Series
OpenDots Air	OpenFit Air

Expanding the Boundaries of Sound Quality

- Open-ear sound architecture
- Open-ear noise reduction
- Sound leakage control technology

Shokz Communication Lineup:

OpenMeet 2 UC
OpenComm 2 UC



Possess a combined advantage of wearing experience, sound quality, and durability. Capturing users through comfort while solidifying loyalty with high-quality audio performance.

Shokz purchase priorities:



Significantly higher than other earphone type under 95% confidence level

A woman with dark hair in a ponytail, wearing a white long-sleeved shirt and a light-colored cardigan, is looking out a large window. She is holding a brown paper coffee cup with a white lid. The window has a wooden frame and shows a blurred view of trees outside. A semi-transparent white rectangle is overlaid on the image, containing the text '05' and 'Future Outlook'.

05

Future Outlook

By 2026, the global headphone market is undergoing a transformation from traditional "auxiliary audio devices" to "AI smart terminals" connected to Large Language Models (LLMs).

01 EDGE ACOUSTIC INTELLIGENCE

On-device, low-latency, always-on. Becoming table stakes in premium 2026 SKUs.

MAINSTREAM

Neural Speech Enhancement

Isolates wearer speech from wind, traffic and competing talkers via mic arrays plus bone-conduction / VPU fusion.

PRODUCT EXAMPLES

Soundcore Liberty 5 Pro/Max; Sony WF-1000XM6; Galaxy Buds4; JBL Live 4; Huawei FreeBuds Pro 4

MAINSTREAM

Neural Speech Enhancement

Estimates fit, leakage and scene noise continuously, then retunes cancellation or transparency — not a fixed ANC preset.

PRODUCT EXAMPLES

Galaxy Buds4 Pro; AirPods Max 2; Liberty 5 Pro; EarFun Wave Pro X; JBL Live; Pixel Buds Pro 2

DIFFERENTIATING

Personalization & Restoration

Learns hearing response and listening preference; rebuilds EQ and restores detail lost to compression or packet loss.

PRODUCT EXAMPLES

AirPods Max 2 Personalized Volume; Soundcore HearID 5.0; Galaxy adaptive EQ; Bose CustomTune

PREMIUM

Context & Safety Listening

Detects wearer speech, conversation, sirens and loud transients; auto-ducks media or passes hazard cues through.

PRODUCT EXAMPLES

Galaxy Voice Detect / Siren Detect; Apple Conversation Awareness; Loud Sound Reduction; Bose ActiveSense

02 SEMANTIC / COGNITIVE AI

Buyer-facing “AI earbud” features. Execution is usually hybrid: earbud captures, phone/cloud interprets.

FAST-GROWING

Real-Time Translation

Streaming ASR + neural translation + in-ear or case-display delivery. Large models typically run off the earbud.

PRODUCT EXAMPLES

AirPods Max 2 Live Translation; EarFun Clip 2; Timekettle WT4 Edge Pro; Liberty 5 Pro

MAINSTREAM

Conversational Agents

Headset as a low-friction front end for multi-turn agents. Local commands stay on-device; generative reasoning usually does not.

PRODUCT EXAMPLES

Galaxy Buds4 (Gemini / Bixby / Perplexity) ; Apple Siri; Soundcore Anka

EMERGING

Meeting Intelligence

Captures meetings or voice notes (often in the case), then transcribes, identifies speakers and extracts summaries / tasks.

PRODUCT EXAMPLES

Liberty 5 Pro Max; iFLYTEK; TECNO POVA AI Buds Pro · Nothing Ear(3a) Audio Snapshot

SCALING

Gesture & Invisible UI

Head nod / shake is shipping at scale. Jaw, blink and cheek microgestures are the next voice-free control layer.

PRODUCT EXAMPLES

Galaxy Buds4 Pro; AirPods Max 2; Pixel Buds Pro 2 · Huawei FreeBuds Pro 4; Naqi Neural Earbuds

03 FRONTIER BETS

Low prevalence, high option value. Requires new sensors, regulation, privacy design — or a different product thesis.

REGULATED

AI Hearing Assistance

Streaming ASR + neural translation + in-ear or case-display delivery. Large models typically run off the earbud.

PRODUCT EXAMPLES

Samsung Galaxy Buds4 Pro / Buds3 Pro Hearing Aid ·

EARLY

Neuroadaptive / EEG

In-ear EEG infers sleep depth, engagement or cognitive readiness and can close the loop by adapting audio.

PRODUCT EXAMPLES

NextSense Smartbuds

NEW UX

Near-Silent Voice Input

Captures below-whisper speech so users can dictate or talk to an agent without being heard by the room.

PRODUCT EXAMPLES

Subtle Voicebuds U.S. beta

CONCEPT

Multimodal Visual + Audio

First-person cameras plus mics let an on-head agent reason about objects, text, documents and scene context.

As a headphone type that attracts a younger user base, offers greater interactivity, and is worn for longer periods, open-ear possess unique advantages in the field of AI.

Open-ear possesses more Gen-Z users, which is also the first AI-native generation.

- **AI has already become a core part of Gen Z's digital lives:** AI adoption is now mainstream among younger consumers. Studies show that 74% of Gen Z have used AI at least once, up significantly from 57% a year ago.
- **Gen Z is embedding it into learning, work, and information discovery:** Beyond experimentation and entertainment, 61% of Gen Z use AI for education and learning-related tasks, 52% leverage AI to enhance productivity at work, and 65% use AI as an alternative to traditional search methods.

Open-ear has better capability to realize AI-driven hands-free interaction.

- **Accurate voice capture enhances AI understanding:** AI experiences rely heavily on high-quality voice input. In noisy environments such as commuting, outdoor activities, or public spaces, open-ear headphones can leverage advanced voice pickup and noise reduction technologies to better separate user speech from background noise, enabling AI to understand user intent more accurately and improving experiences such as voice assistants, real-time translation, and meeting transcription.
- **Continuous interaction unlocks long-context AI:** The value of AI assistants extends beyond single-turn interactions to continuous understanding of user behavior, task progress, and ongoing conversations. With their comfortable all-day wearability, open-ear headphones enable AI to maintain context over extended periods, supporting more accurate meeting summaries, task management, and personalized assistance through richer contextual understanding.

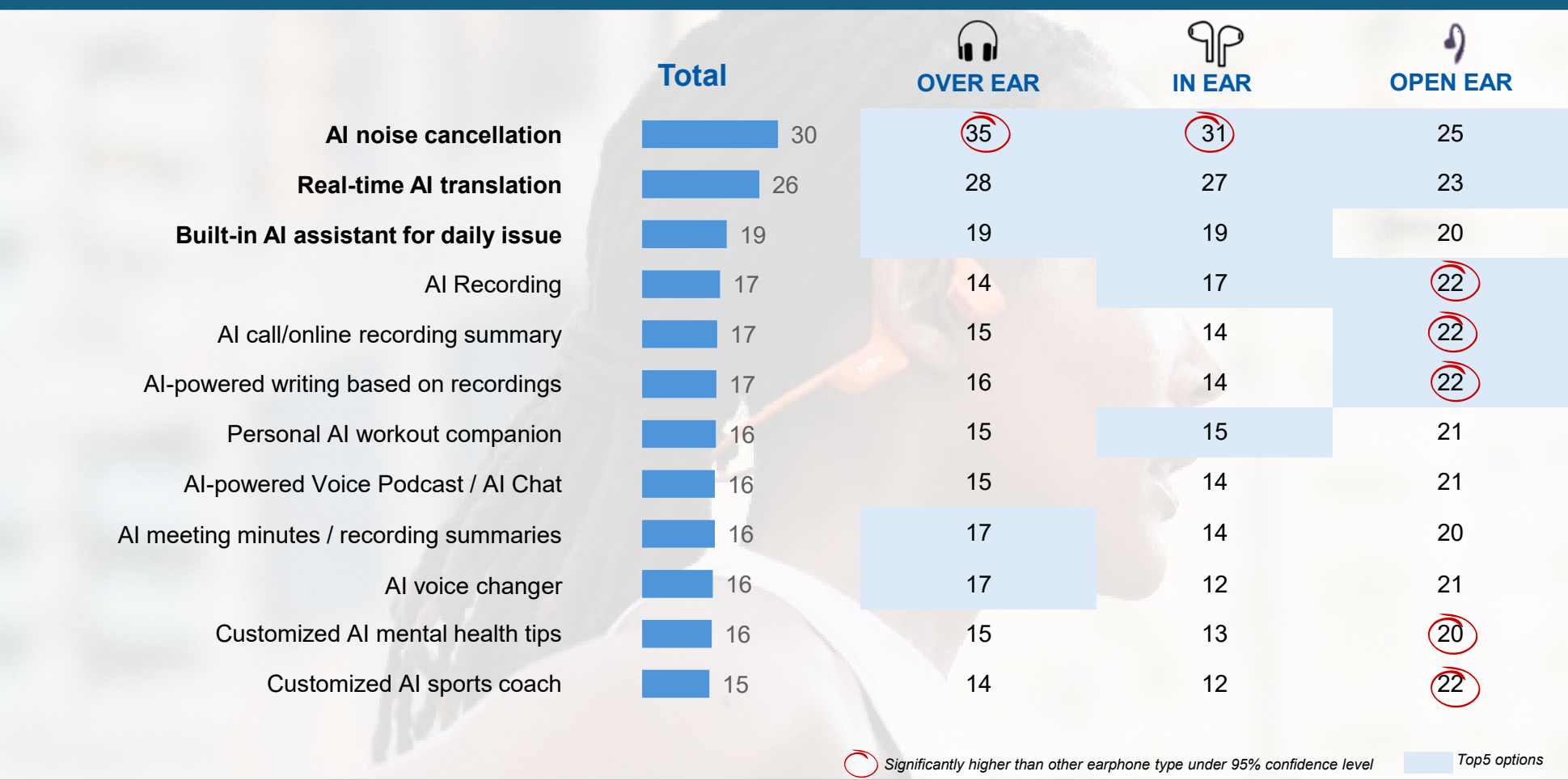
All-Day wearability of open-ear enables Always-On AI.

- **Always accessible and ready to respond:** The value of AI assistants depends on continuous availability rather than occasional interactions. Open-ear headphones are designed for extended use across work, study, commuting, and fitness scenarios.
- **Instant availability captures critical moments:** Many AI use cases emerge unexpectedly throughout the day. By remaining comfortably wearable during daily activities, open-ear headphones keep AI within immediate reach, allowing timely assistance in scenarios such as meeting support, real-time translation, and navigation.
- **Low-intrusion experience supports Ambient AI:** The future of AI is not constant active usage, but seamless integration into everyday life. Open-ear headphones balance digital assistance with awareness of the surrounding environment, creating a low-intrusion experience that aligns closely with the vision of ambient and companion AI.

Open-ear users expect AI to actively integrate into their daily workflows, meetings and physical activities, rather than simply manage the environmental noise.

- Overall, consumers' expectations for AI features are increasingly centered on daily practical functions (such as AI noise reduction/real-time translation/built-in AI assistant).
- Open-ear users show uniquely high expectations for advanced utility, like AI recording, call summaries, and AI-powered writing functionalities. Additionally, fitness-oriented AI features get more desires noticeably exceeding other types.

The Expectation for AI features (%)



AI noise cancellation: Automatically Adjusts Audio Settings to the Environment

I sometimes still hear too much of my surroundings and can't concentrate on my audiobook, so I sometimes have to listen to it again. I wish the noise cancellation was just, well, better, and that I wouldn't have to turn up the volume on my headphones, since that's unfortunately bad for your ears again. (Bose Ultra Open Earbuds user, 41y.o., Accountant)

AI recording & call summaries: A Personal Life & Productivity Assistant

For me, the two biggest things that I would like is meeting transcription and meeting summarization. I could use those. If my AI earbuds or open earbuds could do that while I'm having a meeting, I could focus on the meeting and be more involved. And also real-time translation. Sometimes I meet with different languages in meetings like Chinese. If I could have that, that would just be great. I would love for there to be a feature where I could be having a meeting with someone, and I don't wanna use a bot. I just want it to be where we're on a phone. It trans it's it's listening, taking notes for me, transcribes it, and then sends me a summary recap. (Shokz Open Fit Pro + Shokz OpenMove + Soundcore AeroFit 2 user, 51y.o., Quality consultant)

AI workout companion: A Personal Fitness Coach

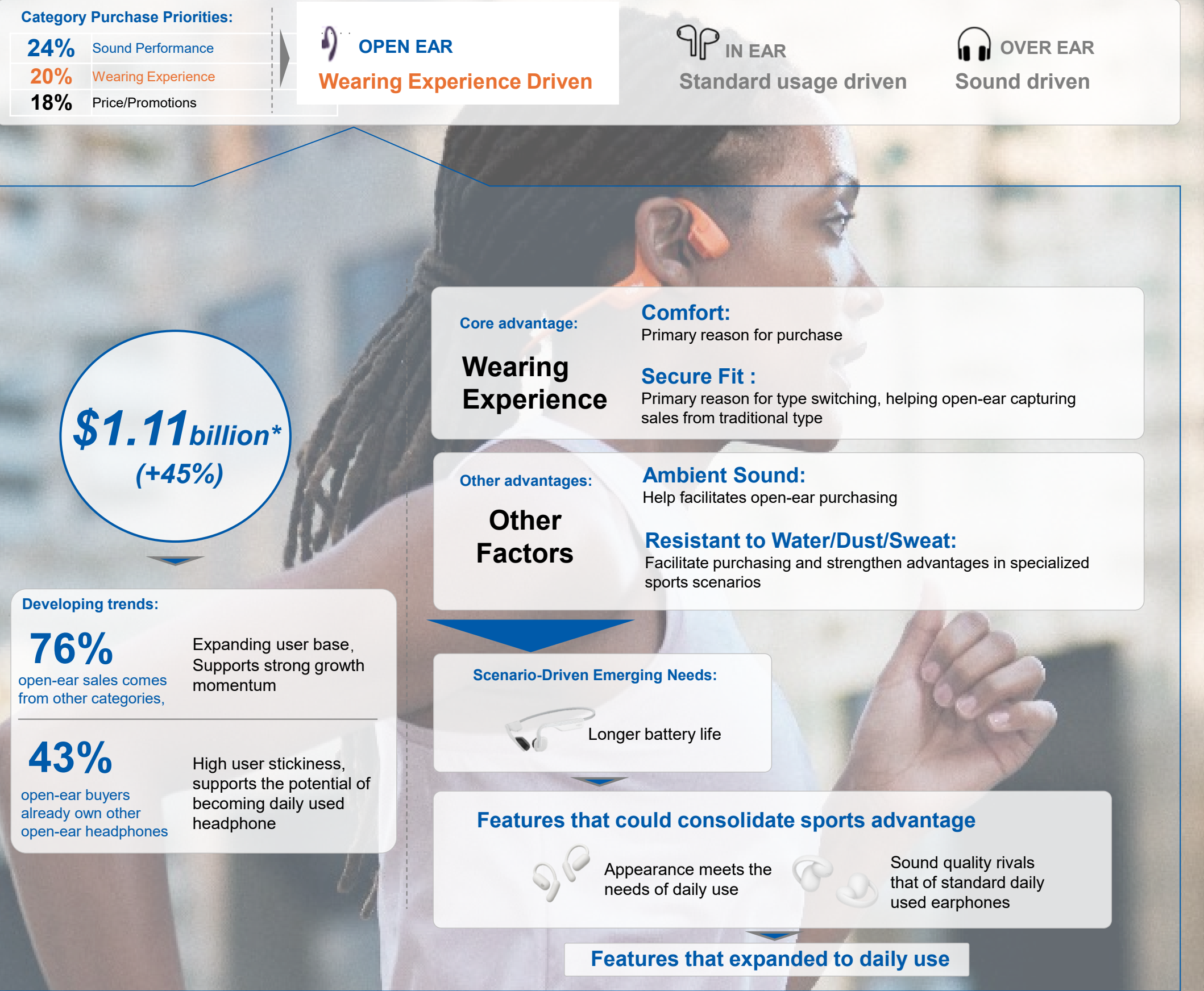
It can connect to various sports apps such as Adidas Running. When paired with these platforms, the headset can work with personalized virtual training coach services for coordinated use, which I believe would be fantastic. Meanwhile, it can motivate users to keep exercising and maintain activity habits. (Soundcore AeroFit user, 43y.o., Key Account Manager)

A woman with dark hair in a ponytail, wearing a white long-sleeved shirt and a light-colored cardigan, is shown in profile. She is smiling and looking out of a large window with a wooden frame. She is holding a brown paper coffee cup with a white lid. The background outside the window is a blurred view of trees and foliage.

06

Report Summary

As a rapidly growing category, open-ear are carving out a market niche through their distinct advantages—comfort and a secure fit—and possess the potential to become a daily used headphone that integrates deeply into consumers' daily lives.



Looking forward, open-ear is poised to gradually evolve into everyday audio device, driven by consumers with greater purchasing potential, and to lead the category' s transformation from mere listening tool into technological companion.



Consumer Aspect:

High Purchasing Power



- Skew towards Gen Z
- White-collar and professionals
- Upper-middle income
- Tech enthusiast

Future Outlook :

Higher potential to spend more on tech products including headphones due to following reasons:

- Enthusiasm for tech
- Growing income
- More repeat purchases due to longer product usage cycles driven by younger consumer demographic



Scenario Aspect:

Wider Scenario Coverage



- Sporting is a core advantage
- Higher usage in public places (prolonged wearing & away from home)
- Also see significant usage in headphone category core commuting scenario

Future Outlook :

Expansion from sports settings to everyday scenarios due to the development of following sub-types:

- Ear-hook: Supports more use away from home
- Ear-clip: Covers wider range of scenarios



Technical Aspect:

Potential to Understands You Better



- Best suited for AI development (prolonged wearing/ younger demographic/better interaction)
- Higher & more diversified expectations on AI

Future Outlook :

Embracing AI to transform from hearing accessory into all day tech companion:

- Daily Assistant : Translation/recording/daily assistant
- Workout Companion: Health monitoring / workout coaching
- AI Noise Cancellation



Thank you

2026.

Research Criteria

Quantitative Research

- ◆ **Methodology:** Online questionnaire survey (LOI=25mins)
- ◆ **Sample:** 5163 in total
- ◆ **Coverage:** USA/UK/France/Germany/Japan/South Korea

Sample Criteria:

- ◆ Age: 18–60 years old, distribution aligns with market
- ◆ Gender: 50% male, 50% female (allows for fluctuation)
- ◆ Local resident for at least 1 year
- ◆ Current decision-maker for and sole user of the headphones; has used the headphones for at least 2 weeks
- ◆ Meets industry-specific exclusion criteria
- ◆ Has not participated in any headphone-related research in the past 3 months
- ◆ Headphone types: Wireless/wired in-ear or semi-in-ear; wireless/wired open-ear; wireless/wired over-ear
- ◆ Covers various usage scenarios, including but not limited to: sports, office work, napping, commuting/travel, etc.
- ◆ The distribution of headphone type, price segments, and brands aligns with current market conditions.

FW:

- ◆ 2026.7.-2026.8.

Qualitative Research

- ◆ **Methodology & Sample Size:**
AI Ethnography (N=20; Lol=30min); Online IDI (N=6; Lol=120min)
- ◆ **Coverage:** USA/Germany

- ◆ Age: 18–55 y.o. (even distribution); Must cover 50-55 y.o. in AI Ethno & IDI
- ◆ Gender: Equal coverage of males and females. Nice to have Male:Female=1:1
- ◆ Occupation: Cover various occupations, such as student, office worker, private business owner & freelancer, housewives
- ◆ Living in the research city for at least 1 year
- ◆ Education: College and above
- ◆ Have not participated in any earphone-related research in P6M; and have not participated in any research study on any topic in P3M
- ◆ No family members, relatives or close friends working in MR/Tech device industries
- ◆ Eloquent respondents with their own views, and open to chatting with strangers
- ◆ Purchased open-ear earphones within the past 12M (P3M is preferred), cover 3 different types evenly:
 - Bone conduction: ≥2 respondents per country
 - Ear-clip: ≥2 respondents per country
 - Ear-hook: ≥2 respondents per country
- ◆ Must be primary decision-maker and the main user; Second-hand earphones are exclusive
- ◆ Price: USD 30–300, skewed to middle price range
 - Low: \$30–99. 1–2 respondents per country
 - Mid-low: \$100–149. 3–4 respondents per country
 - Mid-high: \$150–199. 3–4 respondents per country
 - High: \$200+. 1–2 respondents per country
- ◆ Brand: Must cover a mix of key players in the market, e.g., Shokz (Must have), Soundcore (Must have), Bose, Sony, JBL, Nothing, Philips; Cover Apple In-ear user (in use, or replaced and left idle)
- ◆ Cover a diverse range of usage scenarios, including:
 - Outdoor sports (cycling, running, hiking)
 - Gym / fitness
 - Commuting
 - Work / business use
 - Entertainment (e.g., watching video at home)
- ◆ Prefer respondent who owns more types of earphones (Open, In-ear, Overhead)
- ◆ Prefer respondent who has diverse Open earphones usage scenario
- ◆ Cover Open earphone First-time buyer (transferred from In-ear, Overhead)

FW:

- ◆ 2026.7.-2026.8.