

Growth Opportunities in the Global Professional Headset Market—Forecast to 2028

**Professional Headsets
Continue to Increase in
Penetration Among the
New World of Hybrid
Workers**

**Global Information &
Communications Technologies
Research Team at Frost & Sullivan**

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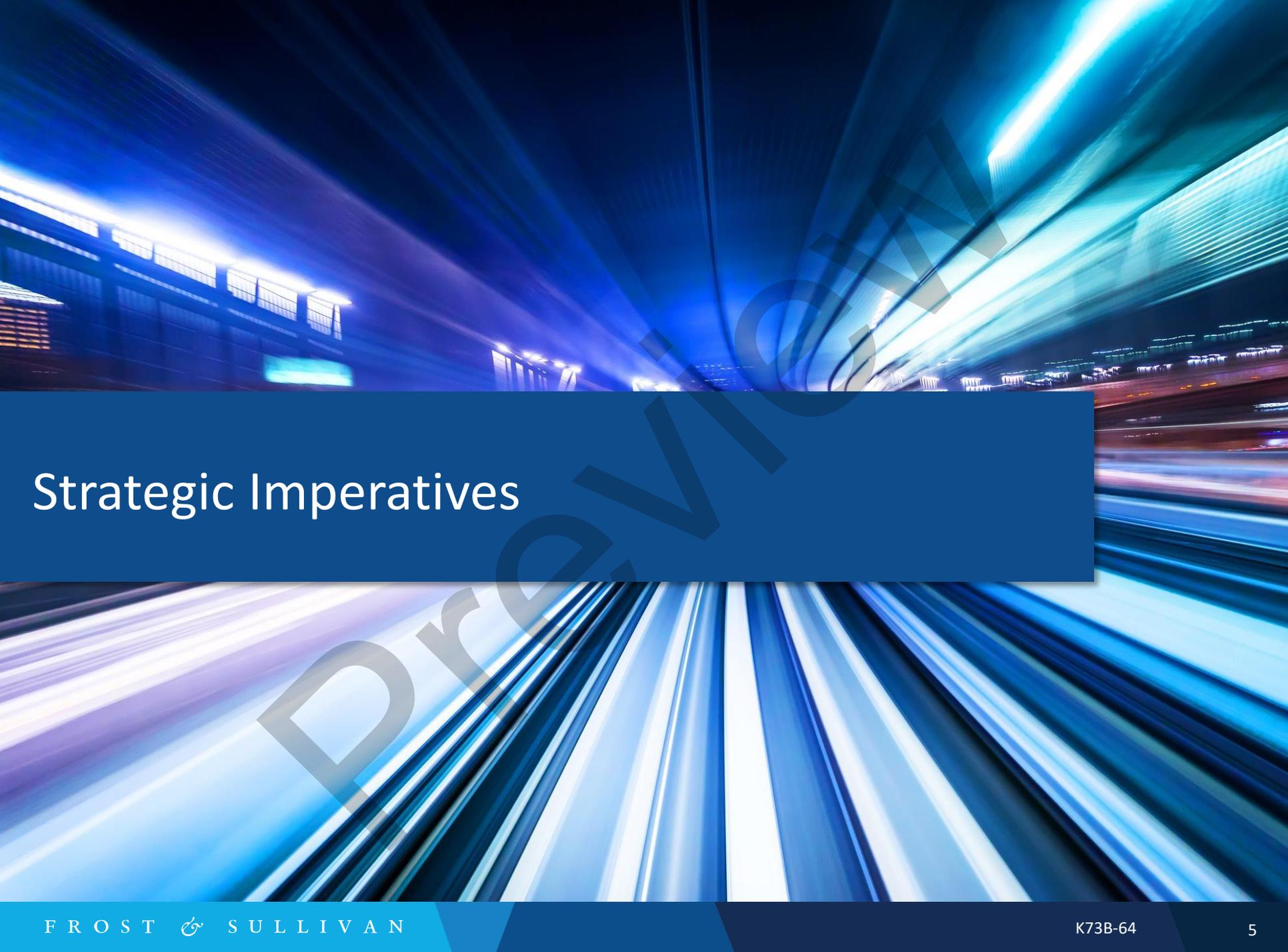
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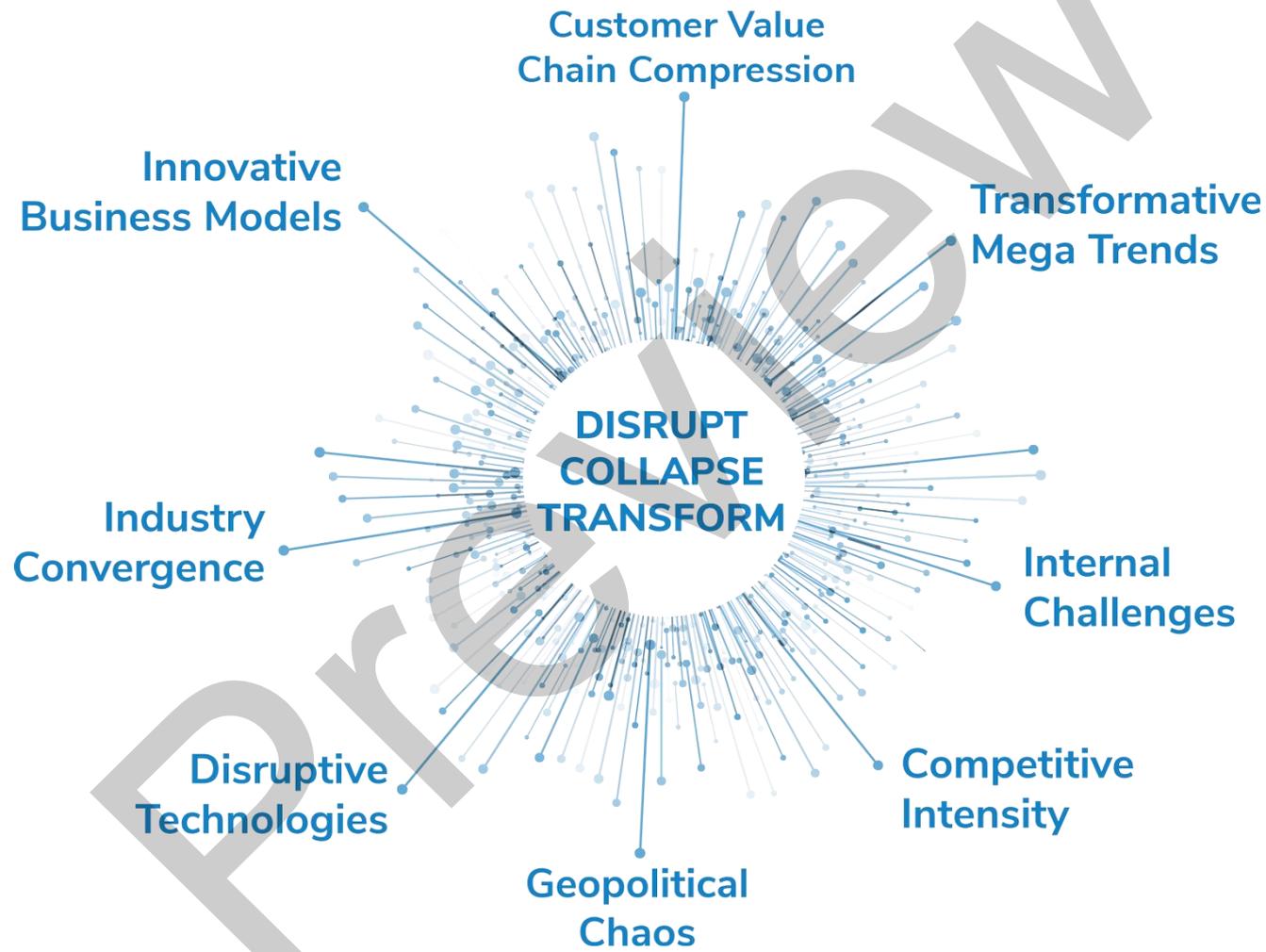
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Strategic Imperatives

Why is it Increasingly Difficult to Grow?

The Strategic Imperative 8™: Factors Creating Pressure on Growth



Source: Frost & Sullivan

The Strategic Imperative 8™

Innovative Business Models

A new revenue model that defines how a company creates and capitalizes economic value, typically impacting its value proposition, product offering, operational strategies, and brand positioning

Customer Value Chain Compression

Customer value chain compression as a result of advanced technologies, internet platforms, and other direct-to-consumer models that enables reduction in friction and the number of steps in customer journeys

Transformative Mega Trends

Global forces that define the future world with their far-reaching impact on business, societies, economies, cultures, and personal lives

Internal Challenges

The internal organizational behaviors that prevent a company from making required changes

Competitive Intensity

A new wave of competition from start-ups and digital business models that challenge the standing conventions of the past, compelling established industries to re-think their competitive stance

Geopolitical Chaos

Chaos and disorder arising from political discord, natural calamities, pandemics, and social unrest that impact global trade, collaboration, and business security

Disruptive Technologies

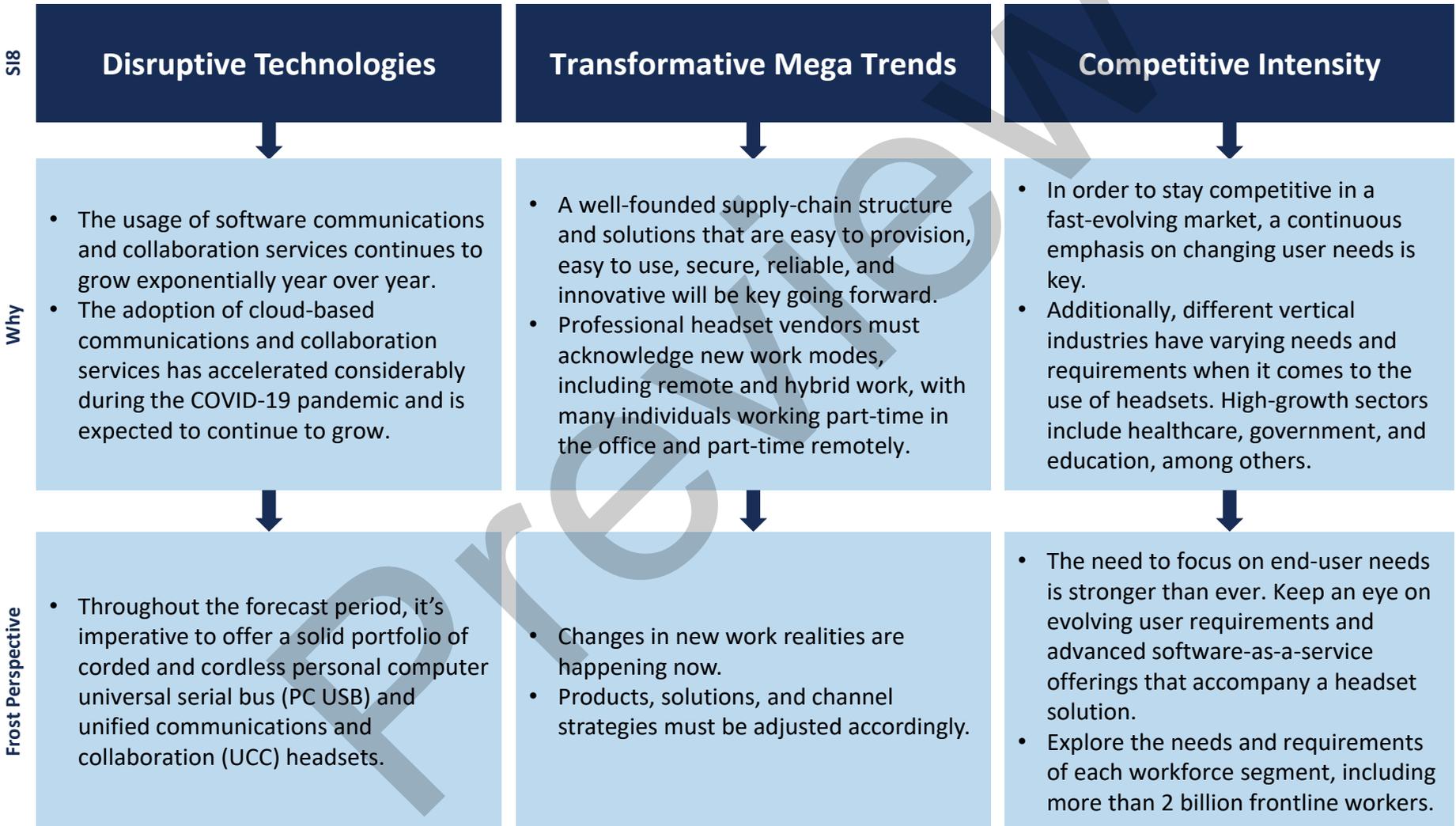
New, disruptive technologies that are displacing the old, and significantly altering the way consumers, industries, or businesses operate

Industry Convergence

Collaboration between previously disparate industries to deliver on whitespace cross-industry growth opportunities

Source: Frost & Sullivan

The Impact of the Top 3 Strategic Imperatives on the Professional Headset Industry

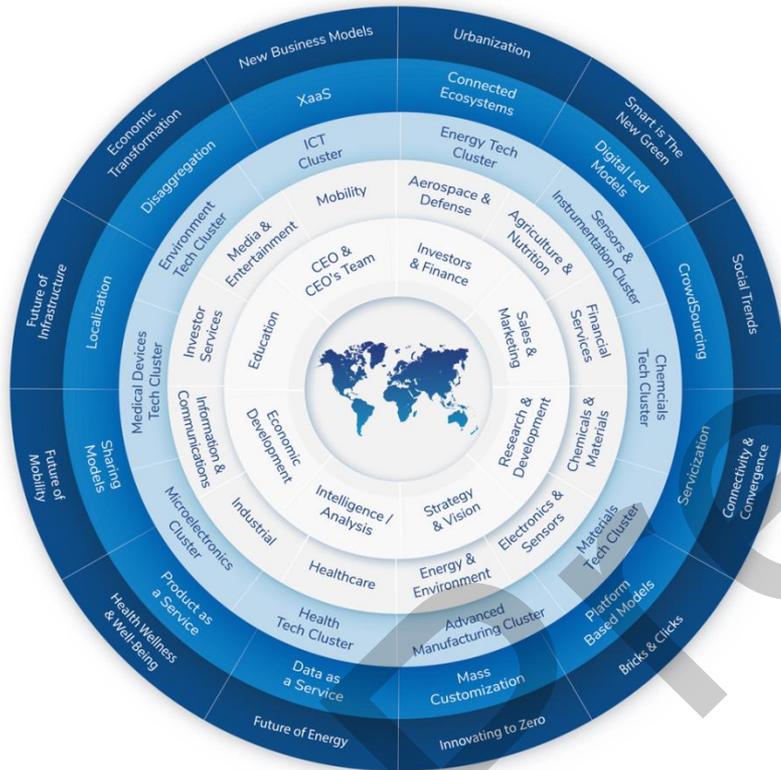


Source: Frost & Sullivan

Growth Opportunities Fuel the Growth Pipeline Engine™



The Innovation Generator™



Analytical Perspectives



The Growth Pipeline Engine™



Source: Frost & Sullivan

Growth Opportunity Analysis

Scope of Analysis

- This research service analyzes the global professional headset market.
- Professional headsets include corded and cordless headsets that are used in conjunction with enterprise communications endpoints integrated with the rest of the enterprise communications infrastructure (premises-based or hosted/cloud-based call control and conferencing systems).
- Shipments are based on units of headset tops.
- Revenue includes headsets plus related infrastructure such as amplifiers, direct connect cables, digital adapters, charging base stations, lifters, headset software and other headset accessories.
- Revenue represents manufacturers' sales of professional headsets to service providers, distributors, retailers, resellers, original equipment manufacturer (OEM) partners, and other distribution channels, as well as direct sales to enterprise customers.
- Primary and secondary information, in conjunction with internal information databases, has been used to analyze the market and provide the observations and conclusions in this study.
- Any previous-year(s) market-size and market-share estimates, if revised, are updated in this study.

Scope	
Geographic Coverage	Global
Study Period	2019–2028
Base Year	2021
Forecast Period	2022–2028
Forecasted Regions	North America, Europe, Middle East and Africa (EMEA), Asia Pacific (APAC), and Latin America
Monetary Unit	US Dollars

Source: Frost & Sullivan

Market Definitions

PC USB and UCC Headsets

Corded headsets are the most common type of professional headsets. They connect to business phones through amplifiers or Direct Connect Quick Disconnect (bottom) cables. Typically, the Direct Connect cable plugs into either a handset port (RJ9/RJ10/RJ22), a dedicated modular headset port or a 2.5 mm headset jack located on the side of the endpoint. USB corded headsets (PC USB corded headsets), on the other hand, connect to PCs and certain types of Internet Protocol (IP) desktop phones for IP communications. The study does not include general consumer-grade headsets with 3.5 mm headset jacks.

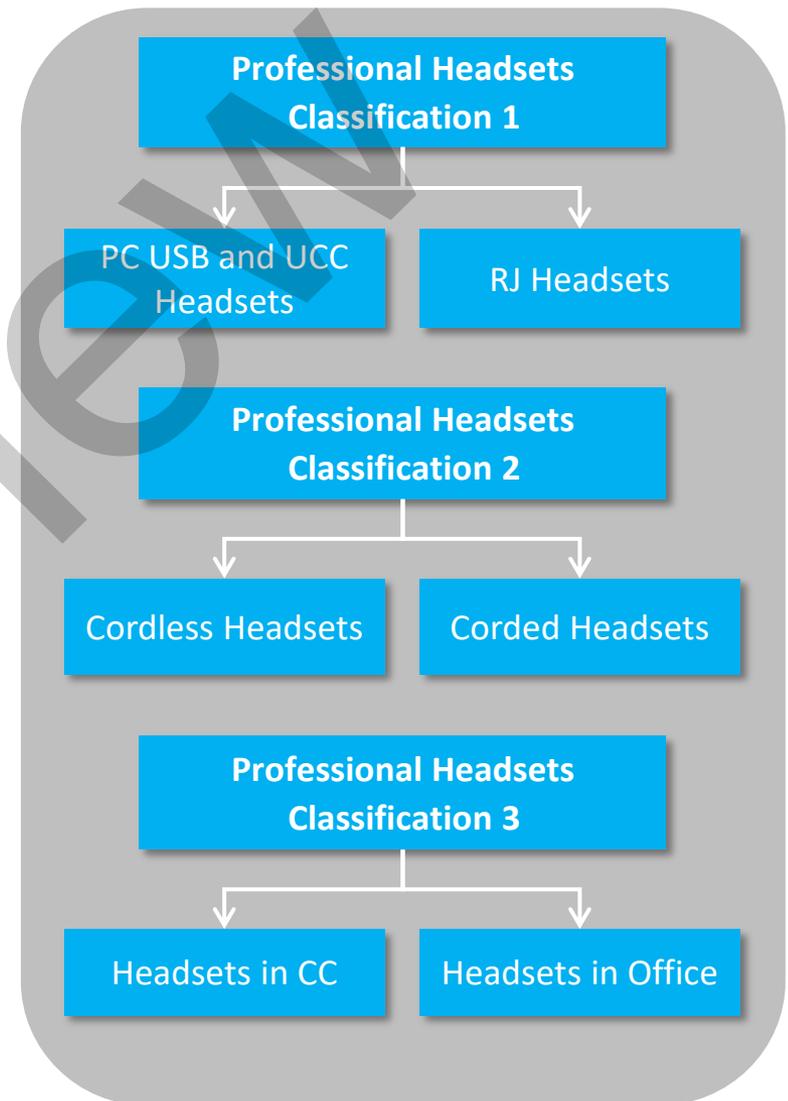
Cordless Headsets (Wireless)

Certain cordless headsets connect to a business phone or a PC via a base station that connects through either a handset port, a modular headset port, or a USB port in the PC or desktop phone (PC USB cordless headset). Using either Bluetooth wireless or DECT radio technology, the headset can transmit up to a 300-foot range (between base station and headset). Other cordless headsets connect to mobile devices via Bluetooth and to a PC via a USB dongle.

Source: Frost & Sullivan

Segmentation

- Frost & Sullivan classifies the professional headset market in three different ways, including PC USB and UCC headsets versus RJ headsets; cordless headsets versus corded headsets; and headsets used in contact centers versus headsets used in offices. These three distinct classifications should not be considered additive (Classification 1 + Classification 2 + Classification 3 does not equal the total size of the market). However, categories inside each classification do add up to the total professional headset market size (e.g. cordless headsets + corded headsets equals total market size).
- Unit shipment and revenue forecasts are provided for each one of these six different headset categories, in addition to a total professional headset unit shipment and revenue forecast.
- In addition to the forecast data, this study also provides specific 2020 and 2021 market sizing data per professional headset sub-category; wearing style; global regions; active noise cancelling capabilities; and per professional headset vendor (vendor revenue market shares).



Source: Frost & Sullivan

Growth Drivers

Professional Headset Market: Growth Drivers, Global, 2022–2028

Driver	1–2 Years	3–4 Years	5–7 Years
Continued growth of software-based business communications and collaboration services is the main growth driver in the professional headset market.	High	High	High
The pandemic has reinforced the paradigm shift toward “work from anywhere” or hybrid/flexible working, with new usage scenarios proliferating in various industries, including healthcare, education, and government, creating long-term opportunities for professional headsets.	High	High	High
Demand for wireless connectivity, in general, continues to grow along with technology improvements in wireless products, expanding the overall opportunity for professional cordless headset sales.	High	High	High
Innovation in headset features and capabilities, including advanced noise-cancelling technologies, connectivity improvements, and newer form factors enhances the appeal of professional headsets.	Medium	Medium	Medium
More businesses are aware of the expanding capabilities and considerable benefits of advanced professional headsets in terms of audio quality, noise attenuation, mobility, and overall comfort, and their direct impact on user performance.	Medium	Medium	Medium
Agent empowerment will continue to drive demand for more advanced professional headsets in the contact center space.	Medium	Low	Low
Continued improvements in device-as-a-service (DaaS) subscription models, enhancements of software-as-a-service (SaaS) offerings and accelerated adoption of these models bode well for overall professional headset revenue.	Low	Low	Low

Source: Frost & Sullivan

Growth Restraints

Professional Headset Market: Growth Restraints, Global, 2022–2028

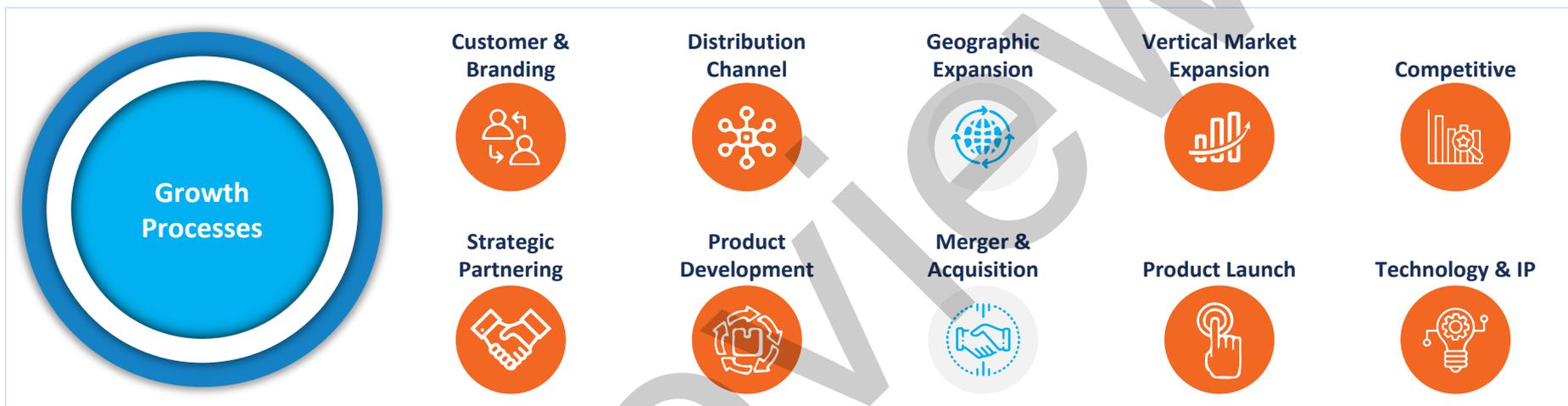
Restraint	1–2 Years	3–4 Years	5–7 Years
Declining usage of desktop phones continues to contribute to decreased sales of RJ connectivity-only professional headsets.	High	High	High
Consumer-grade headset alternatives continue to be purchased by users and businesses alike for work purposes, curtailing the overall market opportunity for professional-grade headsets.	High	High	High
Headset component shortages due to various factors, including pandemic-related work stoppages, growing demand, and challenging transportation logistics affect professional headset sales.	High	Medium	Low
High cost of advanced professional headsets restricts sales among more cost-conscious customers.	Medium	Medium	Medium
High contact center headset penetration, coupled with the refurbishment of Quick Disconnect (QD) headsets with digital adapters and USB connectors/enablers limits the overall growth opportunities for full-fledged PC USB and UCC professional headsets in the contact centers.	Medium	Medium	Medium
Evolution of technology (e.g., Bluetooth in laptops with full call control support, superior noise cancelling tech in cloud meetings platforms) are forcing vendors to continuously reinvigorate the value proposition behind their professional headsets.	Medium	Medium	Medium
Protracted Ukraine-Russia war is expected to negatively impact global and regional gross domestic products (GDPs) affecting demand of telecommunications products such as professional headsets.	Medium	Low	Low

Source: Frost & Sullivan

Growth Opportunity Universe

Growth Opportunity 1: Hybrid Work is the New Work

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.



Opp. Size in 5 Years	>\$1 B	Relevant Industries for this Growth Opportunity			Applicable Regions	
Timeline for Action	2 Years	Sole Proprietor	Public Sector	CXO	North America	Western Europe
		Micro Business/Org	Healthcare	Knowledge Worker	Latin America	Africa
		Small Business/Org	Financial Services	Back Office		
Base Year	2022	Mid Business/Org	Retail	Customer Service	Central/Eastern Europe	Asia-Pacific
		Large Business/Org	Manufacturing	Field/Frontline Worker		
		MNC Business/Org	Education	Mobile/Remote Worker		

Source: Frost & Sullivan

Growth Opportunity 2: Bluetooth PC USB and UCC Headset Sales Continue to Increase

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.

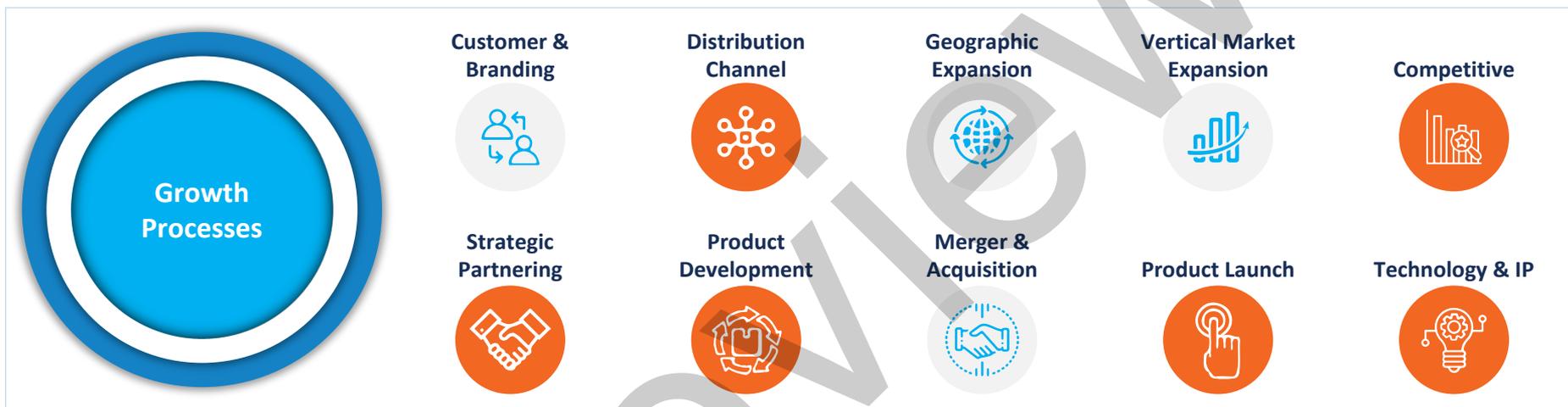


Opp. Size in 5 Years	>\$1 B	Relevant Industries for this Growth Opportunity			Applicable Regions	
Timeline for Action	Up to 7 Years	Sole Proprietor	Public Sector	CXO	North America	Western Europe
		Micro Business/Org	Healthcare	Knowledge Worker	Latin America	Africa
		Small Business/Org	Financial Services	Back Office		
Base Year	2022	Mid Business/Org	Retail	Customer Service	Central/Eastern Europe	Asia-Pacific
		Large Business/Org	Manufacturing	Field/Frontline Worker		
		MNC Business/Org	Education	Mobile/Remote Worker		

Source: Frost & Sullivan

Growth Opportunity 3: Microsoft, Zoom, Google and Cisco Dominating Cloud Meeting and Team Collaboration Services

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.

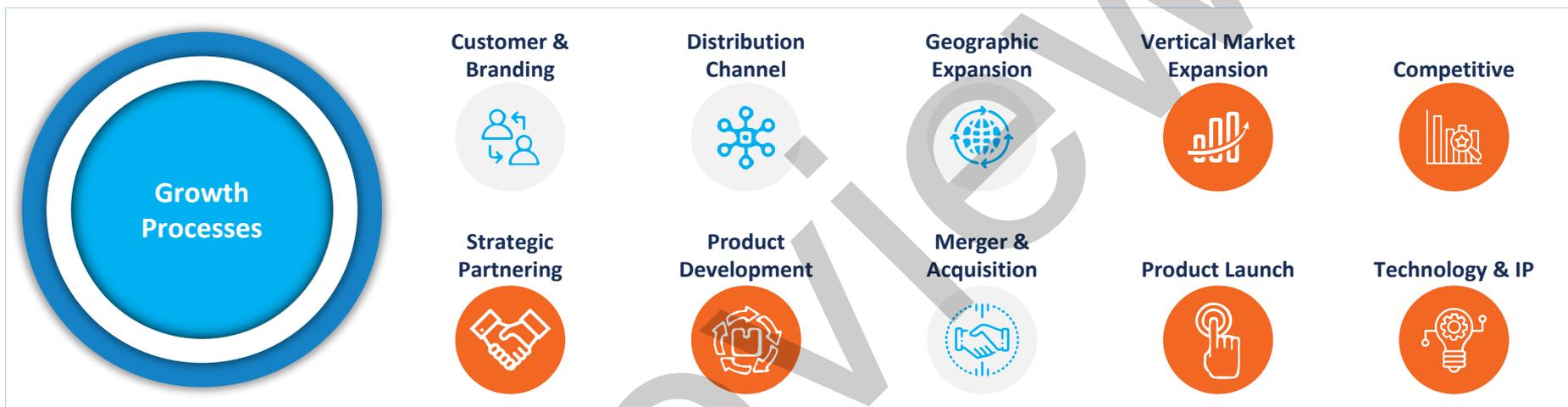


Opp. Size in 5 Years	>\$1 B	Relevant Industries for this Growth Opportunity			Applicable Regions	
Timeline for Action	2 to 3 Years	Sole Proprietor	Public Sector	CXO	North America	Western Europe
		Micro Business/Org	Healthcare	Knowledge Worker	Latin America	Africa
		Small Business/Org	Financial Services	Back Office		
Base Year	2022	Mid Business/Org	Retail	Customer Service	Central/Eastern Europe	Asia-Pacific
		Large Business/Org	Manufacturing	Field/Frontline Worker		
		MNC Business/Org	Education	Mobile/Remote Worker		

Source: Frost & Sullivan

Growth Opportunity 4: Frontline Workers and Evolving Vertical Use Cases Expand Potential Sales of Professional Headsets

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.



Opp. Size in 5 Years	>\$1 B	Relevant Industries for this Growth Opportunity			Applicable Regions	
Timeline for Action	Up to 7 Years	Sole Proprietor	Public Sector	CXO	North America	Western Europe
		Micro Business/Org	Healthcare	Knowledge Worker		
		Small Business/Org	Financial Services	Back Office	Latin America	Africa
		Mid Business/Org	Retail	Customer Service		
		Large Business/Org	Manufacturing	Field/Frontline Worker	Central/Eastern Europe	Asia-Pacific
MNC Business/Org	Education	Mobile/Remote Worker				
Base Year	2022					

Source: Frost & Sullivan

Growth Opportunity 5: The Metaverse Potential Should be Explored

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.



Opp. Size in 5 Years	>\$1 B	Relevant Industries for this Growth Opportunity			Applicable Regions	
Timeline for Action	Up to 7 Years	Sole Proprietor	Public Sector	CXO	North America	Western Europe
		Micro Business/Org	Healthcare	Knowledge Worker	Latin America	Africa
		Small Business/Org	Financial Services	Back Office		
Base Year	2022	Mid Business/Org	Retail	Customer Service	Central/Eastern Europe	Asia-Pacific
		Large Business/Org	Manufacturing	Field/Frontline Worker		
		MNC Business/Org	Education	Mobile/Remote Worker		

Source: Frost & Sullivan



Next Steps

Your Next Steps

Take the Growth Pipeline Diagnostic™

1

Have your Growth Team executives take the online survey for a high-level diagnostic on your growth capabilities

Participate in a customized Growth Pipeline Dialog™

2

Engage in a deep-dive discussion with our consulting team to understand new growth opportunities

Decide on Growth Pipeline Audit™ or GPaaS™ Solution

3

Connect with your Frost & Sullivan consultant to embark on the growth journey

Why Frost, Why Now?

Our Expertise

EXPERIENCE

- 60 years of proven global experience
- Trusted partner of investors, corporates, and governments

COVERAGE

- Industry convergence through comprehensive coverage
- Global footprint to match client needs

ANALYTICS

- Innovation Generator™ driving 6 analytical perspectives
- Proprietary growth tools and frameworks

BEST PRACTICES

- Growth Pipeline Engine™ and Companies to Action™
- 10 Growth Processes: Best practices foundation

Client Impact

- **FUTURE GROWTH POTENTIAL:** Maximized through collaboration
- **GROWTH PIPELINE™:** Continuous flow of growth opportunities
- **GROWTH STRATEGIES:** Proven best practices
- **INNOVATION CULTURE:** Optimized customer experience
- **ROI & MARGIN:** Implementation excellence
- **TRANSFORMATIONAL GROWTH:** Industry leadership

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