

After CarPlay, Apple wants a place at home

One of John Ternus's first major launches as Apple CEO takes the company into a market already served by Amazon and Google. With HomeView, Apple is betting that a smarter Siri and its tightly integrated ecosystem can persuade consumers to pay a premium for a place in their homes.

Charles-Henry Monchau, CFA, CAIA, CMT
Chief Investment Officer
charles-henry.monchau@syzgroup.com

Assia Driss
Syz Research Lab Team Coordinator
assia.driss@syzgroup.com

Romain Marcozzi
Syz Research Lab Team
romain.marcozzi@syzgroup.com

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On 13 October, at its "Welcome Home" event in New York, Apple unveiled HomeView, its first dedicated smart-home hub. The device costs $299 and is built around a square 7-inch touchscreen. It runs a new operating system called HomeOS and identifies each member of the household by face and voice recognition. Preorders are open and shipping starts on 13 November, which places it in stores ahead of the holiday season. On paper, HomeView looks like an elegant replication of Amazon's Echo Show and Google's Nest Hub. In practice, almost everything it promises depends on Siri AI, the assistant Apple has spent the past two years trying to reinvent. At $100 to $200 more than its main rivals, Apple is betting that Siri will be worth the premium.

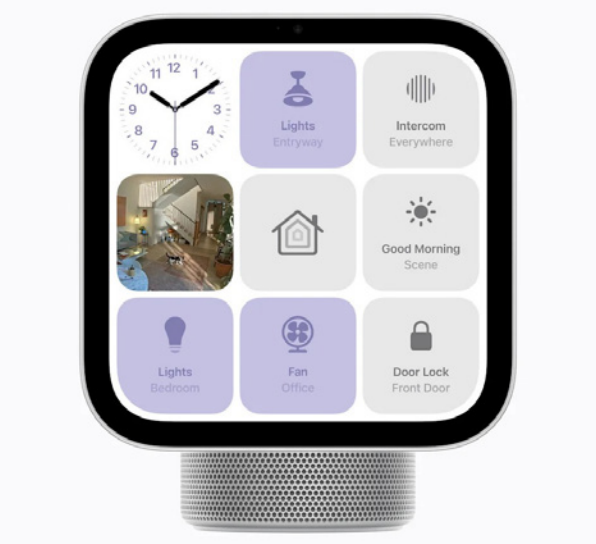
A new addition to the Apple ecosystem

HomeView comes in two versions. The tabletop model sits on a domed aluminium speaker base with an adjustable screen, the second version is a screen alone, designed to hang on a wall. Both cost $299. But the wall mounted version needs installation accessories sold separately for between $59.95 and $129.95.

Inside, HomeView uses the A18 chip found in recent iPhones, alongside a 12MP camera and speakers designed for room-filling sound. It can recognise up to six household members by face or voice, giving each a personalised home screen. The device also supports smart-home accessories from different manufacturers, allowing users to connect products outside the Apple ecosystem. There is, however, no App Store at launch.

The experience is perhaps best understood through everyday use. A mother walks into the kitchen in the morning and HomeView displays her first work meeting, and her commute time. When her son approaches, the screen switches to his school timetable. The interface also adjusts to distance, showing essential information from across the room and more detail up close. Later in the day, a single request to Siri could dim the lights, lock the front door and bring up the doorstep camera to check whether a parcel has arrived. Amazon's Echo Show already offers many of these functions, but Apple goes further by linking facial recognition to individual Apple accounts, allowing the display to adapt to whoever is using it.

HomeView also arrives alongside a broader range of connected-home products. According to Reuters, Apple introduced doorbells, cameras and thermostats developed with LG and Schneider Electric under the Apple Home Collection. The LG floodlight camera costs $399.95, while Schneider's smart lock is priced at $349.95. Apple has also refreshed its existing home lineup, with the new Apple TV 4K costing $100 more than its predecessor and the HomePod mini 2 starting at $149, a $50 increase from the original 2020 model, according to AI Weekly. Together, these products bring more of the household into Apple's ecosystem, with closer integration across the iPhone, Apple Watch and Mac.



Source: Apple

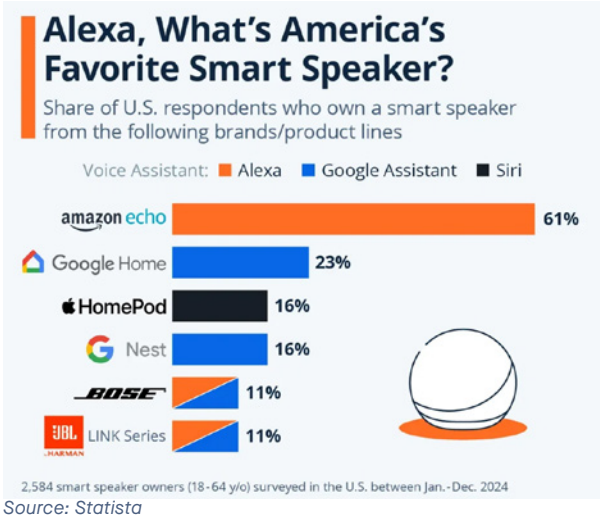
A premium entry into a crowded market

Apple is entering a market where cheaper alternatives are already well established. At $299, HomeView costs roughly $100 more than Amazon's Echo Show 8 and $200 more than Google's Nest Hub. Its screen is also smaller than Amazon's, leaving Siri and the personalised experience to do much of the work in justifying the difference.

	HomeView	Echo Show 8	Nest Hub
Price	$299	$199.99	$99.99
Display	7"	8.7"	7"
Processor	A18	AZ3 Pro	Standard
Camera	12MP	13MP	None
Recognition	6 users	Omnisense sensing	n/a

Competition is also becoming more sophisticated. Amazon is upgrading Alexa with Alexa+, while Google is bringing Gemini into its own devices. Both companies are working to make their assistants more capable, leaving Apple to compete against products that will continue improving after HomeView reaches stores. Compatibility is another consideration. Apple

Home currently works with fewer third-party devices than competing platforms, but a common smart home standard called Matter should gradually make it compatible with more products from different brands.



Source: Statista

Apple's main advantage could be its ability to bring together hardware, software, and personal information already stored across millions of iPhones. HomeView can draw on familiar services such as calendars, messages, and reminders, giving existing Apple customers a more integrated experience. Whether that is enough to justify a premium over Amazon and Google will depend heavily on Siri.

Siri faces its biggest test yet

Apple has spent the past two years trying to reinvent Siri, with repeated delays along the way. The company first promised a more personal assistant at the Worldwide Developers Conference (WWDC) in 2024, before postponing its release to 2026. An agreement to use Google's Gemini models was only finalised in January 2026. The setbacks weighed on Apple's share price around WWDC this year, while the public beta finally arrived in September. HomeView is the first Apple device designed entirely around the new assistant, giving the company an opportunity to demonstrate what its AI capabilities can deliver in everyday use.

For HomeView to succeed, Siri will need to handle complex requests, understand personal context and respond quickly enough to become part of daily routines. According to MacRumors, some AI features require a connected iPhone or iPad, which is also needed for setup. This plays to Apple's strengths among existing customers but makes the device less accessible to households outside its ecosystem. The A18 chip allows some AI processing to take place directly on HomeView, an advantage over many lower-cost hubs, although more demanding tasks still rely on cloud-based models.

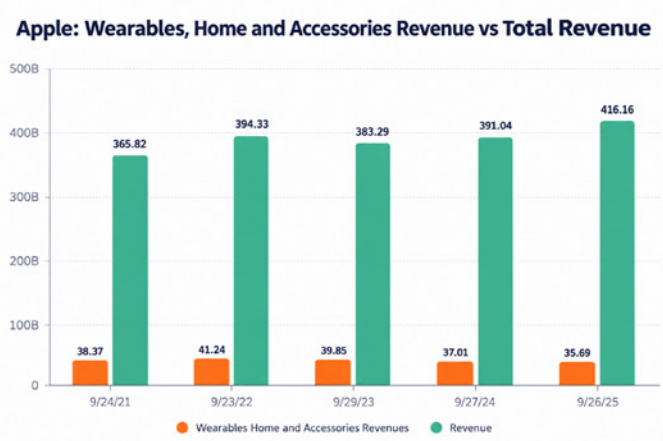
Consumer expectations have also changed considerably. After extensive use of ChatGPT and Gemini, people have grown accustomed to assistants that can follow conversations, understand context and answer complicated questions. Siri will face those expectations from the moment HomeView enters the household. The assistant is still in beta and relies partly on Google's Gemini models, leaving a core part of the experience dependent on a direct competitor. Some server-based capabilities could eventually introduce usage limits or additional fees, while the absence of an App Store and the HomePod's uneven commercial record add to the uncertainty.

The initial rollout will also be limited. HomeView is launching in eight markets: the US, UK, Canada, Australia, New Zealand, India, Singapore and South Africa, where Siri AI will operate in English and remain in beta. Apple says it cannot yet sell the device in the European Union because Siri AI is unavailable on iOS in the region, although it is working with regulators towards a solution. China is also excluded, while French-language support is expected later in Canada. These restrictions will significantly reduce the addressable market during the 2026 holiday season.

A bigger opportunity than hardware sales

For a company of Apple's size, the immediate revenue opportunity is relatively modest. The global smart-display market is estimated at around $5.5bn, with Amazon already holding a leading position. Even looking beyond displays, forecasts remain cautious. Apple's home-based AI companions are expected to reach around 5 million units in annual sales by 2030. A separate estimate puts revenue from its broader AI robots and smart-home category at approximately $3.46bn by the end of the decade.

However, the opportunity comes at a time when Apple's existing home and accessories business could use some momentum. Its Wearables, Home and Accessories division generated $27.3bn in the first nine months of fiscal 2026, up just 2% year on year, while its share of group revenue declined from 8.5% to 7.5%. HomeView could bring fresh growth to the segment, although the financial contribution is likely to remain limited in the near term.



Source: Apple company reports

The more interesting opportunity may come from what follows the hardware purchase. Features such as camera history, AI monitoring and video descriptions could encourage households to upgrade to iCloud+, generating recurring subscription revenue from an expanding base of connected devices. Suppliers could benefit as well, particularly BYD Electronic in assembly, Cowell in optics and Luxshare in acoustics, as Apple brings more sophisticated components into its home products.

There is also a defensive argument for entering the market now. As Reuters notes, Apple increasingly faces competition from AI newcomers such as OpenAI, which have hardware ambitions of their own. If a new generation of AI devices becomes the main way consumers interact with technology, the iPhone could gradually lose some of its position as the gateway to their digital lives. The home is an attractive place for such an interface to develop, with devices that remain connected throughout the day and serve several members of a household. By entering the market now, Apple is extending its ecosystem into another part of consumers' daily routines while protecting the relationship it has built around the iPhone.

Earning trust inside the home

The most delicate issue may not be the technological features after all. A device equipped with cameras and microphones, designed to sit in a kitchen or living room, will have access to information that households may be reluctant to share. Facial and voice recognition are central to the experience, but they also involve collecting biometric information about family members, including children and visitors who may never have agreed to be identified. Reuters notes that the launch comes amid growing concerns over the security of connected household devices.

Privacy within the household presents another challenge. A screen shared by several people must be able to display personal messages, appointments and reminders without exposing them to the wrong family member. Facial recognition is intended to manage that distinction, although it will need to work reliably in poor lighting, or when several people are standing nearby. Some requests will also be processed in the cloud using Gemini-based models, making data storage, retention and access important considerations. Apple's reputation for privacy could give it an advantage over competitors, provided HomeView meets the standards consumers have come to expect from the company.

Reliability matters just as much. An incorrect answer from a chatbot is usually an inconvenience, but a misunderstood instruction to a connected-home assistant could unlock a door, turn off the heating overnight or cancel an alarm. As AI moves from answering questions to controlling physical devices, the consequences of mistakes become more serious. Apple may need additional confirmation steps for sensitive actions and greater reliance on on-device processing through the A18 chip. A widely reported security failure or a serious error could quickly undermine consumer confidence in the product and the wider category.

Conclusion

HomeView is Apple's most serious attempt yet to win a place in the home, and its first real test of Siri AI. The hardware is polished and the personalisation is genuinely new, but the premium price only makes sense if the assistant delivers and earns households' trust. The first reviews after 13 November and holiday sales will give an early verdict, followed by the end of the Siri beta, a launch date in the EU and any opening to third-party apps. Until then, HomeView remains a promising device waiting for its software to catch up.

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For further information

Banque Syz SA
Quai des Bergues 1
CH-1201 Geneva
T. +41 58 799 10 00
syzgroup.com

Charles-Henry Monchau, CFA, CAIA, CMT
Chief Investment Officer
charles-henry.monchau@syzgroup.com

Assia Driss
Syz Research Lab Team Coordinator
assia.driss@syzgroup.com

Romain Marcozzi
Syz Research Lab Team
romain.marcozzi@syzgroup.com

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