Smart Speakers Research – Q1 2018

Contact info@delineate.agency for more information.
1 in 6 now have a smart speaker

For each of the following types of devices, which statement best describes your experience or feelings?
- Smart speaker/voice-control home assistant: Net of "personally own one" and "have access to one at home"
Smart Speakers Research Q1 2018

For each of the following types of devices, which statement best describes your experience or feelings?
- Smart speaker/voice-control home assistant: "I don't have one but I'm interested in getting one"

UK households
11.8 million have or considering
One in six UK homes & one in four US homes now have a smart speaker, and a further quarter are interested in getting one.

For each of the following types of devices, which statement best describes your experience or feelings?

One in six homes have a smart speaker; a further quarter are interested in getting one.
- Virtually everyone (95%) has heard of them, but 1 in 5 don’t know much about them.
- A third reject the idea, in line with rejection of other smart tech, but only one in ten reject the idea of any smart tech.

Smart technology access/owned & consideration (% Among All adults)

For each of the following types of devices, which statement best describes your experience or feelings?
Base: Nationally representative sample of adults UK N=2009

Access/Consider
- ANY OF THESE (99%)
- ANY SMART TECH (86%)
- Smart TV (74%)
- Smart health tracker (45%)
- Smart speaker (43%)
- Smart watch (39%)
- Smart home security (45%)
- Smart thermostat (43%)
- Smart vacuum cleaner (33%)
- Other smart tech (37%)

Access/IOwn
- ANY OF THESE (97%)
- ANY SMART TECH (65%)
- Smart TV (49%)
- Smart health tracker (23%)
- Smart speaker (17%)
- Smart watch (14%)
- Smart home security (11%)
- Smart thermostat (11%)
- Smart vacuum cleaner (6%)
- Other smart tech (11%)

Access/Consider
- ANY COMMON TECH (98%)
- Smart phone (87%)
- Laptop (89%)
- Tablet (84%)
- Desktop (71%)
- e-reader (53%)

Access/IOwn
- ANY COMMON TECH (96%)
- Smart phone (81%)
- Laptop (78%)
- Tablet (71%)
- Desktop (58%)
- e-reader (38%)

For each of the following types of devices, which statement best describes your experience or feelings?
Base: Nationally representative sample of adults UK N=2009
One in four own/have access to a smart speaker; a further quarter are interested in getting one
- Virtually everyone (95%) has heard of them, but 1 in 5 don’t know much about them
- a third reject the idea, in line with rejection of other smart tech, but only one in ten reject the idea of any smart tech

For each of the following types of devices, which statement best describes your experience or feelings?
Base: Nationally representative sample of adults US N=2007
Amazon is the clear leader but Google and Apple aren’t far behind

For each of the following brands of smart speaker, which statement best describes your experience or feelings? (Q.TL2)
Base: Nationally representative sample of adults UK N=1004, US N=1005
Smart speakers are starting to be used across a wide range of tasks

- Learn something: 51% (traditional) vs. 51% (smart speaker)
- Check facts: 12% (traditional) vs. 10% (smart speaker)
- Research a brand / company: 46% (traditional) vs. 43% (smart speaker)
- Help choose a brand / product: 43% (traditional) vs. 42% (smart speaker)
- Entertainment / Fun: 42% (traditional) vs. 42% (smart speaker)
- Follow the News: 42% (traditional) vs. 42% (smart speaker)
- Follow celebs / pop culture: 30% (traditional) vs. 8% (smart speaker)

For each of the following activities, which of the following sources of information would you use to do that? (Q.M1)

- Internet searches via smartphone/computer // Searches via a smart speaker/home assistant

What does this mean for Communicators?
Almost one in ten are already using smart speakers to help them decide on brands & products

For each of the following activities, which of the following sources of information would you use to do that? (Q.M1)
- To help you decide which brand or product to buy/use

Smart speakers aren’t just for asking random questions, half of users are already shopping with them

ANY OF THESE

Entertainment
Information
Organisation
Home/Device control
Shopping (Any)
Grocery shopping

Ever do
Regularly do

For each of the activities below, please select one option which best describes how you currently use your smart speaker nowadays? (Q.TL3)
List of 20+ activities asked, later grouped and 'netted' by theme during analysis
Base: Adults who own/have access to a smart speaker UK N=380, US N=476
Smart speaker homes seem to be switching from computer shopping to their device - but shoppers continue to visit the store

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<thead>
<tr>
<th></th>
<th>% Ever do</th>
<th>% Regularly</th>
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<tr>
<td><strong>All adults</strong></td>
<td>86%</td>
<td>67%</td>
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<td></td>
<td>44%</td>
<td>20%</td>
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<td></td>
<td>9%</td>
<td>1%</td>
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<tr>
<td><strong>Online shoppers</strong></td>
<td>84%</td>
<td>53%</td>
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<td></td>
<td>73%</td>
<td>40%</td>
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<td></td>
<td>17%</td>
<td>8%</td>
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<tr>
<td><strong>Smart speaker homes</strong></td>
<td>85%</td>
<td>66%</td>
</tr>
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<td></td>
<td>66%</td>
<td>33%</td>
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<td></td>
<td>49%</td>
<td>24%</td>
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When shopping for groceries/toiletries, which of the following do you do nowadays? (Q.TL5)
Smart speaker homes are increasingly using their device to add to their shopping basket

% Adding to basket…

- Via computer/app among online shoppers
  - UK: 48% Ever do, 21% Regularly do
  - US: 37% Ever do, 16% Regularly do

- Via smart speaker among homes with one
  - UK: 49% Ever do, 22% Regularly do
  - US: 35% Ever do, 22% Regularly do

When shopping for groceries/toiletries, which of the following do you do nowadays? (Q.TL5)
Base: Online shoppers UK N=494, US N=459, Own/Access smart speaker UK N=190, US N=220
And they fill their baskets in multiple ways, interactions can be ad-hoc or planned

**% Adding to basket…**

**Basket builders**
(shop without reserving slot)

- **Ever do**
  - UK: 52%
  - US: 46%

- **Regularly do**
  - UK: 19%
  - US: 22%

**Slot blockers**
(reserve a slot with a few items)

- **Ever do**
  - UK: 21%
  - US: 15%

- **Regularly do**
  - UK: 37%
  - US: 34%

Thinking about buying groceries toiletries, which statement best describes how you currently use your smart speaker? (Q.TL4)

Base: Own/Access smart speaker UK N=190, US N=220
Smart speakers aren’t just for re-ordering brands on the regular shopping list but also for discovering & buying new brands

**Using a smart speaker to shop**

- **Any re-ordering**
  - Groceries: 48% Ever do now, 28% Regularly do now
  - Toiletries: 47% Ever do now, 25% Regularly do now

- **Any 1st time buying**
  - Groceries: 42% Ever do now, 19% Regularly do now
  - Toiletries: 48% Ever do now, 22% Regularly do now

Thinking about buying groceries toiletries, which statement best describes how you currently use your smart speaker? (Q.TL4)

Base: Own/Access smart speaker UK N=190, US N=220
So what does this mean?

- Smart speakers are now mass
- A new channel for consumers to engage with brands
- Brands have an opportunity to create interesting and engaging ways to connect with consumers
- Communicators have a key role to connect consumers with these brands
Methodology

- 4,000 consumers aged 18+ were surveyed, 2,000 in the UK and 2,000 in the US.
- Respondents were sourced from https://opinion.life research panels and are representative of age, gender and region in each market.
- The survey was conducted in February 2018.
About delineate
Our clients don’t have time to search for that data or read all those reports. Time has always been against us but now we drown in more and more data. Getting to the exciting part, the insight, the evidence, that golden nugget, has never been more important.

In the 1920s silent movie audiences were much the same. They didn’t have time for reading lots of dialogue, they wanted action. And so studio executives would often order directors to “cut to the chase”. Get to the bit that people want to see!

We feel the same. We want to cut through the jargon, through the distractions, and through the clutter. We want to help clients cut to the chase.

Our imagery is of Harold Lloyd, a Director, Producer, Actor and Stuntman of the 1920s. He embodies the cut to the chase ethos and the type of people we want to hire!
What we do

authentic audience insights
truly understand what makes your audience tick and identify campaign opportunities

original research-based content
from killer stats to full thought leadership research, we give content marketing an insight injection

measurement and analytics
prioritize and target audiences, test campaign messaging and creative and evidence the impact of campaigns

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