18% of Americans 18+ own a Smart Speaker, or around 43 million people.
Early Adopters

13.5%

Early Majority

34%

Late Majority

34%

Laggards

16%

New Product Adoption Curve: Smart Speakers

Innovators

2.5%

Early Adopters

13.5%

Early Majority

JAN 2017

JAN 2018

Late Majority

34%

Laggards

16%

JAN 2017

JAN 2018

New Product Adoption Curve: Smart Speakers

Innovators

2.5%

Early Adopters

13.5%

Early Majority

34%

Late Majority

34%

Laggards

16%
Methodology

• 909 person online survey
  • Adults age 18 and older
  • National study conducted 5/21/2018 – 6/1/2018
  • All respondents report owning a smart speaker
  • Tracking from Spring 2017 and Fall/Winter 2017 surveys
Ownership & Usage
Smart Speaker Owners: Age

- Age 25-34: 21%
- Age 35-44: 24%
- Age 45-54: 21%
- Age 55+: 18%
- Age 18-24: 15%
Smart Speaker Owners: Gender

Women 54%
Men 46%
Smart Speaker Owners: Length of Ownership

First Adopters
Owned one year or more

Early Mainstream
Owned less than one year

26%

74%
Smart Speaker Owners: Age

First Adopters:
- Age 45-54: 19%
- Age 35-44: 25%
- Age 25-34: 12%
- Age 18-24: 11%
- Age 55+: 33%

Early Mainstream:
- Age 45-54: 26%
- Age 35-44: 19%
- Age 25-34: 20%
- Age 18-24: 16%
- Age 55+: 19%
Smart Speaker Owners: Gender

First Adopters
- Women: 58%
- Men: 42%

Early Mainstream
- Women: 53%
- Men: 47%
Think back to the first month you owned a smart speaker. Compared to that first month, are you now using it…?

- **First Adopters**
  - More often: 48%
  - About the same: 19%
  - Less often: 33%

- **Early Mainstream**
  - More often: 54%
  - About the same: 12%
  - Less often: 34%

Base: Had a smart speaker more than one month and gave a response
How many smart speakers do you own?

<table>
<thead>
<tr>
<th></th>
<th>One</th>
<th>Two</th>
<th>Three or more</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First Adopters</strong></td>
<td>45%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td><strong>Early Mainstream</strong></td>
<td>54%</td>
<td>30%</td>
<td>16%</td>
</tr>
</tbody>
</table>
Do you think you will purchase another smart speaker for your household?

- First Adopters: 44%
- Early Mainstream: 58%

% saying yes
You want to buy another smart speaker…?

- To control appliances or lights in more rooms of your house: 65%
- To listen to news in more rooms of your house: 60%
- To try the technology from another type of smart speaker: 58%
- To use as an intercom system in your house: 57%
- For home security: 49%
- To entertain children in more rooms of the house: 41%

Base: Plan to purchase another smart speaker
Media Behaviors & Interests
How do you listen to audio most often?

<table>
<thead>
<tr>
<th>Device Type</th>
<th>First Adopters</th>
<th>Early Mainstream</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone/tablet</td>
<td>23</td>
<td>26</td>
</tr>
<tr>
<td>Smart speaker</td>
<td>22</td>
<td>25</td>
</tr>
<tr>
<td>Speaker connected to smartphone</td>
<td>21</td>
<td>19</td>
</tr>
<tr>
<td>AM/FM radio</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>Computer/laptop</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td>iPod or other mp3 player</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>CD player</td>
<td>1</td>
<td>3</td>
</tr>
</tbody>
</table>
For First Adopters, smart speakers are now the #1 way they listen to audio
Which spoken-word topics or style of programs would you be interested in listening to on your smart speaker?

- **News and current affairs**: 73%
- **Comedy**: 65%
- **Music, arts and culture**: 56%
- **Food**: 50%
- **Sports**: 49%
- **Educational**: 42%
- **Technology**: 44%
- **Mindfulness/Wellness**: 38%

**First Adopters**

- **News and current affairs**: 66%
- **Comedy**: 65%
- **Music, arts and culture**: 56%
- **Food**: 50%
- **Sports**: 49%
- **Educational**: 42%
- **Technology**: 44%
- **Mindfulness/Wellness**: 38%

**Early Mainstream**

- **News and current affairs**: 73%
- **Comedy**: 66%
- **Music, arts and culture**: 63%
- **Food**: 58%
- **Sports**: 54%
- **Educational**: 53%
- **Technology**: 49%
- **Mindfulness/Wellness**: 48%
Do you ever listen to news on your smart speaker?

- First Adopters: 69%
- Early Mainstream: 72%

% saying yes
37% of smart speaker owners listen to 2+ hours of news on their smart speaker each week.

Base: Own a smart speaker.
In the last week, how much time did you spend listening to news programming on your smart speaker?

<table>
<thead>
<tr>
<th>First Adopters</th>
<th>Fewer than 30 minutes</th>
<th>30 minutes to less than one hour</th>
<th>One hour to less than 2 hours</th>
<th>2 hours to less than 4 hours</th>
<th>4 hours or more</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>17%</td>
<td>22%</td>
<td>24%</td>
<td>22%</td>
<td>15%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Early Mainstream</th>
<th>Fewer than 30 minutes</th>
<th>30 minutes to less than one hour</th>
<th>One hour to less than 2 hours</th>
<th>2 hours to less than 4 hours</th>
<th>4 hours or more</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>17%</td>
<td>14%</td>
<td>33%</td>
<td>21%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Base: Got the news on smart speaker in the last week
How often do you listen to podcasts?

<table>
<thead>
<tr>
<th></th>
<th>Several times per day</th>
<th>Nearly every day</th>
<th>At least once per week</th>
<th>At least once per month</th>
<th>Less than once per month</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Adopters</td>
<td>6%</td>
<td>10%</td>
<td>16%</td>
<td>10%</td>
<td>21%</td>
<td>37%</td>
</tr>
<tr>
<td>Early Mainstream</td>
<td>4%</td>
<td>13%</td>
<td>22%</td>
<td>12%</td>
<td>19%</td>
<td>30%</td>
</tr>
</tbody>
</table>
When you listen to podcasts through a mobile device on a smart speaker, how do you listen most often?

<table>
<thead>
<tr>
<th></th>
<th>First Adopters</th>
<th>Early Mainstream</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start the podcast on another device and connect it to play on the smart speaker</td>
<td>40%</td>
<td>26%</td>
</tr>
<tr>
<td>Play the podcast directly through the smart speaker</td>
<td>60%</td>
<td>74%</td>
</tr>
</tbody>
</table>

Base: Listened to a podcast on a smart speaker in the past week
Activities & Usage
In the past week, have you requested your smart speaker to…?

<table>
<thead>
<tr>
<th>Activity</th>
<th>First Adopters</th>
<th>Early Mainstream</th>
</tr>
</thead>
<tbody>
<tr>
<td>Play music</td>
<td>90</td>
<td>89</td>
</tr>
<tr>
<td>Get the weather</td>
<td>81</td>
<td>85</td>
</tr>
<tr>
<td>Answer a general question</td>
<td>83</td>
<td>85</td>
</tr>
<tr>
<td>Set a timer/alarm</td>
<td>66</td>
<td>69</td>
</tr>
<tr>
<td>Check the time</td>
<td>61</td>
<td>65</td>
</tr>
<tr>
<td>Get the news</td>
<td>51</td>
<td>58</td>
</tr>
<tr>
<td>Tell a joke</td>
<td>50</td>
<td>48</td>
</tr>
</tbody>
</table>
In the past week, have you requested your smart speaker to…?

<table>
<thead>
<tr>
<th>Activity</th>
<th>First Adopters</th>
<th>Early Mainstream</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen to an AM/FM radio station</td>
<td>41</td>
<td>47</td>
</tr>
<tr>
<td>Get a sports score or update</td>
<td>35</td>
<td>37</td>
</tr>
<tr>
<td>Receive reminders</td>
<td>33</td>
<td>39</td>
</tr>
<tr>
<td>Get the traffic</td>
<td>24</td>
<td>36</td>
</tr>
<tr>
<td>Check or add something to your calendar</td>
<td>29</td>
<td>35</td>
</tr>
<tr>
<td>Look up recipes/cooking requests</td>
<td>23</td>
<td>37</td>
</tr>
<tr>
<td>Find restaurants or businesses in your area</td>
<td>27</td>
<td>36</td>
</tr>
</tbody>
</table>

% saying yes
In the past week, have you requested your smart speaker to…?

- Control household devices: 37%
- Add an item to your shopping list: 33%
- Add an item to your to-do list: 32%
- Make a phone call (to mobile or landlines): 34%
- Connect with other Smart Speakers in home: 30%
- Play a podcast: 28%
- Play a game (Such as Jeopardy, Trivia): 25%

% saying yes

First Adopters
Early Mainstream
% using smart speaker to...

- Control home lighting, thermostat or appliances using smart speaker
  - First Adopters: 24%
  - Early Mainstream: 13%

- Control home security (control or monitor your household door locks, security systems)
  - First Adopters: 8%
  - Early Mainstream: 5%

- Control outside lighting, sprinklers, or other outdoor equipment using smart speaker
  - First Adopters: 10%
  - Early Mainstream: 2%

Base: Gave a response
First adopters demonstrate more advanced smart speaker use – controlling home security and other household devices.

Early mainstream users are relying on their smart speakers for a wider range of daily activities – ordering food, making calls, getting traffic reports, researching products and shopping.
Weekly tasks indexed to total smart speaker owners (First Adopters)

<table>
<thead>
<tr>
<th>Task</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control household devices</td>
<td>14</td>
</tr>
<tr>
<td>Connect with Smart Speakers (outside home)</td>
<td>9</td>
</tr>
<tr>
<td>Tell a joke</td>
<td>3</td>
</tr>
<tr>
<td>Play music</td>
<td>1</td>
</tr>
<tr>
<td>Play a game</td>
<td>1</td>
</tr>
<tr>
<td>Answer a general question</td>
<td>-2</td>
</tr>
<tr>
<td>Get the weather</td>
<td>-3</td>
</tr>
<tr>
<td>Set a timer/alarm</td>
<td>-4</td>
</tr>
<tr>
<td>Check the time</td>
<td>-4</td>
</tr>
<tr>
<td>Receive reminders</td>
<td>-9</td>
</tr>
<tr>
<td>Add an item to your to-do list</td>
<td>-9</td>
</tr>
<tr>
<td>Listen to an AM/FM radio station</td>
<td>-10</td>
</tr>
<tr>
<td>Get the news</td>
<td>-10</td>
</tr>
<tr>
<td>Check or add something to calendar</td>
<td>-13</td>
</tr>
</tbody>
</table>
Weekly tasks indexed to total smart speaker owners
(Early Mainstream)

- Order food: 14
- Get the traffic: 11
- Look up recipes/other cooking requests: 11
- Make a phone call (to mobile or landlines): 10
- Play a podcast: 8
- Play NPR: 7
- Find restaurants or businesses in area: 7
- Get a sports score or update: 7
- Add an item to your shopping list: 6
- Read short stories: 6
- Order an item: 6
- Connect with Smart Speakers (in home): 5
- Play an audiobook: 5
- Check or add something to your calendar: 5
## Top three indexing activities by daypart:

<table>
<thead>
<tr>
<th>5am – 9am</th>
<th>9am – 5pm</th>
<th>5pm – 9pm</th>
<th>9pm – Midnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Traffic</td>
<td>Order Item</td>
<td>Order food</td>
<td>Control devices</td>
</tr>
<tr>
<td>#2 Weather</td>
<td>Listen to AM/FM station</td>
<td>Play game</td>
<td>Read short stories</td>
</tr>
<tr>
<td>#3 News</td>
<td>Add to shopping list</td>
<td>Find restaurant or business</td>
<td>Play audiobook</td>
</tr>
</tbody>
</table>

Base: Own a smart speaker
% agreeing with statements about smart speakers

- You are listening to more audio since you got your smart speaker: 63% (First Adopters), 70% (Early Mainstream)
- You don’t know enough about your smart speaker to use all of its features: 54% (First Adopters), 65% (Early Mainstream)
- The smart speaker has made it easier to entertain the children in your household: 54% (First Adopters), 62% (Early Mainstream)

Base: Have children in household
Children & Families
How often do you use the smart speaker with others in your household?

- Most of the time: 47%
- Occasionally: 43%
- Rarely: 8%
- Never: 2%

Base: Multiple people in household
Do your children ever use the smart speaker in your home?

Base: Have children in household

Yes: 73%
No: 27%
25% of smart speaker owners with children in their households say their kids use the speaker to help with homework

Base: Children in home use smart speaker
Have your children ever requested your smart speaker to…?

- Play music: 55%
- Answer question: 44%
- Tell a joke: 40%
- Play a game: 28%
- Help with homework: 25%
- Set timer or alarm: 25%
- Control lights/electronics: 14%
- Connect with people in home: 10%
- Read short stories/audiobooks: 10%
- Connect with people outside home: 9%
- Play podcasts: 5%

% saying yes

Base: Children in home use smart speaker
Smart Speaker Owners: Children in Household

First Adopters: 36%
Early Mainstream: 45%
% with children in household
% agreeing with statements about smart speakers

You purchased your smart speaker to reduce screen time
- First Adopters: 24%
- Early Mainstream: 43%

You or your family members talk to your smart speaker during meal time
- First Adopters: 17%
- Early Mainstream: 41%

Base: Have children in household
Changing Behaviors & Attitudes
% agreeing with statements about smart speakers

- You have encouraged your friends to get a smart speaker: 52% (First Adopters), 61% (Early Mainstream)
- You wouldn’t want to go back to life without your smart speaker: 55% (First Adopters), 54% (Early Mainstream)
- Since getting a smart speaker, you are using the voice-operated assistant on your smartphone more: 44% (First Adopters), 56% (Early Mainstream)

Base: Have smartphone

% agreeing
Do you ever use the voice-operated personal assistant on your smartphone?

- First Adopters: 71%
- Early Mainstream: 82%

Base: Own a smartphone
% who purchased smart speaker hoping to reduce screen time:

- First Adopters: 22
- Early Mainstream: 38
% who spend less time with other technology since getting a smart speaker:

- First Adopters: 23%
- Early Mainstream: 33%
Is the time you spend using your smart speaker replacing any time you used to spend with…?

<table>
<thead>
<tr>
<th>Device</th>
<th>First Adopters</th>
<th>Early Mainstream</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional AM/FM radio</td>
<td>40</td>
<td>45</td>
</tr>
<tr>
<td>Smartphone</td>
<td>26</td>
<td>38</td>
</tr>
<tr>
<td>Computer</td>
<td>24</td>
<td>36</td>
</tr>
<tr>
<td>Tablet</td>
<td>24</td>
<td>30</td>
</tr>
<tr>
<td>Printed publications</td>
<td>22</td>
<td>32</td>
</tr>
<tr>
<td>Television</td>
<td>18</td>
<td>29</td>
</tr>
<tr>
<td>Sonos or other sound system</td>
<td>15</td>
<td>20</td>
</tr>
</tbody>
</table>
Purchasing & Advertising Attitudes
Through your smart speaker, have you…?

- Added an item to your cart so you could review it later for purchase:
  - First Adopters: 26%
  - Early Mainstream: 25%

- Researched an item you might want to purchase:
  - First Adopters: 23%
  - Early Mainstream: 37%

- Re-ordered an item you have previously purchased:
  - First Adopters: 22%
  - Early Mainstream: 16%

- Ordered a new product you have not previously purchased:
  - First Adopters: 17%
  - Early Mainstream: 17%

% saying yes
In the last three months, how many items have you purchased using your smart speaker?

<table>
<thead>
<tr>
<th></th>
<th>Zero</th>
<th>One</th>
<th>Two</th>
<th>Three</th>
<th>Four to five</th>
<th>Six+</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Adopters</td>
<td>29%</td>
<td>17%</td>
<td>23%</td>
<td>20%</td>
<td>5%</td>
<td>6%</td>
<td>2.1</td>
</tr>
<tr>
<td>Early Mainstream</td>
<td>26%</td>
<td>17%</td>
<td>16%</td>
<td>15%</td>
<td>15%</td>
<td>12%</td>
<td>2.7</td>
</tr>
</tbody>
</table>

Base: Previously added item to cart or researched or ordered an item on smart speaker
How would you describe your attitude about the following types of advertisements?

<table>
<thead>
<tr>
<th>Type of Advertisement</th>
<th>You like it</th>
<th>You don't mind it</th>
<th>You hate it</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skills/features created by brands</td>
<td>22</td>
<td>59</td>
<td>19</td>
</tr>
<tr>
<td>Host-read ads on podcasts</td>
<td>11</td>
<td>56</td>
<td>33</td>
</tr>
<tr>
<td>Product endorsements</td>
<td>10</td>
<td>57</td>
<td>33</td>
</tr>
<tr>
<td>Sponsors or underwriter announcements during public radio</td>
<td>9</td>
<td>57</td>
<td>34</td>
</tr>
<tr>
<td>Recorded ads during podcasts</td>
<td>9</td>
<td>48</td>
<td>43</td>
</tr>
<tr>
<td>Single advertisements in the middle of on demand program</td>
<td>9</td>
<td>47</td>
<td>44</td>
</tr>
<tr>
<td>Commercial breaks during commercial radio</td>
<td>8</td>
<td>50</td>
<td>42</td>
</tr>
<tr>
<td>Commercial breaks in the middle of traditional television</td>
<td>6</td>
<td>49</td>
<td>45</td>
</tr>
</tbody>
</table>

Base: Gave a response
81% of smart speaker owners are open to skills and features created by brands on smart speakers.