21% of people in the U.S. 18+ own a Smart Speaker, or around 53 million people.

14 million new smart speaker owners in 2018.
New Product Adoption Curve: Smart Speakers

- **Innovators**: 2.5%
  - JAN 2017
- **Early Adopters**: 13.5%
  - DEC 2017
- **Early Majority**: 34%
  - DEC 2018
- **Late Majority**: 34%
- **Laggards**: 16%
  - DEC 2018

**JAN 2017**

**DEC 2017**

**DEC 2018**
How many smart speakers do you own?

<table>
<thead>
<tr>
<th>December 2017</th>
<th>One</th>
<th>Two</th>
<th>Three or more</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>62%</td>
<td>21%</td>
<td>17%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>December 2018</th>
<th>One</th>
<th>Two</th>
<th>Three or more</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>48%</td>
<td>22%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Base: Own a smart speaker and expressing an opinion
Number of Smart Speakers in U.S. households grows by 78% in one year

December 2017: 66.7 Million
December 2018: 118.5 Million

Number of smart speakers in U.S. households
In the 2018 holiday season, 8% of people in the U.S. got a Smart Speaker
How likely are you to purchase another smart speaker within the next six months?

- Very Likely: 7%
- Somewhat Likely: 23%
- Not At All Likely: 69%
- Don't know: 1%

Base: Own a smart speaker
How often do you use your smart speaker?

- Several times a day: 29%
- Nearly every day: 24%
- At least once per week: 18%
- At least once per month: 8%
- Less than once per month: 5%
- Never: 16%

Base: Own a smart speaker and expressing an opinion
Awareness of Smart Speakers

<table>
<thead>
<tr>
<th></th>
<th>January 2016</th>
<th>December 2017</th>
<th>December 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>62</td>
<td>75</td>
<td>77</td>
</tr>
</tbody>
</table>

% aware of any smart speaker device

Source: January 2016 data from Infinite Dial from Edison Research and Triton Digital; December 2017 and 2018 data from The Smart Audio Report from NPR and Edison Research.
Methodology

- 1002 person telephone survey
- Adults age 18 and older
- National study conducted 12/26/2018 – 12/30/2018
- Tracking from study conducted 12/26/2017 – 12/30/2018
npr.org/smartaudio