Methodology

1620 online surveys
800 Smart Speaker owners
820 Non-owners
Adults 18+
Data weighted to Smart Speaker owner estimates from Infinite Dial 2017

15 in-home interviews with Smart Speaker owners
Conducted in Atlanta, Chicago, Los Angeles, New Jersey, and Allentown, PA
Smart Speaker Ownership

Total Population 12+

- Amazon Alexa*: 5%
- Google Home: 2%
- Own either Amazon Alexa or Google Home: 7% (Asked as “Amazon Echo or Amazon Dot, which uses the Alexa voice service”)

% owning smart speaker

The Infinite Dial © 2017 Edison Research and Triton Digital
Smart Speaker Owners:

- Alexa only 76%
- Google Home only 16%
- Both 8%
Subscribe to Amazon Prime:

Smart Speaker Owners: 82%

Non-Owners: 44%
How many Smart Speakers do you own?

<table>
<thead>
<tr>
<th>Number of Smart Speakers</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>58%</td>
</tr>
<tr>
<td>Two</td>
<td>24%</td>
</tr>
<tr>
<td>Three or more</td>
<td>18%</td>
</tr>
</tbody>
</table>

*Smart Speaker Owners*
45% of Smart Speaker Owners plan to purchase another Smart Speaker
Where is your primary Smart Speaker located?

**Smart Speaker Owners**

- Living space (family room/living room/den): 52%
- Kitchen: 24%
- Master bedroom: 12%
- Other bedroom: 5%
- Other location: 7%
- Other (if own more than one respondent was asked about the location of the speaker used most. If only one speaker respondent asked the location of speaker.)
Smart Speaker Owners
Compared to the first month of ownership, are you now using your Smart Speaker...?

- More often: 47%
- About the same: 36%
- Less often: 17%
<table>
<thead>
<tr>
<th>Reason</th>
<th>% Saying Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen to music</td>
<td>90</td>
</tr>
<tr>
<td>Ask questions without needing to type</td>
<td>87</td>
</tr>
<tr>
<td>It seemed like a fun new gadget</td>
<td>86</td>
</tr>
<tr>
<td>Listen to news and information</td>
<td>77</td>
</tr>
<tr>
<td>Control audio with your voice</td>
<td>71</td>
</tr>
<tr>
<td>To make it easier to do things</td>
<td>69</td>
</tr>
<tr>
<td>Quality of sound</td>
<td>65</td>
</tr>
<tr>
<td>Set alarms</td>
<td>63</td>
</tr>
<tr>
<td>Reason</td>
<td>% Saying Reason</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Hear better music than on AM/FM radio</td>
<td>62</td>
</tr>
<tr>
<td>Discover new songs</td>
<td>53</td>
</tr>
<tr>
<td>Control smart home devices</td>
<td>48</td>
</tr>
<tr>
<td>Listen to talk radio/sports talk</td>
<td>44</td>
</tr>
<tr>
<td>Listen to podcasts</td>
<td>40</td>
</tr>
<tr>
<td>Replace an old stereo</td>
<td>39</td>
</tr>
<tr>
<td>Entertain children</td>
<td>36</td>
</tr>
<tr>
<td>Help Disability</td>
<td>16</td>
</tr>
<tr>
<td>Help elderly</td>
<td>12</td>
</tr>
</tbody>
</table>
42% of Smart Speaker Owners say that their Smart Speakers are essential to their everyday lives.
Smart Speaker Owners

**Strongly Agree/Agree:**

65%

How much do you agree/disagree...

"You wouldn't want to go back to life without your Smart Speaker"
<table>
<thead>
<tr>
<th>Activity</th>
<th>% Using Smart Speaker Regularly</th>
<th>Activity</th>
<th>% Using Smart Speaker Regularly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Play music</td>
<td>68</td>
<td>Jokes</td>
<td>22</td>
</tr>
<tr>
<td>Get the weather</td>
<td>58</td>
<td>AM/FM sports radio</td>
<td>22</td>
</tr>
<tr>
<td>General question</td>
<td>52</td>
<td>Cooking requests</td>
<td>18</td>
</tr>
<tr>
<td>News</td>
<td>45</td>
<td>Games</td>
<td>18</td>
</tr>
<tr>
<td>Timers/Alarms</td>
<td>43</td>
<td>Podcasts</td>
<td>17</td>
</tr>
<tr>
<td>Check the time</td>
<td>43</td>
<td>Stock prices</td>
<td>16</td>
</tr>
<tr>
<td>AM/FM music radio</td>
<td>38</td>
<td>Translate</td>
<td>14</td>
</tr>
<tr>
<td>Control devices</td>
<td>33</td>
<td>Audiobooks</td>
<td>14</td>
</tr>
<tr>
<td>AM/FM news talk</td>
<td>32</td>
<td>Read to children</td>
<td>14</td>
</tr>
<tr>
<td>Add to to-do list</td>
<td>26</td>
<td>Find local businesses</td>
<td>13</td>
</tr>
<tr>
<td>Sports update</td>
<td>26</td>
<td>Order food</td>
<td>13</td>
</tr>
<tr>
<td>Add to shopping list</td>
<td>26</td>
<td>Lead a workout</td>
<td>12</td>
</tr>
<tr>
<td>Traffic</td>
<td>24</td>
<td>Order an item</td>
<td>10</td>
</tr>
<tr>
<td>Check/add to calendar</td>
<td>23</td>
<td>Flight information</td>
<td>10</td>
</tr>
</tbody>
</table>
Smart Speaker Owners

% Using Smart Speaker regularly for the following:

Using an average of 7.5 of these 28 task types regularly.
Listen to Podcasts:

Smart Speaker Owners: 70%
Non-Owners: 45%
How do you listen to audio most often?

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone/tablet</td>
<td>28%</td>
</tr>
<tr>
<td>AM/FM Radio</td>
<td>20%</td>
</tr>
<tr>
<td>Smart Speaker</td>
<td>18%</td>
</tr>
<tr>
<td>Speaker connected to smartphone</td>
<td>17%</td>
</tr>
<tr>
<td>Computer</td>
<td>8%</td>
</tr>
<tr>
<td>iPod/Mp3</td>
<td>7%</td>
</tr>
<tr>
<td>CD</td>
<td>2%</td>
</tr>
</tbody>
</table>
Listen to Internet Streaming sources:

Smart Speaker Owners: 94%
Non-Owners: 71%
Have a paid subscription to an Internet Audio service:

Smart Speaker Owners: 57%

Non-Owners: 37%
Smart Speaker Owners

**Strongly Agree/Agree:**

28%

How much do you agree/disagree...

“Getting your Smart Speaker led you to pay for a music service subscription”
Smart Speaker Owners

**Strongly Agree/Agree:**

70%

How much do you agree/disagree...

"You are listening to more audio since you got your Smart Speaker"
65% listening to more Music since getting speaker

28% listening to more News/Talk since getting speaker

20% listening to more Podcasts since getting speaker

18% listening to more Audiobooks since getting speaker
Those who listen to **Music** on a Smart Speaker

Median: 4 hours 15 mins

of music listening on a Smart Speaker in the typical week

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Those who listen to **News** on a Smart Speaker

Median: 1 hour 15 mins

of news listening on a Smart Speaker in the typical week

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Those who listen to **Podcasts** on a Smart Speaker

Median: 1 hour 22 mins

of podcast listening on a Smart Speaker in the typical week
29% of Smart Speaker Owners use the "Flash/News briefing" feature on their Smart Speakers.
Smart Speaker Owners

**Strongly Agree/Agree:**

72%

How much do you agree/disagree...

"You don’t know enough about your Smart Speaker to use all its features"
% using Smart home capabilities:

**Smart Speaker Owners**

- Home lighting, thermostat, appliances: 35%
- Home security: 34%
- Outdoor lighting/equipment, sprinklers: 20%
Have children in household:

- Smart Speaker Owners: 45%
- Non-Owners: 32%
Smart Speaker Owners With Children in Household

57% said entertaining children was a reason for wanting Smart Speaker
How much do you agree/disagree...

"The children in your household enjoy Alexa"

Smart Speaker Owners with children in household
Strongly Agree/Agree: 88%
Smart Speaker Owners with children in household

Strongly Agree/Agree: 80%

"[Alexa/Google Home] has made it easier to entertain the children in the household"

How much do you agree/disagree...
How much do you agree/disagree...

Smart Speaker Owners

**Strongly Agree/Agree:**

61%

"Having your Smart Speaker is like having someone to talk to"
How much do you agree/disagree...

"You have encouraged your friends to get a Smart Speaker"

Smart Speaker Owners
Strongly Agree/Agree:

69%
Reasons why you do not currently own a Smart Speaker:

- Smart speakers are too expensive: 60%
- You don’t know enough about the speakers yet: 48%
- You are worried you wouldn’t use it enough: 41%
- You worry that hackers could use it to access your home or personal info: 41%
- It bothers you that smart speakers are always listening: 36%
- You are worried you would spend more money with one: 35%
- You worry that it could allow the government to listen: 34%

Base: Non-owners who have expressed interest in owning a smart speaker

% saying reason
Non-Owners

How likely are you to purchase a Smart Speaker in the next six months?

- Very likely: 13%
- Somewhat likely: 41%
- Not at all likely: 46%
Smart Speakers...

...have quickly become essential to many owners

...encourage more audio listening

...make life easier, especially for parents
40% of Smart Speaker Owners say that their Smart Speakers have had an impact on their lives.
The SMART AUDIO Report