

# Smart Speakers Research – Q1 2018



Contact [info@delineate.agency](mailto:info@delineate.agency) for more information.

**delineate.**  
cut to the chase



now have a smart speaker





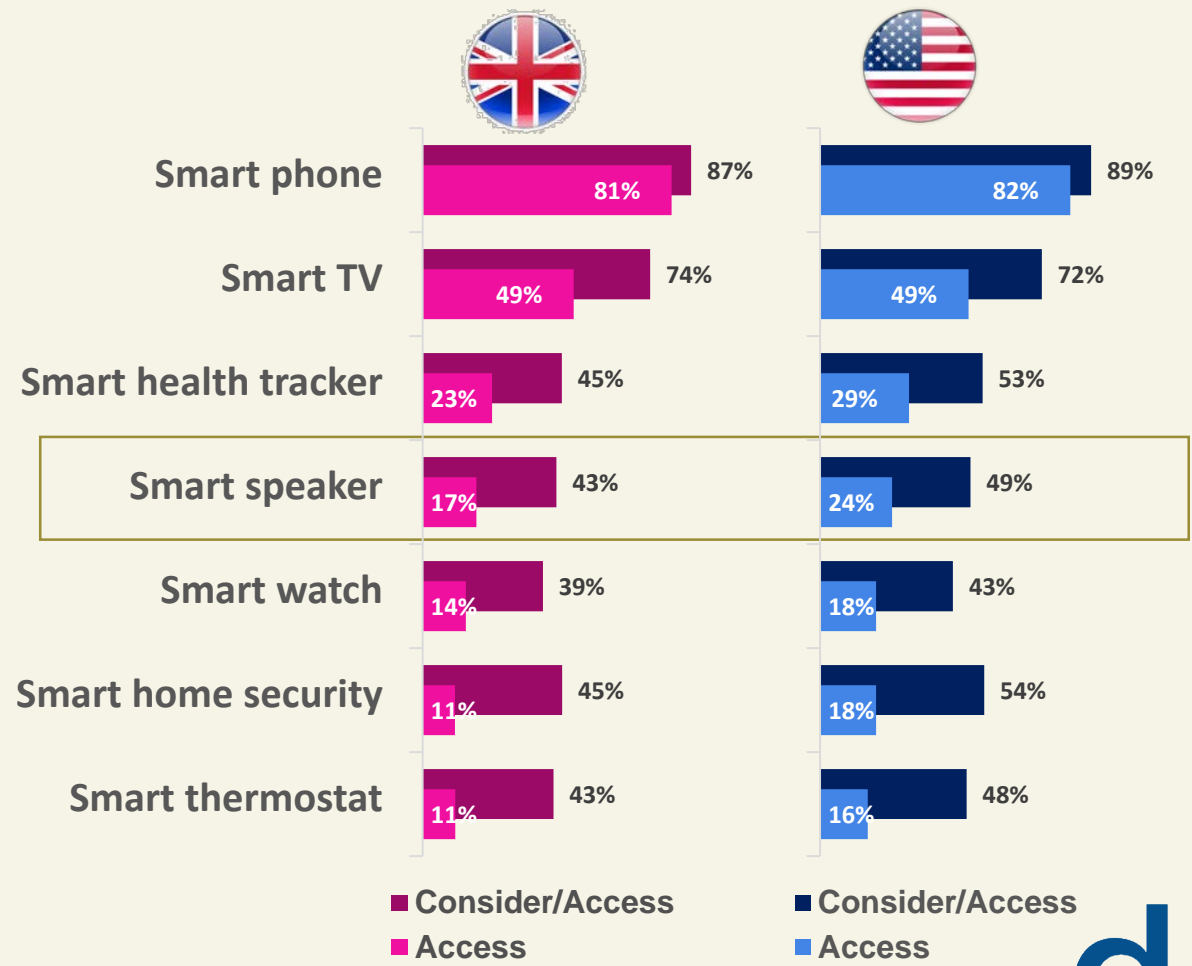
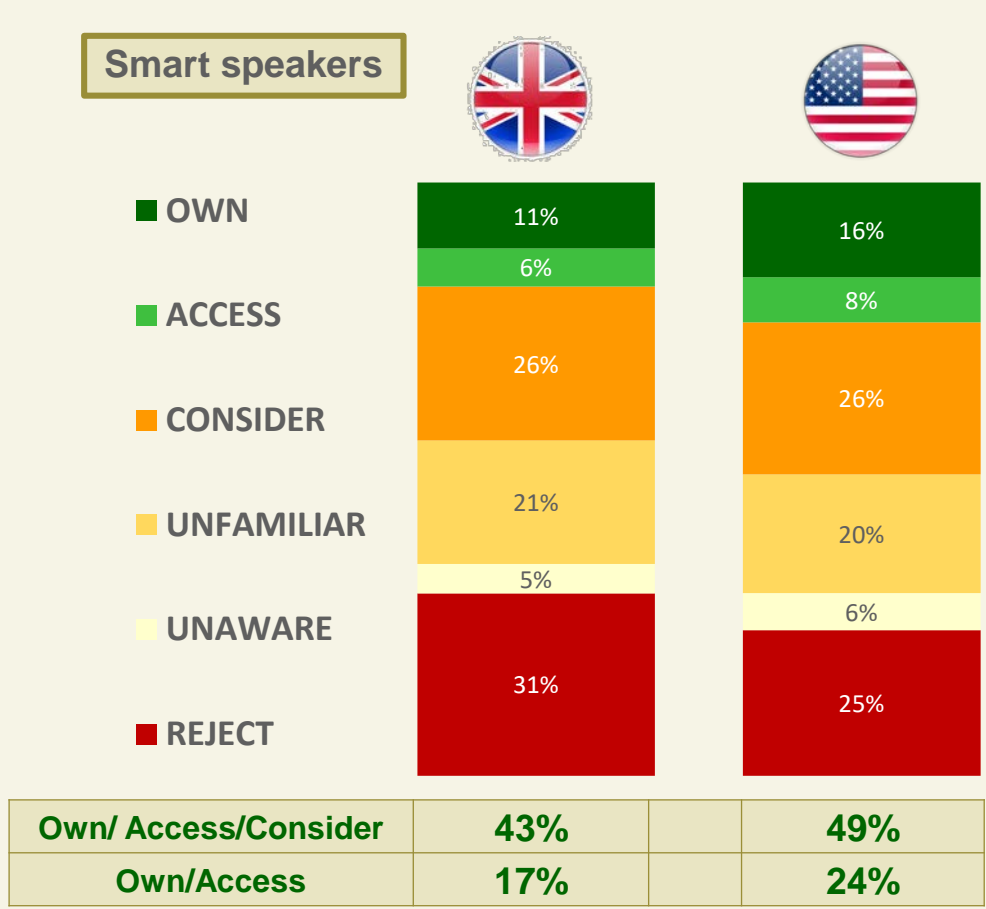
**are interested in  
getting one**



**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



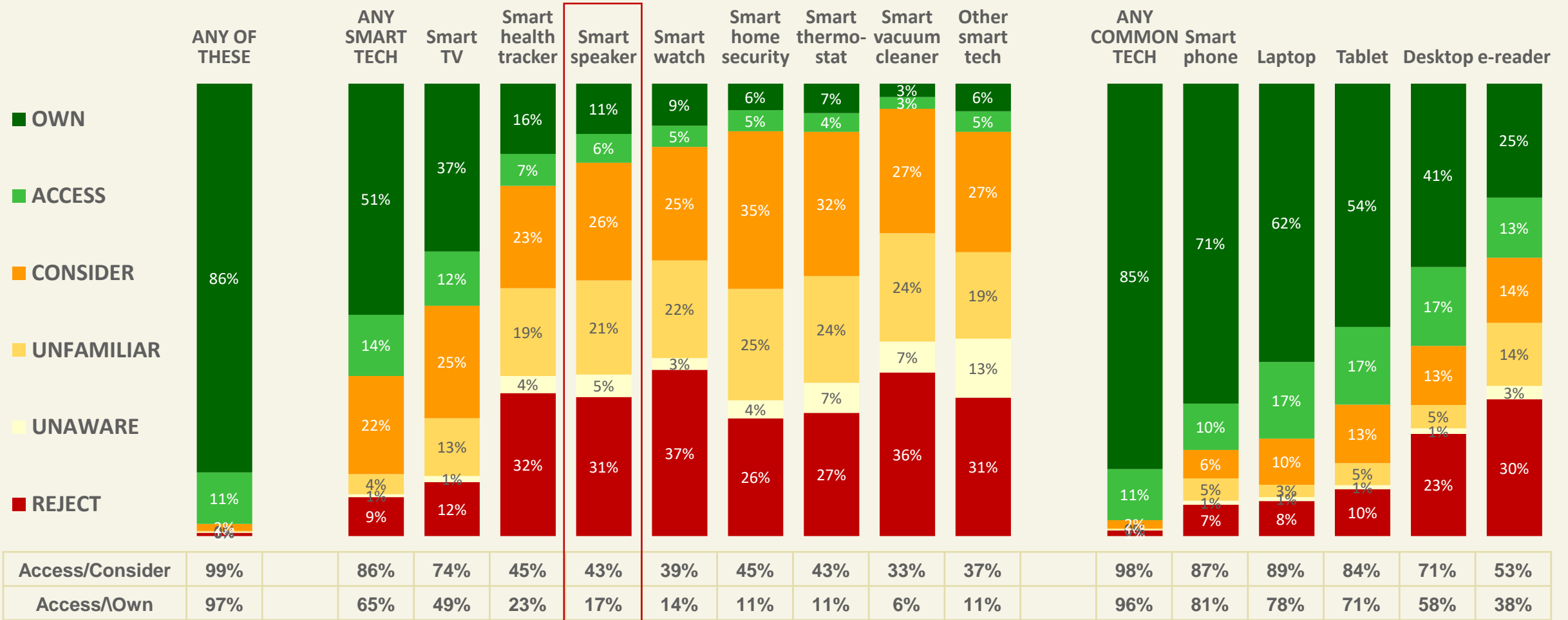
# One in six homes have a smart speaker; a further quarter are interested in getting one

- 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)



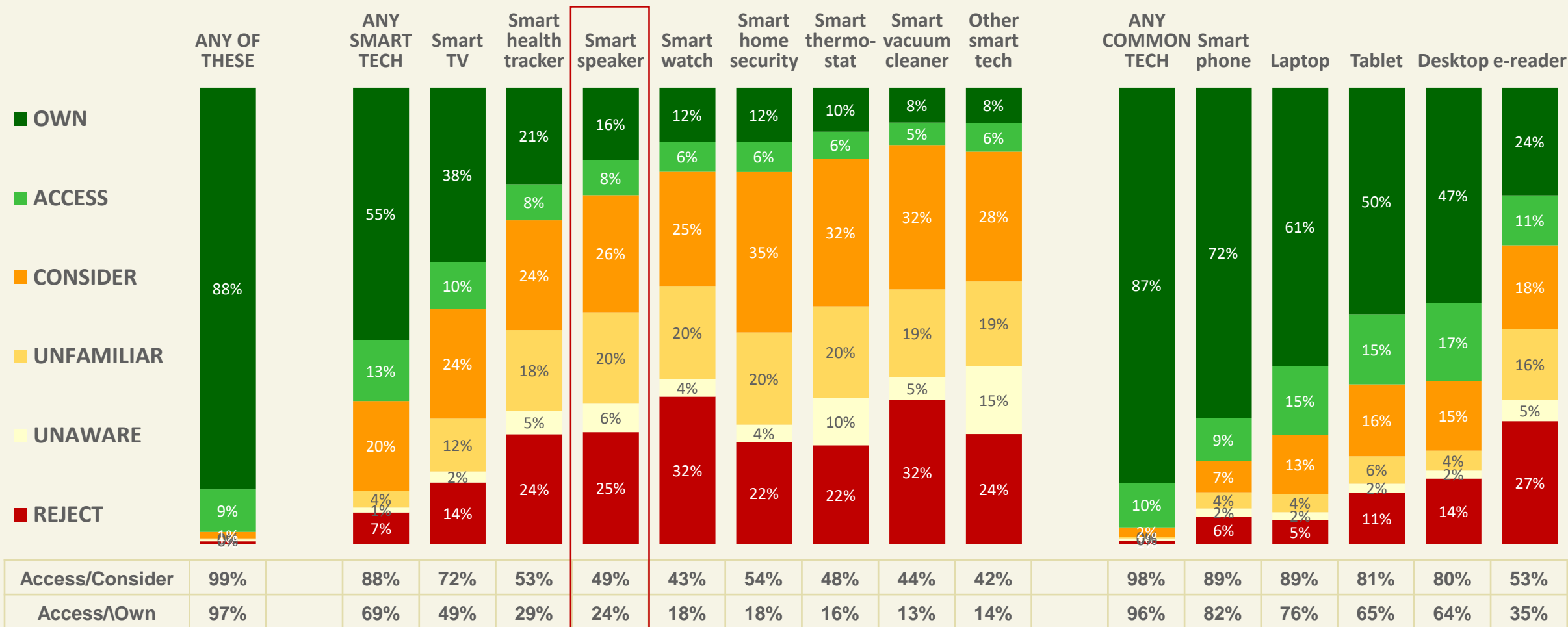
# One in four own/have access to a smart speaker; a further quarter are interested in getting one

- Virtually everyone (95%) has heard of them, but 1 in 5 don't know much about them

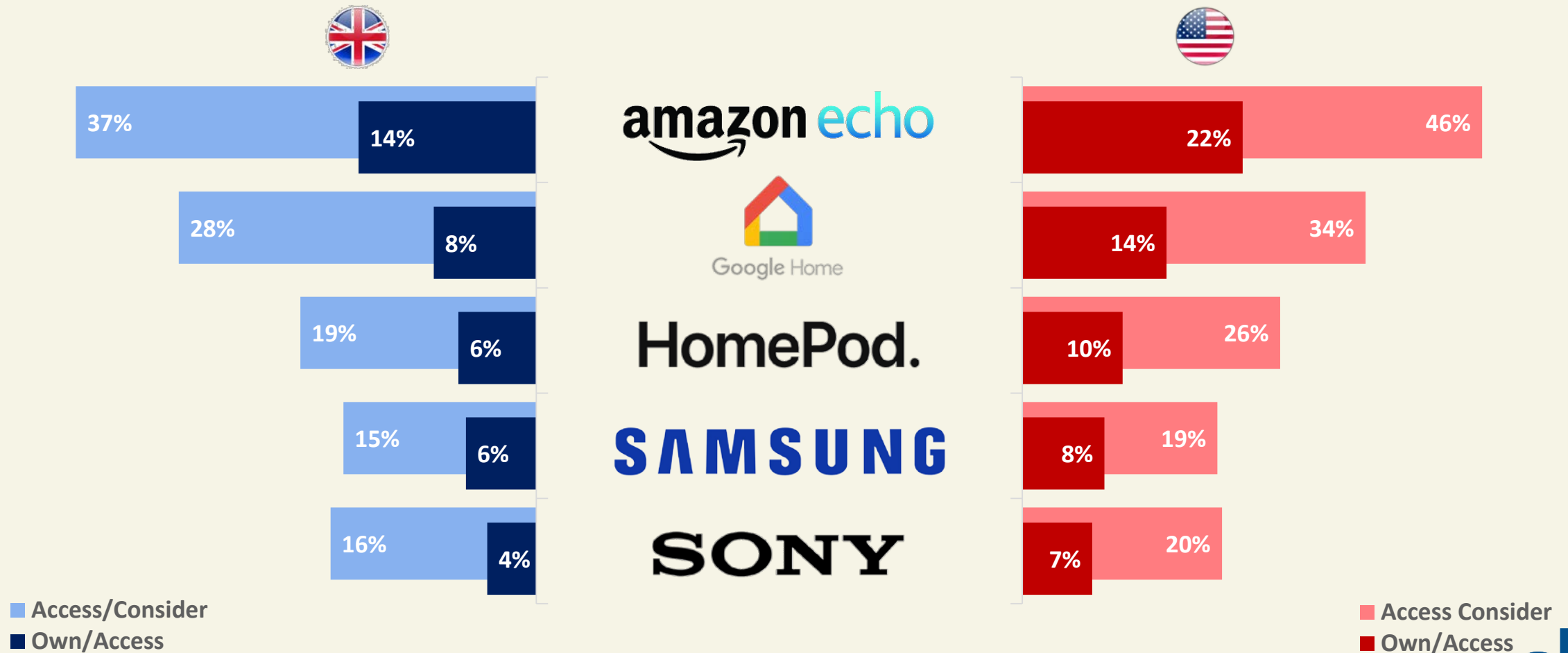
- a third reject the idea, in line with rejection of other smart tech, but only one in ten reject the idea of any smart tech



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



# Amazon is the clear leader but Google and Apple aren't far behind





# Smart speakers are starting to be used across a wide range of tasks

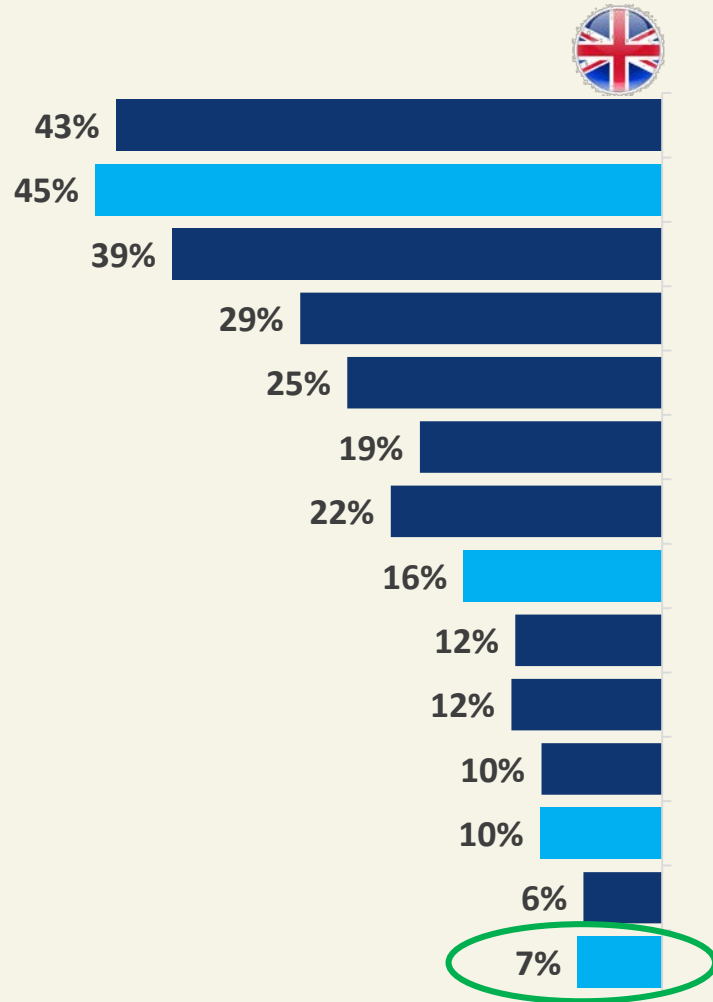


For each of the following activities, which of the following sources of information would you use to do that? (Q.M1)  
 - Internet searches via smartphone/computer // Searches via a smart speaker/home assistant  
 Base: Nationally representative sample of adults UK N=2009, US N=2007

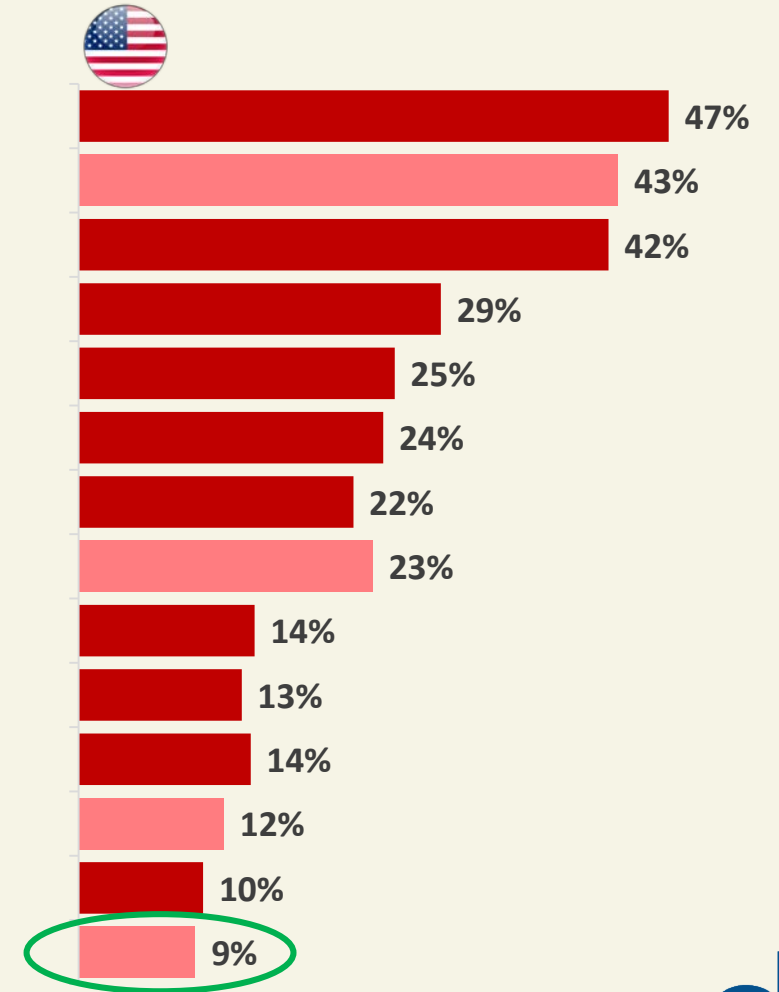


# What does this mean for Communicators?

Almost one in ten are already using smart speakers to help them decide on brands & products

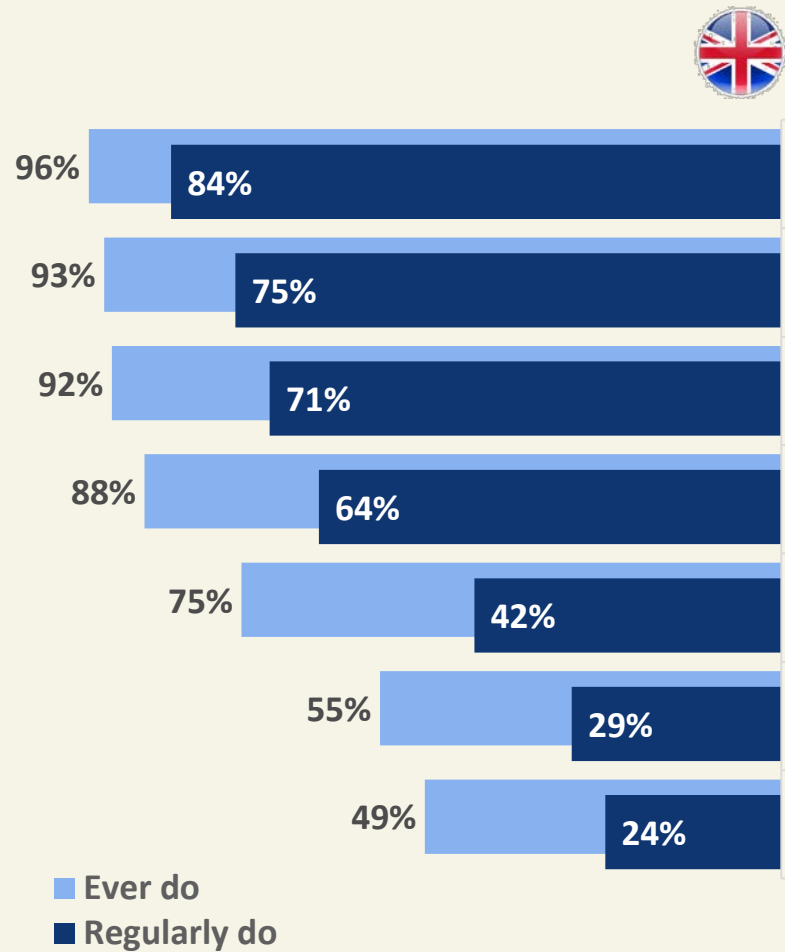


Word of mouth  
**Search (traditional)**  
 Ratings/Review websites  
 User reviews  
 Owned brand websites  
 Paid TV/Radio/Press ads  
 Earned press coverage  
**Earned social media**  
 Owned brand social  
 Independent blogs/vlogs  
 Paid online ads  
**Paid search**  
 Paid social posts  
**Smart speaker search**

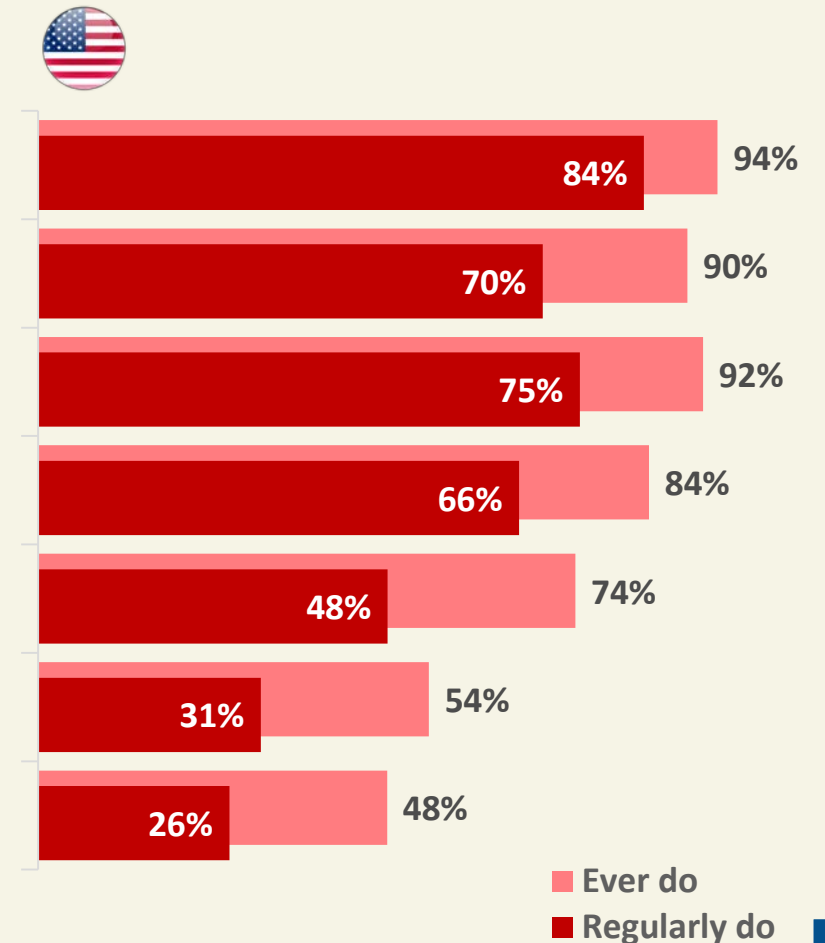


For each of the following activities, which of the following sources of information would you use to do that? (Q.M1)  
 - To help you decide which brand or product to buy/use  
 Base: Nationally representative sample of adults UK N=2009, US N=2007

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

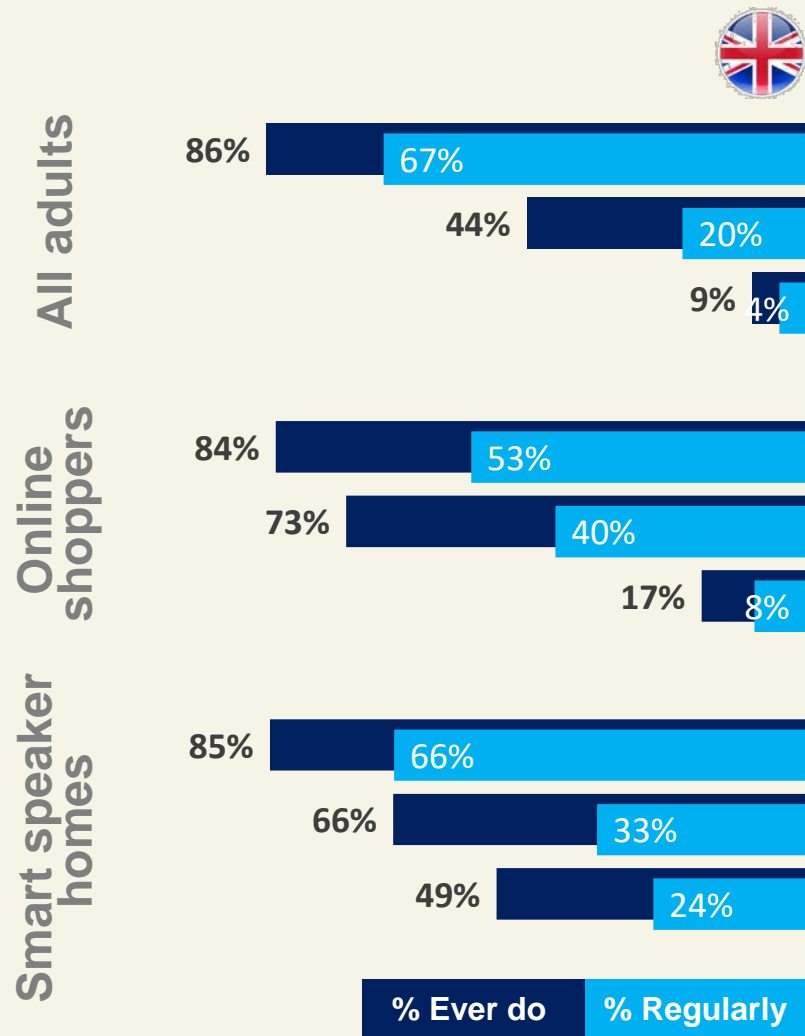


ANY OF THESE  
 Entertainment  
 Information  
 Organisation  
 Home/Device control  
 Shopping (Any)  
 Grocery shopping



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



Shop in-store  
Online (home delivery)  
Via smart speaker

Shop in-store  
Online (home delivery)  
Via smart speaker

Shop in-store  
Online (home delivery)  
Via smart speaker



Shop in-store  
Online (home delivery)  
Via smart speaker

71%	83%
9%	23%
7%	12%

Shop in-store  
Online (home delivery)  
Via smart speaker

62%	82%
20%	45%
13%	22%

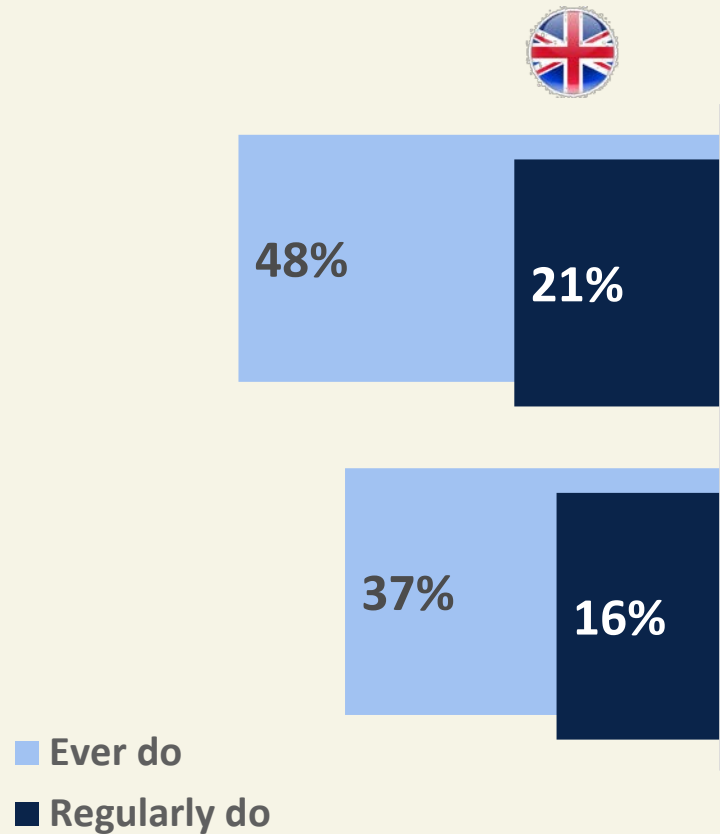
Shop in-store  
Online (home delivery)  
Via smart speaker

66%	83%
19%	40%
26%	48%

% Regularly % Ever do



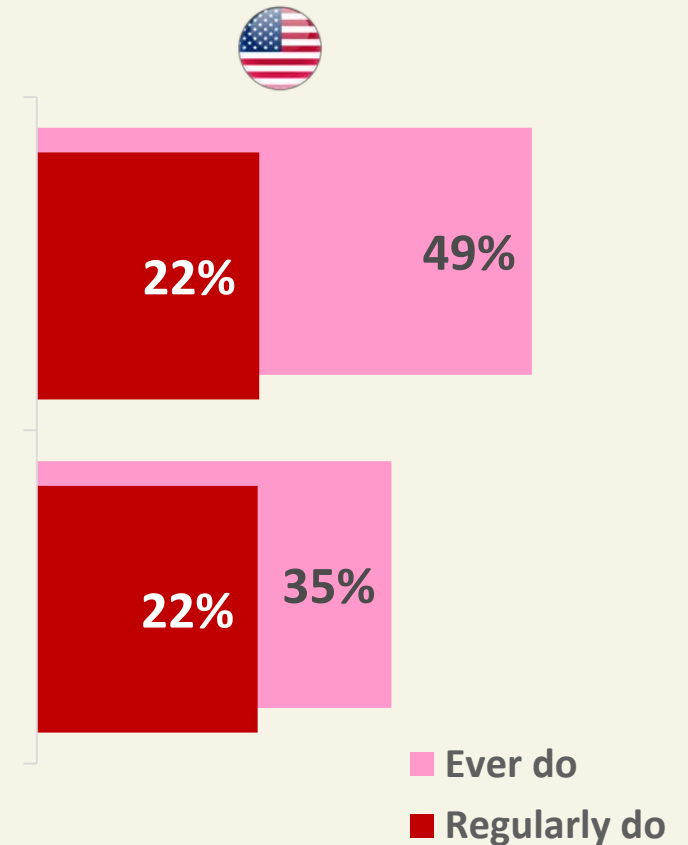
# Smart speaker homes are increasingly using their device to add to their shopping basket



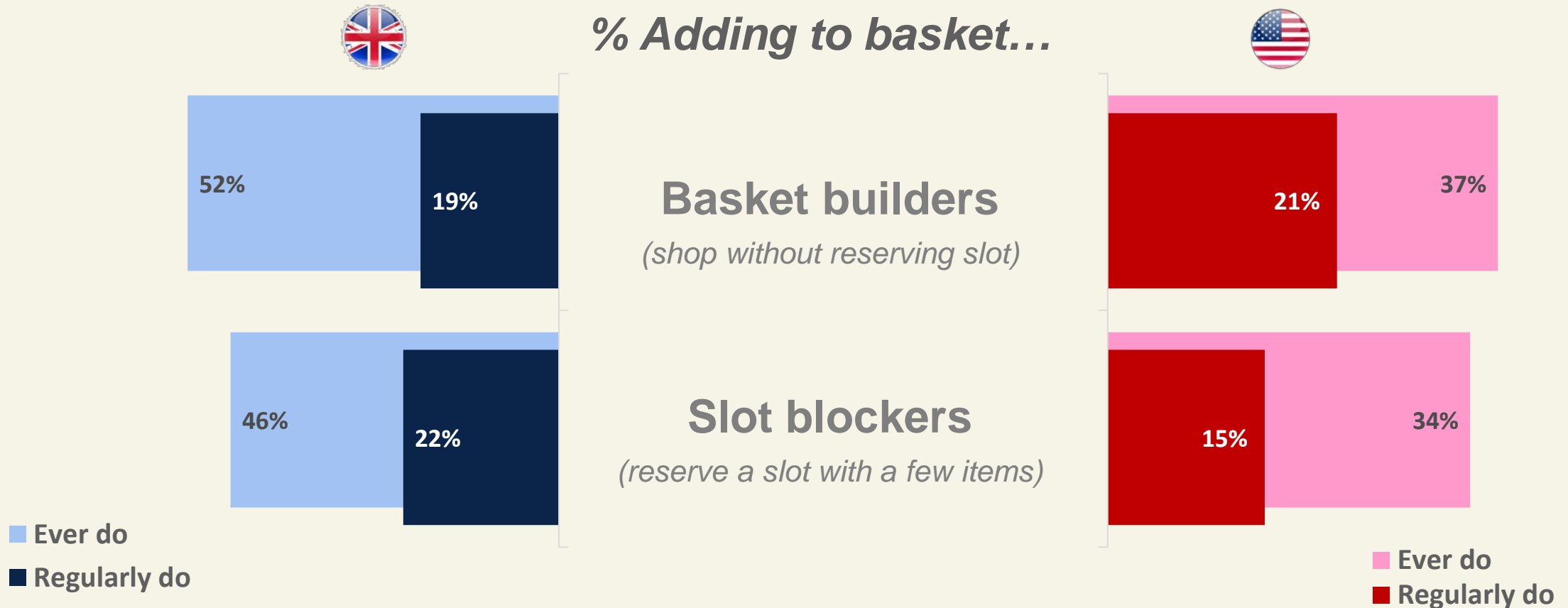
*% Adding to basket...*

Via computer/app among online shoppers

Via smart speaker among homes with one



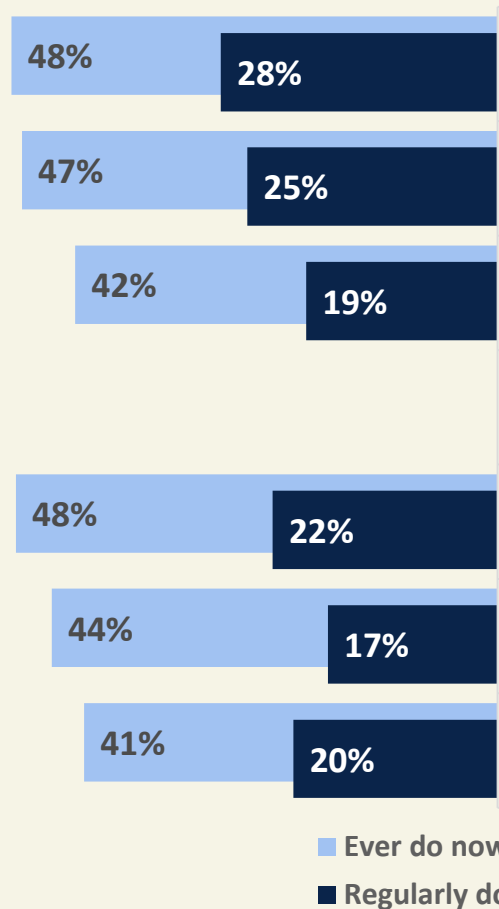
# And they fill their baskets in multiple ways, interactions can be ad-hoc or planned



# Smart speakers aren't just for re-ordering brands on the regular shopping list but also for discovering & buying new brands

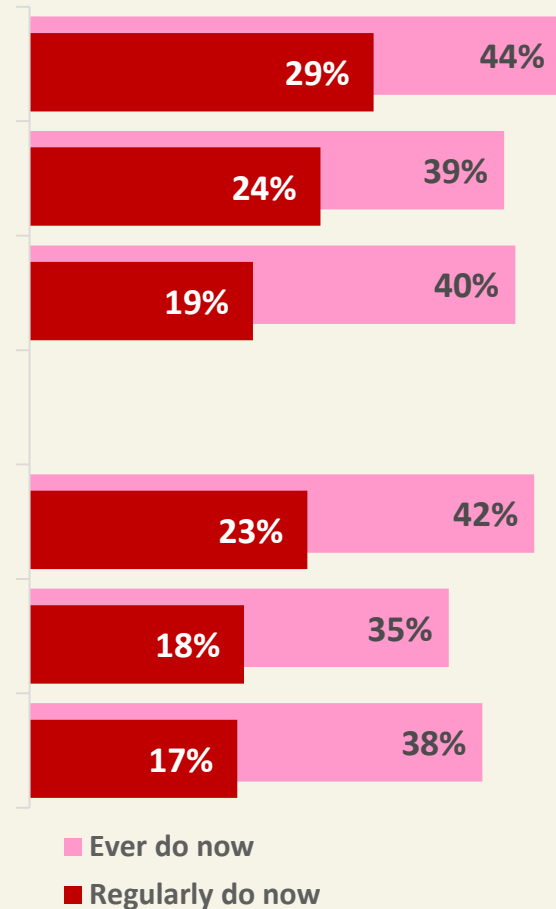


Using a smart speaker to shop



Any re-ordering  
Groceries  
Toiletries

Any 1<sup>st</sup> time buying  
Groceries  
Toiletries



# 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



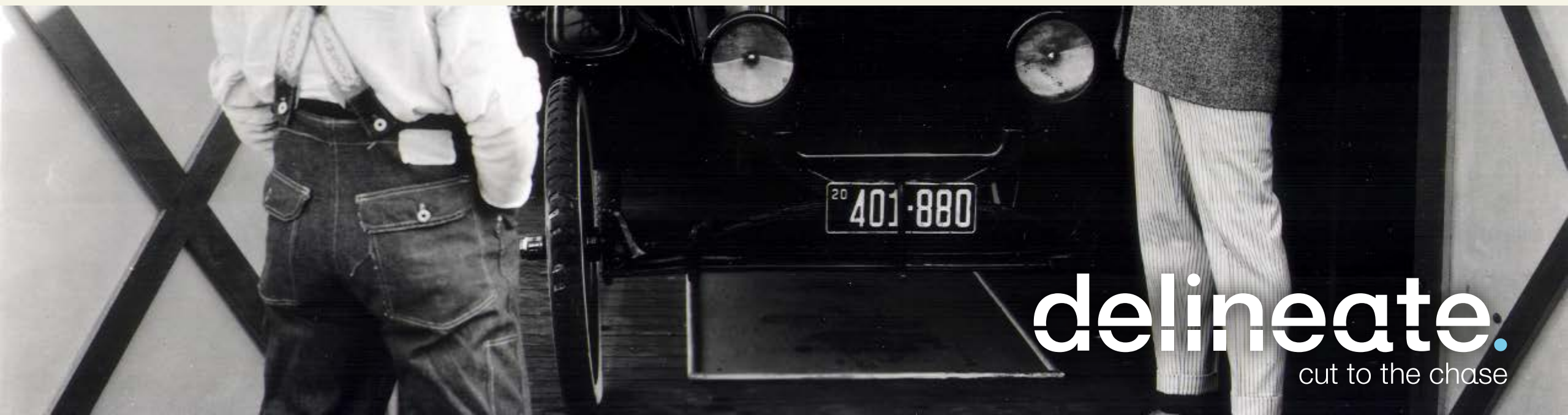
# Methodology

- 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.

## Methodology



## About delineate



**delineate.**  
cut to the chase

# Our brand story



- 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!

**delineate - helping clients cut to the chase**

# 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

## How we help communicators

# Contact details

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**Get in touch**

