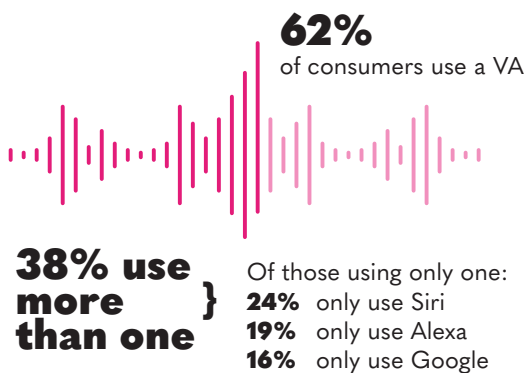


Understanding the 2020 Digital Voice Assistant Opportunity



Consumers are increasing their use of voice assistants, through both smartphones and smart speakers, across a range of activities. Several of these digital audio uses, such as asking questions (Hey Google, what's the weather?), shopping and purchasing, offer brands the opportunity to build out actions (on Google products) or skills (on Alexa products). Few actions or skills have been created thus far, and for 2020, our SEO team recommends that brands act now to have an early mover advantage. A new way to engage with consumers, these search tactics are a promising complement to robust search and digital audio strategies.

CONSUMERS ARE LISTENING UP



SOUNDING (GENERALLY) POSITIVE

Across all generations, consumers associate digital voice assistants with **fun**

- **71% of all consumers say that they are fun to use**
- 35-44-year-olds agree the most, at 75%
- Gen Z may prefer a more visual approach as they agree the least, at 67%
- Yet consumers are **just as concerned about privacy**; 71% note fear that companies are listening in on their conversations

THE WHO AND THE HOW: HIGHLIGHTS

80% of digital voice assistant users have employed their smartphone as a VA

Users 55+ over index for use of smart speakers, at **51%**

86% of 18-34-year-olds have used the VA on their smartphone, making them the highest user group to have done so

THE BIGGEST BITE OF THE MARKET



VS

amazon

33% of consumers report using Siri most

a slight edge over Amazon's Alexa at **31%**


Apple's advantage is due to smartphone ownership

That said, Amazon Echo products have seen tremendous sales on Prime Day/BFCM for multiple years now, a pattern likely to propel Alexa to the lead position in the VA space


Alexa already dominates the smart speaker market, with **27%** of smart speaker owners having an Alexa. Google Home is second, at **18%**

WHAT THEY'RE TUNING INTO

Smart speaker users engage in the following activities:

 **79.8%** Audio listening (music, podcasts, audio books, the radio, news, etc)

 **73%** Inquiries

 **40%** Shopping (searching for products)

 **34.5%** Smart-home control

 **27%** Buying



THE EVER-INFLUENTIAL DOLLAR

Despite well-priced options (the Amazon Echo Dot retailed for \$22 on Cyber Monday) there is still a discrepancy in smart speaker ownership between low- and higher-income households

- 70% of 18-34-year-olds with a HHI of \$75K+ own one, as opposed to the same age group with a HHI less than \$75K