

# Beyond the Smart Speaker

## Voice Assistant Adoption Phase 2



# Research, News, Voice Insider, Podcasts



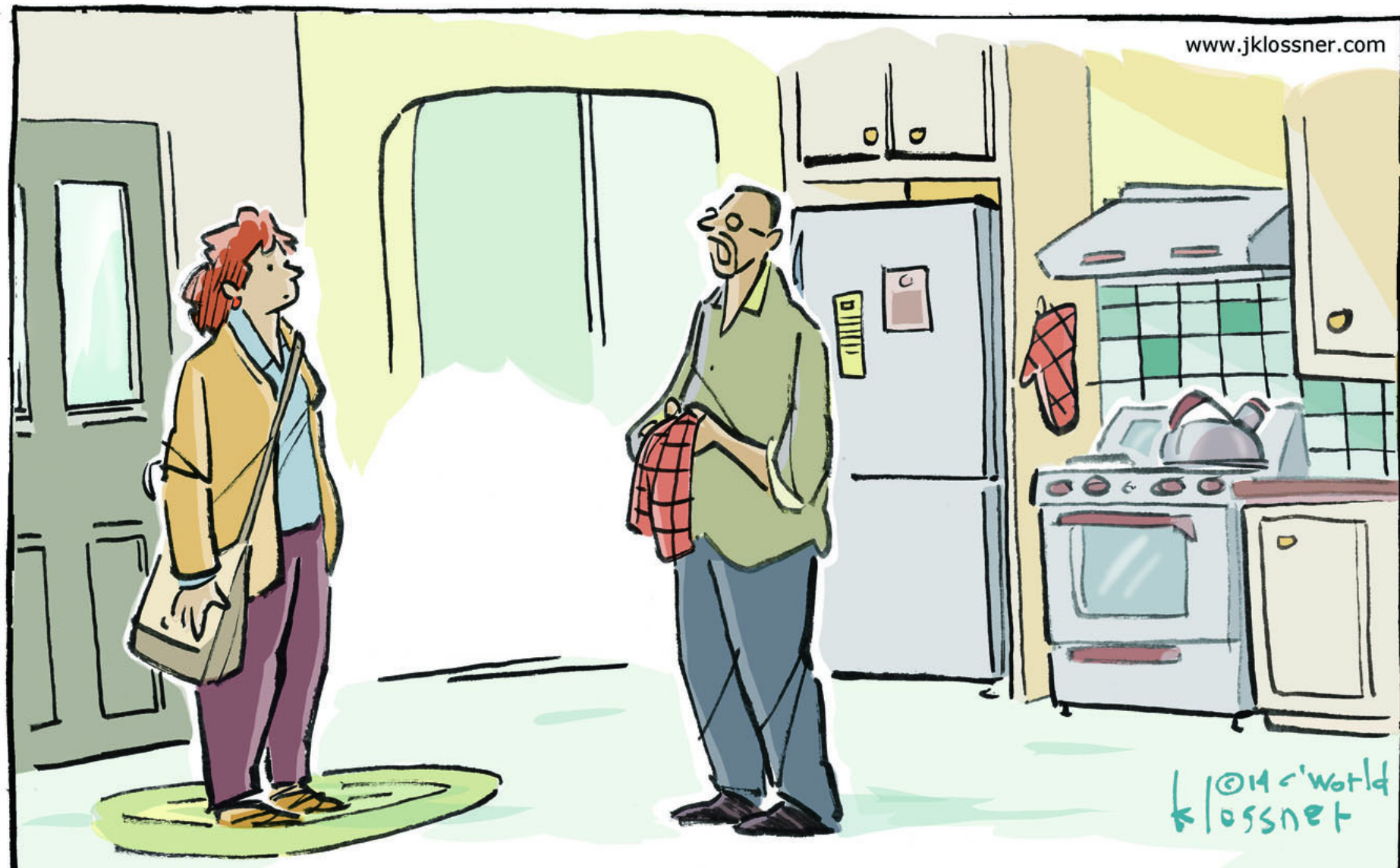












" WE HAVE TO GO OUT FOR DINNER. THE REFRIGERATOR ISN'T SPEAKING TO THE STOVE."







Ο ΠΕΡΙΚΛΗΣ ΑΓΟΡΕΥΩΝ ΑΠΟ ΤΗΣ ΠΛΗΚΟΣ









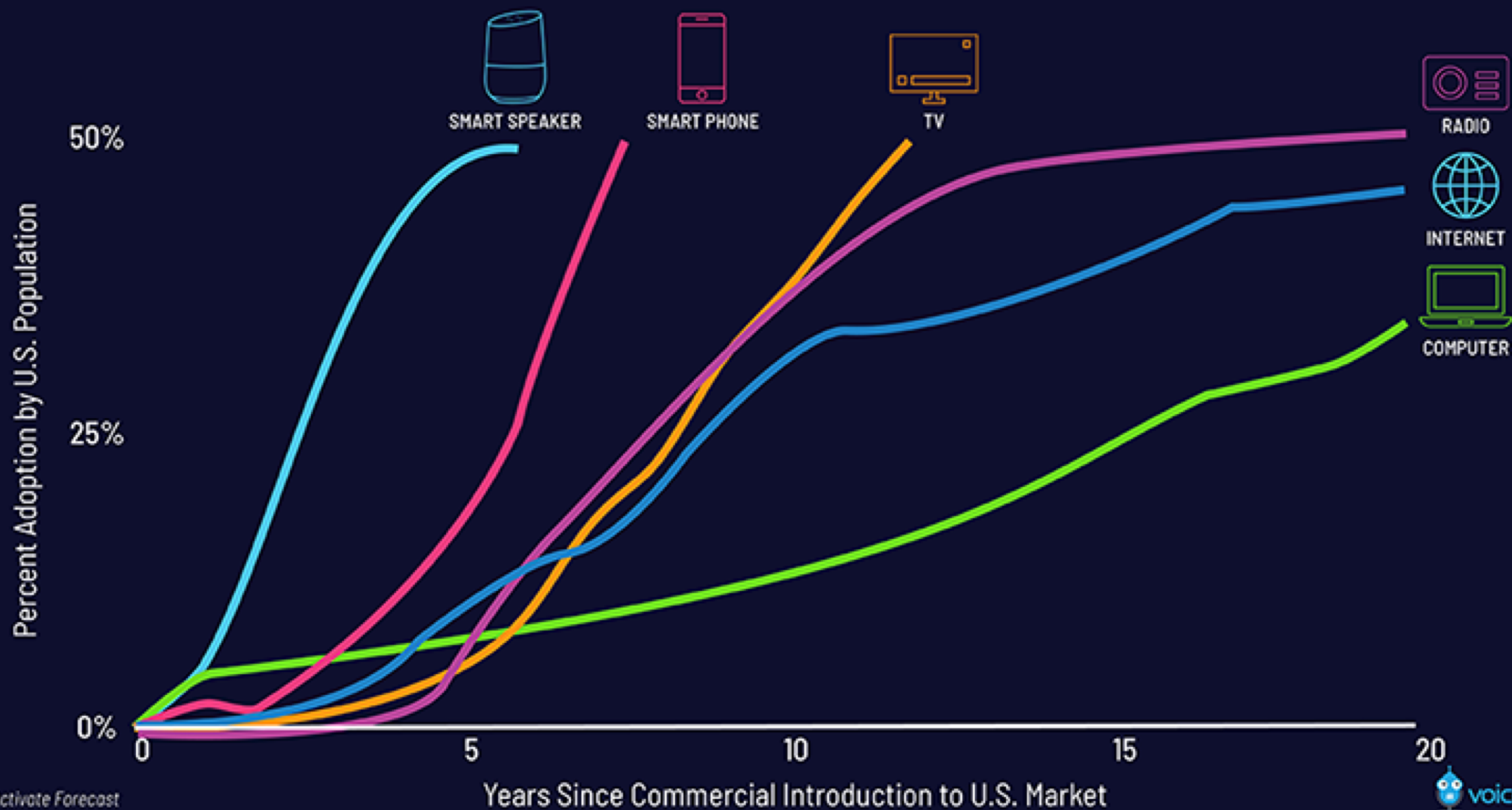






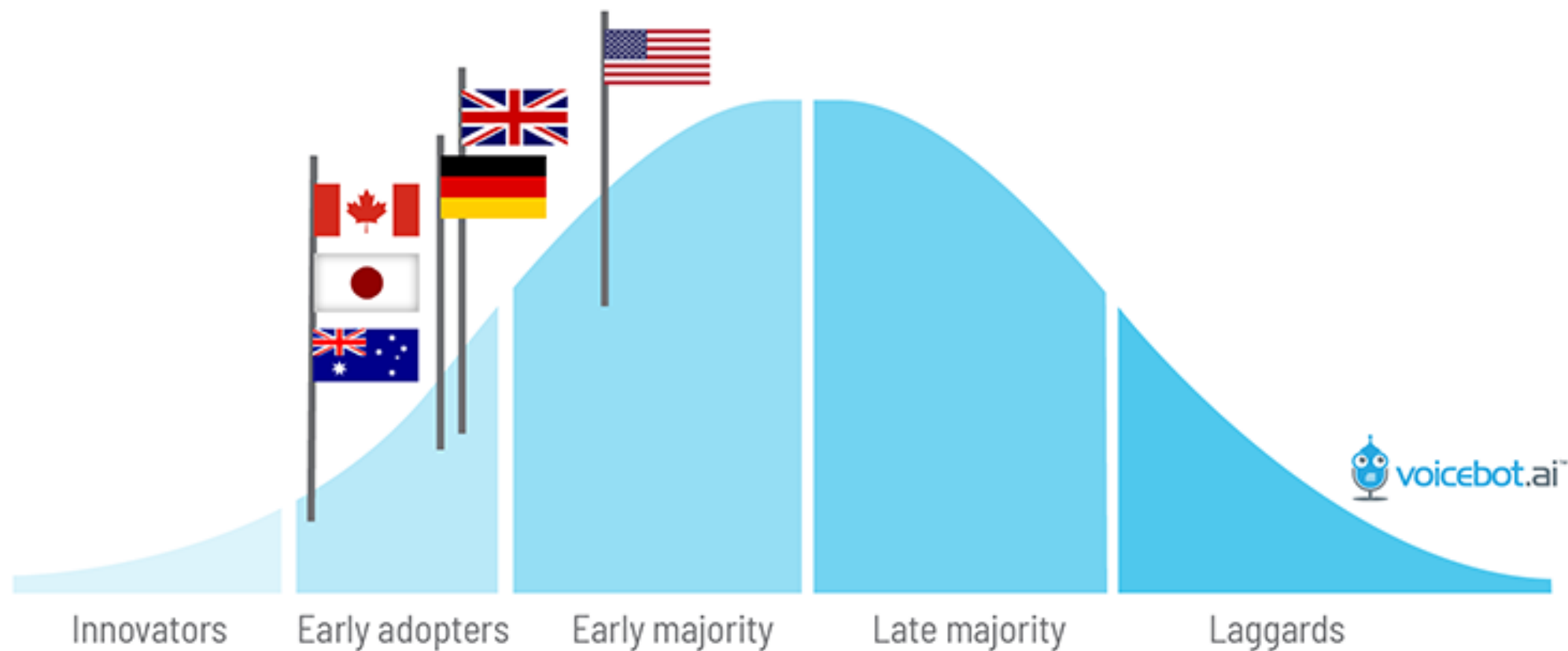


# Smart Speaker Penetration, U.S., Years from Inception, % Population





# Smart Speaker Technology Adoption by Country



The image shows three smart speakers on a wooden surface. On the left is a white Amazon Echo with a yellow top ring. In the center is a white Google Home with a colorful top ring. On the right is a black Harman/Kardon speaker with a mesh grille. The background is a soft, out-of-focus indoor setting. The entire image has a semi-transparent purple overlay.

# Speakers Were Important

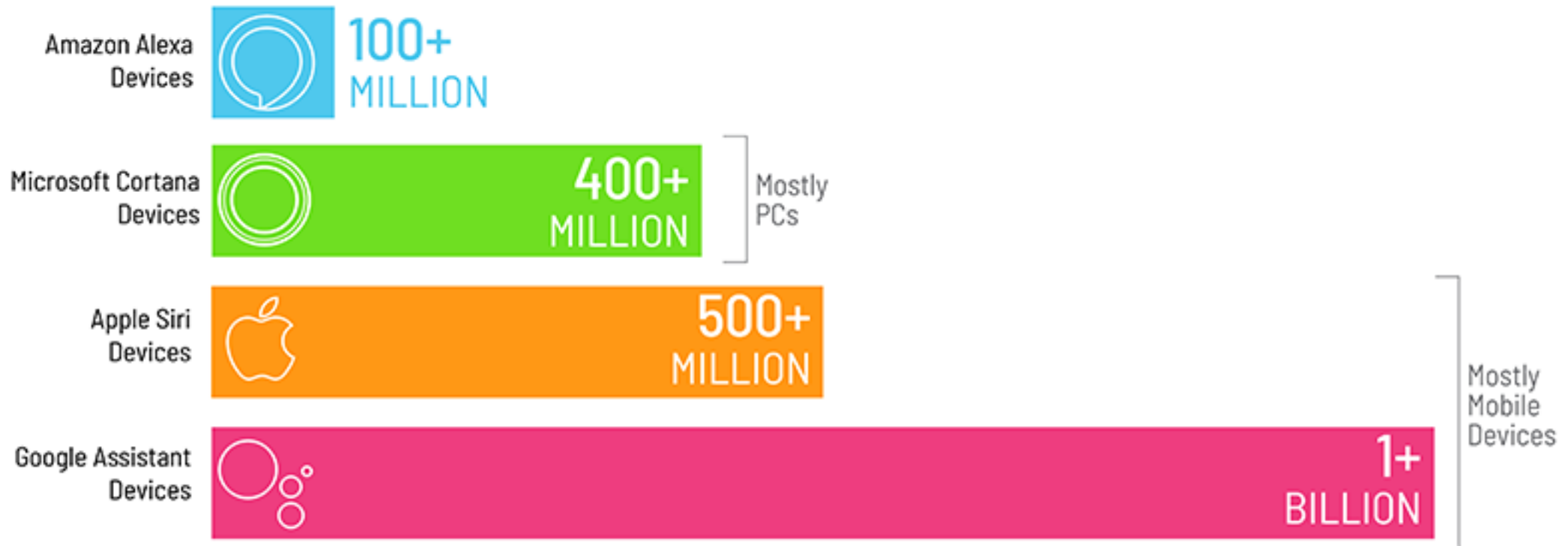
But, voice cannot be contained

# So Much More Than Speakers



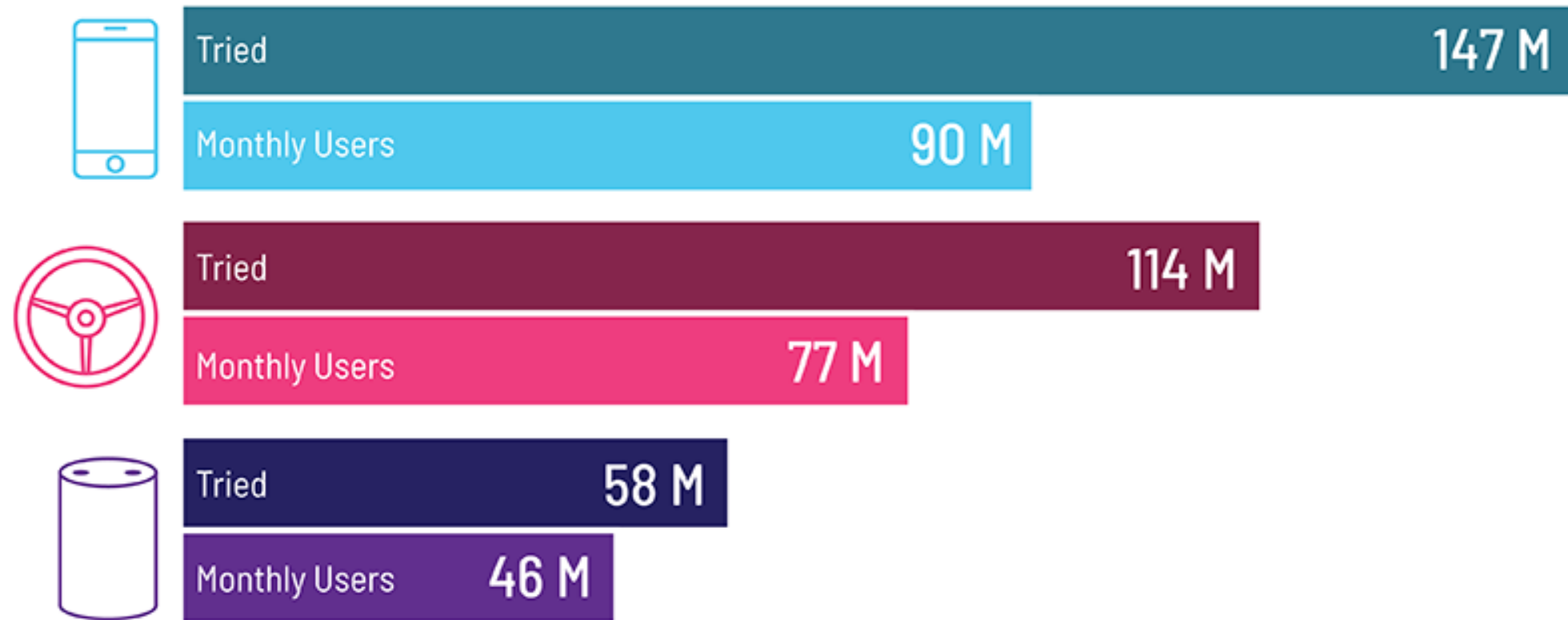


# Voice Assistant Reach by Vendor



Source: Canals, Amazon, Microsoft, Google, Apple

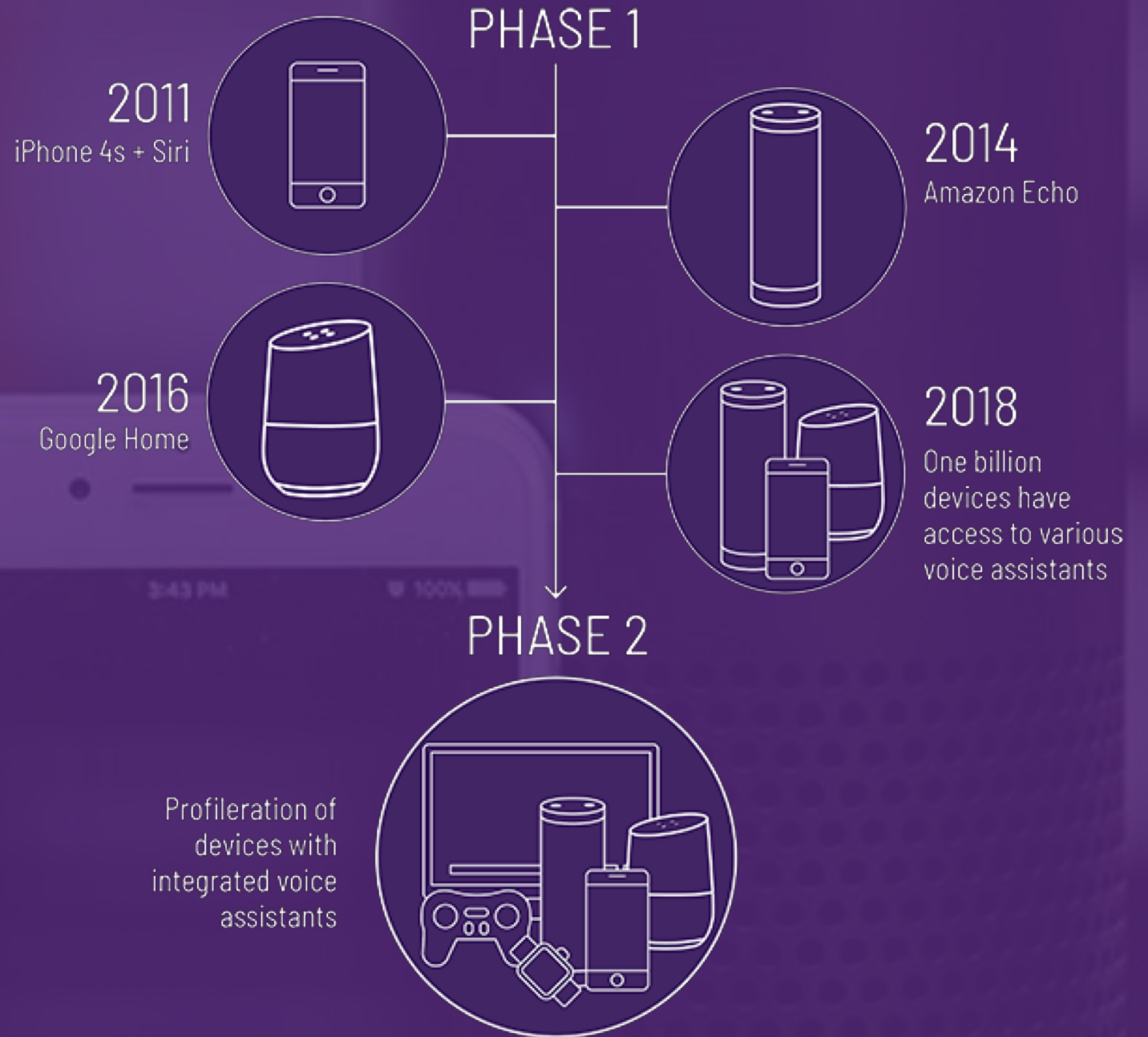
# Voice Assistant Surface Warfare



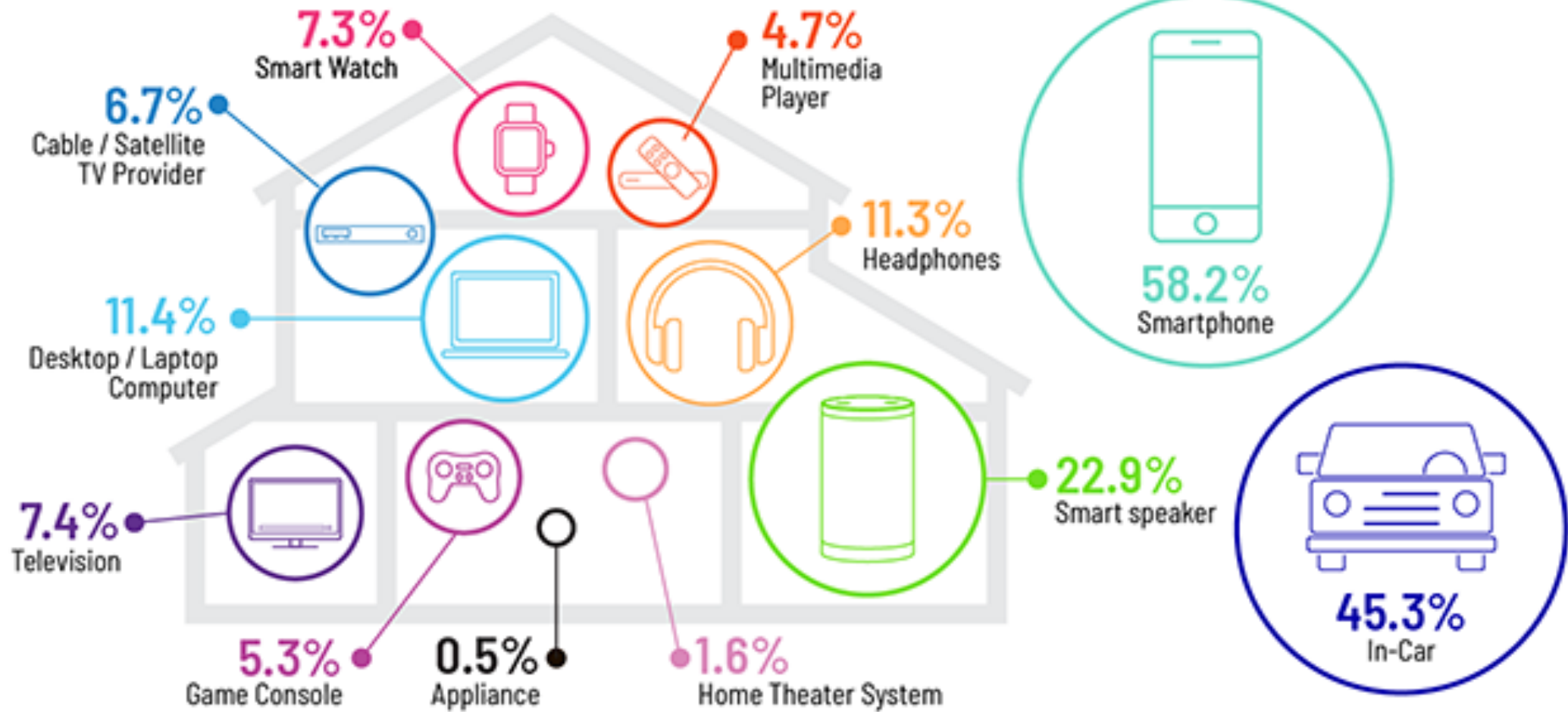
U.S. Adults, September 2018



# Phase 1 is Over



# Phase 2 – Voice Assistants Gone Wild







# More than Surface Differences



# Surfaces Have Different Use Case Priorities





# Top 5 Use Cases by Surface

## SMART SPEAKER

Ask a question



Listen to streaming music service



Check the weather



Set a timer



Listen to radio



## SMARTPHONE

Ask a general question



Traffic or directions



Call someone



Send a text or email



Find a place to eat



## CAR

Call someone



Ask for directions



Sent a text














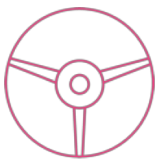
Start playing music



Ask about restaurants



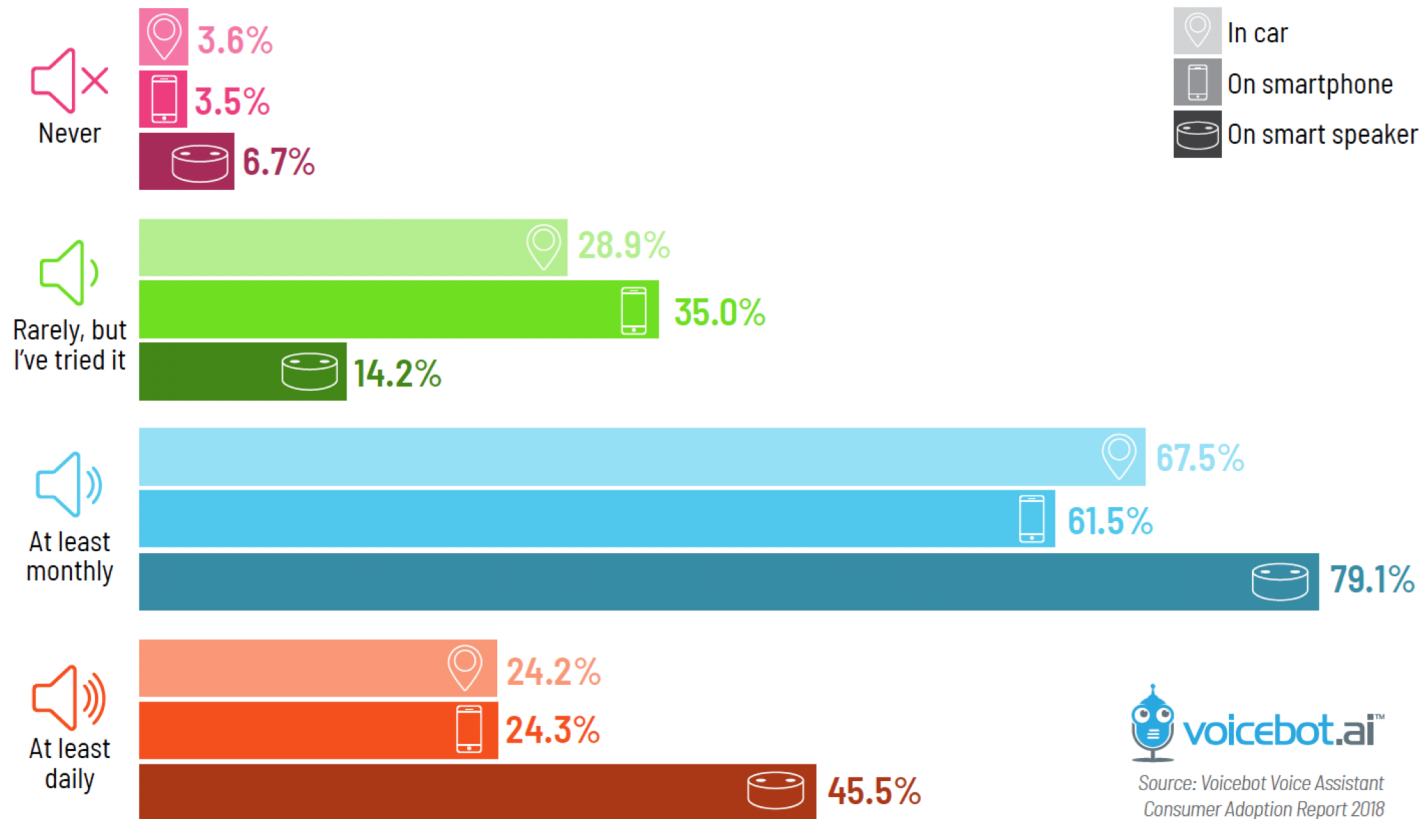
# Contrasting Use Cases

									
	1	2	3	4	5	11	12	16	N/A
	1	9	N/A	7	13	2	3	4	5
	N/A	4	N/A	N/A	6	2	1	3	5




# Different Frequency of Use

## Voice Assistant Use Frequency by Device



Source: Voicebot Voice Assistant Consumer Adoption Report 2018

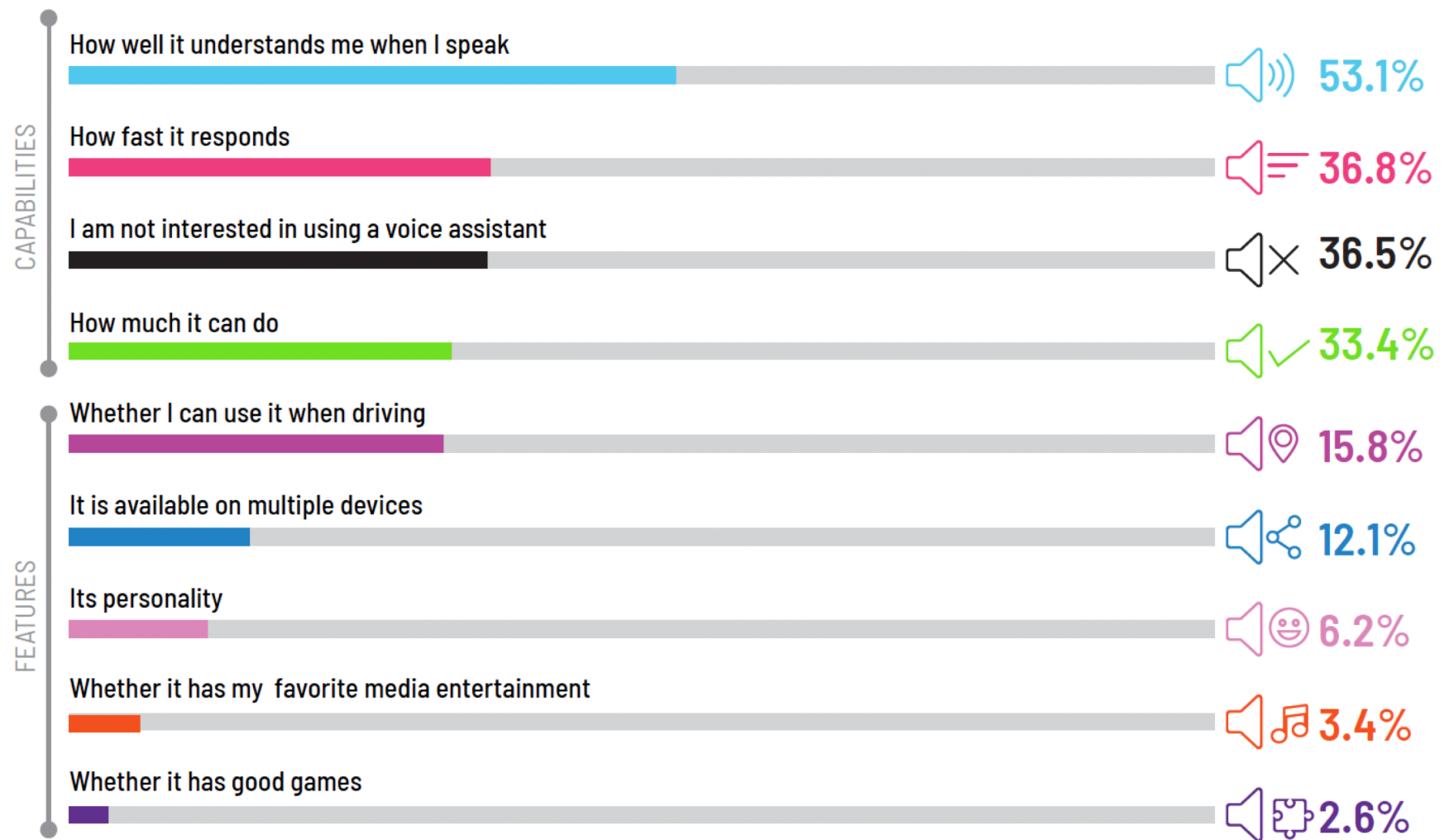
A group of diverse people are gathered around a table filled with various dishes, including bread, bowls of food, and a bottle of olive oil. The scene is overlaid with a semi-transparent blue grid pattern. The text 'What Consumers Say' is centered in white.

# What Consumers Say



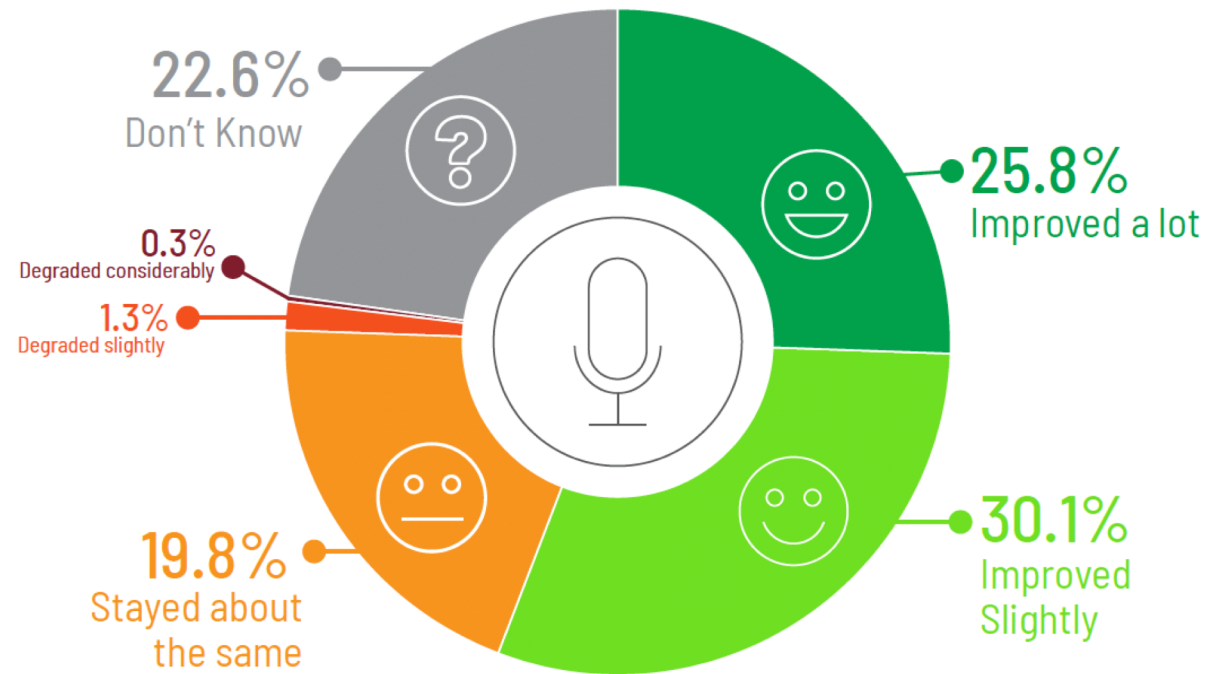
# What Users Want

## Most Important Qualities of a Voice Assistant



# Voice Assistants are Getting Better

In the past 2 years, have smartphone voice assistants...





# Phase 1 vs. Phase 2

# Phase 1 – Introduction & Reach

## Make Voice an Option

- Introduce Voice UI
- Localize for Language
- Distribute Globally

## Expand Voice Access

- Introduce New Devices
- Add to Existing Devices
- Go Broad on Features



# Phase 2 – Habituation & Specialization

## Habituate

- Move Use Cases to Voice
- Create New Use Cases
- Decouple Voice from Devices

## Specialize

- Create Purpose-built Devices
- Customize Voice for Devices
- Add Feature Depth

# Where we are Headed

## The Reactive Assistant will Evolve

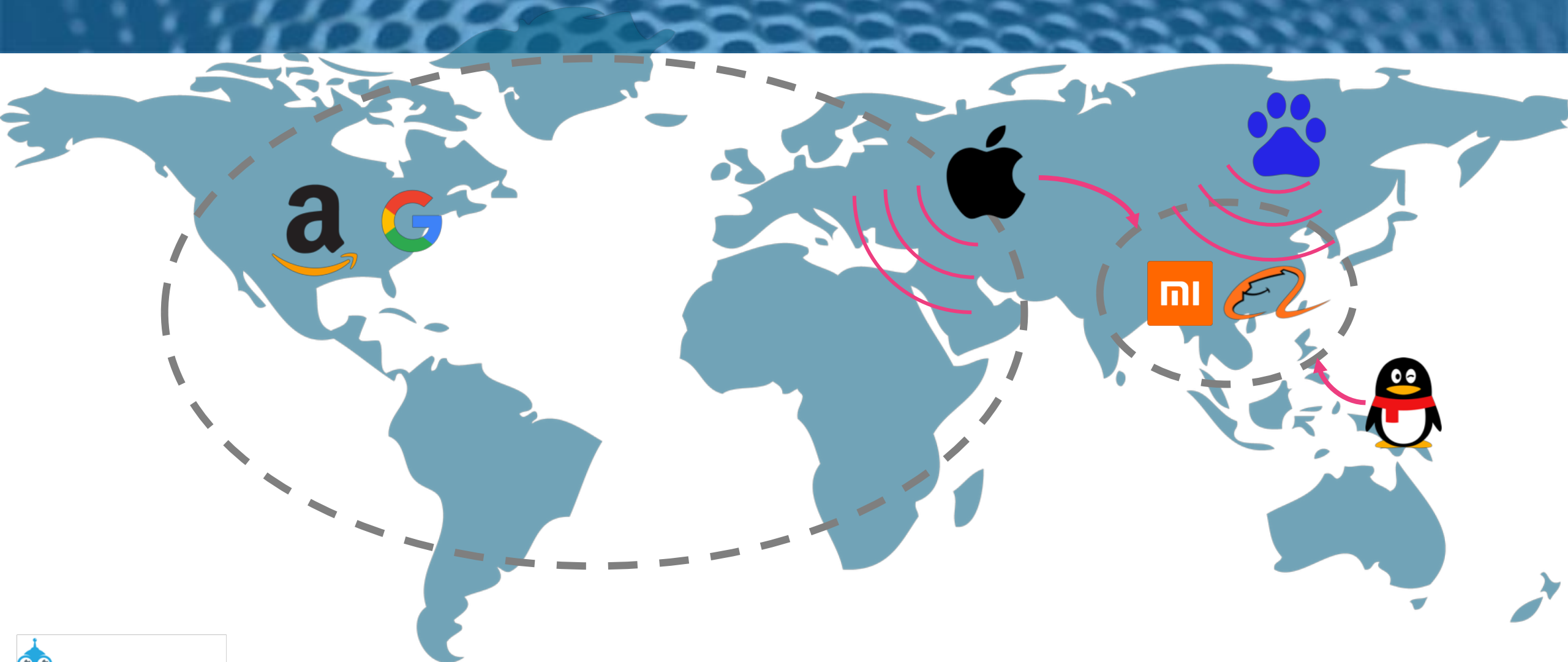
- Context Free → Context First
- Undifferentiated Interactions → Adaptive interactions

## The Proactive Assistant will Emerge

- Request-response → Publish-Subscribe
- Gofer → Agent



# The Duopolies are Tested in 2019 / 2020



# More Resources from Voicebot

## REPORTS



In-Car Voice Assistant Consumer Adoption Report



Voice Assistant Consumer Adoption Report



Smart Speaker Consumer Adoption Report



Voice UX Best Practices Ebook



Voice Shopping Consumer Adoption Report

## LISTEN TO VB



## SOCIAL



@bretkinsella  
@voicebotai



Voice AI Group

## SUBSCRIPTION NEWSLETTER

**VOICEINSIDER**



The image features three smart speakers arranged on a wooden surface against a purple background. On the left is a white Amazon Echo with a yellow top ring. In the center is a white Google Home with a colorful top ring. On the right is a tall, dark grey Harman/Kardon speaker with a black base. The text 'Voicebot.ai' and '@bretkinsella' is overlaid in white in the center of the image.

# Voicebot.ai

@bretkinsella

voicebot.ai