Research, News, Voice Insider, Podcasts

Ο ΠΕΡΙΚΛΗΣ ΑΓΟΡΕΥΩΝ ΑΠΟ ΤΗΣ ΠΝΥΚΟΣ

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

Source: Activate Forecast

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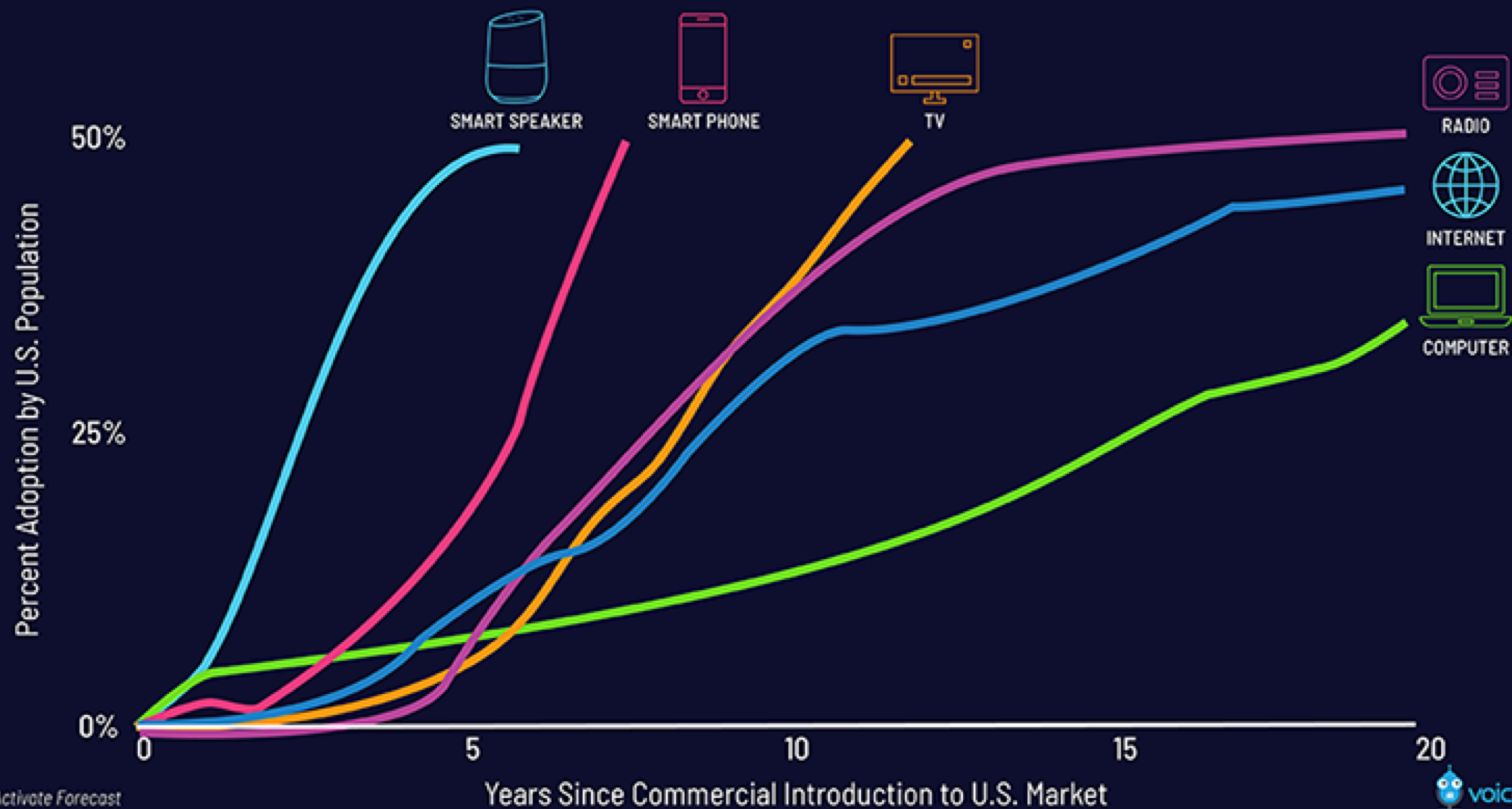
Smart Speaker Technology Adoption by Country

Innovators | Early adopters | Early majority | Late majority | Laggards
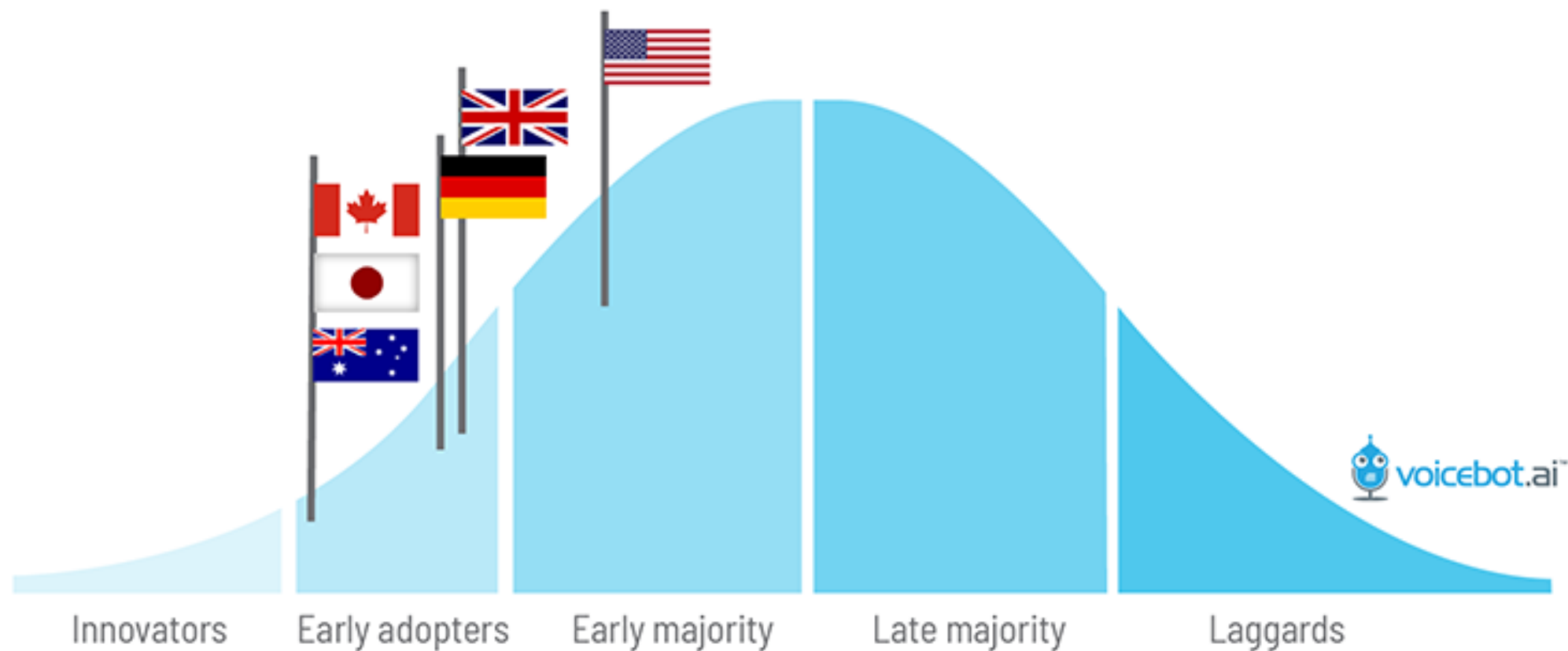
Speakers Were Important

But, voice cannot be contained

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So Much More Than Speakers

Voice Assistant Reach by Vendor

Amazon Alexa Devices — 100+ MILLION

Microsoft Cortana Devices — 400+ MILLION — Mostly PCs

Apple Siri Devices — 500+ MILLION

Google Assistant Devices — 1+ BILLION

Mostly Mobile Devices
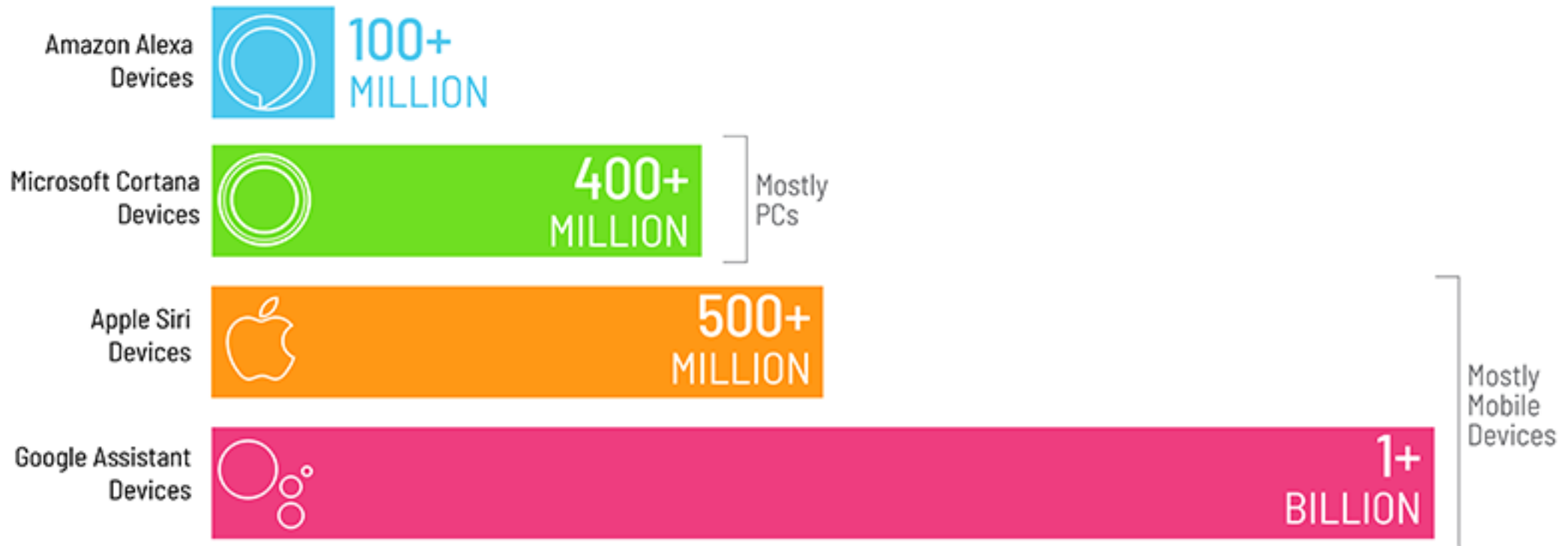
Source: Canalys, Amazon, Microsoft, Google, Apple

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Voice Assistant Surface Warfare

Tried 147 M

Monthly Users 90 M

Tried 114 M

Monthly Users 77 M

Tried 58 M

Monthly Users 46 M
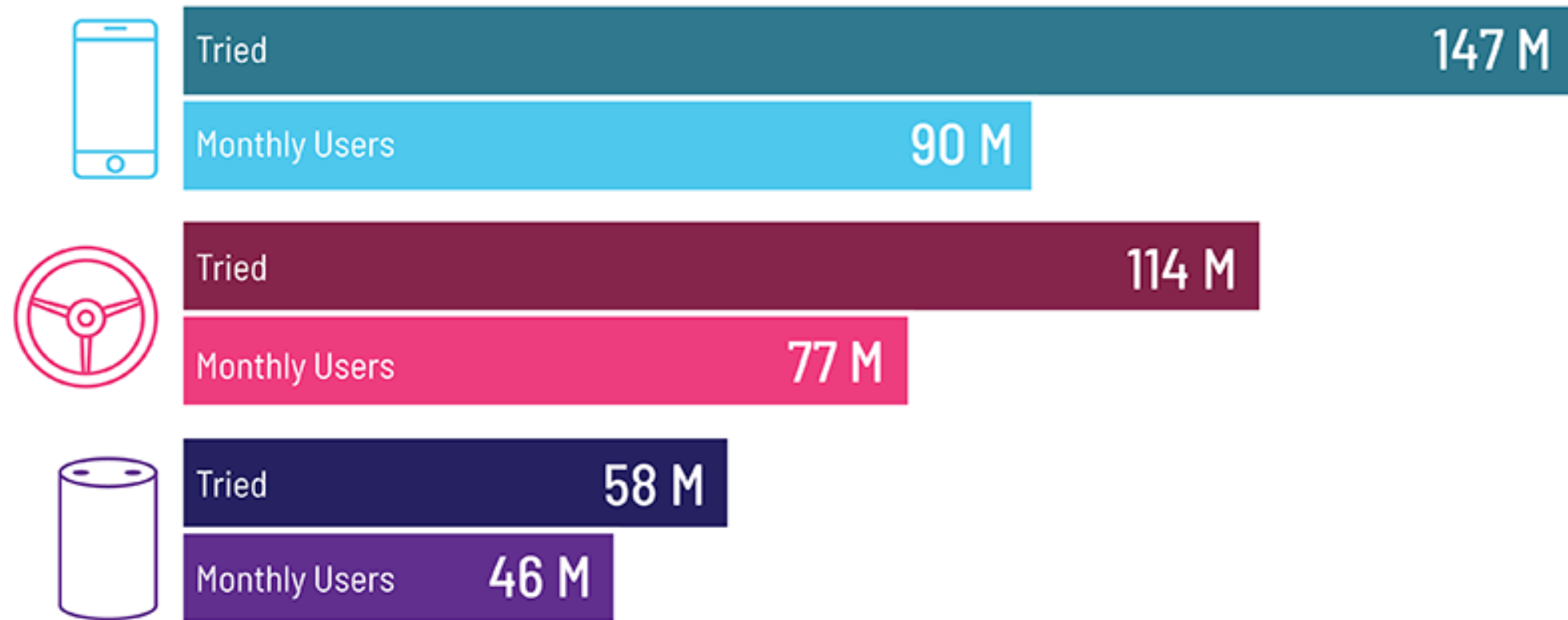
U.S. Adults, September 2018

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Phase 1 is Over

PHASE 1

2011
iPhone 4s + Siri

2014
Amazon Echo

2016
Google Home

2018
One billion devices have access to various voice assistants

PHASE 2

Profileration of devices with integrated voice assistants
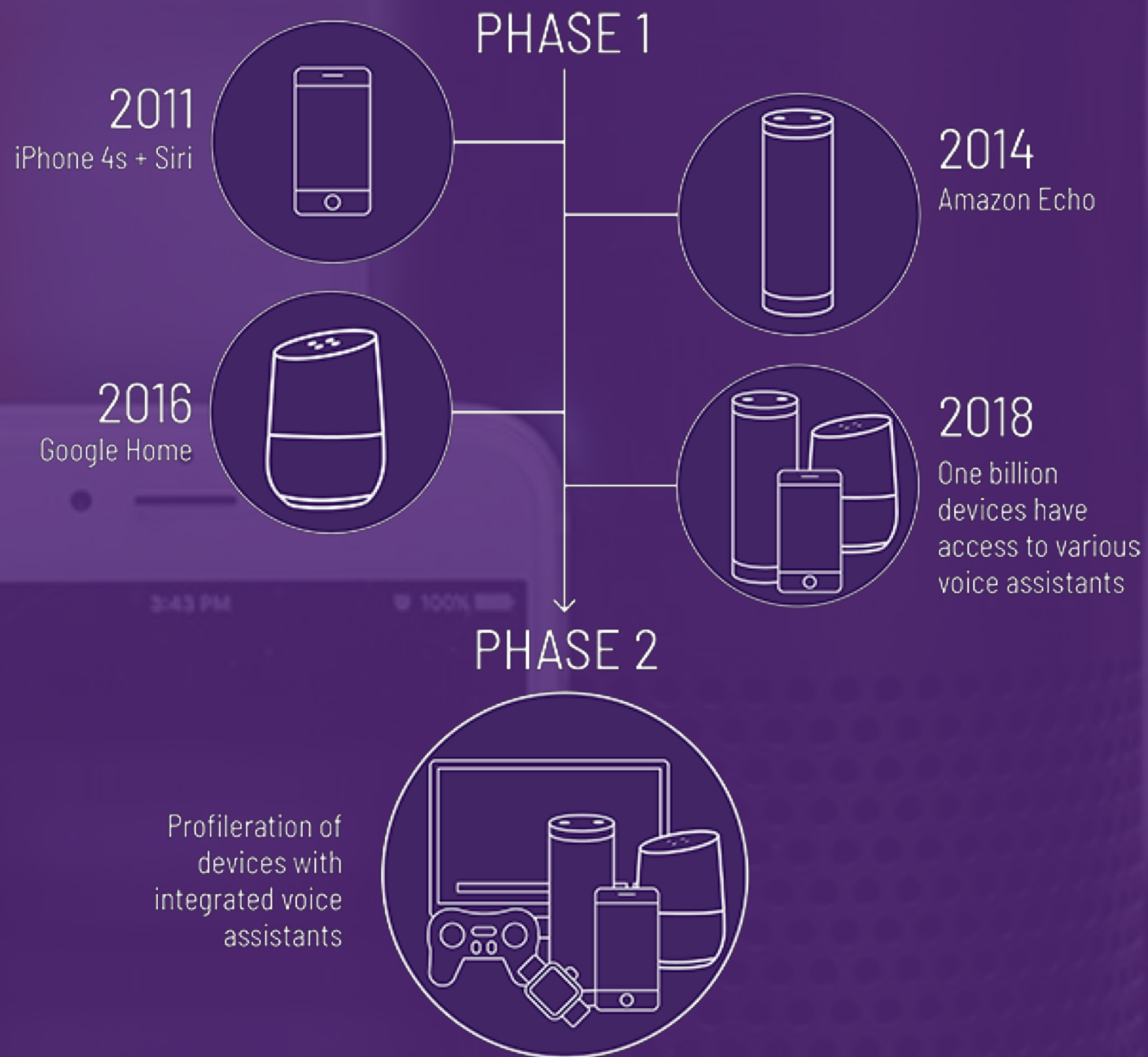
Phase 2 – Voice Assistants Gone Wild

7.3% Smart Watch

4.7% Multimedia Player

6.7% Cable / Satellite TV Provider

11.3% Headphones

11.4% Desktop / Laptop Computer

58.2% Smartphone

7.4% Television

22.9% Smart speaker

5.3% Game Console

0.5% Appliance

1.6% Home Theater System

45.3% In-Car
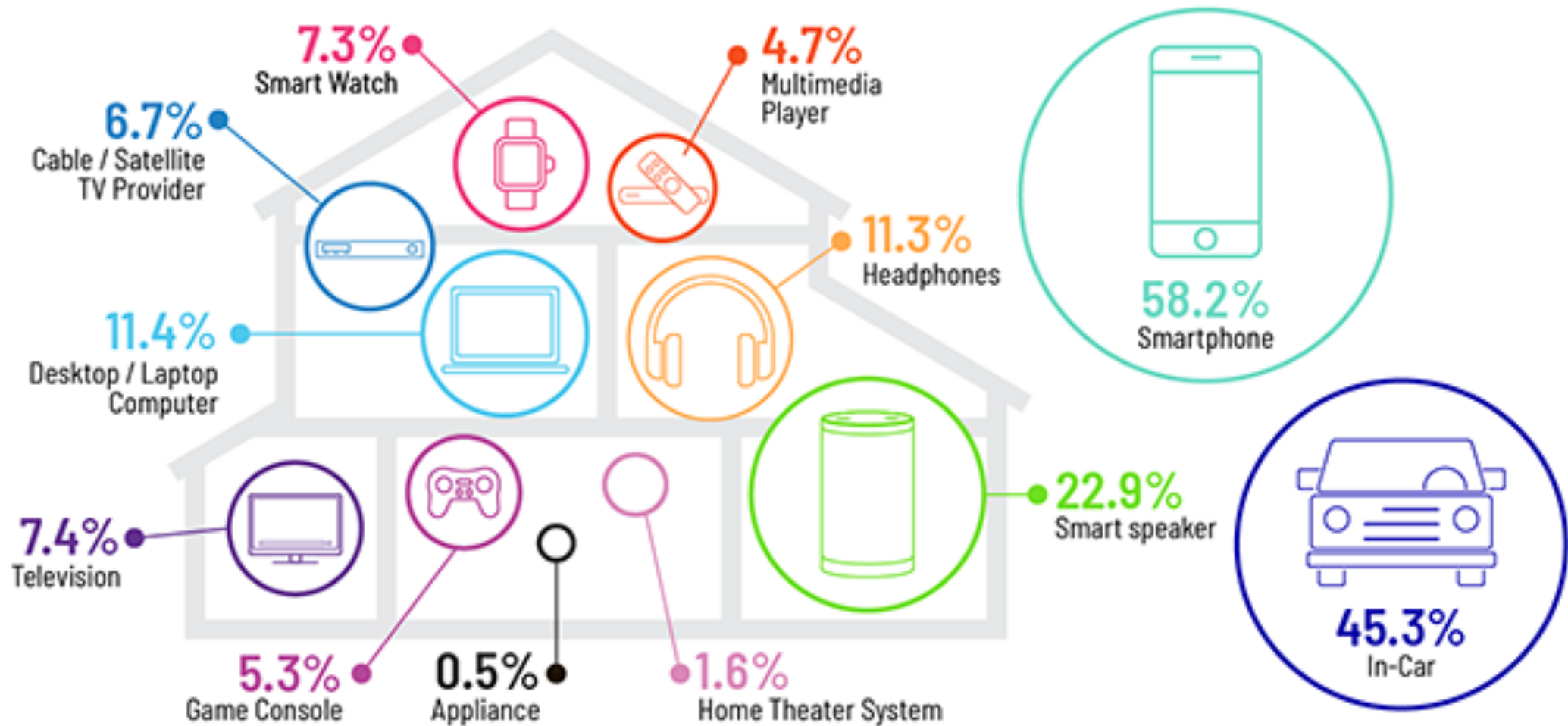
More than Surface Differences

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Surfaces Have Different Use Case Priorities

Top 5 Use Cases by Surface

SMART SPEAKER

Ask a question
91.0%

Listen to streaming music service
89.5%

Check the weather
85.2%

Set a timer
71.4%

Listen to radio
68.8%

SMARTPHONE

Ask a general question
83.6%

Traffic or directions
70.6%

Call someone
66.6%

Send a text or email
57.2%

Find a place to eat
55.5%

CAR

Call someone
73.7%

Ask for directions
50.3%

Sent a text
41.2%

Start playing music
28.7%

Ask about restaurants
17.6%

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

Legend:
- In car
- On smartphone
- On smart speaker

Never
- In car: 3.6%
- On smartphone: 3.5%
- On smart speaker: 6.7%

Rarely, but I've tried it
- In car: 28.9%
- On smartphone: 35.0%
- On smart speaker: 14.2%

At least monthly
- In car: 67.5%
- On smartphone: 61.5%
- On smart speaker: 79.1%

At least daily
- In car: 24.2%
- On smartphone: 24.3%
- On smart speaker: 45.5%
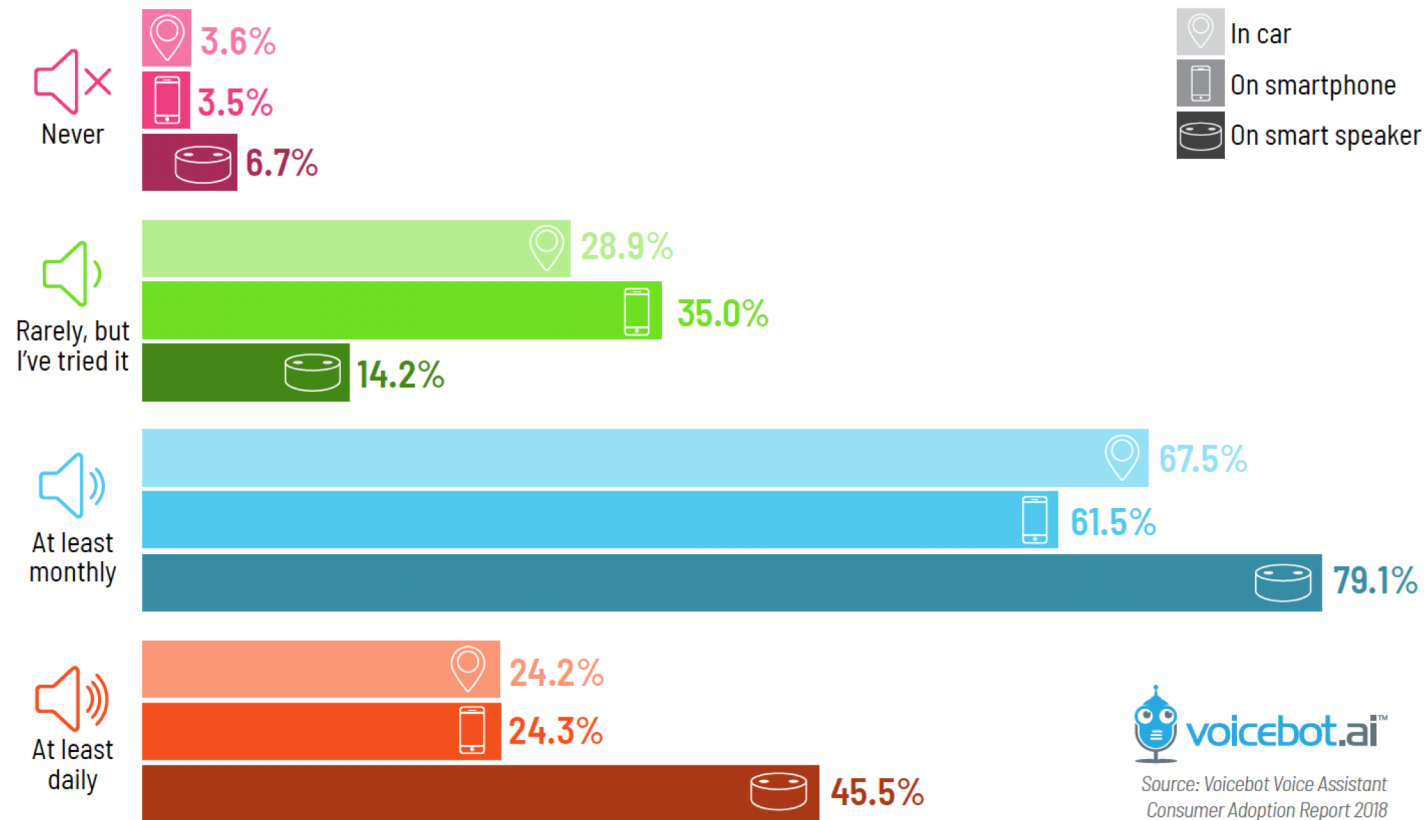
Source: Voicebot Voice Assistant Consumer Adoption Report 2018

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What Consumers Say

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What Users Want

Most Important Qualities of a Voice Assistant

CAPABILITIES

How well it understands me when I speak — **53.1%**

How fast it responds — **36.8%**

I am not interested in using a voice assistant — **36.5%**

How much it can do — **33.4%**

FEATURES

Whether I can use it when driving — **15.8%**

It is available on multiple devices — **12.1%**

Its personality — **6.2%**

Whether it has my favorite media entertainment — **3.4%**

Whether it has good games — **2.6%**

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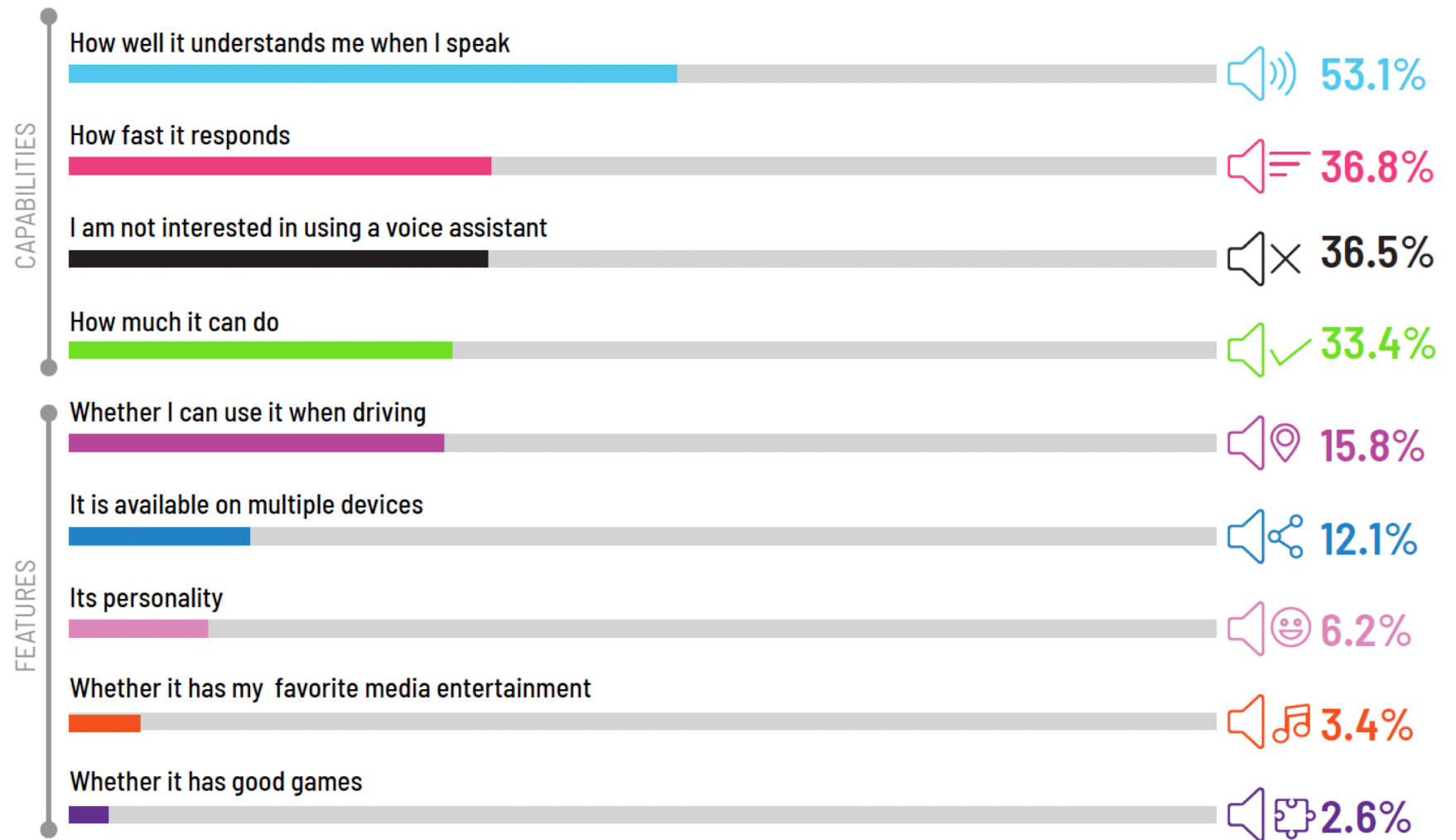
Voice Assistants are Getting Better

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

22.6% Don't Know

0.3% Degraded considerably

1.3% Degraded slightly

25.8% Improved a lot

30.1% Improved Slightly

19.8% Stayed about the same

Phase 1 vs. Phase 2

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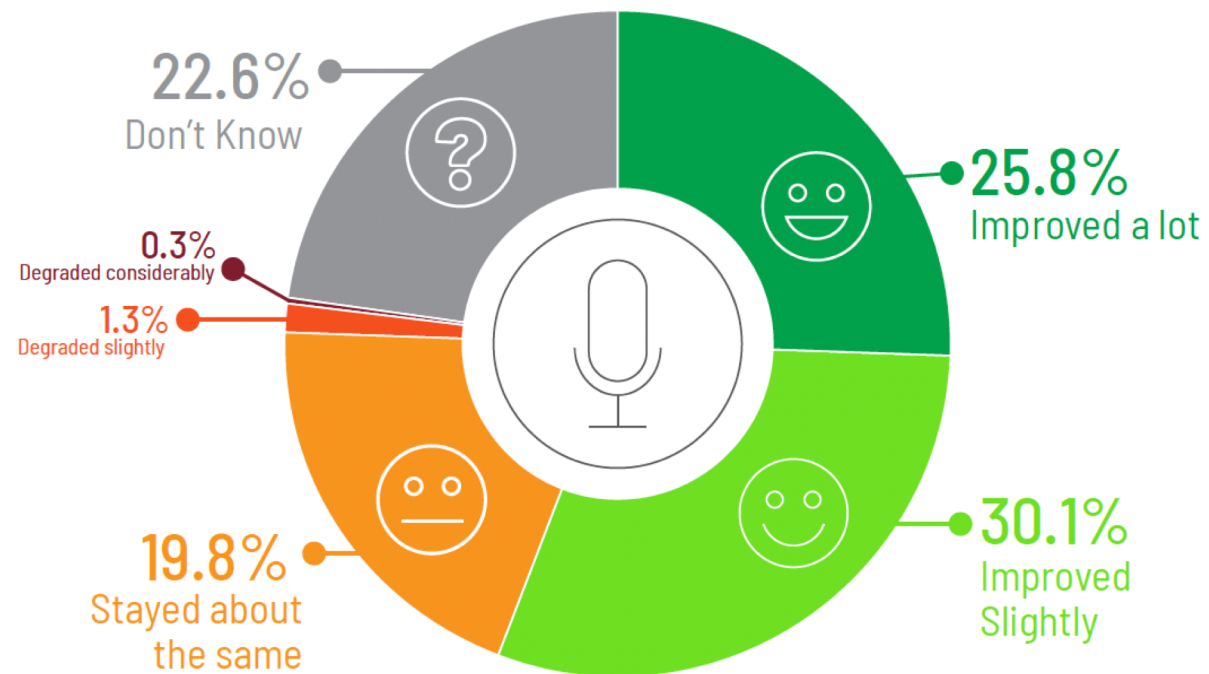
Phase 1 – Introduction & Reach

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

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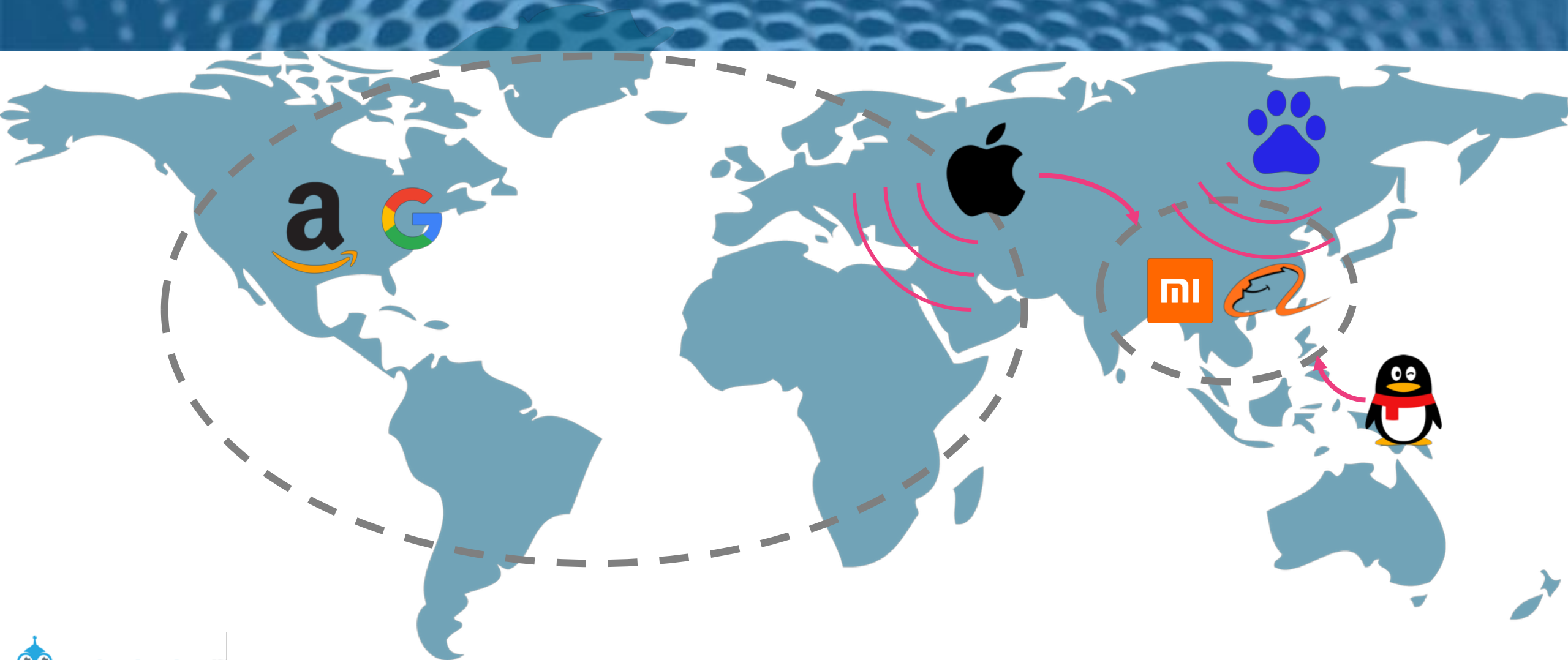
Where we are Headed

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

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