

THE smart
audio REPORT

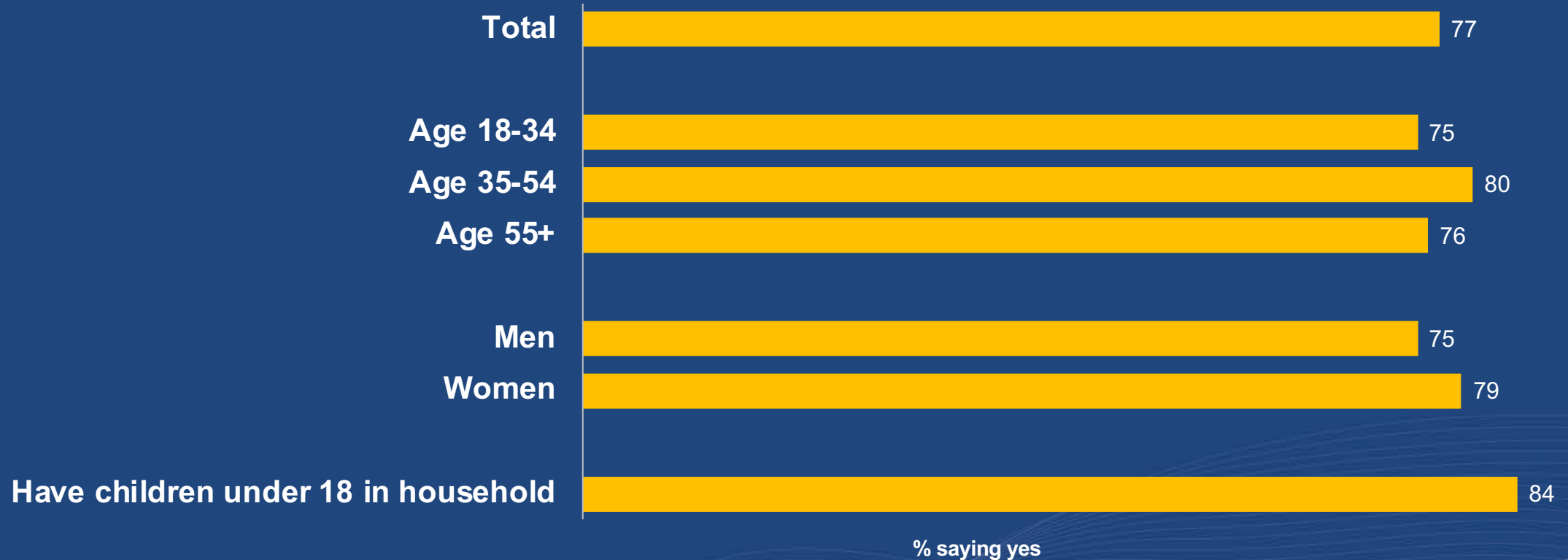
#SmartAudioReport
npr.org/smartaudio

Methodology

- National telephone survey of 1015 adults age 18 and older
 - Conducted 12/31/2019 – 1/5/2020
 - Tracking from previous telephone study in December 2018
- National online survey of adults age 18 and older
 - Conducted 3/31/2010 – 4/1/2020, starting 20 days after COVID-19 was declared a pandemic by the WHO on 3/11/2020
 - 815 smart speaker owners
 - 428 do not own smart speaker; use voice-operated assistants on at least one other device (Voice-users/no smart speaker)
 - 417 do not use voice-operated assistants at all (Non-voice users)
 - Tracking from previous online studies from Spring 2017 and Spring 2018
- Ethnographic interviews in Denver, Kansas City, Orlando
 - Conducted in Feb 2020

Total U.S. online population 18+

Has your typical routine changed due to the outbreak of COVID-19?

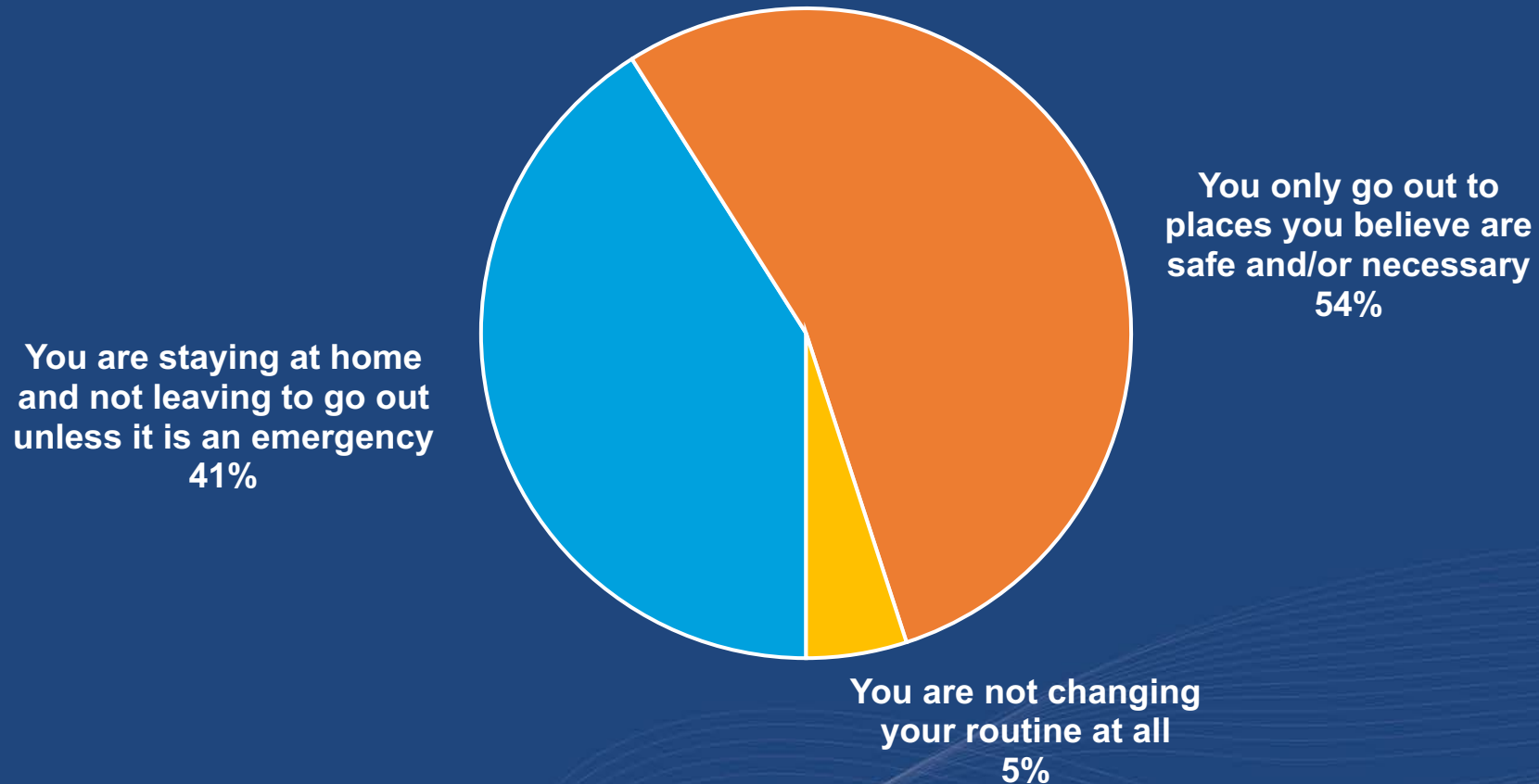


Spring 2020

Base: Total U.S. Online population 18+

Total U.S. online population 18+

Since the outbreak of COVID-19, which best describes your daily routine?

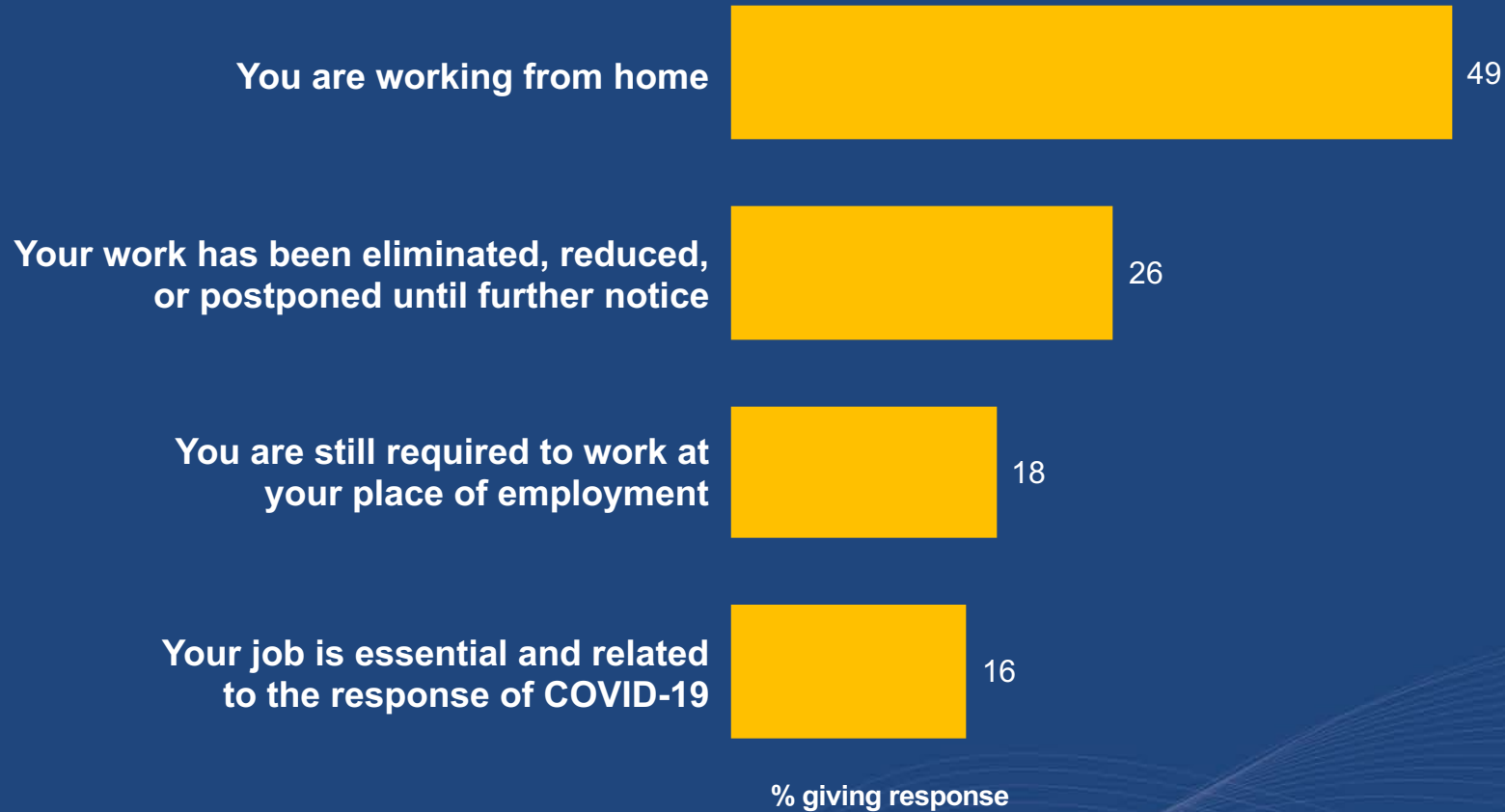


Spring 2020

Base: Total U.S. Online population 18+

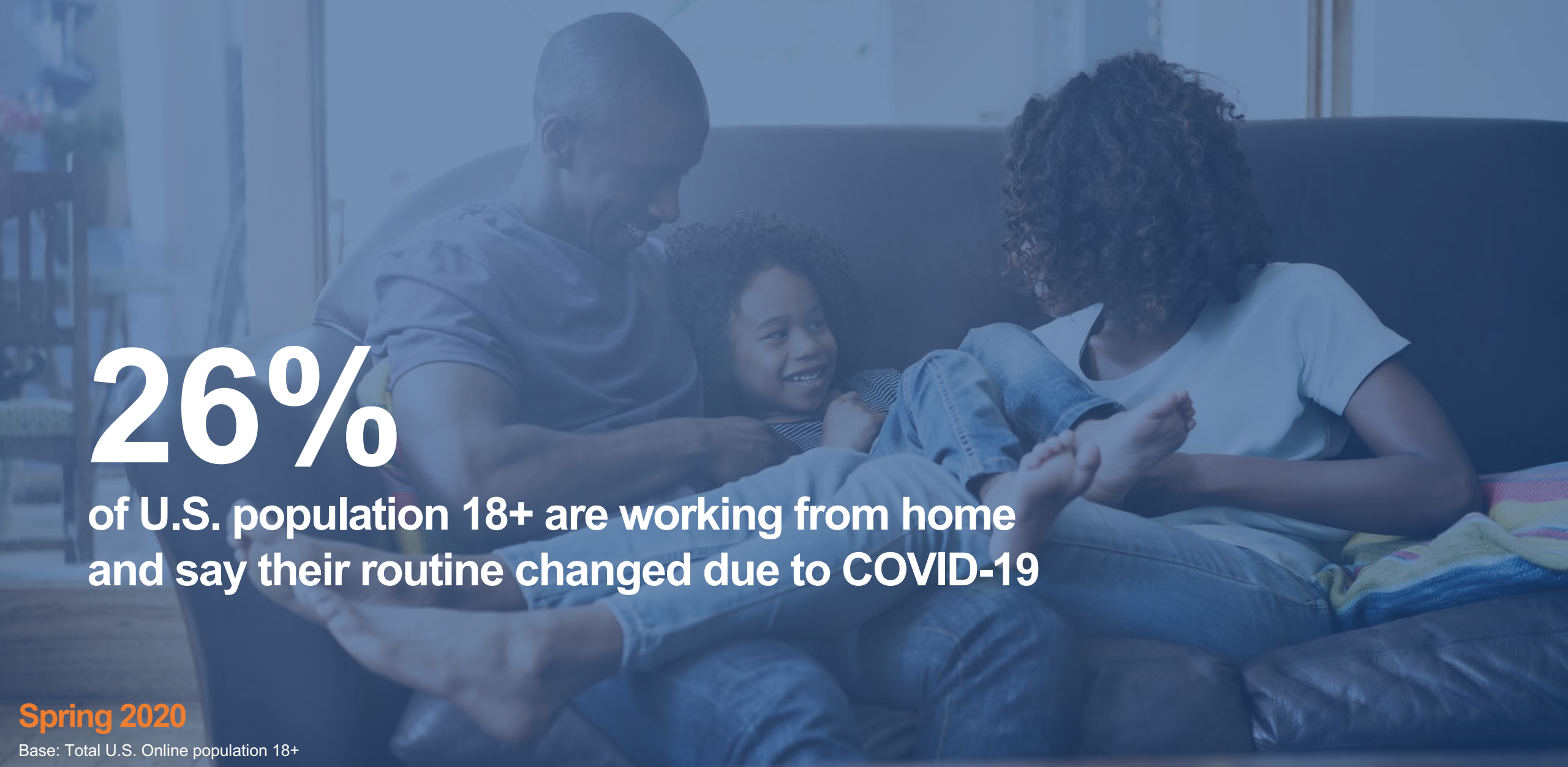
Employed/Temporarily Unemployed

Since the outbreak of COVID-19, which best describes your work routine?



Spring 2020

Base: Age 18+, Full-time employed, part-time employed, or temporarily unemployed (61%)

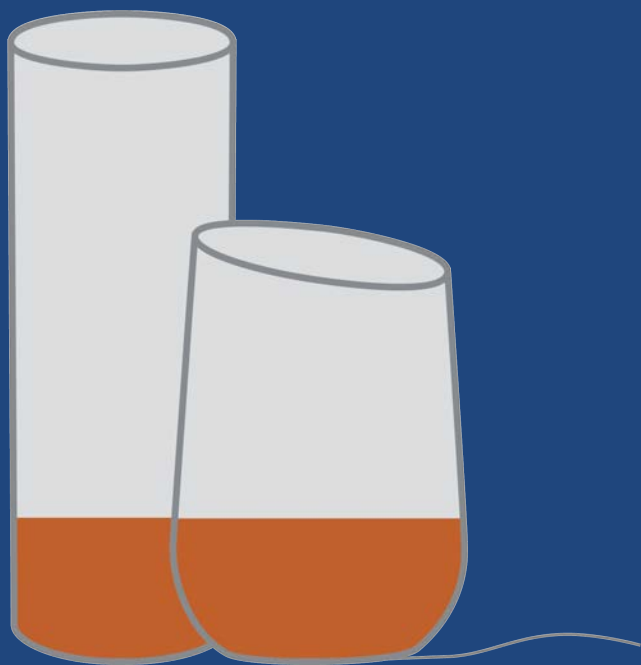


26%

of U.S. population 18+ are working from home
and say their routine changed due to COVID-19

Spring 2020

Base: Total U.S. Online population 18+



24% of Americans
18+ own a Smart Speaker,
or around 60 million people

In 2019, 21% of U.S. adults 18+ owned a
smart speaker, or around 53 million people

Google Home Google Home is a trademark of Google Inc.

Smart speaker owners % owning type of smart speaker

Any Amazon speaker

78

Any Google speaker

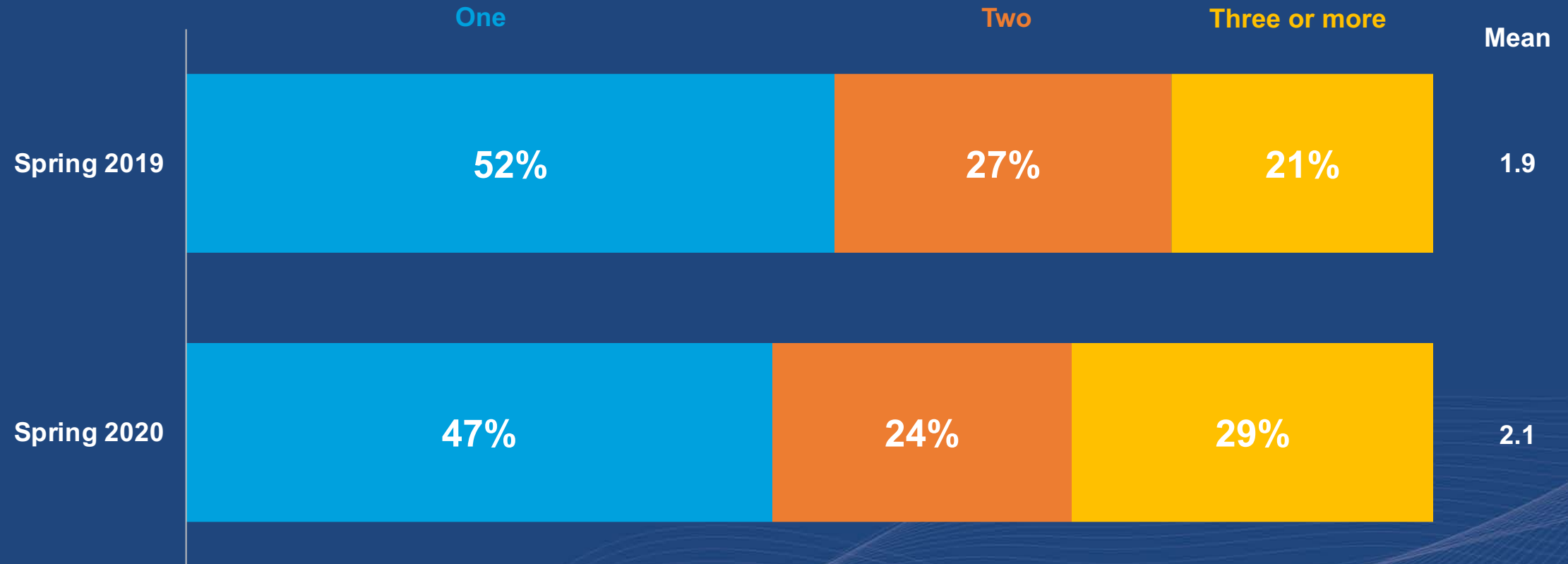
41

Spring 2020

Base: Own a smart speaker

Smart speaker owners

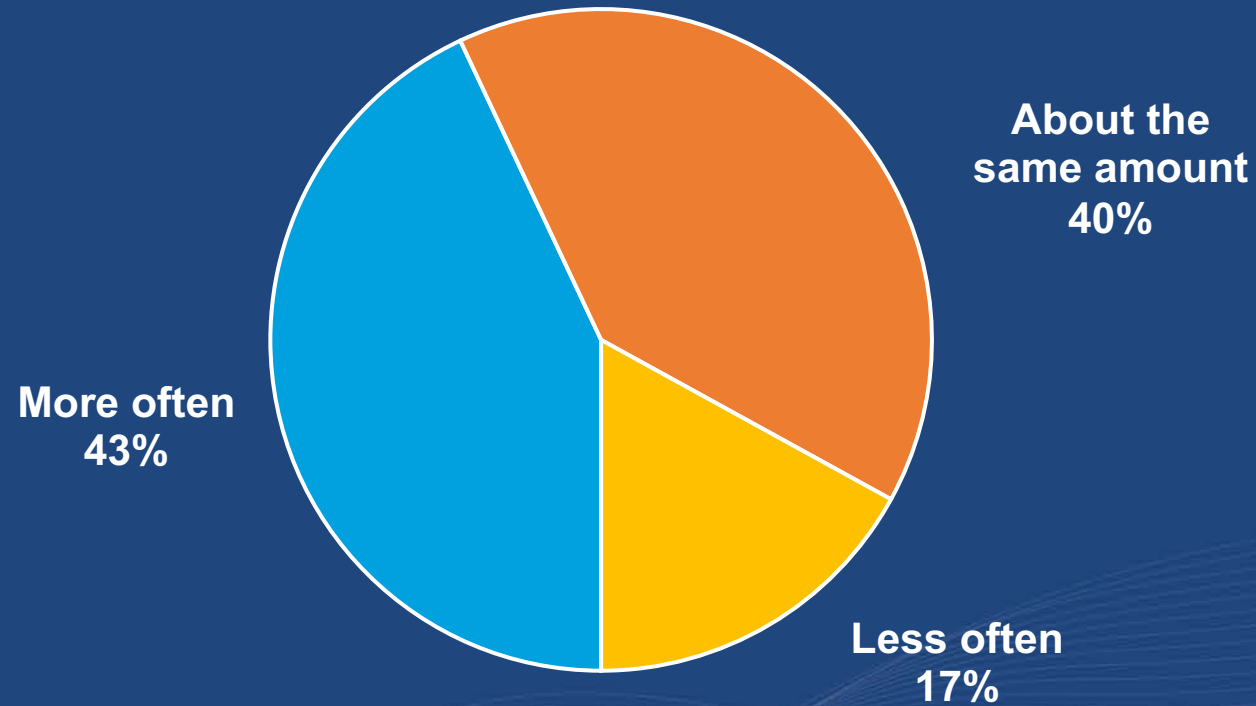
How many smart speakers do you have in your home?



Base: Own a smart speaker

Smart speaker owners

Compared to the first month you owned your smart speaker,
are you using your smart speaker...?

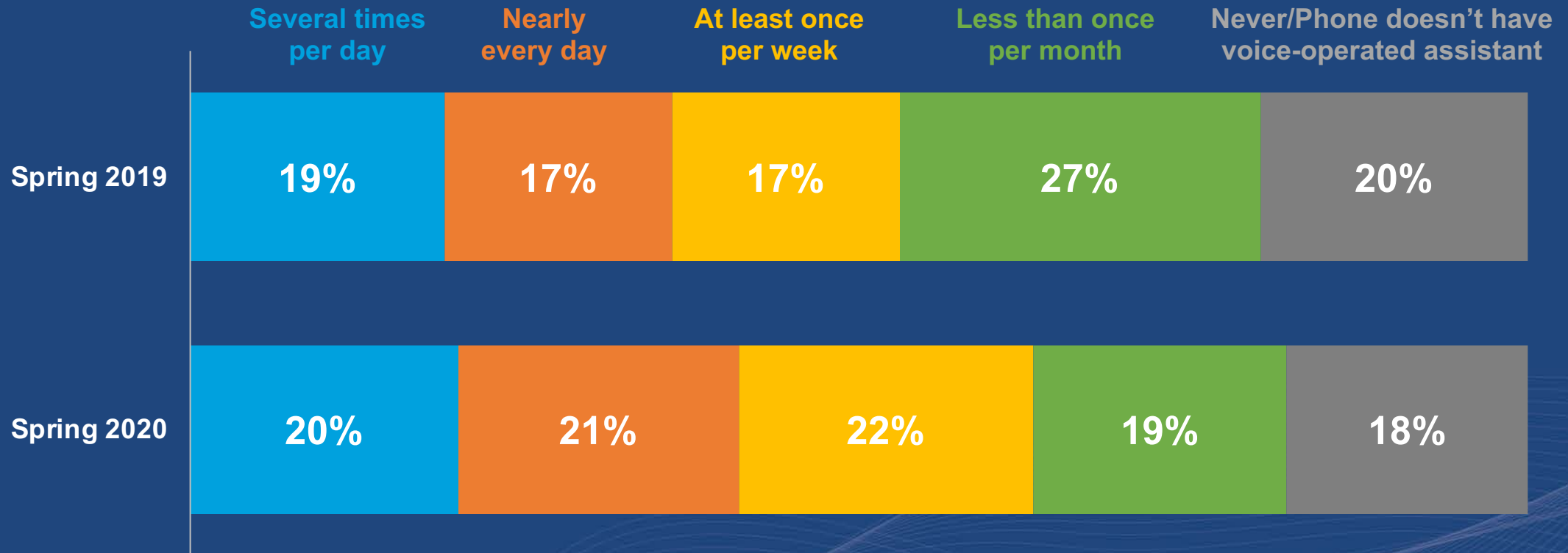


Spring 2020

Base: Own a smart speaker

Smart speaker owners and smartphone voice users

How often do you use the voice-operated personal assistant on your smartphone?

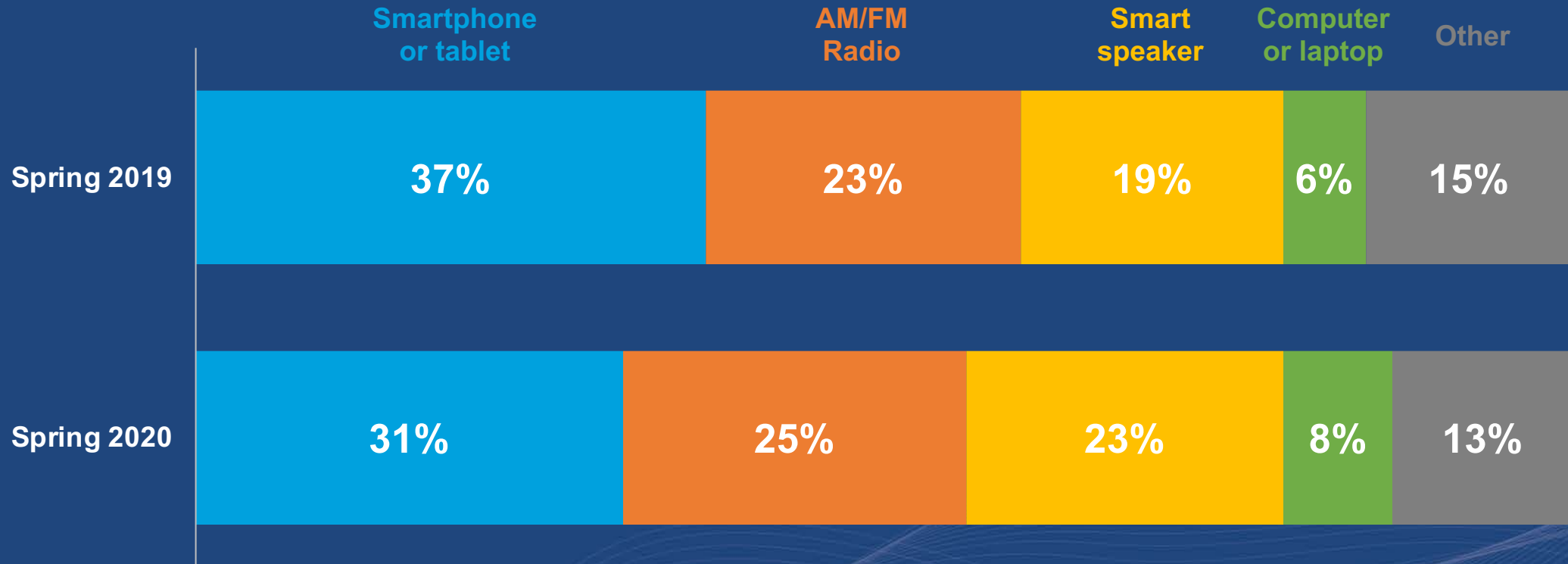


Spring 2020

Base: Own a smart speaker and own a smartphone

Smart speaker owners

How do you listen to audio most often?



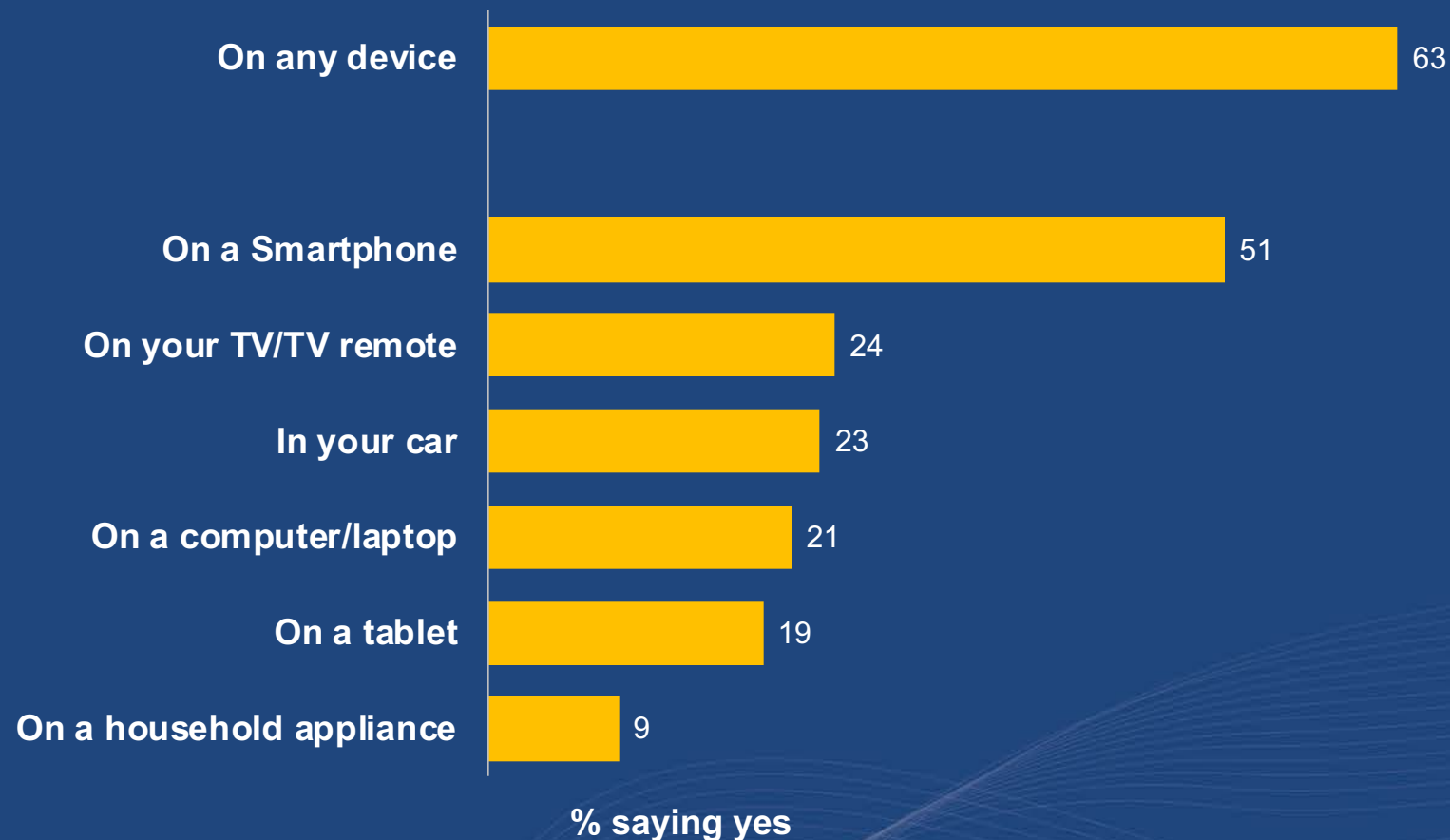
Spring 2020

Base: Own a smart speaker

Voice Assistants

Total U.S. Online population 18+

Do you currently ever use a voice-operated personal assistant...



Spring 2020

Base: Total U.S. Online population 18+



56%

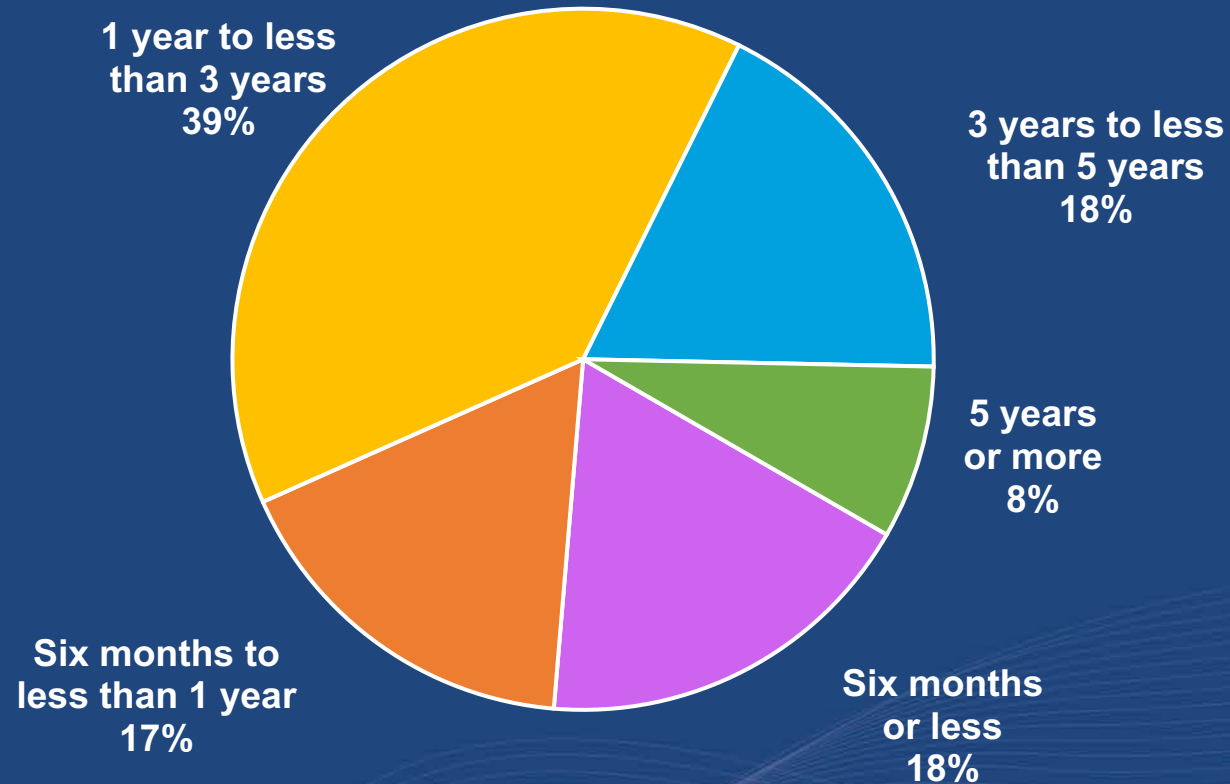
of those who **use a voice assistant on a smartphone**
say they keep the voice-operated personal assistant
on their smartphone turned on all the time

Spring 2020

Base: Use the voice assistant on smartphone

Voice-operated assistant users

How long have you been using voice-operated assistants of any kind?

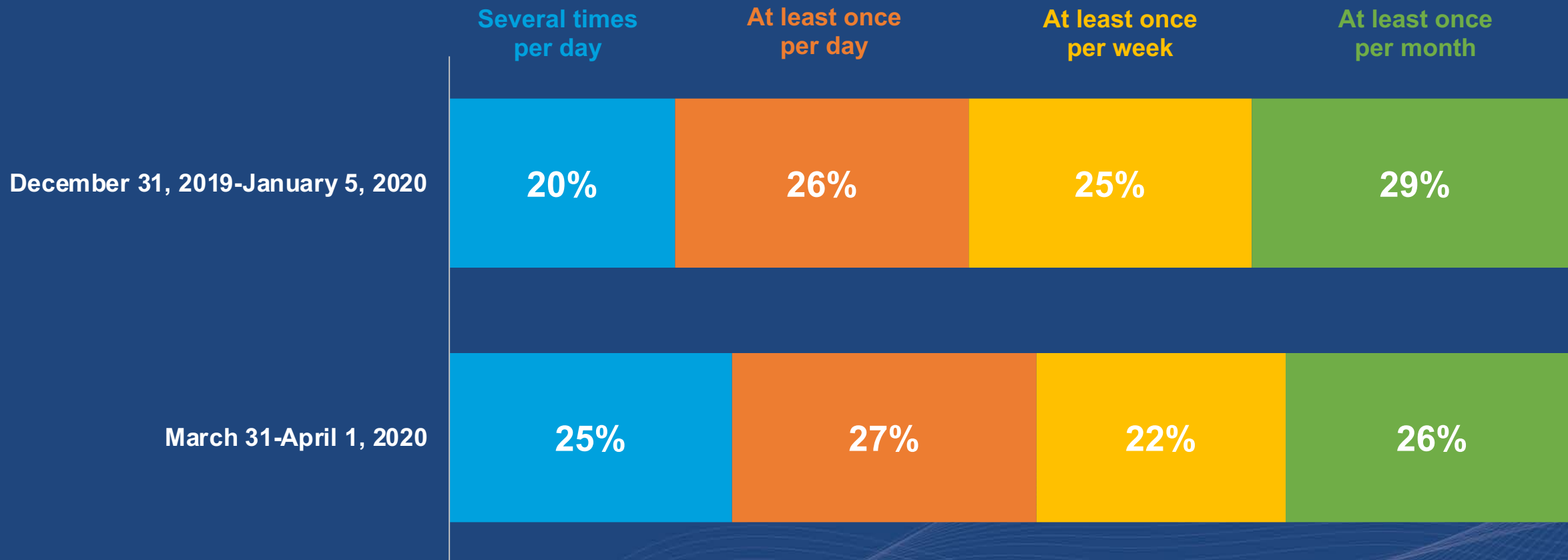


Spring 2020

Base: Ever use voice-operated personal assistants

Voice-operated assistant users

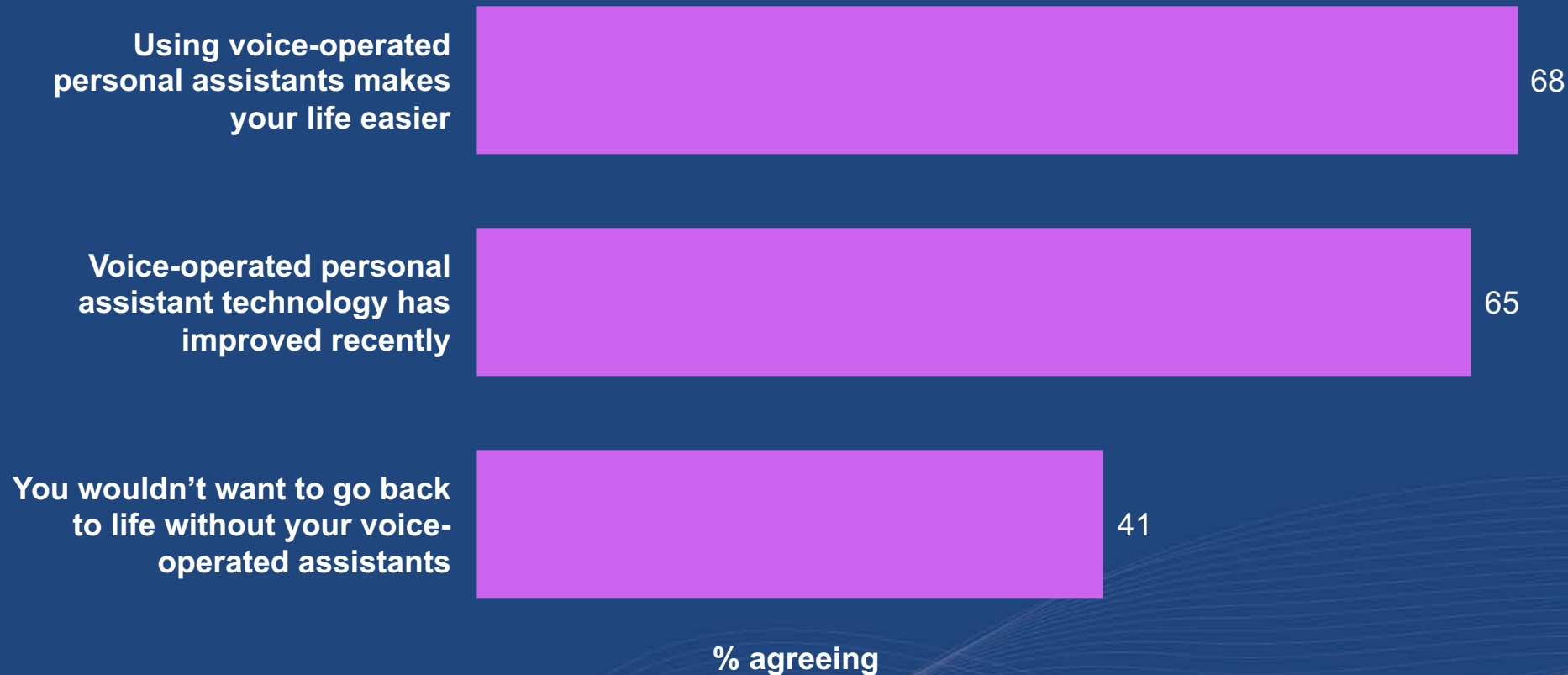
How often do you use voice commands?



Spring 2020

Base: Ever use voice-operated personal assistants

Voice-operated assistant users agree:



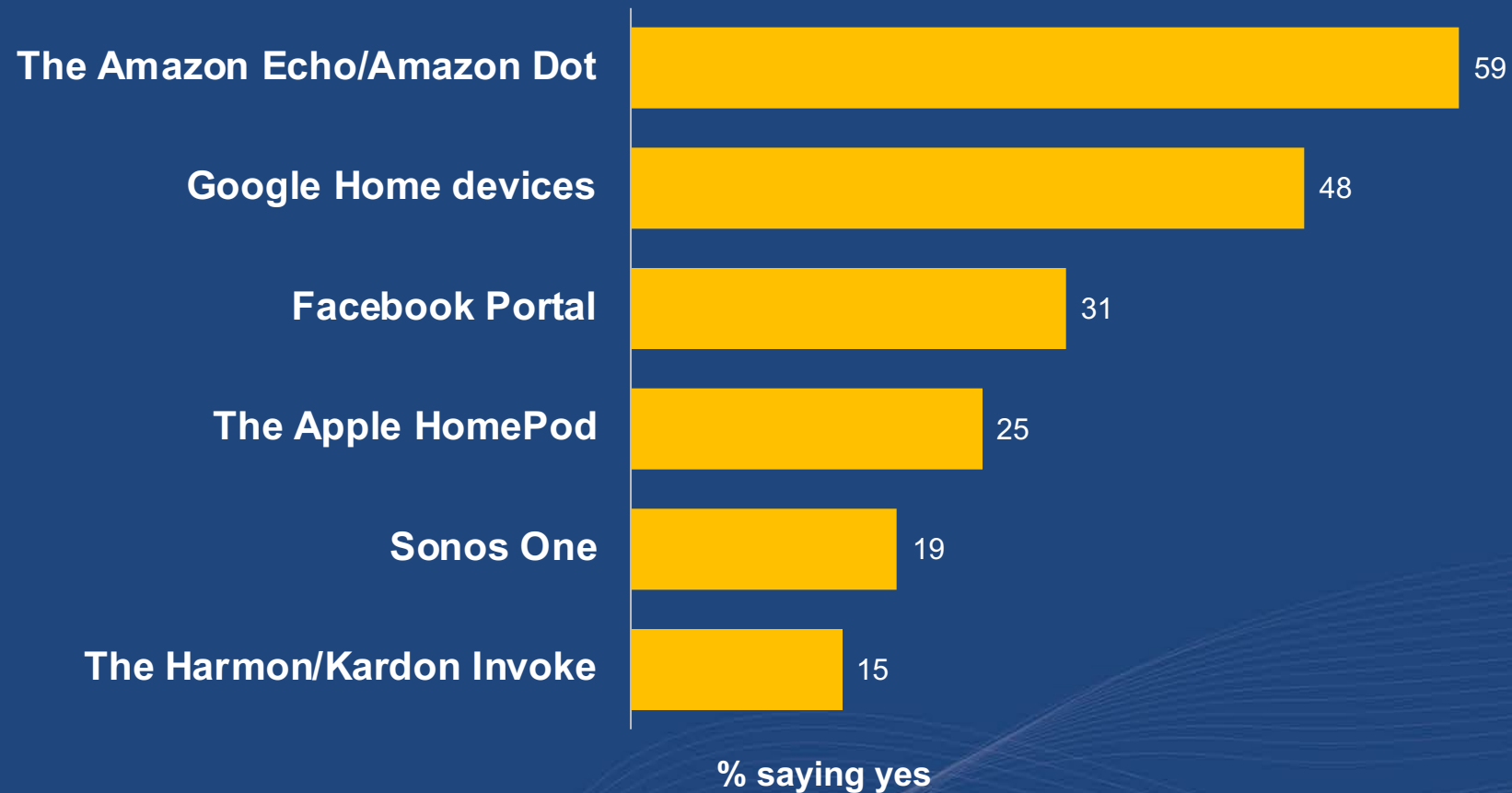
Spring 2020

Base: Smart speaker non-owners

Smart Speaker Non-Owners

Smart speaker non-owners

Have you ever heard of...?



Spring 2020

Base: Smart speaker non-owners

Smart speaker non-owners

% saying this is a reason they do not own a smart speaker

It bothers you that voice-enabled smart speakers are always listening

66

You worry that hackers could use voice-enabled smart speakers to get access to your home or personal information

65

You do not trust the companies that make the smart speakers to keep your information secure

58

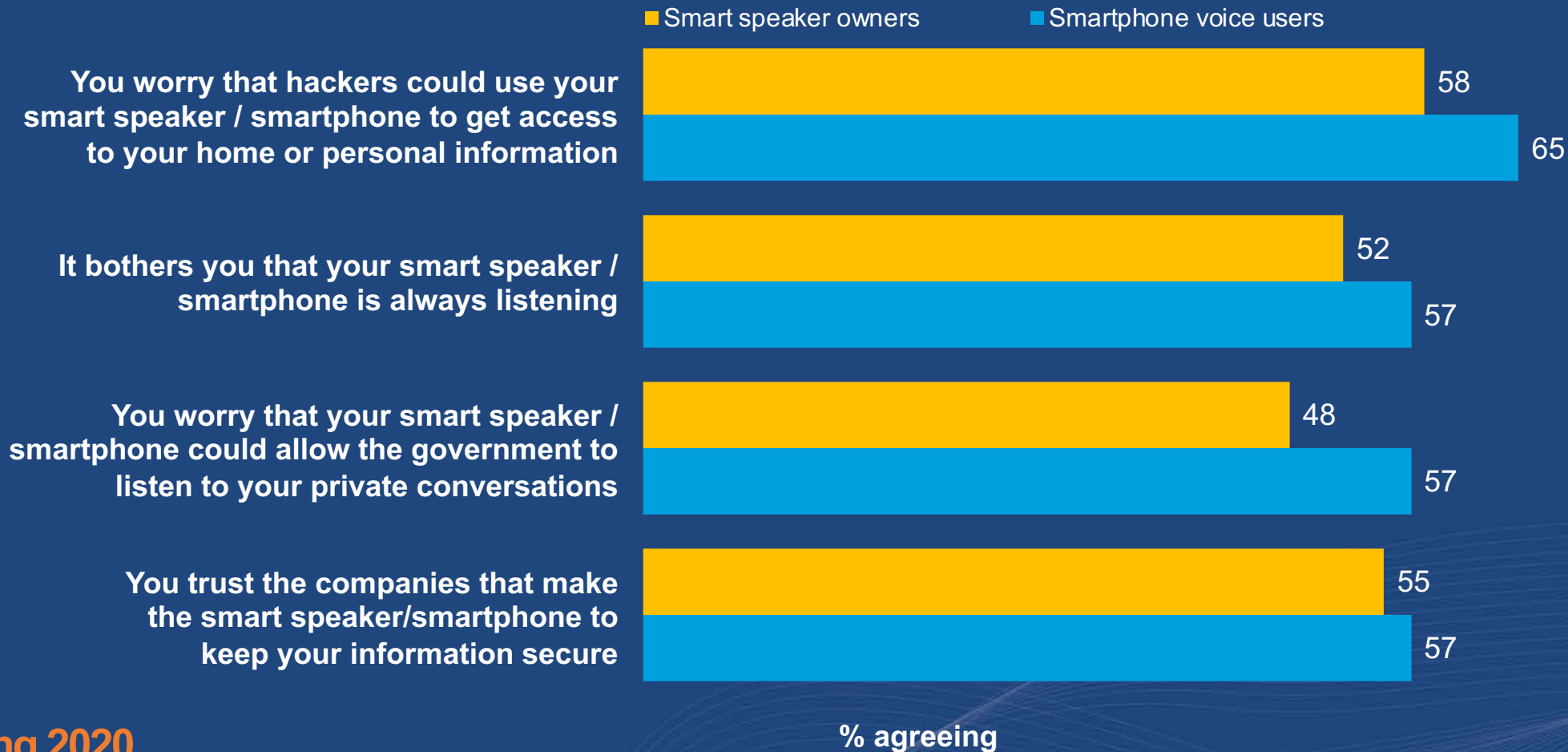
You worry that voice-enabled speakers could allow the government to listen to your private conversations

46

Spring 2020

Base: Smart speaker non-owners

Agree/Disagree: **Smart speaker owners** vs. **Smartphone voice users**



Spring 2020

Base: Own a smart speaker/Smartphone voice users

Smart speaker non-owners

How likely are you to purchase a voice-enabled speaker in the next six months?

Very likely

Somewhat likely

Not at all likely

All smart speaker non-owners

7%

27%

66%

Smart speaker non-owners who use voice commands

14%

38%

48%

Base: Own a smart speaker



46%

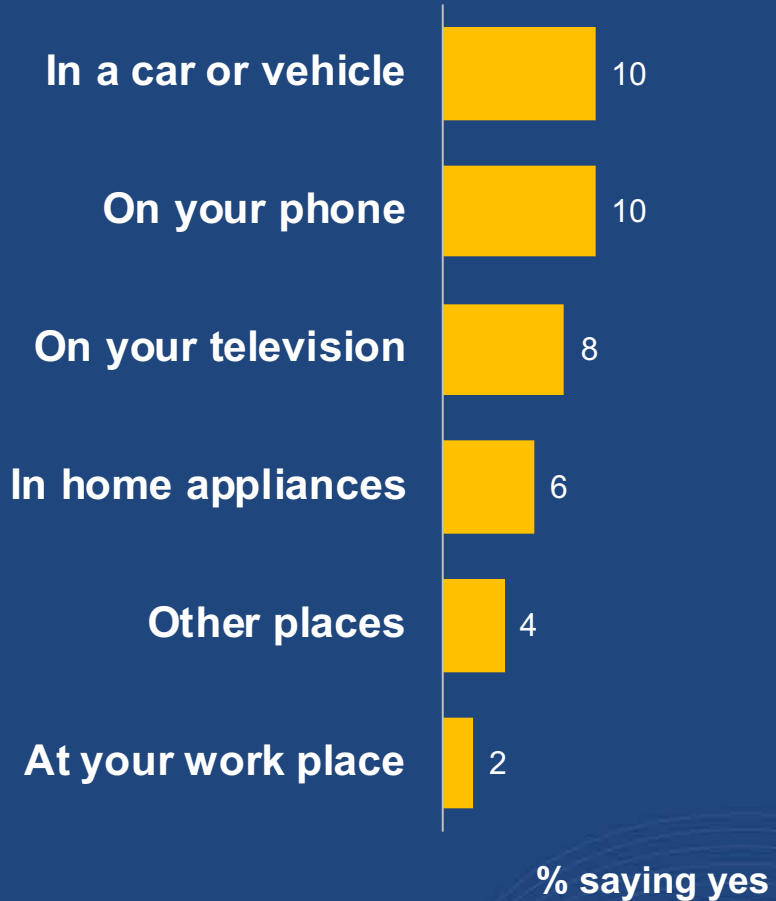
of **smart speaker owners who own a smartphone**
say they are using the voice-operated personal assistant
on their smartphone more since getting a smart speaker

Spring 2020

Base: Smart speaker owners who own a smartphone

Non voice-users

% interested in having voice assistant technology



Spring 2020

Base: Non-voice users

How are people using voice commands?

Smart speaker owners

How do you discover new skills or actions for your smart speakers?



Spring 2020

Base: Own a smart speaker

A smart speaker sits on a round wooden table. Next to it is a book and a vase with dried flowers. The background is a blue patterned fabric.

Own a smart speaker and use
voice assistant on smartphone:

59% say the
tasks completed using a **smartphone
voice-operated assistant** are mostly
different from the tasks completed
using a **smart speaker**

Spring 2020

Base: Smart Speaker owners who use voice assistant on smartphone

Smart speaker owners vs. Smartphone voice users: In a typical week do you request your [device] to...

Task	Smart speaker owners	Smartphone voice users	Difference
Play music	85%	51%	+34
Check the time	62%	40%	+22
Receive reminders	42%	21%	+21
Tell a joke or do something else funny	44%	25%	+19
Set a timer/alarm	65%	47%	+18
Get the weather	74%	58%	+16
Listen to an AM/FM radio station	45%	30%	+15
Play a game	24%	27%	-3
Read short stories	17%	20%	-3
Order food	18%	24%	-6
Find restaurants or businesses in your area	31%	38%	-7
Get the traffic	28%	36%	-8
Make a phone call	32%	46%	-14
Read or respond to a text message	Not asked	39%	--

Spring 2020

Smartphone voice assistant users request

8.8

different types of tasks on
their smartphone in a
typical week

Base: Smartphone voice users

Smart speaker owners request

10.8

different types of tasks on
their smart speaker in a
typical week

Base: Smart speaker owners

Spring 2020

2019:

Smart speaker owners request

9.4

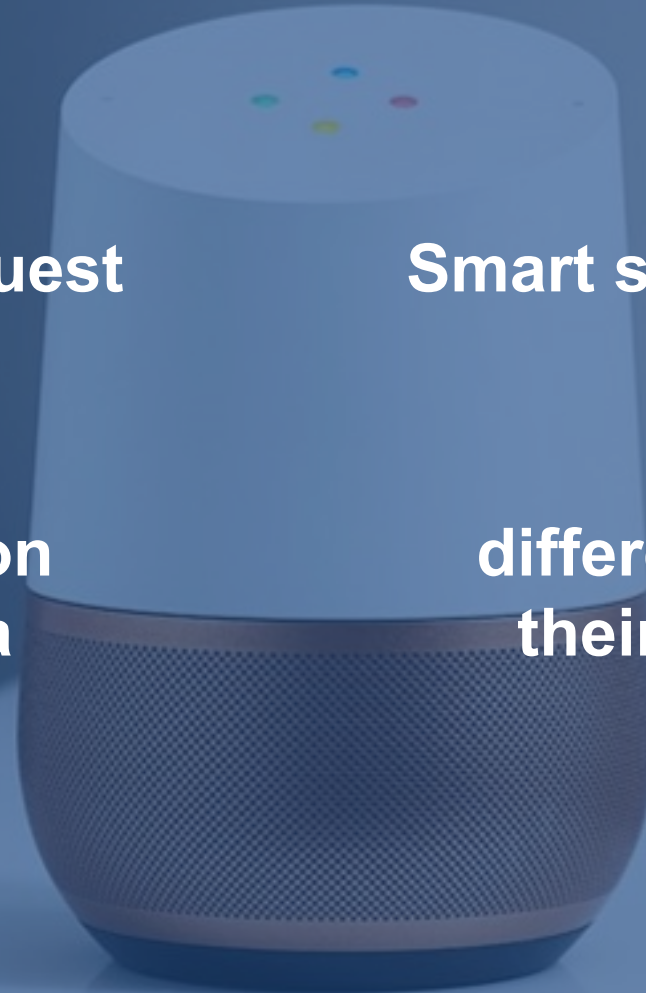
different types of tasks on
their smart speaker in a
typical week

2020:

Smart speaker owners request

10.8

different types of tasks on
their smart speaker in a
typical week



Spring 2020

Base: Own a smart speaker

Smart speaker owners and smartphone voice users agree:

The voice assistant on your smart speaker is better than the voice assistant on your smartphone

55

The voice assistant on your smartphone is better than the voice assistant on your smart speaker

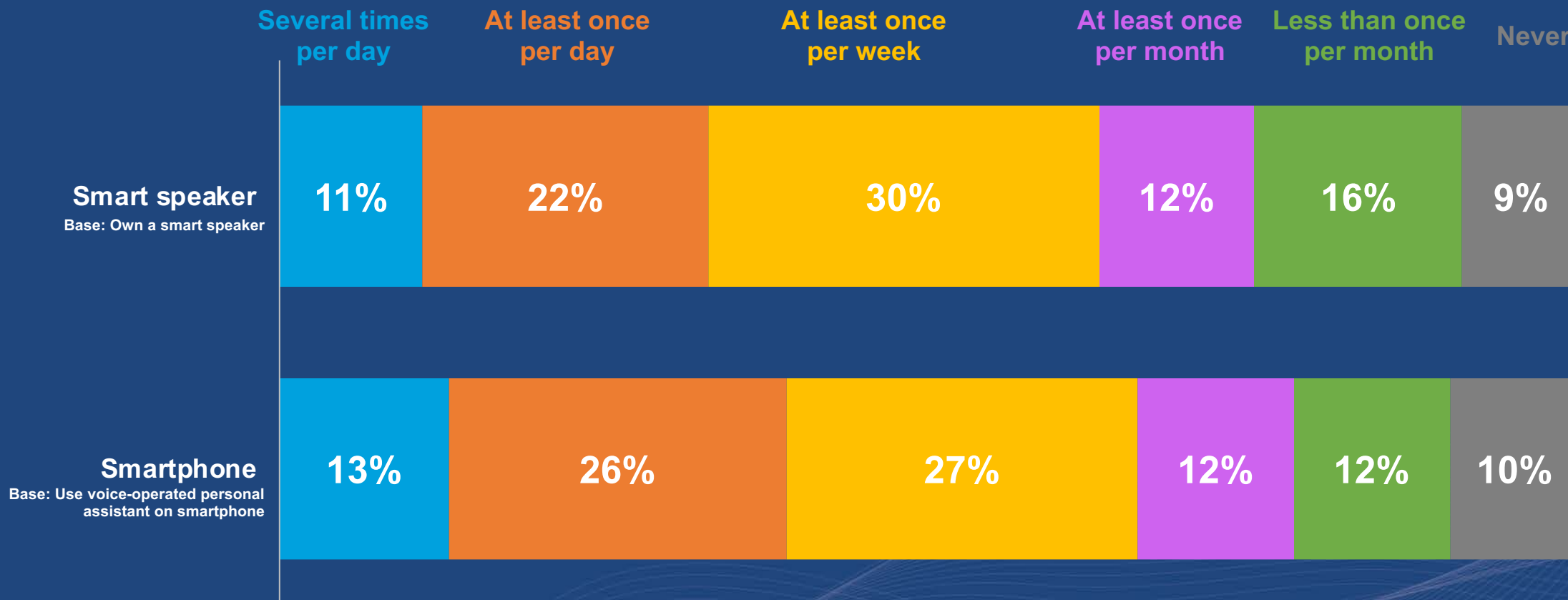
45

% agreeing

Spring 2020

Base: Use voice-operated assistant technology on smartphone and on a smart speaker (82%)

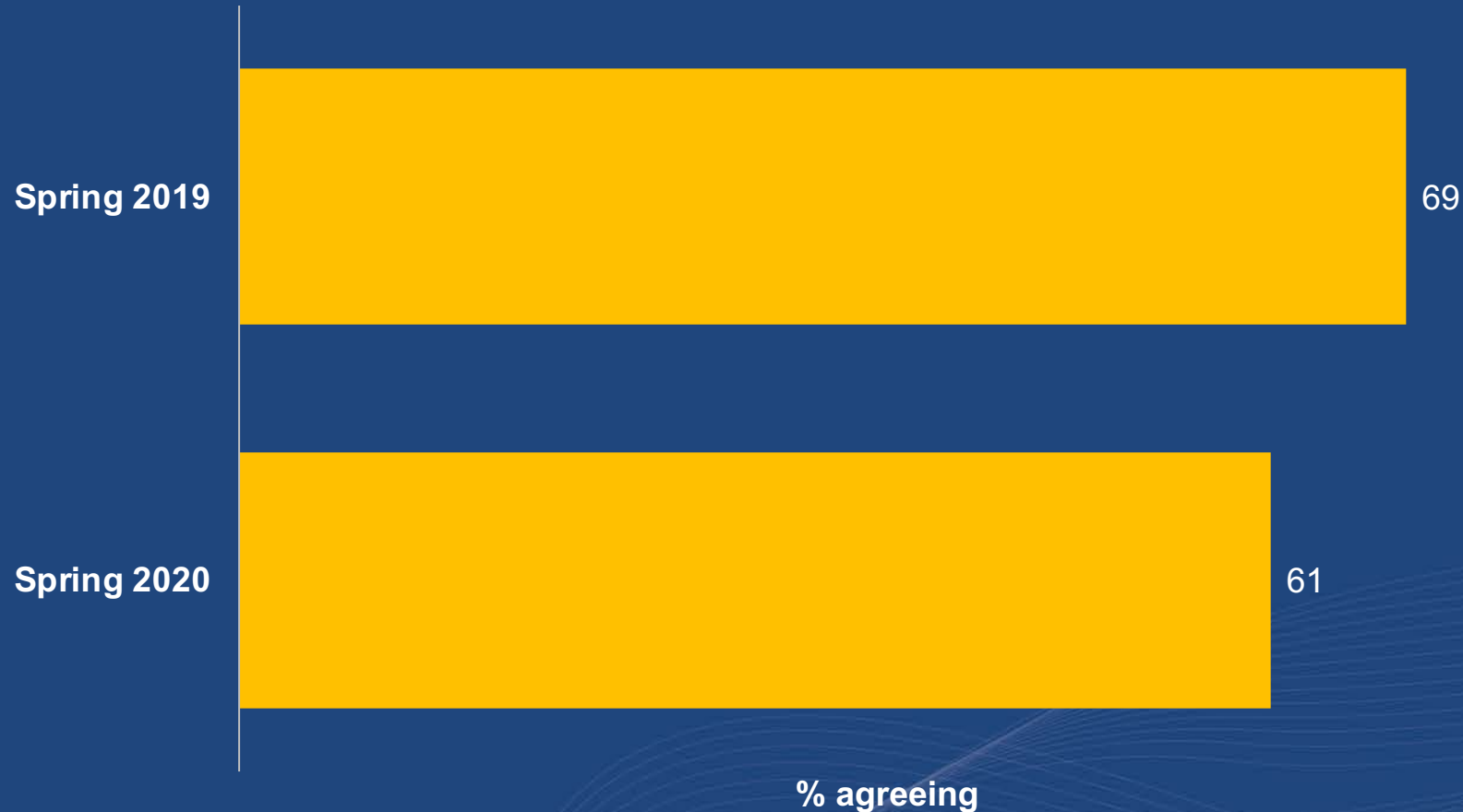
How often does [device] misunderstand or mishear a request?



Spring 2020

Smart speaker owners

“You don't know enough about your smart speaker to use all its features”

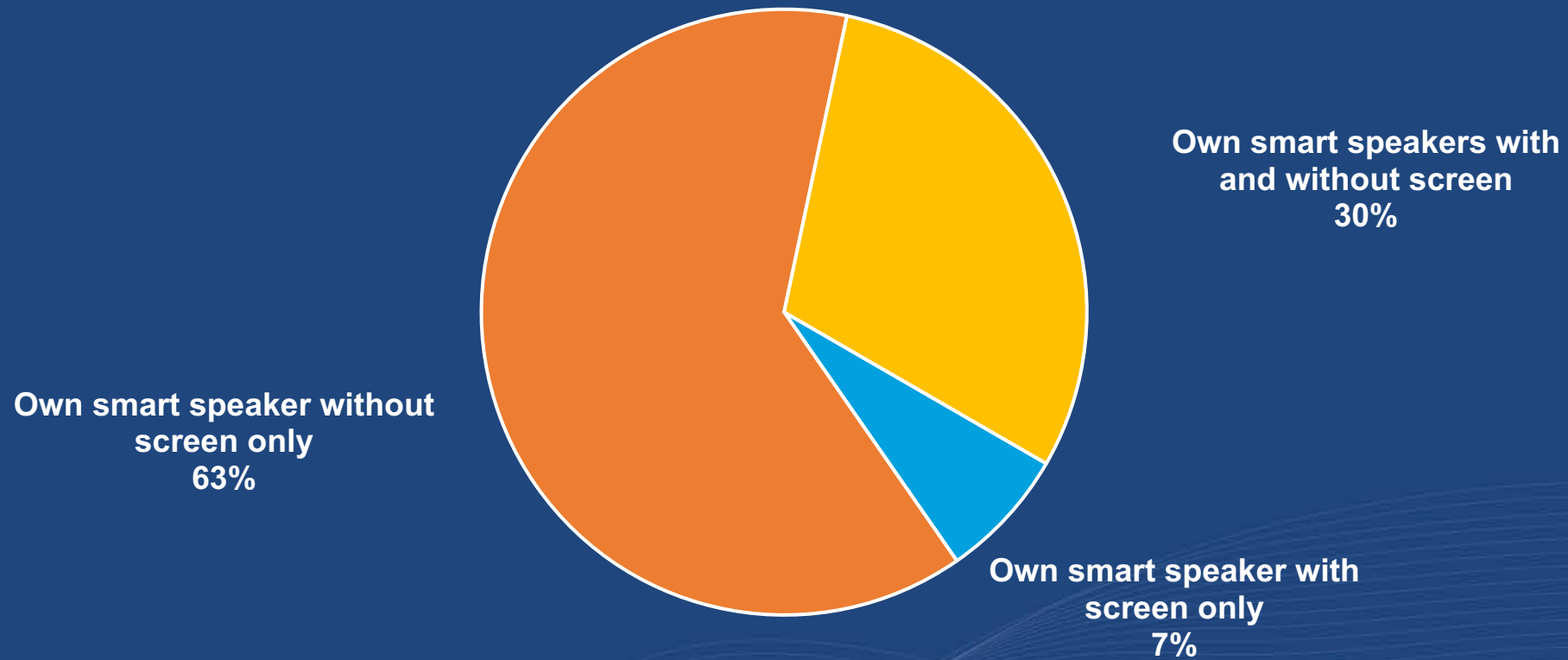


Base: Own a smart speaker

Smart Speakers with Screens

Smart speaker owners

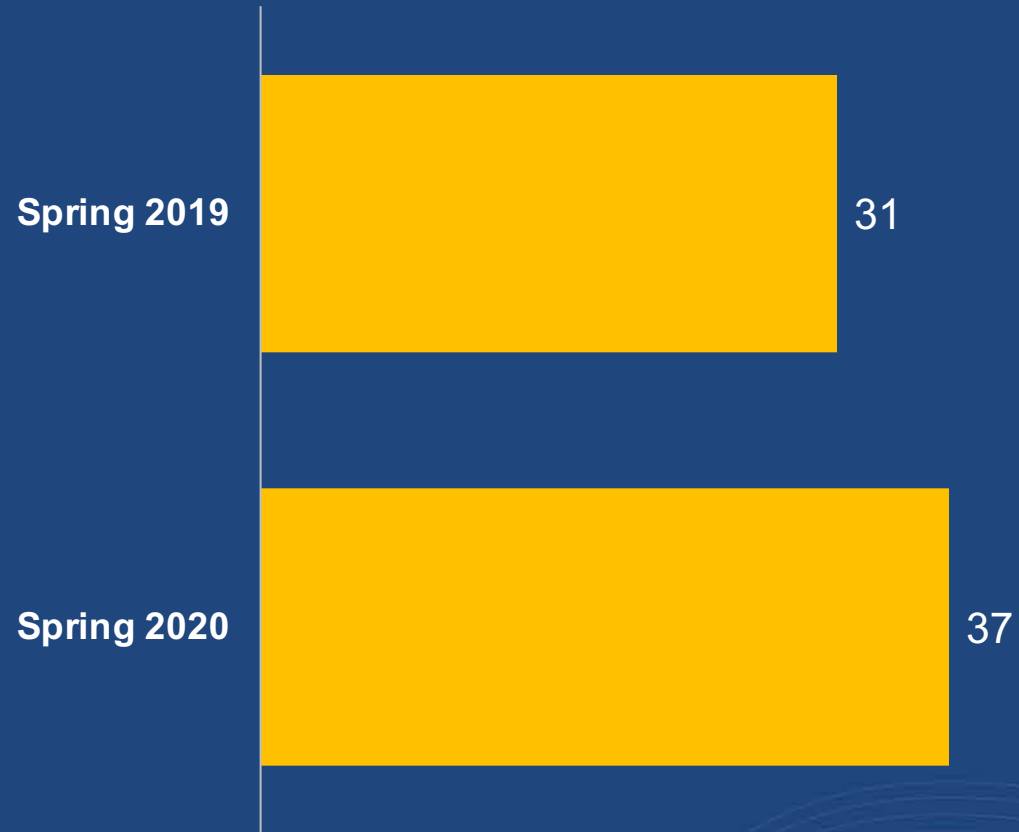
Type of smart speaker owned



Spring 2020

Base: Smart speaker owners

Smart speaker owners % owning a smart speaker with a screen:

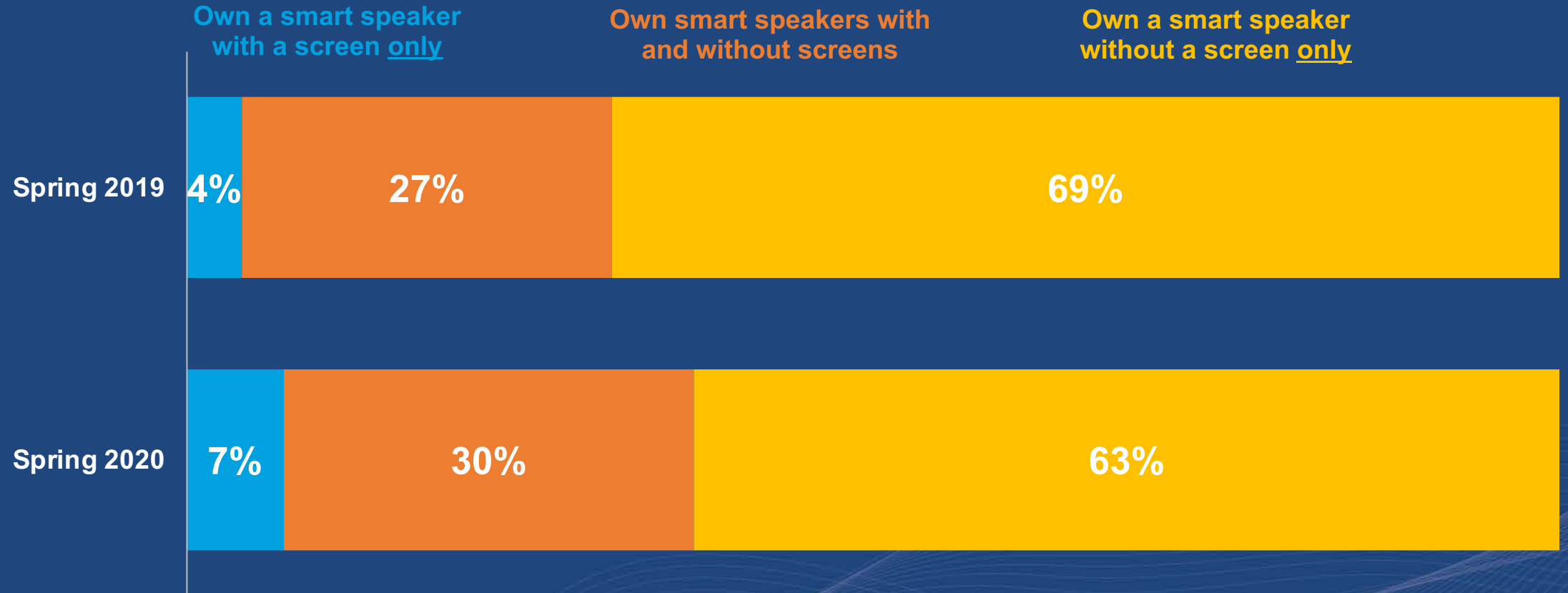


Spring 2019

Base: Own a smart speaker

Smart speaker owners

Type of smart speaker owned



Base: Own a smart speaker

Smart speaker non-owners

How likely are you to purchase a voice-enabled smart speaker that comes **with a video screen** in the next six months?

Very likely Somewhat likely Not at all likely

Smart speaker non-owners

8%

22%

70%

Smart speaker non-owners,
voice command users

15%

33%

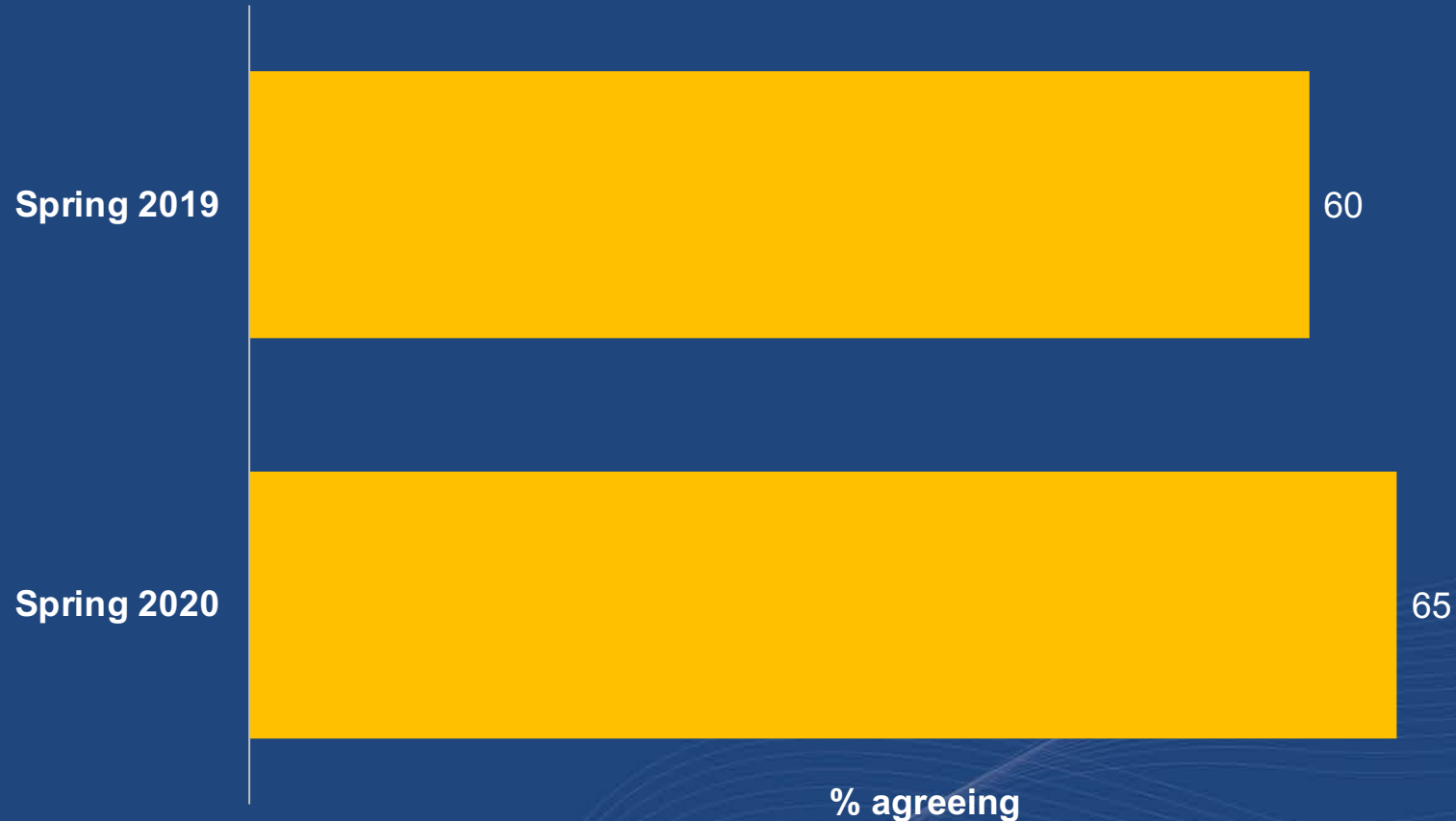
52%

Spring 2020

Base: Smart speaker non-owners

Own a smart speaker with a screen

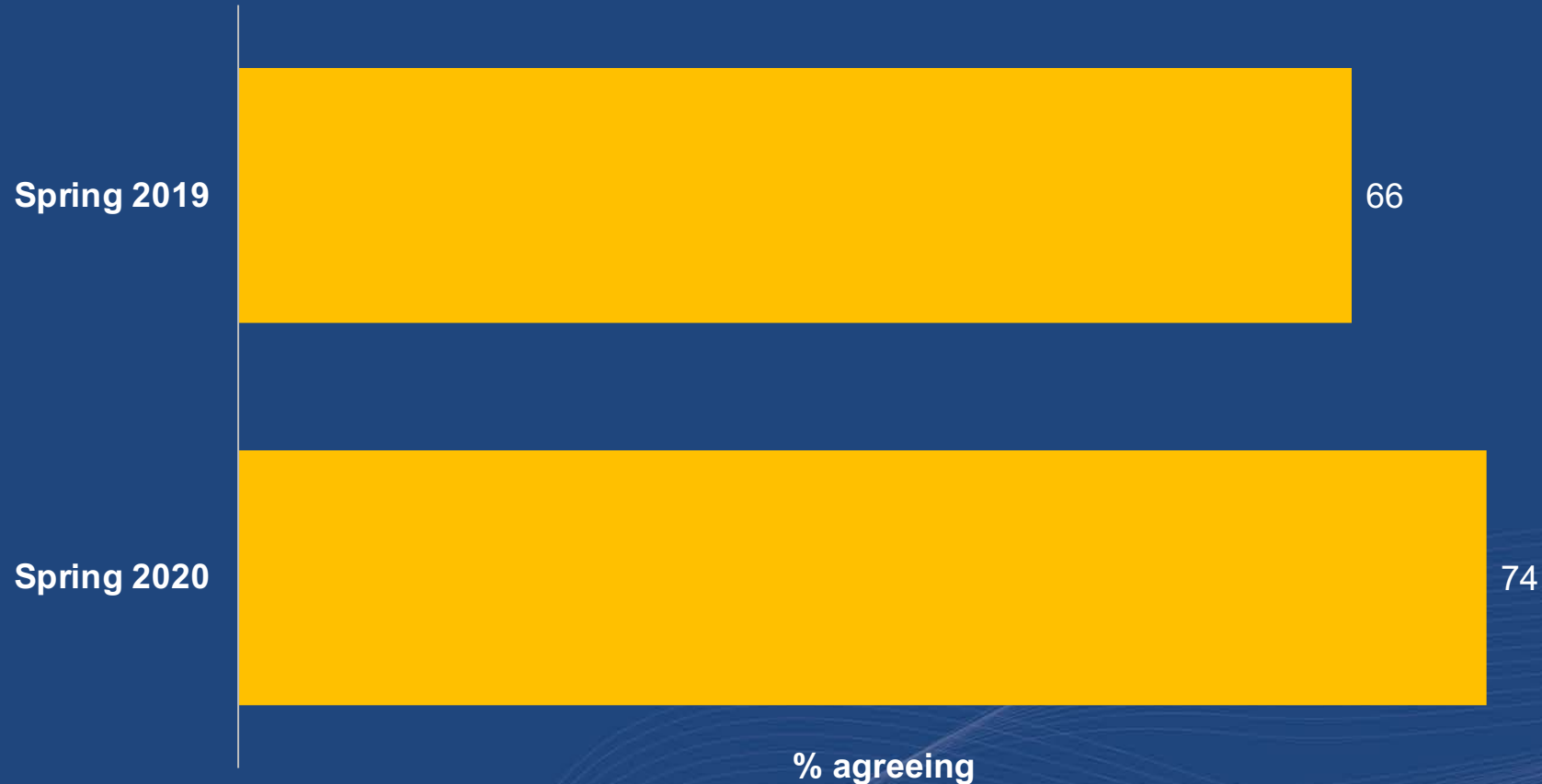
% who agree: “You prefer your smart speaker with a screen over a smart speaker without a screen”



Base: Own a smart speaker with a screen

Own a smart speaker with a screen

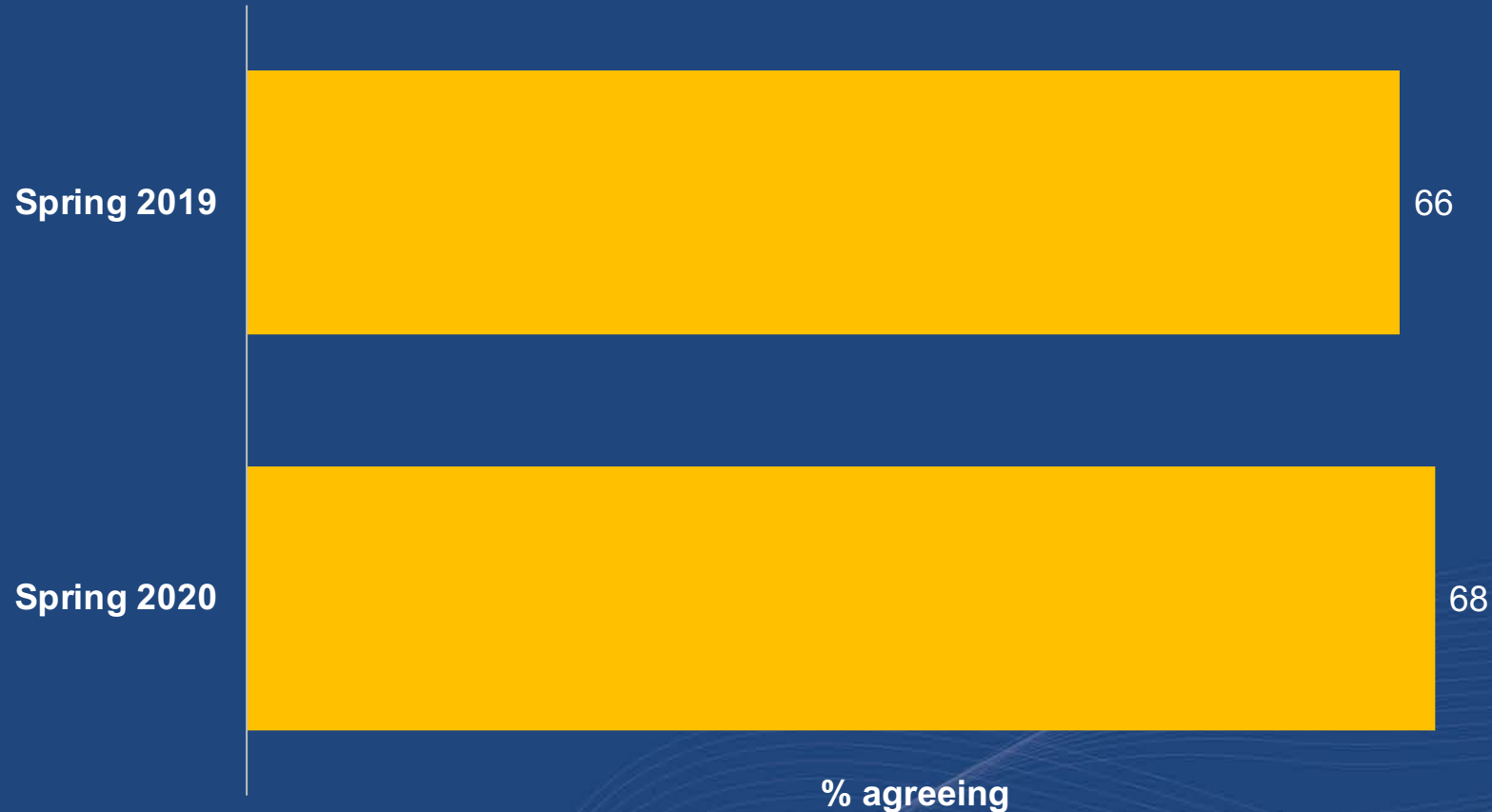
% who agree: “Having a screen on your smart speaker makes it easier to use”



Base: Own a smart speaker with a screen

Own a smart speaker with a screen

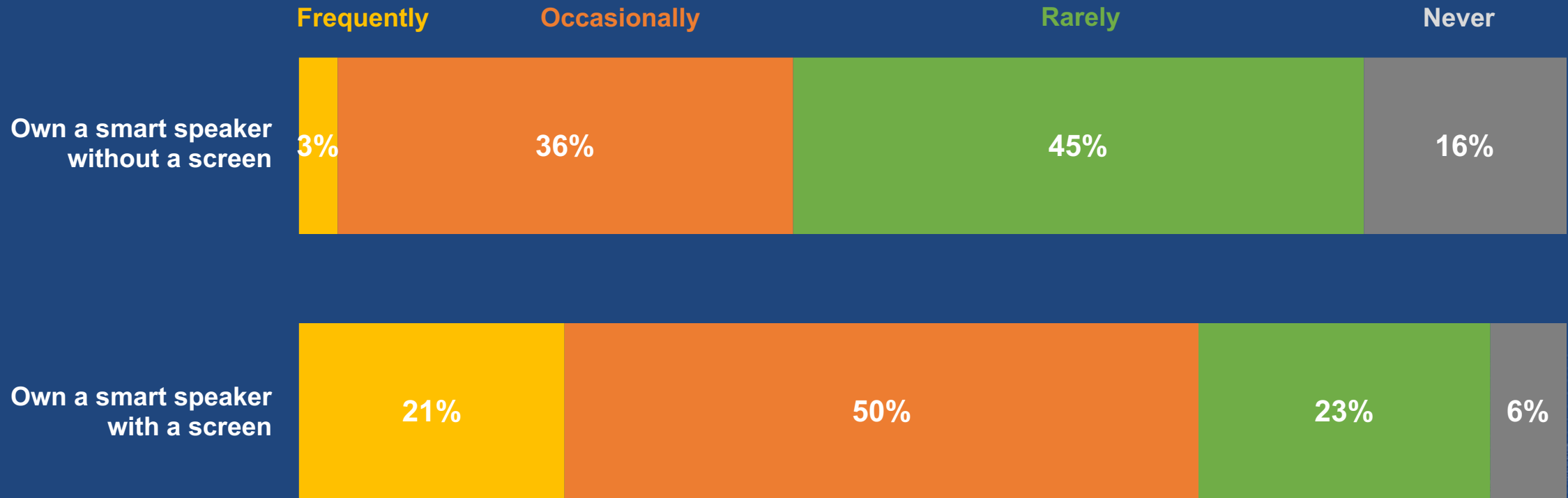
% who agree: “The screen on your smart speaker has made it easier to discover new content”



Base: Own a smart speaker with a screen

Smart speaker owners

How often do you seek out new skills or actions to use on your smart speaker?



Spring 2020

Base: Own a smart speaker

COVID-19 Related Behaviors

Smart speaker owners with children under 18 in household
**% who agree: “You want to buy another smart speaker
to entertain children in more rooms of the house”**



Base: Smart speaker owners with children under 18 in household

Smart speaker owners

% who ever listen to news on their smart speaker

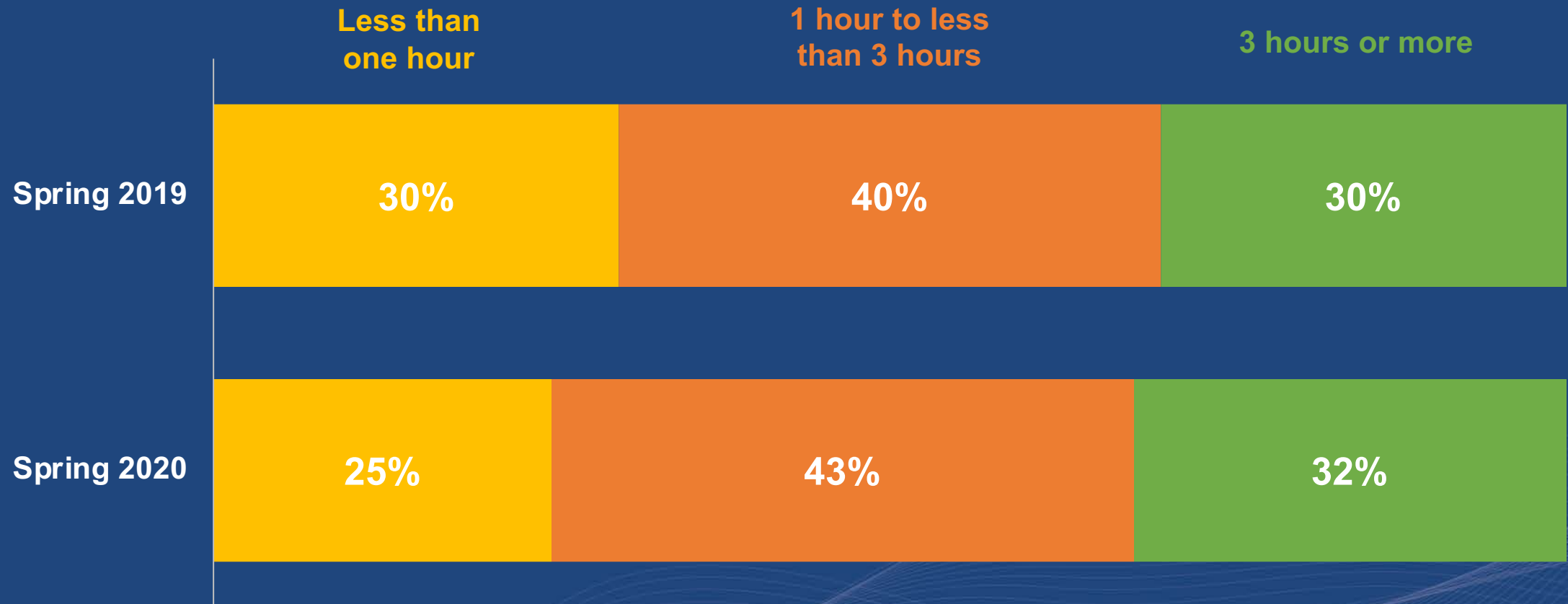


Spring 2020

Base: Own a smart speaker

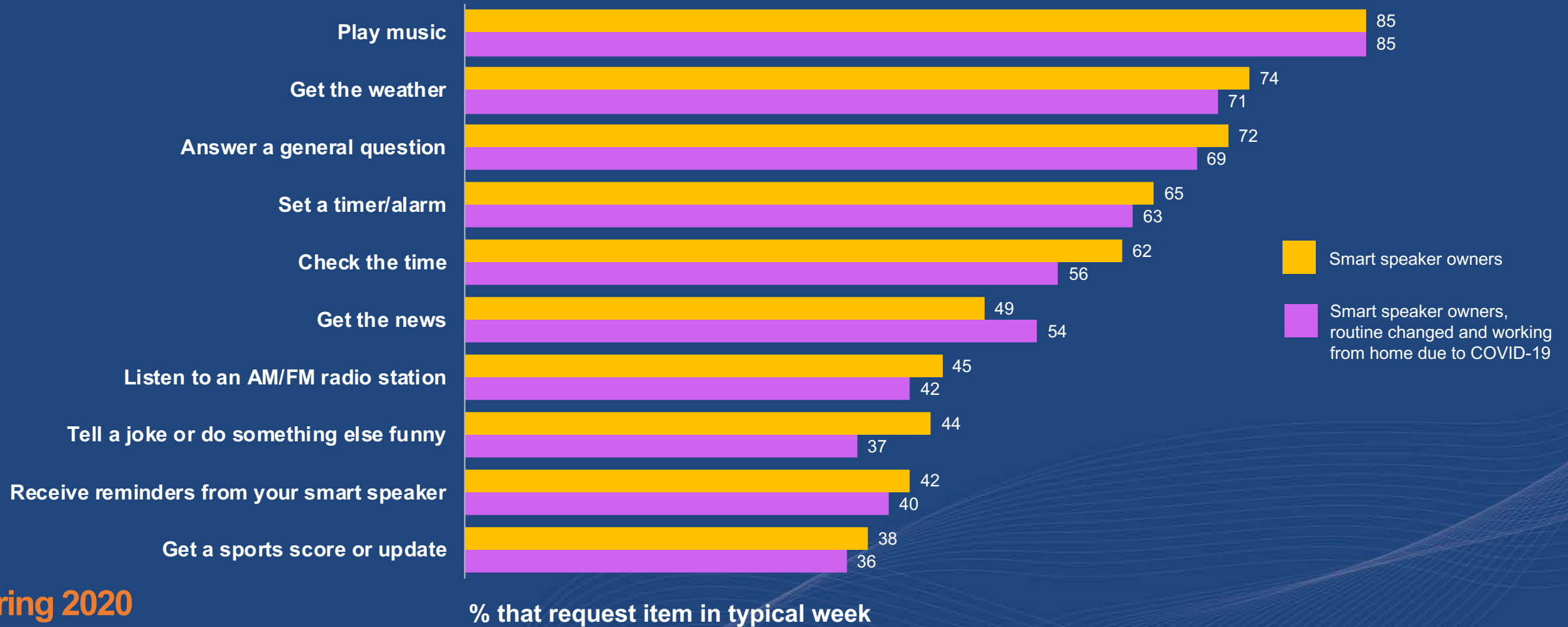
Smart speaker owners

Time spent listening to news on smart speaker in a typical week



Base: Own a smart speaker and listen to news programming on their smart speaker in a typical week

Top ten weekly smart speaker requests



Spring 2020

Base: Smart speaker owners

% who ever listen to news on their smart speaker

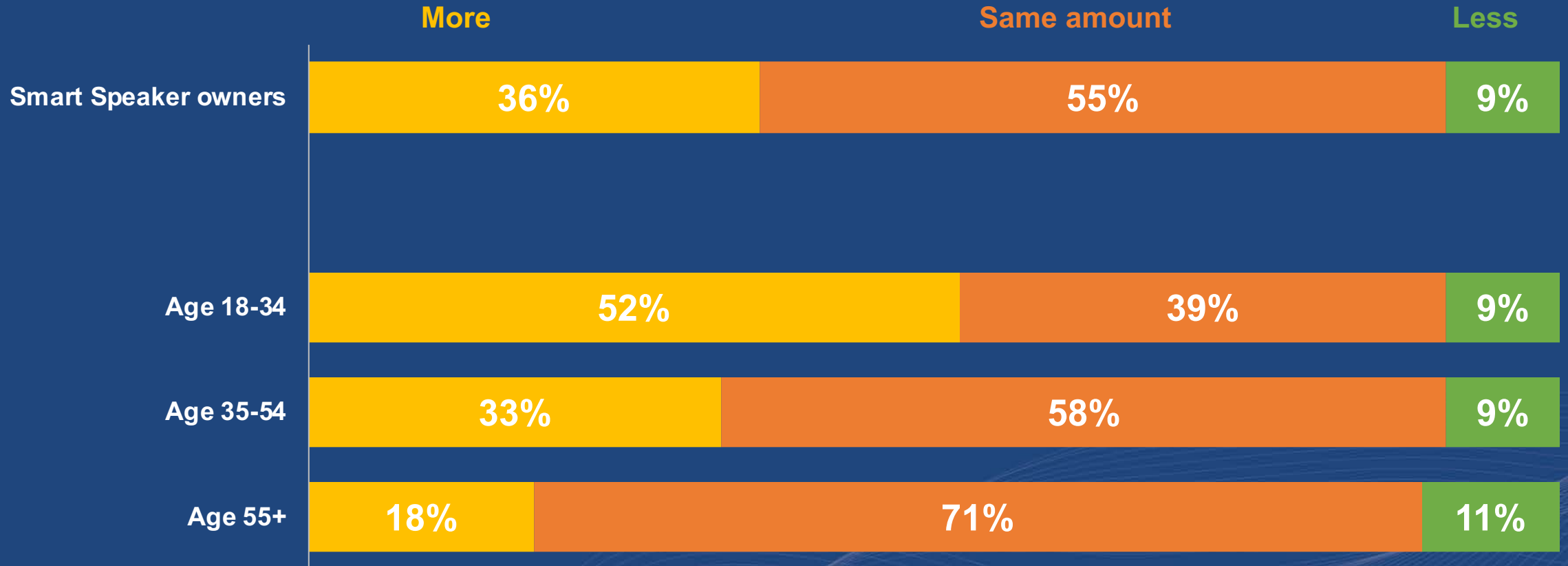


Spring 2020

Base: Own a smart speaker

Smart speaker owners

Compared to before the COVID-19 outbreak, would you say you are using your smart speaker to listen to music and entertainment more, less or about the same?

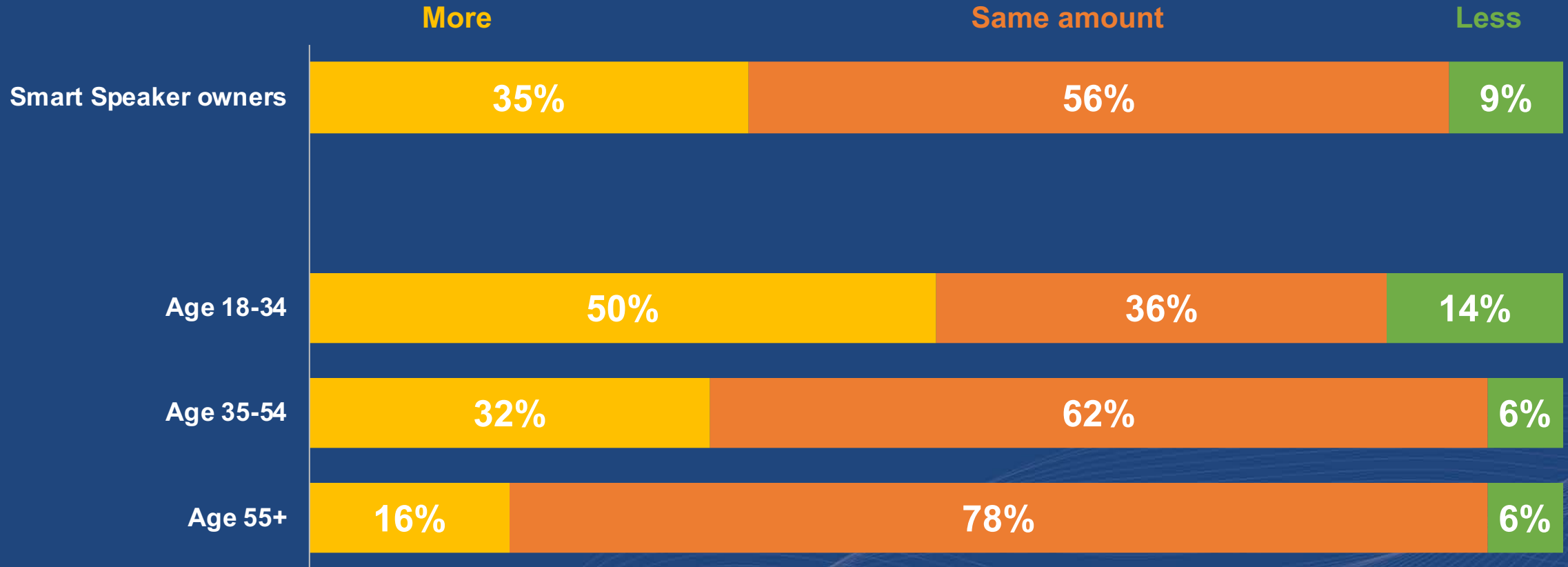


Spring 2020

Base: Own a smart speaker

Smart speaker owners

Compared to before the COVID-19 outbreak, would you say you are using your smart speaker to listen to news and information more, less or about the same?



Spring 2020

Base: Own a smart speaker

Takeaways

- Three-quarters of Americans 18+ say their routines have changed due to COVID-19, and their media habits have changed in response
- News is more important than ever with those who have experienced the most disruption
- Young people in particular are listening to more news as a result of the pandemic, with 50% of 18-34s indicating increased news consumption since the onset of COVID-19

Takeaways

- Voice assistant technology is in a state of evolution, not revolution, as people are using more kinds of skills and using the technology on speakers, TVs, and other devices
 - 63% of the total U.S. online population 18+ say they use voice-operated personal assistants of any kind
- The voice technology in smart speakers is seen as slightly better than the same technology in smartphones, which may be due to operating systems, and environmental factors

Takeaways

- Smart speakers with screens play a crucial role in skill discovery; audio-first devices are perceived as easier to use than audio-only devices
- Among non-owners of smart speakers, those who currently use voice assistants are 60% more likely than those who don't to purchase a smart speaker in the next six months

THE **smart
audio** REPORT

npr.org/smartaudio

