



The Future of Voice

From Smartphones to Smart Speakers to Smart Homes

Susan Engleson

SR. DIRECTOR, EMERGING PRODUCTS

Agenda

- **Smartphones:** Adoption of Voice Technology
- **Smart Speakers:** A Product Built for Voice
- **Smart Homes:** Emerging Voice-Integrated Products
- **Key Takeaways + Q&A**

About this analysis

- **comScore Connected Home™** delivers insight into the usage of all internet-connected devices in the home – including IoT
- The foundation of this data source is the **comScore Total Home Panel™**, a true single-source research platform designed to measure the realities of cross-platform media consumption today. Geographically distributed in the U.S. and weighted to U.S. homes with Wi-Fi (94M homes)
- This presentation also incorporates data from U.S. custom surveys fielded in Q2 (851 respondents) and October 2017 (2,272 respondents)
- Key contributors to this webinar:
 - Brandon Burr – *Director, Emergent Products*
 - Autum Molay – *Product Marketing Manager, TV & Cross-Platform*

Smartphones

Adoption of Voice Technology



In the U.S., there are 179 million smartphone users spending an average of 2.6 hours per day on their device

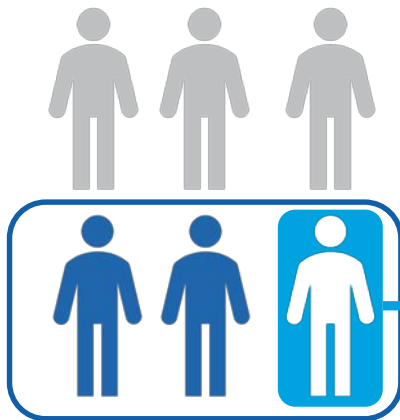




Half of smartphone users engage with voice technology on their device, and many of them use the feature habitually

1 in 2

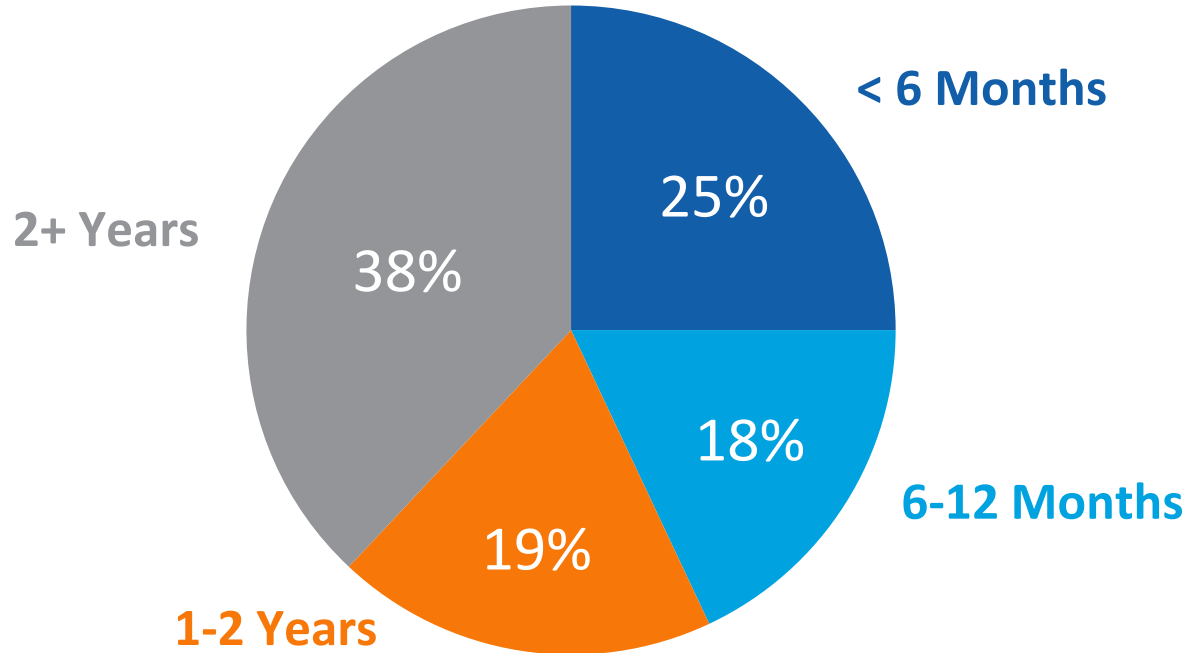
use voice technology
on smartphone



1 in 3
voice technology users
use voice technology
daily

43% of voice users began using the technology within the last year

Users' Length of Time Using Voice Technology on Smartphone





Voice technology is here to stay: Nearly half expect to increase use

How do you expect your usage of voice technology to change?

Increase

Stay the Same

Decrease



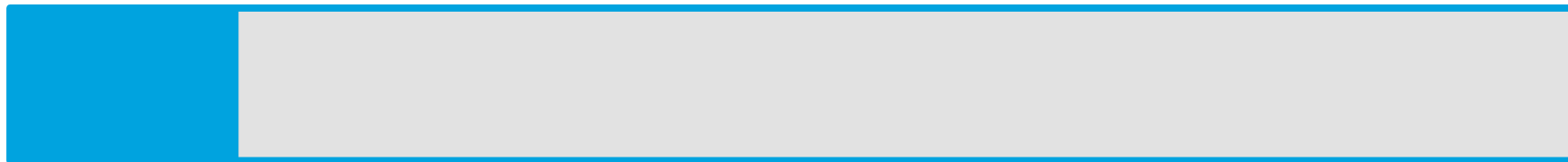
Smartphone voice usage is a leading indicator of smart speaker purchase intent

42% of **voice tech smartphone users** intend to purchase a smart speaker



while only...

15% of **non-voice tech smartphone users** intend to purchase a smart speaker



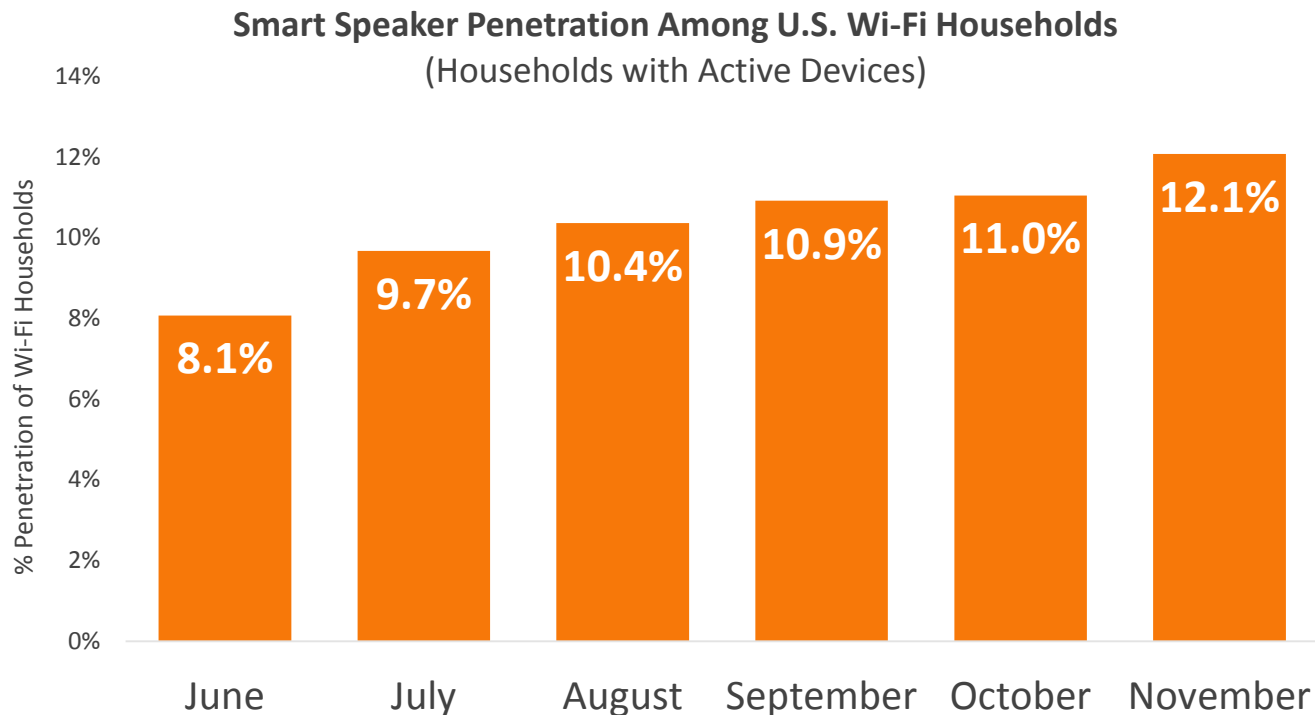
Smart Speakers

A Product Built for Voice



U.S. smart speaker penetration has been steadily increasing, with particularly strong growth in recent months

Households with smart speakers
+49%
in 5 months





Not only do more households have smart speakers, current smart speaker households are adding more devices

In June

20%

**of homes with smart
speakers had multiple
smart speakers**

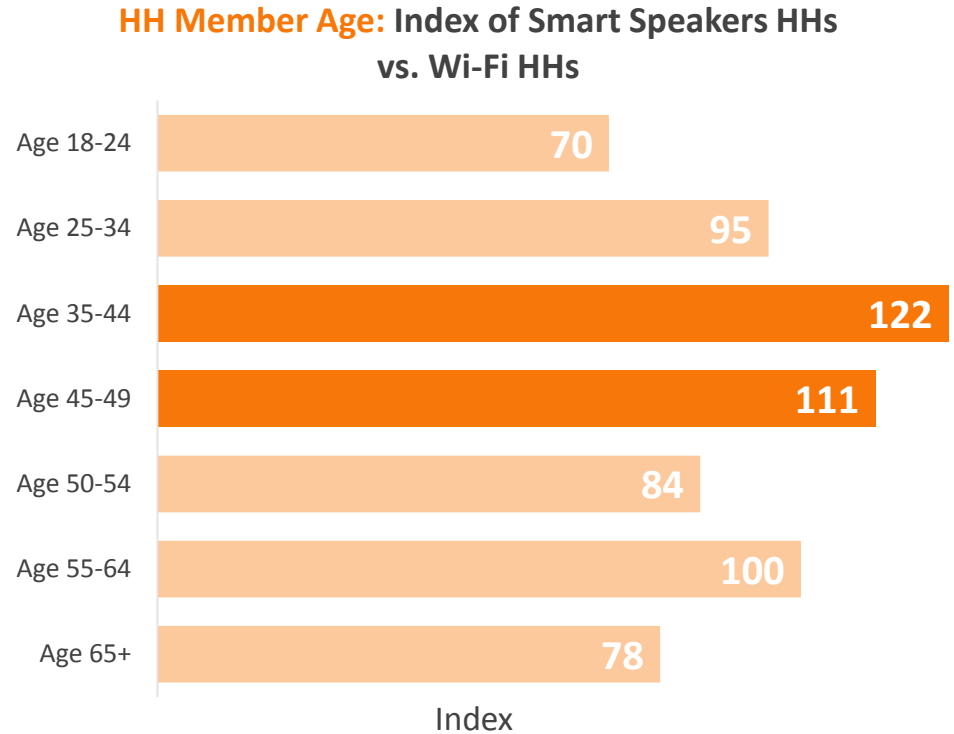
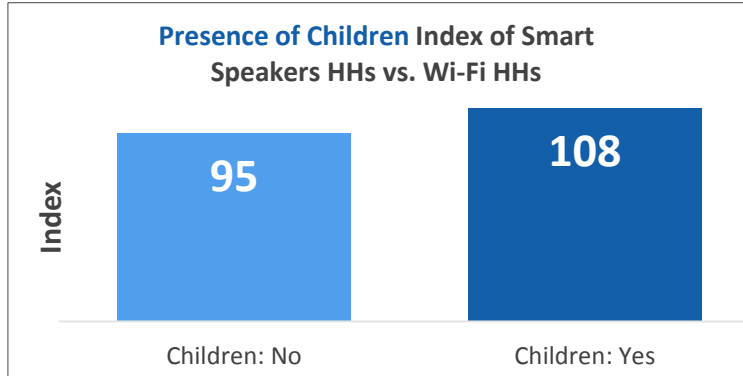
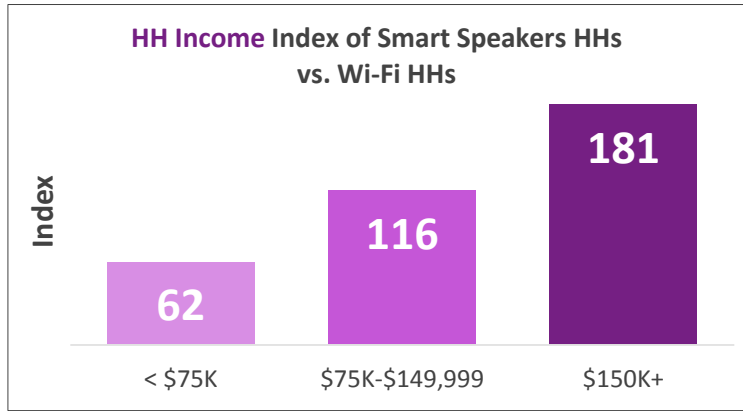
In October

25%

**of homes with smart
speakers had multiple
smart speakers**

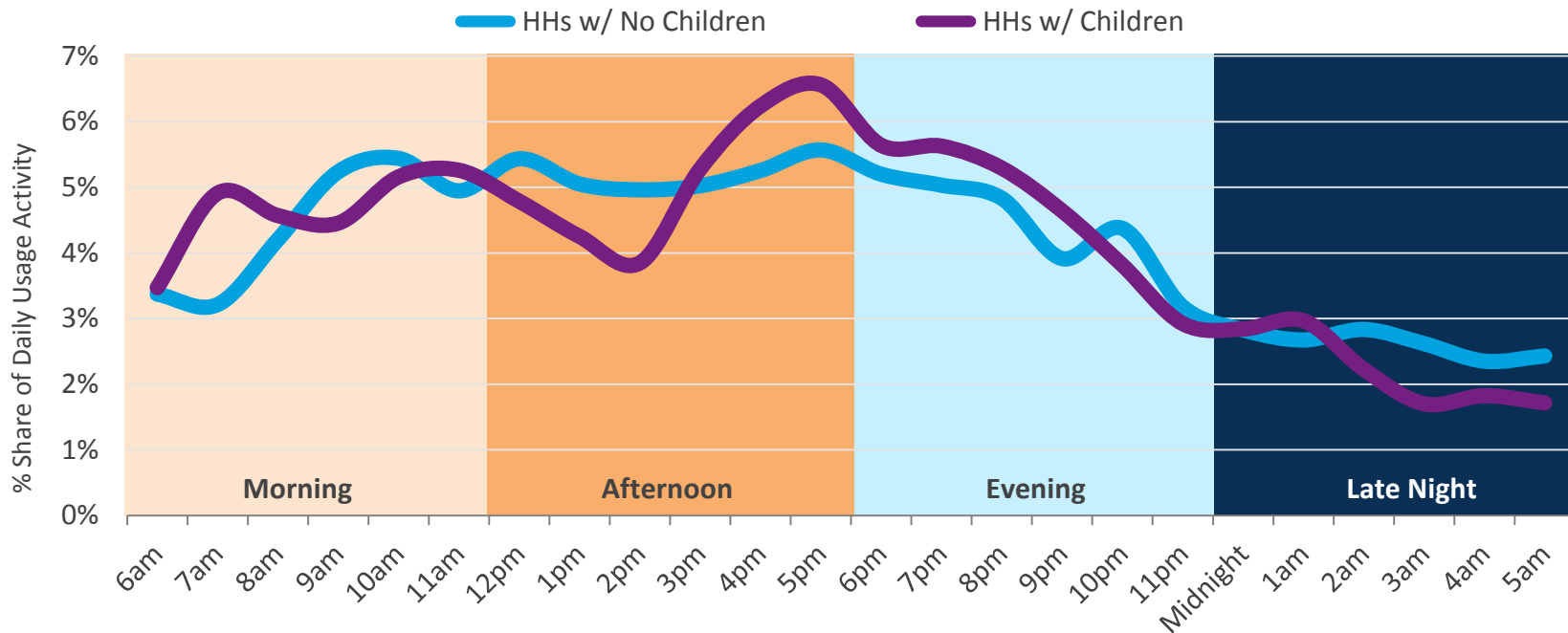


Smart speakers are more prevalent in households with a higher income, children in the home and at least one person 35-49 years-old



Households with children have more defined peaks of smart speaker activity in the early morning and late afternoon

Smart Speaker Share of Usage Activity by Daypart*



Amazon and Google lead the smart speaker market

amazon echo



Echo
\$79.99

Current discount: \$20



Echo Dot
\$29.99

Current discount: \$20



Spot
\$129.99

*releases 12/19
sold out for December*



Plus
\$119.99

Current discount: \$30



Show
\$149.99

Current discount: \$80



Look
\$199.99

Invite Only

amazon tap



Tap
\$79.99

Current Discount: \$50

Google Home



Home
\$79



Mini
\$29

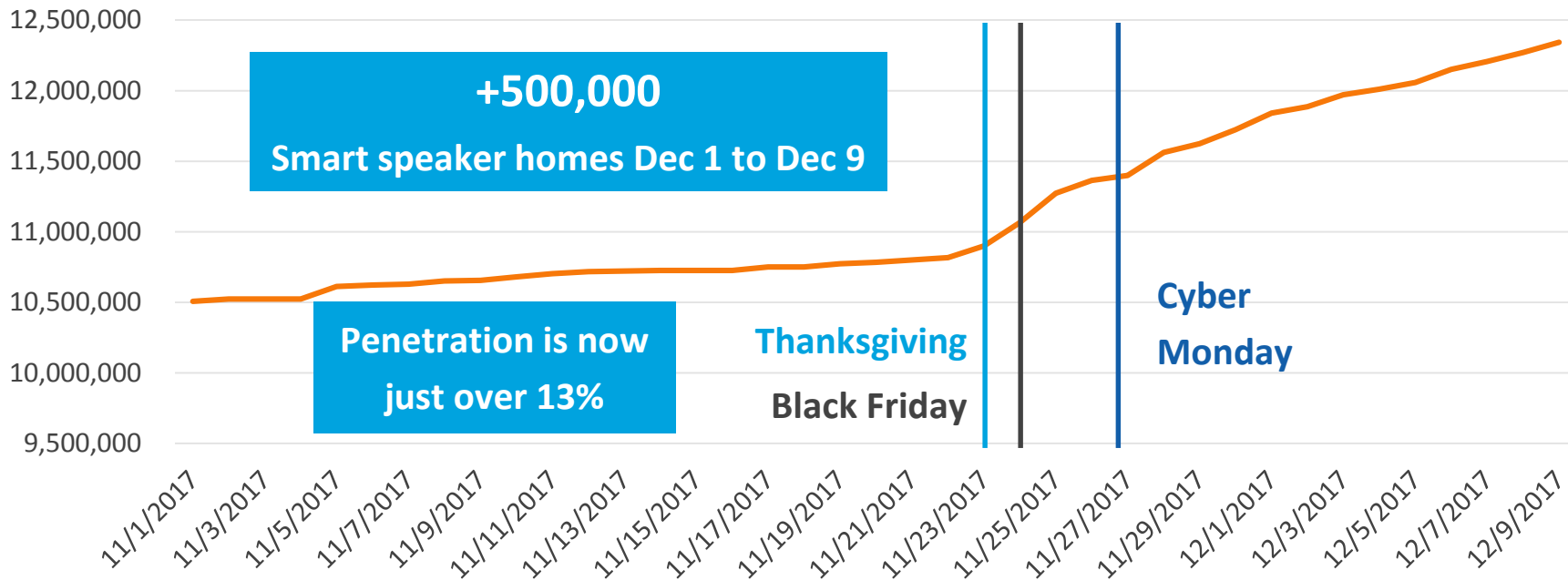


Max
\$399



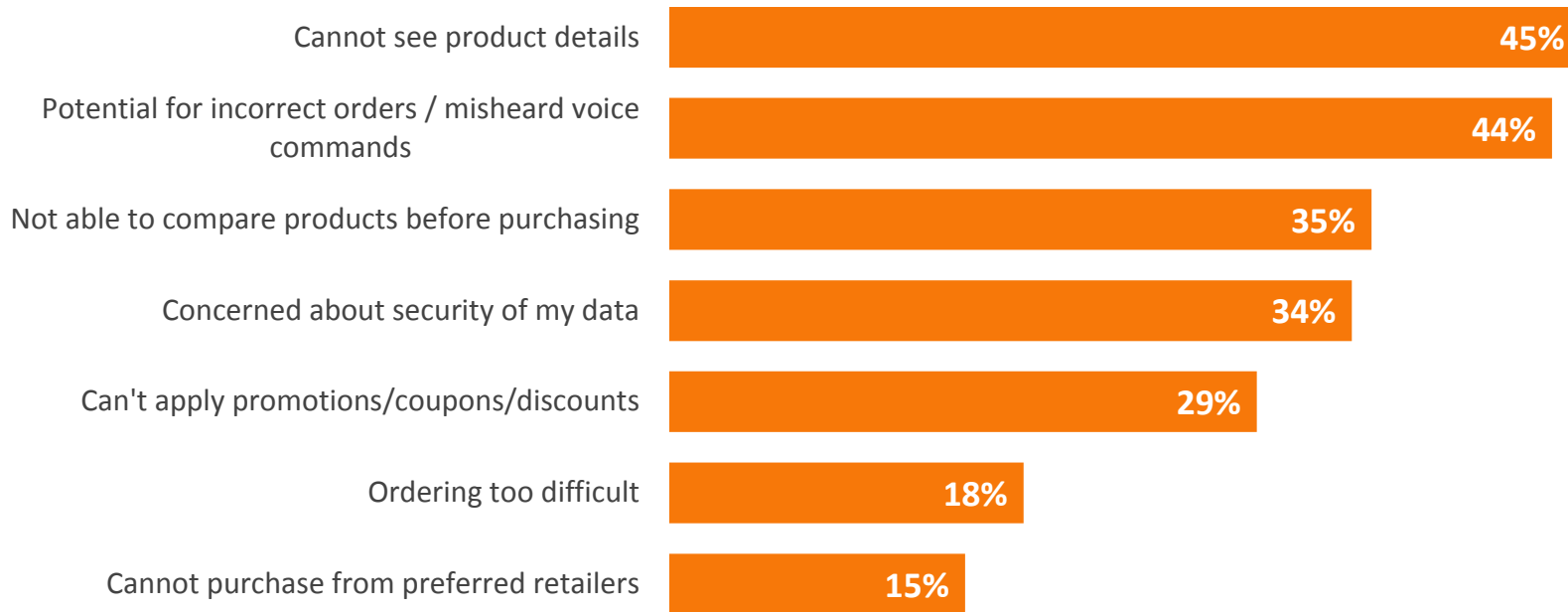
Holiday sales have already driven a significant increase in the number of homes with an active smart speaker

US Households with Active Smart Speakers



Speaking of holiday shopping... smart speaker owners are hesitant to use them for buying products because they don't yet trust the process

Reasons for Not Making a Purchase on Smart Speakers



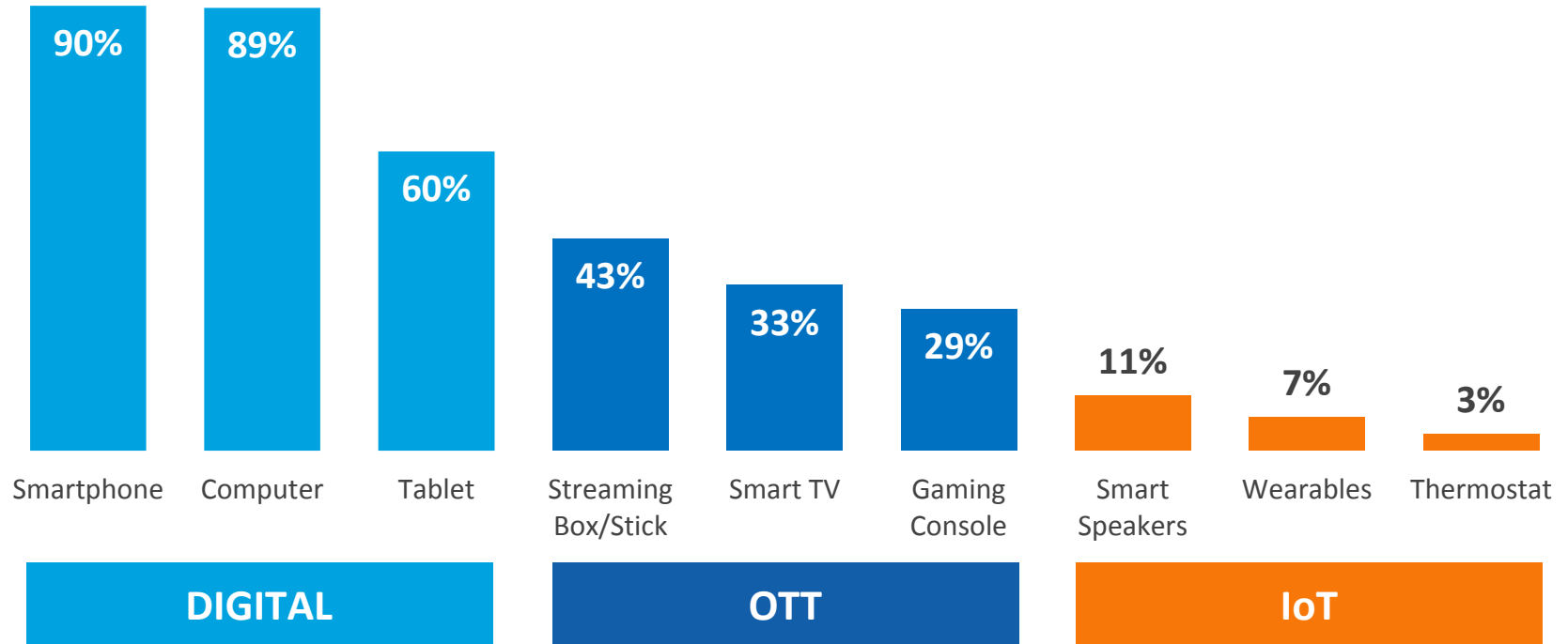
Smart Homes

Emerging Voice-Integrated Products



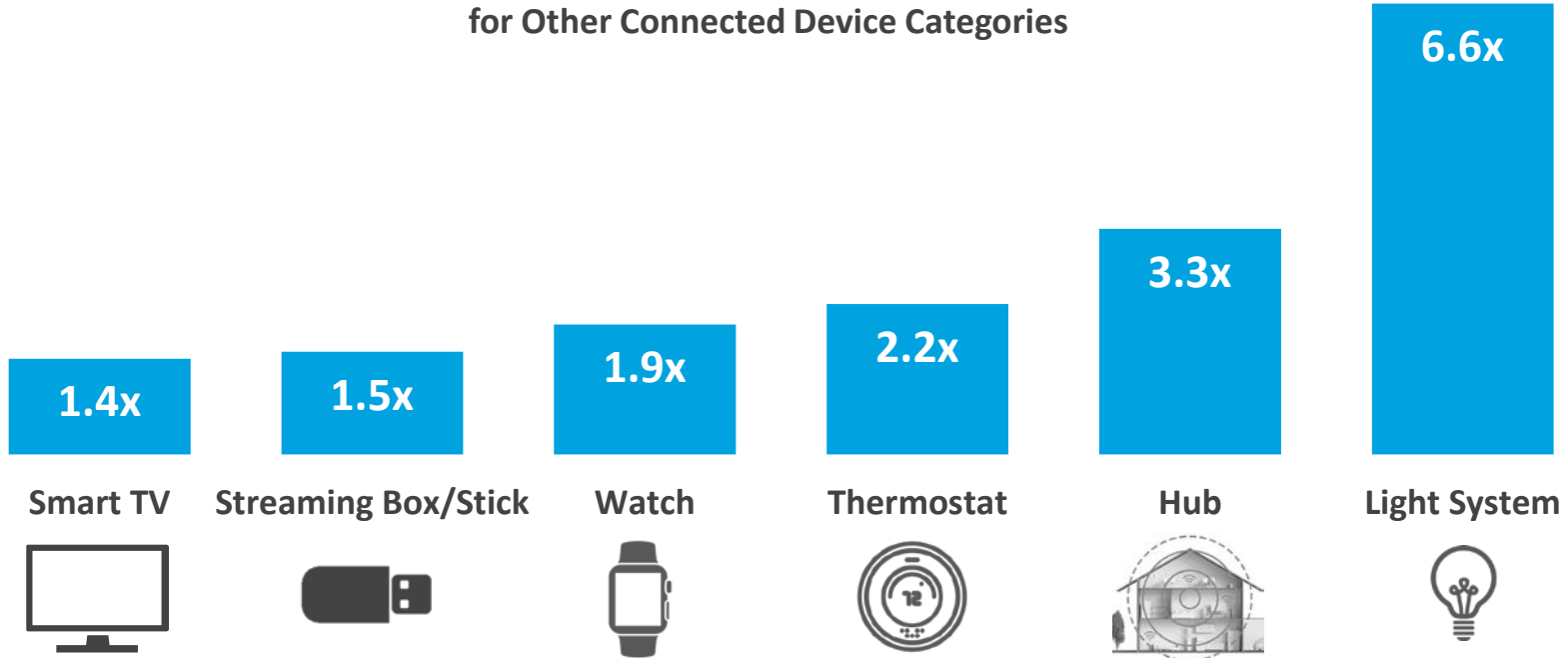
The modern home features a multitude of connected devices

Active Device Penetration Among U.S. Wi-Fi Households, October 2017



Smart speaker homes have a much higher likelihood of using other smart devices

Smart Speaker Household Over Index for Other Connected Device Categories



Smart speakers, bundled with other smart devices, will further increase IoT adoption and highlight smart speaker utility

- **Amazon**

- For various Echo devices, add a TP-Link smart plug for \$5
- Dot + Logitech Harmony Home Hub – Dot is effectively \$5
- Free Philips Hue bulb with Echo Plus

- **Various Retailers**

- Free Google Home Mini with \$99+ Nest purchase

- **Target Last Week:** Save \$20 on Google Home Mini with WeMo Mini





Smart speaker homes show brand affinity for streaming devices

amazon echo
Households

More than **2X** as likely as
the average household
to have Fire TV



Google Home
Households

Almost **4X** as likely as
the average household
to have Chromecast






Beyond just streaming devices, voice control for TV may revolutionize video content discovery and navigation

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"There sure is. Tell our voice remote what you want and it's on. Search Live TV, On Demand & Netflix."

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*Internet connection, active subscription and Voice Remote are required to use voice feature.



Key Takeaways + Q&A

Key Takeaways

1

Mass adoption in smartphone voice technology is paving the way for the voice era

- 1-in-2 smartphone users now use voice technology
- Half of all users expect to increase their voice technology usage
- Users of voice technology on a smartphone have 3x greater intention to purchase a smart speaker for their home

2

Smart speakers are already the #1 IoT category in the home, with more growth expected

- Households with smart speakers increased 49% from June to November
- Smart speakers are currently in 13% of US wi-fi homes
- 25% of those homes are using multiple smart speakers
- New product offerings and lower prices will drive increased adoption

3

Smart speakers are the gateway to the fully-automated smart home

- Smart speaker users are 2-6X more likely to use smart home devices like thermostats, hubs, and light systems
- Smart speaker/smart home bundle promotions and discounts will move smart home technology beyond early adopters

Closing thoughts

- **Voice technology is poised to permeate all aspects of our lives** – at home, at work, and on the go
- Just a few of the industries that could potentially be **impacted or disrupted**: retail, consumer goods, restaurants, automotive, electronics manufacturers, content creation and distribution, financial services, utilities, advertising
- Smart technology, ushered in by voice technology adoption, has the **potential to improve lives**: help seniors age in place, reduce energy usage, improve health outcomes, and much more

Thank you!

A copy of the presentation and recording of the webinar will be available within three business days.

Susan Engleson

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