

BESPOKE SURVEYS
Smart Speakers Volume 3
Hey Alexa or Okay Google

AUGUST 2017

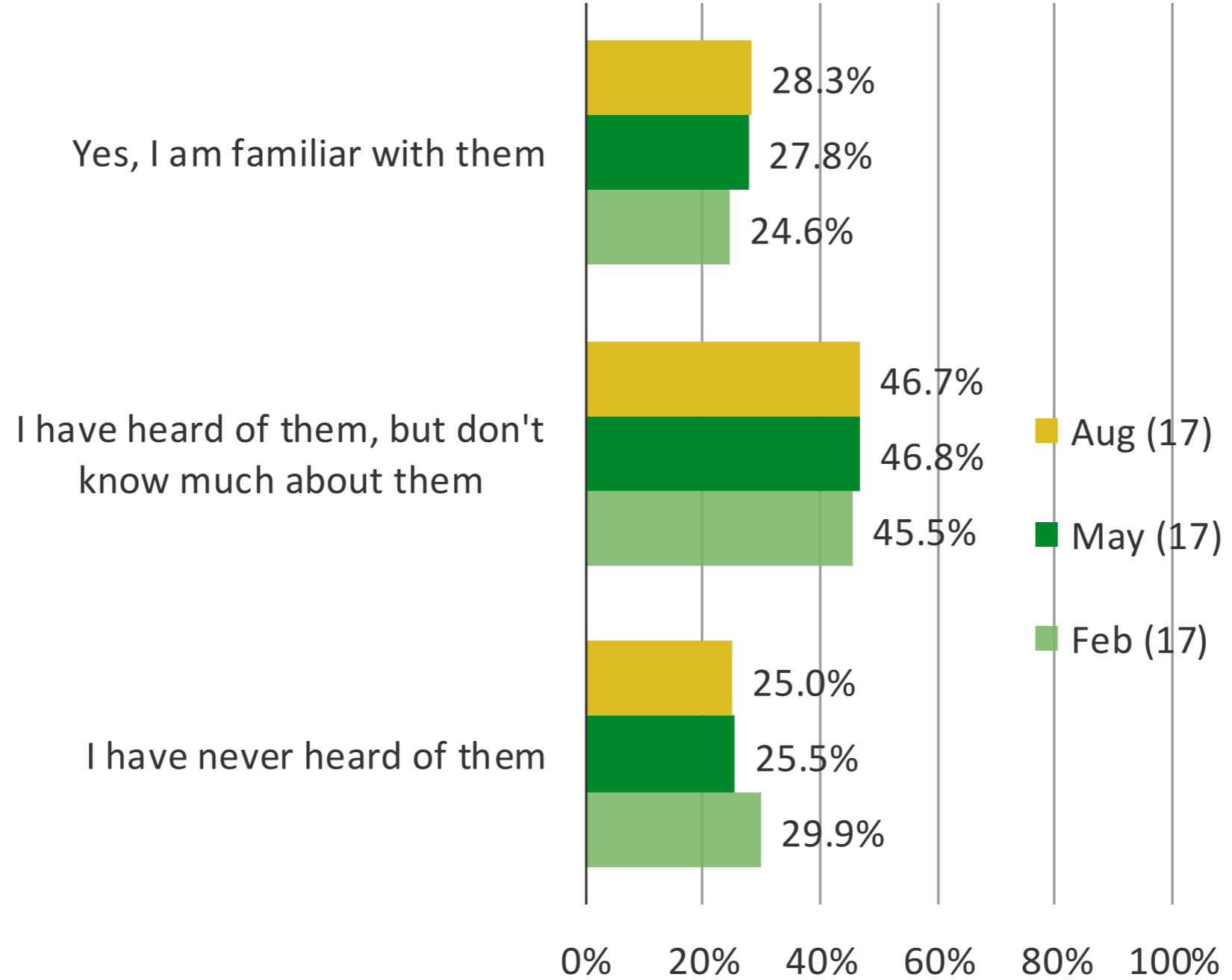
Hey Alexa or Okay Google

Sample: 1,500 US Consumers Balanced to Census.

The majority of respondents have at least heard of smart speakers. The data nudged slightly higher month over month.

ARE YOU FAMILIAR WITH WHAT SMART SPEAKERS ARE?

This question was posed to all consumers.



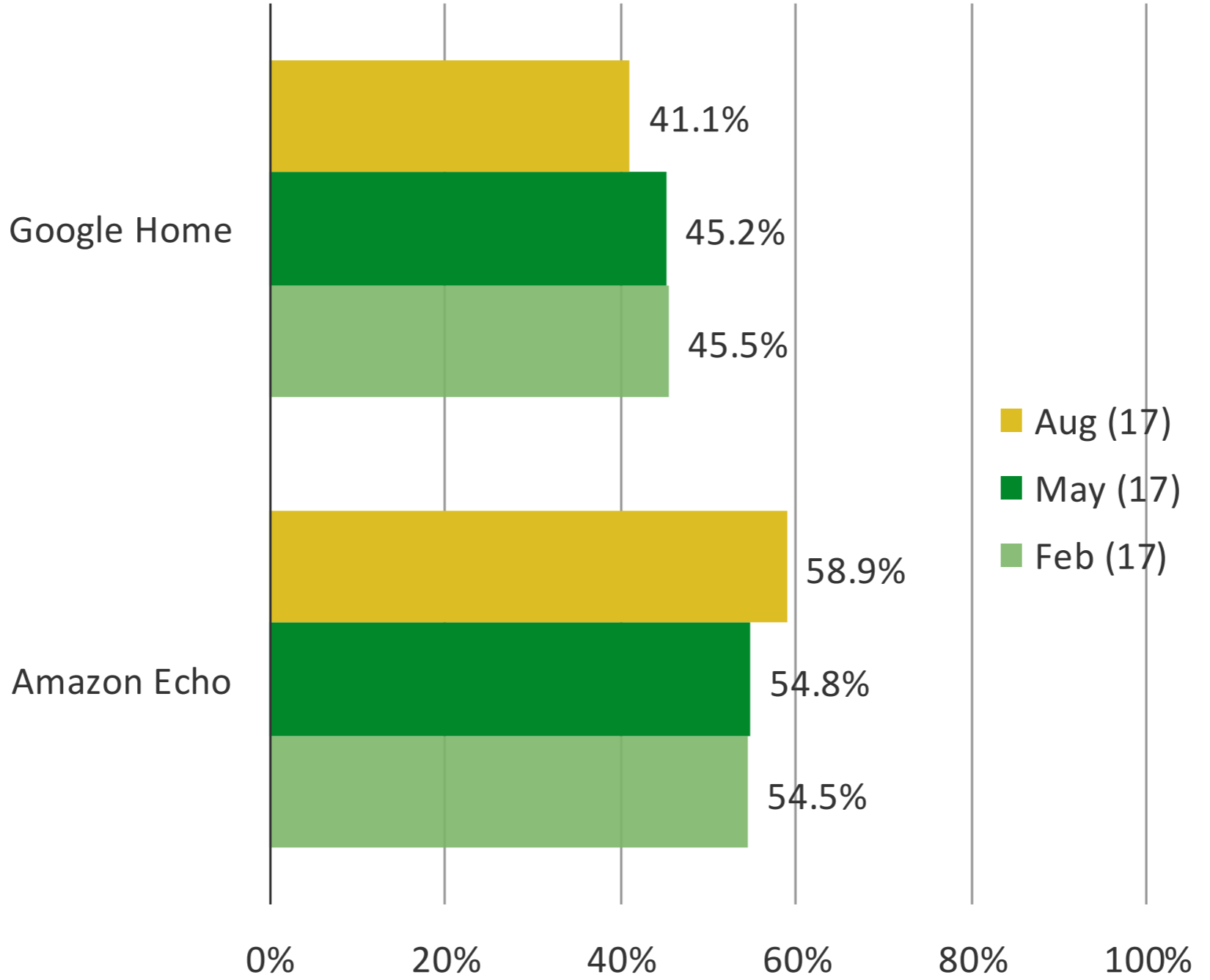
Hey Alexa or Okay Google

Sample: 1,500 US Consumers Balanced to Census.

For the third consecutive quarter, a higher percentage of respondents find the Echo to be more visually pleasing than the Google Home to display in their home or office.

WHICH OF THE FOLLOWING DO YOU THINK LOOKS MORE APPEALING VISUALLY TO DISPLAY AT HOME / OFFICE?

This question was posed to all consumers.



Respondents were shown images of each speaker without indication of which speaker was which and were asked to choose which is more visually appealing to display in your home or office.

Hey Alexa or Okay Google

Sample: 1,500 US Consumers Balanced to Census.

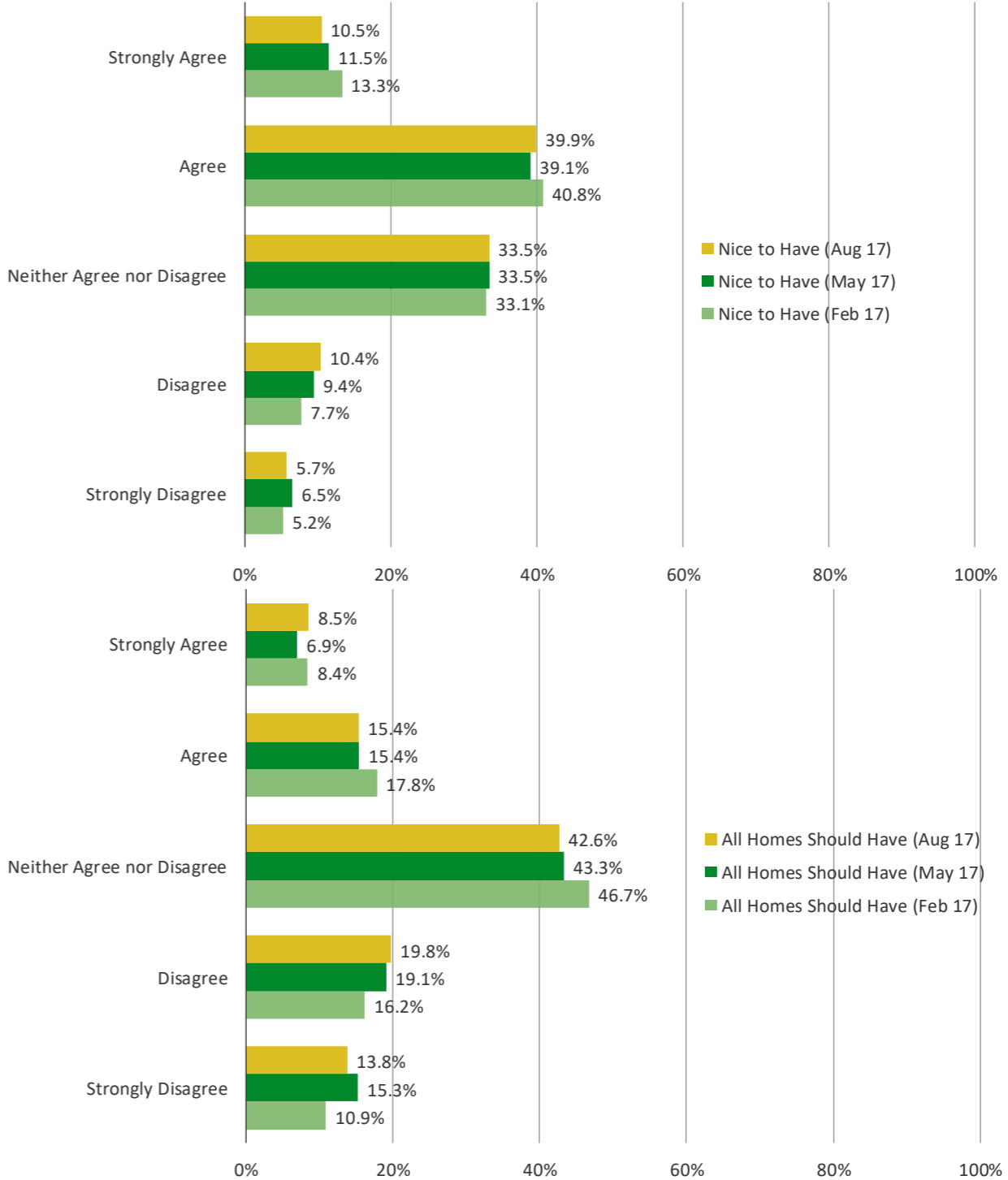
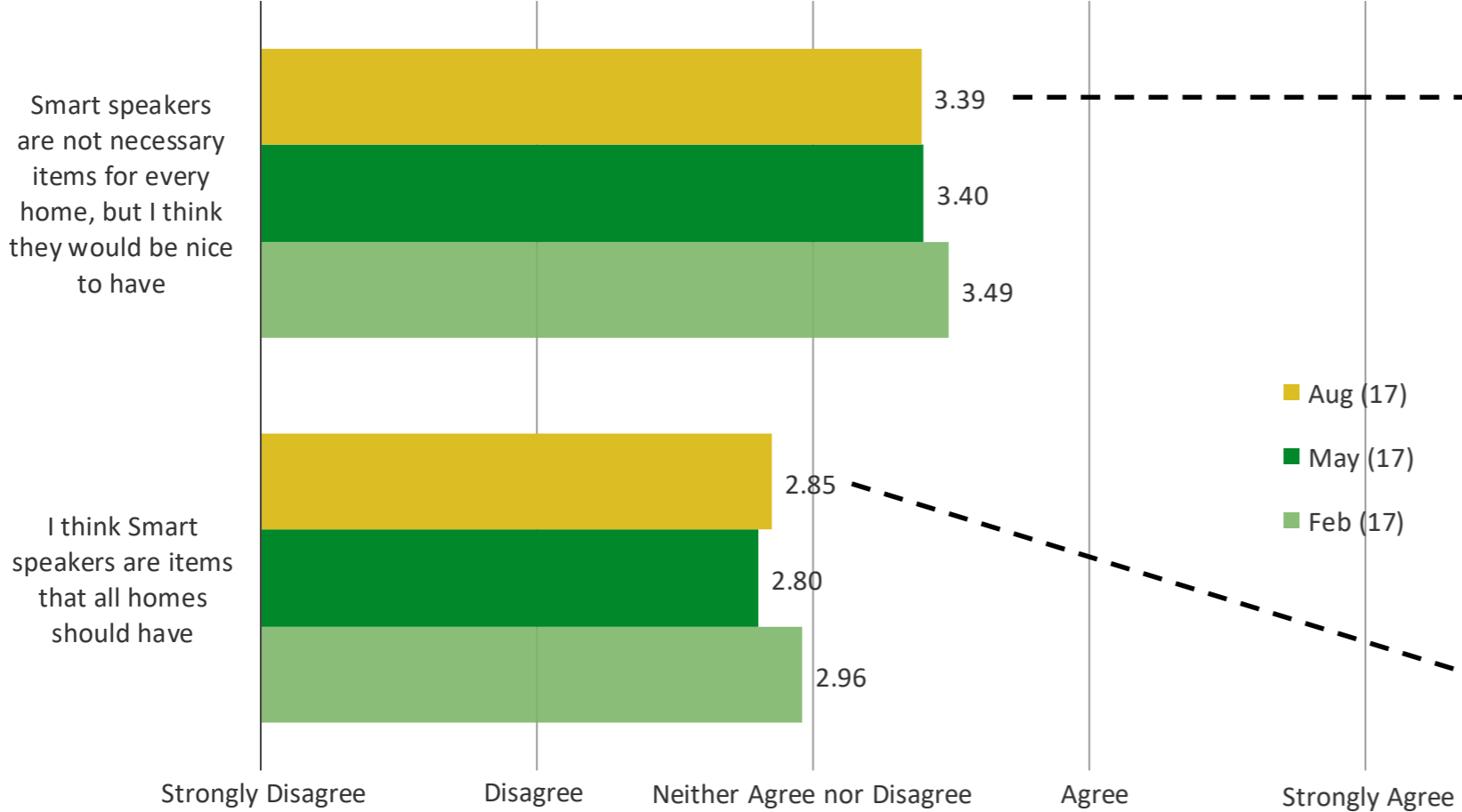
More nice to have than need to have... Respondents continue to feel that home speakers are more of a “nice to have” product than “need to have.”

CONSUMER OPINION OF SMART SPEAKERS (WEIGHTED AVERAGE)

CONSUMER OPINION OF SMART SPEAKERS (PERCENTAGES)

This question was posed to all consumers.

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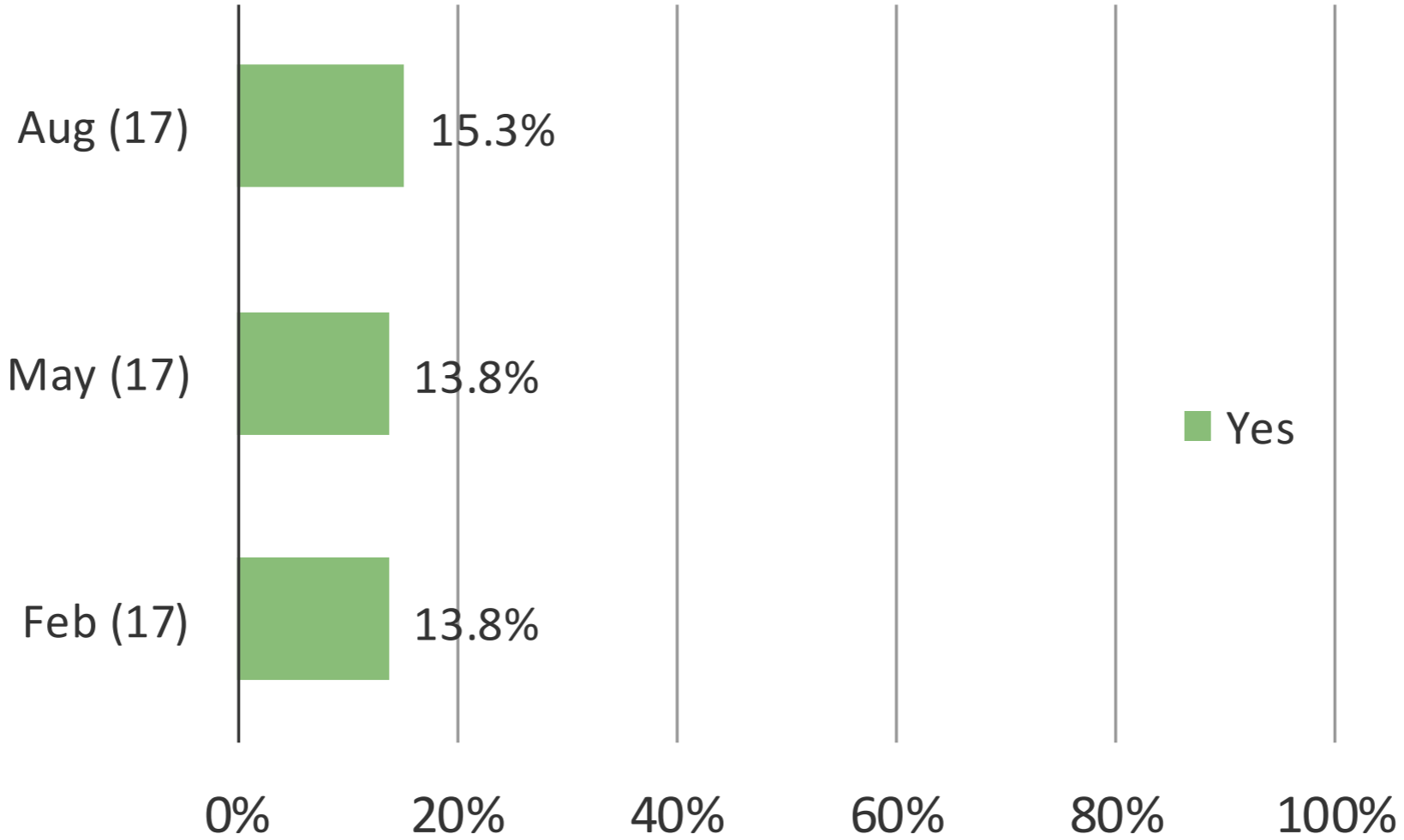
Hey Alexa or Okay Google

Sample: 1,500 US Consumers Balanced to Census.

15.3% of respondents have spent time researching the differences between Amazon Echo and Google Home, which is increased sequentially.

HAVE YOU SPENT ANY TIME RESEARCHING DIFFERENCES BETWEEN AMAZON ECHO AND GOOGLE HOME?

This question was posed to all consumers.



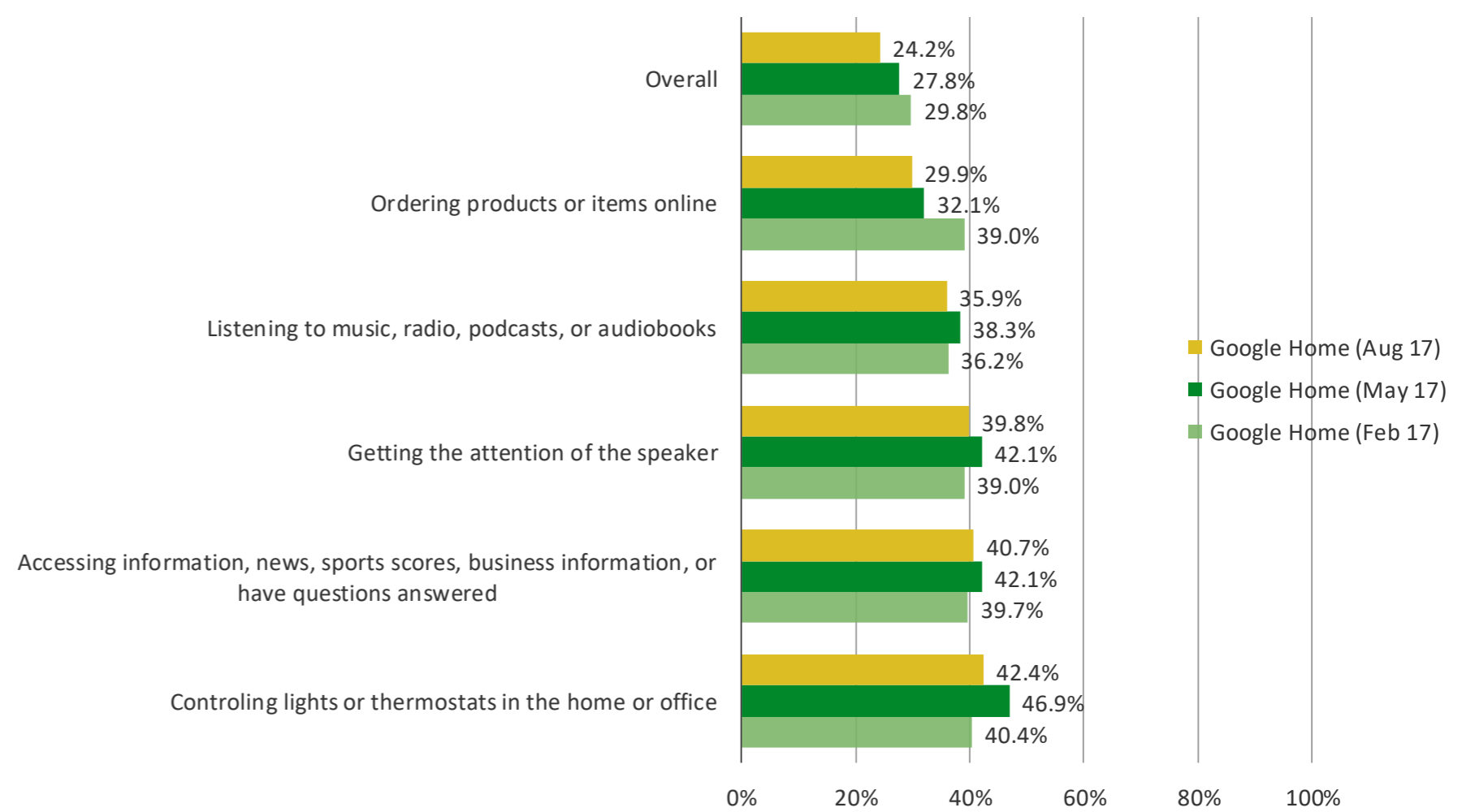
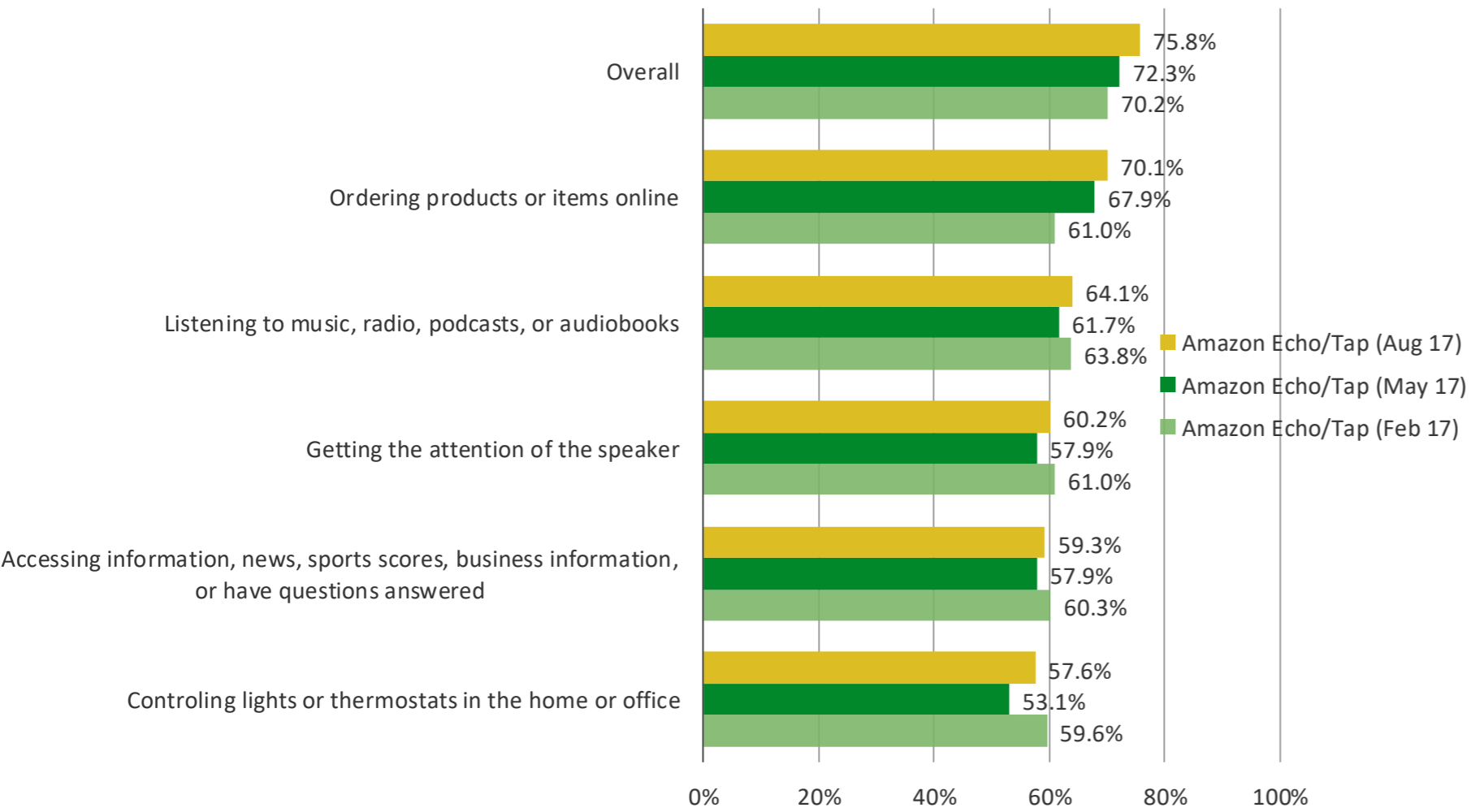
Hey Alexa or Okay Google

Sample: 1,500 US Consumers Balanced to Census.

A majority of respondents lean toward the Echo overall and for each specific individual smart speaker function tested. The data has improved for the Echo sequentially and has worsened for the Google Home.

WHICH DO YOU THINK IS BETTER FOR THE FOLLOWING?

This question was posed to respondents who have researched Echo vs. Google Home.



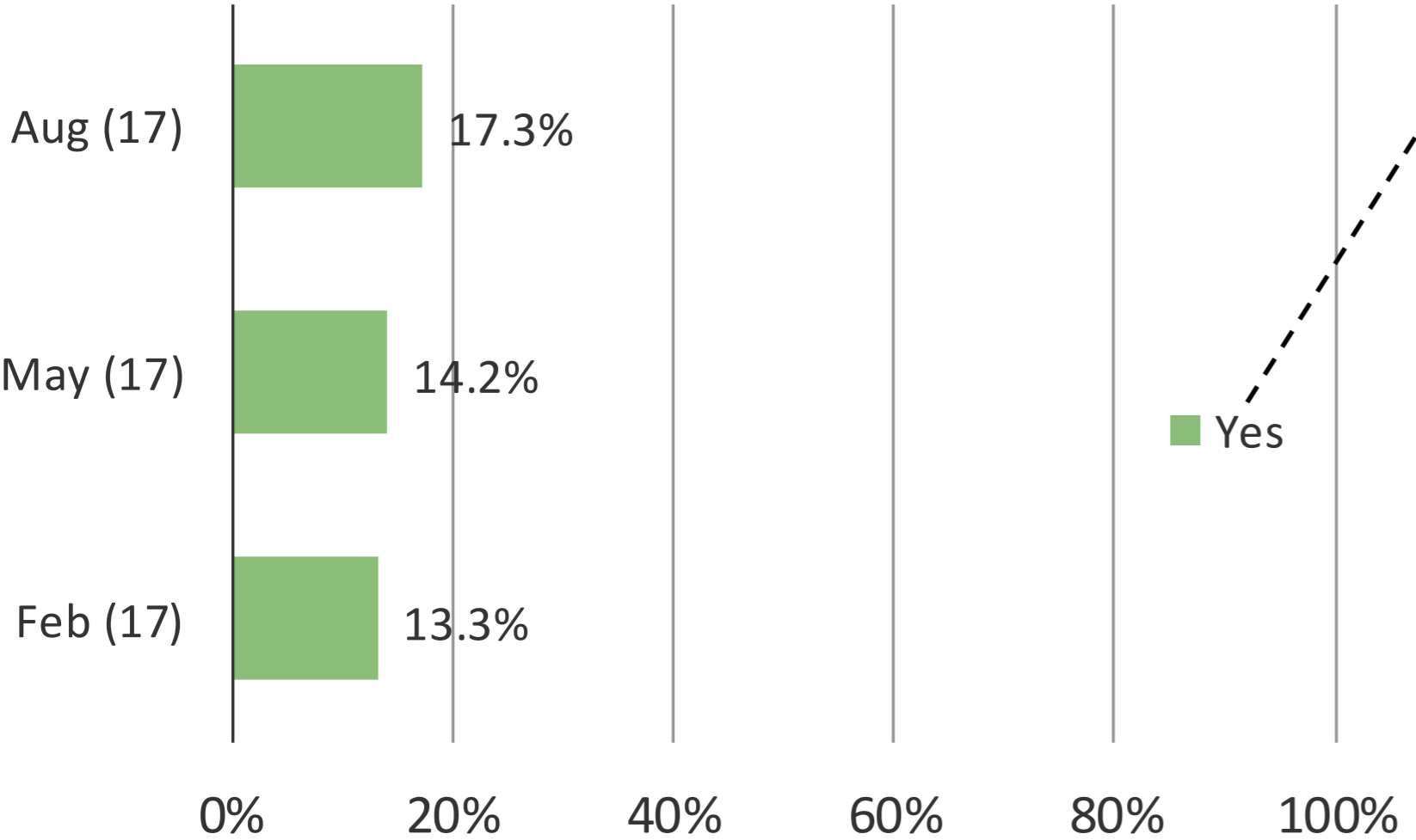
Hey Alexa or Okay Google

Sample: 1,500 US Consumers Balanced to Census.

17.3% of respondents say that they currently own a smart speaker. 82.1% of those who own a smart speaker own an Amazon Echo and 46.6% own a Google Home.

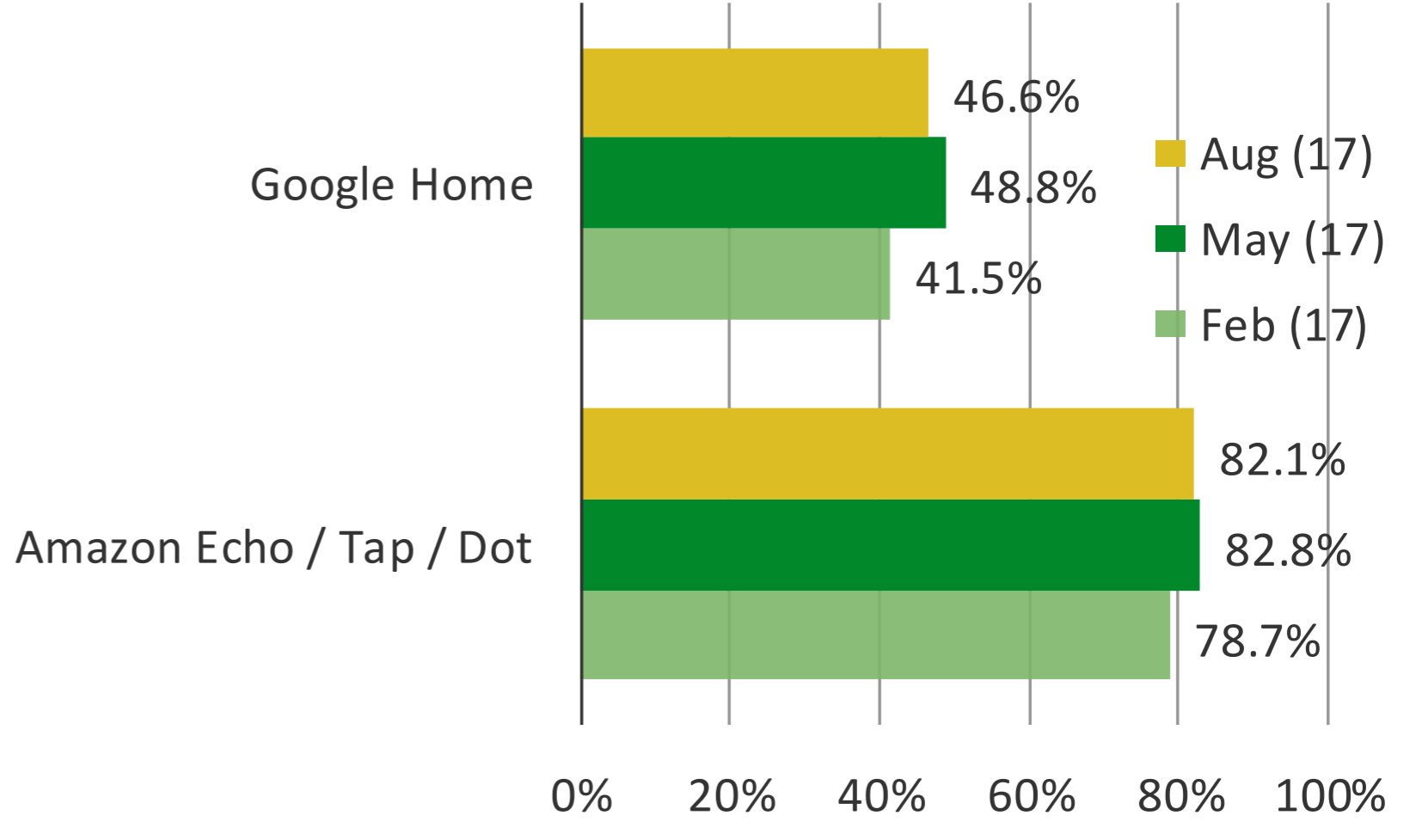
DO YOU CURRENTLY OWN A SMART SPEAKER?

This question was posed to all consumers.



DO YOU OWN EITHER OF THE FOLLOWING?

This question was posed to respondents who own a smart speaker.



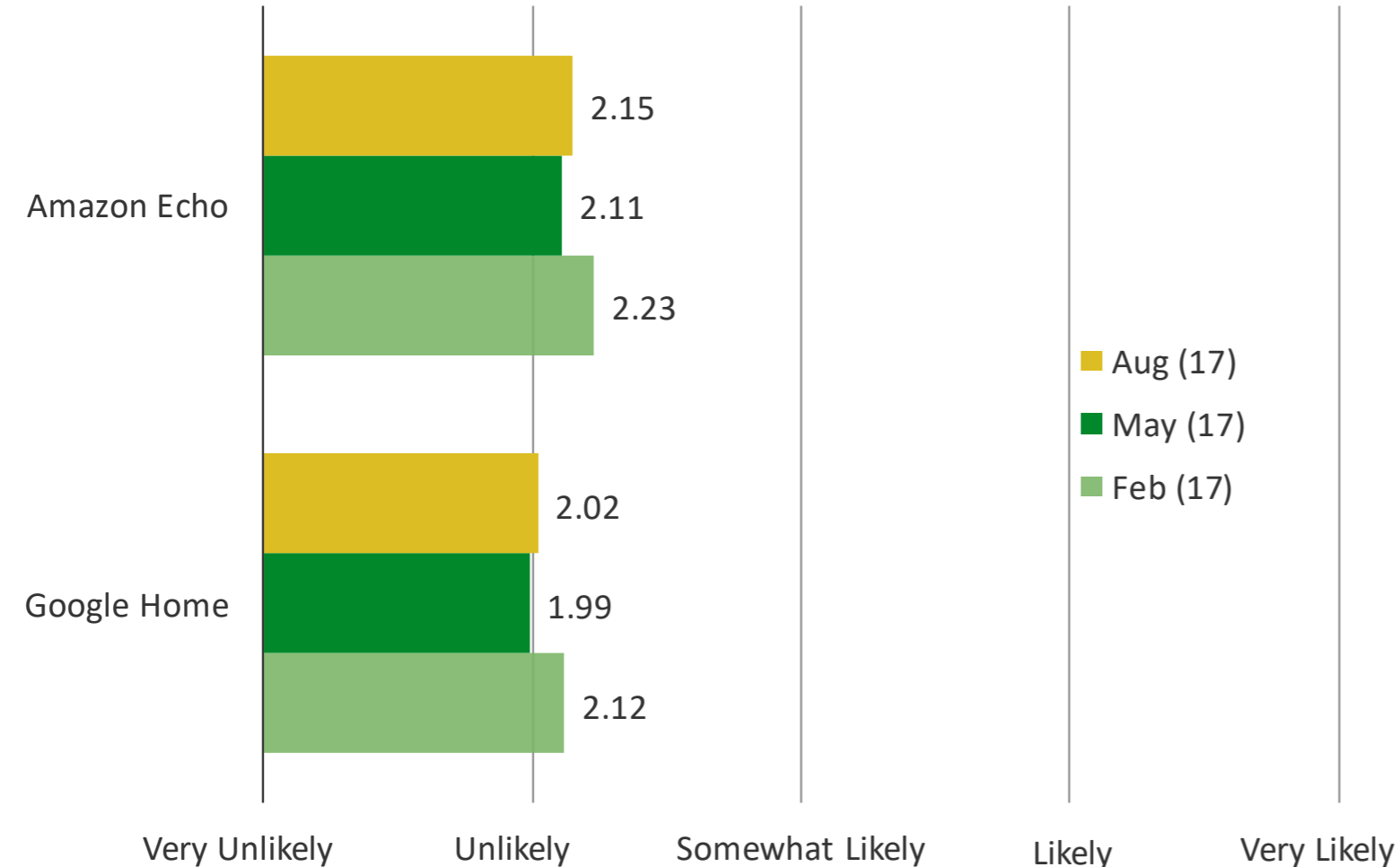
Hey Alexa or Okay Google

Sample: 1,500 US Consumers Balanced to Census.

Among those who do not currently own a smart speaker, respondents are more likely to purchase an Echo in the future than they are to get a Google Home. A plurality of these respondents would expect to spend \$100 on a speaker.

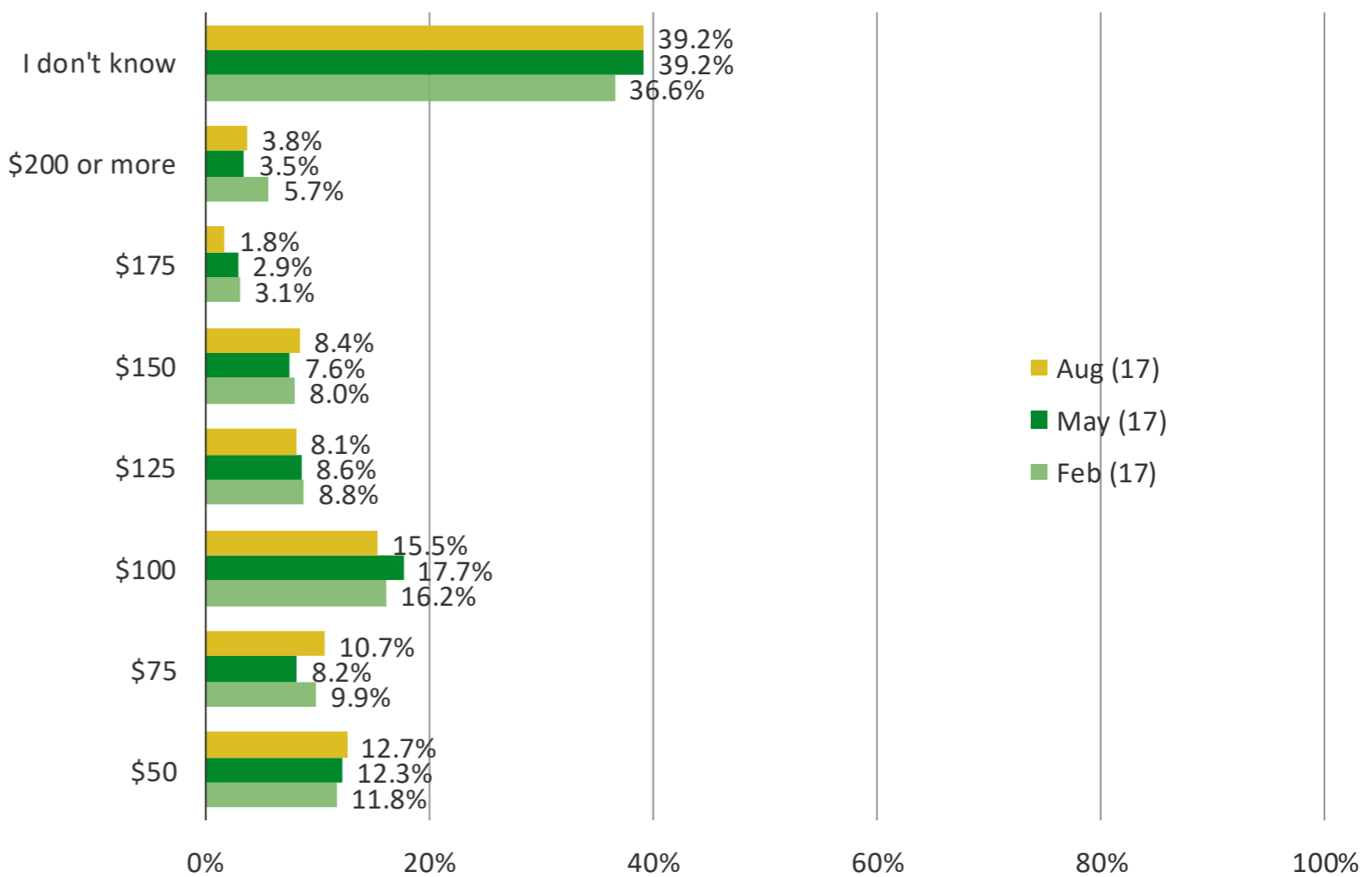
LIKELIHOOD OF BUYING THE FOLLOWING IN THE FUTURE?

This question was posed to respondents who don't own a smart speaker.



HOW MUCH WOULD YOU EXPECT TO SPEND ON A SMART SPEAKER?

This question was posed to respondents who don't own a smart speaker.



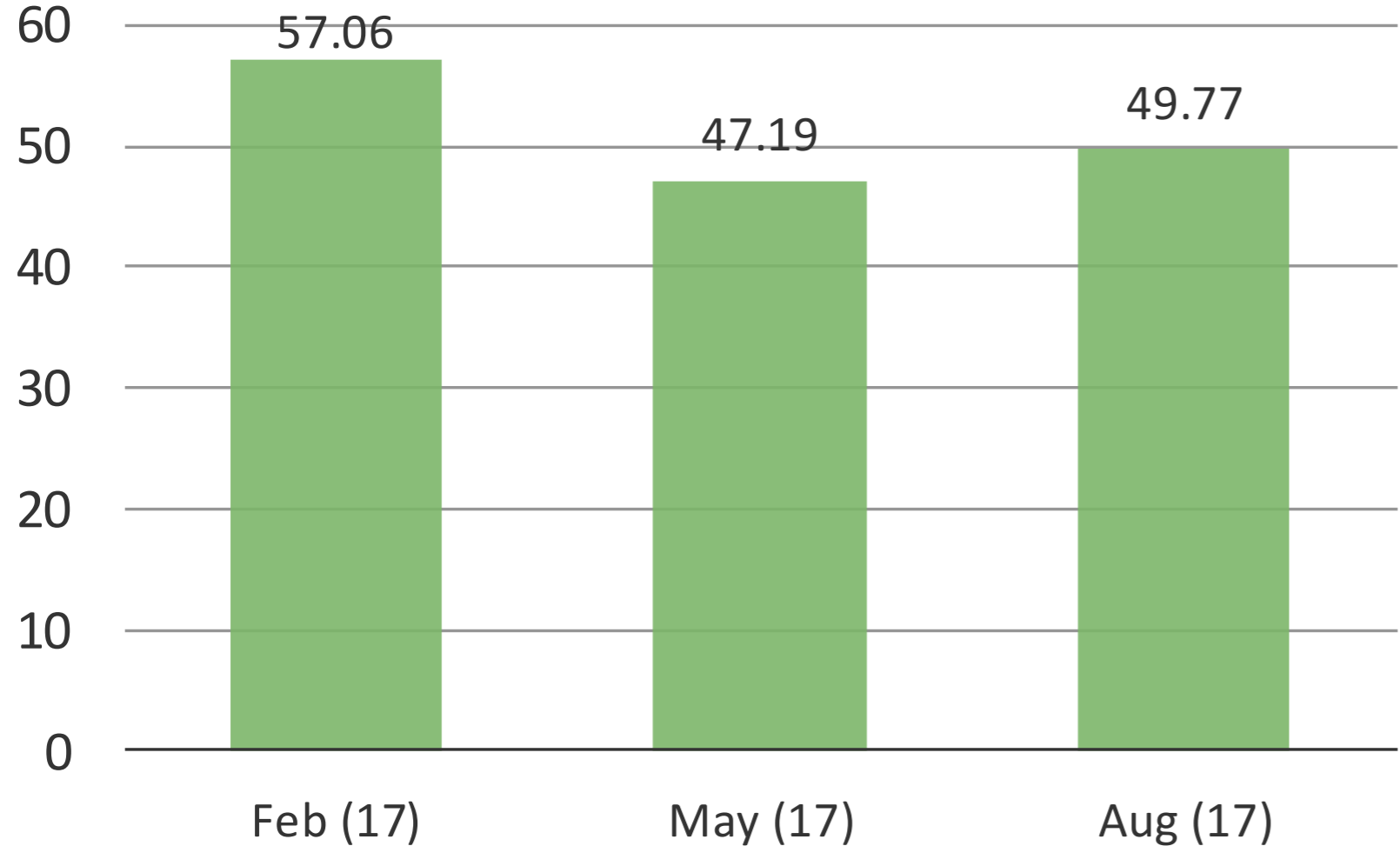
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Sample: 1,500 US Consumers Balanced to Census.

Among respondents who own each speaker, net promoter scores are very strong (nearly the same).

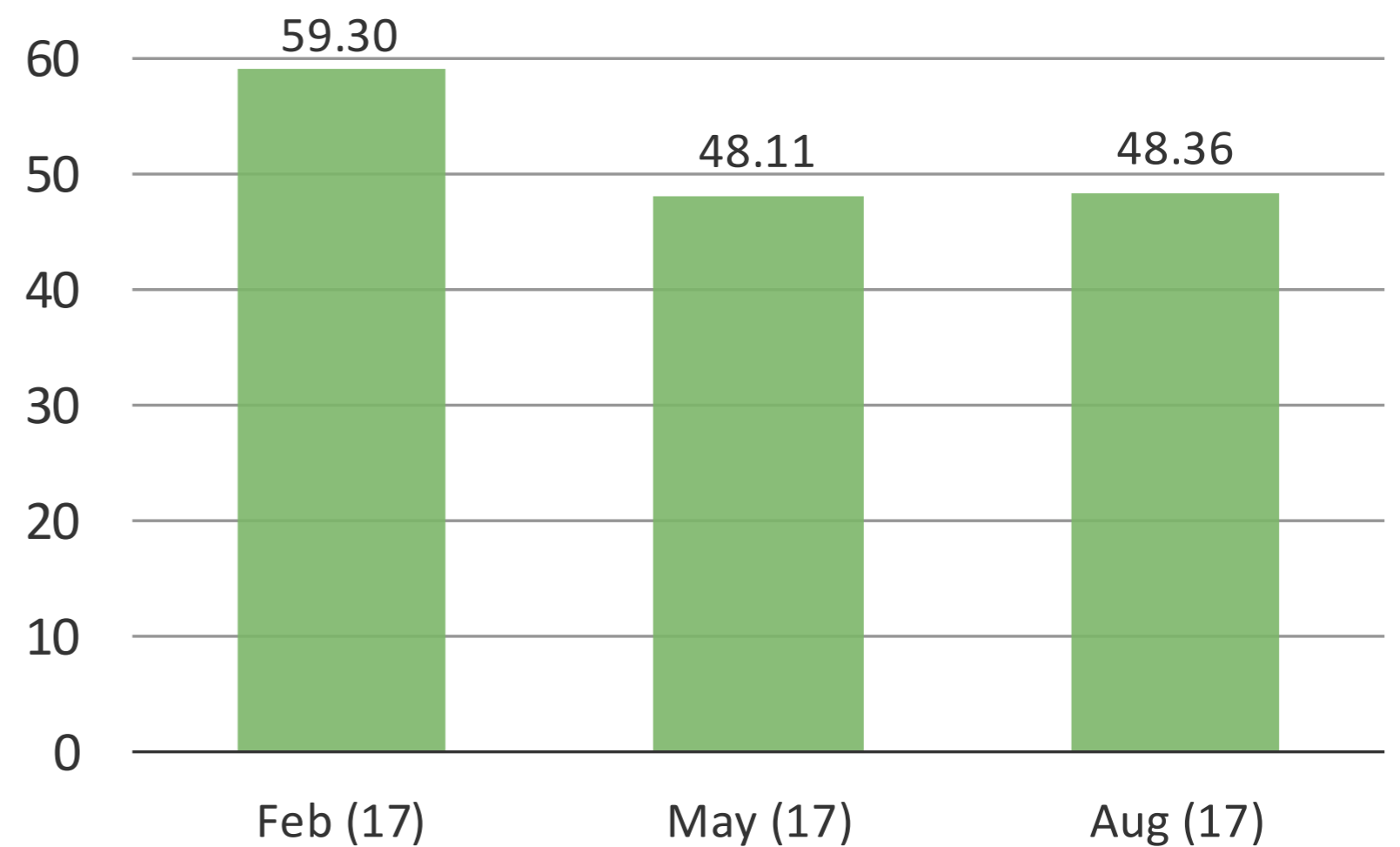
NET PROMOTER SCORE – AMAZON ECHO

This question was posed to Echo owners.



NET PROMOTER SCORE – GOOGLE HOME

This question was posed to Google Home owners.

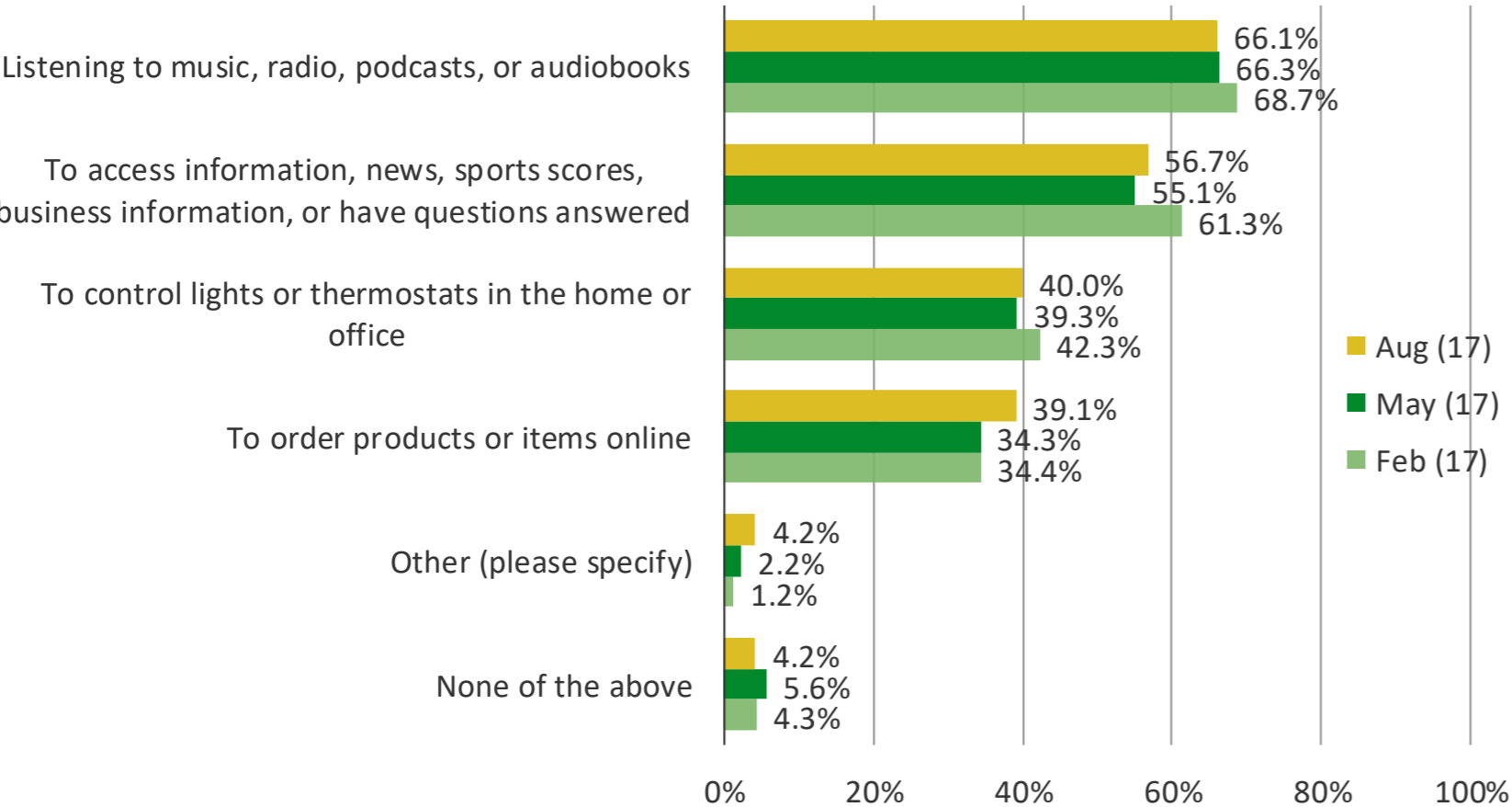


Sample: 1,500 US Consumers Balanced to Census.

Both the Amazon Echo and the Google Home have similar priorities for usage.

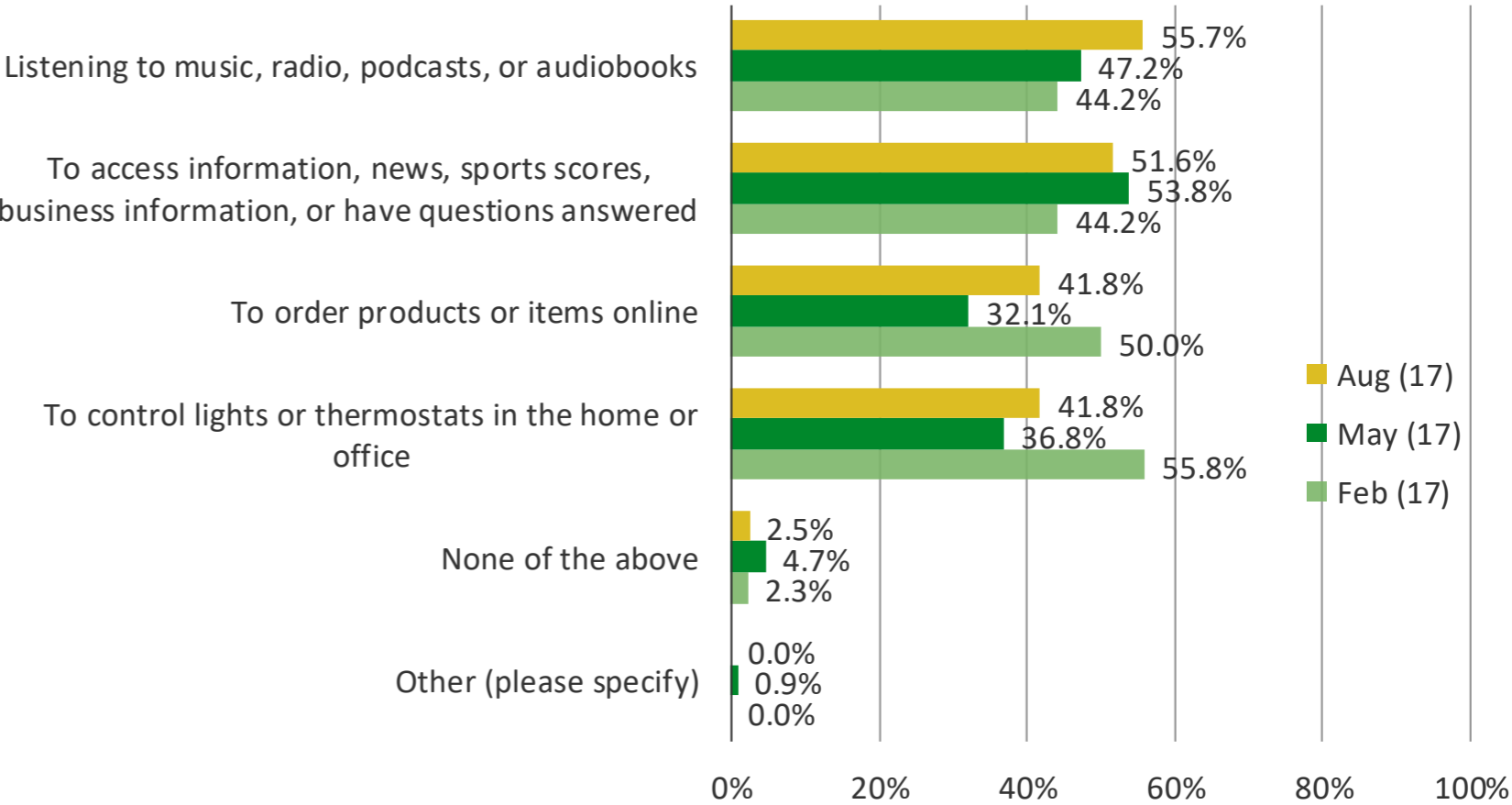
WHAT DO YOU USE YOUR AMAZON ECHO FOR?

This question was posed to Echo owners.



WHAT DO YOU USE YOUR GOOGLE HOME FOR?

This question was posed to Google Home owners.



Sample: 1,500 US Consumers Balanced to Census.

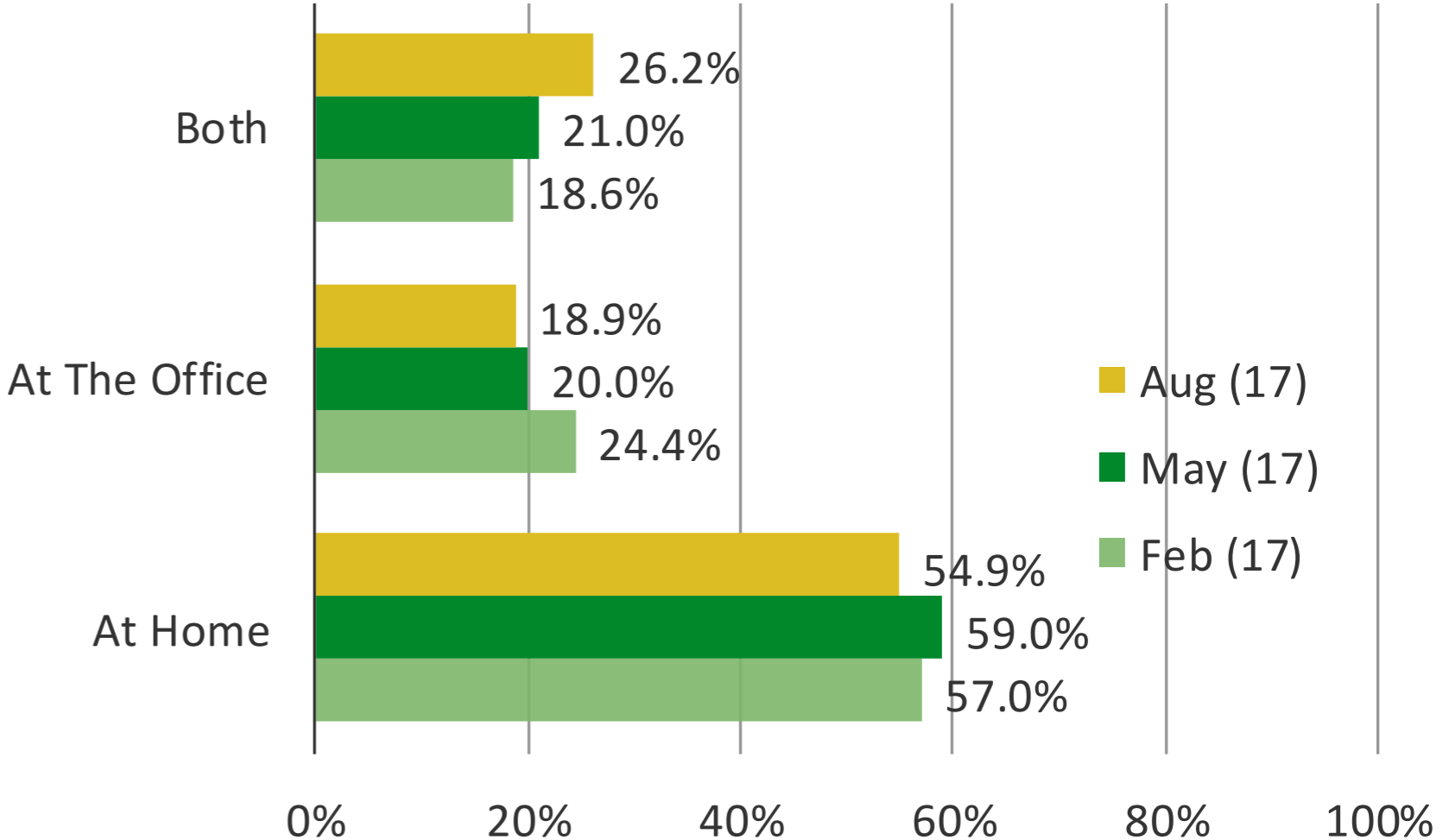
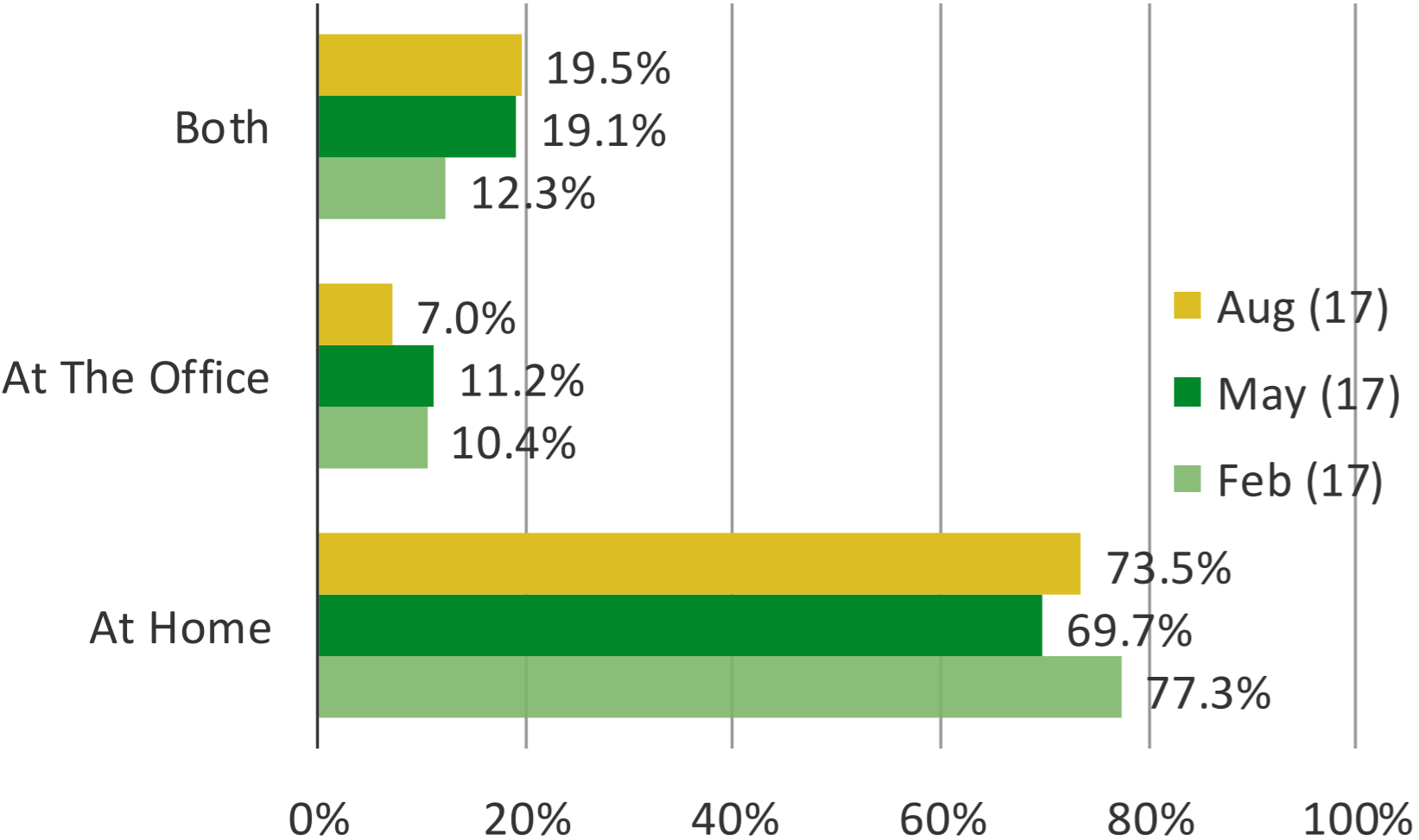
Amazon Echo skews more toward home use than the Google Home, which is more likely to be used in the office compared to the Amazon Echo.

DO YOU USE YOUR AMAZON ECHO AT HOME OR IN THE OFFICE?

DO YOU USE YOUR GOOGLE HOME AT HOME OR IN THE OFFICE?

This question was posed to Echo owners.

This question was posed to Google Home owners.

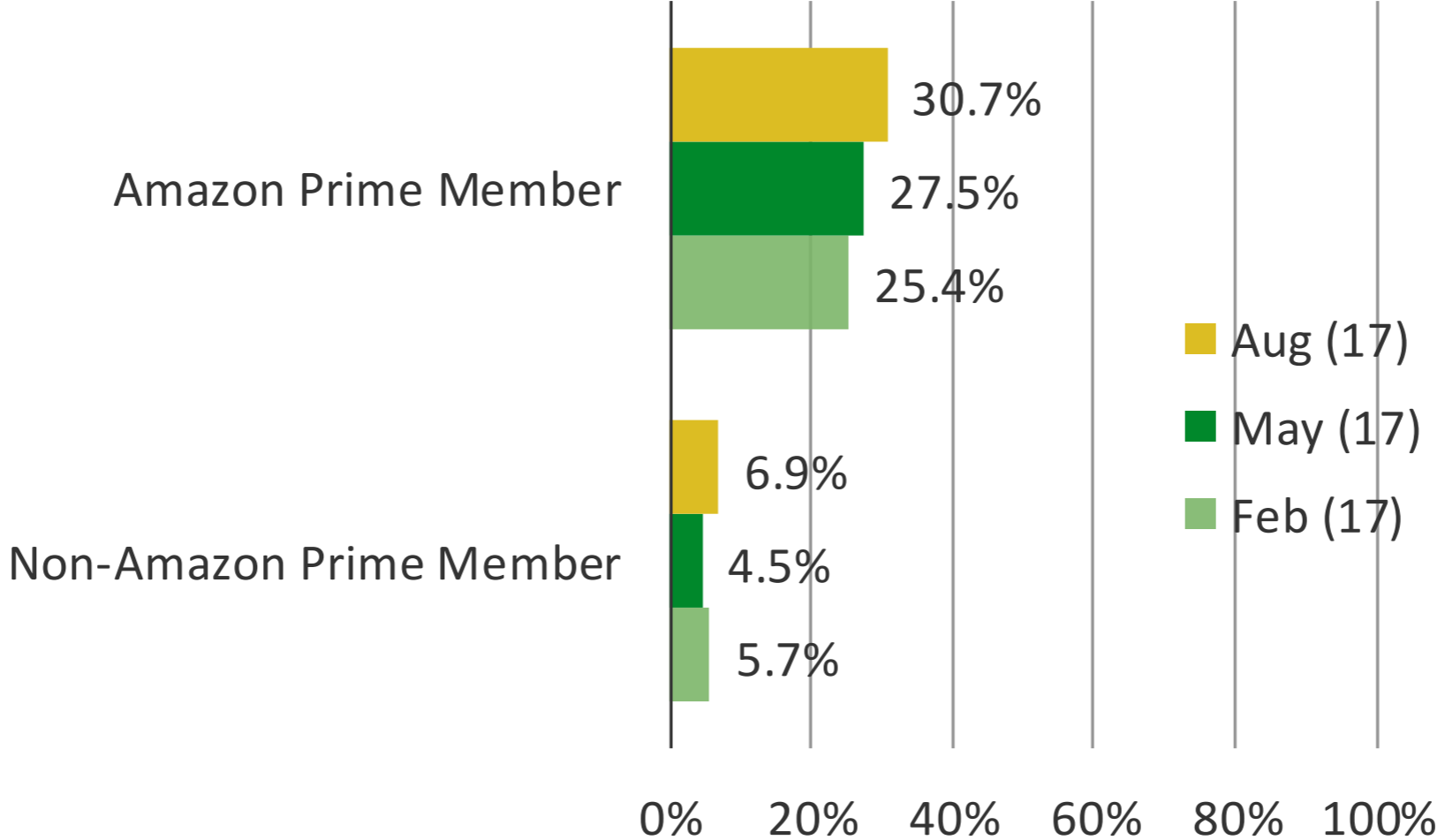


Hey Alexa or Okay Google

Sample: 1,500 US Consumers Balanced to Census.

Amazon Prime members are much more likely to own a smart speaker than respondents who do not have an Amazon Prime subscription.

AMAZON PRIME MEMBERS VS. NON AMAZON PRIME MEMBERS: DO YOU OWN A SMART SPEAKER?



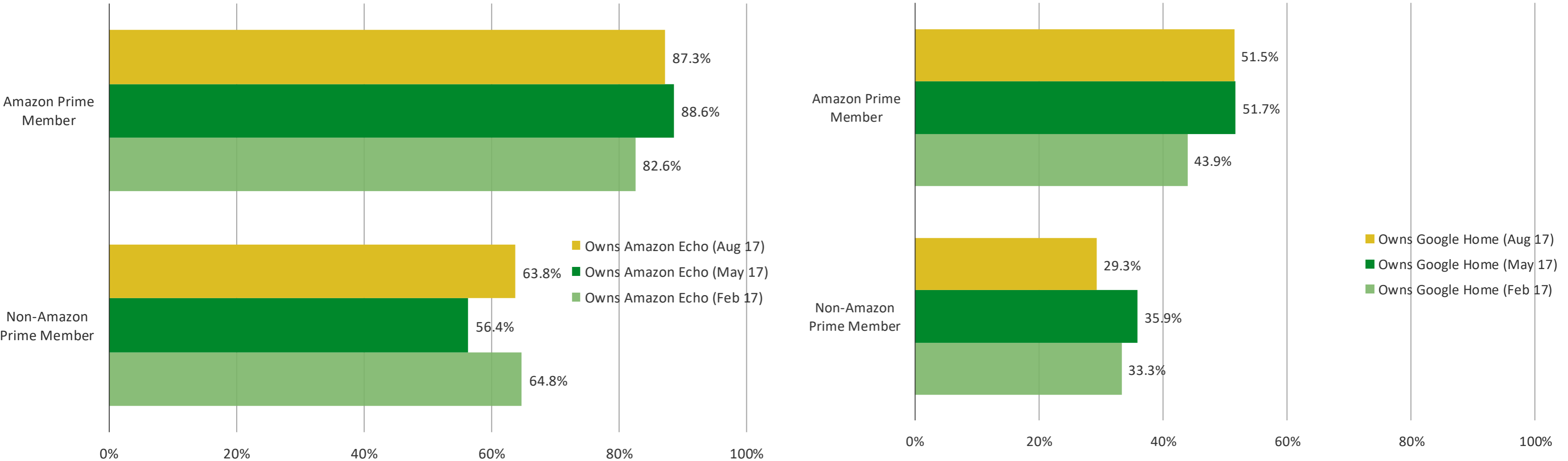
Hey Alexa or Okay Google

Sample: 1,500 US Consumers Balanced to Census.

Amazon Prime members are more likely to own an Echo than they are to own a Google Home. We would also note that non-Amazon Prime members are also more likely to own an Echo.

AMAZON PRIME MEMBERS VS. NON AMAZON PRIME MEMBERS: WHICH OF THE FOLLOWING DO YOU OWN?

This question was posed to respondents who own a smart speaker.



Hey Alexa or Okay Google

Sample: 1,500 US Consumers Balanced to Census.

Amazon Prime members who don't own a smart speaker are slightly more likely to buy the Echo in the future.

AMAZON PRIME MEMBERS: HOW LIKELY ARE YOU TO PURCHASE THE FOLLOWING IN THE FUTURE?

This question was posed to respondents who own a smart speaker.

