



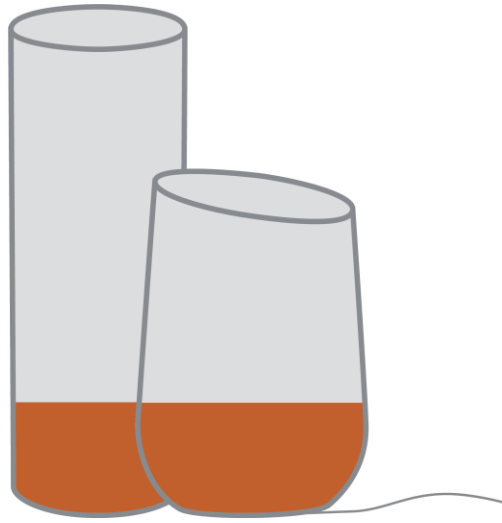
THE **smart**
audio REPORT



Methodology

- National online survey of adults age 18 and older
 - Conducted 2/28/2022 – 4/18/2022
 - 1190 smart speaker owners
 - 560 do not own smart speaker; use voice-operated assistants on at least one other device (Voice-users/no smart speaker)
 - 584 do not use voice-operated assistants at all (Non-voice users)
 - Tracking from previous online studies from Spring 2017, Spring 2018, Spring 2019 and Spring 2020
- In-depth interviews conducted via Zoom
 - Interviews with smart speaker owners, smartphone voice assistant users, and those who do not use any voice assistance
 - Follow up interviews with those who participated in ethnography interviews from The Smart Audio Report 2017

How it started



How it's going



What's new?

- **VOICE IS EVERYWHERE:** There has been incredible increase in the amount of voice tech available at the consumer level and incredible increase in voice assistant usage
- **USE IS INCREASING:** As people become more familiar with the technology, some increase usage and refine their habits to just the most useful skills
- **MESSAGES ARE HEARD:** Voice assistant users are receptive to ad messaging

How it started



How it's going



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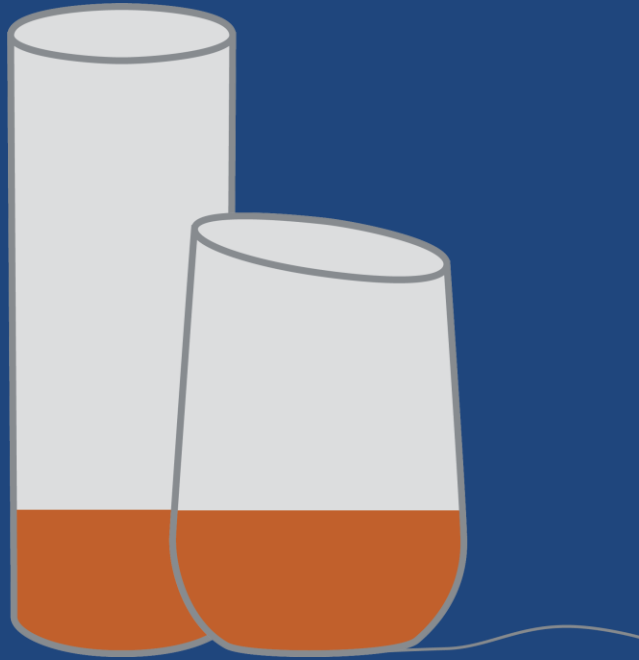
How it started



How it's going



Voice is Everywhere



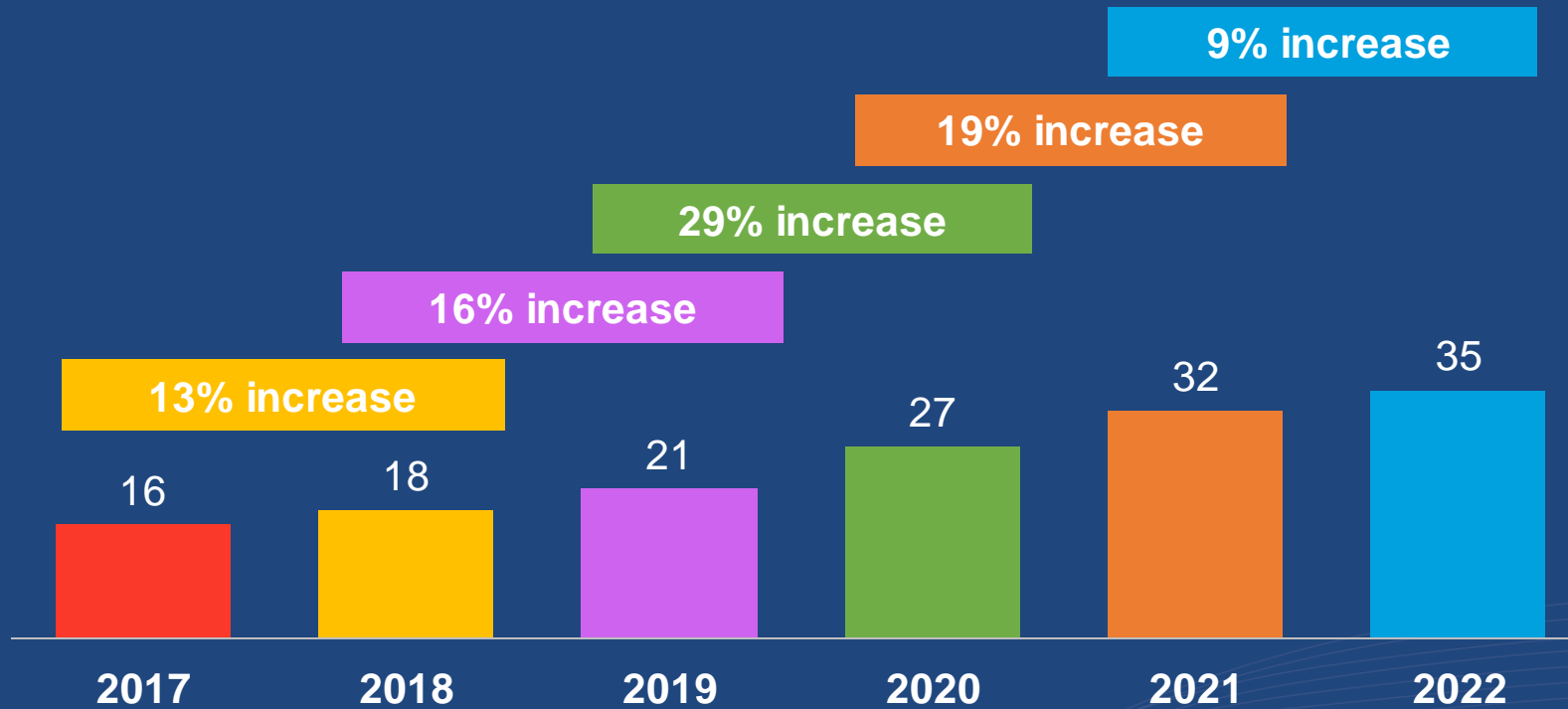
35% of Americans 18+
own a smart speaker,
or around 100 million people

In 2021, 32% of U.S. adults 18+ owned a
smart speaker, or around 82 million people

Source: The Infinite Dial

Google Home Google Home is a trademark of Google Inc.

% of Americans 18+ who own a smart speaker:



Percentage of those in the U.S. age 18+ who own a smart speaker

Source: The Infinite Dial

How it started

Top three reason for getting a smart speaker in 2017

- 1) Listen to music
- 2) Ask questions without needing to type
- 3) Seems like a fun new gadget

Base: Smart Speaker owners

How it's going

Top three reason for getting a smart speaker in 2022

- 1) Listen to music
- 2) Ask questions without needing to type
- 3) Seems like a fun new gadget

Base: Owned smart speaker for less than one year

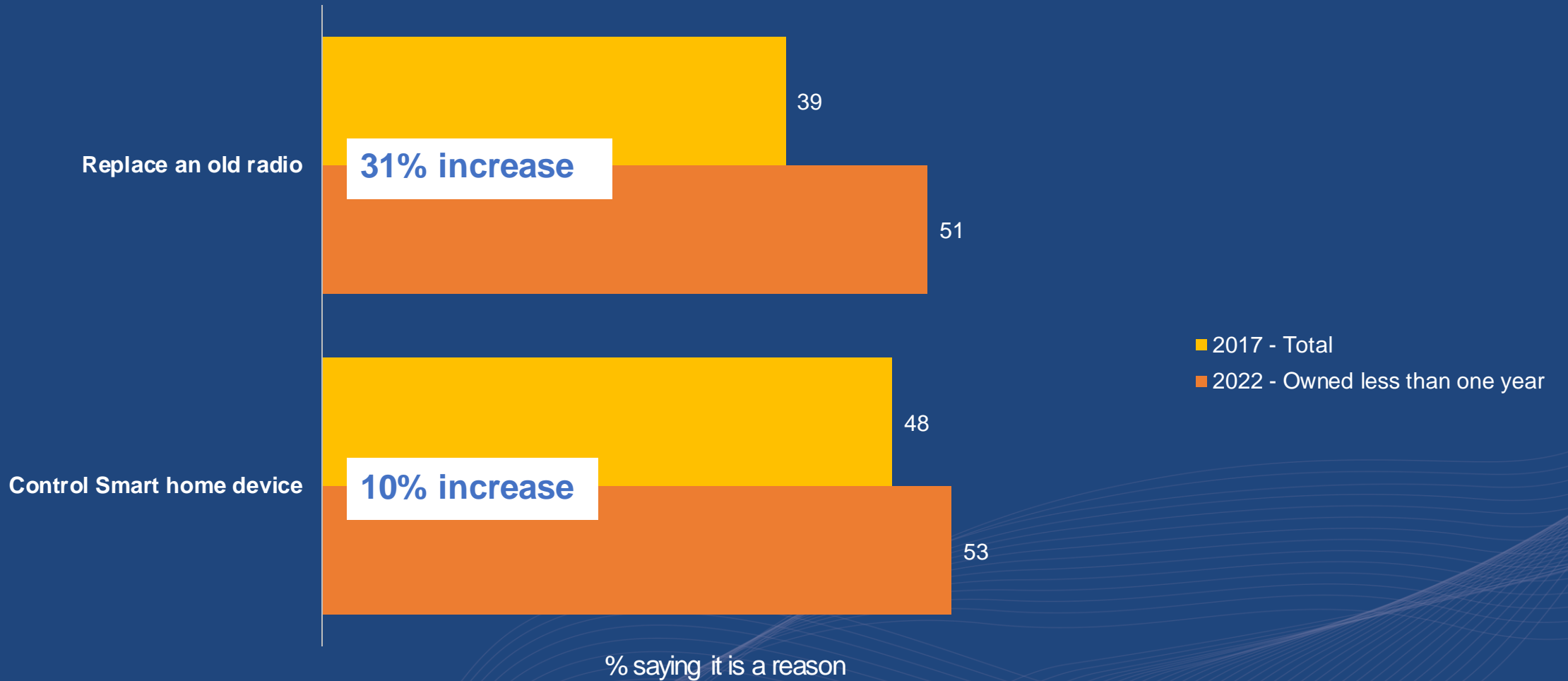
Reasons for getting a smart speaker that have increased since 2017:

Technology upgrades

Access to media

Accessibility

Reasons for wanting a smart speaker: **Technology**



Base: Smart Speaker owners

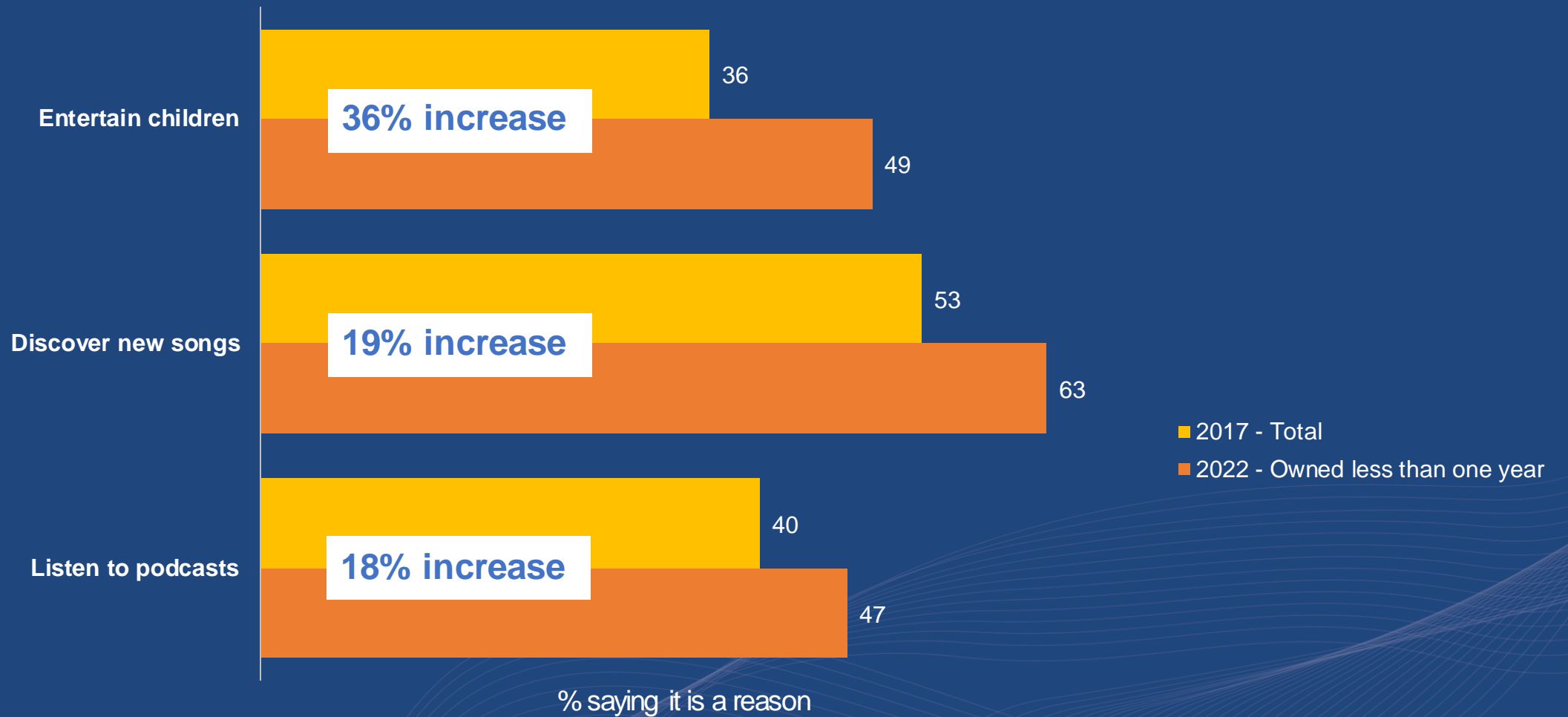
Smart speaker owners
Agree/Disagree: “Smart speakers allow for a
more convenient living experience”

86% agree

Spring 2022

Base: Own a smart speaker

Reasons for wanting a smart speaker: **Media Access**



Base: Smart Speaker owners

Smart speaker owners

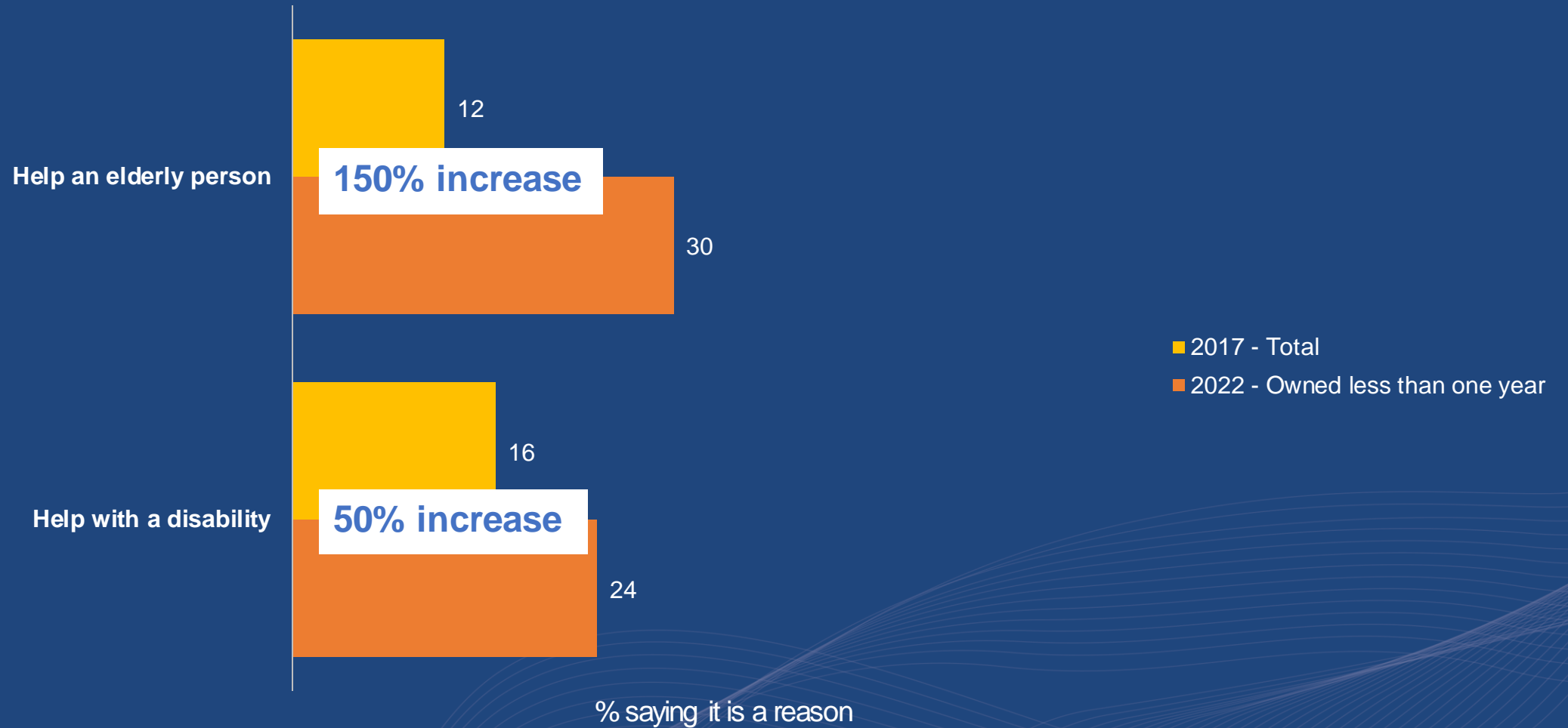
Agree/Disagree: “Smart speakers make it easy to discover new content or events”

80% agree

Spring 2022

Base: Own a smart speaker

Reasons for wanting a smart speaker: **Accessibility**



Base: Smart Speaker owners

Smart speaker owners

Agree/Disagree: “Smart speakers interactions are short and easy, with low level of effort”

90% agree

Spring 2022

Base: Own a smart speaker

User feedback about accessibility:

“There are some things it can't do. Voice recognition if you have a speech problem it can't individually interpret what you're saying. It can't be a fit for that one person. **It's uniform for everyone so it doesn't pick up on little nuances.**”

– Herb, 50

“Microsoft and Apple have accessibility features where you can use your voice to command anything like writing things, like using a mouse through voice. But that's not a mainstream feature, that's an accessibility feature that if you know how to turn it on how to set up the settings you can actually use voice. I'm not sure why they separate it. **I feel like the accessibility features could be integrated into the full series** all-access type thing because they are really powerful.”

– Derrick, 36

“I found with my little son when he's used it he may say something and [voice assistant] says in a different way and that gets him upset or frustrated, so **I could see how that technology could be a point of frustration for the young or for the elderly or those that are having trouble communicating.**”

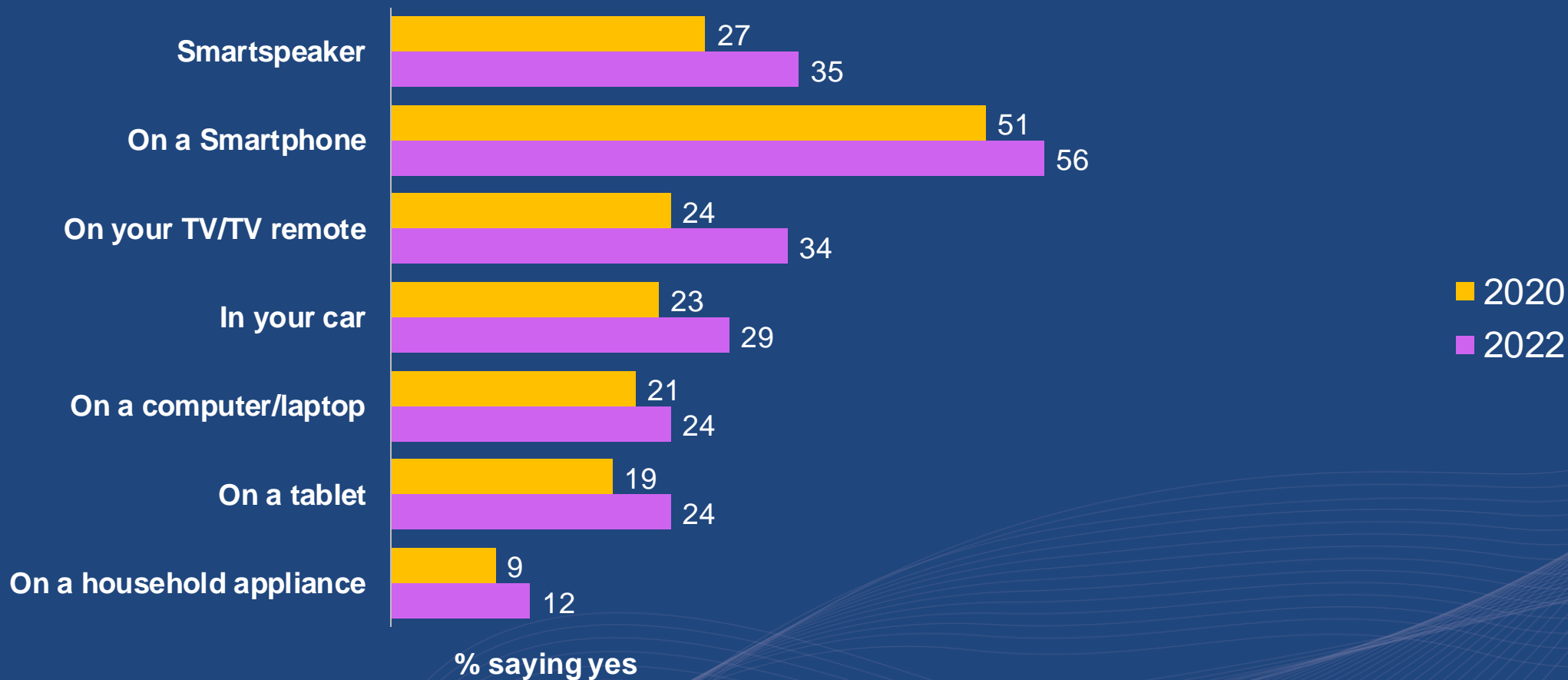
– Lauren, 42

62% of Americans 18+ use
a voice assistant on any device

Source: The Infinite Dial

Total U.S. Online population 18+

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



Spring 2022

Base: Total U.S. Online population 18+

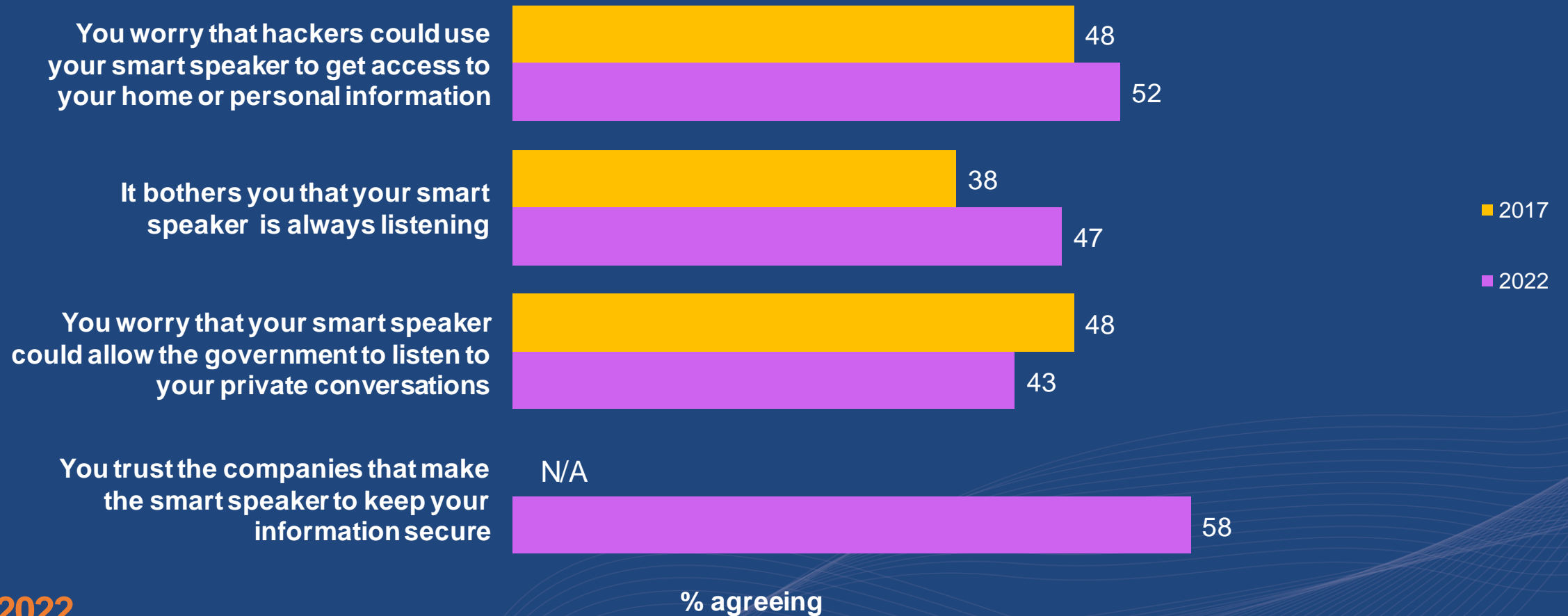
How it started

Debates about
smart speakers
“always listening”

How it's going

Debates about
smart speakers
“always listening”

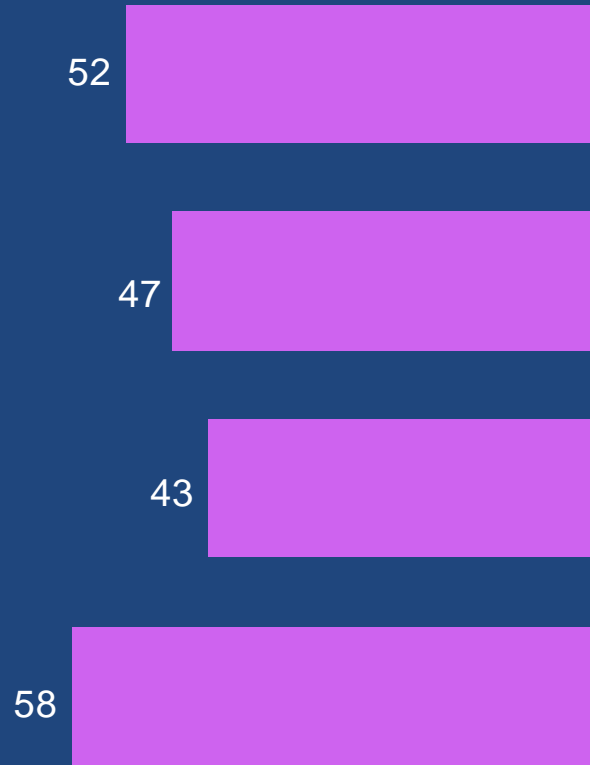
Agree/Disagree: Smart speaker owners



Spring 2022

Base: Own a smart speaker

Smart speaker owners
% of smart speaker owners who agree



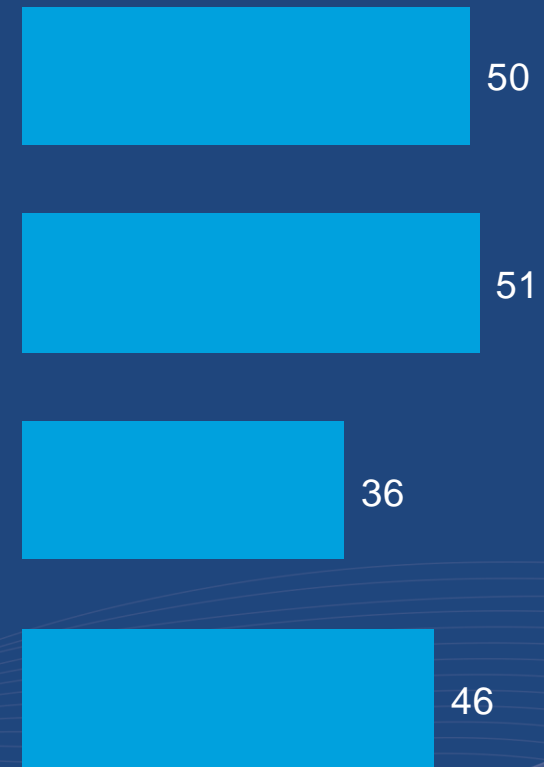
Do not own smart speaker
% who say it is a reason they do not own a smart speaker

You worry that hackers could use your smart speaker to get access to your home or personal information

It bothers you that your smart speaker is always listening

You worry that your smart speaker could allow the government to listen to your private conversations

You trust the companies that make the smart speaker to keep your information secure

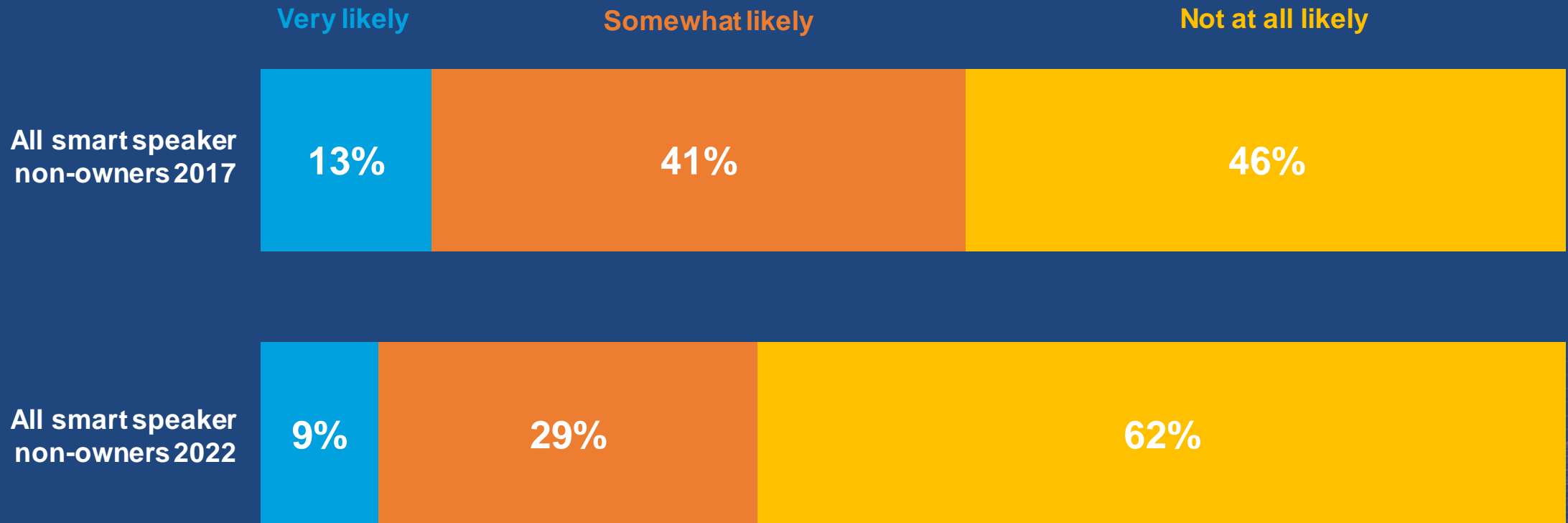


Spring 2022

Base: Own a smart speaker

Smart speaker non-owners

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



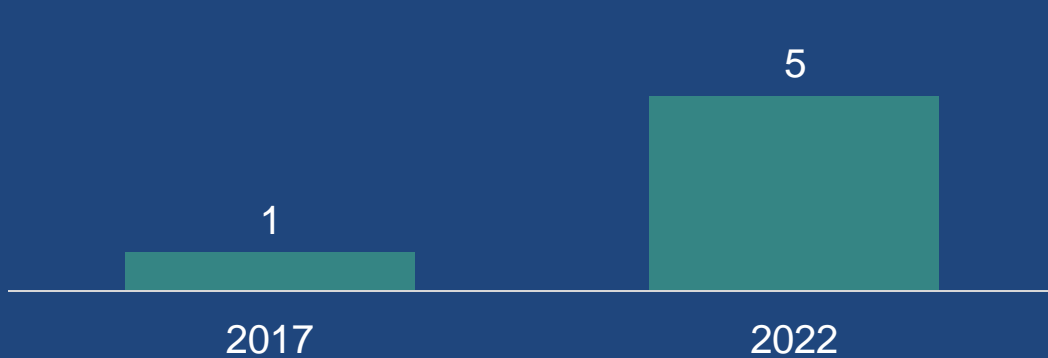
Base: Do not own a smart speaker

Voice Assistant is Increasing

Share of Time Spent Listening to Audio through a Smart Speaker

Base: U.S. Population 13+

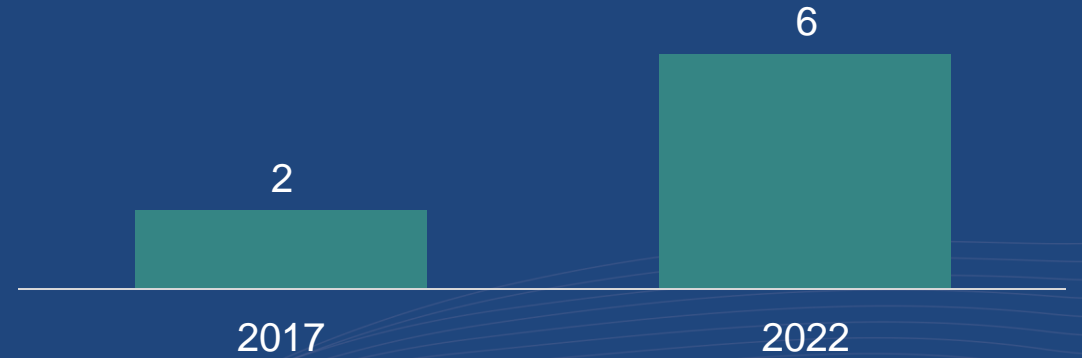
400% increase



Share of Time Spent Listening to Podcasts through a Smart Speaker

Base: Podcast listeners

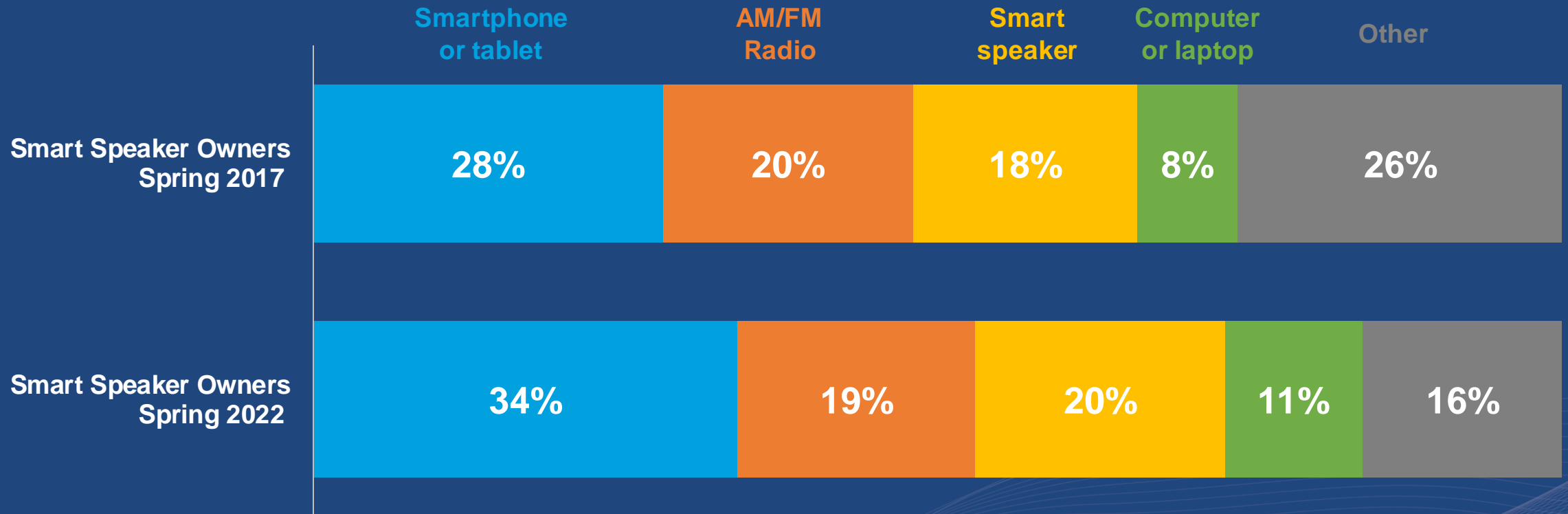
200% increase



Spring 2022

Source: Edison Research Share of Ear Q1 2022

How do you listen to audio most often?

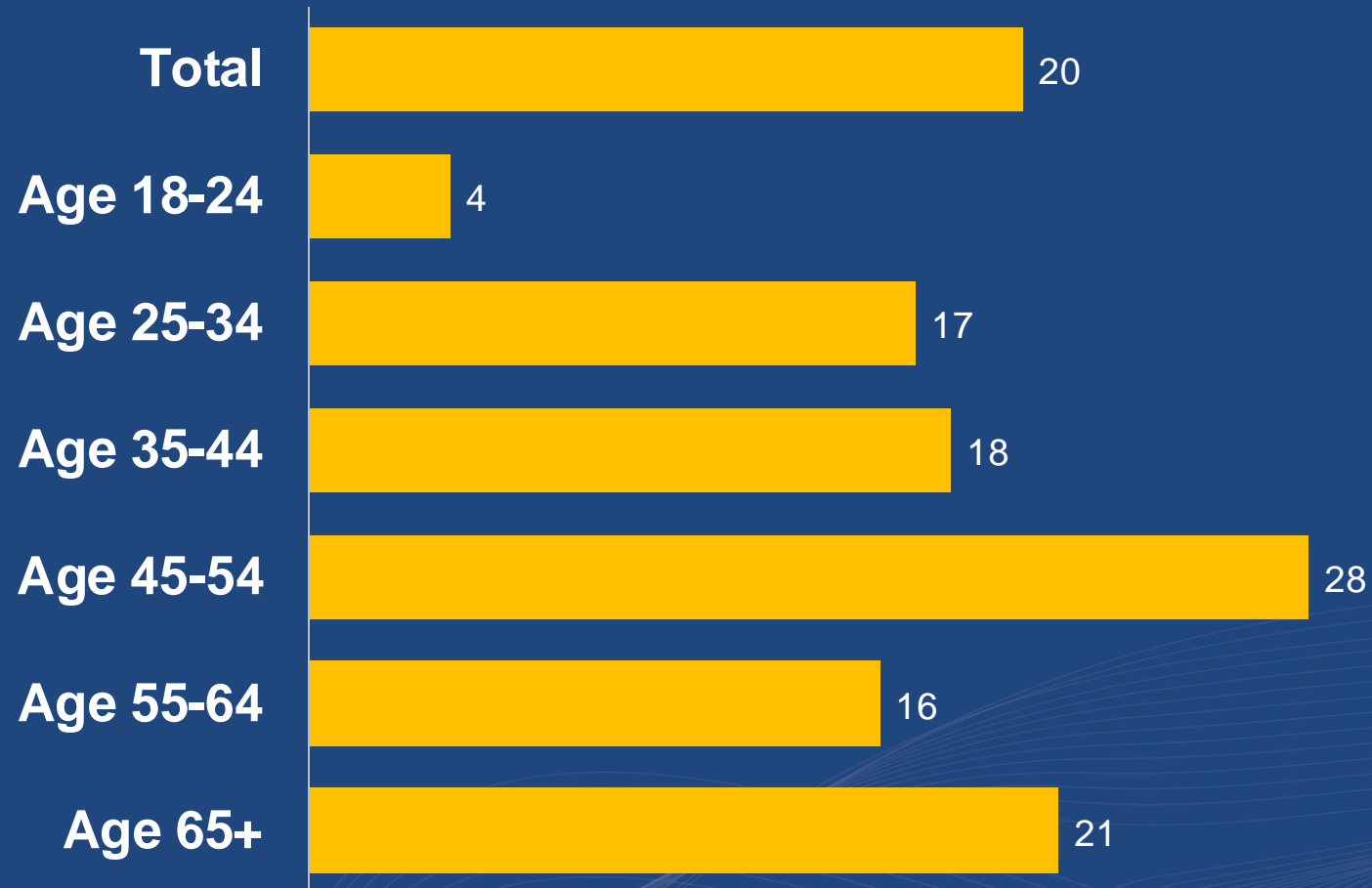


Spring 2022

Base: Own a smart speaker

Smart speaker owners

% who listen to audio on smart speaker most often:

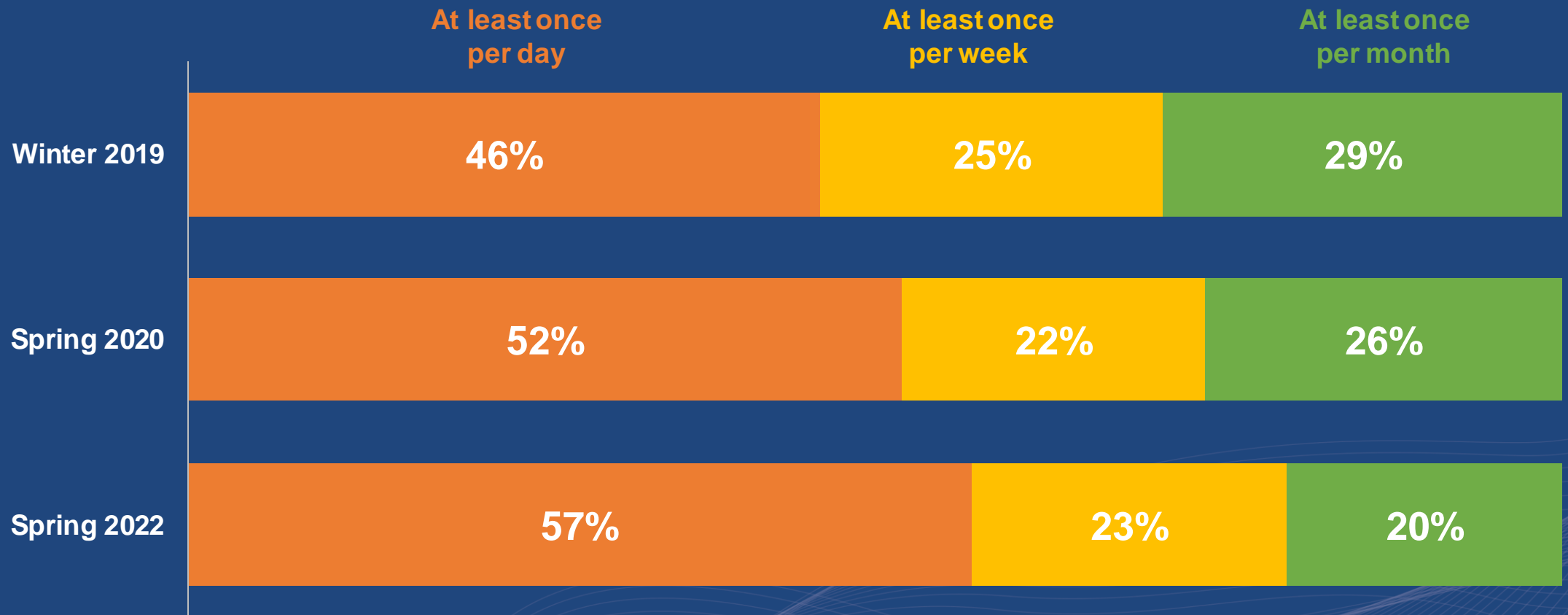


Spring 2022

Base: Own a smart speaker

Voice-operated assistant users

How often do you use voice commands?



Spring 2022

Base: Ever use voice-operated personal assistants

Average number of different types of tasks requested on a **smart speaker** in a typical week:

2017:

7.5

2022:

12.4

Spring 2022

Base: Own a smart speaker



Average number of different types
of tasks requested on a **smartphone
voice assistant** in a typical week:

2020: 8.8

2022: 10.7

Spring 2022

Base: Own a smart speaker

Questions

Add an item to shopping list

Control household devices Tell a joke/something funny

Look up recipes/cooking requests Find restaurants/businesses

Play a podcast Set a timer/alarm

Read short stories

Play an audiobook

Order an item

Connect with smart speakers outside home

Check/add to calendar

Play music

Get the news

Make a phone call

Add to to-do list

Check the time

Play NPR

Order food

Sports score/update

Play a game

Listen to an AM/FM radio station

Connect with smart speakers inside home

Weather

Get the traffic

Spring 2022

Base: Own a smart speaker

The number of speaker owners who listen to a podcast on their smart speaker in a typical week increased by 22% over the past 5 years (from 32% in 2017 to 39% in 2022)

Spring 2022

Base: Own a smart speaker

Smart speaker owners

% who ever listen to news on their smart speaker

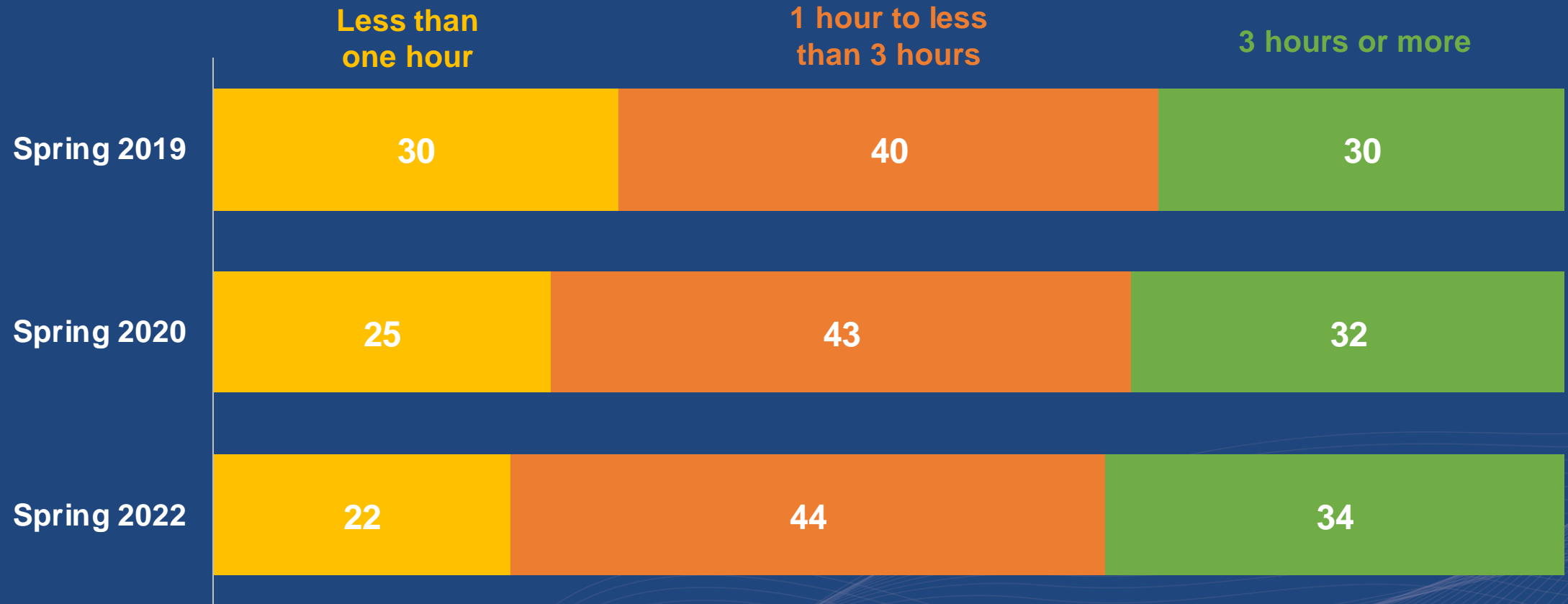


Spring 2022

Base: Own a smart speaker

Smart speaker owners

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

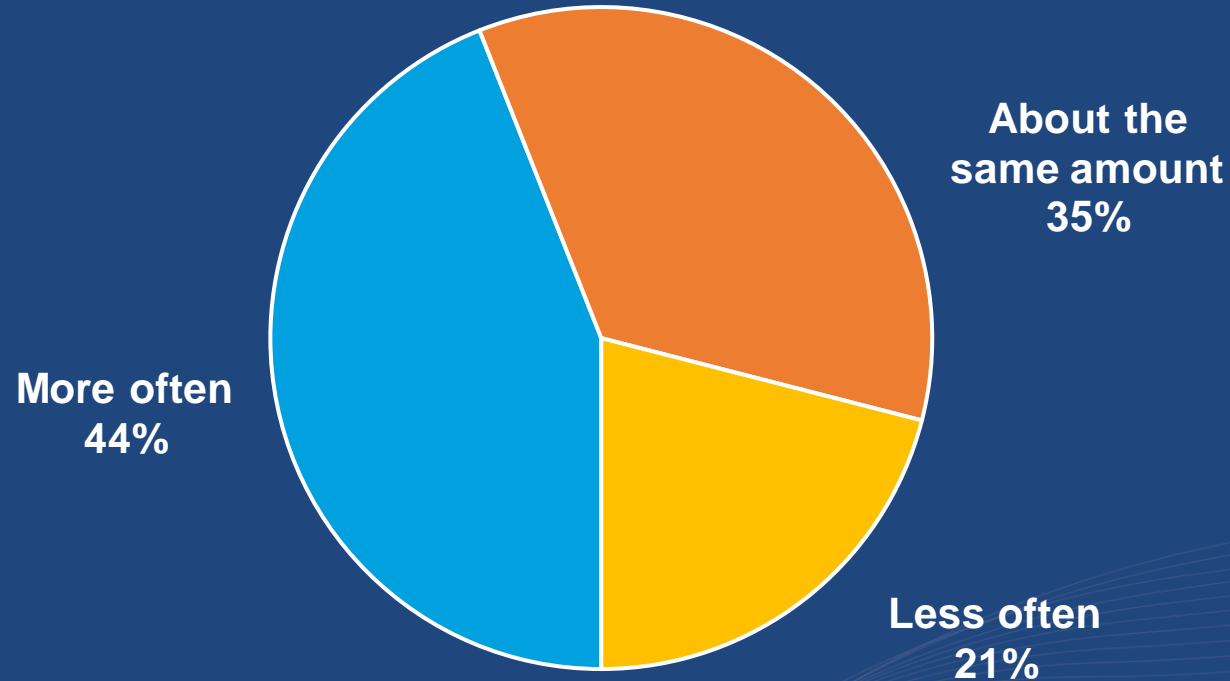


Spring 2022

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

Smart speaker owners

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



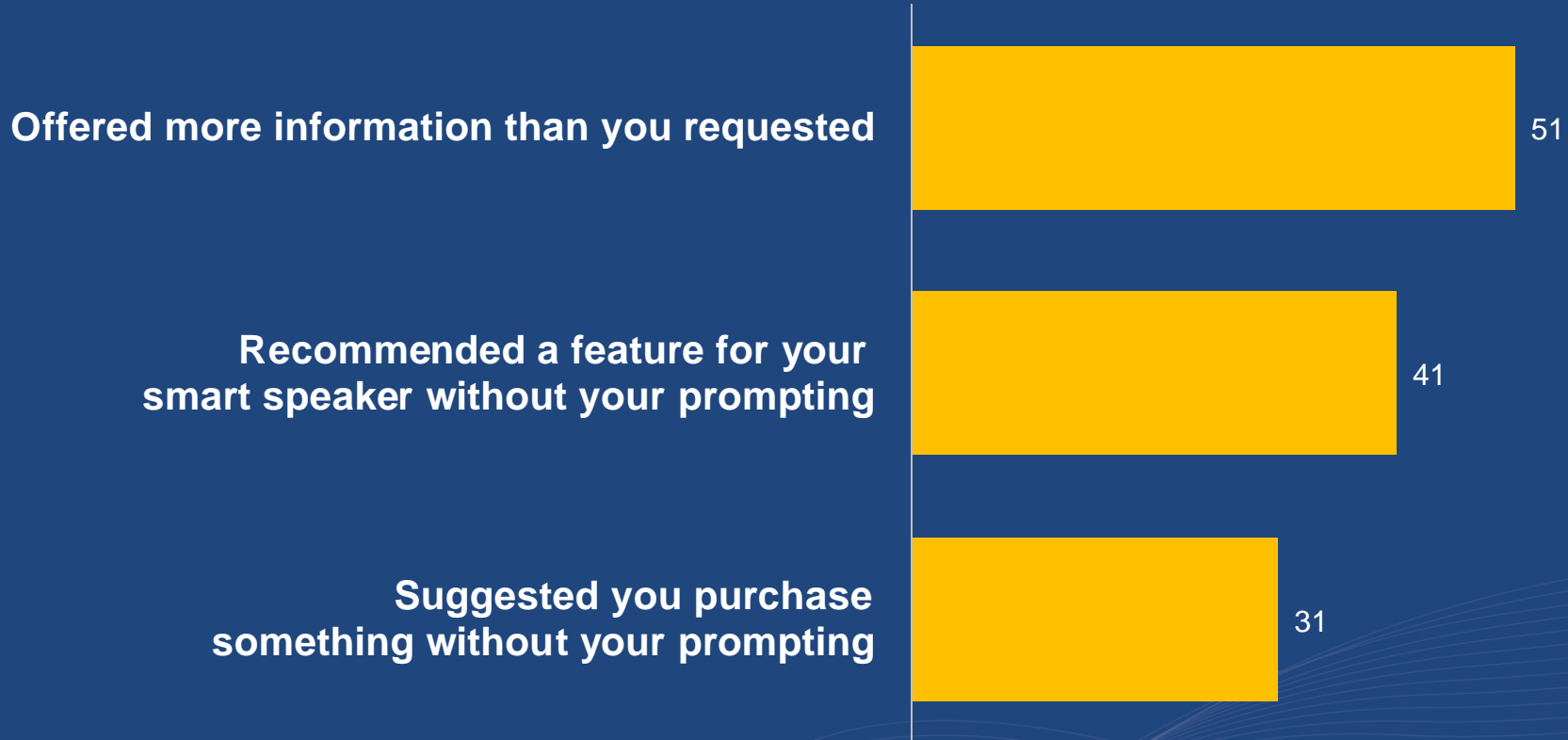
Spring 2022

Base: Own a smart speaker

Messages are Heard

Smart speaker owners

Has your smart speaker ever...?



Spring 2022

Base: Smart speaker owners

Smart speaker owners

How much does it bother you when your smart speaker...?

Bothers you a lot

Bothers you a little

Doesn't bother you at all

Offered more information than you requested

18%

42%

40%

Recommends a feature for your smart speaker without your prompting

24%

37%

39%

Suggests you purchase something without your prompting

33%

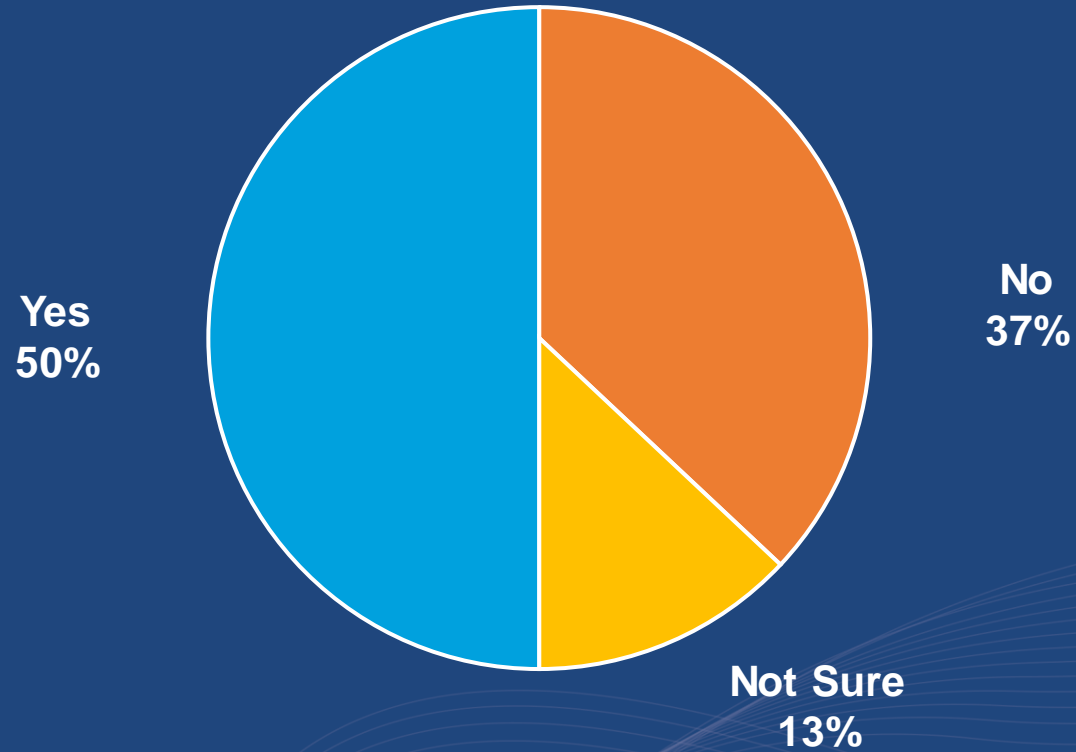
40%

27%

Base: Smart speaker has ever done item described

Smart speaker owners

Have you ever heard an advertisement on your smart speaker?



Spring 2022

Base: Own a smart speaker

Smart speaker owners

“You are likely to respond to ads on smart speakers”

41%

Of smart speaker owners agree

53%

Of smart speaker owners who have heard an ad on device agree

Spring 2022

Base: Smart Speaker Owners

Smart speaker owners

Compared to ads you hear in other places, would hearing an ad on a smart speaker make you....?

More likely to consider a brand

No difference

Less likely to consider a brand

Total

33%

55%

12%

Smart speaker owners who heard an ad on a smart speaker

48%

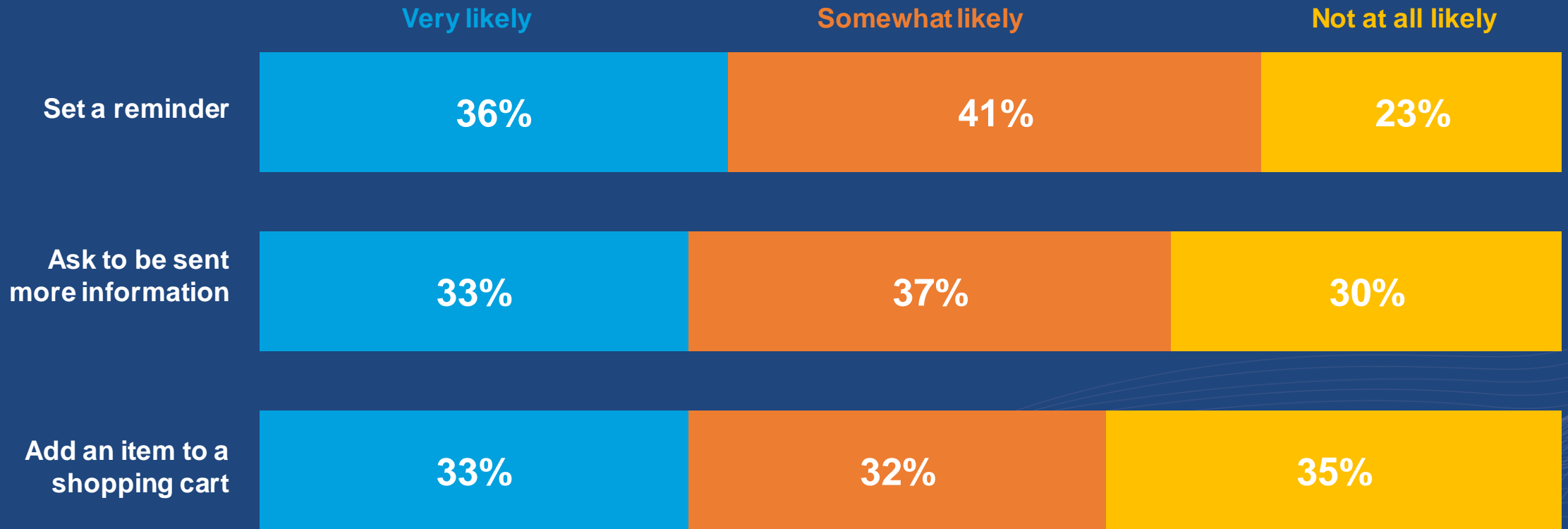
47%

6%

Base: Own a smart speaker

Smart speaker owners

If given the opportunity to interact with an ad on smart speakers using your voice, how likely would you be to...?



Base: Own a smart speaker

Smart speaker owners

Agree/Disagree: “Brands that advertise on smart speakers are innovative”

66%

of smart speaker owners agree

80%

of smart speaker owners who have heard an ad on device agree

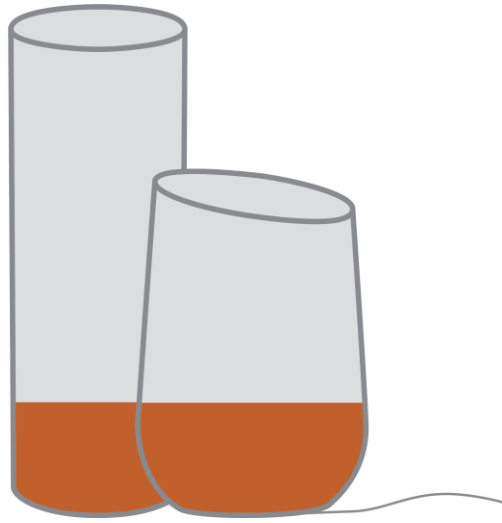
Spring 2022

Base: Own a smart speaker

Takeaways

- **VOICE IS EVERYWHERE:** There has been incredible increase in the amount of voice tech available at the consumer level and incredible increase in voice assistant usage
- **USE IS INCREASING:** As people become more familiar with the technology, some increase usage and refine their habits to just the most useful skills
- **MESSAGES ARE HEARD:** Voice assistant users are receptive to messaging

How it started



How it's going





THE **smart**
audio REPORT

npr.org/smartaudio

