![YouGov - What the world thinks]

YouGov - Smart Speakers

Sample: 1,000 UK adults who own smart speakers

Fieldwork: 11th - 15th April 2019

	Total	Gender		Age					Social Grade		Region								
		Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
speaker_models12. Which, if any, of the following brands of smart voice-controlled speakers do you personally use in your home? (Please select all that apply)																			
Base: UK adults	1000	509	491	18	119	167	210	486	729	271	207	182	96	74	271	830	40	110	20
Amazon Echo	80%	81%	80%	72%	68%	78%	83%	83%	80%	81%	76%	81%	75%	82%	83%	80%	88%	82%	80%
Google Home	21%	21%	21%	33%	30%	27%	20%	16%	20%	22%	24%	24%	25%	20%	17%	22%	13%	19%	15%
Apple HomePod	2%	2%	2%	-	3%	4%	2%	1%	2%	1%	0%	2%	3%	4%	2%	2%	3%	3%	-
Sonos One	5%	5%	4%	-	5%	5%	7%	4%	5%	3%	6%	3%	1%	8%	7%	5%	5%	2%	5%
Other	1%	1%	1%	-	1%	-	0%	2%	1%	1%	1%	2%	1%	1%	-	1%	-	1%	10%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Not applicable - I do not personally use a smart voice-controlled speaker in my home	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
speaker_models12_single. Which ONE, if any, of the following brands of smart voice-controlled speakers would you say you personally use most often in your home?																			
Base: UK adults	1000	509	491	18	119	167	210	486	729	271	207	182	96	74	271	830	40	110	20
Amazon Echo	78%	78%	77%	72%	66%	71%	80%	82%	77%	79%	75%	75%	73%	78%	80%	77%	85%	79%	80%
Google Home	17%	17%	18%	28%	28%	22%	16%	13%	17%	18%	19%	21%	22%	14%	14%	18%	8%	16%	15%
Apple HomePod	1%	2%	1%	-	3%	3%	1%	1%	2%	0%	0%	1%	3%	3%	1%	1%	3%	2%	-
Sonos One	3%	3%	3%	-	3%	4%	3%	3%	3%	2%	4%	1%	1%	4%	5%	3%	3%	2%	-
Other	1%	1%	1%	-	1%	-	0%	1%	1%	0%	1%	2%	1%	1%	-	1%	-	-	5%
Don't know	0%	0%	0%	-	-	1%	-	0%	-	1%	-	-	-	-	-	-	3%	1%	-
Not applicable - I do not personally use a smart voice-controlled speaker in my home	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

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YouGov - Smart Speakers

Sample: 1,000 UK adults who own smart speakers

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In general, how well, if at all, would you say each of the following smart speakers work (e.g. correctly answers your requests etc.)? (Please select one option on each row)

TM_Q1_1. Amazon Echo

	Total	Gender		Age					Social Grade		Region								
		Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: All UK Adults that use the listed smart speakers in their home	803	412	391	13	81	130	174	405	583	220	158	147	72	61	224	662	35	90	16
Very well	33%	35%	30%	38%	22%	30%	31%	36%	29%	43%	35%	33%	29%	31%	26%	31%	51%	41%	31%
Fairly well	60%	57%	63%	54%	73%	62%	63%	56%	64%	50%	58%	61%	65%	49%	66%	61%	49%	56%	63%
Not very well	7%	6%	7%	8%	2%	6%	6%	8%	7%	7%	7%	6%	6%	16%	8%	8%	-	2%	-
Not well at all	1%	0%	1%	-	2%	-	-	0%	1%	-	-	-	-	2%	1%	0%	-	-	6%
Don't know	0%	0%	-	-	-	2%	-	-	0%	-	-	-	-	2%	-	0%	-	1%	-
Net: Well	93%	93%	93%	92%	95%	92%	94%	92%	92%	93%	93%	94%	94%	80%	92%	92%	100%	97%	94%
Net: Not well	7%	7%	7%	8%	5%	6%	6%	8%	7%	7%	7%	6%	6%	18%	8%	8%	-	2%	6%

TM_Q1_2. Google Home

	Total	Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: All UK Adults that use the listed smart speakers in their home	208	107	101	6	36	45	43	78	148	60	49	44	24	15	47	179	5	21	3
Very well	35%	36%	33%	67%	28%	20%	47%	37%	35%	33%	45%	30%	25%	40%	38%	36%	40%	14%	67%
Fairly well	53%	50%	56%	33%	67%	64%	37%	51%	53%	55%	47%	66%	58%	47%	43%	52%	40%	71%	33%
Not very well	11%	11%	11%	-	6%	11%	16%	12%	11%	12%	8%	5%	13%	13%	19%	11%	20%	10%	-
Not well at all	0%	1%	-	-	-	2%	-	-	1%	-	-	-	4%	-	-	1%	-	-	-
Don't know	0%	1%	-	-	-	2%	-	-	1%	-	-	-	-	-	-	-	-	5%	-
Net: Well	88%	87%	89%	100%	94%	84%	84%	88%	88%	88%	92%	95%	83%	87%	81%	88%	80%	86%	100%
Net: Not well	12%	12%	11%	-	6%	13%	16%	12%	11%	12%	8%	5%	17%	13%	19%	12%	20%	10%	-

TM_Q1_3. Apple HomePod

	Total	Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: All UK Adults that use the listed smart speakers in their home	19	10	9	-	4	6	5	4	16	3	1	3	3	3	5	15	1	3	-
Very well	53%	60%	44%	-	25%	67%	60%	50%	56%	33%	100%	33%	67%	33%	60%	53%	-	67%	-
Fairly well	32%	30%	33%	-	75%	33%	-	25%	25%	67%	-	-	33%	67%	40%	33%	100%	-	-
Not very well	5%	-	11%	-	-	-	20%	-	6%	-	-	33%	-	-	-	7%	-	-	-
Not well at all	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Don't know	11%	10%	11%	-	-	-	20%	25%	13%	-	-	33%	-	-	-	7%	-	33%	-
Net: Well	84%	90%	78%	-	100%	100%	60%	75%	81%	100%	100%	33%	100%	100%	100%	87%	100%	67%	-
Net: Not well	5%	-	11%	-	-	-	20%	-	6%	-	-	33%	-	-	-	7%	-	-	-

TM_Q1_4. Sonos One

	Total	Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: All UK Adults that use the listed smart speakers in their home	48	26	22	-	6	9	14	19	40	8	13	5	1	6	18	43	2	2	1
Very well	42%	54%	27%	-	33%	33%	36%	53%	40%	50%	54%	20%	-	33%	44%	42%	-	50%	100%
Fairly well	44%	27%	64%	-	67%	44%	50%	32%	48%	25%	31%	40%	100%	17%	56%	42%	100%	50%	-
Not very well	10%	15%	5%	-	-	22%	14%	5%	8%	25%	8%	20%	-	50%	-	12%	-	-	-
Not well at all	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Don't know	4%	4%	5%	-	-	-	-	11%	5%	-	8%	20%	-	-	-	5%	-	-	-
Net: Well	85%	81%	91%	-	100%	78%	86%	84%	88%	75%	85%	60%	100%	50%	100%	84%	100%	100%	100%
Net: Not well	10%	15%	5%	-	-	22%	14%	5%	8%	25%	8%	20%	-	50%	-	12%	-	-	-

YouGov - Smart Speakers

Sample: 1,000 UK adults who own smart speakers

Fieldwork: 11th - 15th April 2019

TM_Q2_rb. You previously said that you use $speaker most often...In general, how often, if at all, does this smart speaker fail to respond to a voice command you have personally given?

	Total	Gender		Age					Social Grade		Region								
		Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: All UK Adults that use smart speakers in their home	1000	509	491	18	119	167	210	486	729	271	207	182	96	74	271	830	40	110	20
Always	3%	3%	2%	6%	5%	3%	1%	2%	2%	3%	5%	3%	2%	1%	2%	3%	5%	-	-
Often	13%	11%	16%	22%	18%	17%	10%	12%	14%	11%	14%	9%	16%	23%	15%	14%	10%	7%	20%
Sometimes	45%	40%	49%	28%	45%	54%	52%	38%	45%	43%	38%	48%	47%	41%	48%	45%	38%	45%	45%
Rarely	35%	42%	28%	28%	29%	22%	34%	42%	36%	35%	39%	34%	33%	31%	32%	34%	40%	44%	30%
Never	4%	3%	4%	17%	2%	3%	1%	5%	3%	6%	4%	6%	2%	4%	3%	4%	5%	3%	5%
Don't know	0%	0%	0%	-	1%	1%	0%	0%	0%	1%	0%	1%	-	-	-	0%	-	1%	-
Did not answer	0%	0%	0%	-	-	1%	-	0%	-	1%	-	-	-	-	-	-	3%	1%	-

Still thinking about giving voice command requests to your $speaker1....In general, how often, if at all, do you say or do each of the following? (Please select one option on each row)

TM_Q_3_1_rb. Say "please" and/ or "thank you" to the smart speaker

	Total	Gender		Age					Social Grade		Region								
		Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: All UK Adults that use smart speakers in their home	1000	509	491	18	119	167	210	486	729	271	207	182	96	74	271	830	40	110	20
Always	10%	7%	12%	6%	8%	11%	10%	10%	9%	12%	8%	10%	10%	7%	10%	9%	28%	7%	10%
Often	28%	23%	33%	44%	20%	24%	29%	29%	26%	33%	28%	28%	22%	19%	32%	28%	35%	25%	20%
Sometimes	26%	24%	27%	39%	22%	23%	30%	26%	27%	23%	29%	30%	26%	31%	23%	27%	8%	25%	20%
Rarely	17%	20%	14%	-	26%	20%	14%	16%	18%	15%	14%	18%	20%	19%	17%	17%	15%	17%	25%
Never	19%	25%	13%	11%	24%	22%	17%	19%	21%	16%	20%	14%	22%	24%	18%	19%	13%	25%	25%
Don't know	0%	0%	0%	-	-	-	0%	0%	-	1%	1%	-	-	-	-	0%	-	-	-
Did not answer	0%	0%	0%	-	-	1%	-	0%	-	1%	-	-	-	-	-	-	3%	1%	-

TM_Q_3_2_rb. Be rude to the smart speaker

	Total	Gender		Age					Social Grade		Region								
		Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: All UK Adults that use smart speakers in their home	1000	509	491	18	119	167	210	486	729	271	207	182	96	74	271	830	40	110	20
Always	1%	1%	1%	-	3%	2%	-	1%	1%	1%	1%	1%	1%	-	1%	1%	3%	1%	-
Often	6%	6%	5%	17%	9%	9%	4%	4%	6%	5%	4%	4%	3%	8%	7%	5%	3%	7%	15%
Sometimes	17%	18%	17%	11%	16%	12%	25%	16%	18%	15%	15%	21%	15%	16%	21%	18%	8%	12%	20%
Rarely	31%	30%	31%	28%	30%	32%	37%	28%	32%	27%	26%	30%	36%	30%	32%	30%	35%	31%	40%
Never	45%	45%	46%	44%	40%	45%	35%	51%	43%	51%	54%	43%	45%	46%	39%	45%	50%	48%	25%
Don't know	0%	0%	-	-	1%	-	-	-	0%	-	-	1%	-	-	-	0%	-	-	-
Did not answer	0%	0%	0%	-	-	1%	-	0%	-	1%	-	-	-	-	-	-	3%	1%	-

TM_Q5. In general, how important, if at all, do you think it is to treat a smart speaker in the same way you would treat a real person?

	Total	Gender		Age					Social Grade		Region								
		Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: All UK Adults that use smart speakers in their home	1000	509	491	18	119	167	210	486	729	271	207	182	96	74	271	830	40	110	20
Very important	9%	6%	12%	17%	8%	11%	9%	8%	8%	10%	9%	9%	9%	8%	9%	9%	10%	6%	5%
Fairly important	29%	26%	33%	33%	24%	30%	29%	31%	27%	36%	30%	32%	26%	24%	28%	29%	45%	29%	25%
Not very important	34%	35%	32%	39%	36%	32%	37%	32%	36%	28%	33%	32%	40%	39%	35%	35%	23%	31%	30%
Not at all important	25%	30%	19%	11%	26%	23%	22%	26%	26%	22%	21%	24%	23%	28%	24%	24%	20%	30%	40%
Don't know	4%	3%	5%	-	7%	4%	4%	3%	4%	4%	7%	3%	2%	-	4%	4%	3%	4%	-
Net: Important	38%	32%	45%	50%	31%	41%	37%	39%	35%	46%	39%	41%	35%	32%	37%	38%	55%	35%	30%
Net: Not important	58%	65%	51%	50%	62%	56%	59%	58%	61%	50%	54%	55%	63%	68%	59%	58%	43%	61%	70%

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	Total	Gender		Age					Social Grade		Region								
		Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland

TM_Q6_rb. Still thinking about your $speaker1…As far as you are aware, which ONE, if any, of the following do you think BEST describes what happens when you give a voice command?

	Total	Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: All UK Adults that use smart speakers in their home	1000	509	491	18	119	167	210	486	729	271	207	182	96	74	271	830	40	110	20
The data is recorded and stored over a cloud system owned by the manufacturer of the smart speaker (e.g. Amazon, Apple etc.)	63%	70%	56%	61%	61%	63%	61%	65%	67%	53%	64%	65%	63%	69%	63%	64%	45%	65%	50%
The data is recorded and stored on the smart speaker	7%	6%	9%	22%	13%	5%	10%	5%	6%	10%	10%	7%	3%	7%	7%	7%	8%	6%	15%
The data is not recorded (i.e. it is forgotten by the smart speaker as soon as it has carried out the request)	12%	12%	12%	-	11%	14%	11%	13%	11%	15%	10%	12%	19%	11%	11%	12%	25%	11%	-
None of these	2%	1%	2%	6%	3%	2%	1%	1%	1%	3%	1%	2%	3%	-	1%	1%	5%	1%	10%
Don't know	16%	11%	20%	11%	12%	16%	16%	17%	14%	19%	15%	14%	13%	14%	18%	15%	15%	15%	25%
Did not answer	0%	0%	0%	-	-	1%	-	0%	-	1%	-	-	-	-	-	-	3%	1%	-

You previously said you think your data is recorded when giving a voice command to your $speaker1…As far as you are aware, do you think it's possible to do the following?

TM_Q_7_1. Have access to voice command recordings you have given to your smart speaker

	Total	Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: UK Adults that use a smart speaker most often who believe their data is recorded and stored over a cloud system/ in the speaker itself	706	384	322	15	88	114	150	339	535	171	154	131	63	56	189	593	21	79	13
Yes, it is possible	58%	64%	51%	73%	52%	70%	69%	50%	60%	53%	56%	64%	40%	63%	61%	58%	57%	56%	69%
No, it isn't possible	15%	14%	16%	-	14%	18%	12%	17%	16%	12%	20%	14%	25%	16%	13%	17%	5%	10%	8%
Don't know	26%	21%	33%	27%	34%	12%	19%	32%	24%	35%	23%	22%	35%	21%	26%	25%	38%	34%	23%

TM_Q_7_2. Have your own voice command recordings given to your smart speaker deleted

	Total	Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: UK Adults that use a smart speaker most often who believe their data is recorded and stored over a cloud system/ in the speaker itself	706	384	322	15	88	114	150	339	535	171	154	131	63	56	189	593	21	79	13
Yes, it is possible	30%	35%	24%	27%	38%	39%	38%	22%	31%	26%	29%	37%	29%	30%	30%	31%	10%	29%	23%
No, it isn't possible	18%	18%	17%	27%	16%	22%	13%	18%	18%	16%	21%	17%	16%	14%	17%	18%	29%	14%	23%
Don't know	52%	47%	59%	47%	47%	39%	49%	60%	51%	57%	50%	46%	56%	55%	53%	51%	62%	57%	54%

TM_Q9. If all a stranger had was an audio archive of all the things you had said to your smart speaker(s), do you think it would be possible for them to identify who you were?

	Total	Male	Female	18-24	25-34	35-44	45-54	55+	ABC1	C2DE	North	Midlands	East	London	South	England (NET)	Wales	Scotland	Northern Ireland
Base: UK Adults that use a smart speaker in their home	1000	509	491	18	119	167	210	486	729	271	207	182	96	74	271	830	40	110	20
Yes, I do	22%	23%	21%	44%	27%	22%	28%	17%	23%	18%	26%	23%	20%	28%	18%	22%	15%	21%	15%
No, I don't	57%	57%	57%	44%	50%	54%	55%	61%	57%	56%	54%	52%	57%	55%	62%	57%	68%	54%	70%
Don't know	21%	20%	22%	11%	23%	24%	17%	22%	20%	26%	20%	25%	23%	16%	20%	21%	18%	25%	15%