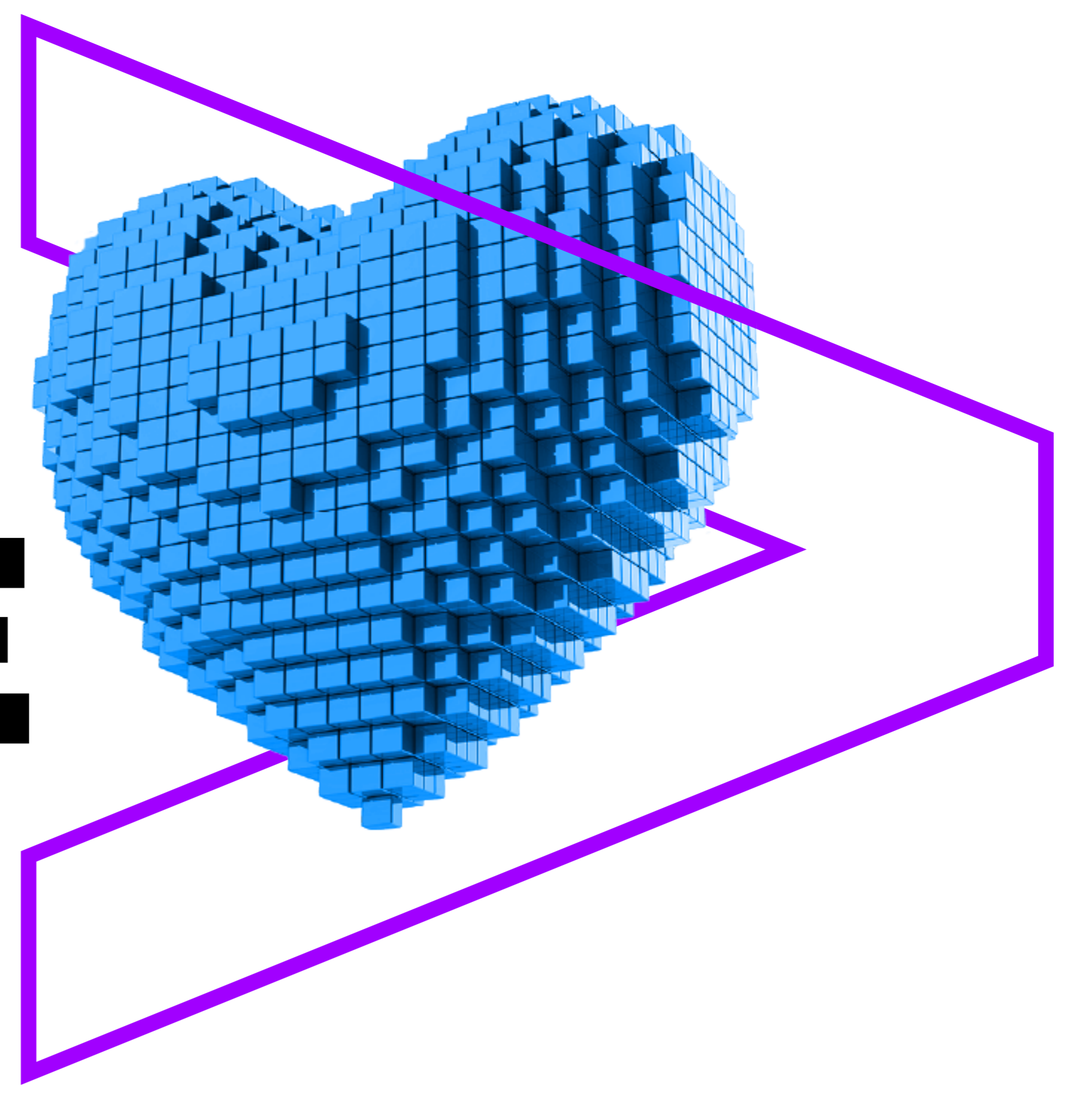


CALL ME BY MY NAME

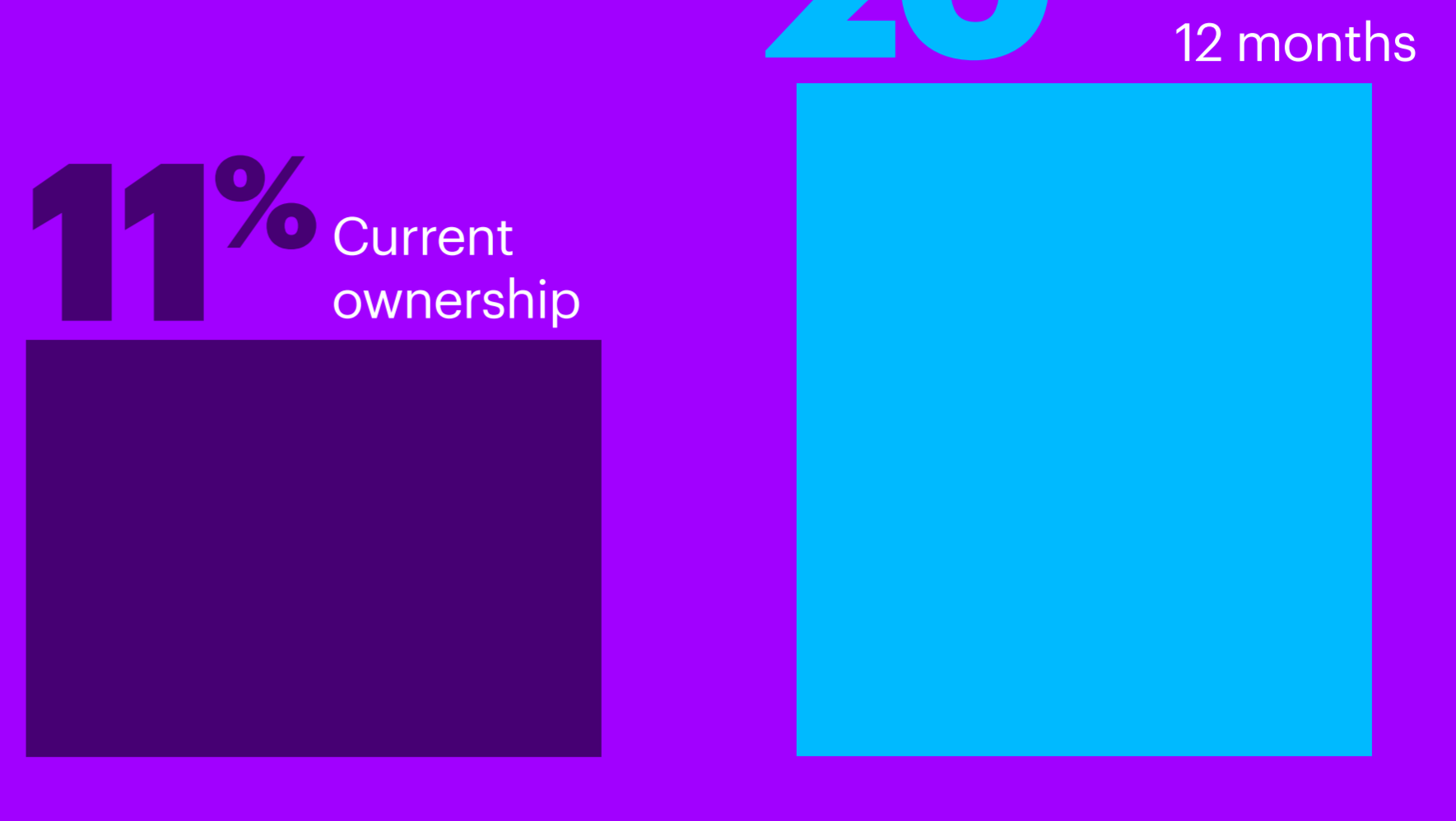
The Continued Rise of Voice Assistants



STANDALONE DIGITAL VOICE ASSISTANTS

ownership increasing rapidly

New findings from the 2018 Accenture Digital Consumer Survey of 21,000 online consumers across the globe reveal continued demand and deeper interactions with standalone digital voice assistants. **11% own** a standalone digital voice assistant today, and **20% plan to purchase** one within the next 12 months.



Consumer adoption of standalone digital voice assistant devices

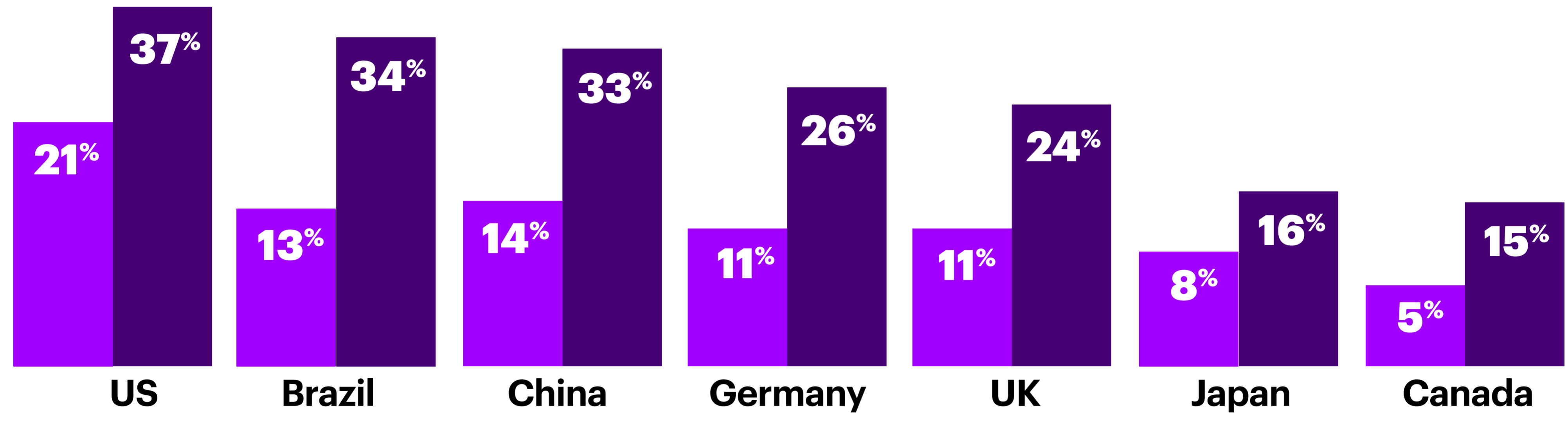
Standalone digital voice assistant (DVA): A hands-free speaker controlled through voice that delivers services such as playing music and providing information, news, sports scores, weather, and more.

Sample base: All respondents, all countries n=21,000

PURCHASE INTENT

1/3 of online consumers in several countries will own a standalone DVA by the end of 2018*

Current and Projected Ownership



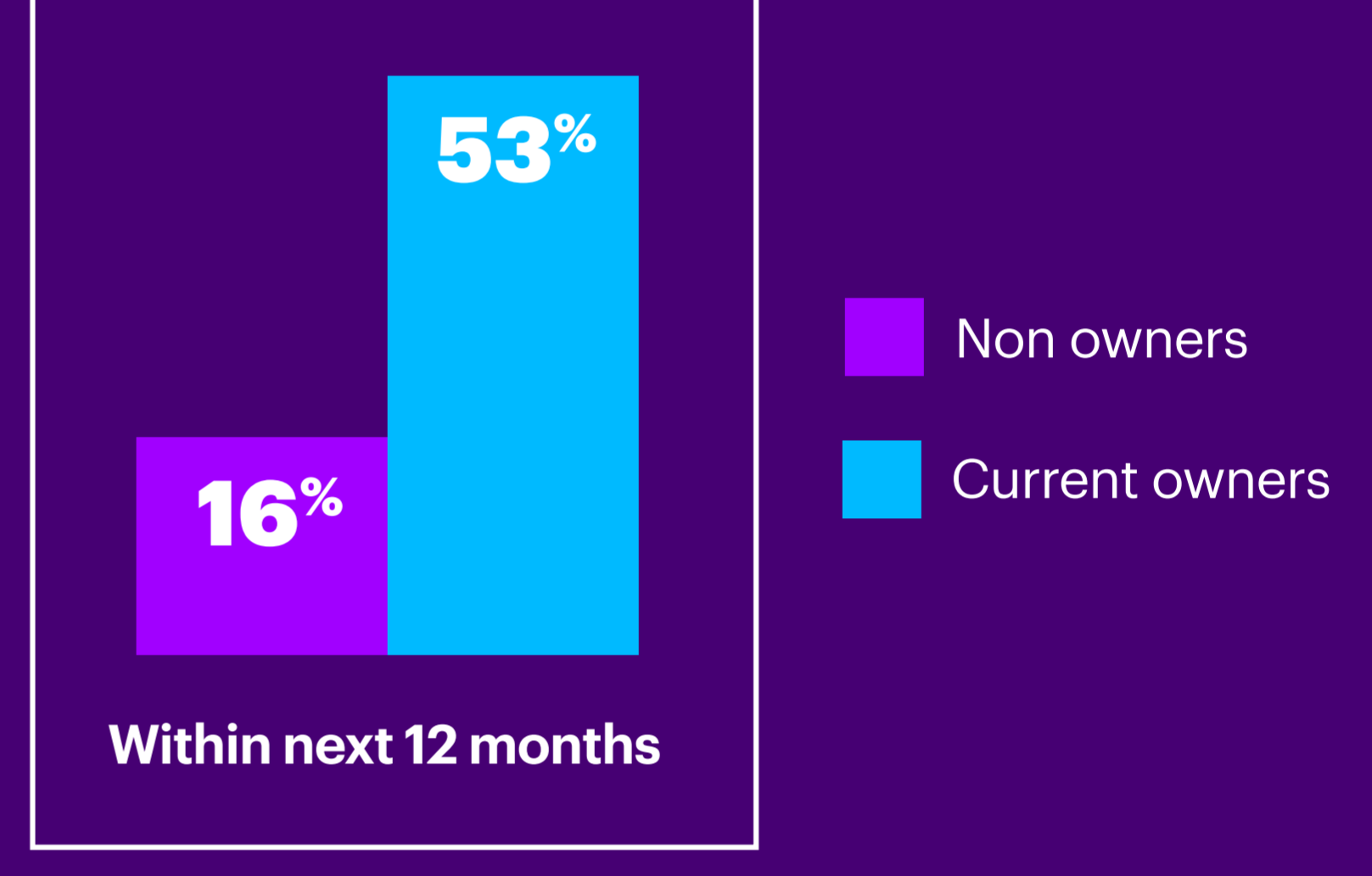
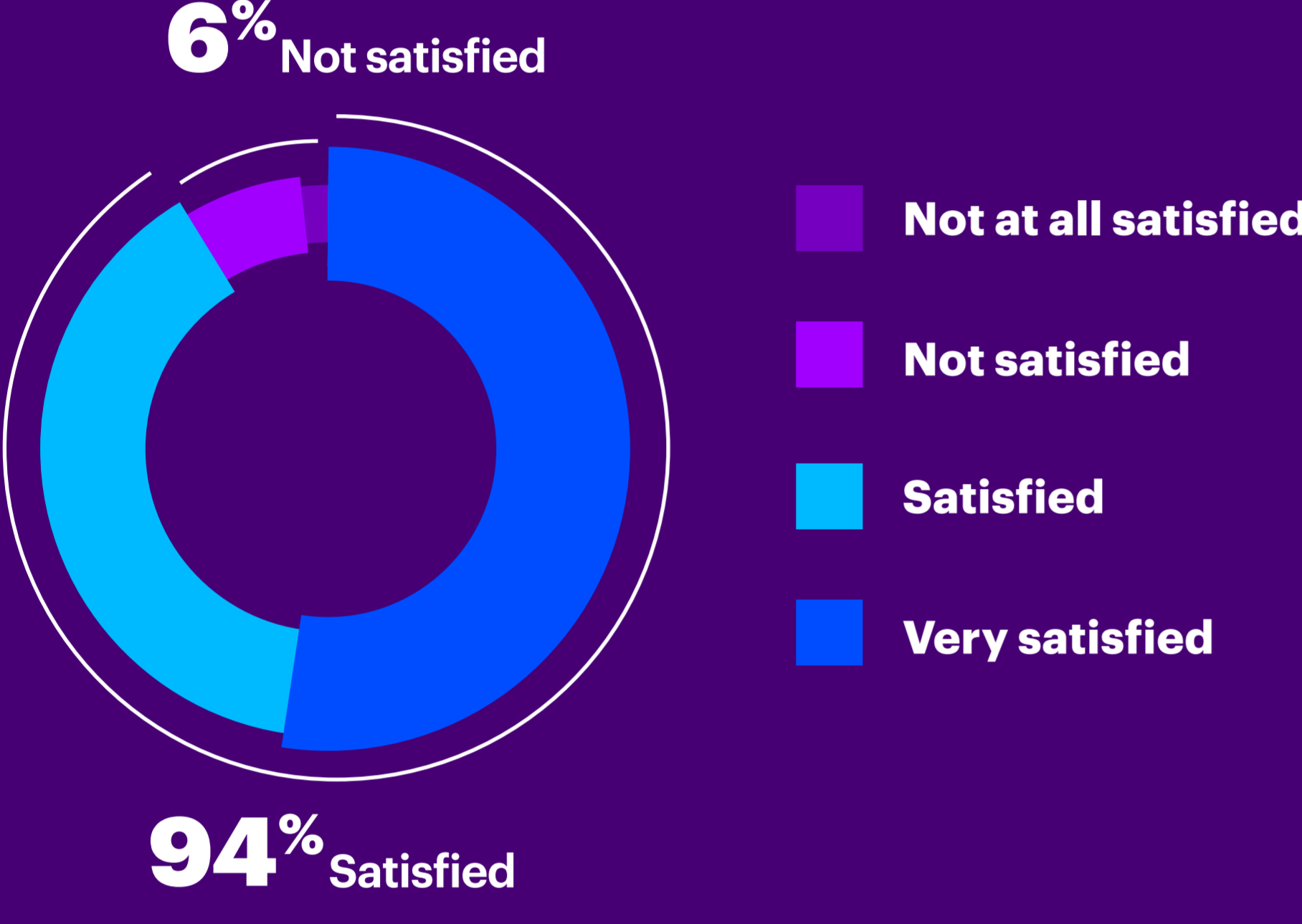
US, Brazil and China will lead the way in standalone DVA penetration among online consumers by the end of 2018.

Sample base: All countries n=1,000 except US and China n=2,000

* Should stated purchase plans hold

3 out of 4 standalone DVA owners use the device daily or several times per week and are **MOSTLY SATISFIED**

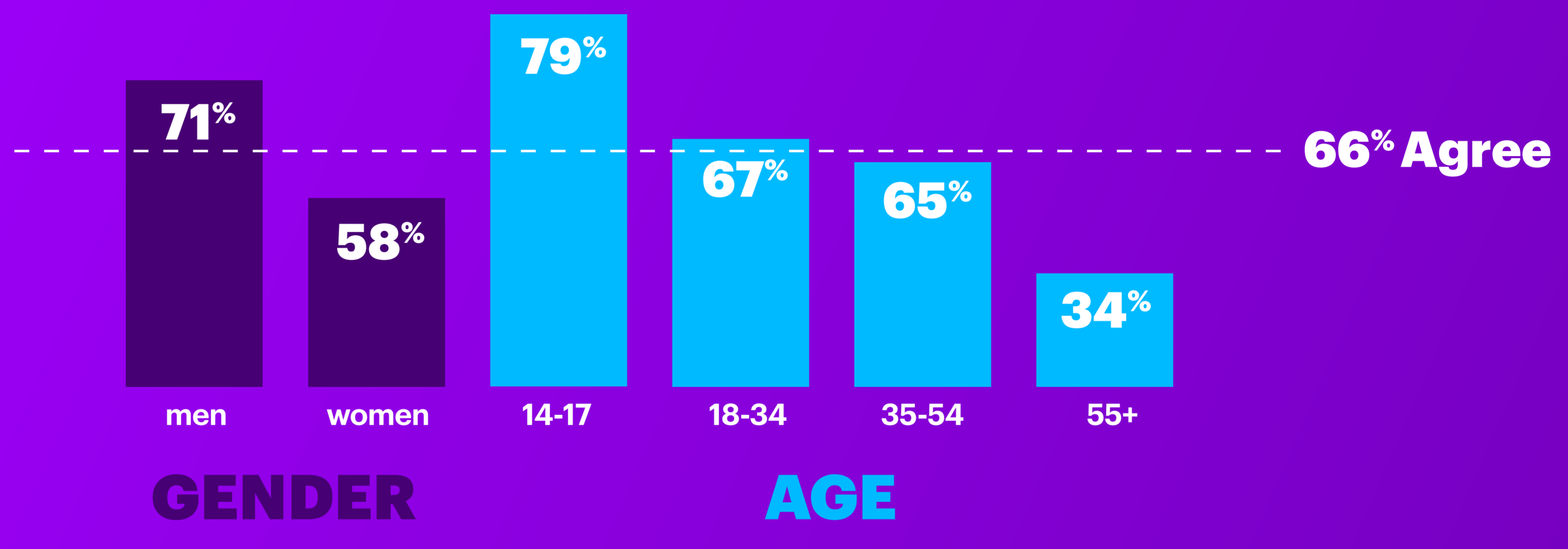
Plan to purchase



53% of current owners plan to purchase an additional DVA within the next 12 months

2 out of 3 consumers who own standalone DVAs **USE THEIR SMARTPHONE LESS**

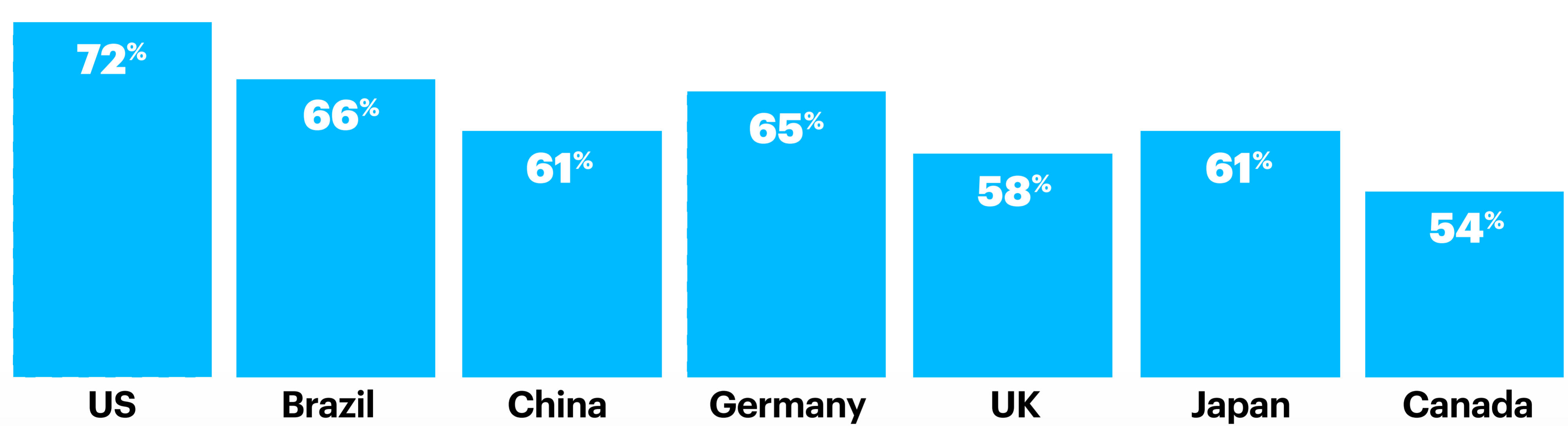
Since I got my digital voice assistant device, I use my smartphone for less activities than before



Sample base: Standalone DVA owners/users n=3,639

Nearly 3 in 4 US consumers use their smartphone less after **ACQUIRING A DVA**

Since I got my digital voice assistant device, I use my smartphone for less activities than before

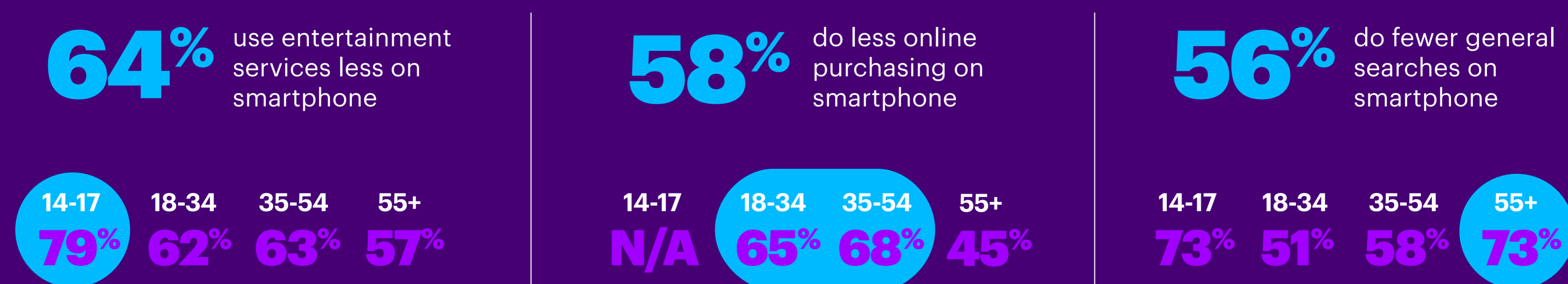


Sample base: Standalone DVA owners/users n=3,639

Entertainment, online purchases, and search are **ALL IMPACTED BY DVA USAGE**

Services **impacted** the most are dependent upon age. **Teens** are most likely to **use entertainment services less**, while those **18-34** and **35-54** are likely to make **fewer purchases** on their **smartphone**, and consumers **55+** **do fewer searches** on their smartphone after acquiring a **standalone DVA**.

Services used less on smartphone after acquiring digital voice assistant



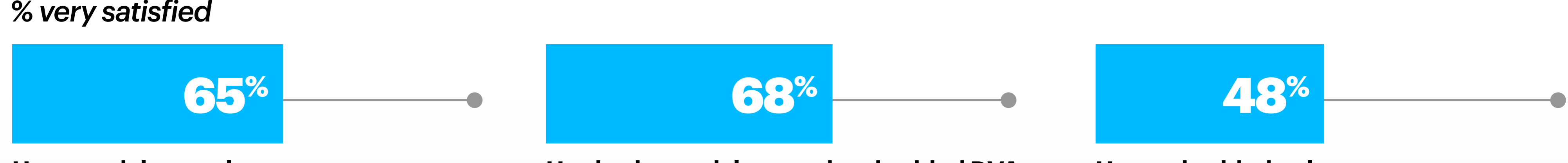
Sample base: Standalone DVA owners/users who use DVA less n=1,493

US CONSUMERS

who use only a standalone DVA are more satisfied than those using only an embedded DVA

US Digital Voice Assistant Satisfaction

% very satisfied



Embedded digital voice assistant (DVA): A DVA embedded in smartphones or PC/computers

Sample base: U.S. Smartphone owners/users n=1,408

Sample base: U.S. Embedded DVA owners/users n=803

For more information on how Accenture can help your business with digital voice strategies or solutions, contact:

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