Smart speakers and voice assistants. Russia and global markets

**Smart speaker shipments in Russia, units.**

- 2018: 40,000
- 2019: 320,000
- 2020: 1,150,000
- 2021: 4,500,000

**2020**

- **1,150,000**
  - Devices powered by voice assistants will be sold in Russia in 2020.
- **~ by 4 times**
  - Russia's smart speaker market is set to grow in 2020.

**60% vs 40%**

- **60%** of the smart devices market will be taken by Yandex and its partners in 2020.
- **40%** of the smart devices will be either powered by Google Assistant or produced by new players.

**$100 mln**

- By 2020, Russia's smart speaker market will grow to $100 million.

**6,000,000**

- By the end of 2021, we expect the number of units shipped in Russia to reach 6 million.

**~13%**

- Of those devices will be smart displays.

As estimated by Just AI
Global smart speaker market

240 mln smart speakers will be sold globally by the end of 2019, as estimated by Just AI.

~1,000,000,000 smart speakers will be sold globally by the end of 2023, as estimated by Just AI.

$7.9 bln was the estimate for the global smart speaker market in 2018.

$32 bln is how much the global smart speaker market is expected to grow in 2023.

As estimated by Just AI

665% was the growth rate of China’s smart speaker market in 2018. China became the world’s second country by smart speaker shipments with 21.9 million devices sold.

According to Canalys

According to IHS Markit
Voice assistants

In Russia

50 mln
people in Russia use voice assistants at least once a month.

- Alice, Yandex — 45 mln users a month (28% of them use Alice in cars)
- Google Assistant — some 7 mln users in Russia
- Siri, Apple — some 8 mln users in Russia

As estimated by Just AI

Globally

3.25 bln
voice assistants were being used globally in early 2019.

According to Juniper Research

8 bln
smart assistants are to be in use globally by 2023. Analysts believe there will be 2-3 assistants per user.

Voice assistants at home

- 58% smartphones
- 22.9% smart speakers
- 11.4% PC and laptops
- 11.3% headphones
- 7.4% TV
- 7.3% smart watches
- 5.3% gaming consoles

US market research by Voicebot.ai, 2018—2019

58%
smartphones

55%
restaurant search

45%
in cars

41.2%
sending text messages

28.7%
music

2018—2019

45% phone calls

50.3% navigation

73.7% in cars

84% web search

70% navigation

66% phone calls

56% sending text messages

55% restaurant search
Voice assistant users in Russia. A survey by Just AI

Tried using voice assistants

- Yes: 71%
- No: 29%

Continue to use

- Yes: 78%
- No: 22%

Assistants that Russians use

- Alice: 77%
- Siri: 16%
- Google Assistant: 13%

Devices they mostly use assistants on

- Smartphone: 90%
- GPS navigator: 4%
- Computer: 2%
- Smart speaker: 3%
- Watch: 1%

A total of 2,120 people from 20 cities in Russia responded to the survey (users of various mobile apps).
Voice assistant users in Russia. A survey by Just AI

The most common use cases
- Web search: 42%
- GPS navigation: 19%
- Weather: 15%
- Phone calls: 13%
- Alarm clock and timer: 6%
- Music: 4%

Usage frequency
- Daily: 29%
- Several times a week: 36%
- Several times a month: 18%
- Hardly ever use: 17%

The age of respondents
- < 18: 11%
- 18-24: 24%
- 25-34: 35%
- 35-44: 18%
- 45-54: 8%
- > 55: 4%

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