

Smart speakers and voice assistants. Russia and global markets

Smart speaker shipments
in Russia, units.



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.

\$100 mln

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

40% of the smart devices will be either powered by Google Assistant or produced by new players.



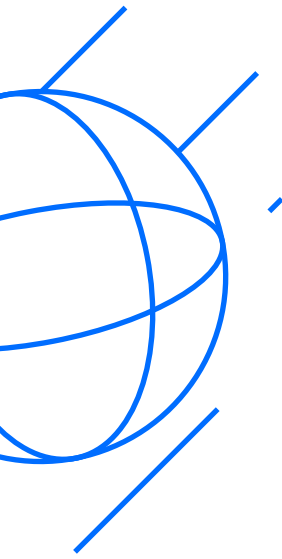
6,000,000

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

~13%

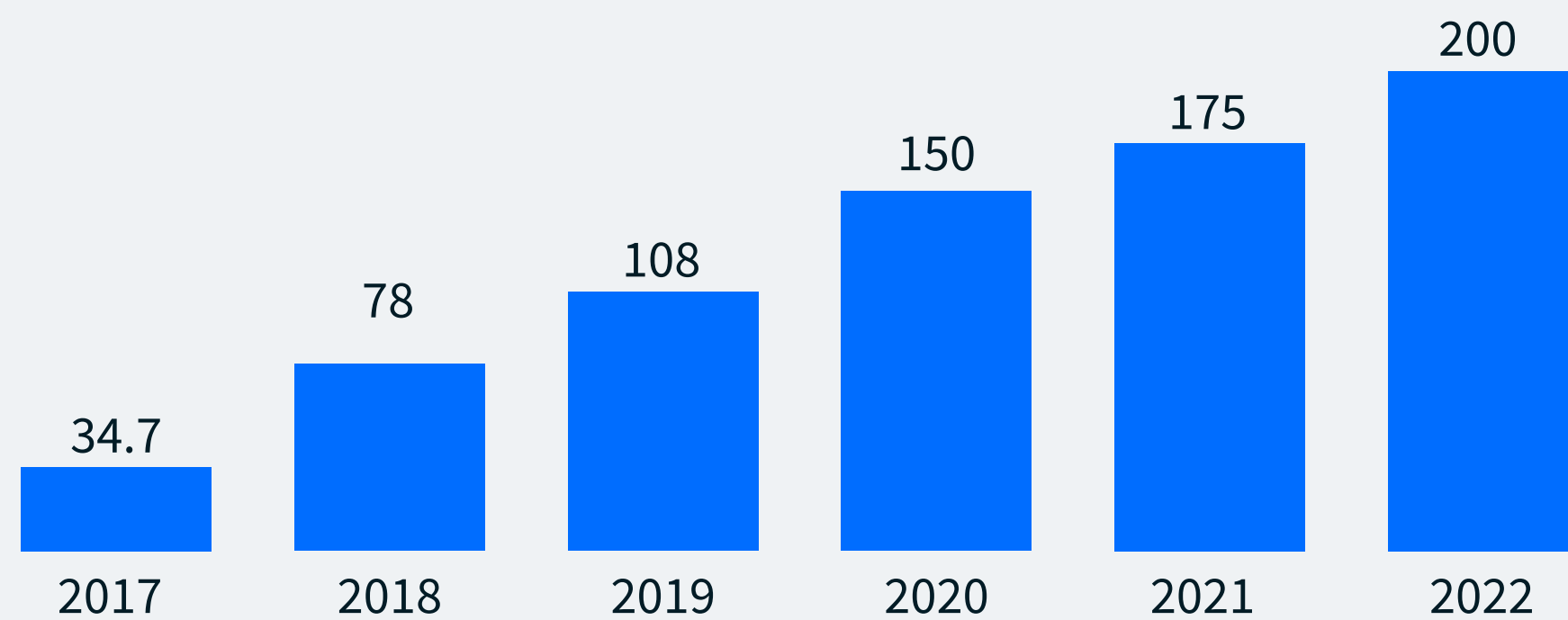
of those devices will be smart displays.

As estimated by Just AI

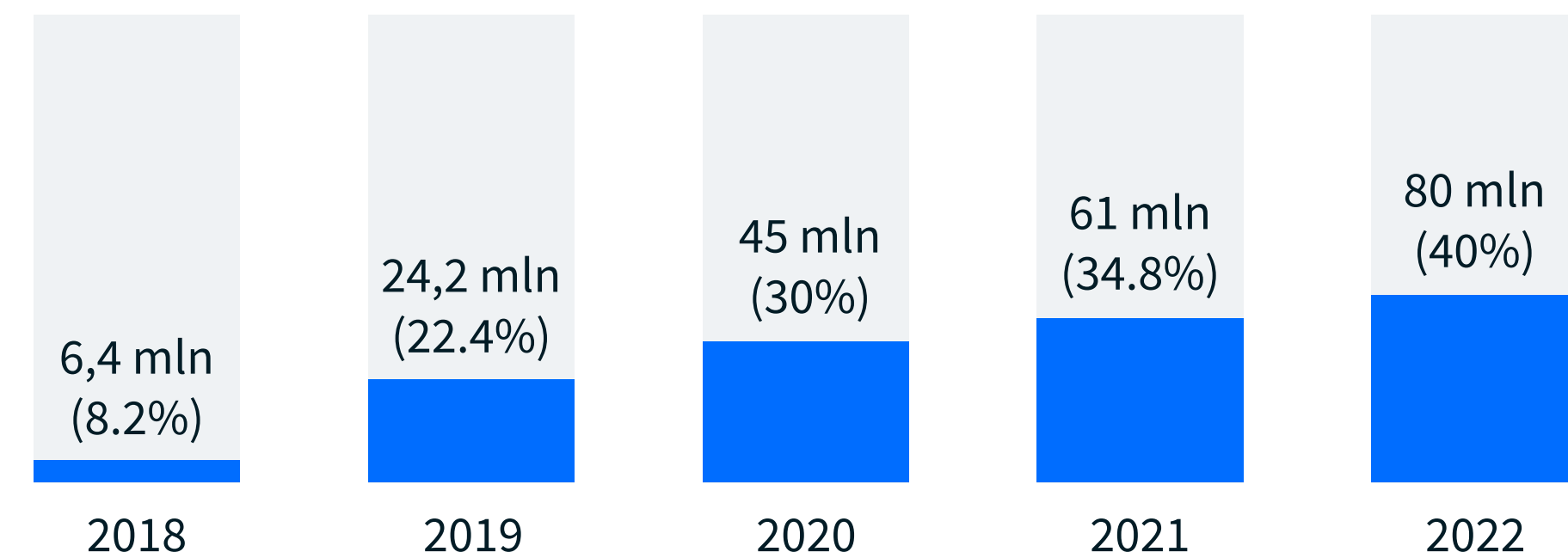
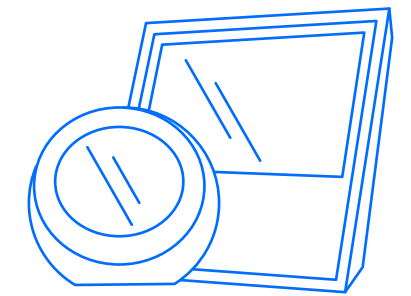


Global smart speaker market

Global smart speaker shipments, millions.



Global smart display market, units (and % of the smart speaker share)



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

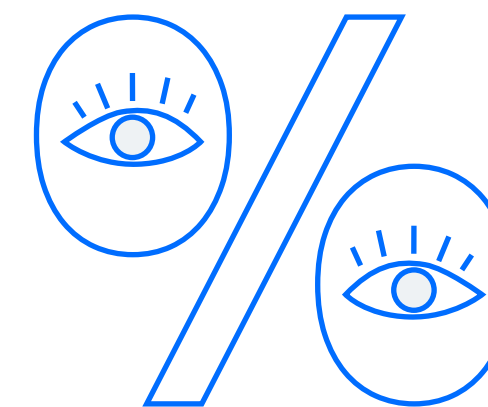
was the estimate for the global smart speaker market in 2018.

\$32 bln

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

According to IHS Markit

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



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

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



58% smartphones

- 84% web search
- 70% navigation
- 66% phone calls
- 56% sending text messages
- 55% restaurant search



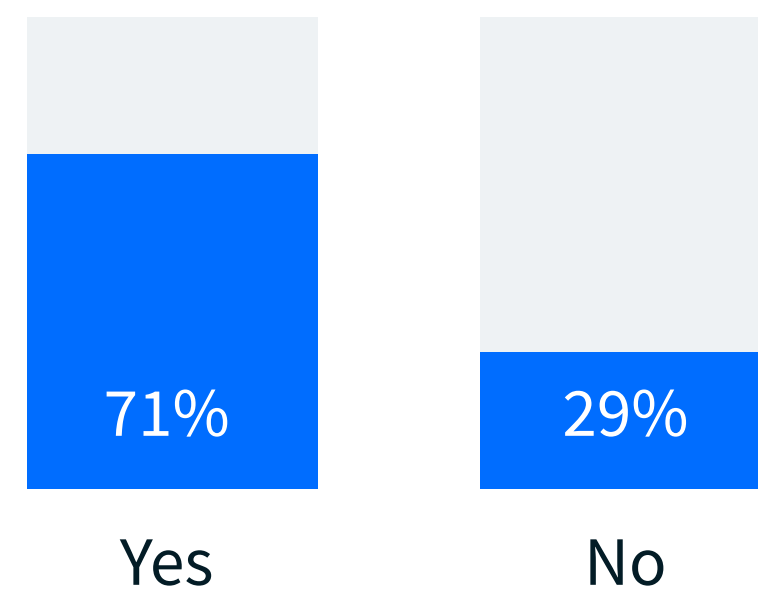
45% in cars

- 73.7% phone calls
- 50.3% navigation
- 41.2% sending text messages
- 28.7% music

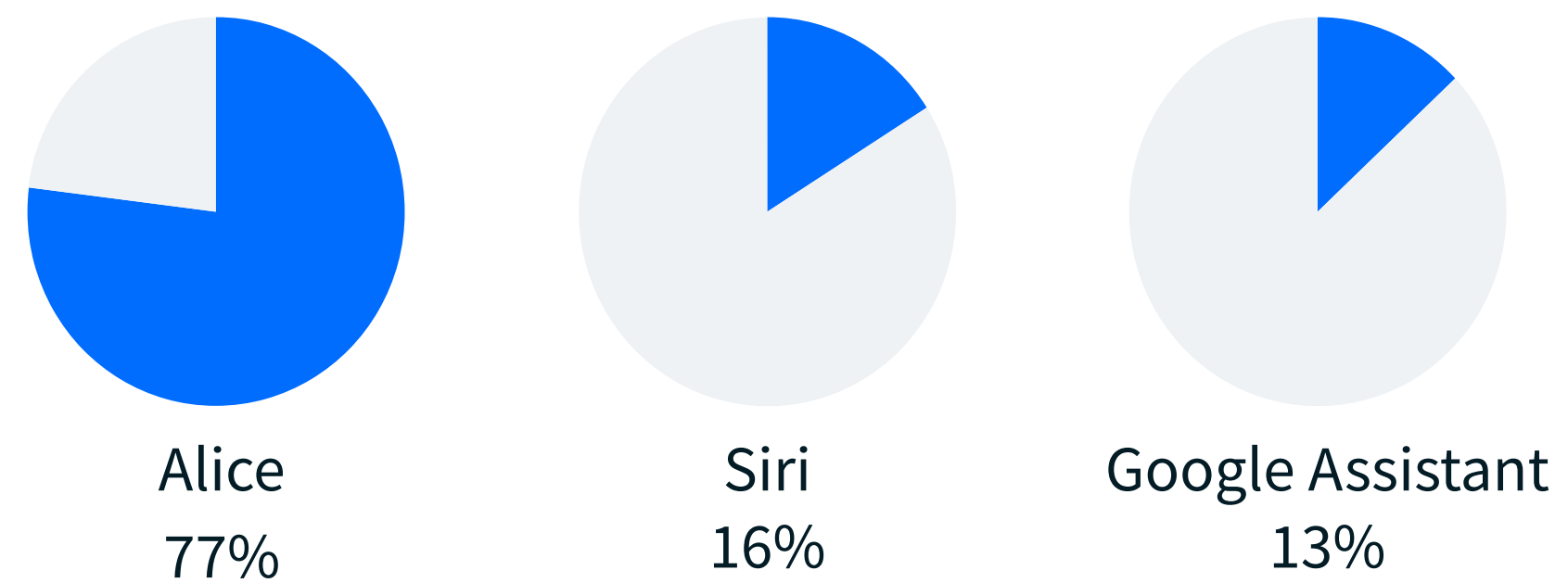
US market research by Voicebot.ai, 2018–2019

Voice assistant users in Russia. A survey by Just AI

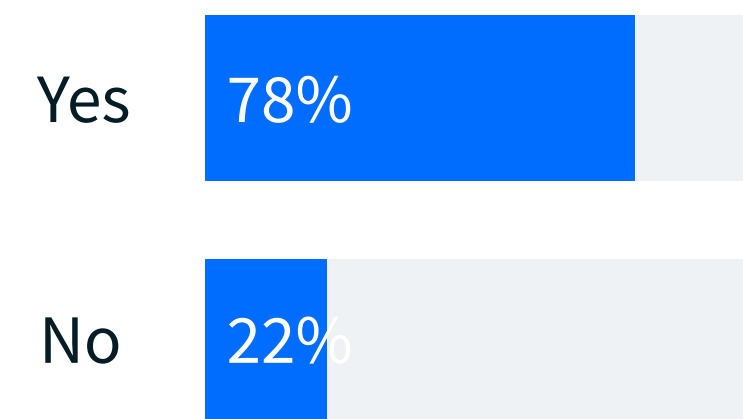
Tried using voice assistants



Assistants that Russians use



Continue to use



Devices they mostly use assistants on

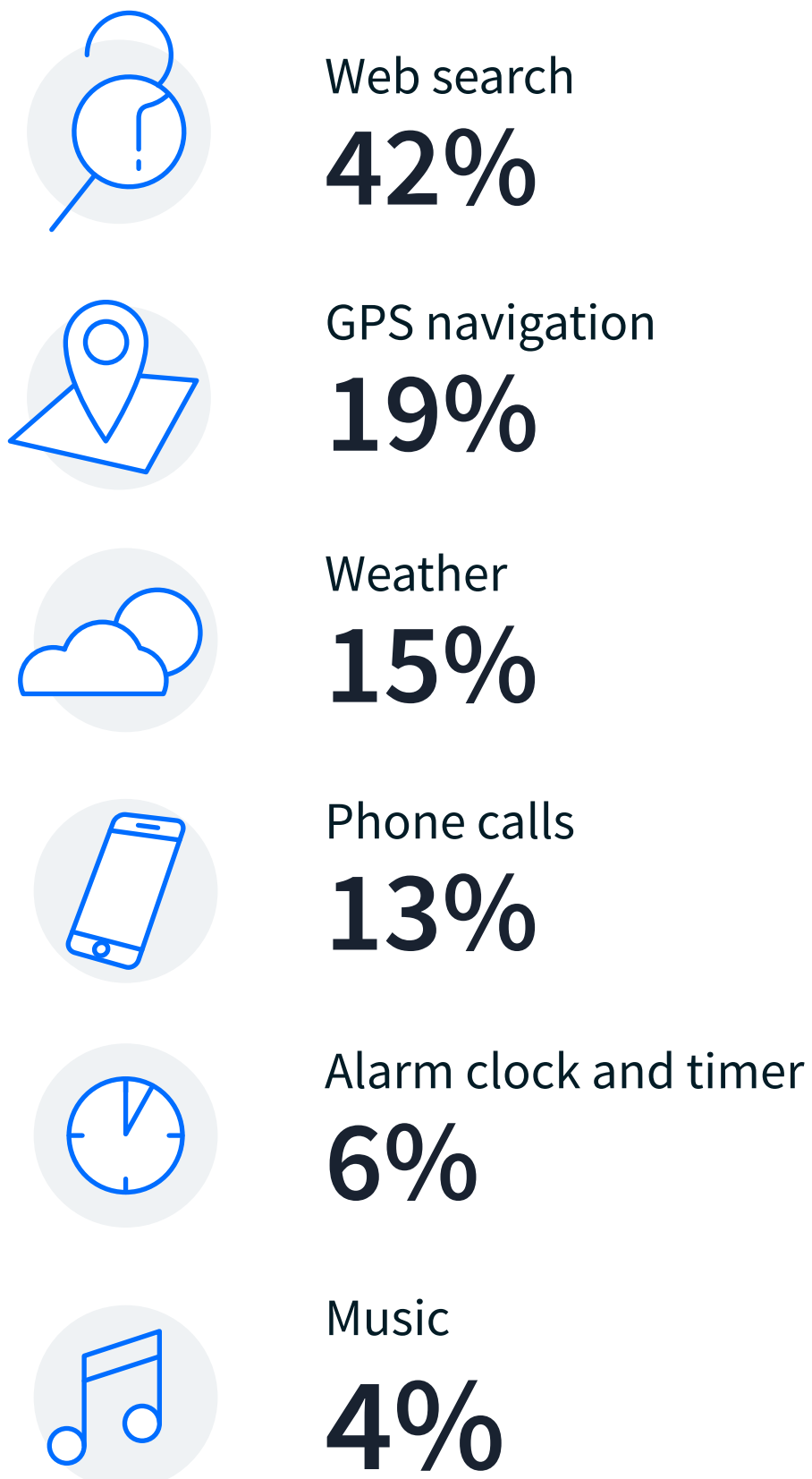


Smartphone 90%
GPS navigator 4%
Computer 2%
Smart speaker 3%
Watch 1%

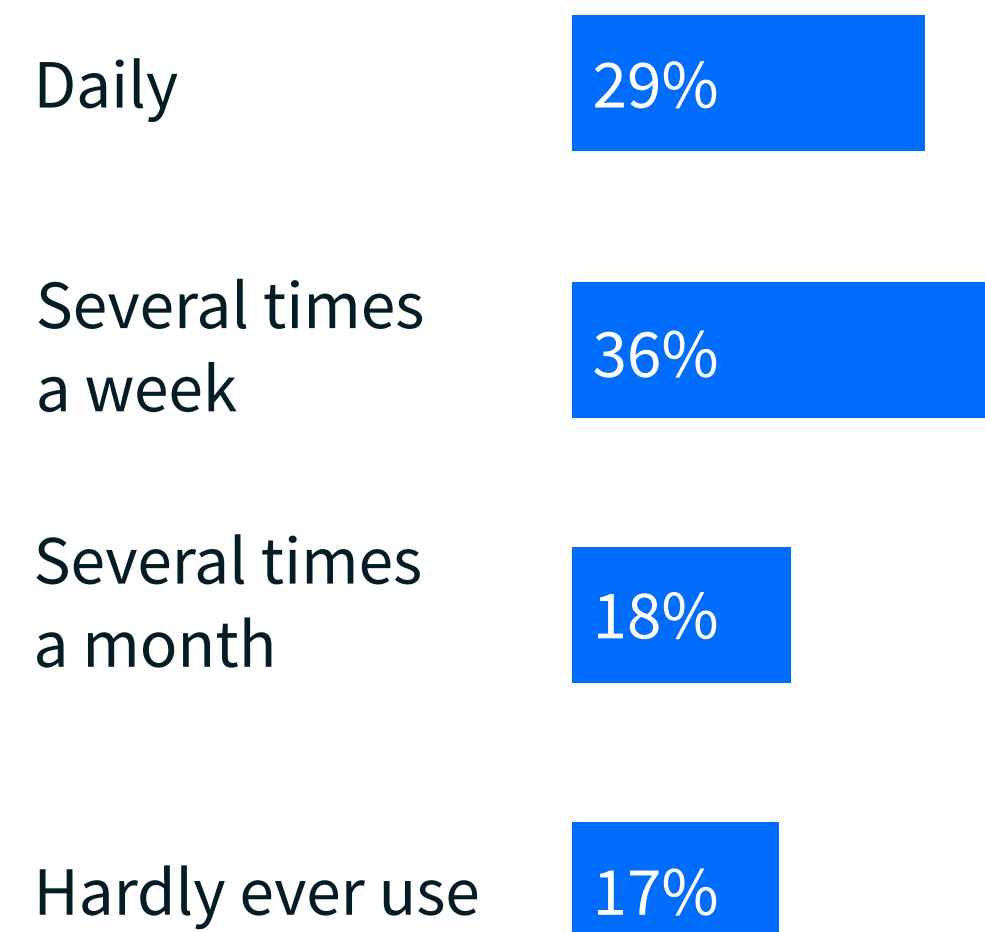
A total of 2,120 people from 20 cities in Russia responded to the survey (users of various mobile apps)

Voice assistant users in Russia. A survey by Just AI

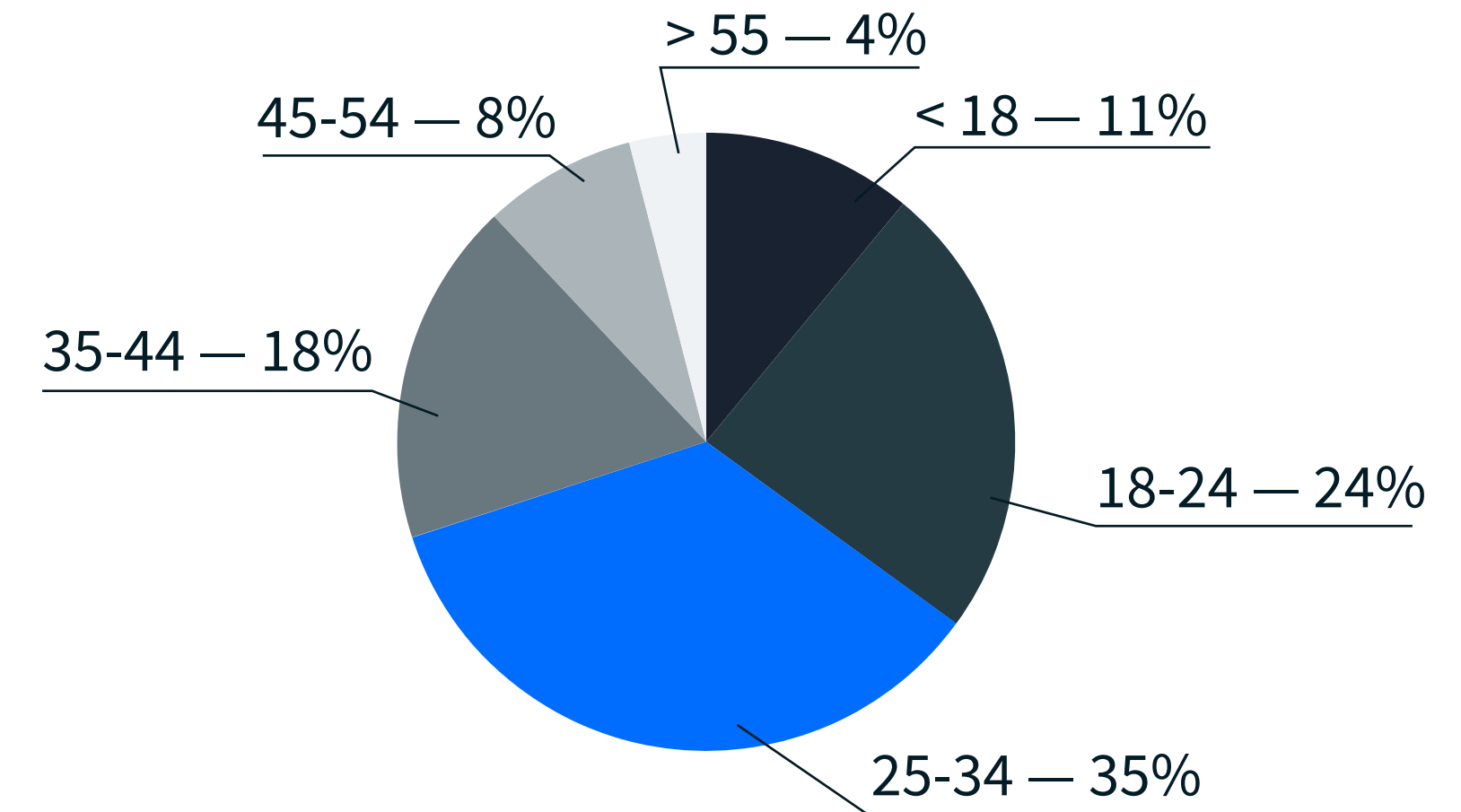
The most common use cases



Usage frequency



The age of respondents



A total of 2,120 people from 20 cities in Russia responded to the survey (users of various mobile apps)