VOICE CONSUMER INDEX 2021

INFORM YOUR BRAND'S VOICE STRATEGY FOR 2022 AND BEYOND.

IN PARTNERSHIP WITH OPEN VOICE NETWORK

CONTENTS

> “...VOICE WILL SOON BE A PRIMARY WAY CONSUMERS CONNECT WITH THE DIGITAL WORLD, AND A PRIMARY WAY THAT DIGITAL MARKETERS WILL CONNECT WITH CONSUMERS...”

JON STINE
EXECUTIVE DIRECTOR, OPEN VOICE NETWORK

INTRODUCING THE VOICE CONSUMER INDEX 2021

VOICE HAS GROWN UP – IT'S THE NEXT MARKETING CHANNEL. CONSUMERS ARE READY TO CONNECT WITH YOU VIA VOICE.

The 2021 Voice Consumer Index confirms that Voice is now a valuable channel for reaching audiences and meeting their needs efficiently and effectively. Despite minor differences in attitudes and opinions towards using Voice assistants in the different countries, we now have data showing a clear alignment with the marketing funnel from awareness through purchase and retention.

Much like web and mobile before it, Voice has evolved from an interface to a distinct consumer channel – with its own behaviors and implications for brands. Our research identifies the attitudes towards Voice technology, how consumers are currently using it, and how users want to interact with voice technology in the future across the US, UK, and Germany – markets which we believe give a representative snapshot of the broader adoption of Voice as a channel.

Based on these findings, brands and marketers will understand the real value Voice can play throughout the customer journey to deliver an enhanced brand experience that will win the hearts and wallets of their audiences.

> "91% OF VOICE CONSUMERS ARE ALREADY SEARCHING VIA VOICE – NOW IS THE TIME TO DO SOMETHING ABOUT THAT."

SOME DEFINITIONS

WHAT DO WE MEAN BY VOICE ASSISTANCE?

A voice controlled artificial intelligence assistant – where the user is primarily using their voice to direct, control or engage with technology via a website, mobile application or smart speaker

WHO IS THE VOICE CONSUMER?

95% ARE MOBILE USERS

66% USE SMART SPEAKERS

31% USE VOICE DAILY

MAJORITY USE VOICE TO SEARCH, CONSUME & SHOP

USERS ARE INTERESTED TO SEE WHERE VOICE WILL GO IN THE FUTURE, DESPITE CONCERNS ABOUT PRIVACY

THEY ARE USING VOICE IN THE HOME, OUT IN THE WORLD AND IN-BETWEEN

KEY FINDINGS

31% OF PEOPLE USE VOICE ASSISTANTS DAILY WITH ALMOST HALF USING THEM AT LEAST ONCE A WEEK

ACROSS ALL MARKETS WE SURVEYED, WE FOUND A VERY SIMILAR USAGE PATTERN – ALMOST 60% OF PEOPLE ARE VOICE ASSISTANT USERS

ASIDE FROM CONTROLLING MUSIC AND GETTING THE WEATHER, THE MOST USAGE IS IN ASKING QUESTIONS VIA A SEARCH ENGINE – OVER 90% HAVE DONE THIS IN ALL MARKETS

OVERALL, CURRENT VOICE CONSUMERS ARE USING VOICE TO SEARCH FOR PRODUCT AND SERVICE INFORMATION (80%), INFORMATION ABOUT LOCAL BUSINESSES (70%) AND BRAND INFORMATION (70%)

MOST VOICE USERS ACCESS THE TECHNOLOGY IN MULTIPLE LOCATIONS (ON SMART SPEAKERS, ON THE WEB, AND ON THEIR PHONE IN AND OUT OF THE HOME)

80% OF THOSE THAT USE VOICE TO START RESEARCHING A NEW PRODUCT OR SERVICE ONLINE WOULD VISIT A PRODUCT OR BRAND WEBSITE

OVER TWO THIRDS (68%) OF VOICE USERS ARE INTERESTED IN HOW THE TECHNOLOGY WILL DEVELOP IN THE FUTURE

RESEARCH RESULTS

The 2021 Voice Consumer Index core questions were designed to provide a clearer understanding of the audiences who are using Voice technology and assistants, their attitudes and ways of using them, and how else they might want to use Voice technology in the future. By reviewing the findings on the following pages, grouped into like categories for the analysis, it becomes clear how brands and marketers can begin to strategically approach adding Voice into their marketing and customer experience efforts to make a positive impact and enhance customer relationships as they guide their audiences through the customer journey.

PLEASE NOTE

These findings are for directional purposes only. It is recommended that a brand conduct its own research to yield insights that are specific to its audience and business objectives.

SECTION ONE

THE AUDIENCES AND THEIR ATTITUDES TOWARDS VOICE

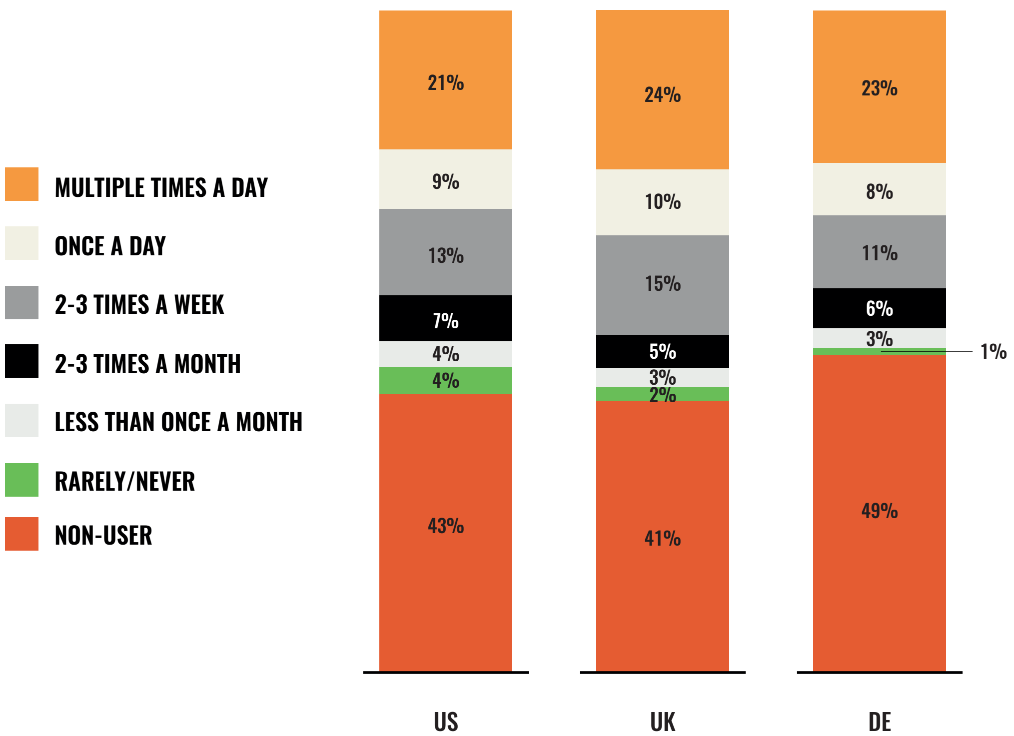
FINDING ONE

VOICE IS PART OF DAILY LIFE FOR MANY

DAILY USAGE IS NOW OVER 30%; WEEKLY USAGE IS ALMOST 50% ACROSS ALL THREE MARKETS.

In 2018, a heavy user could be considered someone who used Voice daily. In this research, we now see over 30% of users (30% US, 34% UK, 31% Germany) are using Voice assistants daily, and over 20% of the population is using them multiple times a day. This indicates that Voice tech is becoming more integrated in the lives of those who use the technology regularly.

VOICE ASSISTANT FREQUENCY OF USE



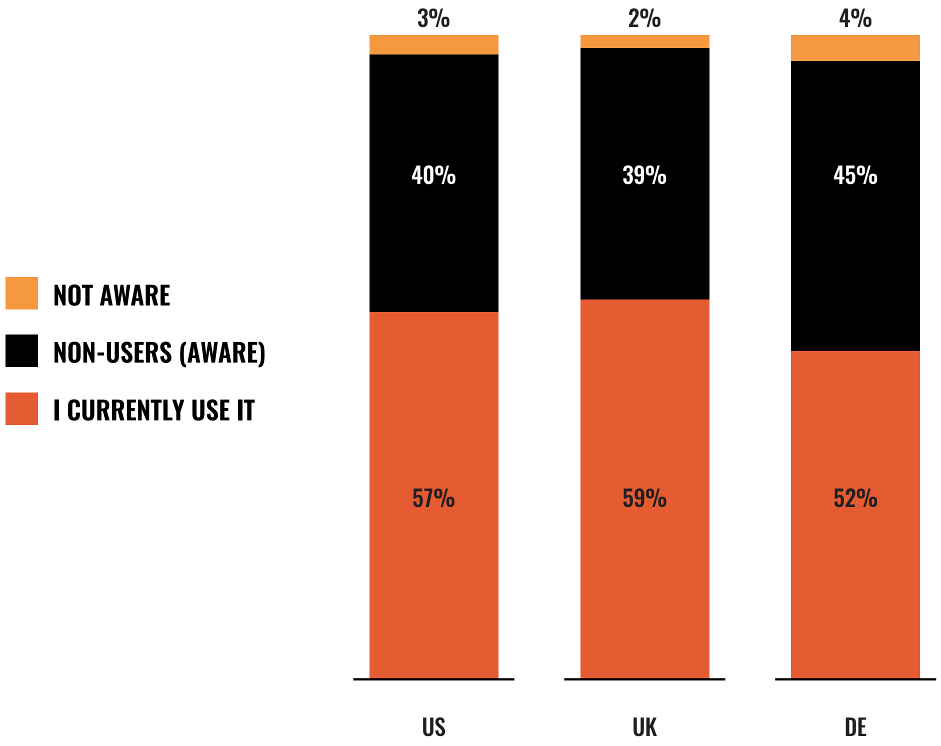
FINDING TWO

THERE IS SIGNIFICANT AWARENESS AND USE OF VOICE ACROSS ALL THREE REGIONS

MOST PEOPLE USE AT LEAST ONE VOICE ASSISTANT.

General awareness of Voice-activated technology is high in all three countries. This isn’t surprising since Apple introduced Siri in 2011 and Amazon Alexa was first released in 2014.

AWARENESS OF VOICE-ACTIVATED TECHNOLOGY



While total awareness is high, more exciting is that we now see over half the population using at least one Voice assistant (57% in the US, 59% in the UK, and 52% in Germany). The fact that around 40% of people are aware of Voice but not using it presents a serious addressable opportunity to consumer-facing brands.

FINDING THREE

VOICE ASSISTANT USAGE IS SPREAD ACROSS ALL AGE GROUPS

THE OPPORTUNITY IS NOT JUST FOR BRANDS WITH YOUNGER AUDIENCES.

US	18-24	25-34	35-44	45-54	55-64	65+
ALEXA (AMAZON)	19%	29%	39%	34%	40%	41%
SIRI (APPLE)	60%	36%	19%	31%	28%	28%
GOOGLE ASSISTANT	18%	30%	35%	31%	29%	23%
CORTANA (MICROSOFT)	2%	1%	3%	2%	2%	6%
BIXBY (SAMSUNG)	2%	4%	3%	2%	1%	2%

UK	18-24	25-34	35-44	45-54	55-64	65+
ALEXA (AMAZON)	32%	50%	59%	61%	71%	63%
SIRI (APPLE)	42%	24%	14%	12%	13%	15%
GOOGLE ASSISTANT	19%	20%	23%	25%	14%	21%
CORTANA (MICROSOFT)	3%	2%	2%	1%	2%	2%
BIXBY (SAMSUNG)	3%	4%	2%	1%	0%	0%

GERMANY	18-24	25-34	35-44	45-54	55-64	65+
ALEXA (AMAZON)	25%	35%	54%	48%	55%	46%
SIRI (APPLE)	49%	28%	14%	13%	15%	17%
GOOGLE ASSISTANT	17%	23%	25%	34%	23%	34%
CORTANA (MICROSOFT)	4%	5%	4%	2%	7%	2%
BIXBY (SAMSUNG)	5%	8%	4%	2%	1%	1%

There is always a tendency to assume that new technology adoption and usage skews heavily towards younger age groups. However, with Voice assistants we are seeing that the technology appeals to a much wider age range of people. While there may be less familiarity and confidence with Voice assistants in certain demographics, brands that do the work of educating their audiences about their Voice experiences will reap the biggest results.

FINDING FOUR

PRIVACY IS A CONCERN BUT NOT A BARRIER AMONG USERS

USERS SEE THE VALUE AND BENEFIT OF VOICE IN THEIR LIVES AND THEY ARE INTERESTED IN DOING MORE. PRIVACY IS NOT JUST ABOUT DATA, IT'S ALSO ABOUT WHO IS AROUND.

USER ATTITUDES TOWARDS VOICE ASSISTANTS

	US	UK	GERMANY
I AM CONCERNED ABOUT THE PRIVACY OF MY DATA WHEN USING VOICE	52%	50%	47%
I'M INTERESTED IN HOW VOICE TECHNOLOGY WILL DEVELOP IN THE FUTURE	51%	52%	50%
USING A VOICE ASSISTANT TO SEARCH IS QUICKER THAN TEXT	48%	46%	46%
VOICE ASSISTANTS HELP ME TO SEARCH EFFECTIVELY FOR INFORMATION	47%	44%	42%
EVERYONE WILL BE USING VOICE ASSISTANTS IN THE FUTURE	47%	49%	35%
I WANT TO KNOW WHAT ELSE I CAN DO USING VOICE ASSISTANTS	45%	46%	45%
I FEEL COMFORTABLE USING MY VOICE ASSISTANT WHEN I'M WITH MY FRIENDS AND FAMILY	45%	43%	28%
I WANT TO BE ABLE TO DO MORE WITH A VOICE ASSISTANT	40%	40%	35%
VOICE ASSISTANTS HELP ME MULTITASK	39%	36%	36%
VOICE ASSISTANTS AREN'T FOR ME	34%	37%	36%
VOICE ASSISTANTS ARE USEFUL FOR HELPING TO KEEP ME ORGANISED	34%	35%	39%
I TURN OFF MY VOICE ASSISTANT WHEN I'M NOT USING IT	33%	32%	36%
I DON'T TRUST VOICE ASSISTANTS	30%	31%	38%
I FIND VOICE ASSISTANTS FRUSTRATING	28%	31%	23%
I FEEL COMFORTABLE USING MY VOICE ASSISTANT IN PUBLIC	27%	22%	20%
I CAN NEVER GET THE ANSWERS I WANT WHEN USING VOICE ASSISTANTS	20%	20%	20%
VOICE ASSISTANTS CONFUSE ME	20%	20%	22%

We know that when it comes to Voice technology, privacy is a concern for users and it is an important issue to be addressed. However, while users may be concerned about their privacy, they are still using it because they see a positive value exchange for easier experiences and convenience. Users recognize that Voice technology can make it easier for them to send text messages, get information, and even control their smarthome.

When we think about privacy, we need to recognize there are actually two types of privacy in play: data privacy and spatial privacy. The concept of spatial privacy refers to where a user is, and who is around them, when they are using their Voice assistant. When it comes to using their Voice assistant in public, less than 27% feel comfortable doing so in the US and it drops closer to 20% in the UK and Germany. Those numbers increase when around family and friends in the UK and the US – but that can be dependent upon location as well.

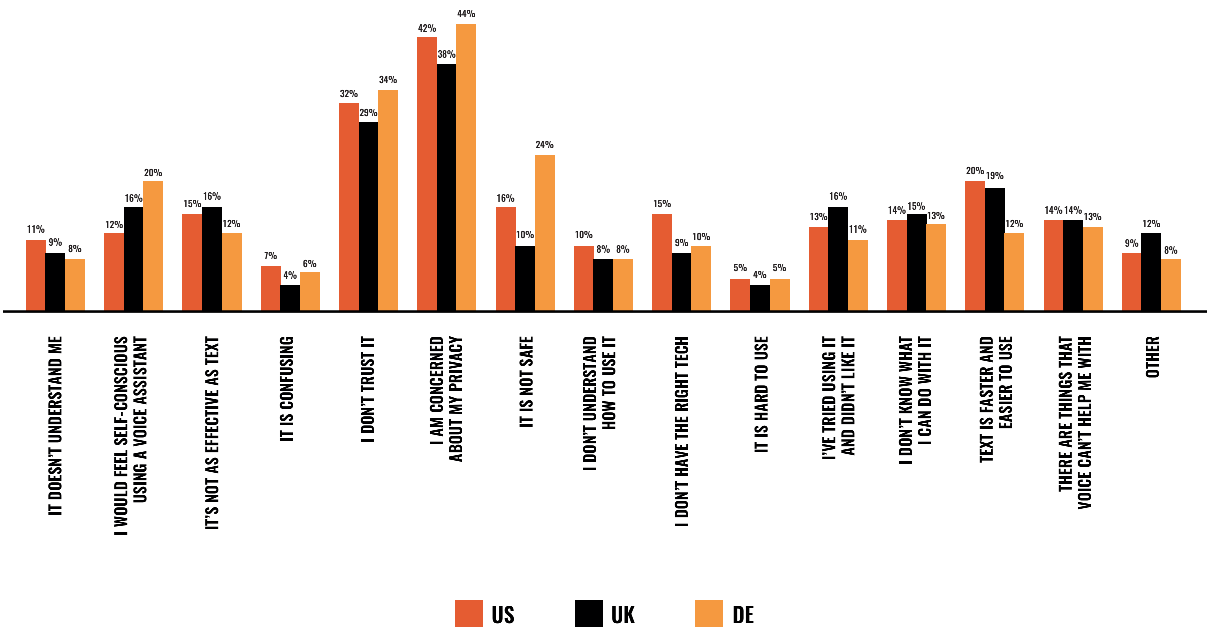
Digging deeper into the data, users indicate a desire to know what else they can do with their assistants. This can be addressed through education and communicating what they can and can't do at the Voice application level. Brands that drive their audiences to their Voice experiences can take advantage of existing communication channels to explain the benefits these Voice experiences offer.

FINDING FIVE

PRIVACY, TRUST, AND EVEN SAFETY ARE BARRIERS FOR NON-USERS

THEY UNDERSTAND VOICE BUT THEY DO NOT SEE ENOUGH VALUE TO PUSH THEIR COMFORT LEVELS.

BARRIERS TO USING VOICE ACTIVATED TECHNOLOGY



Privacy and trust are stated as main barriers to non-users, so much so that they will not use Voice assistants. Addressing these concerns requires a combination of education and continued exploration of privacy standards to provide assurances to potential and existing Voice assistant users.

Non-users also indicate feeling self conscious is a barrier to Voice assistant adoption. Some of the self-conscious feelings will dissipate as Voice assistant and smart speaker adoption grows and the behavior normalizes in each country. The US leads adoption of smart speakers and has the lowest percentage of self-consciousness (12%), with the UK following closely behind (16%), and Germany, which is less mature in its smart speaker adoption, has the highest (20%).

FINDING SIX

WHILE USERS SEE THE VALUE OF VOICE, THEY NEED MORE SUPPORT FROM BRANDS AND CREATORS TO LEARN ALL THAT IT CAN DO FOR THEM

MOST USERS ARE RELYING ON TRIAL AND ERROR TO FIND THE EXPERIENCES THEY WANT.

WAYS USERS LEARN TO USE VOICE ASSISTANTS	US	UK	GERMANY
TRIAL AND ERROR / I HAD A GO	70%	76%	85%
PRODUCT INSTRUCTIONS OR PACKAGING	52%	57%	52%
A FRIEND OR FAMILY MEMBER SHOWED ME	52%	46%	52%
RECOMMENDATION FROM A FRIEND OR FAMILY MEMBER	47%	47%	51%
I LISTENED IN TO HOW A FRIEND OR FAMILY MEMBER SPOKE TO THE VOICE ASSISTANT AND I COPIED THEM	47%	46%	52%
THE PRODUCT'S WEBSITE OR WELCOME EMAIL	45%	47%	38%
SEARCHING ONLINE FOR ALEXA SKILLS OR ACTIONS ON GOOGLE	42%	47%	56%
EXAMPLES SHOWN IN ADVERTISING SUCH AS TV, RADIO ADVERTS OR SOCIAL	38%	38%	43%
READING CONSUMER OR TECH NEWS, BLOGS OR REVIEWS TO FIND OUT WHAT I CAN DO WITH MY VOICE ASSISTANT	30%	34%	43%

People want to do more with their Voice assistants. In their discoverability quest, 77% of users are using trial and error to learn how to use their Voice assistants. They are also looking at product packaging, tapping into relatives and friends, even looking at product websites and emails. Instead of Voice experiences being merely stumbled upon, brands can drive awareness via all of their marketing and communication channels.

Users are also searching online for Alexa Skills or Actions on Google. This means descriptions are important for not just explaining the Voice application but also for helping a user find it and decide to try it. If you are creating Alexa Skills or Google Actions, a cursory description is not going to help engagement.

Another interesting point is that while marketing and advertising is rated relatively low at 38% for the US and UK and 43% for Germany, there haven't been that many integrated campaigns in the US that mention or showcase Voice applications as part of the messaging. Yes, there have been notable television spots featuring Amazon Alexa and Google Assistant, and a few campaigns by Headspace, Nutella, Food Network, Coca-Cola, and Roomba, but ads are not yet commonplace. There is an opportunity for a brand to not only drive traffic to their Voice application but to also help their audiences learn more about Voice tech.

Education is key and hoping people find the Voice experiences we create is really not the way to be doing things. There is an upside to be gained with an integrated approach so that no matter the touchpoint, users are learning about this new and innovative way of doing things that's easier, faster, more accessible, and more convenient.

SECTION TWO

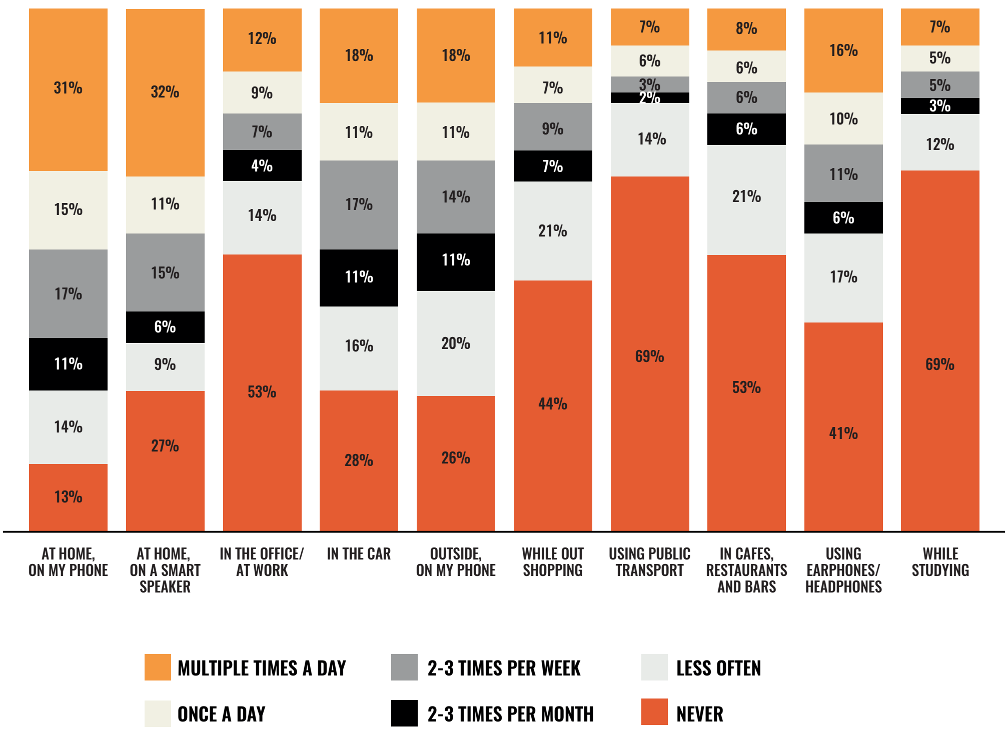
THE WAYS AUDIENCES ARE USING VOICE

FINDING SEVEN

HOME IS WHERE THE VOICE ASSISTANT IS USED MOST

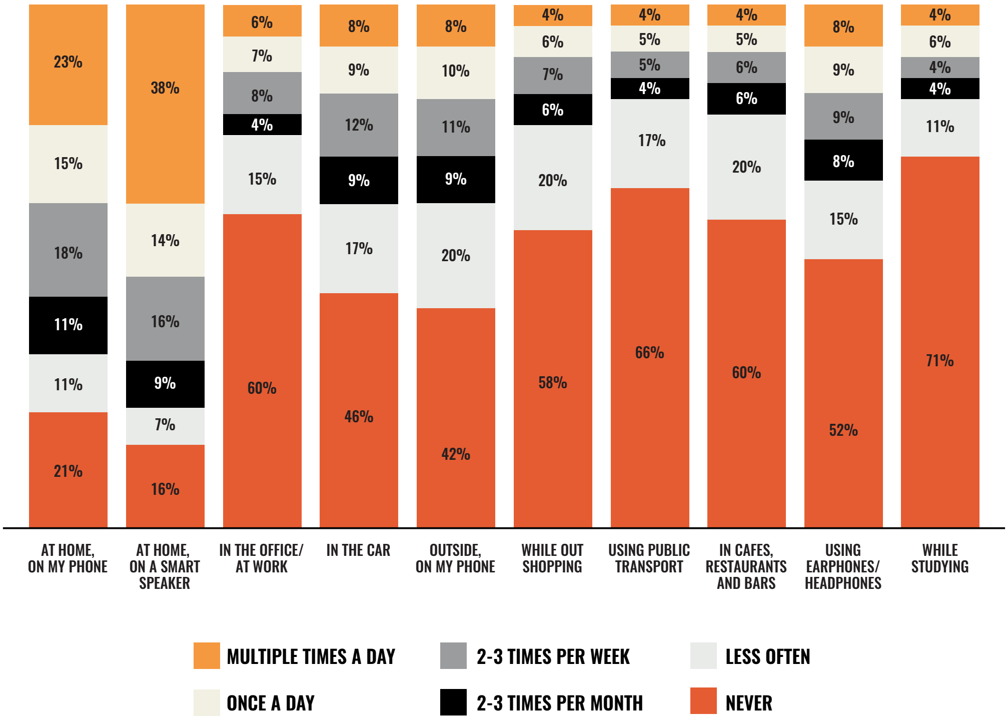
VOICE ASSISTANTS ARE PRIMARILY USED AT HOME* ON SMART SPEAKERS AND MOBILE DEVICES. THE US AND GERMANY HAVE HIGHER RATES OF VOICE ASSISTANT USAGE ON SMARTPHONES OUTSIDE THAN AUDIENCES IN THE UK.

VOICE ASSISTANT USAGE SCENARIOS – US

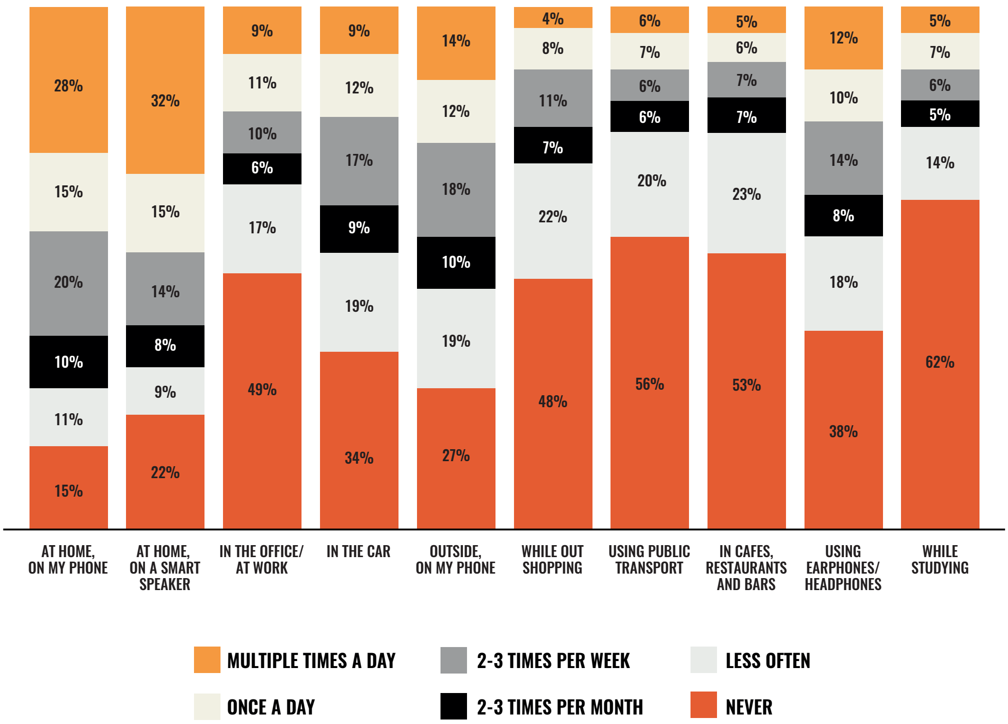


Note: *Due to the global pandemic, out of home usage was likely impacted. We would expect these numbers to increase as restrictions are eased.*

VOICE ASSISTANT USAGE SCENARIOS – UK



VOICE ASSISTANT USAGE SCENARIOS – GERMANY



“MOST VOICE USERS ARE USING IT IN MULTIPLE LOCATIONS: ON THEIR PHONE BOTH IN AND OUT OF THE HOME, ON SMART SPEAKERS IN THE HOME, AND ON THE WEB.”

Whether it’s on a smartphone or on a smart speaker, Voice assistant usage takes place primarily in the home and that usage can take place multiple times a day. It is suspected that the 2020 COVID-19 Pandemic had a significant impact on out-of-home usage data so it’s expected those numbers will shift as markets start to open up and restrictions are eased.

Overall, US users are most likely to use a Voice assistant while at home on their phone, with around a third doing so most days. This insight confirms that Voice on mobile doesn’t necessarily mean “on-the-go.” It could mean that at home, users are being considerate when there are others around and prefer a more private experience. In those instances, people wanting a more discreet experience are using their smartphone as opposed to shouting across the room to a smart speaker.

UK users are even less likely to use their assistant while out and about, preferring to restrict use to their home. Smart speakers in the home are the most regularly used, with over a third of users doing so most days.

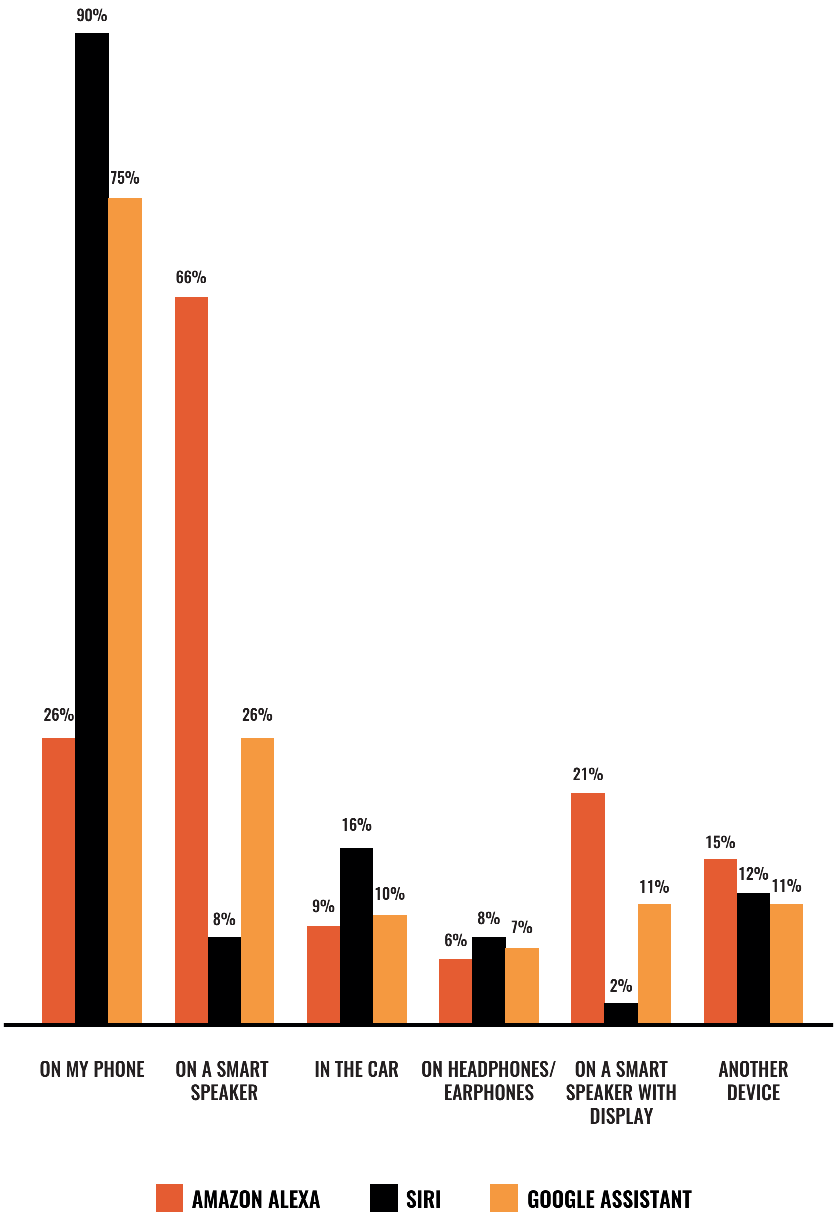
In Germany, users are slightly more open to using their tech outside the home than in the UK, although around a half say that they never use their assistant while at the office, shopping, eating out or on public transport.

FINDING EIGHT

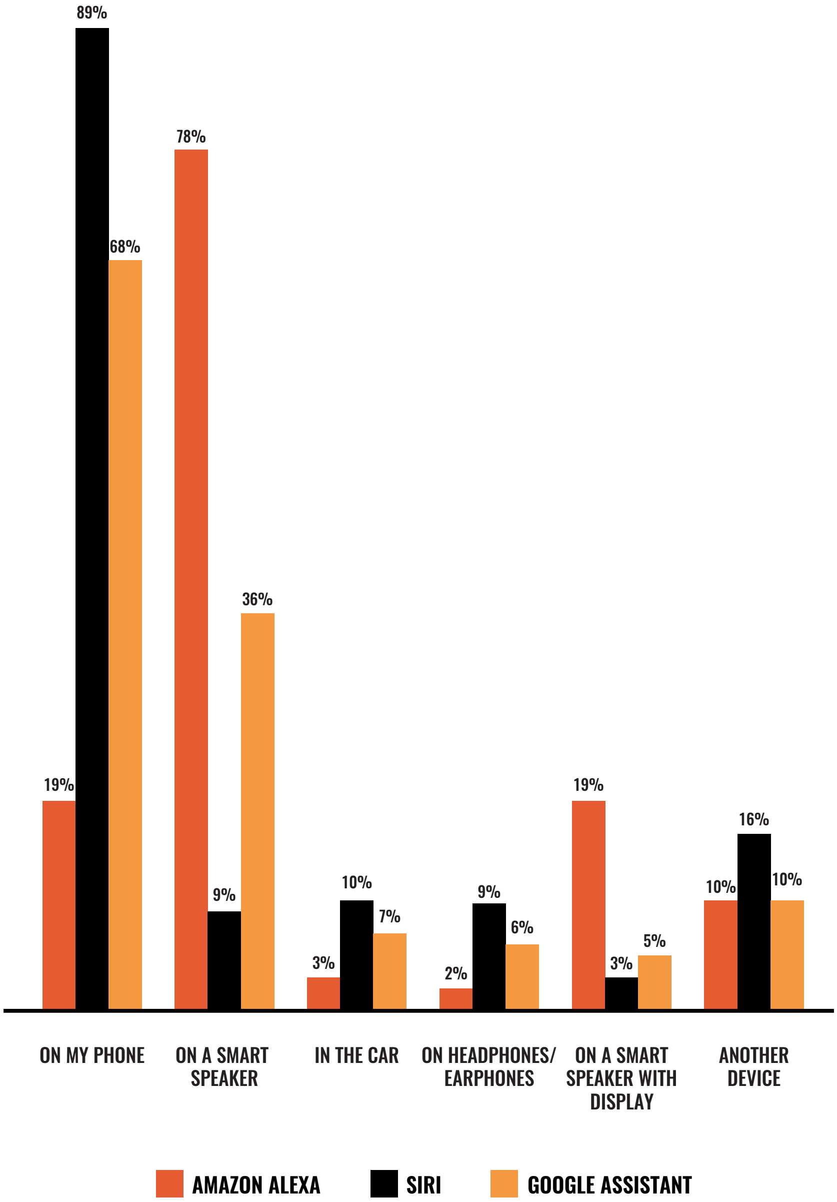
VOICE GOES BEYOND THE SMART SPEAKER

AMAZON ALEXA IS PRIMARILY USED ON SMART SPEAKERS WHILE SIRI IS USED MOSTLY ON SMARTPHONES. GOOGLE ASSISTANT HAS HIGH USAGE ON SMARTPHONES BUT ALSO HAS USAGE ON SMART SPEAKERS.

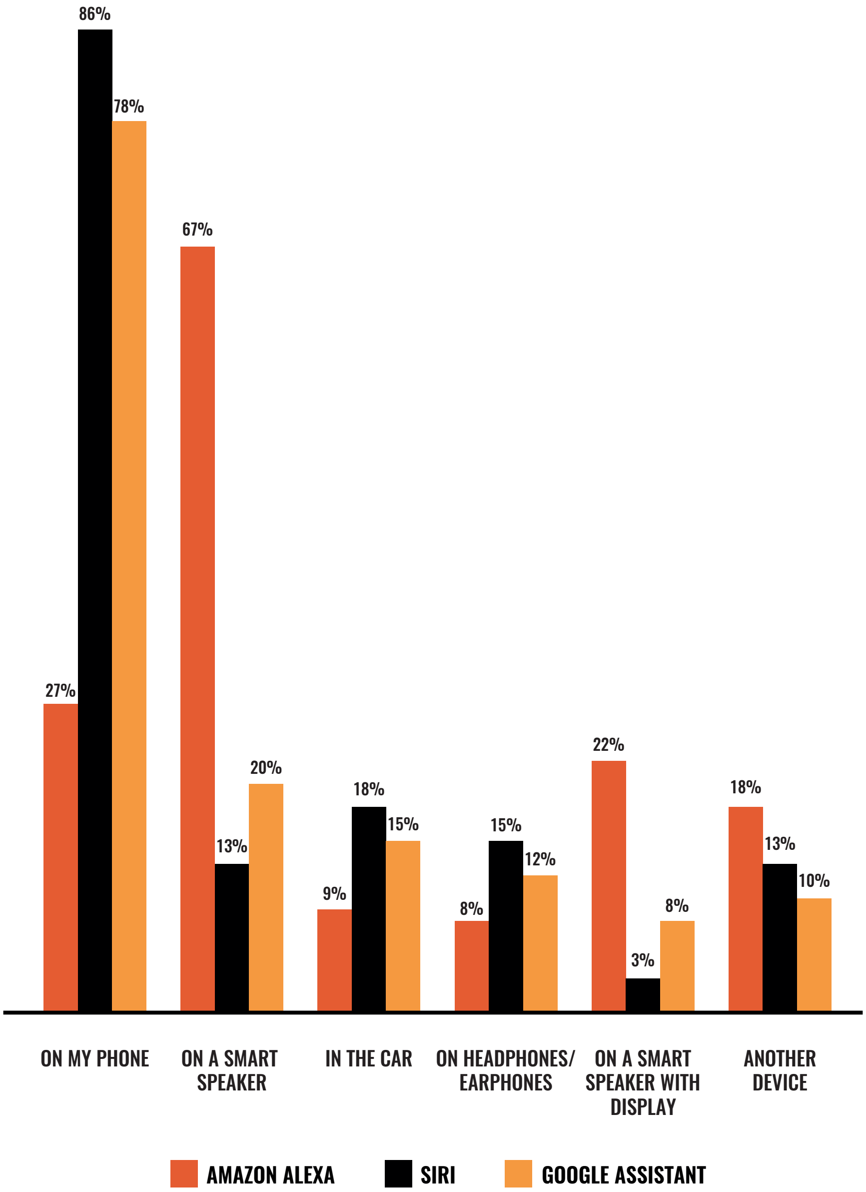
DEVICES USED WITH VOICE ASSISTANTS – US



DEVICES USED WITH VOICE ASSISTANTS – UK



DEVICES USED WITH VOICE ASSISTANTS – GERMANY



Daily usage is close to a third of users across all three markets. We also see that Amazon Alexa is used primarily on smart speakers while Google Assistant and Apple Siri are used more frequently on smartphones. The low use of Apple HomePod indicates that Siri is very much a mobile Voice assistant.

Smart speakers with displays, while indexing higher with Amazon Alexa users in the US and Germany, are much lower than smartphones and smart speakers so when considering multi-modal experiences, it more than likely will be happening on a smartphone.

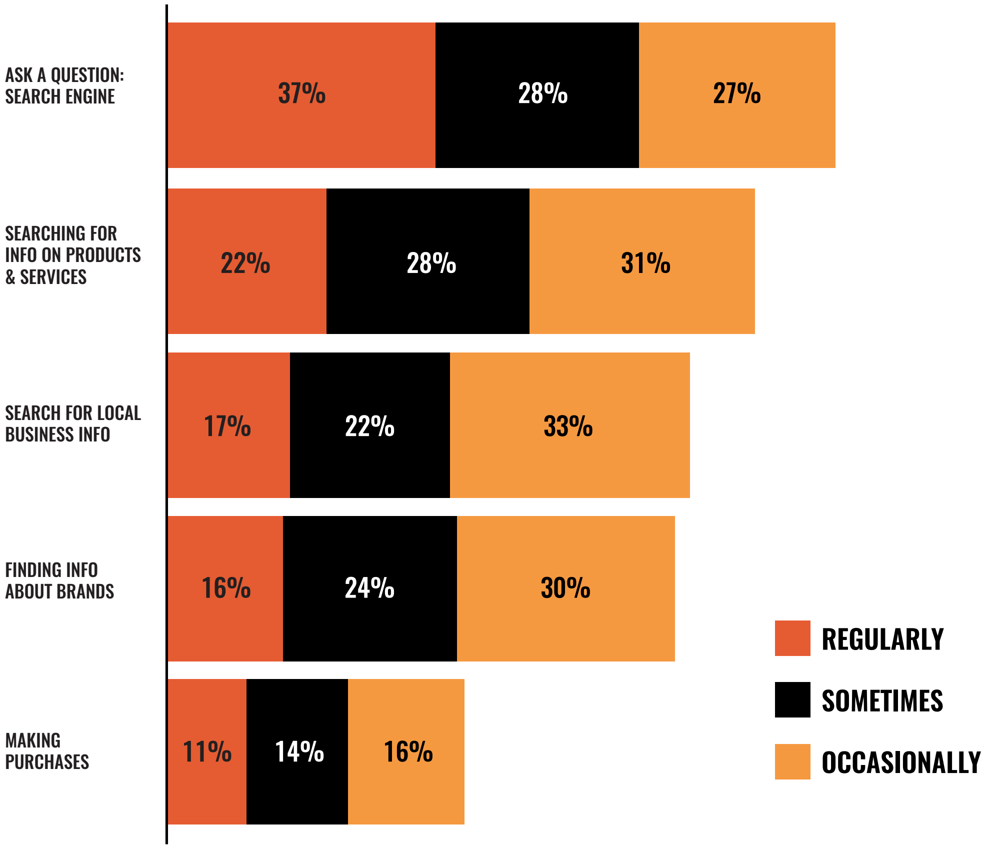
In seeing the dominance of the smartphone and smart speaker as Voice assistant devices, brands will want to make sure that their approaches account for not just smart speakers but smartphones as well.

FINDING EIGHT

VOICE ACTIVITIES ALIGN WITH THE MARKETING FUNNEL

VOICE CAN BE PART OF THE MARKETING ECOSYSTEM AND ENHANCE THE CUSTOMER JOURNEY.

REASONS FOR USING VOICE ASSISTANTS – US

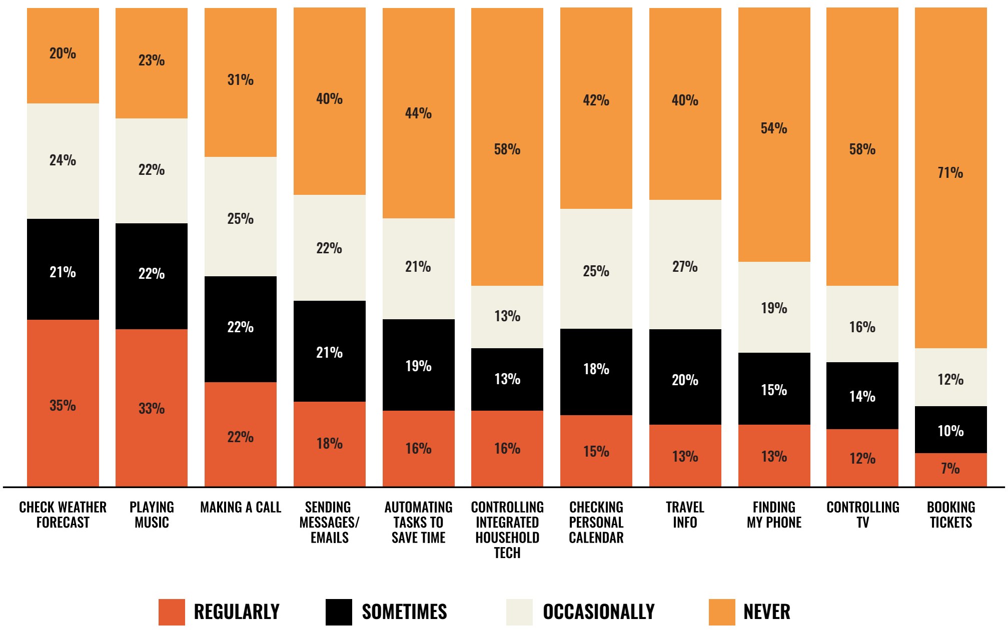


It's no surprise that music, news, and weather are where users start. It is surprising however that consumers have indicated that they're doing a lot more with their Voice assistants. Most frequently, these activities align with the tasks in a traditional marketing funnel. In the data, we see a clearly defined path to purchase as consumers move from awareness to consideration tasks then on to purchase and retention. At a macro level, this applies to all three countries with slight differences in the frequency of their activities.

“OVER 90% OF USERS HAVE USED A VOICE ASSISTANT TO FIND AN ANSWER TO A QUESTION VIA A SEARCH ENGINE.”

We see the search behaviors associated with awareness and then the more specific search tasks that are a part of consideration. At each phase, the volume reduces but that is normal for any funnel as some users will drop out during the journey. But we also see that across all three countries, 91% have done the top of funnel research behavior of asking a search engine a question. All of these activities indicate that a marketing funnel exists within Voice with or without support from specific brands. This is a big opportunity for brands in many industries to provide relevant content and to support their customers throughout the journey.

REASONS FOR USING VOICE ASSISTANTS – US



When we look at the other activities such as checking a personal calendar, playing music, and finding one’s phone, we see a distinct split where Voice can be a product or utility and where Voice is part of a customer experience.

FINDING NINE

VOICE SEARCH IS AN OPPORTUNITY FOR ALL INDUSTRIES

THE URGENCY TO STAKE BRAND AUTHORITY IS GREATER IN SOME INDUSTRIES THAN OTHERS.

LIKELIHOOD OF USING VOICE ACTIVATED SEARCHES BY SECTOR

	US	UK	GERMANY
WEATHER	71%	75%	74%
MUSIC	66%	72%	69%
NEWS	54%	67%	67%
ENTERTAINMENT	53%	49%	53%
RETAIL	44%	34%	42%
HEALTHCARE & WELLNESS	42%	39%	43%
FOOD DELIVERY & RESTAURANTS	39%	36%	40%
LOCAL SERVICES	36%	37%	39%
CONSUMER PACKAGED GOODS	36%	31%	43%
TRAVEL	34%	33%	35%
FITNESS	34%	34%	41%
MAKING A RESERVATION	33%	31%	38%
FASHION	31%	29%	40%
FINANCE	30%	29%	32%
OTHER	22%	21%	29%

As mentioned earlier, music, news, and weather are the most frequently searched for content that most people typically engage with when they first start using Voice assistants. Going beyond these initial uses of Voice, we see a useful prioritization of industries in which our respondents have indicated an interest.

Brands within Entertainment, Retail, Healthcare & Wellness, and Food Delivery & restaurants have a tremendous opportunity to better serve their audiences all along the marketing funnel.

Interestingly enough, even 31% of current users in the US and 40% in Germany indicated that they would search for fashion related topics using Voice. Considering how visual fashion tends to be, it's surprising that nearly one third indicated they would use their voice to look for fashion related topics.

SECTION THREE

ADDITIONAL WAYS AUDIENCES WANT TO INTERACT WITH THEIR VOICE

FINDING TEN

VOICE SEARCH SHOULD BE INTEGRATED INTO YOUR WEBSITE AND MOBILE APP

INTEREST IN VOICE GOES BEYOND THE SMART SPEAKER AND SMARTPHONE ASSISTANTS

SEARCH BEHAVIORS BY COUNTRY

	US	UK	GERMANY
TYPE INTO A SEARCH ENGINE ON A LAPTOP / DESKTOP COMPUTER	74%	77%	67%
LOOK DIRECTLY ON A RETAILER'S MOBILE APP OR WEBSITE	71%	73%	62%
LOOK DIRECTLY ON THE BRAND'S WEBSITE	69%	74%	63%
TYPE INTO A SEARCH ENGINE ON A SMARTPHONE	68%	71%	61%
USE MY VOICE TO CONDUCT A SEARCH ON A SMARTPHONE	37%	30%	37%
VISIT 3RD PARTY REVIEW WEBSITE	32%	33%	29%
USE MY VOICE TO CONDUCT A SEARCH ON A LAPTOP / DESKTOP COMPUTER	27%	23%	30%
ASK MY SMART SPEAKER FOR AN ANSWER TO A QUESTION	24%	25%	20%

VOICE SEARCH - NEXT STEPS

	US	UK	GERMANY
VISIT THE PRODUCT'S WEBSITE	82%	81%	77%
USE A MOBILE APP TO LEARN MORE ABOUT THE PRODUCT	63%	63%	62%
WATCH PRODUCT REVIEW VIDEOS ON YOUTUBE	62%	64%	64%
CONTINUE USING A VOICE EXPERIENCE TO LEARN MORE ABOUT THE PRODUCT	62%	60%	66%
SIGN UP FOR NOTIFICATIONS ABOUT A PRODUCT (E.G. BACK IN STOCK)	53%	55%	55%
LOOK ON SOCIAL MEDIA FOR OTHERS THAT USE THE PRODUCT	50%	51%	49%
SIGN UP FOR EMAILS / NEWSLETTERS FROM THE BRAND	46%	49%	48%

We know Voice search is important, but we didn't fully appreciate how important it is in the context of the overall marketing ecosystem until now. While a majority of people still are doing traditional search on their desktop or are tapping away on their smartphone, in the latest data we see a large percentage of people using Voice search on desktop, mobile, and on their smart speakers.

According to our research, 37% of people in the US conduct searches on their smartphone using their voice. 27% indicated they were likely to use Voice to search on their desktop or laptop and 24% are actually conducting a search with their smart speaker. This indicates that Voice is an important (and growing) opportunity for top of funnel activities. Where it gets really interesting is what happens next.

We wanted to see where Voice search users are likely to go to look for additional information after they conduct an initial search, an overwhelming majority in all three markets indicated a desire to continue their information seeking on a product's website (82% US, 77% Germany, and 81% UK). There's also a very high percentage of people that are interested in going to a brand's mobile app and even YouTube to learn more about the product.

"80% OF THOSE WHO USE VOICE TO START RESEARCHING A NEW PRODUCT OR SERVICE ONLINE WOULD VISIT A PRODUCT OR BRAND WEBSITE."

"BY INVESTING IN VOICE NOW, SMART BRANDS CAN BETTER SUPPORT THEIR AUDIENCES ESPECIALLY DURING THE AWARENESS AND CONSIDERATION PHASE OF THE CUSTOMER JOURNEY."

THOSE WHO START WITH VOICE HAVE A HIGH INTEREST IN STAYING WITH VOICE

Most surprising, once a user conducts a search with their Voice, a large percentage of these respondents (62% US, 60% UK, 66% Germany) indicated they want to be able to continue that experience to learn more about a product or service in Voice. By investing in Voice now, smart brands can better support their audiences especially during the awareness and consideration phase of the customer journey.

This underscores an opportunity for brands to take a more integrated approach when it comes to Voice whether it's a branded Google Action or Alexa Skill, adding Voice to an existing mobile app, or integrating Voice search into their website.

FINDING ELEVEN

THE PEOPLE HAVE SPOKEN, THEY WANT VOICE IN THEIR MOBILE APPS AND WEBSITES

VOICE IS MOST LIKELY TO BE USED TO SEARCH FOR ANSWERS IN EACH OF THE COUNTRIES, MAKING IT IMPERATIVE THAT BRANDS OPTIMIZE THEIR MOBILE APPS AND WEBSITES

LIKELIHOOD TO USE VOICE ON SMARTPHONE AND WEBSITES

SMARTPHONE	US	UK	GERMANY
SEARCH FOR ANSWERS TO A QUESTION I HAVE	75%	71%	71%
INTERACT WITH SOME OF THE APP FEATURES	57%	51%	56%
LOG INTO AN APP	56%	52%	51%
INPUT TEXT INSTEAD OF USING THE KEYBOARD	56%	51%	62%
USE A FEATURE WITHOUT OPENING THE APP	44%	37%	43%
NAVIGATE THROUGH THE APP USING MY VOICE	40%	40%	54%
INTERACT WITH A CHATBOT	36%	39%	40%

WEBSITE	US	UK	GERMANY
SEARCH FOR ANSWERS TO MY QUESTIONS ABOUT A PRODUCT OR SERVICE	69%	64%	60%
NAVIGATE A WEBSITE TO FIND THE INFORMATION I'M LOOKING FOR	60%	54%	60%
LOG INTO MY ACCOUNT	54%	49%	47%
FILTER A PRODUCT PAGE TO FIND EXACTLY WHAT I'M LOOKING FOR	52%	49%	57%
LEAVE A PRODUCT REVIEW	40%	39%	42%
FILL OUT FORMS (E.G CREATE A NEW ACCOUNT)	40%	39%	43%
INTERACT WITH A CHATBOT	37%	39%	41%

In addition to getting a better understanding of where Voice searchers are likely to go during the awareness and consideration phases, we wanted to uncover their interest in integrating Voice into more traditional marketing channels – specifically with websites and mobile apps.

VOICE ENHANCEMENTS ON A WEBSITE

By far the feature that had the most interest when it comes to Voice and websites is the ability to quickly and easily search for answers to questions. Make sure your brand is addressing these Frequently Asked Questions in both short snippets and long form content to ensure you're providing the information your audience needs. The key is that they are true, common questions your audience is asking.

People have also indicated strong interest in being able to filter through product options using their Voice (52% US, 49% UK, 57% Germany) and to log in using their Voice (54% US, 49% UK and 47% Germany).

> **"OVER TWO THIRDS (68%) OF VOICE USERS ARE INTERESTED IN HOW THE TECHNOLOGY WILL DEVELOP IN THE FUTURE."**

VOICE ENHANCEMENTS WITHIN A MOBILE APP

There is a very high interest around being able to search for common questions either on a website or in a mobile app. In the US 75% of people want to use their voice to ask a question of their smartphone within an app for common questions and to get their answers. The perception is it would make it easier for them to find the information they're looking for without digging through the app, using the navigation, or fumbling around with controls. They just want quick answers to their common questions.

“PEOPLE WANT TO BE ABLE TO QUICKLY FIND THE INFORMATION THEY’RE LOOKING FOR AND NOT HAVE DEEP CONVERSATIONS WITH BRANDS… YET.”

When thinking about how brands can use Voice, there is a tendency to want to jump into the deep end and build a full-blown conversational agent that users can talk to. The data suggests that this approach is a bit premature with low interest in Voice based chatbots within mobile apps or on a website. What does this mean? People want to be able to quickly find the information they’re looking for and not have deep conversations with brands… yet. This interest will likely increase over time but it’s important to understand where the consumer mindset and tolerances are so we can build the right experiences for now and enhance them in the future.

SECTION FOUR

WHAT DOES THIS MEAN FOR BRANDS AND MARKETERS?

KEY FINDINGS

31% OF PEOPLE USER VOICE ASSISTANTS DAILY WITH ALMOST HALF USING THEM AT LEAST ONCE A WEEK

This is becoming part of all consumers' habits and will soon become routine.

ACROSS ALL MARKETS WE SURVEYED, WE FOUND A VERY SIMILAR USAGE PATTERN – ALMOST 60% OF PEOPLE ARE VOICE ASSISTANT USERS

This is a global phenomenon – it's no longer led by one market.

ASIDE FROM CONTROLLING MUSIC AND GETTING THE WEATHER, THE MOST USAGE IS IN ASKING QUESTIONS VIA A SEARCH ENGINE – OVER 90% HAVE DONE THIS IN ALL MARKETS

Voice is the next phase of search, SEO and soon SEM – and a new platform for streamlined, habit driven applications.

OVERALL, CURRENT VOICE CONSUMERS ARE USING VOICE TO SEARCH FOR PRODUCT AND SERVICE INFORMATION (80%), INFORMATION ABOUT LOCAL BUSINESSES (70%) AND BRAND INFORMATION (70%)

If you have a brand with products, locations or content – unless you optimize it, consumers won't find you via Voice.

MOST VOICE USERS ACCESS THE TECHNOLOGY IN MULTIPLE LOCATIONS (ON SMART SPEAKERS, ON THE WEB, AND ON THEIR PHONE IN AND OUT OF THE HOME)

Voice is going to affect your digital ecosystem – this isn't just about putting your existing app or content on a smart speaker.

80% OF THOSE THAT USE VOICE TO START RESEARCHING A NEW PRODUCT OR SERVICE ONLINE WOULD VISIT A PRODUCT OR BRAND WEBSITE

You need to be thinking about how a Voice consumer is going to find you through Voice but then connect with you via the web.

OVER TWO THIRDS (68%) OF VOICE USERS ARE INTERESTED IN HOW THE TECHNOLOGY WILL DEVELOP IN THE FUTURE

Voice isn't going anywhere. It's time to get ready.

Smart marketers and brands can take advantage of Voice as a new channel where they can reach their audiences and meet their needs. But in order to be successful they must address the customer's information needs at all phases of the journey.

It's very clear how businesses can move forwards with Voice. It's important to also realize this is not a sprint. And while the time to start is now, you should not try to build everything all at once. Instead, develop a strategy and roadmap that will provide flexibility and priorities as you learn about your specific audience's behaviors and optimize based on that knowledge.

THE VOICE MATURITY MODEL

We have developed a Voice Maturity Model to help organizations identify and understand where they are in their efforts to incorporate Voice into their marketing funnel. As a brand or organization develops and implements its Voice strategy, there are three distinct phases:

1

OPTIMIZATION

This is where a brand can start to address Voice with their existing content and digital properties. It includes optimizing content for Voice search and voice-enabling websites and mobile apps so that they are Voice-ready. It can also mean repurposing existing audio content for microcasting or other uses.

2

CREATION

The brand begins to develop its sonic brand identity for use across multiple marketing channels, including interactive audio advertising. This could also mean the creation of in-store or on-premise Voice activated experiences. There may even be some exploration in the creation of a branded Voice assistant.

3

INTEGRATION

When a brand reaches full maturity, there is a seamless integration of Voice into its entire marketing ecosystem. There will be a robust Voice strategy that includes search, branding, and activation across all channels to create a consistent brand experience that audiences can control and engage with using their voice regardless of the device and their phase in the customer journey.

GET IN TOUCH

For a deeper view of the research so you can add Voice to your brand's marketing funnel, please contact us for a consultation.

Email info@vixenlabs.co

ABOUT THIS REPORT

The research firm Delineate conducted the Voice Consumer Index research from 14th - 19th May, 2021, releasing the report in June 2021. This Voice Consumer Index research study was conducted by Delineate in May 2021 in the UK, US and Germany.

In total 6,000 individuals aged 18+ were surveyed (2,000 in each country). The samples in each country were controlled with representative quotas among each age group, region and ethnicity in the US. The completed samples were weight to be representative of the national populations according to published statistics for each country.

The margin of error for the total sample in each country is ±2.2%. All survey participants were recruited via consumer panels and then invited to complete the online survey by mobile or computer. This research and report is possible through Vixen Labs in partnership with the Open Voice Network presented by Google Assistant.

This report was analyzed and authored by Susan and Scot Westwater, who are the co-founders of Pragmatic Digital, the Voice marketing advisor for the world's most innovative brands, and co-authors of the book Voice Strategy: *Creating Useful and Usable Voice Experiences* which was #1 Release on Amazon and are working on a second book titled *Voice Marketing* which will be released in Spring 2022. They are Ambassadors for the Open Voice Network and instructors for the Marketing AI Institute's AI Academy. They both were recognized in Voicebot's Top 68 Leaders in Voice 2020 and Scot was recently included in Sound Hound's "Top 40 Voice AI Influencers to Follow on Twitter".

CREATED BY	RESEARCH CONDUCTED BY	IN PARTNERSHIP WITH
VIXEN LABS	delineate	OPEN VOICE NETWORK

CHART REFERENCE DATA

Voice Assistant Frequency of Use

ET6_A: Generally, how often do you use voice assistants? Nat Rep each country (n=2000)

Awareness of Voice Activated Technology

ET3: Which of the following best describes how familiar you are with voice activated technology? Nat Rep each country (n=2000)

Barriers to Using Voice Activated Technology

ET10: Which, if any, of the following describe your reasons for not using a voice assistant?
Base sizes: Non-users US: (n=857), UK (n=822), DE (n=969)

Voice Assistant Usage Scenarios - US

ET7: Thinking about how you currently use voice assistants… Which, if any, of the following do you use voice assistants for? Current Users (n=1,143)

Voice Assistant Usage Scenarios - UK

ET7: Thinking about how you currently use voice assistants… Which, if any, of the following do you use voice assistants for? Current Users (n=1,178)

Voice Assistant Usage Scenarios - Germany

ET7: Thinking about how you currently use voice assistants… Which, if any, of the following do you use voice assistants for? Current Users (n=1,031)

Devices Used with Voice Assistants - US

ET5_A: On what devices do you usually use these assistants? Current Users:
Base sizes: Alexa user base n= 557 Siri user base: n= 555 Google assistant user base n=478

Devices Used with Voice Assistants - UK

ET5_A: On what devices do you usually use these assistants?
UK Base sizes: Alexa user base n= 768 Siri user base: n= 450 Google assistant user base n=413

Devices Used with Voice Assistants - Germany

ET5_A: On what devices do you usually use these assistants?
DE Base sizes: Alexa user base n= 595 Siri user base: n= 319 Google assistant user base n=438

Reasons for Using Voice Assistants

ET7: Thinking about how you currently use voice assistants… Which, if any, of the following do you use voice assistants for? US = Current Users (n=1,143) UK = Current Users (n=1,178) Germany = Current Users (n=1,031)

Likelihood of Using Voice Activated Searches by Sector

ET8: Currently, how likely are you to use voice activated searches for the following types of products and services? T2B (Quite likely + Very Likely) Base sizes: Current users US (n=1,143), UK (n=1,178), DE (n=1,031)

Search Behaviors by Country

ETN2A: Thinking generally about when you start to research a new product or service online, how likely are you to do the following? Base: Nat Rep: n=2,000
ETN2B: You said that you may be likely to use your voice assistant to search for something online. Once you have heard or seen the result of your voice search, you may choose to take a next step. Thinking about possible next steps, how likely or unlikely are you to do the following? Base: Those likely to use voice to search at ETN2A US (n=947), UK (n=832), DE (n=946)

Likelihood to Use Voice on Smartphone and Websites

ETN3: We'd now like you to think about the mobile apps you use on your smartphone. How likely or unlikely are you to consider using your voice to do each of the following? Base: Smartphone users: US (n=1,103), UK (n=1,145), DE (n=1,003)
ETN4: We'd now like you to think about how you use websites in general. How likely or unlikely are you to consider using your voice to do each of the following? Base: Current Voice Users US (n=1,143), UK (n=1,178), DE (n=1,031)

ABOUT VIXEN LABS

Vixen Labs is Europe's leading full service Voice agency. We work with Fortune and FTSE 500 brands to develop Voice and conversational strategies, products and services to drive business value and connect with audiences in the most intuitive way possible. Our full-service offering covers strategy development, Voice search optimization, Voice app builds, audio content, and marketing.