



VOICE CONSUMER INDEX 2021

UNDERSTANDING HOW PEOPLE USE VOICE TO INFORM YOUR
BRAND'S VOICE STRATEGY FOR 2022 AND BEYOND.

IN PARTNERSHIP WITH



OPEN VOICE
NETWORK

INTRODUCING THE VOICE CONSUMER INDEX 2021

Users across demographics search for specific brands by voice – *and* make purchases. That was our key finding from last year's Vixen Labs Voice Commerce Report. Hundreds of business leaders took this message onboard and made moves towards a voice strategy (or improved their existing approach). This year we team up with the Open Voice Network and our previous research partners Delineate to uncover the latest Voice consumer insights across even more sectors, from Banking to Healthcare. We analyse behaviour and usage in the UK, US and Germany.

All VCI content is free to access, no matter who you are or where you work. This Executive Summary shares some of the main headlines to give you a snapshot. Download the white paper to read the full analysis of our results and their actionable insights. Dive deeper into each sector with our podcast, and ask the team your questions at our webinars. Our social media platforms have all the latest updates about the VCI, as well as behind-the-scenes content.

It's simple: similar to web and mobile, voice is evolving from an interface into a distinct consumer channel. Some brands are already benefiting from first-mover advantage. Others will drag their feet skeptically. You get to choose where your business sits on that spectrum.

JAMES POULTER CEO & CO-FOUNDER, VIXEN LABS



BEHIND THE VOICE CONSUMER INDEX



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 optimisation, voice app builds, audio content, and marketing.



The Open Voice Network (OVN) is an open source association of the Linux Foundation, dedicated to advancing open standards that support the adoption of AI-enabled voice assistance systems.



Global insights and research agency. Delineate is a modern research company driven by the smartest people and powered by a smart technology platform.

This combination delivers real-time data, insight and intelligence to help brands and marketers make smarter decisions.



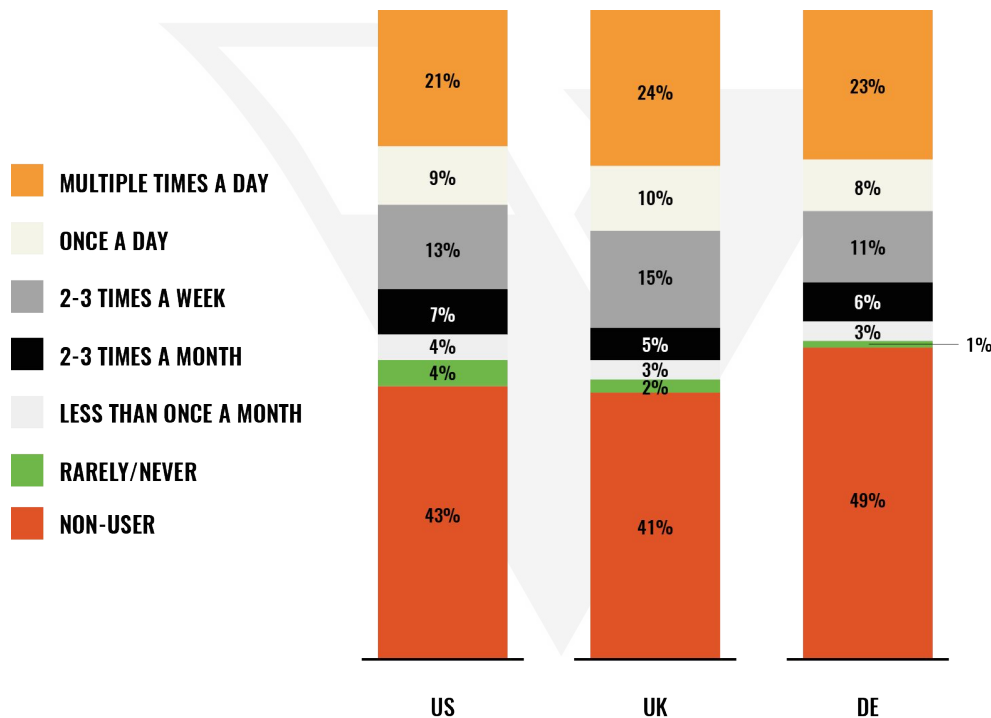
“...VOICE WILL SOON BE A PRIMARY WAY CONSUMERS CONNECT WITH THE DIGITAL WORLD, AND A PRIMARY WAY THAT DIGITAL MARKETERS WILL CONNECT WITH CONSUMERS...”

JON STINE EXECUTIVE DIRECTOR, OPEN VOICE NETWORK



SECTION ONE

THE AUDIENCES AND THEIR ATTITUDES TOWARDS VOICE



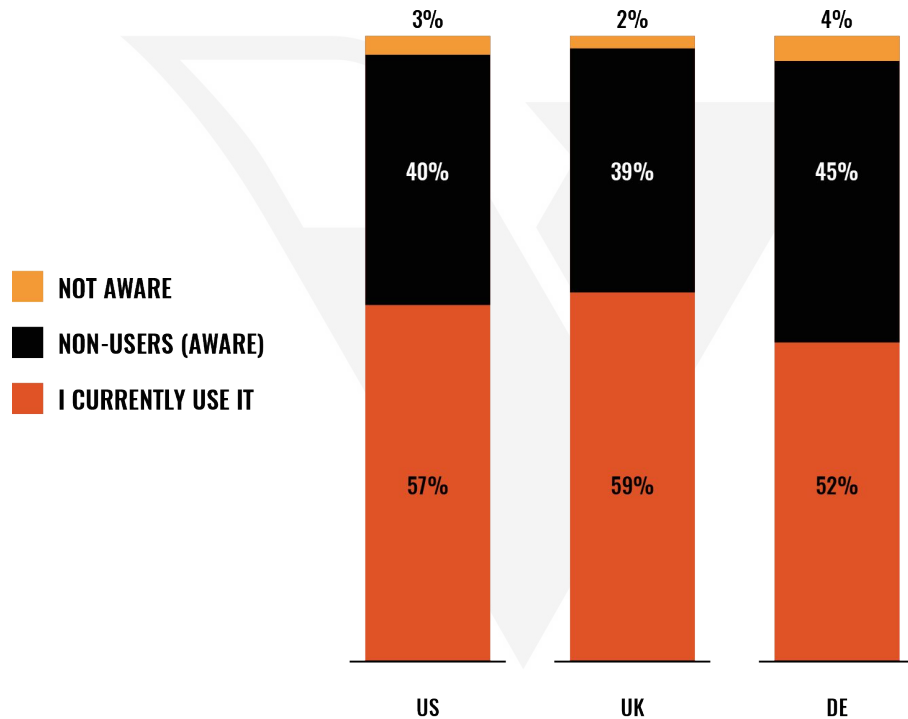
Voice Assistant Frequency of Use
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 Research conducted by Delineate in May 2021

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.





Awareness of Voice Activated Technology
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Research conducted by Delineate in May 2021

FINDING TWO

THERE IS SIGNIFICANT AWARENESS AND USE ACROSS ALL THREE REGIONS

Most people use at least one Voice assistant.



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%

Main Voice Assistant Used by Age Group and Country

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Research conducted by Delineate in May 2021

FINDING THREE

VOICE ASSISTANT USAGE IS SPREAD ACROSS ALL AGE GROUPS

The opportunity is not just for brands with younger audiences.



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%

Main Voice Assistant Used by Age Group and Country

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Research conducted by Delineate in May 2021



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%

Main Voice Assistant Used by Age Group and Country

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	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%

User Attitudes towards Voice Assistants

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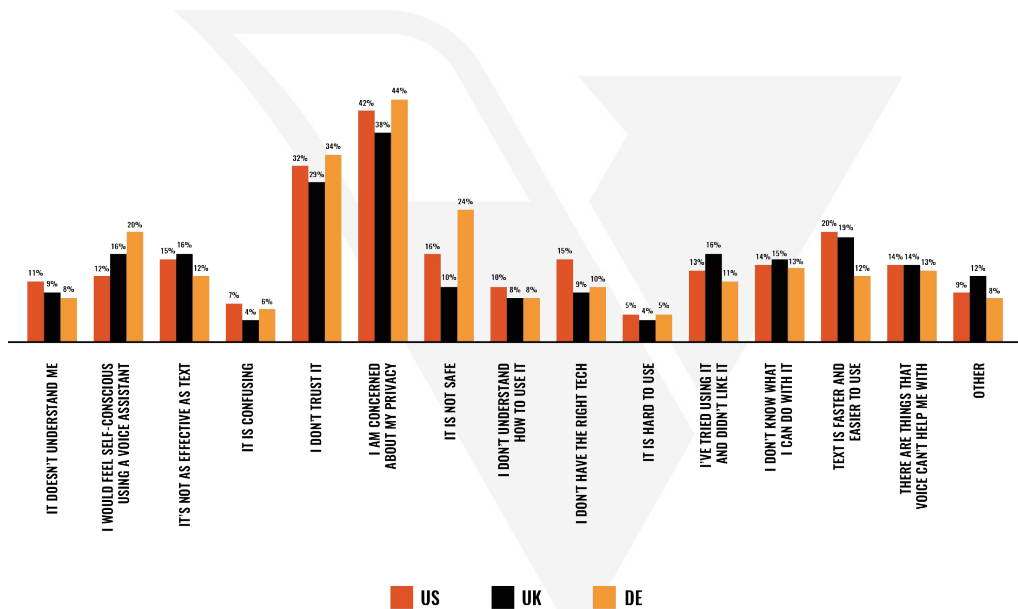
Research conducted by Delineate in May 2021

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.





Barriers to Using Voice Activated Technology

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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.



	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%

Ways Users Learn to Use Voice Assistants

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Research conducted by Delineate in May 2021

FINDING SIX

USERS SEE THE VALUE OF VOICE BUT NEED MORE SUPPORT FROM BRANDS TO LEARN ALL THAT IT CAN DO FOR THEM

Most users are relying on trial and error to find the experiences they want.



57% OF PEOPLE – IN THE US, UK, AND
GERMAN MARKETS – ARE VOICE
ASSISTANT USERS



SECTION TWO

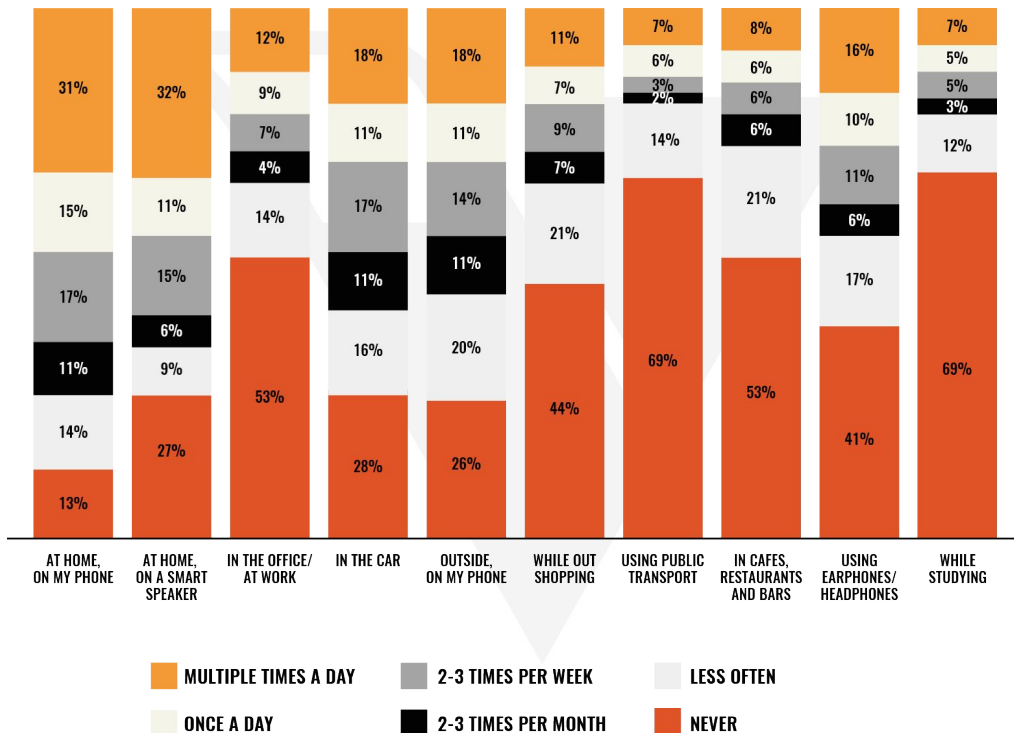
THE WAYS AUDIENCES ARE USING VOICE

US

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.



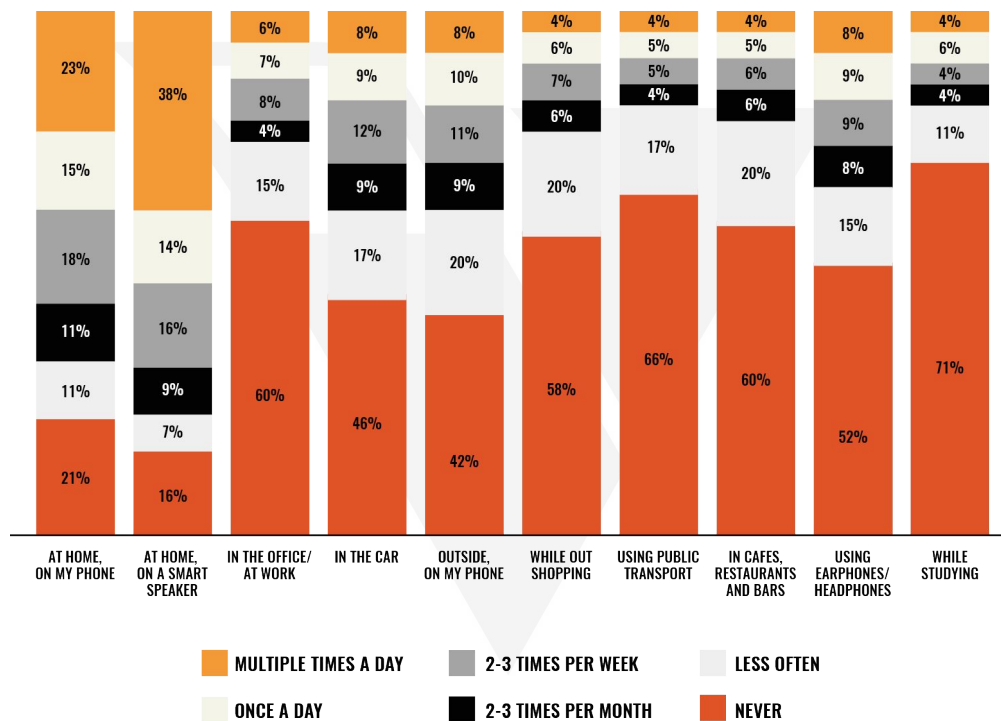
Voice Assistant Usage Scenarios – US

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FOR MORE DETAIL, DOWNLOAD THE WHITE PAPER AT [VIXENLABS.CO](https://vixenlabs.co)

UK



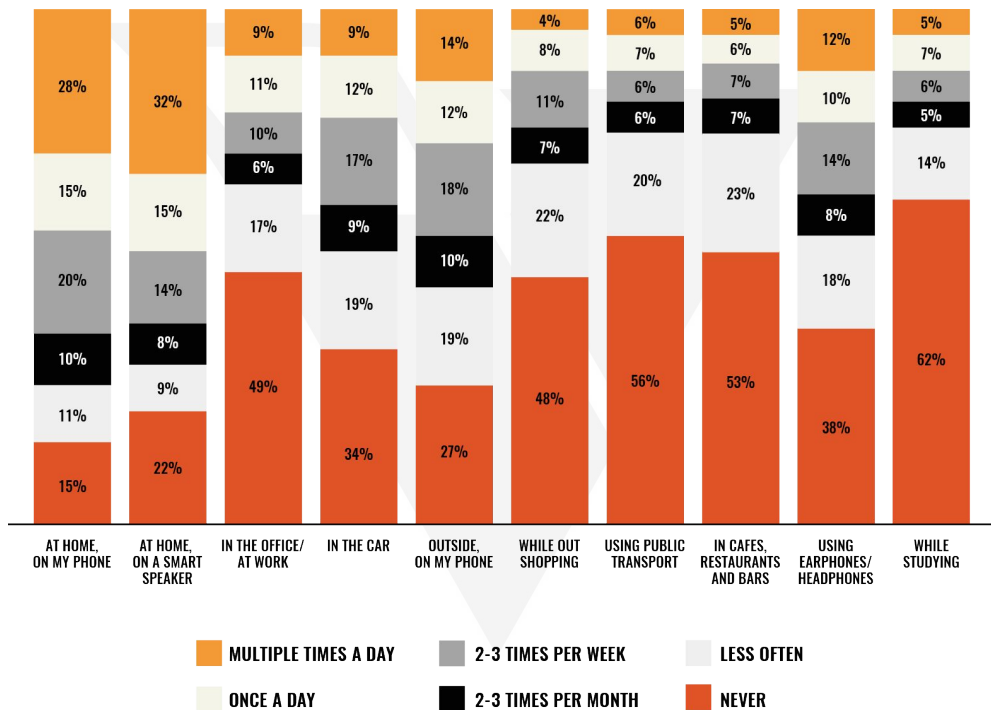
Voice Assistant Usage Scenarios – UK

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GERMANY



Voice Assistant Usage Scenarios – Germany

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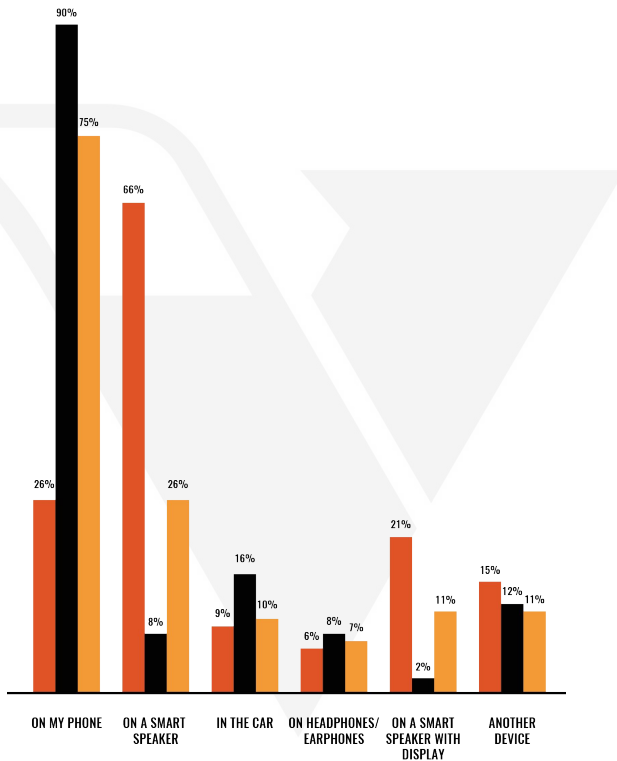


US

FINDING EIGHT

VOICE GOES BEYOND
THE SMART SPEAKER

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.



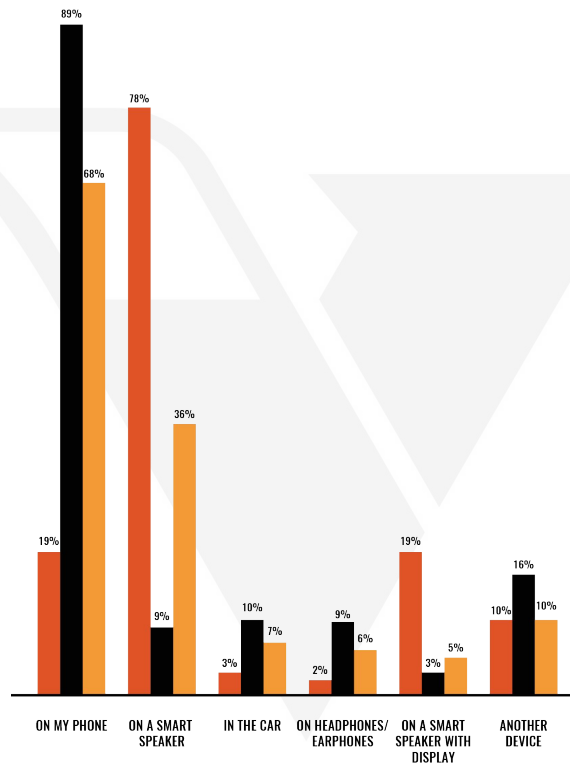
Devices Used with Voice Assistants – US

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UK



Devices Used with Voice Assistants – UK

AMAZON ALEXA

SIRI

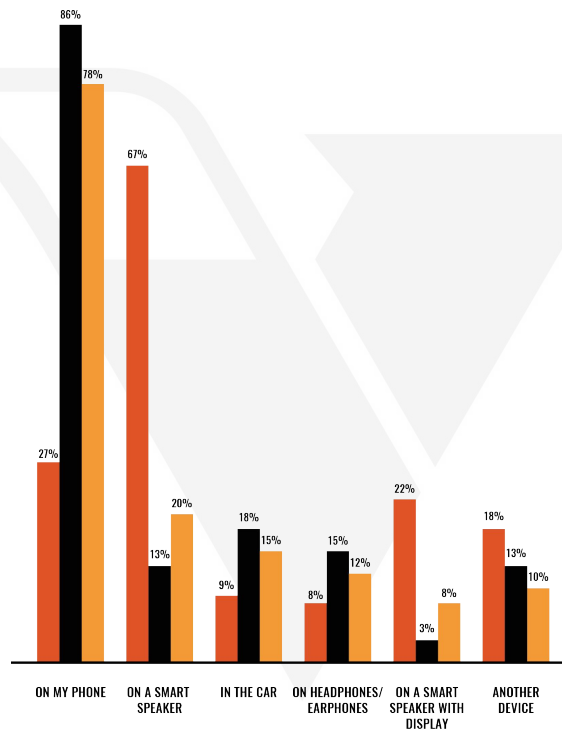
GOOGLE ASSISTANT

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GERMANY



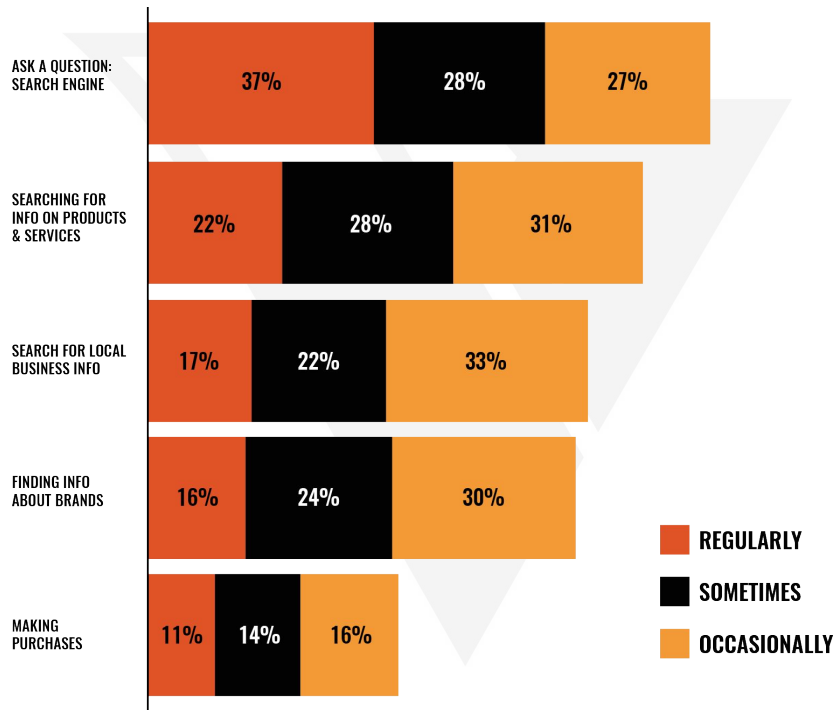
Devices Used with Voice Assistants – Germany

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Research conducted by Delineate in May 2021



US



Reasons for Using Voice Assistants – US

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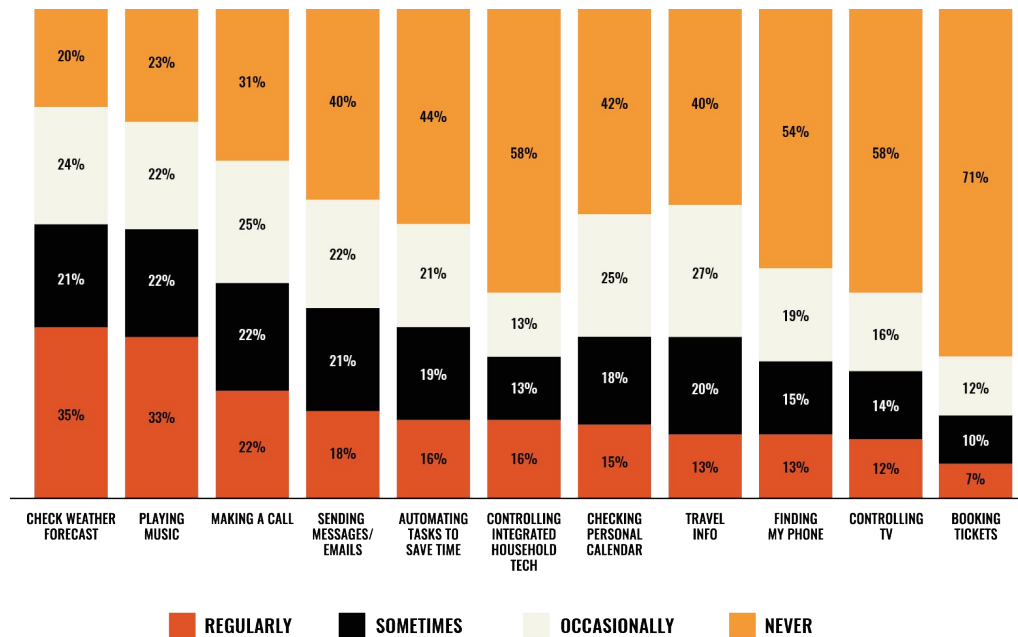
FINDING NINE

VOICE ACTIVITIES ALIGN WITH THE MARKETING FUNNEL

Voice can be part of the marketing ecosystem and enhance the customer journey.



US



Reasons for Using Voice Assistants – US

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	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%

Likelihood of Using Voice Activated Searches by Sector

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Research conducted by Delineate in May 2021

FINDING TEN

VOICE SEARCH IS AN OPPORTUNITY FOR ALL INDUSTRIES

However, the urgency to stake brand authority is greater in some industries than others.



91% **OF VOICE CONSUMERS ARE ALREADY
SEARCHING VIA VOICE**





DOWNLOAD TODAY

GET THE WHITE PAPER FOR SECTION THREE, SECTION FOUR, AND MORE

Head to vixenlabs.co/VCI2021 to get the white paper. It includes detail on the findings you've had a glimpse at here, plus insight into **additional ways audiences want to interact with their voice** and the answer to: **what does this mean for brands and marketers?**

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 – US

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

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