

# VOICE CONSUMER INDEX 2022

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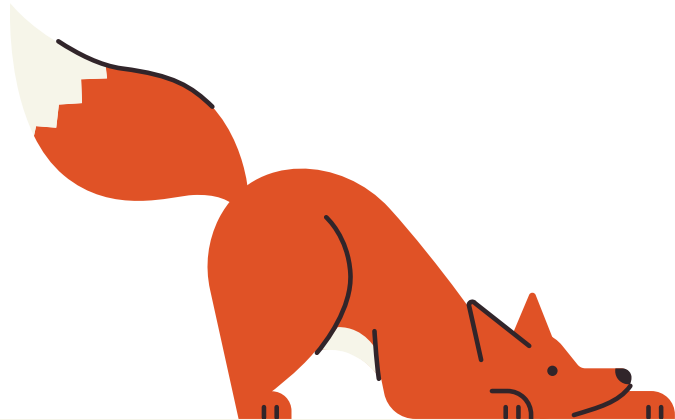


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# INTRODUCING THE VOICE CONSUMER INDEX 2022



## A LETTER FROM JAMES POULTER

There comes a time in every big technology cycle when we see a tipping point – that moment when it goes from a novelty to a go-to tool.

As the team and I dove into the Voice Consumer Index data for 2022, we saw that tipping point. Voice assistants and the assistance they provide have been in our lives in one way or another for more than a decade now. We are turning to them without thinking about it, just to get things done.

We see growth across all devices, platforms, and use cases, fuelled by increased consumer awareness and an understanding of what their voice assistants can do for them.

As the world unlocks, people are turning more than ever to conversational technology to navigate their hybrid lives and businesses. We see more acceptance, a rising trust, and a decrease in fears around privacy and security.

The innovation cycle is shifting towards Web 3.0, the metaverse and NFTs, and conversational AI will play a significant role in these environments of the future. Voice 3.0 will power our augmented reality experiences, while avatars and voice cloning will be the operating system of our virtual presence. The blockchain heralds new opportunities for conversational biometrics with potential for storing sensitive data in a decentralised way.

As you explore the insights in this year's report, I hope you are encouraged, excited, and inspired by the data and what it means for all of us who are seeking a more human experience of technology.

It's time to put Voice to work.



**JAMES 'JP' POULTER**  
CEO & CO-FOUNDER, VIXEN LABS



## INTRODUCTION

# BEHIND THE VOICE CONSUMER INDEX

## METHODOLOGY

We conducted the Voice Consumer Index 2022 in partnership with Delineate. Working with an independent research firm ensures we deliver high-quality, transparent data that we at Vixen Labs and the Open Voice Network (OVON) value so much. In total, 6,000 individuals aged 18+ were surveyed (2,000 in each of the UK, US, and Germany) in May 2022. The research samples were selected and analysed based on published national statistics, so as to accurately represent each country's population. The margin of error for the total sample in each country is  $\pm 2.2\%$ . All survey participants had been recruited via consumer panels and then invited to complete the online survey by mobile or computer.

## VIXEN LABS

[VIXENLABS.CO](https://vixenlabs.co)

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.

## OPEN VOICE NETWORK

[OPENVOICENETWORK.ORG](https://openvoicenet.org)

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

## VERITONE

[VERITONE.COM](https://veritone.com)

Veritone Inc. is a leader in enterprise AI software, services, and applications, helping companies transform their operations and solve the complexities of digital information today. With our AI solutions and rich partner ecosystem, our customers can address their current and future challenges, empowering them to run more efficiently, accelerate decision making, and gain a competitive edge.

## SEC NEWGATE

[SECNEWGATE.CO.UK](https://secnewgate.co.uk)

SEC Newgate is an insights and research-driven global strategic communications and advocacy group working at the nexus of business, politics, communities, markets, and media to deliver positive outcomes. Stakeholder and audience behaviour is at the heart of their approach, delivered by 850 professionals from 43 offices in 15 countries, across five continents.



“ From the Voice Consumer Index 2022, it’s very clear what consumers want from voice technology: fast, accurate, efficient access to information that makes life better, faster, and less expensive. With the daily use of voice assistants rising again in the past 12 months, it’s increasingly clear that business will continue to migrate towards those firms who can speak with their customers. This is an industry roadmap to sustainable value creation. ”



**JON STINE**  
EXECUTIVE DIRECTOR, OPEN VOICE NETWORK

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## SECTION ONE

# OVERALL USAGE

We've long known that conversational assistants come in handy most when we are busy. When our hands are full – carrying shopping bags perhaps, or driving – reaching for a phone or computer isn't convenient or safe.

The pandemic changed how we handled everyday things. We became increasingly familiar (reliant, even) on our smart speakers, phones and headphones to tick tasks off our lists.

Now that the world is opening up, we've taken some of our new habits with us. Connected to a plethora of new devices (from game consoles and TVs to wireless headphones free-floating in our pockets) we simply have voice assistants with us wherever we go.

Our attitude towards Voice has shifted from a plaything to a helpful assistant throughout the day.

More people than ever before are using Voice daily and weekly, showing a shift from the novelty and casual usage of the early days to a much more ingrained and habitual pattern – akin to pulling out our phone at the buzz of a notification. People are now finding themselves using their voice on a wider range of devices, and expect that usage to increase in years to come.

What was once a tool seen as a replacement for the remote or light switch has become a constant companion throughout the day – at home, in the office, and on the move.

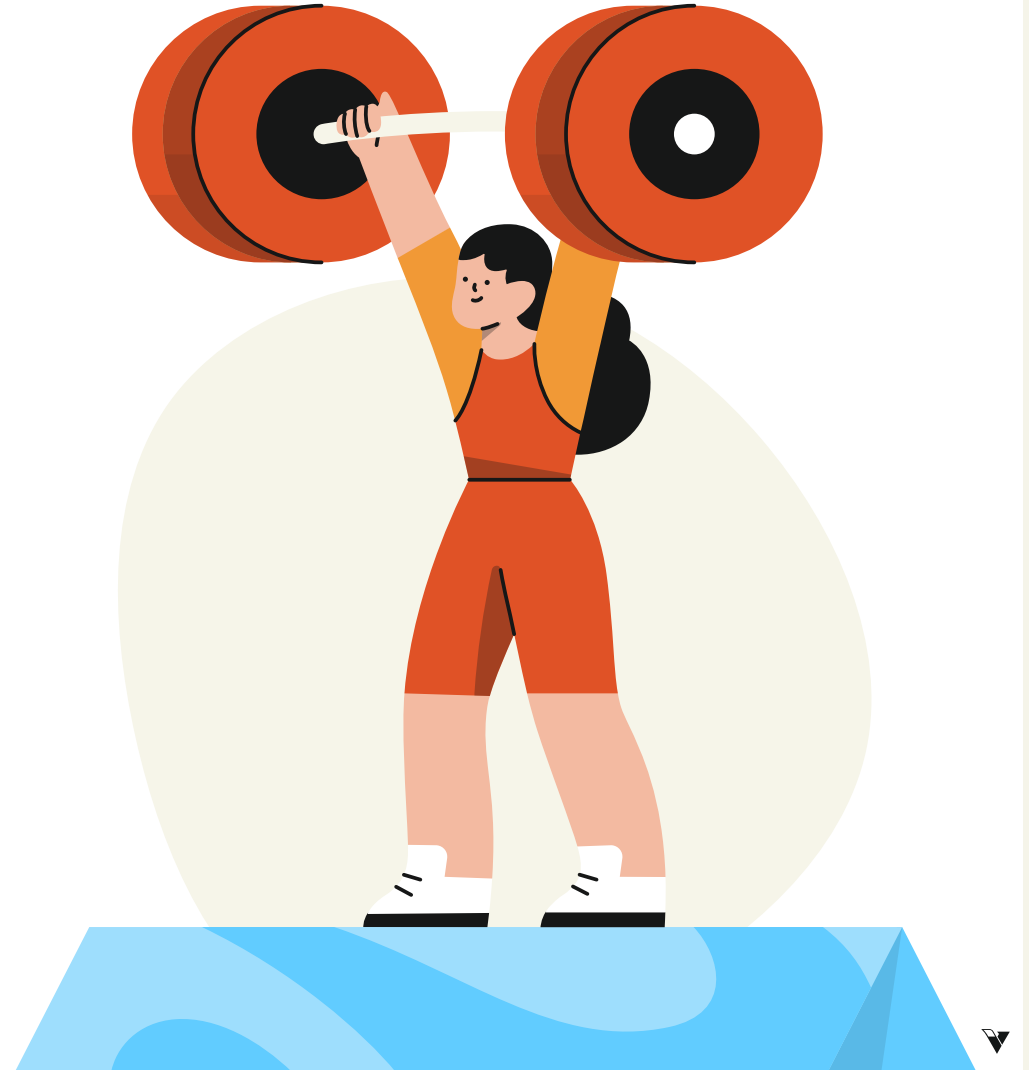
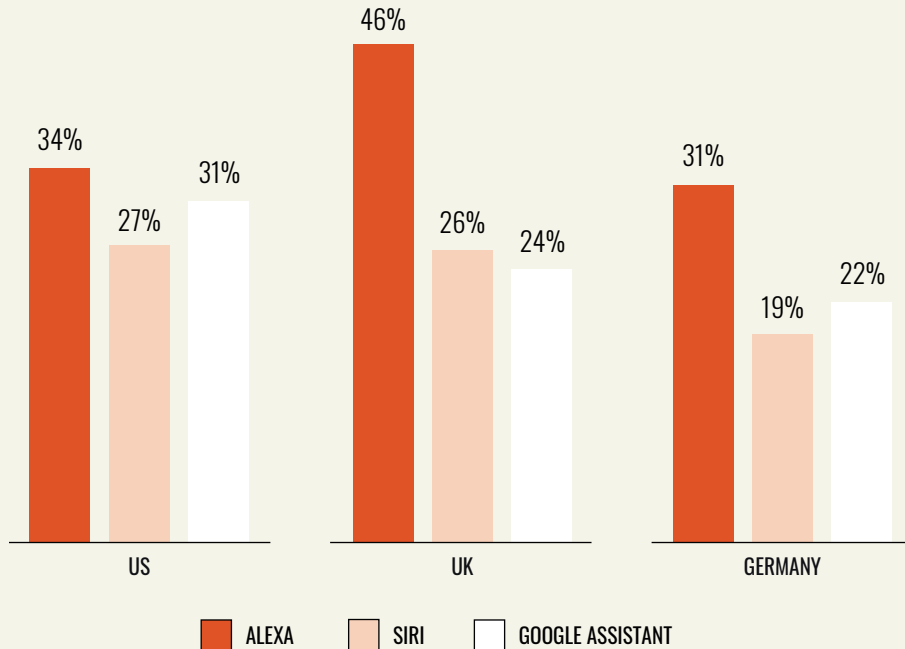


## POPULARITY OF THE BIG THREE: ALEXA, SIRI, AND GOOGLE ASSISTANT

HOW MANY PEOPLE ARE USING VOICE ASSISTANTS TODAY?

**CURRENT VOICE ASSISTANT USAGE HAS INCREASED IN ALL THREE MARKETS, BUT MORE SIGNIFICANTLY IN THE UK AND US.**

Usage in Germany is still more than half, having increased to 54% in 2022.

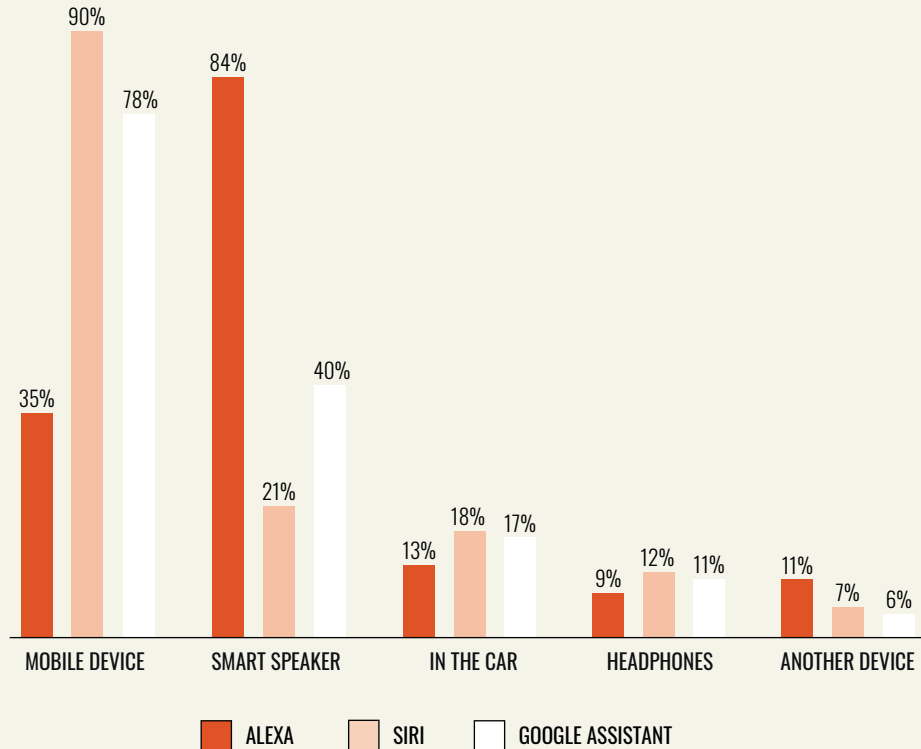


## IN THE US...

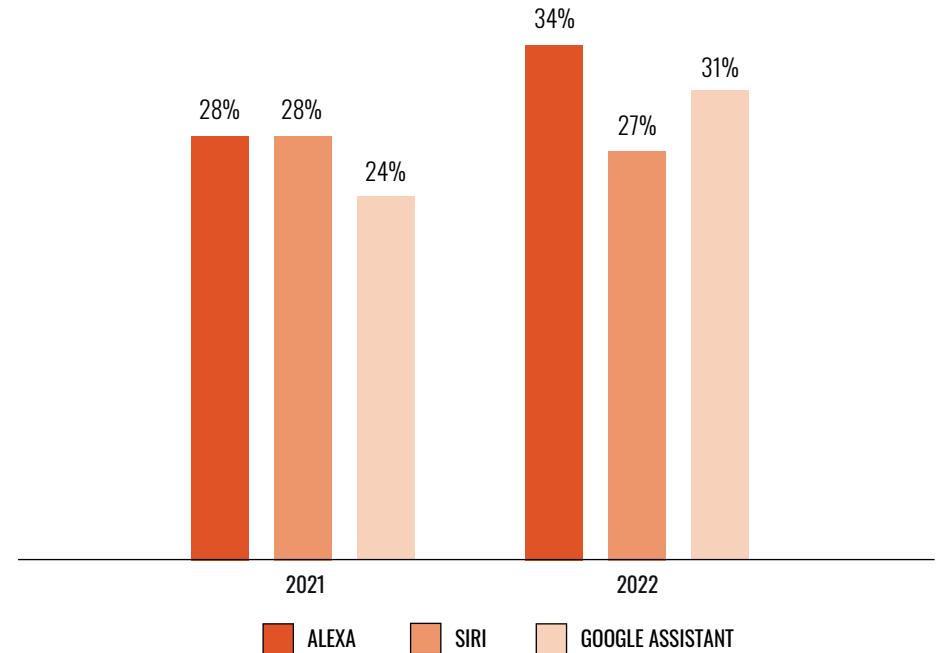
### WHICH VOICE-ENABLED DEVICES ARE PEOPLE USING?

## ALEXA IS STILL PRIMARILY USED ON SMART SPEAKERS, WHILE SIRI AND GOOGLE ASSISTANT REIGN ON MOBILE.

Overall usage across the board has boomed since last year, with Google Assistant smart speaker usage increasing at least fourfold in all three markets.



## CURRENT USAGE IN 2022 VS. 2021



### HOW HAS USAGE GROWN IN THE US AMONGST THE 'BIG THREE'?

## CURRENT USAGE ON ALEXA IS STILL HIGHEST, AND GOOGLE ASSISTANT HAS NOW OVERTAKEN SIRI.



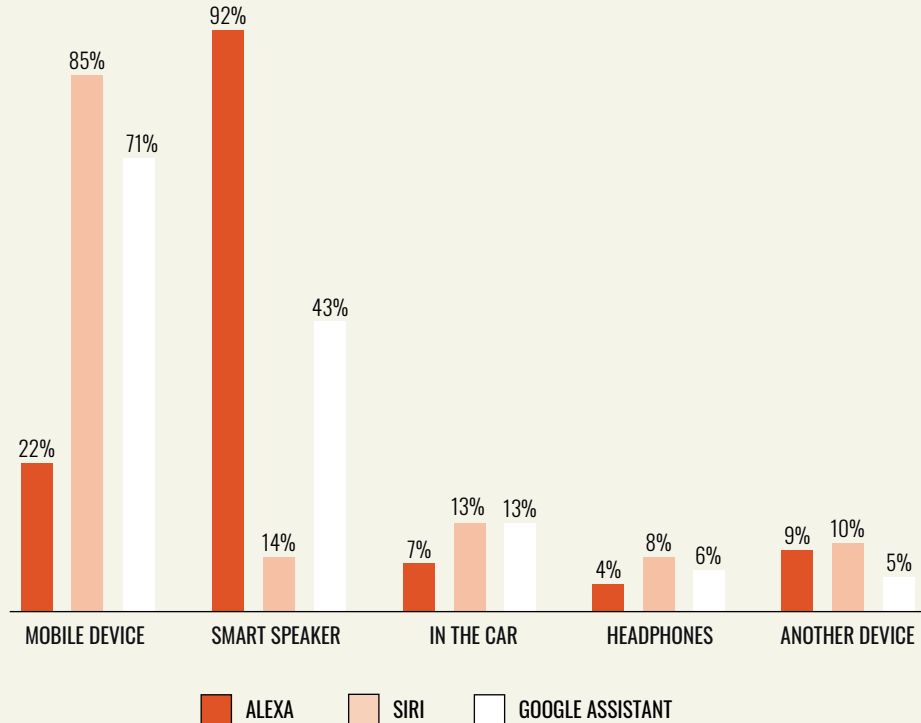
## IN THE UK...



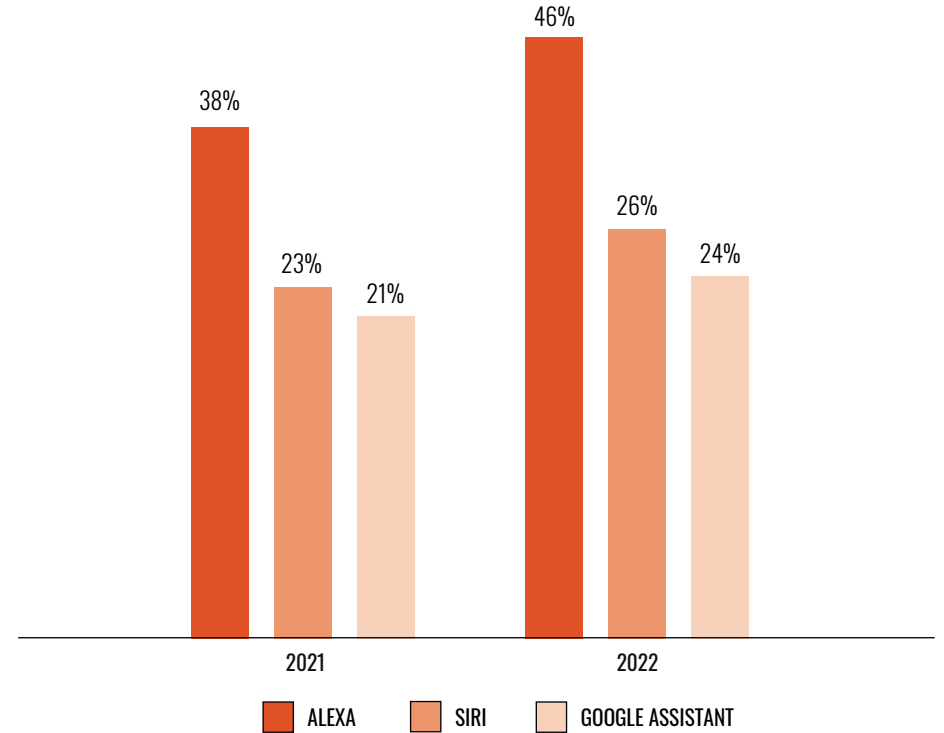
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## CURRENT USAGE IN 2022 VS. 2021



### HOW HAS USAGE GROWN IN THE UK AMONGST THE 'BIG THREE'?

## ALEXA REMAINS CLEARLY IN THE LEAD, WHILE SIRI AND GOOGLE ASSISTANT HAVE SEEN SMALLER GROWTH.



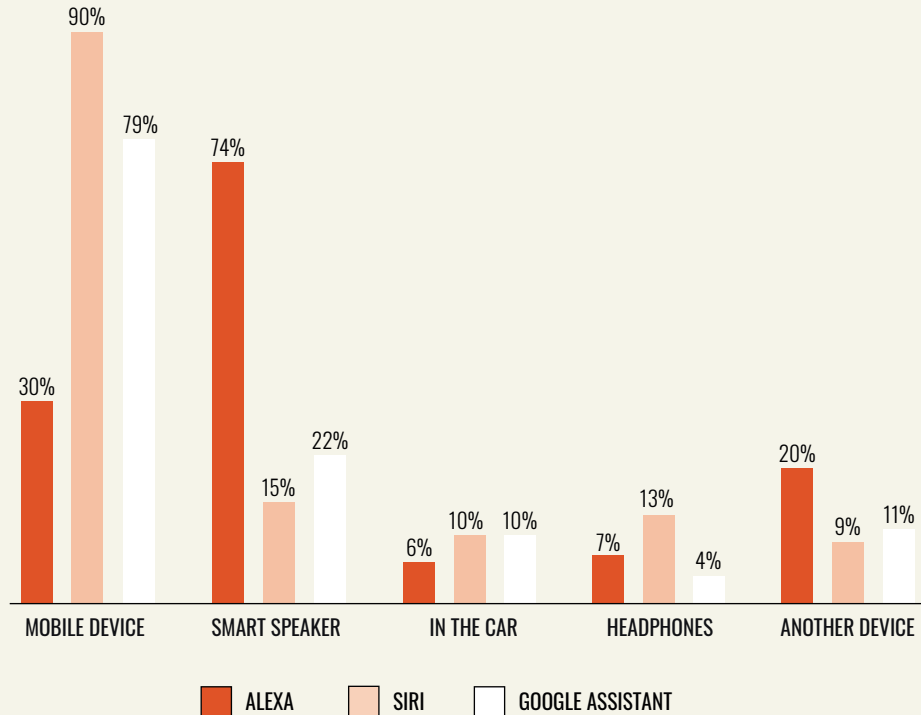


## IN GERMANY...

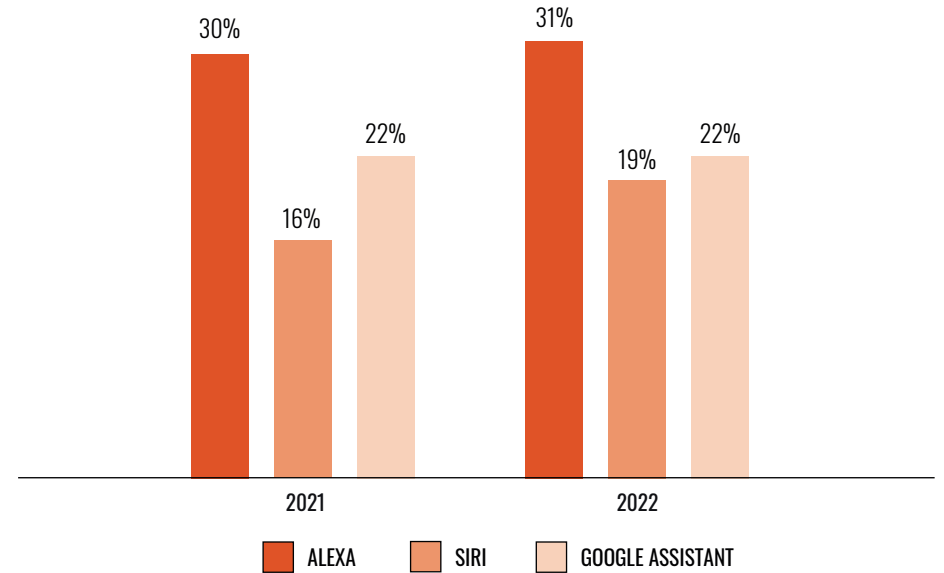
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## CURRENT USAGE IN 2022 VS. 2021



### HOW HAS USAGE GROWN IN GERMANY AMONGST THE 'BIG THREE'?

## ALEXA AND SIRI HAVE SEEN SOME GROWTH, WHILE GOOGLE ASSISTANT HAS REMAINED THE SAME.



## USE OF VOICE ACTIVATED TECHNOLOGY BY SECTOR

### ARE CONSUMERS USING VOICE TO SEARCH ACROSS SECTORS?

**THOSE IN THE US ARE SIGNIFICANTLY MORE LIKELY TO USE VOICE ASSISTANTS FOR ALL SECTORS APART FROM NEWS AND MUSIC WHICH ARE UNIVERSALLY USED HIGHLY.**

Current voice assistant usage has increased in all three markets, but more significantly in the UK and US. However, Germany current usage is still over half, having increased to 54% in 2022.

	US	UK	GERMANY
WEATHER	75%	70%	66%
MUSIC	71%	67%	64%
NEWS	64%	62%	60%
ENTERTAINMENT	62%	50%	49%
RETAIL	54%	37%	40%
FOOD DELIVERY AND RESTAURANTS	52%	41%	36%
HEALTHCARE AND WELLNESS	51%	40%	43%
CONSUMER PACKAGED GOODS	49%	34%	39%
LOCAL SERVICES	49%	37%	34%
MAKING A RESERVATION	47%	36%	37%
FITNESS	46%	37%	39%
FASHION	45%	37%	39%
TRAVEL	43%	33%	38%
FINANCE	42%	27%	30%
OTHER	42%	34%	40%



### RETAIL

Since 2021, voice search in this sector has increased in the UK and US and stayed much the same in Germany. Retail voice search in the US is now over half at 54%, and around 40% in the UK and Germany.



### ENTERTAINMENT

The US saw a significant increase in Entertainment-related voice search this year. Usage increased slightly in the UK, but decreased by 4% in Germany since 2021.



### CONSUMER PACKAGED GOODS

Voice search around Consumer Packaged Goods is highest in the US, followed by Germany, then the UK. Usage in the US is now nearly 50%, but closer to 35% in the UK and Germany.



### HEALTHCARE

Voice search around Healthcare has remained the same in the UK and Germany, but increased notably in the US. Just over half of people in the US – and around 40% in the UK and Germany – use voice to conduct Healthcare-related searches.



## IN SUMMARY

# PEOPLE ARE BECOMING MORE COMFORTABLE USING VOICE TECH ACROSS DIFFERENT DEVICES



BY SUSAN WESTWATER

RESEARCH LEAD, OPEN VOICE NETWORK

## BRANDS MUST CONSIDER MORE THAN JUST SMART SPEAKERS

As usage increases, Voice consumers are not limiting their usage to smart speakers. Similar to how all other digital content must work across multiple channels and devices, brands must have a vision for how their Voice content will be available to all devices their audiences will use to access it. This will not only deliver Voice experiences where users want them today, it will lay the foundation for other emerging channels, like the metaverse.

## VOICE IS BECOMING A PART OF CONSUMERS' DAILY LIVES

Consumers are continuing to embrace Voice technology and more and more are making it a part of their daily lives. Daily usage increased by 8% in the US and 5% in the UK from 2021. More importantly, usage in general increased indicating that as consumers become more comfortable with Voice, they are using it more frequently. With more than half of every market's consumers using Voice, a smart marketer can't afford to ignore Voice as a channel and needs to have a Voice strategy and roadmap so they are not missing an opportunity to reach their audiences.



## SECTION TWO

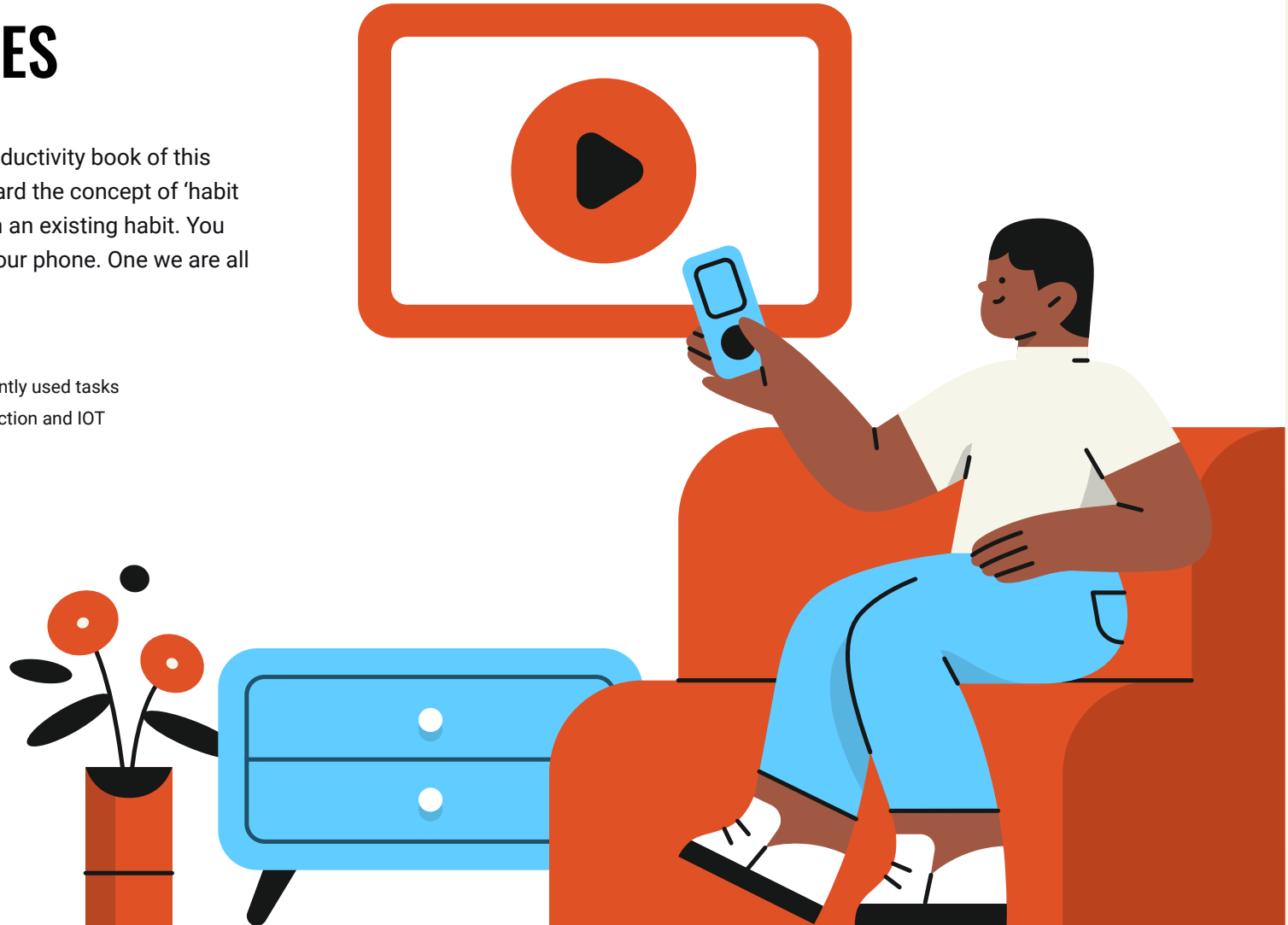
# HABITS AND ROUTINES

In what probably will come to be known as the productivity book of this generation, *Atomic Habits*, James Clear puts forward the concept of 'habit stacking' – building a new habit by coupling it with an existing habit. You turn off your alarm in the morning, you reach for your phone. One we are all probably too guilty of.

In 2022, frequency of use is up in all markets. The most frequently used tasks from last year have become more ingrained – from music selection and IOT control to getting travel information.

The biggest shift has been the growth in commercial activities driven by search. Now more than 92% of Voice consumers are searching the web with their voice – 40% of them do so regularly.

That search is getting more frequent, and more precise. People said that they find voice search more accurate and faster than typing, so they're turning to Voice to ask about brands, local businesses, and specific product information.



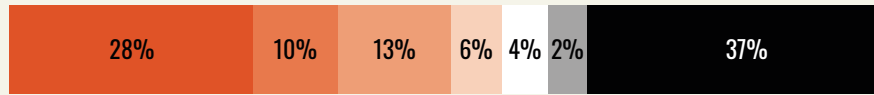
## FREQUENCY OF USE

### HOW OFTEN ARE PEOPLE USING VOICE ASSISTANTS?

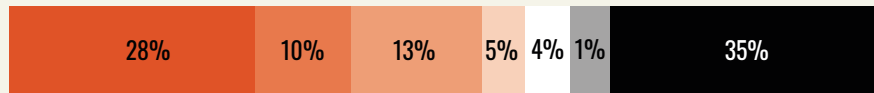
#### MOST PEOPLE USE VOICE ASSISTANTS EVERY DAY.

In all three markets, the percentage of people who use voice assistants daily has approximately doubled since last year.

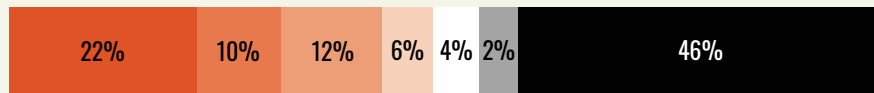
##### US



##### UK



##### GERMANY



## ADDING VALUE WITH VOICE

### DO PEOPLE THINK VOICE ASSISTANTS ADD VALUE TO THEIR DAILY LIVES?

#### PEOPLE RECOGNISE THAT VOICE MAKES COMPLETING TASKS EASY AND EFFICIENT.

Around half of people across the three markets think using voice search is quicker than text, and helps them efficiently find the information they want.

##### UK



##### US



##### GERMANY



## IN SUMMARY

# VOICE IN DAILY LIFE MEANS VOICE THAT'S CONVERSATIONAL, CONVENIENT, AND HELPFUL.



**BY SUSAN WESTWATER**  
RESEARCH LEAD, OPEN VOICE NETWORK

### INCREASED USAGE MEANS MORE TOUCHPOINTS FOR BRANDS

As consumers see the value of Voice, they are finding more ways to use it which, in turn, is increasing the number of Voice touchpoints. Brands need to understand the frequency and diversity of those touchpoints so they can deliver the right message to their audience at the right time and place.

### CONSUMERS NEED ASSISTANCE, NOT ASSISTANTS

The reality of today's consumer is that their primary goal is to find assistance, not necessarily an assistant. Interactions are still task related and success depends upon delivering against user needs and the expectations of convenience and speed. Brands who lead with delivering against those promises and then focus on building engagement and relationships will foster greater loyalty and customer satisfaction.



## SECTION THREE

# VOICE SHOPPING AND PURCHASING BEHAVIOURS

We shop with our voices everyday – in store, on the phone, and at the drive-through – but we don't show up for the conversation. We come to get what we need. We use voice as a tool to research, decide and purchase. We now see that this is becoming a common usage pattern for conversational AI as well.

In 2022 we notice another tipping point: more than half of US Voice users are shopping with their voice. We know that voice interfaces and conversational assistants play an even bigger role in those top-of-funnel moments when we are researching what to buy and where to buy it.

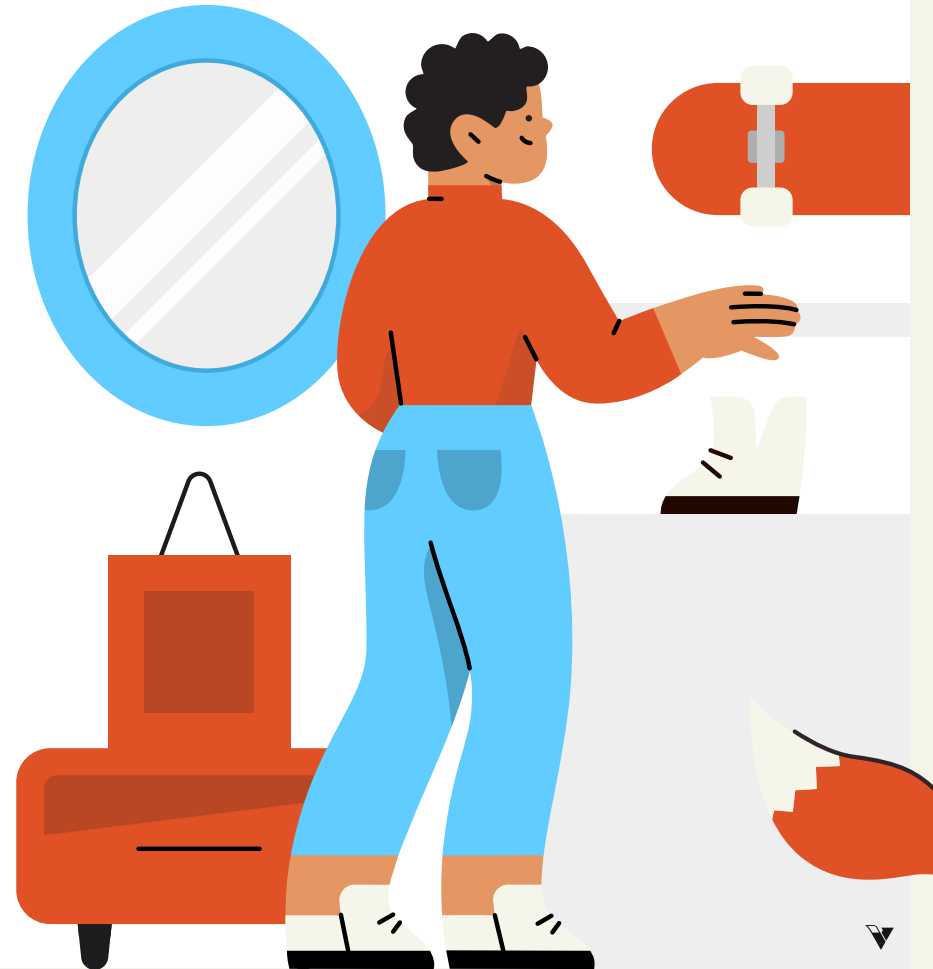
The interest in using Voice for shopping is beginning to expand beyond low price point purchases into totally new categories. Previously, Consumer Goods and Entertainment made up the majority of voice purchases. We now see users searching and shopping across a broader range of products and categories than ever before, including Fashion, Fitness, and Finance.

What may be most telling, however, is the types of questions people are asking when searching for

information about products and services, most notably in Healthcare. More than 50% of Voice users are likely to use conversational technology to get important information such as disease education, finding treatment options for a condition, or checking drug dosages.

Voice also plays a big role in the consumer journey post purchase. Users are looking to brands and businesses to support them with customer service tasks such as parcel tracking, account management, and troubleshooting product issues.

Now is the time to start helping customers across the whole consumer journey with Voice technology. It's no longer a nice-to-have, but is expected.

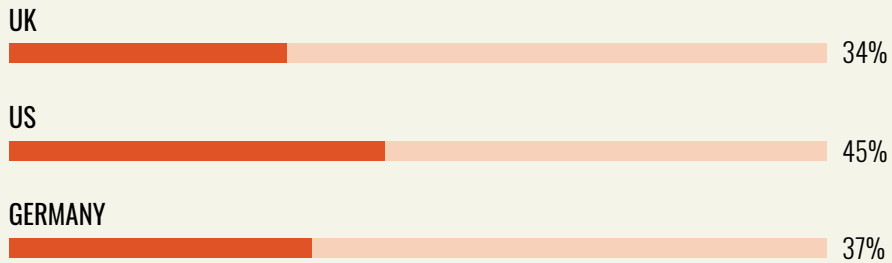


## INFORMATION DISCOVERY

### USING VOICE TO CONDUCT A SEARCH ON A SMARTPHONE BY MARKET

**AT LEAST ONE IN THREE PEOPLE IN EACH MARKET USE VOICE ON THEIR SMARTPHONE TO DISCOVER INFORMATION.**

This forms the basis of the buyer journey, and has increased since last year in the UK and US while Germany has remained at 37%.





## RETAIL AND E-COMMERCE

### WHAT ARE PEOPLE USING VOICE FOR IN THE RETAIL SECTOR?

**PEOPLE IN ALL THREE MARKETS ARE LIKELY TO USE VOICE TO COMPLETE THE SHOPPING-RELATED TASKS THAT ARE MOST IMPORTANT TO THEM.**

These include tracking packages, delivery statuses, and searching for information about products and services.

	US	UK	GERMANY
TRACK THE LOCATION OF A PACKAGE	65%	64%	63%
CHECK THE SHIPPING OR DELIVERY STATUS OF MY ORDER	62%	64%	65%
SEARCH FOR INFORMATION ABOUT A PRODUCT OR SERVICE	58%	55%	54%
FIND ANSWERS TO COMMON QUESTIONS	57%	51%	47%
REVIEW OR CONFIRM AN ORDER	55%	55%	52%
LEARN MORE ABOUT A PRODUCT (PRICE/AVAILABILITY)	54%	52%	58%
FIND PROMOTIONAL OFFERS OR DISCOUNTS	52%	55%	60%
COMPARE THE DIFFERENCES BETWEEN TWO OR MORE PRODUCTS	49%	48%	53%
FIND THE LOCATION/OPENING TIMES OF A RETAIL STORE OR RESTAURANT	49%	53%	52%
PURCHASE A PRODUCT FOR PICKUP OR DELIVERY	48%	49%	49%

# 65%

**OF PEOPLE SAY THAT TRACKING THE LOCATION OF A PACKAGE OR CHECKING THE DELIVERY STATUS OF AN ORDER ARE THE TWO MOST IMPORTANT TASKS THEY WOULD USE VOICE FOR.**

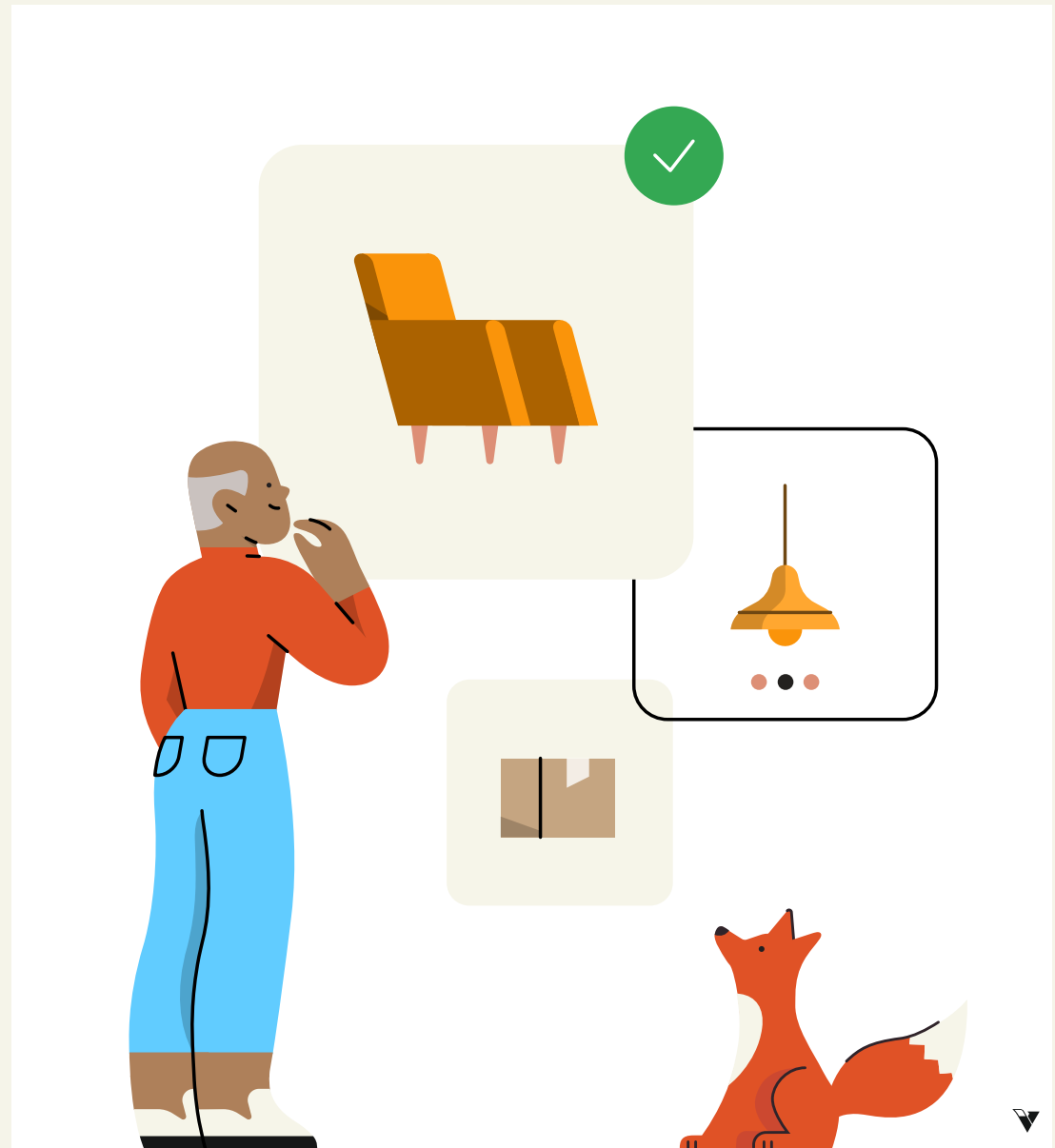
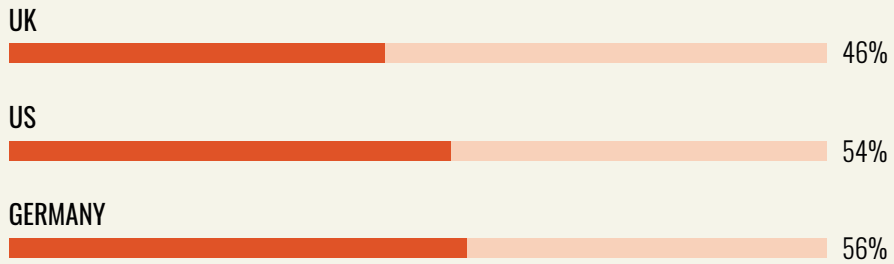


## CONSUMER PACKAGED GOODS

WHERE DOES VOICE ADD VALUE IN THE CONSUMER PACKAGED GOODS SECTOR?

**ORDERING PRODUCTS IS A TOP-PRIORITY TASK FOR PEOPLE IN ALL THREE MARKETS, AND THEY'RE USING VOICE TO DO SO.**

These include tracking packages, delivery statuses, and searching for information about products and services.

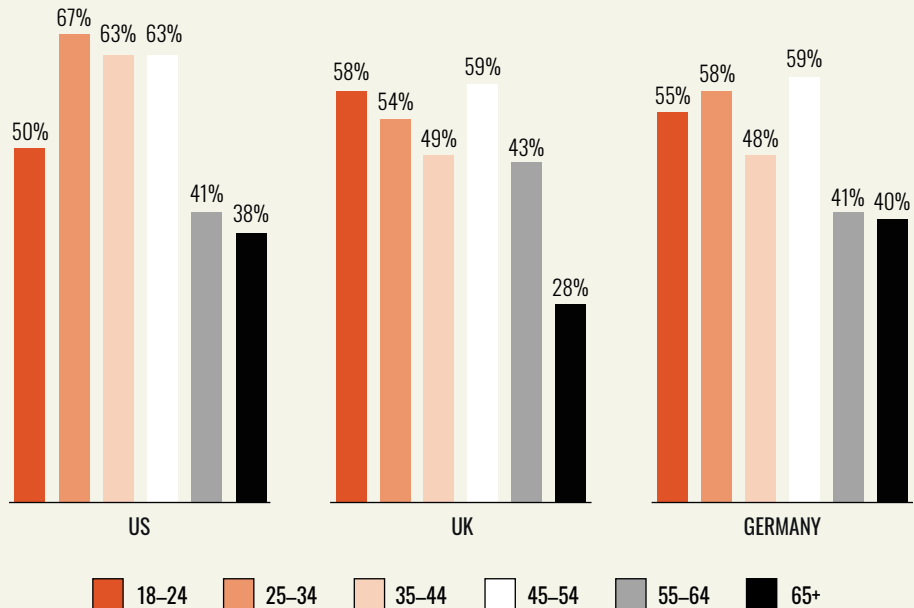


## PURCHASES BY AGE

### WHO IS MAKING PURCHASES USING VOICE?

## YOUNGER MILLENNIALS ARE THE MOST LIKELY AGE GROUP TO USE VOICE TO MAKE PURCHASES, ACROSS THE THREE MARKETS.

25 to 34-year-olds expressed the highest likelihood, with 45 to 54-year-olds following suit.



## IN SUMMARY

# BRANDS NEED TO CATER FOR PEOPLE WHO WANT TO PURCHASE THROUGH VOICE.



**BY SUSAN WESTWATER**

RESEARCH LEAD, OPEN VOICE NETWORK

## VOICE CAN SUPPORT THE ENTIRE PURCHASE PROCESS

As we see Voice become part of consumers' lives, their willingness to make purchases using it continues to increase. With just over a third of each market using Voice to make purchases, now is the time for brands to think beyond customer service and look to support the entire pathway to purchase and retention.

## OPTIMISE FOR VOICE SEARCH

Now is the time to optimise for voice search: It's time to focus on long-tail phrases instead of keywords. As consumers have become more comfortable using voice search, their queries have become more conversational. That means winning position zero means answering questions, not just incorporating keywords into your content.



## SECTION FOUR

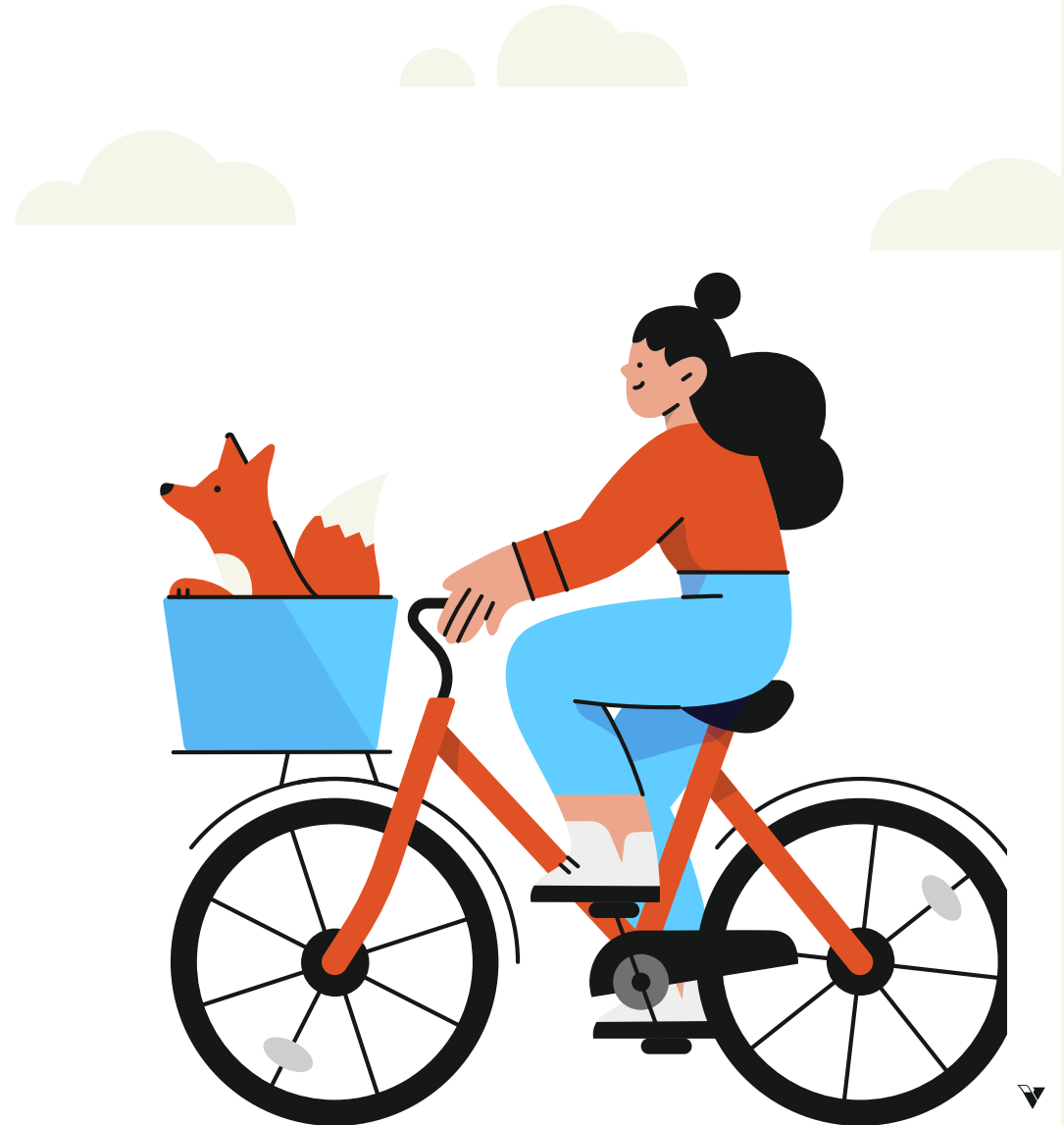
# OUTSIDE THE HOME

During the pandemic, using our voices came naturally within the comfort of our homes. We began to use smartphones and speakers daily to manage household tasks and keep ourselves entertained. Growth in the connected headphone market, voice integration into many more car head units, and new wearable devices are unleashing new opportunities for us to stay connected to our conversational assistants outside the home.

Whilst some remain uncomfortable with the idea of speaking out loud to their voice assistant in public settings, we see that overall that hurdle is being overcome. This is particularly true of millennial groups who are more likely than any other cohort to use their voice outside in places like pubs, shops, and the office.

Whilst many users have begun to use their voice to get many things done throughout the day, we also see a lack of understanding of the potential of Voice as a tool, with users looking to explore how they can get more out of their voice assistant.

Perhaps most surprisingly, we have finally begun to see a decline in concern about privacy and trust related to using Voice. As users become more reliant on their conversational assistants, and more aware of how they can control how their data is used, privacy concerns start to subside.



IN THE US...



41%

OF PEOPLE USE SMART SPEAKERS AT HOME, MULTIPLE TIMES A DAY.



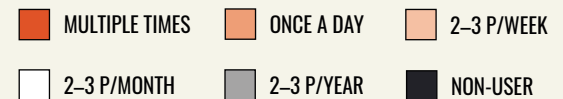
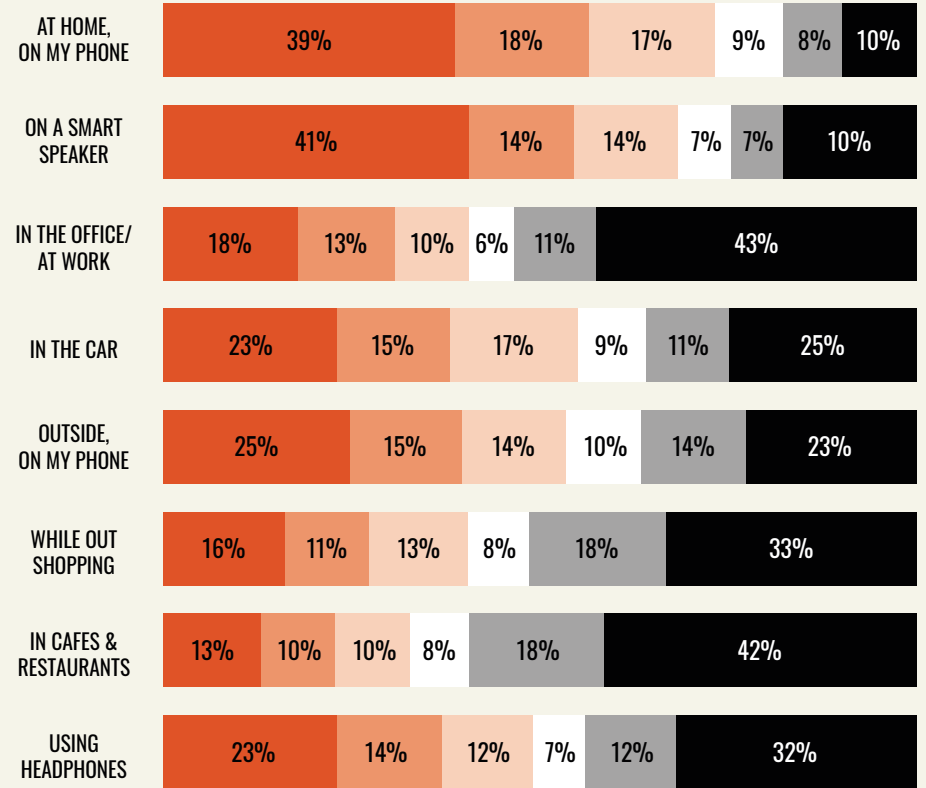
38%

OF PEOPLE USE VOICE IN THE CAR OR VIA HEADPHONES EVERY DAY.

WHERE ARE PEOPLE USING VOICE?

OUT-OF-HOME VOICE USAGE HAS INCREASED, WITH DAILY MOBILE USAGE HOVERING AT 30% IN EACH MARKET.

However, people still most frequently use Voice at home, either on mobile or smart speaker, compared to other locations.



## IN THE UK...



# 26%

**OF PEOPLE USE VOICE IN THE CAR OR VIA A MOBILE DEVICE EVERY DAY.**



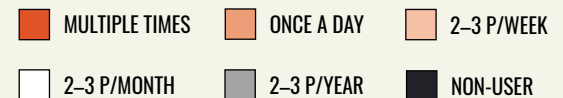
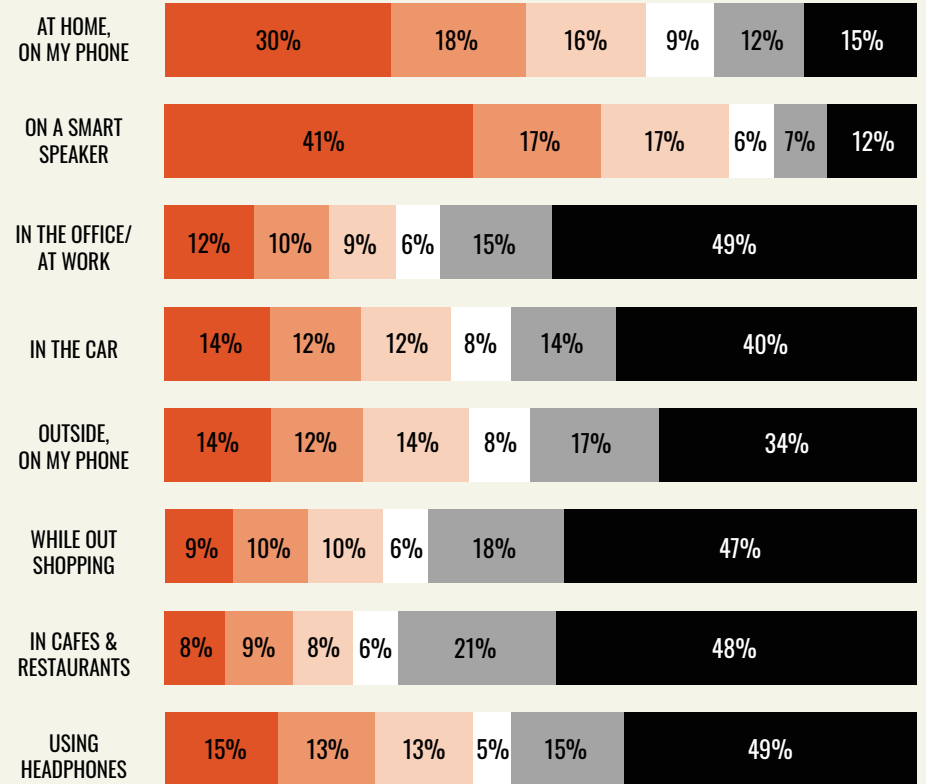
# 41%

**OF PEOPLE USE SMART SPEAKERS AT HOME, MULTIPLE TIMES A DAY.**

### WHERE ARE PEOPLE USING VOICE?

**OUT-OF-HOME VOICE USAGE HAS INCREASED, WITH DAILY MOBILE USAGE HOVERING AT 30% IN EACH MARKET.**

However, people still most frequently use Voice at home, either on mobile or smart speaker, compared to other locations.



## IN GERMANY...



# 49%

**OF PEOPLE IN GERMANY USE VOICE EVERY DAY AT HOME, EITHER ON SMART SPEAKERS OR ON A MOBILE DEVICE.**



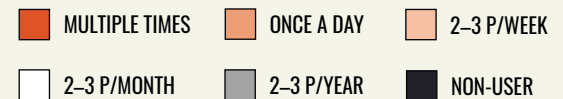
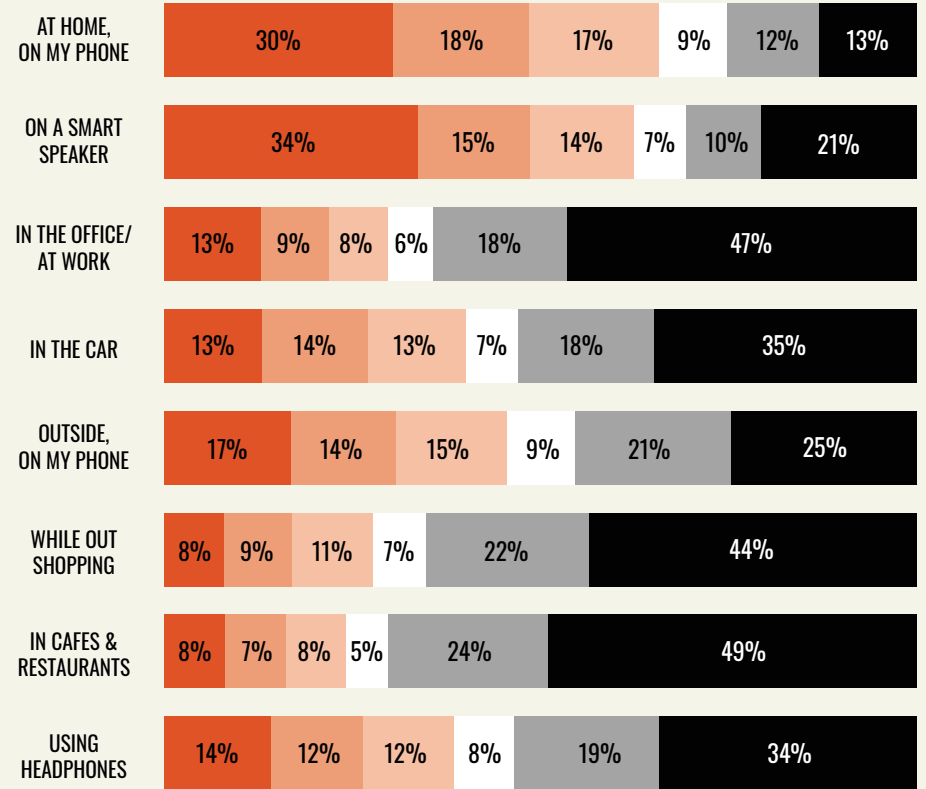
# 27%

**OF PEOPLE USE VOICE IN THE CAR EVERY DAY.**

### WHERE ARE PEOPLE USING VOICE?

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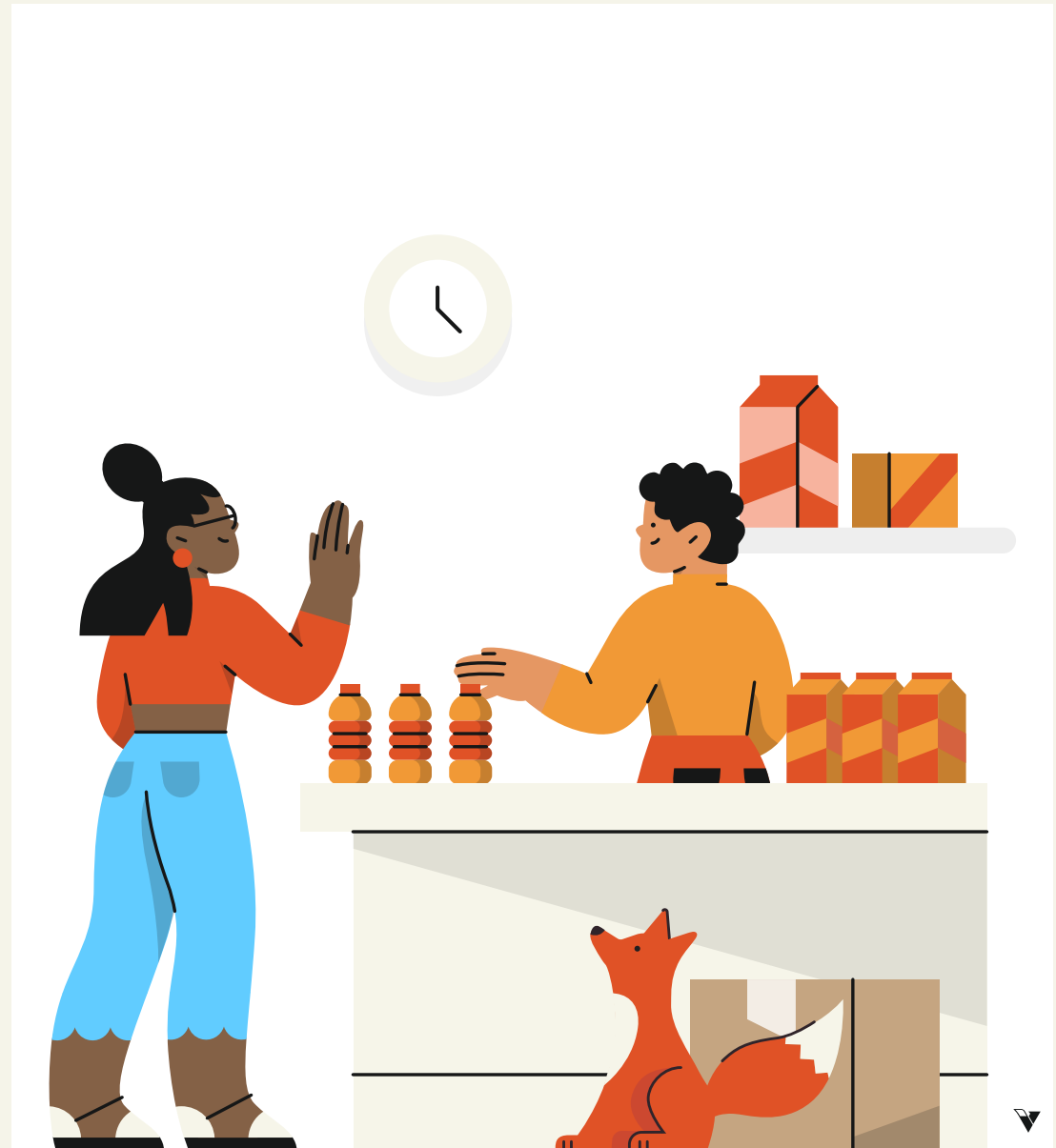
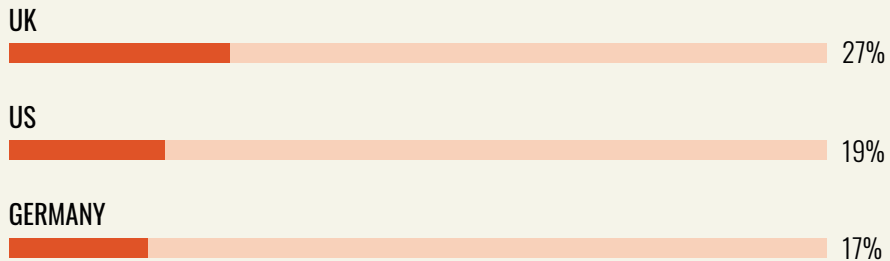


## OUT-OF-HOME BEHAVIOURS

### WHERE ARE PEOPLE USING VOICE?

**NEARLY A THIRD (27%) OF PEOPLE IN THE US ARE USING VOICE DAILY WHEN OUT SHOPPING.**

This segment is closer to 20% for those in the UK and Germany, confirming an increase in all three markets since 2021 for this task.

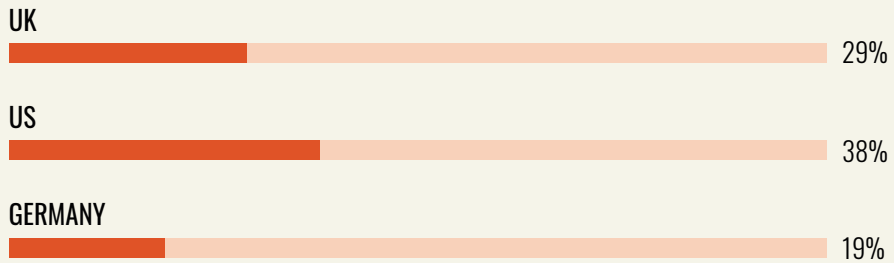


## OUT-OF-HOME BEHAVIOURS

### WHERE ARE PEOPLE USING VOICE?

**NEARLY 40% OF US PEOPLE ARE COMFORTABLE USING VOICE IN PUBLIC, COMPARED TO 30% IN THE UK AND 20% IN GERMANY.**

Since 2021, this has increased by over 10% in the US, with a slightly smaller increase in the UK, and minimal change in Germany.



## IN SUMMARY

# PEOPLE ARE USING VOICE BOTH AT HOME AND ON-THE-GO, SO CONSISTENCY ACROSS DEVICES IS KEY.



**BY SCOT WESTWATER**  
RESEARCH LEAD, OPEN VOICE NETWORK

### AND KEEP IT CONSISTENT

As conversational assistants reach across devices, consistency is critical. That consistency is built through unified sonic branding, content, functionality, and features.

### BRANDS MUST UNDERSTAND THEIR CUSTOMER JOURNEYS

As expected, voice assistance usage outside of the home increased from 2021. The same rules that apply for supporting your customers with mobile, outside the home, still apply. When thinking about context, a brand cannot generally assume mobile means on the go and can include home usage. The key to a successful experience is making sure a brand understands its customer journey and where its audience engages with it so that the right message is delivered at the right time and place.



## SECTION FIVE

# THE FUTURE OF VOICE ASSISTANCE

The word of 2022 hasn't been announced at the time of writing, but we would have good money on "metaverse" being a contender. For a term that has only recently entered public consciousness, more than two-thirds of consumers are aware of it. However, only one in ten would say they fully understand it.

The more we see developments from Meta, Apple, Google, and Microsoft, the more obvious it becomes that conversational technologies will be essential for 'the metaverse' (or more likely, many metaverses) to succeed.

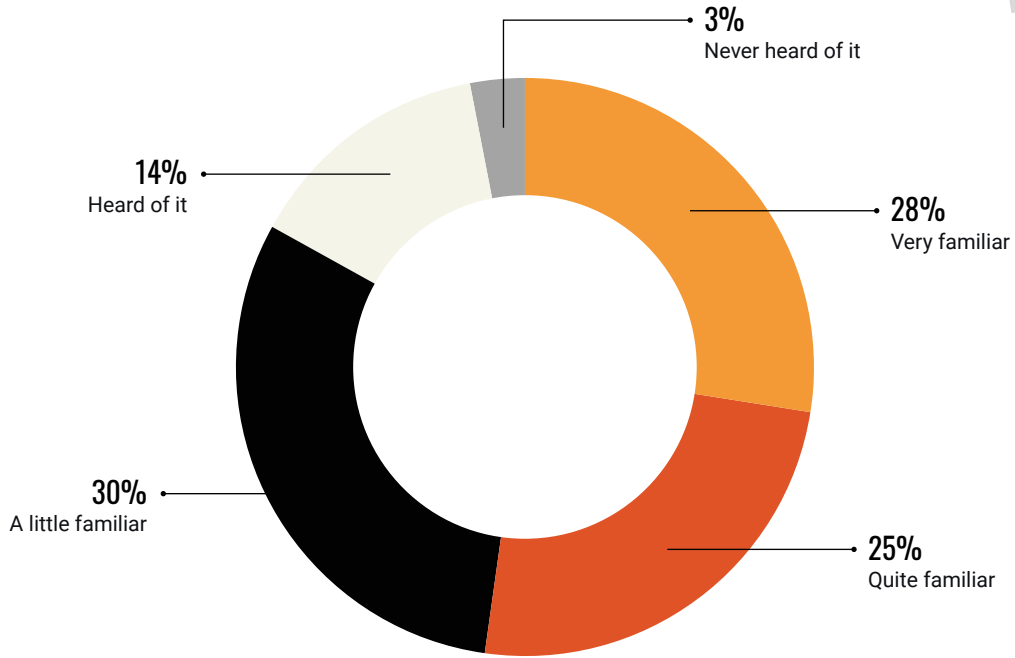
Looking to the future, a third of users expect to use Voice more than they do today – this year's VCI data points to that trend being increasingly on the move, on cellular connected devices. As the major manufacturers move more computer power to the device, cloud infrastructure continues to scale, and 5G rolls out, the conversational metaverse becomes more viable.

One core component of the metaverse will be engagement with 'synthetic' media – AI-generated and controlled avatars, objects, and environments. Consumers' understanding is still very nascent of these, but around 30% of users in all markets would be willing to interact with synthetic media to search for information and be assisted in making purchases.

So while 2022 may be the year of the metaverse conversation, we have to look to 2023 and beyond for the conversational metaverse to come to the mainstream.



## IN THE US...



## HOW FAMILIAR ARE PEOPLE WITH VOICE TECHNOLOGY?

**OVER 80% OF PEOPLE IN THE UK AND US ARE FAMILIAR WITH VOICE TECH TO SOME EXTENT, COMPARED TO 62% IN GERMANY.**

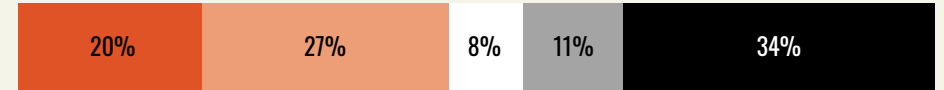
This trend is similar to last year, suggesting the German Voice market is comparatively static.

## HOW FAMILIAR ARE PEOPLE WITH VOICE TECHNOLOGY?

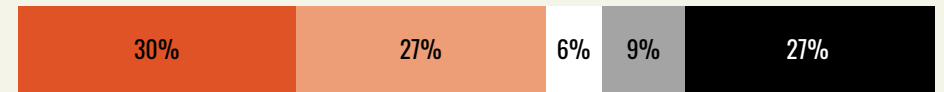
**THE VOICE ASSISTANT THAT MOST PEOPLE ARE AWARE OF IS ALEXA, FOLLOWED BY SIRI, THEN GOOGLE ASSISTANT.**

This is true for all three markets, and is an extension of the same trend seen in 2021.

### ALEXA (AMAZON)



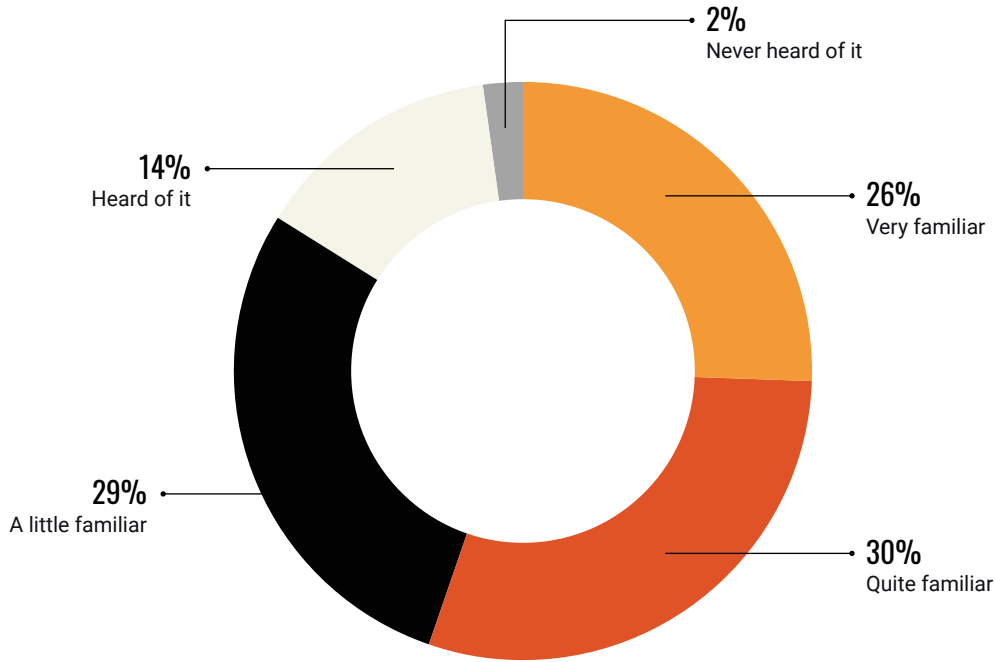
### SIRI (APPLE)



### GOOGLE ASSISTANT



## IN THE UK...



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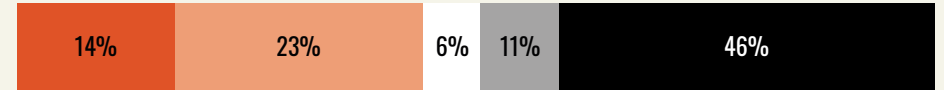
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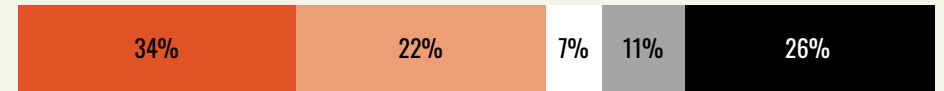
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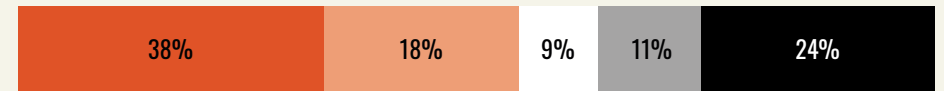
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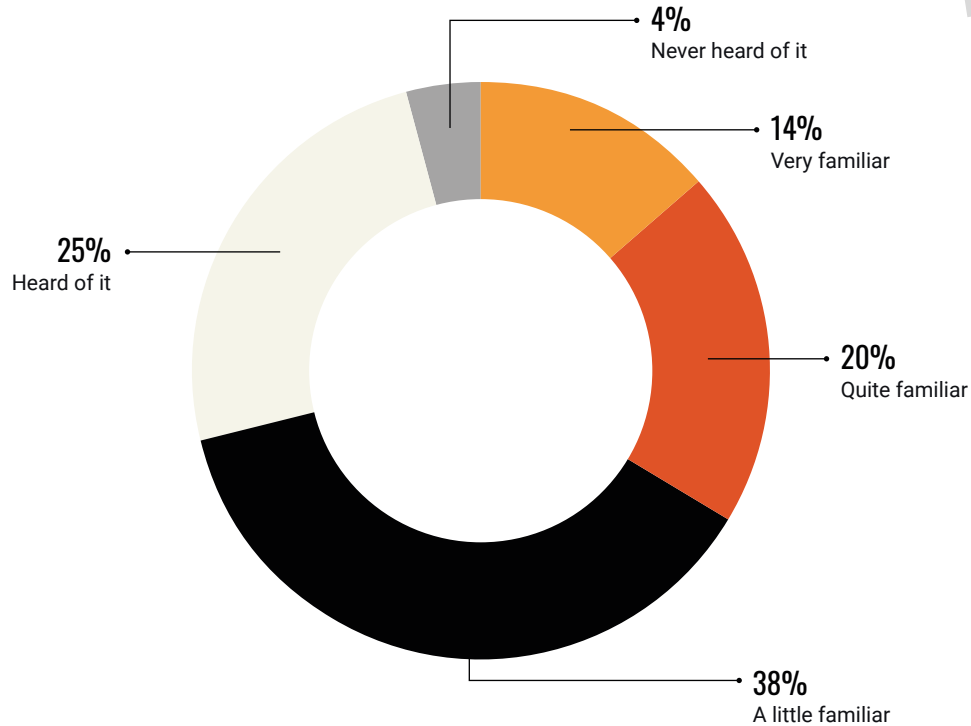
### SIRI (APPLE)



### GOOGLE ASSISTANT



## IN GERMANY...



## HOW FAMILIAR ARE PEOPLE WITH VOICE TECHNOLOGY?

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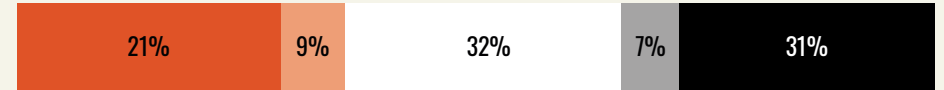
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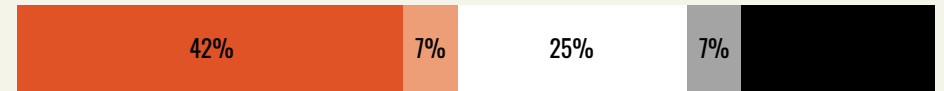
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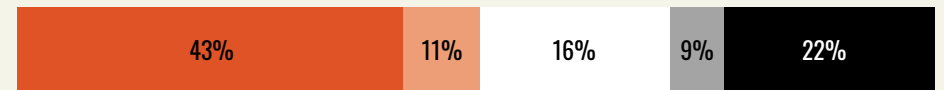
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### SIRI (APPLE)



### GOOGLE ASSISTANT

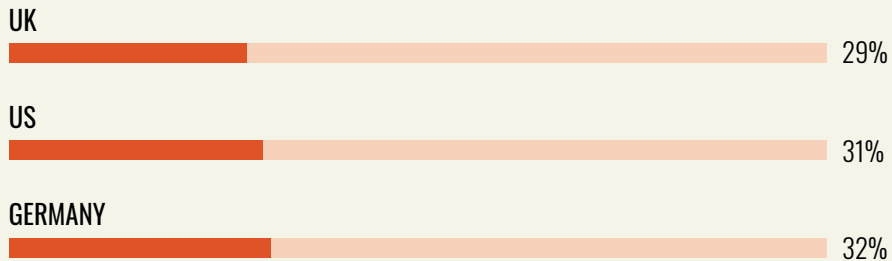


## ATTITUDES TOWARDS VOICE TECHNOLOGY

### DO PEOPLE TRUST VOICE TECHNOLOGY?

#### MISTRUST OF VOICE TECHNOLOGY HAS DECREASED IN ALL THREE MARKETS SINCE LAST YEAR.

Trust remains a top factor when people consider using voice tech, but this overall decrease suggests people are becoming more comfortable using Voice.

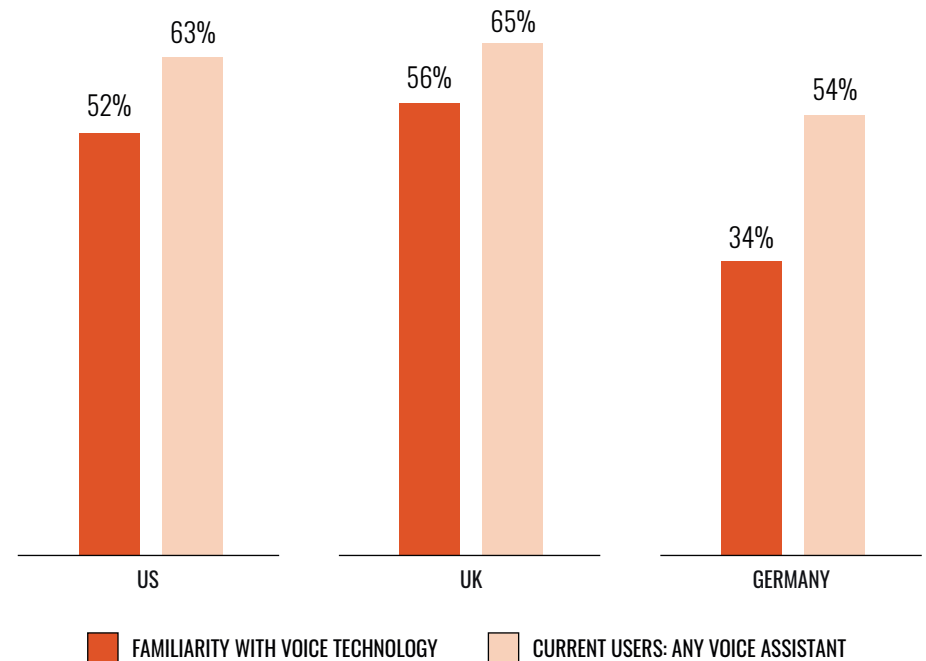


## USAGE VS. FAMILIARITY

### HOW FAMILIAR ARE PEOPLE WITH VOICE TECHNOLOGY?

#### THE NUMBERS REFLECTING CURRENT VOICE USAGE ARE HIGHER THAN THOSE FOR FAMILIARITY WITH VOICE TECHNOLOGY IN ALL THREE MARKETS.

This indicates that despite using the tech, people may not be familiar with the actual definition of voice-activated technology.





## VOICE AND THE METAVERSE

### ARE PEOPLE AWARE OF THE METAVERSE?

#### THE MAJORITY OF PEOPLE ARE AWARE OF THE METAVERSE, BUT DON'T KNOW WHAT IT IS.

In all three markets, most people have heard of metaverses, like Facebook's Metaverse, but have not experienced them first-hand.

US



UK



GERMANY



YES  NOT SURE  NO



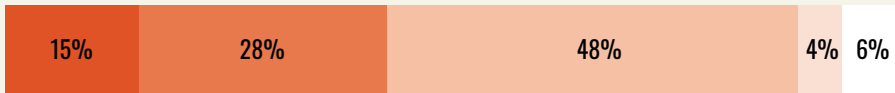
## THE FUTURE OF VOICE ASSISTANTS

### WILL PEOPLE CONTINUE USING VOICE IN THE FUTURE?

**OVER THE NEXT YEAR, AROUND 40% OF PEOPLE IN EACH MARKET WILL USE VOICE ASSISTANTS MORE THAN THEY DO NOW.**

This segment has increased since 2021 in the US and UK, and stayed the same in Germany.

US



UK



GERMANY



**A LOT MORE**   **A LITTLE MORE**   **THE SAME**   **A LITTLE LESS**   **A LOT LESS**

## ATTITUDES TOWARDS VOICE ASSISTANTS

### ARE PEOPLE INTERESTED IN THE FUTURE OF VOICE?

**PEOPLE IN ALL THREE MARKETS ARE INTERESTED IN THE FUTURE OF VOICE TECHNOLOGY.**

Half of all participants say they are looking forward to seeing how voice assistant tech will develop.

UK



US



GERMANY



## IN SUMMARY

# BRANDS SHOULD START EXPLORING SYNTHETIC MEDIA AND THEIR PRESENCE IN THE METAVERSE AS CONSUMERS' ACCEPTANCE GROWS.



**BY SUSAN WESTWATER**

RESEARCH LEAD, OPEN VOICE NETWORK

## LOOKING TO THE FUTURE

How consumers understand the metaverse is evolving and is not yet formalised. However, there is an appetite for partially or completely immersive experiences and that should not be ignored. Now is the time for brands to begin to unlock their presence and content so that they can be prepared to meet their audiences where they are and where they will be.

## A POWERFUL NEW TOOL

While synthetic media has reached a level of maturity and sophistication that delivers believable digital recreations of humans, its usage by brands and marketers is in its infancy. With consumer acceptance over a third, brands have a powerful new tool for creating and maintaining their literal brand voice efficiently across multiple channels (commercials, video, audio content, etc.).



# 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.

Whether you're looking to start your voice strategy, voice application project or get your metadata in order for voice search – it all starts with a conversation. A conversation with us.

EMAIL US AT [INFO@VIXENLABS.CO](mailto:INFO@VIXENLABS.CO)



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