The Vixen Labs Voice Commerce Report 2020 offers the latest insights into the buying habits of UK voice users. The online survey of 1000 participants was carried out in late September ‘20, and delivered in collaboration with our research partners Delineate.

This exclusive snapshot of the UK voice commerce landscape reveals not only what people are searching for and buying via voice, but also why they are now purchasing in this way. 2020 has disrupted our lives in unprecedented ways, and consumer shopping behaviours have been fundamentally altered. The COVID-19 pandemic sparked a renewed interest in touch-free solutions and prompted a surge in smart speaker usage.

The report explores four key sectors in detail: Finance, Retail, Entertainment and Food Delivery. For each industry, key demographics and consumer habits are featured, providing a unique strategic deep dive.

“The jump in user behaviour around voice commerce is staggering. This report conclusively shows that voice technology is a revenue opportunity for brands. With 70% of voice users in the UK now using their devices to search for information about specific brands, and 40% of users making purchases via voice, it’s clear... Consumers have made the switch and they aren’t turning back.” - Jen Heape, Vixen Labs CCO

It’s time your business started the conversation about voice now. Your customers are already there.

To book a 1:1 consultation with us on the stats that matter to your business, email vcr@vixenlabs.co
Vixen Labs is Europe’s leading strategy consultancy and app development studio for voice assistants and conversational AI. Put simply, we help global brands and businesses connect with audiences in the most intuitive way possible – with their voices.

Led by founders James Poulter and Jen Heape, our team of world class strategists, creatives, technologists, and voice user experience specialists bring a wealth of expertise and knowledge to the voice industry. So whether you are starting out with your voice strategy, or looking to scale into a cross-platform, multi-market voice experience – we’re here to help.

Our specialised, industry-leading offering helps some of the world’s largest companies with all levels of implementing and leveraging voice technology; from structuring metadata for voice search, realising the opportunity for voice commerce, to producing and marketing exceptional voice experiences.
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40% OF USERS ARE MAKING PURCHASES VIA VOICE

// Vixen Labs Voice Commerce Report 2020
VIXEN LABS VOICE COMMERCE REPORT 2020

EXECUTIVE SUMMARY

// VOICE COMMERCE

- 50% of parents are making purchases via voice
- 53% of 25-to-33-year-old parents use voice to order a food delivery
- 4 in 10 parents are willing to book tickets for an event or destination via voice
- Email vcr@vixenlabs.co to book a free 1:1 consultation discussing our results in more depth.

Use of voice activated technology to make purchases

- Never
  - Male: 58%
  - Female: 62%
- Occasionally
  - Male: 57%
  - Female: 51%
  - 18 to 24: 62%
  - 25 to 34: 62%
  - 35 to 44: 69%
  - 45 to 54: 78%
- Sometimes
  - Male: 19%
  - Female: 19%
  - 18 to 24: 20%
  - 25 to 34: 21%
  - 35 to 44: 21%
  - 45 to 54: 20%
  - 55 to 64: 12%
  - 65+: 10%
- Regularly
  - Male: 17%
  - Female: 14%
  - 18 to 24: 17%
  - 25 to 34: 9%
  - 35 to 44: 11%
  - 45 to 54: 3%
  - 55 to 64: 3%
  - 65+: 2%

ET7: Thinking about how you currently use voice activated technology. Which, if any, of the following do you use voice activated technology for? Making Purchases

Base sizes: Current users: n=558    Male (n=284), Female (n=274), 18-24 (n=93), 25-34 (n=112), 35-44 (n=106), 45-54 (n=85), 55-64 (n=34), 65+: (n=82); Parents with under 10’s (n=115), Parents 10-17’s (n=111), Empty nesters (n=89), 55+ living alone* (n=31); Alexa users (n=329), Siri Users (n=219), Google Assistant users (n=195) *= sub base is small, % indicative only © Vixen Labs Voice Commerce Report 2020 www.vixenlabs.co
While 40% of all users say they are willing to make a purchase via voice, it is parents who are most likely to use voice commerce. The speed and convenience of being able to place an order or buy an item, over-rides any concerns they may have over privacy or accuracy.

Voice offers a solution for busy parents on the go, who are looking to multi-task and want a quick and easy way of placing an order. This is highlighted by the fact that food delivery is the top voice commerce use case for young parents with children under 10.

People are used to placing a food delivery order over the phone or via the web, and users of all ages are willing to accept voice as another way of doing so. Even in the 65+ age range, where around 20% of users say they would make a purchase via voice, food delivery was the top use case.

People in the UK are also comfortable with booking tickets for events or destinations via voice-activated devices. Whether it’s a ticket for a performance or a journey, people are happy with the idea of booking via voice. While the stats around bookings are encouraging, we believe they could be significantly higher if it weren’t for the current global Covid-19 pandemic.
70% of users are searching for information about specific brands

// Vixen Labs Voice Commerce Report 2020
// VOICE SEARCH

- **70% of users are searching for specific brands and businesses**

- If your content isn’t optimised for voice you could be **missing out on customers**.

- Consumers are using voice to find out **targeted information** quickly.

- Voice can enhance the customer experience offering **on-demand information** about your brand or business.

- Creating a **voice strategy** is a great way to ensure your content is optimised for **voice search** and **voice commerce**.
// VOICE SEARCH

- **80% of users are searching for product and service information at least occasionally**

- Consumers in the UK are turning to voice-activated devices to do their research before making a purchase.

- That’s everything from **stock levels and functionality** to **store locations and opening hours**.

- Voice cuts out the noise, providing **one answer to one question**. A conversational experience avoids the need to wade through blue links to find what you’re looking for.

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**Do you use voice activated technology to search for information about products and services?**

- Regularly: 22%
- Sometimes: 26%
- Occasionally: 32%
- Never: 20%

**ETI:** Thinking about how you currently use voice activated technology. Which, if any, of the following do you use voice activated technology for? Base sizes: Current users. © Vixen Labs Voice Commerce Report 2020
// VOICE SEARCH

- Asking a question is such a natural thing to do. Searching for information via voice technology is intuitive and logical. **Now is the time to ensure information about your brand and business is there to be found** when someone asks about the service or products you provide.

- A voice search is quick, easy and convenient which is why **90% of 35-44 year olds are likely to ask for general information via voice.**
40% of users are using voice via headphones or in the car

// Vixen Labs Voice Commerce Report 2020
// VOICE DEVICES

- Around 40% of users say they’re using voice via headphones or in the car

- Wearables such as the Apple AirPods, Echo Buds and Google Smartwatches are giving people the opportunity to search and buy on the move.

- Many people are using voice apps on their smartphone to send messages or navigate apps.

- Adding voice invocations to marketing is a great way to direct people to your content. With people making use of voice activated devices away from the home, it offers an opportunity for people to 'see it and say it'.

- If your brand’s content is optimised for voice, then people are more likely to find you whether they ask their assistant via smart speaker, headphones or smartphone.

Percentage of people using voice activated technology in the car or using headphones at least monthly

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<thead>
<tr>
<th></th>
<th>In the car</th>
<th>Using headphones</th>
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<tbody>
<tr>
<td>Current users</td>
<td>45%</td>
<td>41%</td>
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ET9: How often do you currently use voice activated technology when you are in any of the following situations? Base sizes: Current users: n=558 © Vixen Labs Voice Commerce Report 2020 www.vixenlabs.co
8 in 10 people are using Siri, while 6 in 10 are using Google Assistant, via their smart phone

Voice enables consumers to check reviews, stock levels and store details quickly and easily while doing the weekly shop.

With voice-activated tech in their pockets, people have access to fast information wherever they are.

It is mainly millennials who are using voice on their smartphones with 94% of 18-24 year olds saying they use Siri.

However, there is a gender split when it comes to using voice in public. Almost 70% of women say they are not comfortable using voice in public, compared to 56% of men.
// VOICE DEVICES

- 33% of users say they use Alexa daily. 18% say they use Google Assistant every day

- Alexa is the most widely recognised and used voice-activated tech in the UK with 30% of people using Amazon’s technology. Around 25% of people are using Google Assistant via a smart speaker, with less than 10% currently using Samsung’s Bixby, Microsoft’s Cortana or Facebook’s Portal.

- Ensuring your brand has a presence on Alexa or Google Assistant opens your business to an audience of voice consumers.

Percentage of people using Alexa and Google Assistant every day

<table>
<thead>
<tr>
<th>Alexa</th>
<th>Google Assistant</th>
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<tr>
<td>33%</td>
<td>25%</td>
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ETB: Generally, how often do you use Alexa / Siri / Google Assistant
Base sizes: Alexa user base n=329, Siri user base n=219, Google assistant user base n=19 © Vixen Labs Voice Commerce Report 2020 www.vixenlabs.co
60% of users automate tasks and save time by using voice regularly.

// Vixen Labs Voice Commerce Report 2020
// VOICE USAGE

- **21% of 25-34 year olds say they automate tasks using voice apps**

- **Automating tasks by voice** is a use case that is common across all age ranges. Two-thirds of users saying voice saves time when sending a message, setting an alarm or creating a shopping list.

- Millennials are starting to **expect** that they can carry out tasks using voice. As this group grows older, it’s likely they will continue using voice, securing the future of the tech. They will expect to be able to find information about your brand via voice.

- Young people also **aren’t afraid** to try out the tech. They are happy to experiment and adopt new ways of doing things, particularly if it saves time and effort.

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**Percentage of people using voice activated technology to automate tasks and save time**

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<thead>
<tr>
<th></th>
<th>At least occasionally</th>
<th>Never</th>
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</thead>
<tbody>
<tr>
<td><strong>Percentage</strong></td>
<td>62%</td>
<td>38%</td>
</tr>
</tbody>
</table>

*ETQ: Thinking about how you currently use voice activated technology. Which, if any, of the following do you use voice activated technology for?*

*Base sizes: Current users: n=558 © Vixen Labs Voice Commerce Report 2020 [www.vixenlabs.co](http://www.vixenlabs.co)*
Activating other devices using voice commands is becoming part of every day life, with just under half saying they use voice to control IOT (Internet Of Things). This makes everything from boiling the kettle to switching the light off just a voice command away.

Voice is also being used to cut out channel hopping. 4 in 10 people are using voice to control their TV removing the need to flick through pages of programmes and channels to find the next episode of Bake Off.

People are getting to grips with using voice around the home. The hands-free, time-saving nature of voice serves busy families. These are the users who will continue to harness the benefits of voice technology, ensuring usage growth into the future. With them will grow the expectation of being able to access, create and control via voice.
40% OF USERS SAY THEY’RE CONCERNED ABOUT PRIVACY OF DATA WHEN USING VOICE APPS

// Vixen Labs Voice Commerce Report 2020
// BARRIERS TO USE

Privacy of data and accuracy are two key reasons given for people not using voice. Older users and those living alone are the ones most concerned over what happens to their data. One third of all users say privacy concerns would prevent them from using voice-activated tech in the future.

Younger age groups appear less concerned with privacy and are more worried with lack of accuracy. People aged 18 to 24 say being unable to find what they are looking for via voice, or hearing an error message is more of a problem to them, than data protection.

Despite concerns, there is a healthy appetite for growth of voice-activated tech. This is particularly evident in the 18 to 34 year old user groups and among parents.

During the Covid-19 pandemic the ability to carry out tasks without tapping and touching screens, has become an even more desirable experience. It's seen general usage figures for voice skyrocket and our research shows people are likely to sustain, and even build, on this usage into 2021. In fact 90% of users say they will use voice the same amount or more over the next 12 months.
FINANCE

- 47% of people are researching finance-related products and services using voice.
- 25 to 44-year-olds are most likely to use voice tech to support their banking and finance related activities.

Financial product information can be complex. Often information about credit cards, mortgages and life insurance is packaged up in a series of pamphlets.

Voice removes the overwhelming task of wading through the pages to find the information that’s needed. By creating conversational experiences, the information can be found more easily and acted upon swiftly.

Financial services should take action now to make their wealth of expertise and information easily accessible via voice.

Likelihood of current users using voice activated technology to make a finance-related purchase

- 20% Definitely will
- 22% Quite likely
- 8% Not very likely
- 31% Neither likely nor unlikely
- 20% Definitely won’t

F3_A: Now we’d like you to think about how you might use technology in the future to manage your day to day finances. Thinking about banking and finance related activities in the future, how likely do you think you would be to use voice activated tech to do each of the following? Make a purchase

Base sizes: Male (n=488), Female (n=512), 18-24 (n=134), 25-34 (n=167), 35-44 (n=156), 45-54 (n=173), 55-64 (n=173), 65+ (n=224). Parents with under 10’s (n=153), Parents 10-17’s (n=150), Empty nesters (n=229), 55+ living alone (n=113). Current users (n=558), Non-users (n=442), Not accurate enough* (n=54), Don’t Trust or Privacy Concerns (n=264) * sub base is small, % indicative only

© Vixen Labs Voice Commerce Report 2020
How likely do you think you would be to use voice activated tech to research a finance-related product or service?

- Definitely will: 13%
- Quite likely: 34%
- Neither likely nor unlikely: 21%
- Not very likely: 16%
- Definitely won't: 17%

“Rather than leafing through 17 pages of a pamphlet to find out key information about a bank account, or making a decision around what card to have or what type of financial product to take out for your mortgage - you can go straight to a conversational experience to get the information quickly and easily in a way that’s digestible, just for you.”

Jen Heape, CCO Vixen Labs

F3_A: Now we’d like you to think about how you might use technology in the future to manage your day to day finances. Thinking about banking and finance related activities in the future, how likely do you think you would be to use voice activated tech to do each of the following?

Base sizes: Nat Rep (n=1,000) © Vixen Labs Voice Commerce Report 2020 www.vixenlabs.co
RETAIL

- 30% of users are making retail purchases via voice.
- 49% of users are researching products via voice – asking questions about price, availability and functionality.

Retail-based voice experiences offer an on-demand service. You can order, quickly and easily with a single command as and when you need.

People are creating shopping lists by voice and the next step is purchase. Product information must be optimised for voice so users can hear and make decisions in a screen-free voice-first environment.

The need for purchasing without leaving home has never been greater than mid-pandemic 2020. **Retailers need to make sure their products can be purchased via voice.**
How likely do you think you would be to use voice activated tech to find a location or opening times of a retail store?

- Definitely will: 16%
- Quite likely: 37%
- Neither likely nor unlikely: 21%
- Not very likely: 13%
- Definitely won't: 14%

“Voice gives us the opportunity to talk to our customers at a time that suits them. Always-on voice-activated devices, can take the strain off customer services; answering frequently asked questions and dealing with day-to-day queries.

“Offering location and opening times via voice is just the start of personalising a retail experience by using conversational tech.”

James Poulter, CEO Vixen Labs
ENTERTAINMENT

A quarter of all people surveyed say they would book tickets through a voice experience.

7 in 10 people listen to music via a voice activated device, that’s twice as many as those in the 65+ age bracket.

Smart speakers with screens have opened up the world of entertainment via voice. With a single request to a device we can watch our favourite film or hear our favourite song. Voice also removes fiddly UX, opening the world of entertainment to the very young and very old.

Millennials are growing to expect they can control their media by voice. The next step is buying merchandise, booking concert tickets and discovering exclusive artist-related smart speaker content.

Brands in the entertainment sector should act now to make sure content is voice search optimised.
How likely do you think you would be to use voice activated tech to **play music**?

- **30%** Definitely will
- **31%** Quite likely
- **15%** Neither likely nor unlikely
- **10%** Not very likely
- **13%** Definitely won’t

“*Asking a device for a specific track, album or film, is a very personal experience. This is why it is so important to optimise content so people get to see and hear what they are asking for. Error messages are frustrating so polishing metadata, and taking time to optimise content for voice search is important. It can help provide a personalised and satisfying experience for the user.*”

Suze Cooper, Voice Content Strategist Vixen Labs

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F3_B: Now we’d like you to think about how you might use technology in the future to organise your entertainment & Leisure. Thinking about your entertainment and leisure activities in the future, how likely do you think you would be to use voice activated tech to do each of the following?

- Base sizes: Male (n=488), Female (n=512), 18-24 (n=134), 25-34 (n=167), 35-44 (n=153), 45-54 (n=173), 55-64 (n=147), 65+ (n=224); Parents with under 10's (n=153), Parents 10-17's (n=150), Empty nesters (n=229), 55+ living alone (n=113); Alexa users (n=329), Siri Users (n=219), Google Assistant users (n=195), Current users (n=558), Non-users (n=442), Not accurate enough (n=54), Don’t Trust or Privacy Concerns (n=264) © Vixen Labs Voice Commerce Report 2020

In the full report: what’s stopping people booking via voice & who is listening to audiobooks on voice devices? Email vcr@vixenlabs.co to book a free 1:1 consultation discussing our results in more depth.
A fifth of voice device users are asking for menu and pricing information.

Just over half of 25- to 34-year-olds say they’re likely to use voice technology to order a food delivery in future, compared to 35% overall.

The Vixen Labs Voice Commerce Report 2020 found that food delivery was the sector people were most likely to make purchases from.

Ordering food for delivery via voice is an action many voice users in the UK are happy to do. From checking if their favourite food is available to placing an order and making the purchase via voice - people are saying ‘Yes’!

Food outlets should act fast to ensure store details, menus and ordering are available via voice.
How likely do you think you would be to use voice activated tech to book a restaurant reservation?

- **Definitely will**: 6%
- **Quite likely**: 29%
- **Neither likely nor unlikely**: 24%
- **Not very likely**: 22%
- **Definitely won’t**: 20%

“Voice removes the need to call up and listen to the busy tone to place your order, or check boxes on a website. It creates an on-demand service, whether that’s checking the menu, prices or booking a reservation. It can be done in an intuitive way, at the right moment for the customer.”

Tim Last, Executive Producer Vixen Labs

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In the full report: are we ready to make reservations, order ahead of time & search for menu information via voice? Email vcr@vixenlabs.co to book a free 1:1 consultation discussing our results in more depth.
Voice has revealed itself as a natural solution to the problems raised by the Covid pandemic. We now think twice before tapping a shared screen to buy a train ticket - what if we could do that by voice? We want to know if the shop is open and has the item we need before a masked trip out - what if we could ask our voice assistant for the information?

Ensuring your business shows up and is accessible with voice search has never been more pertinent. Consumers are expecting brands to proactively meet their needs and keep them safe in a rapidly evolving world. The checkout experience is undergoing a revolution as significant as the web or mobile.

Voice has shifted from a desire to an expectation. This report focuses on our experience in the home through smart speakers and our personal assistants – smart phones. But it’s no great leap to imagine how voice will start to revolutionise our physical interactions in shops, banks, restaurants and entertainment venues in this new, touch-free world.

Consumers are searching, shopping and making buying decisions via voice – will your brand be there to help them?
“WE ARE MOVING INTO A TECH-CENTRED WORLD AND THAT IS THE FUTURE”
Primary research conducted by research agency Delineate. September 2020
FOR A DEEPER LOOK AT THE FULL REPORT
PLEASE BOOK A 1:1 CONSULTATION

EMAIL VCR@VIXENLABS.CO