



Voice Commands:

CURRENT STATE | October 2018

Strategic Implications

Introduction

Social Lens Research teamed with MocoSpace and Response:AI to conduct an in-depth analysis of current voice command usage.



Social Lens Research developed the overall research approach, analytical plan, and strategic implications.



Mocospace provided access to their community of digitally savvy, diverse, and mobile dominate users.



response:AI offered advance analytics, in-depth user profiles and detailed report generation using their AI powered research and data platform.

TOP AREA OF INQUIRES:

- Voice command usage by activity and location
- Typical devices for voice command usage / functionality (quality) on these devices
- Adoption barriers
- Willingness to listen to audio ads & preferences about ads
- Create subgroups profiles in detail (based on experience with voice commands)

Methodology

The study was fielded amongst the MocoSpace community who are more likely to be diverse, mobile dominant, and connect daily than the general population.

Fielded: August 2018

Final sample size: 999 respondents

Research instrument: Online survey fielded on MocoSpace

Incentive: None

Demographics

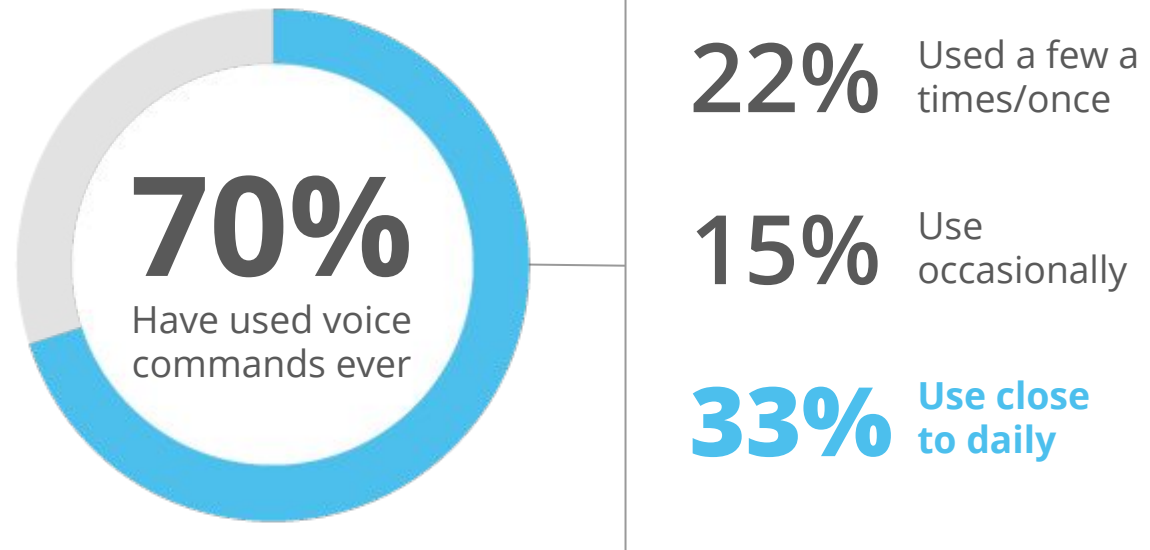
	US Adults	Sample
Ethnicities:		
Non Hispanic		
White	61% ¹	44%
Hispanic	18% ¹	20%
AA	13% ¹	29%

Tech profile

	US Adults	Sample
Smartphone Ownership	77% ²	93%
Connectivity % Go Online Daily	77% ³	98%
Own Smart TV	29% ⁴	34%
Internet Service	65% ⁵	59%
Mobile Only	20% ⁵	38%



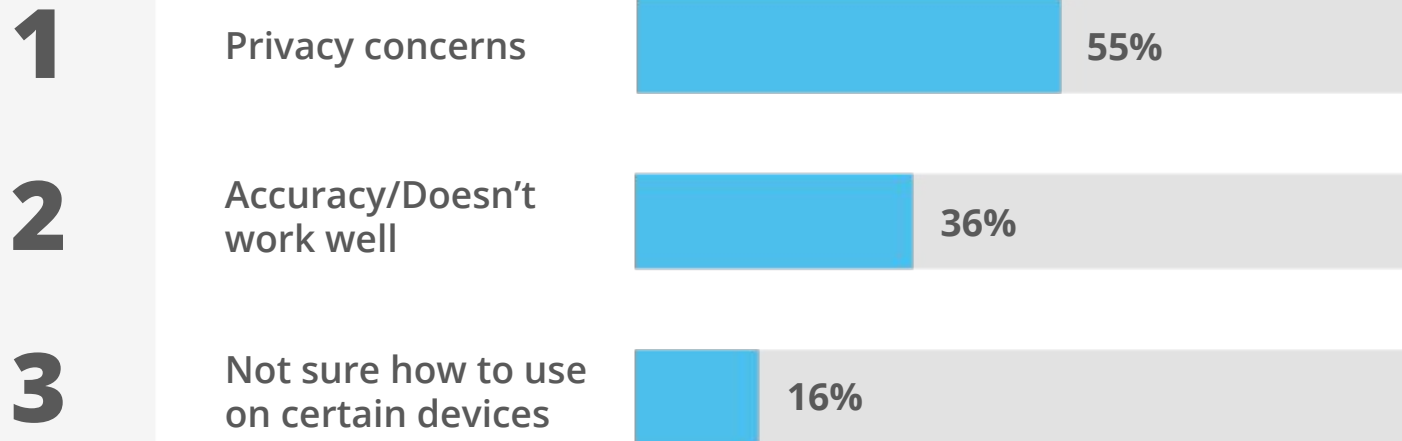
Most users have tried voice commands, but **only 33%** have made voice actions part of their daily routine.





Privacy concerns, poor experiences with voice commands, and know-how gaps are limiting voice adoption amongst current users.

Top Reasons Users Don't Use Voice Commands More Often

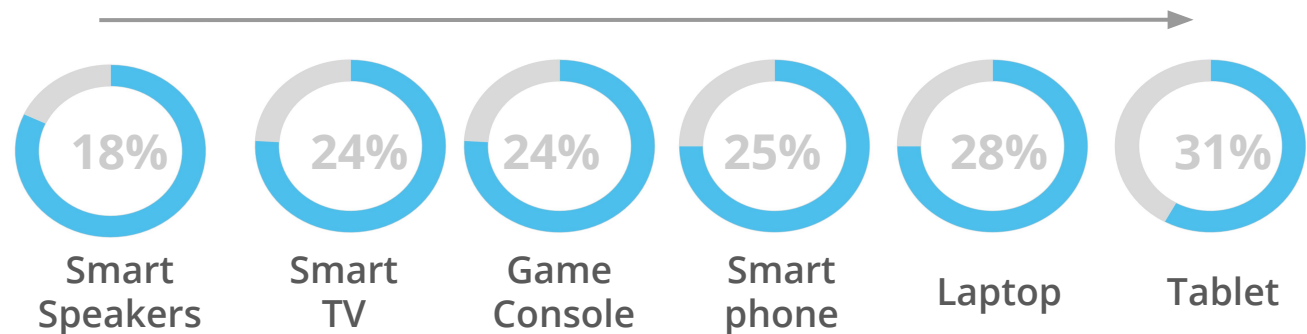




Voice command accuracy issues exist across devices. Smart speakers outperformed other devices. Hispanics and older voice users had significantly more accuracy issues.

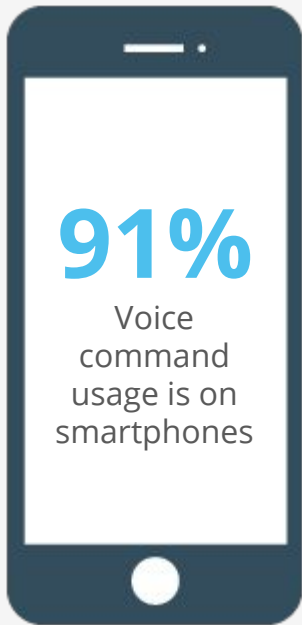
Voice Commands Issues

works only 50% of the time or less





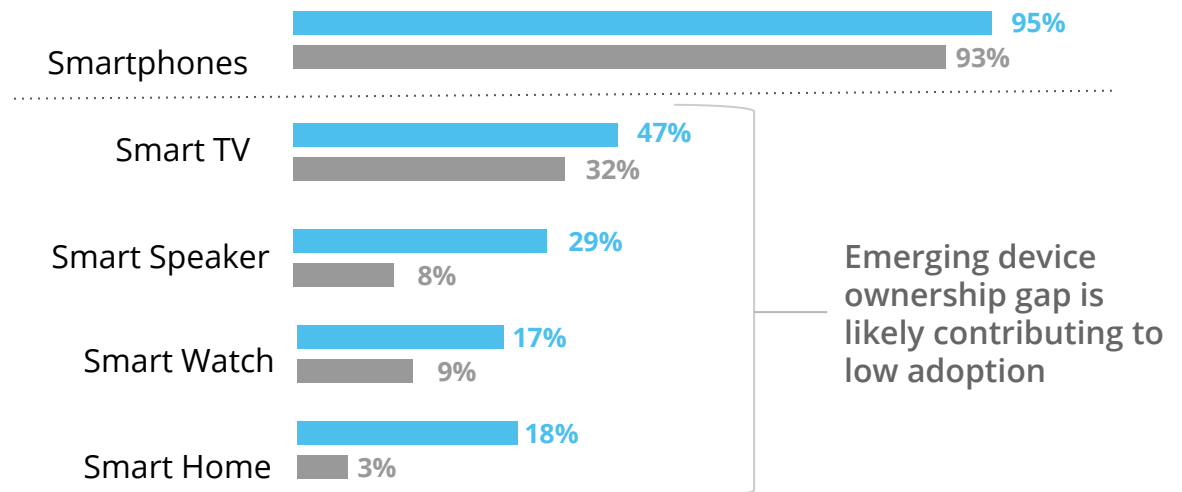
91% of voice command usage is on smartphones. Low ownership of emerging smart devices have partly hindered voice usage. Power users over index on smart device ownerships.



Smart Device Ownership

Power Users = Close to daily

Laggard Users = Tried once/Never used



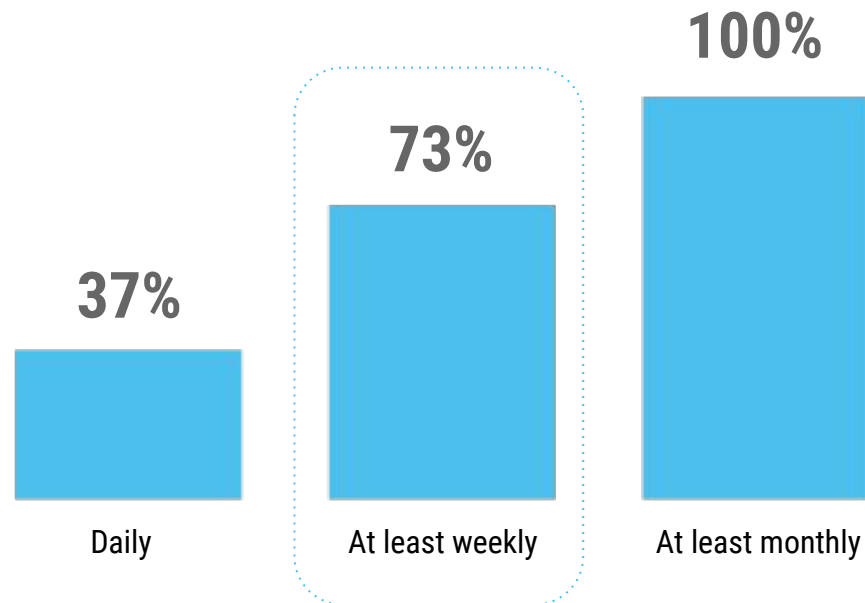
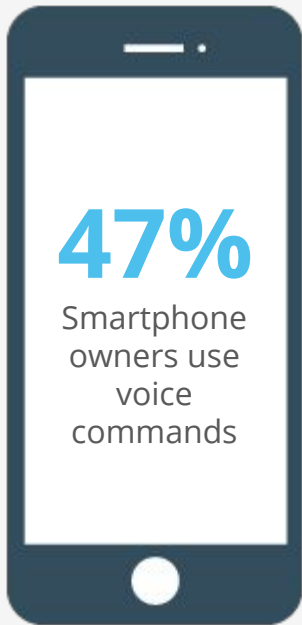
* Internet of Things (IoT) are devices connected to the internet.

Q: I own the following _____ (select all that apply)

Q: I use voice commands on my (insert device) _____



Optimizing for voice on mobile is important. Close to half of smartphone owners use voice commands. Up to 73% of smartphone users use voice at least weekly.





Entertainment, media and local businesses are the most likely to lose out if they don't optimize for voice search now.

Most Common Uses

Get directions	63%
Make phone calls	60%
Listen to music	56%
Find a nearby store	40%
Find a movie/video to watch	36%
Hear weather report	34%
Get store hours	32%
Get news	29%

← Important for
Entertainment,
Media & Local
Businesses



Activities requiring more complex voice experiences are less common. More advanced voice-first applications would likely increase usage.

Less Common Uses

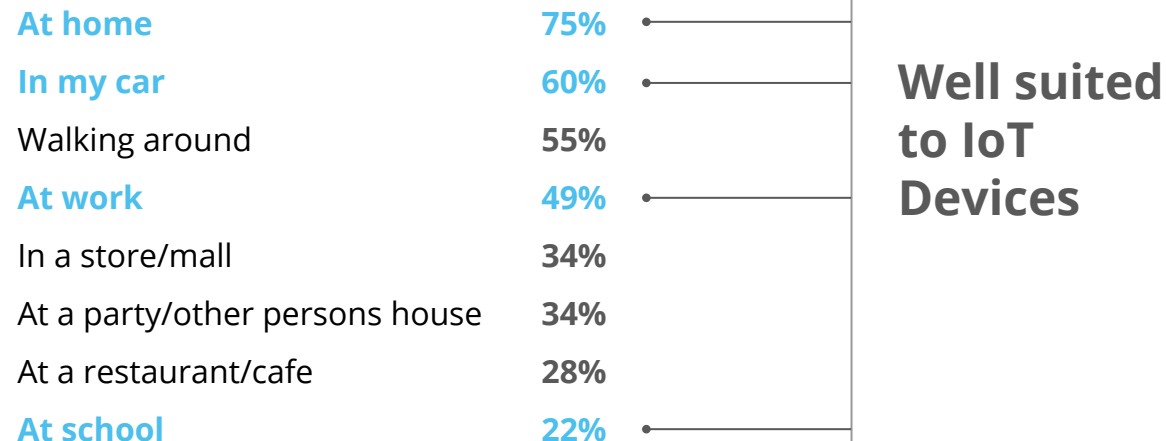
	Do Activity	Top Three
Find a new product	25%	7%
Control smart home	25%	12%
Get a recipe	24%	6%
Control TV	23%	9%
Contact customer service/get help	19%	6%
Get a review for product or service	17%	4%
Price compare	16%	3%
Find a coupon/deal	14%	3%
Purchase a new product	10%	1%
Repurchase a product	8%	1%

Require more complex voice experiences



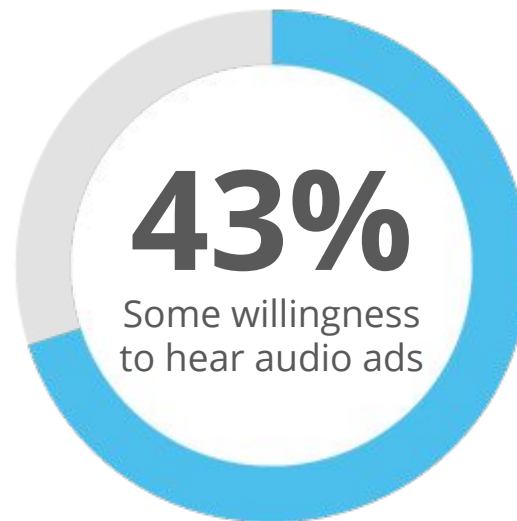
Opportunities exist for more voice-first experiences at home, in the car, at work and at school given the high usage in the those locations and natural fit.

Voice Commands Usage by Location





Some willingness to listen to audio ads exist amongst voice command users. **Personalized, entertaining, free content and offers would increase receptivity to ads.**



What would increase your audio ad attention?

- Personalized 48%
- Funny/Entertaining 46%
- Free Content (movie, game, etc.) 45%
- Timely offer/deal 25%



Power users tend to be educated, diverse moms who are constantly online and own multiple devices. They are more likely to use voice in more places and for more reasons.

Demographics

- **Almost 2X** more likely to be female
- **62%** are parents
- **51%** are multicultural

Tech profile

- **Close to 3X** more likely to own a smartspeaker
- **47%** own a smart TV
- **66%** go online at least hourly

Use Cases

- More likely use voice across locations
(**96%** at home, **81%** in car, **82%** at work)
- **42%** use voice to find a movie
- **45%** use voice to find a store



More than half of power users are multicultural. Multicultural audiences have distinct voice command usage and experiences (accuracy issues, devices used, higher willingness to listen to audio ads).



Non Hispanic White **42%**
African Americans **32%**
Hispanics **19%**
Other **7%**

African Americans

- More likely to use voice for game console (+6% points).
- Heaviest user of voice across locations (at home, walking around, etc.).
- Most open to listening to audio ads.

Hispanics

- Lead on the use of voice for Smart TV (+19% points).
- Face higher rates of voice experience issues. Issues are limiting the use of voice (+10% points).

Key Takeaways



- Most users have tried voice commands, yet only about 33% have made it part of their daily routine.
- Although voice actions are still in the early days, voice commands are a critical part of the mobile experience. Designing a mobile voice experience is important now.
- Entertainment, media and local businesses are the most likely to lose out if they don't optimize for voice search and create compelling voice experiences in the short-term.
- Poor voice experiences, narrow use cases, privacy concerns, and limited IoT device ownership are limiting voice adoption. Fixes to these issues are likely to accelerate the usage of voice commands.
- Given existing high usage and natural fit, opportunities exist for voice-first IoT devices at home, in the car, at work and at school.
- Multicultural moms who are constantly online are the current power users of voice. They are more likely to use voice commands for more activities, across devices and in different locations. Voice experiences that are consistent across devices will likely be important to meet their needs.
- Different audiences will require distinct voice experiences that take into considerations device preferences, locations, and use cases.

Key Takeaways



“Focusing on voice-first experiences is important now. Significant opportunities exist to capture attention and market share with easier to use, robust and higher quality voice experiences. Failure to have a voice strategy will be a major competitive issue within the next five years.”

Julie Diaz-Asper, Founding Partner, Social Lens Research



“Voice commands are on the cusp of being a primary way to interact with all electronics/appliances, search the internet and conduct e/m-commerce. It's important for brands to find their voice-related engagement use cases.”

Tom Dorf, Vice President, MocoSpace



“While voice command usage has not yet become mainstream, multicultural women are leading the way in early adoption of this new technology.”

Ali Mirza, National Account Executive, response:AI.



Request a copy of the detailed
report or a custom briefing [here](#).

Contact:
Julie Diaz-Asper
Founding Partner
Social Lens Research
Julieda@socialensresearch.com