

SEARCH WITHOUT SCREENS:

EXPLORING THE RISE OF SMART ASSISTANTS & VOICE SEARCH



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SURVEY METHODOLOGY & BIAS

Our study polled over 1,000 respondents from February 12-15, 2018. We targeted users of voice-activated assistants among the general U.S. population on the Google Consumer Surveys Publisher Network.

| Bias Table | | | | |
|------------------|-------------------|--------|-------------|------|
| Group | Target Population | Sample | Sample Bias | |
| Male | 47.9% | 54.8% | | 6.8% |
| Female | 52.1% | 45.2% | -6.8% | |
| 18-24 | 13.9% | 9.3% | -4.6% | |
| 25-34 | 19.4% | 17.1% | -2.3% | |
| 35-44 | 17.8% | 20.3% | | 2.5% |
| 45-54 | 18.3% | 18.8% | | 0.5% |
| 55-64 | 16.4% | 19.7% | | 3.3% |
| 65+ | 14.2% | 14.8% | | 0.5% |
| Midwest | 22.0% | 30.6% | | 8.6% |
| Northeast | 18.0% | 15.1% | -1.9% | |
| South | 36.4% | 29.6% | -6.8% | |
| West | 23.6% | 23.7% | | 0.1% |
| RMSE Score: 4.7% | | | | |

HOW ARE TODAY'S CONSUMERS USING VOICE SEARCH?

YOU DON'T NEED TO BE AN ARDENT TECHNOPHILE TO NOTICE VOICE SEARCH PLAYING A MORE ACTIVE ROLE IN PEOPLE'S LIVES.

For many, Apple's Siri was their first introduction to a modern voice-activated virtual assistant. Most iPhone users have likely engaged with her in at least one or two conversations about the weather or where to find the best sushi nearby.

However, voice search is no longer limited to a feature on your smartphone. Devices like Amazon Echo and Google Home are becoming increasingly popular and visible as in-home digital assistants. They respond to spoken commands and queries by answering questions, providing relevant information, and fulfilling tasks by using AI technology.

Consumers have more ways than ever to experience voice search for themselves. But do more options mean more widespread participation? We conducted a Google Consumer Survey to collect data about the portion of U.S. consumers currently using voice-activated virtual assistants. We also gained insight into the specific ways they use voice search, their attitudes toward the technology, and recommendations for retailers, which we'll share in this report.

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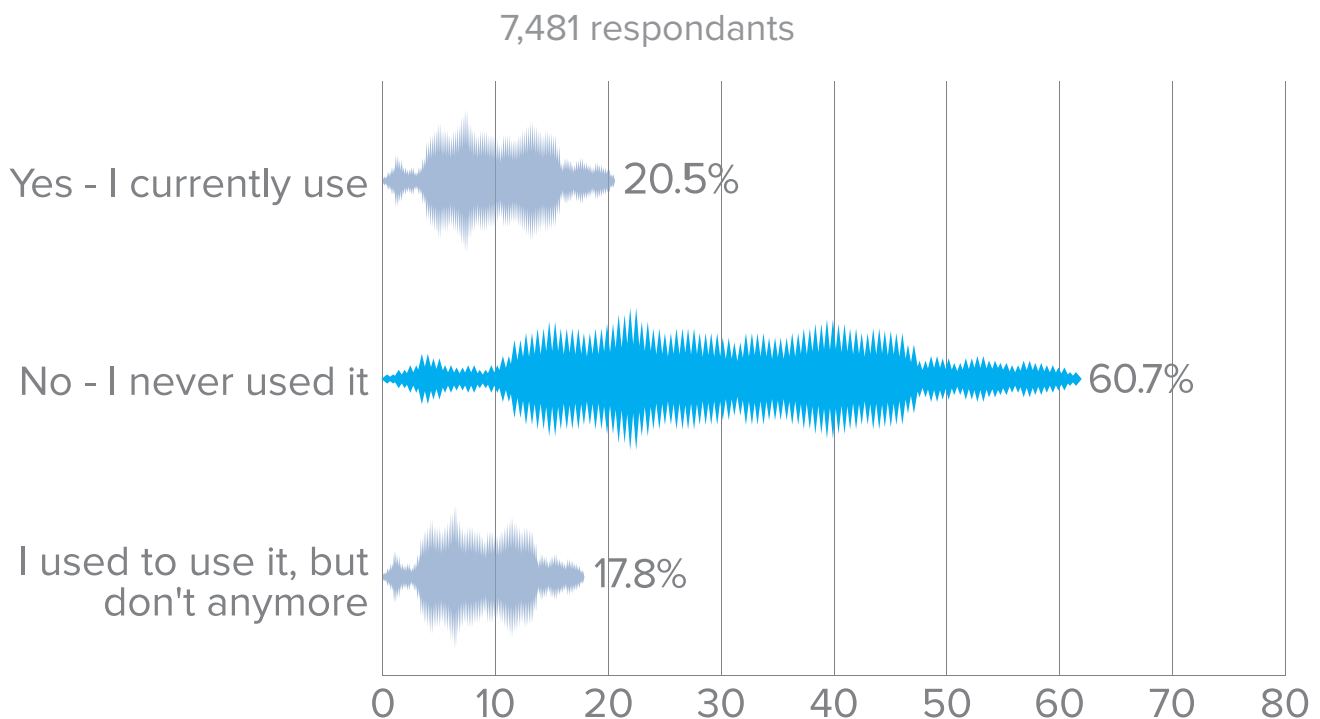
Devices like Amazon Echo and Google Home are becoming increasingly popular and visible as in-home digital assistants.

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QUESTION 1

DO YOU USE A VOICE-ACTIVATED VIRTUAL ASSISTANT, LIKE SIRI, ALEXA, GOOGLE HOME, OR CORTANA?

RESULTS:



OBSERVATIONS:

While they're making clear strides, voice assistants haven't completely caught on with consumers just yet. A significant majority has never used a voice-activated assistant, while just over 20% reported they're currently using one.

Nevertheless, even one in five consumers actively using voice search is a solid figure for a technology that is still largely being introduced to the public. That segment expands to almost 39% when you include respondents who previously used voice assistants

but have since stopped. This resembles data from a recent [Pew Research](#) study, which found that 46% of U.S. adults say they use or have used voice assistants.

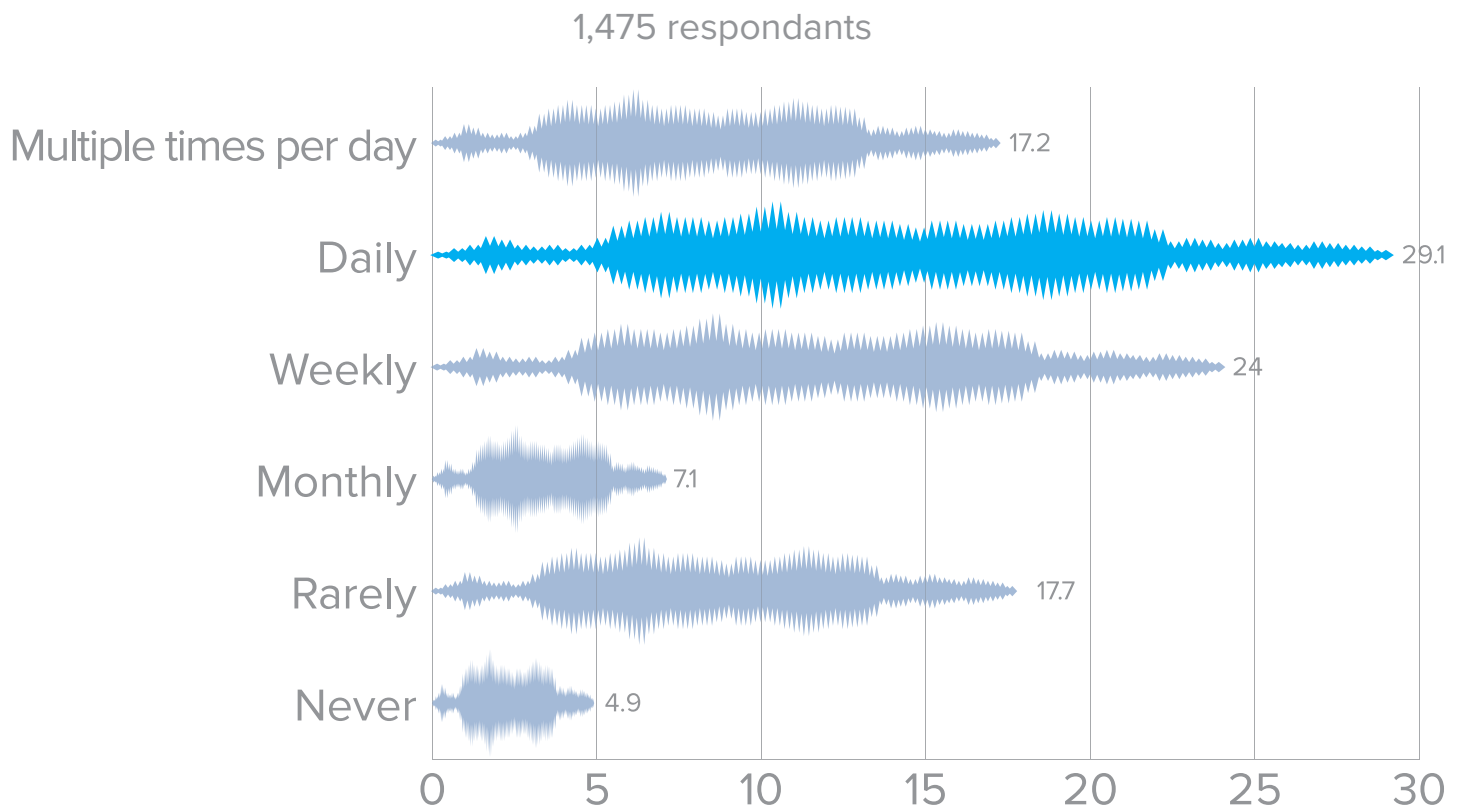
We'd expect these numbers to grow as more mainstream voice assistant devices like Amazon Echo and Google Home make their way into U.S. households.

Next, we'll look at how frequently consumers are using voice search.

QUESTION 2

HOW OFTEN DO YOU USE VOICE SEARCH?

RESULTS:



OBSERVATIONS:

Although a relatively small fraction of consumers are actively using voice search, those who do so are using it regularly. In fact, many appear to be making it part of their everyday routines, with over 46% of respondents stating that they use voice search one or more times a day.

search, it doesn't take much to turn them into an avid user. Initial audience capture may be the most critical part of the process for digital voice assistants. But exactly what types of devices are consumers using to search by voice? Our next question provides some insight.

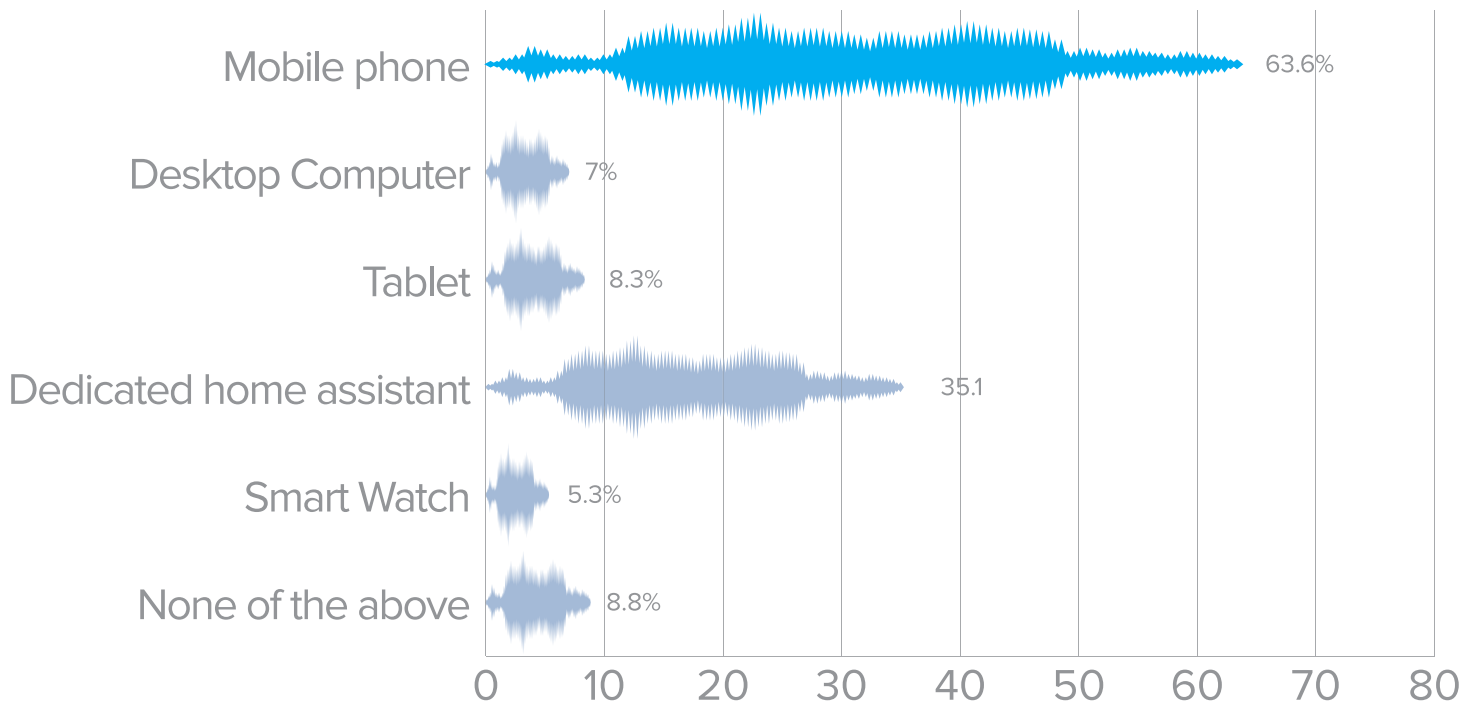
This may suggest that once a consumer adopts voice

QUESTION 3

HOW ARE YOU USING VOICE ASSISTANTS?

RESULTS:

1,860 answers from 1,451 respondents



OBSERVATIONS:

Smartphones are the most popular device among voice search users by a large margin, at nearly 64% of respondents. This isn't entirely surprising, as voice assistants are now natively integrated into many smartphone models. These include Siri on iPhones, Google Assistant on Android devices, and Cortana on Windows Phones. This means there is a massive user base with access to a voice assistant at their fingertips right now. Mobile phones are a natural gateway for many consumers to experiment with and learn more about voice search.

It's also important to note that dedicated home assistants like Amazon Echo are a clear second in our results,

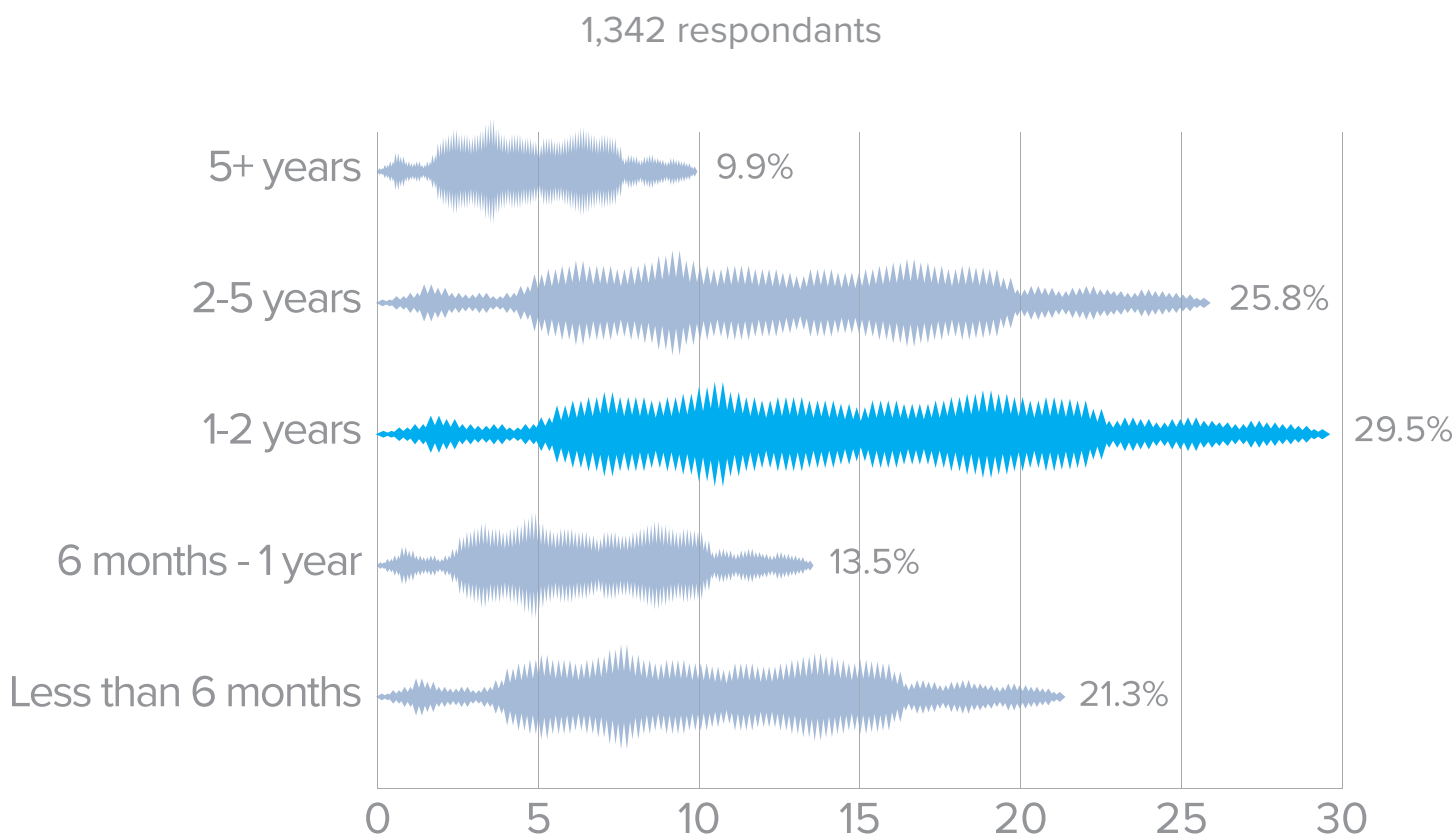
comfortably outpacing desktop computers, tablets, smartwatches, and other devices. When consumers get a taste of voice search on mobile, they appear to be turning to these in-home devices next. If positive sales trends continue, home assistants should break further away from the pack.

We shouldn't underestimate the impact of manufacturing trends, either. Many consumer products and devices are beginning to support built-in smart assistants, from Xbox and Cortana to Toyota and Amazon's Alexa. Integration with products people already use regularly should continue to drive adoption rates.

QUESTION 4

HOW LONG HAVE YOU BEEN ACTIVELY USING VOICE ASSISTANTS?

RESULTS:



OBSERVATIONS:

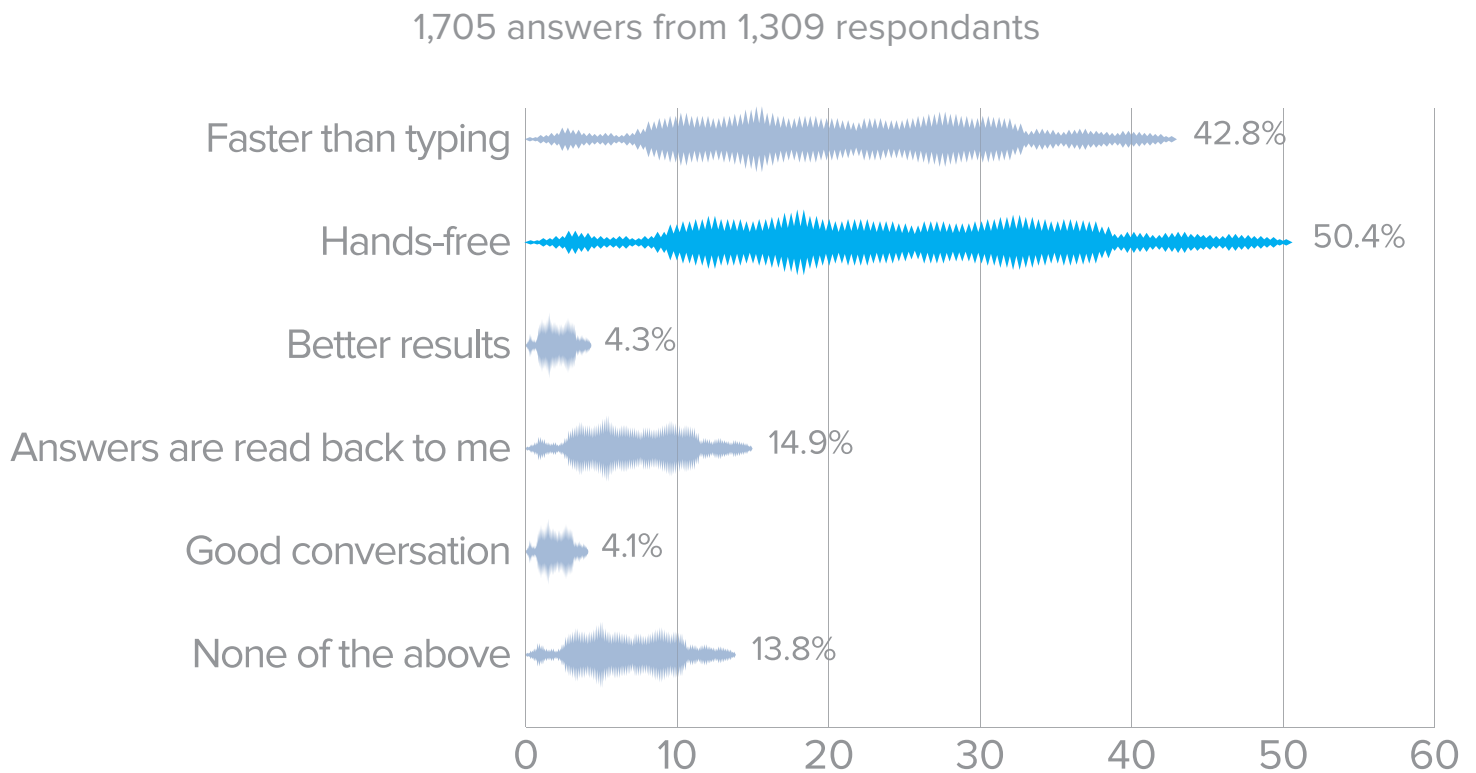
Voice assistants are decidedly still in the early adopter phase as consumers discover and learn about them. 64% of our respondents have been using voice search for two years or less, with just over 21% having started in the last six months. On the other hand, about 37% of those polled have used voice search for more than two years.

As more consumers purchase an in-home digital assistant device, newcomers should continue to make up a large contingent of the user base. However, it will be interesting to see how many recent adopters remain dedicated fans, leading to more seasoned users in the future.

QUESTION 5

WHY DO YOU USE VOICE SEARCH?

RESULTS:



OBSERVATIONS:

Convenience seems to be the strongest factor pulling consumers toward voice search. Over 50% of respondents enjoy the ease of hands-free use, while about 43% appreciate that it's faster than typing. In today's busy, fast-paced lifestyles, manually tapping letters on a screen or keyboard can be a chore. Voice search offers instant functionality using only spoken commands.

Interestingly, nearly 15% of consumers reported that they like having answers read back to them. This could be a significant draw for seniors and the visually impaired as awareness grows. Not having to decipher fine print on a tiny screen would be a genuine benefit for many.

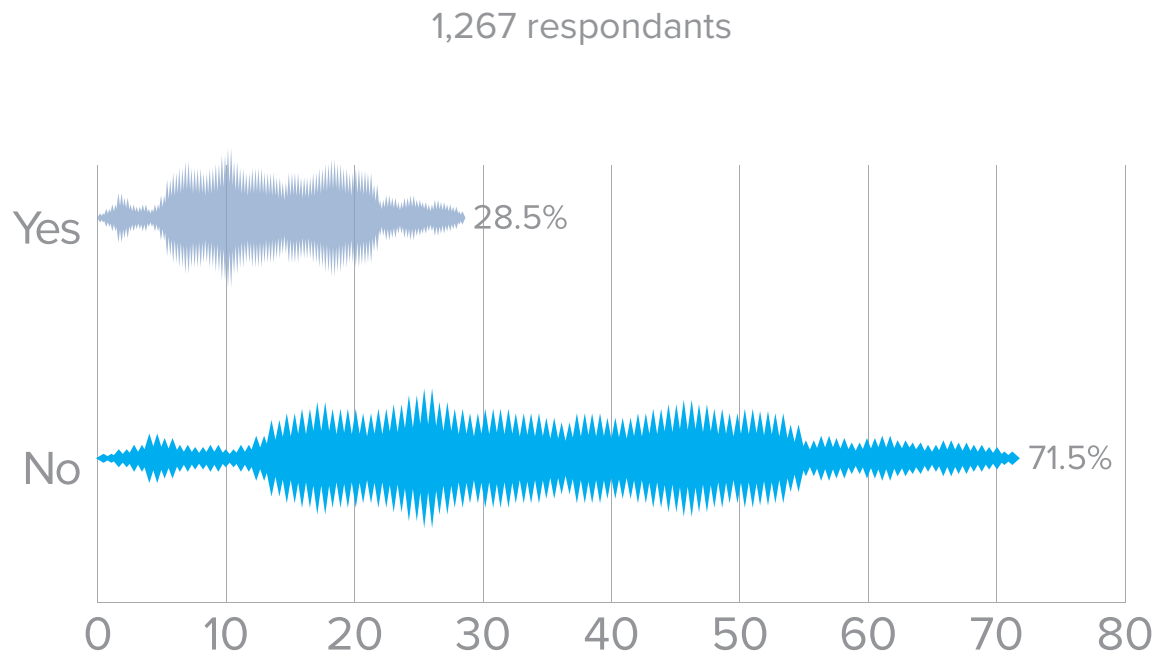
"Good conversation" registered as the least popular response at just over 4%. While this may seem an odd form of appeal to many, it's interesting to note how different brands have used the conversational aspect in promoting their smart assistants. With Siri, Apple has highlighted the potential for witty banter, while Google Assistant has focused more on practical applications. This may signal that consumers are responding more positively to these assistants as everyday aids rather than amusing conversation partners.

(See example ads in References section.)

QUESTION 6

HAVE YOU EVER USED VOICE SEARCH TO FIND INFORMATION RELATED TO A PURCHASE?

RESULTS:



OBSERVATIONS:

Those embracing voice search aren't using it to shop. 71.5% say they have never used voice search in connection to making a purchase, with 28.5% answering in the affirmative. This marks a sharp turn from our findings in a survey we conducted last year, where 51.9% of respondents said they had used voice search to find information related to a purchase.

An influx of new users over the past year may have contributed to this reversal. Since many voice search users are still new to the technology, it's understandable that they may be wary about

incorporating it into their established shopping routines. Consumers need to become more familiar with researching products through voice search.

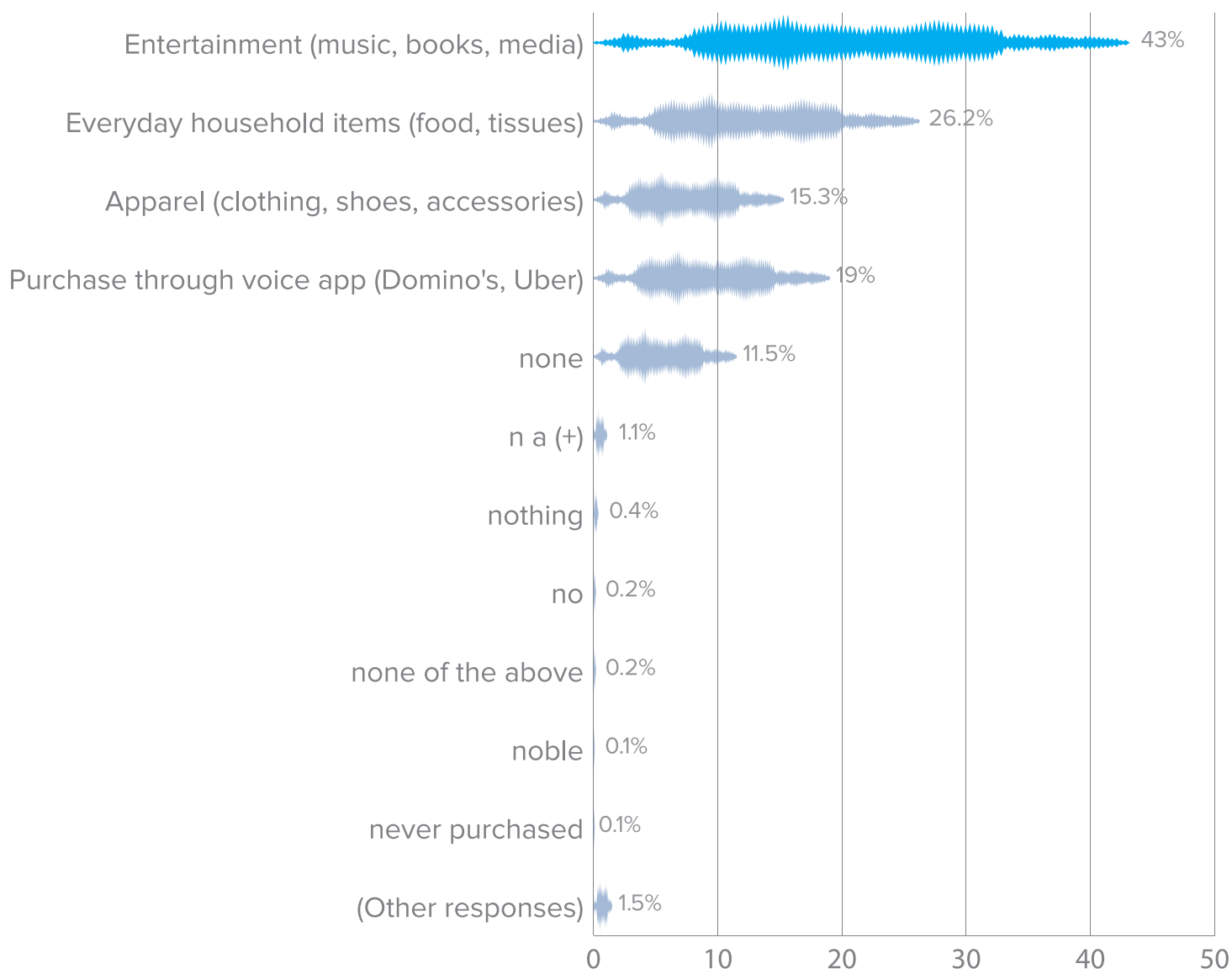
This is why it's so vital for retailers to start thinking about the implications of voice search now before it becomes even more widespread. It's a great time to begin building a foundation and ensuring your products and services are optimized for consumers searching by voice. We'll discuss several strategies at the conclusion of this report.

QUESTION 7

WHAT TYPE OF PURCHASES HAVE YOU MADE USING VOICE SEARCH/VIRTUAL ASSISTANTS?

RESULTS:

1,106 answers from 932 respondents



QUESTION 7

WHAT TYPE OF PURCHASES HAVE YOU MADE USING VOICE SEARCH/VIRTUAL ASSISTANTS?

OBSERVATIONS:

Consumers who are using voice search to make purchases are primarily buying entertainment items such as books, music, and media. Everyday household products like food and tissues are the second most common choice. Overall, these results were nearly identical to last year's survey in terms of order of popularity. Entertainment came out on top, followed by household items, apparel, and in-app purchases.

The two most common purchase categories typically don't require much guesswork on the part of buyers, which may be why they are more comfortable making them with voice commands. They likely already know exactly which movie or snack they want to buy, and there's presumably no distinction between each individual item.

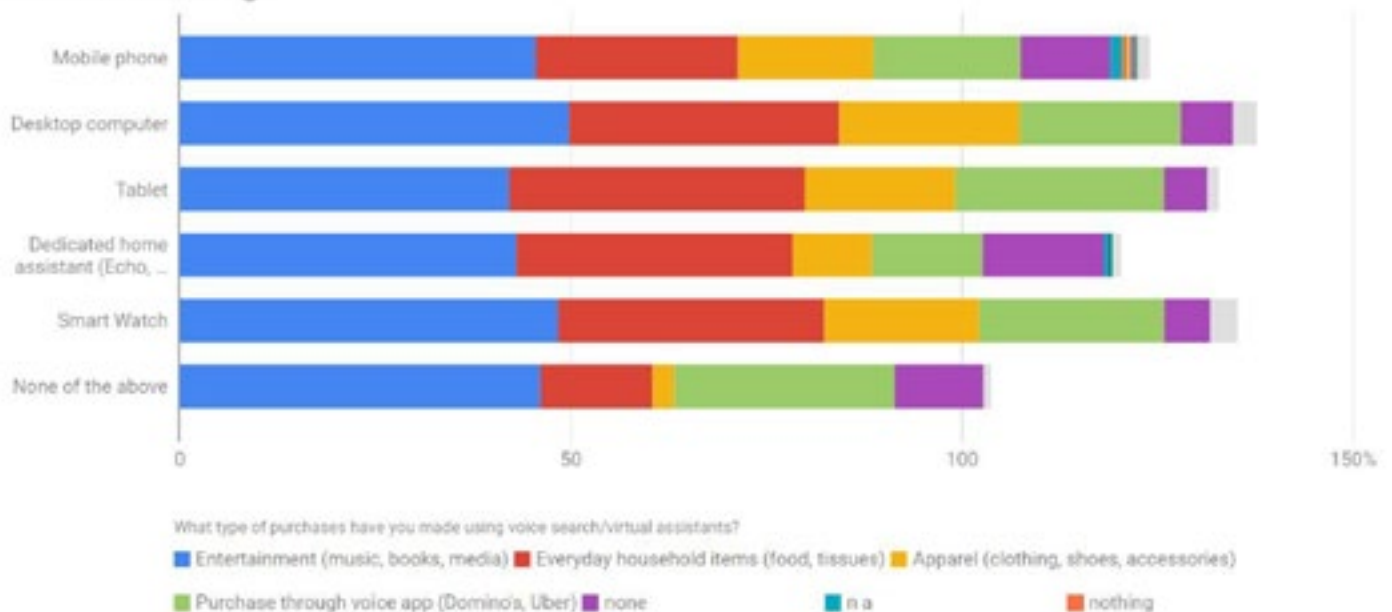
Buying apparel, on the other hand, often relies more on visual confirmation. Consumers may want to try on a piece of clothing before buying it, or at least physically see the item in front of them to verify color, sizing, and other attributes. Doing this without the benefit of a screen may be off-putting for discerning shoppers.

A closer look at our results further supports the notion that a visual display is strongly preferred for purchasing certain items. We saw consumers were more likely to buy apparel on devices with screens (mobile phones, desktops, tablets) than those without, like dedicated home assistants. (See *below*.)

Voice Search Survey - Feb 2018

How are you using voice assistants?

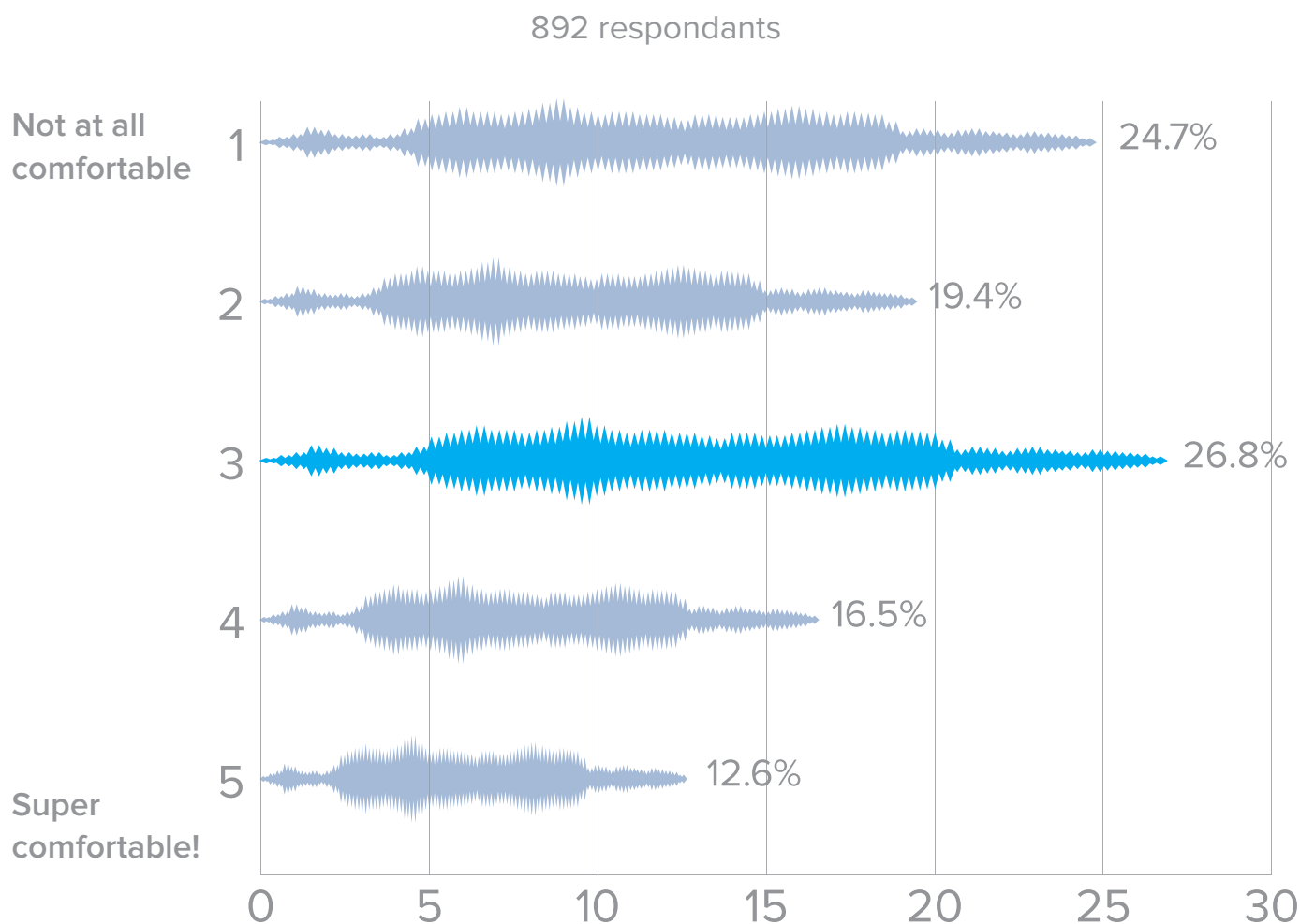
1,349 answers from 810 respondents



QUESTION 8

HOW COMFORTABLE DO YOU FEEL COMPLETING A PURCHASE USING VOICE SEARCH/VIRTUAL ASSISTANTS?

RESULTS:



QUESTION 8

HOW COMFORTABLE DO YOU FEEL COMPLETING A PURCHASE USING VOICE SEARCH/VIRTUAL ASSISTANTS?

OBSERVATIONS:

The majority of consumers admit to being uncomfortable using voice search or a digital assistant to complete a purchase. On a scale of 1 to 5, with 1 meaning “Not at all comfortable” and 5 meaning “Super comfortable,” about 72% of respondents rated their level of comfort at 3 or below. This complements our previous finding that most voice searchers had not used it to look up information related to a purchase.

Recent adoption appears to play a key role here. Many consumers aren’t comfortable buying something with voice search because they simply haven’t been using it for very long. We found that the respondents who were

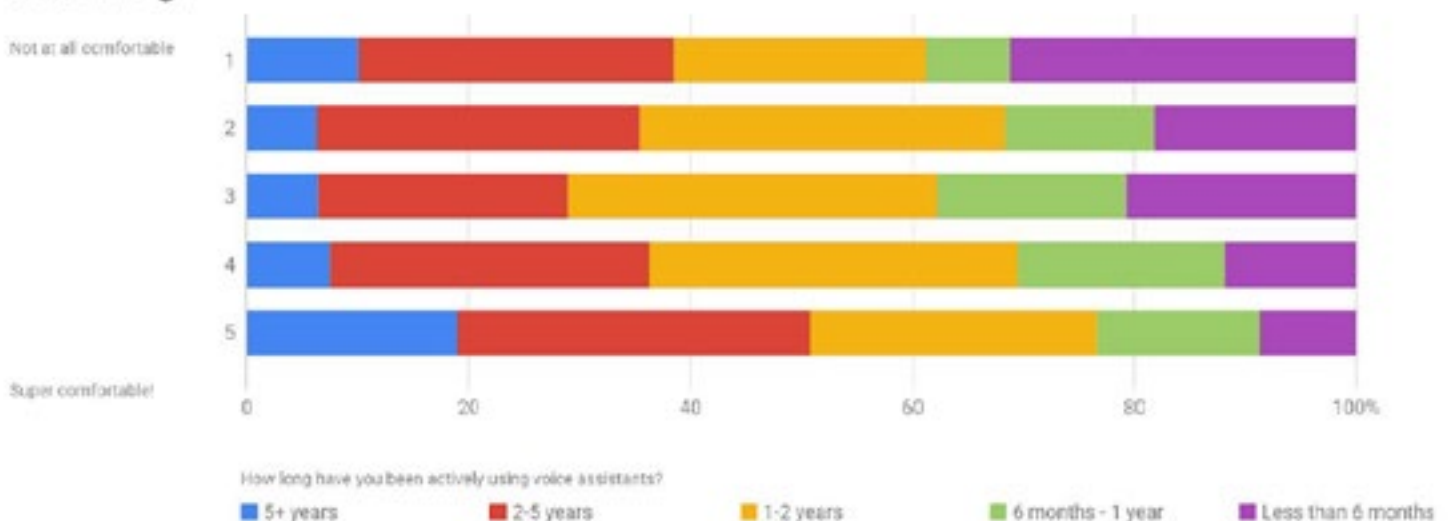
least comfortable making a purchase with voice search were those who had been using it for the least amount of time (less than six months). (See below.)

We can also surmise that consumers remain apprehensive toward ecommerce experiences that have yet to truly optimize for voice search. Retailers are either still figuring out how to incorporate the technology into their business or haven’t even considered it, so browsing and ordering products by voice often comes with various disruptions or is altogether unavailable. For many consumers, it’s preferable to continue with familiar shopping platforms and routines at the moment.

Voice Search Survey - Feb 2018

How comfortable do you feel completing a purchase using voice search/virtual assistants?

810 respondents

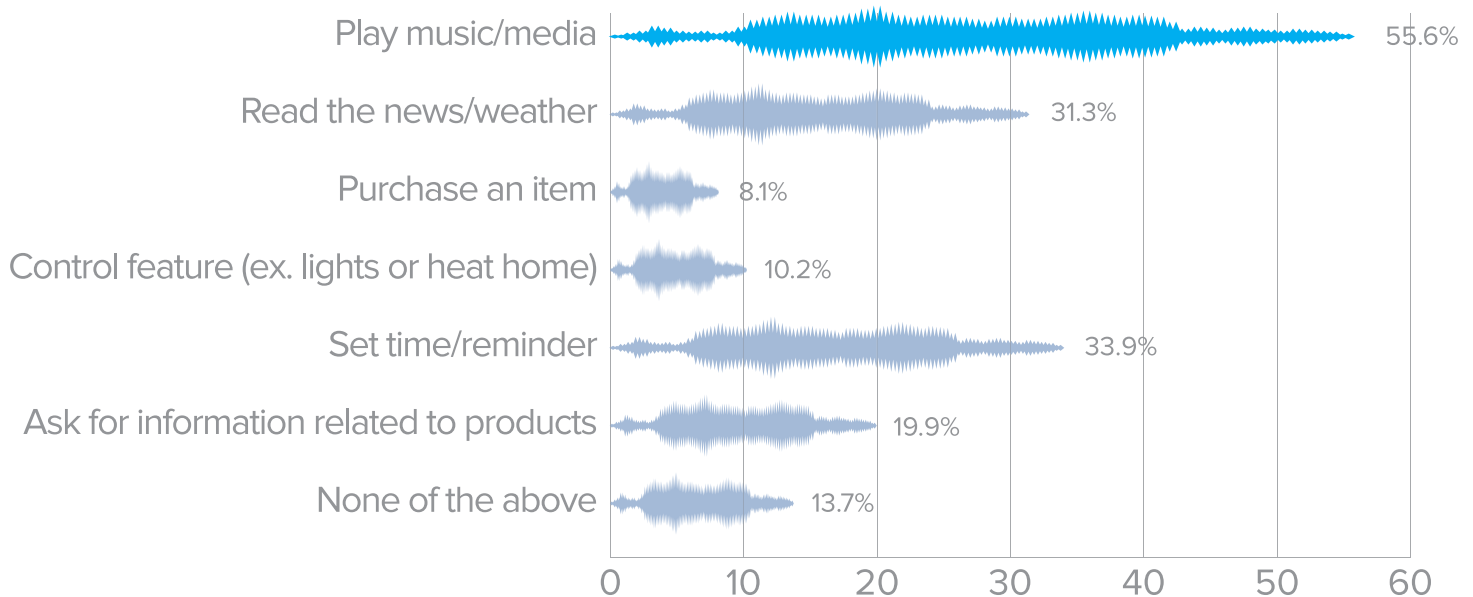


QUESTION 9

WHICH OF THE FOLLOWING ARE THE VOICE COMMANDS YOU USE MOST FREQUENTLY?

RESULTS:

1,492 answers from 864 respondents



OBSERVATIONS:

Smartphones are the most popular device among voice search users by a large margin, at nearly 64% of respondents. This isn't entirely surprising, as voice assistants are now natively integrated into many smartphone models. These include Siri on iPhones, Google Assistant on Android devices, and Cortana on Windows Phones. This means there is a massive user base with access to a voice assistant at their fingertips right now. Mobile phones are a natural gateway for many consumers to experiment with and learn more about voice search.

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We shouldn't underestimate the impact of manufacturing trends, either. Many consumer products and devices are beginning to support built-in smart assistants, from Xbox and Cortana to Toyota and Amazon's Alexa. Integration with products people already use regularly should continue to drive adoption rates.

QUESTION 10

UNDER WHICH CIRCUMSTANCES WOULD YOU WELCOME SPONSORED CONTENT OR ADVERTISED PRODUCT SUGGESTIONS WHILE USING VOICE SEARCH ON YOUR VIRTUAL ASSISTANTS?

RESULTS:

937 answers from 810 respondents



QUESTION 10

UNDER WHICH CIRCUMSTANCES WOULD YOU WELCOME SPONSORED CONTENT OR ADVERTISED PRODUCT SUGGESTIONS WHILE USING VOICE SEARCH ON YOUR VIRTUAL ASSISTANTS?

OBSERVATIONS:

Although we typically think of consumers as resistant to ads in general, nearly 40% of our respondents said they would be receptive to advertised product suggestions or sponsored content while using voice search, as long as they were relevant to their interests. Others were open to ads if they occurred at a clearly defined point in the purchase process, such as researching or asking for advice about a product. Only 7.2% said they would never welcome advertising on voice search.

However, the raw responses to this question told a somewhat different story. We found 129 raw responses that explicitly rejected ads with voice search. These responses tended to be emotional and uncompromising in nature, such as “No conditions - I’ll stop using voice search first.” and “I’m already paying to use the device; do not want sponsored content on top of it.”

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nearly
40% of our
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INSIGHTS AND RECOMMENDATIONS FOR RETAILERS

VOICE SEARCH IS STILL IN THE EARLY PHASES OF MONETIZATION.

Only a select few brands have access to different voice-to-commerce capabilities. However, this certainly doesn't mean businesses should ignore voice search or not consider ways it can benefit their brands. There are strategies you can implement right now to make your website or business stand out to voice search users.

START BY OPTIMIZING YOUR CONTENT TO APPEAR IN FEATURED SNIPPETS ON GOOGLE.

You've surely seen these distinct answer boxes at the top of the SERP in what's referred to as "position zero" on many Google searches. If you ask Google Home a question that would generate a featured snippet on desktop or mobile, the device will respond by reading the snippet itself.

This means that when it comes to voice search, you shouldn't just think about providing a good

answer to your target audience's search queries. Instead, think about providing the best answer. While this may seem daunting, you'll likely find opportunities for your business to take advantage of this. Perform some searches on desktop/mobile related to your brand or industry. Which results in featured snippets do you reasonably believe you can occupy? More enticingly, which don't have a snippet at all?

INHABITING THE COVETED "POSITION ZERO" COMES WITH A FEW EXTRA PERKS ON VOICE SEARCH.

For instance, when the assistant on Google Home reads your content as the response to a query, it will credit your site. It may even send a page link to the user on the Google Home app. (Source: [Search Engine Land](#))

You'll also want to imagine yourself in the shoes of consumers as they use voice search. Think about the types of questions they're asking and, more

“There are strategies you can implement right now to make your website or business stand out to voice search users.”

precisely, how they're asking them. Understandably, a voice search request is carried out differently than a desktop or mobile query. It's more like a conversation than merely typing a few words or phrases into a search box.

Identify the common question phrases that may lead voice search users to your site. A tool like [Answer the Public](#) can be highly useful for this research. Voice search queries tend to be longer through the tail, so think in terms of spoken dialogue and make sure your content always uses natural, fluid language that can be easily adapted for voice responses.

Question phrases also allow you to get a better idea of where users are in the purchase funnel. A person asking "where" is probably further along than someone asking "what" or "who," for instance. (Source: [Neil Patel](#))

MAKING YOUR SITE MORE CRAWLER-FRIENDLY IS A WORTHWHILE INVESTMENT, AS WELL.

Use schema markup and structured data so search engines can more easily organize and classify the information on your site. You have a greater chance of appearing in a voice result if the search engine can quickly pull important details from your page, particularly those relevant to local searches like store hours and address. Consumers are more likely to use voice search when they're looking for something on the go.

VOICELABS PROJECTED THERE WOULD BE 33 MILLION VOICE-FIRST DEVICES IN CIRCULATION BY THE END OF 2017.

(Source: [Alpine.AI](#)) While it's still difficult to predict exactly how voice search will continue to grow and evolve, this is a market of possibilities for retailers. Businesses that prepare now for a potentially voice-first world will gain a significant edge over competitors that wait.

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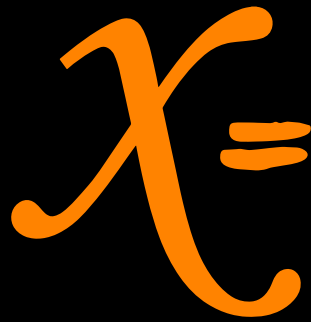


DECODING WHAT MAKES PEOPLE CLICK.

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NetElixir is a specialized search marketing agency that helps global retailers thrive online. We've been in the digital marketing space since a tweet was simply the sound a bird made. Every single day, we combine this unique experience with our never ending passion for creating smarter search marketing solutions to help our clients engage with their customers. And most importantly, drive results that surpass their wildest expectations.

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