

VOICE

AWARENESS, USAGE & ROLE IN THE PATH TO PURCHASE IN USA AND EU



CURRENT USAGE OF VOICE TECH

UNITED STATES



57%

UNITED KINGDOM



60%

GERMANY



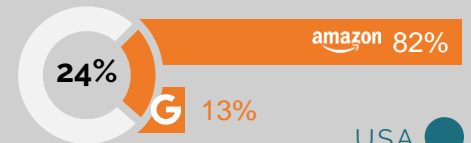
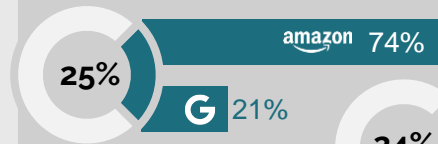
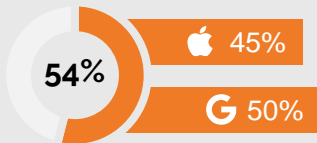
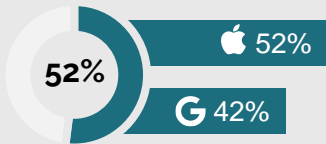
50%

Smartphone

vs

Smart Speaker

VOICE USAGE & PLATFORM PREFERENCES



USA ●
UK ●
GER ●

VOICE USAGE & PLATFORM PREFERENCES

Activity	USA	UK	GER
Find Info	91%	87%	91%
Directions	80%	69%	77%
Weather	74%	71%	78%
Call	76%	69%	73%
Music	94%	95%	95%
Weather	85%	85%	93%
Find Info	79%	80%	86%
Just Fun	80%	81%	81%

People are exploring use of voice and use tends to evolve around doing things **faster** or **easier** and **multitasking**.

Voice in the Path to Purchase

40% of voice users have made at least one purchase via voice



Triggers and Barriers to Voice Purchase

TRIGGERS OF FIRST VOICE PURCHASE

1. Curious to see if it would work
2. Entertaining, fun to try
3. Easier versus other channels



BARRIERS TO VOICE PURCHASE

1. Accuracy of order
2. Sense of difficulty
3. Preference to see product first



Success Factors of Purchasing via Voice

WHEN BRAND ISN'T IMPORTANT



"I think it can be useful, but there are **so many options that I worry that the wrong brand will show up**. We have used it to order paper goods like toilet paper and paper towels. We **don't care if the wrong kind shows up with these.**"



WHEN REORDERING



"I think voice technology to shop is great if you're **re-ordering the same product**. I wouldn't want my voice technology to order me "generic" Tide, when I wanted lavender scented Tide etc., you'd **have to be specific what kind and size you want.**"



WHEN THERE ARE DEALS



"I personally don't use it unless there is a special deal I can only get by using voice. **I have used Alexa for Alexa deals.** For example, getting two packages of dish detergent was \$20 on Amazon, but if I ordered through Alexa, it was only \$12."



Recommendations for Brands

✓ **DO** invest in optimization of products on Amazon and Google Express.

✓ **DO** let the voice of the consumer drive how you interact with them via voice

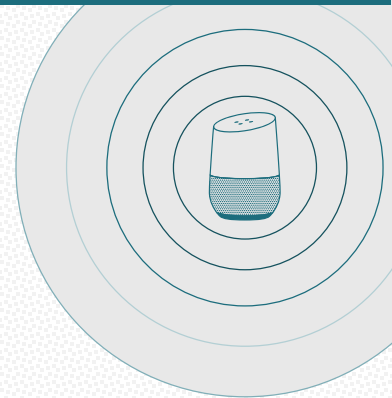
*"I could **ask for customer support through voice** and I would wait for a representative to respond."*

*"I guess I could see if I asked Alexa for help with something, and then **an appropriate company interacted.**"*

✗ **DON'T** interrupt or interfere with ads

*"A lot of extra **advertisements could quickly clog up a useful avenue** for looking up information."*

*"I feel like brands and companies already do enough ads on tv/online and I **don't need MORE ads in my life.**"*



Results based on (1) an online survey conducted in June-July 2018, with a gen pop sample from the US (N=1083), UK (N=726), and Germany (N=772); (2) online bulletin boards conducted in June in the US.

Thank you to our partners:

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