AI CONSUMER INDEX

INTRODUCING THE AI CONSUMER INDEX

DEAR READER,

As CEO of Vixen Labs, I'm excited to present our 2023 Consumer AI Index report, providing key insights into the rapid adoption of Conversational AI. This year's findings point to a seismic shift, with voice assistants and chatbots moving squarely into the mainstream.

Let's start with the headline numbers: over 60% of adults now use voice assistants in the US, UK and Mexico. Nearly half of consumers interact with chatbots daily. And generative AI tools like ChatGPT already have over 50% awareness in the US and UK.

Adoption is accelerating faster than ever. In Mexico, 29% use voice assistants multiple times per day. And 38% of chatbot users in the US are turning to them daily. As familiarity grows, so does utility - with over 50% relying on voice tech for retail and professional services.

Looking ahead, our report predicts some major trends for 2024 and beyond. Voice assistants and chatbots will become assistants we interact with daily. And powered by advances like large language models, they'll evolve from transactional tools into personalized, intelligent assistants.

Businesses will also unlock new opportunities, using Conversational AI to enhance productivity, transform customer service and open up new channels for brand engagement. But to fully capitalize, they must build trust and prioritize responsible AI practices.

With insights from 7,000 consumers across 5 countries, this year's Consumer AI Index provides an unparalleled window into the voice and chatbot revolution. I'm proud to share this definitive view of where things stand today - and where they're headed next. The trends point to a conversational future faster than ever, and it's just getting started.

LET'S DIVE IN!

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

DELINEATE

We are delighted to partner with Vixen Labs to bring you the latest research into the adoption and use of emerging Conversational AI technologies.

The research shows how consumers are eagerly adopting a range of AI channels within the AI ecosystem to support their day-to-day lives. Now, we use AI to search, research, learn new skills, and get assistance organising daily life – Conversational AI has become an integral part of everyday life for many.

The data highlights the meteoric rise of chatbots as a significant new channel for AI users. However, understanding of the technology lags some way behind their use, opening up the potential for consumer concerns to hinder engagement.

We can see trust in chatbots is generally low (although there are variations across markets), and concern around the impact of AI on jobs, alongside governance issues, could impact their future use.

As we look forward, we see an opportunity for brands to take responsibility and be transparent with their customers about how they use and integrate these new technologies to improve interactions, deepen engagement and increase loyalty

JAMES TURNER
CEO & FOUNDER, DELINEATE

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BEHIND THE AI
CONSUMER INDEX 2023

VIXEN LABS

VIXEN LABS

Vixen Labs is the global leader in full-service Conversational AI strategy and design.
We help you revolutionise your connection with customers while delivering real
business value using Conversational AI.
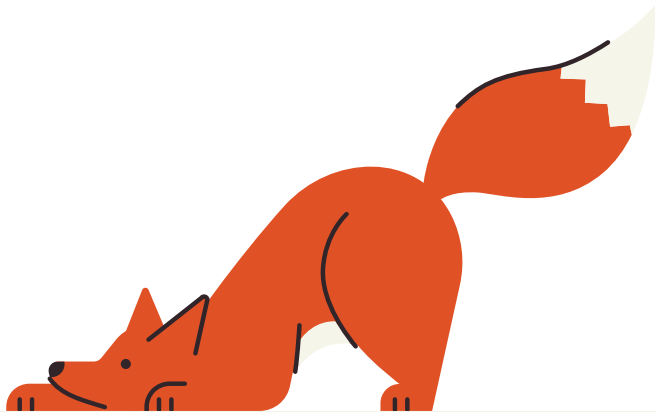
delineate

DELINEATE

Delineate connects world-leading brands with their consumers by delivering live,
accurate and actionable brand and campaign tracking data for faster decision-making.

METHODOLOGY

We conducted the AI Consumer Index in partnership with Delineate.
Working with an independent research firm ensures we deliver high-quality, transparent data that we at Vixen Labs, Delineate and the Open Voice Network (OVON) value so much. In total, 7,000 individuals aged 18+ were surveyed (2,000 in each of the UK, and US, and 1000 in Germany, Australia and Mexico) in September 2023.

The research samples were selected and analysed based on published national statistics, to accurately represent each country's population. The margin of error for the total sample in each country is <+_3%. All survey participants were recruited via consumer panels and then invited to complete the online survey by mobile or computer.
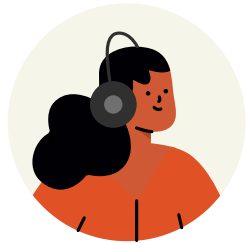
7,000
INDIVIDUALS AGED 18+ WERE SURVEYED

> THIS REPORT – WITH ITS PREDECESSORS – IS ALL ABOUT USAGE, AND IN THAT WAY, IS OF EXTRAORDINARY VALUE TO THE INDUSTRY. THANKS TO VIXEN LABS AND DELINEATE, WE SEE THE GROWTH AND EMERGING MATURITY OF CONVERSATIONAL ASSISTANCE; WE ALSO SEE THE PROMISE OF THE MARRIAGE BETWEEN LANGUAGE MODELS OF ALL TYPES AND SIZES, AND THE NATURAL LANGUAGE INTERFACE.
>
> LET US NOT FORGET, THAT IN A TIME-STRESSED WESTERN CULTURE, CONVENIENCE WILL WIN. EVERY TIME.

JON STINE
EXECUTIVE DIRECTOR,
OPEN VOICE NETWORK

OPEN VOICE NETWORK
Voice worthy of user trust

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.

UNDERSTANDING CONVERSATIONAL AI

The adoption of Conversational AI has been remarkable. It has permeated our lives and is dramatically altering the way businesses function. This report delves into the transformative power of Conversational AI, exploring its impact on business operations.

We aim to provide business leaders and industry professionals with a profound understanding of the role Conversational AI plays in reshaping business operations. We will analyse the findings from the AI Consumer Index, focusing on key takeaways and insights that highlight the rapid adoption and influence of Conversational AI across different markets.

EVOLUTION OF CONVERSATIONAL AI

Conversational AI has come a long way since its inception. From simple chatbots to sophisticated voice assistants, the technology has evolved exponentially. Its progression can be attributed to advancements in machine learning, natural language processing, and the advent of large language models like ChatGPT.

CHATBOTS, VOICE ASSISTANTS, AND MORE

Conversational AI encompasses various applications, including chatbots and voice assistants. Chatbots facilitate real-time, text-based conversations with users, while voice assistants operate through voice commands. The versatility of these tools makes them adaptable to a multitude of tasks.

KEY FEATURES AND FUNCTIONS

Conversational AI's capabilities extend far beyond basic interactions. These systems can understand context, provide information, execute tasks, and even simulate human-like conversations. The ability to process and generate human language is at the core of their functionality.

AWARENESS AND USAGE

GENERATIVE AI

Our research demonstrates that generative AI is gaining significant traction. In the US, UK, and Australia, approximately 25% of adults claim unprompted awareness of generative AI. When prompted with a definition, awareness rises to around 80%, although understanding is more limited, suggesting that the concept is permeating public awareness even without direct prompts.

What's particularly intriguing is the usage statistics. About 33% of US adults believe they have used generative AI tools, with another 23% unsure but inclined towards positive responses. This means that, in less than a year, approximately 50% of adults in the US have either used or believe they have used generative AI tools. This rapid adoption highlights the growing significance of generative AI in daily life.

Moreover, two in five individuals in these markets express confidence in explaining the concept of generative AI. This indicates a notable level of understanding and comfort with the technology, laying the foundation for broader integration and adoption.

IN LESS THAN A YEAR, 50% OF ADULTS IN THE US HAVE USED GENERATIVE AI.

HOW AWARE ARE PEOPLE OF GENERATIVE AI?

Many adults across each market, with a majority in the USA, Australia and the UK, have heard of the term Generative AI. The majority of adults in each market, when prompted with a definition, have heard of the term generative AI. Furthermore, at least half of the adults in each country claim to have at least some understanding of generative AI.

💬 **QUESTION:**

Given this definition, do you think you have come across Generative AI before?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000

	Understand fully	Some understanding	Do not understand	Not heard
US	20%	41%	19%	20%
UK	11%	40%	27%	23%
GERMANY	15%	43%	22%	20%
MEXICO	19%	36%	19%	26%
AUSTRALIA	13%	45%	21%	22%

■ I HAVE HEARD OF GENERATIVE AI AND UNDERSTAND FULLY WHAT IT IS

■ I HAVE HEARD OF GENERATIVE AI BEFORE AND HAVE SOME UNDERSTANDING OF IT

□ I HAVE HEARD OF GENERATIVE AI BEFORE, BUT DO NOT UNDERSTAND WHAT IT IS

■ I HAVE NOT HEARD OF GENERATIVE AI BEFORE
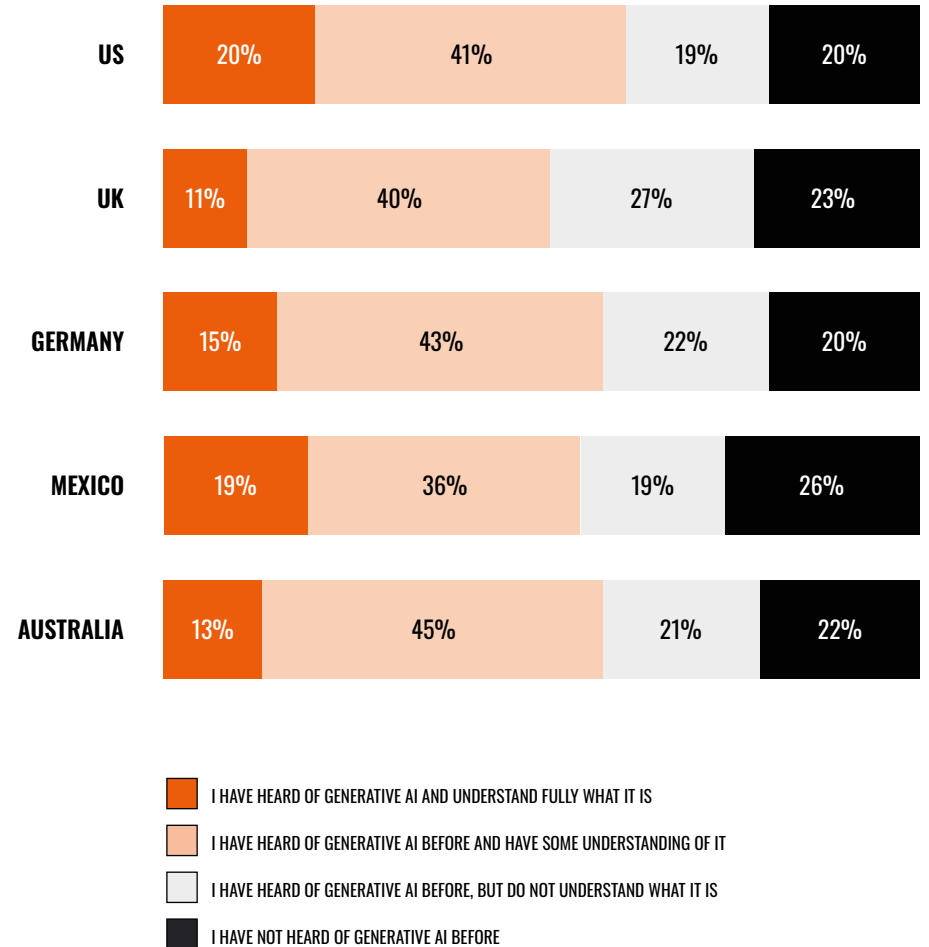
USING GENERATIVE AI

When it comes to using AI for different activities, adults across each country are most likely to use it for watching something on a streaming service that was recommended such as watching, listening or looking at something that was recommended based on previous behaviours.
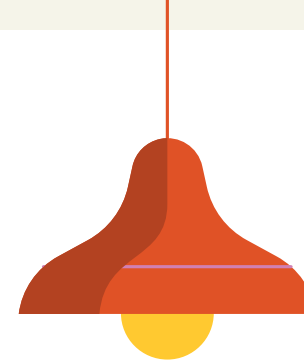
WHICH TASKS ARE PEOPLE MOST LIKELY TO USE GENERATIVE AI FOR?
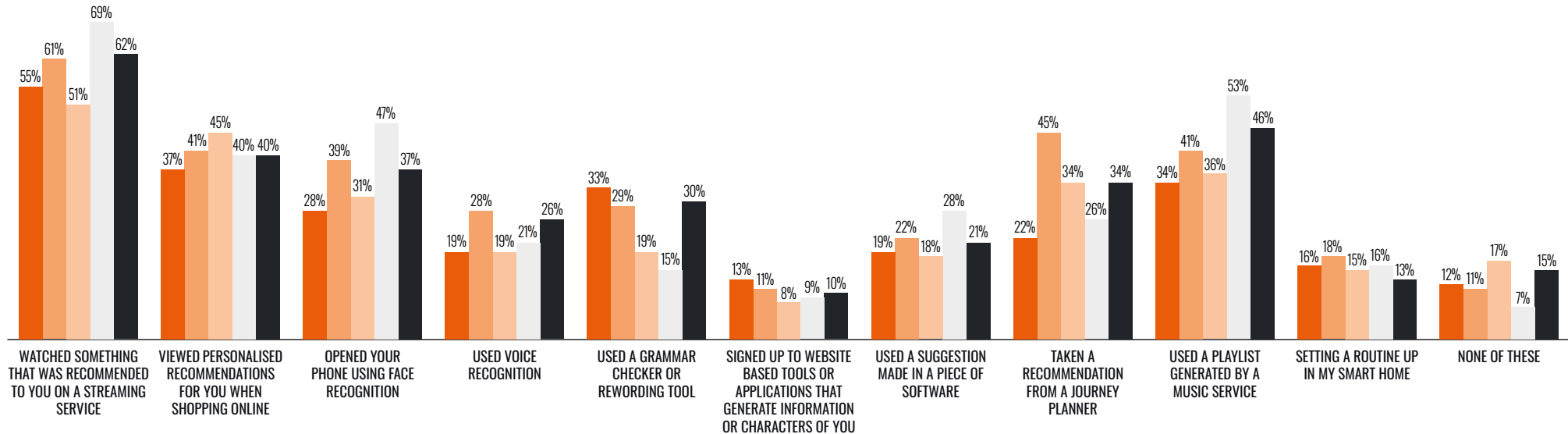
QUESTION:
Which, if any of the following have you ever done?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000

US | UK | GERMANY | MEXICO | AUSTRALIA

AWARENESS AND USAGE

CHATBOTS, CONVERSATIONAL AI AND LARGE LANGUAGE MODELS

Chatbots have emerged as a significant channel in the Conversational AI ecosystem. Our findings reveal that ChatGPT leads the way in awareness among chatbots, closely followed by Bing from Microsoft and Google Bard. This demonstrates the influence and recognition of ChatGPT, particularly in the English-speaking markets.

HOW AWARE ARE PEOPLE OF CHATBOTS?

In terms of chatbots, ChatGPT has the highest overall awareness across each market, although people in Mexico are slightly more likely to be aware of Google Bard compared to ChatGPT.

	US	UK	Germany	Mexico	Australia
ChatGPT	42%	42%	44%	31%	48%
Bing Chat	23%	15%	16%	14%	13%
Google Bard	24%	19%	19%	38%	22%
Perplexity AI	7%	4%	3%	3%	2%
Claude	6%	4%	4%	3%	3%
MyAI	14%	16%	9%	9%	13%
Microsoft Copilot	11%	9%	11%	17%	7%
Pi	7%	5%	4%	5%	2%
Other	3%	2%	2%	4%	1%
None of the above	31%	37%	38%	31%	36%

US **UK** **GERMANY** **MEXICO** **AUSTRALIA**

💬 **QUESTION:**

Which, if any, of the following chatbots have you heard of?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000
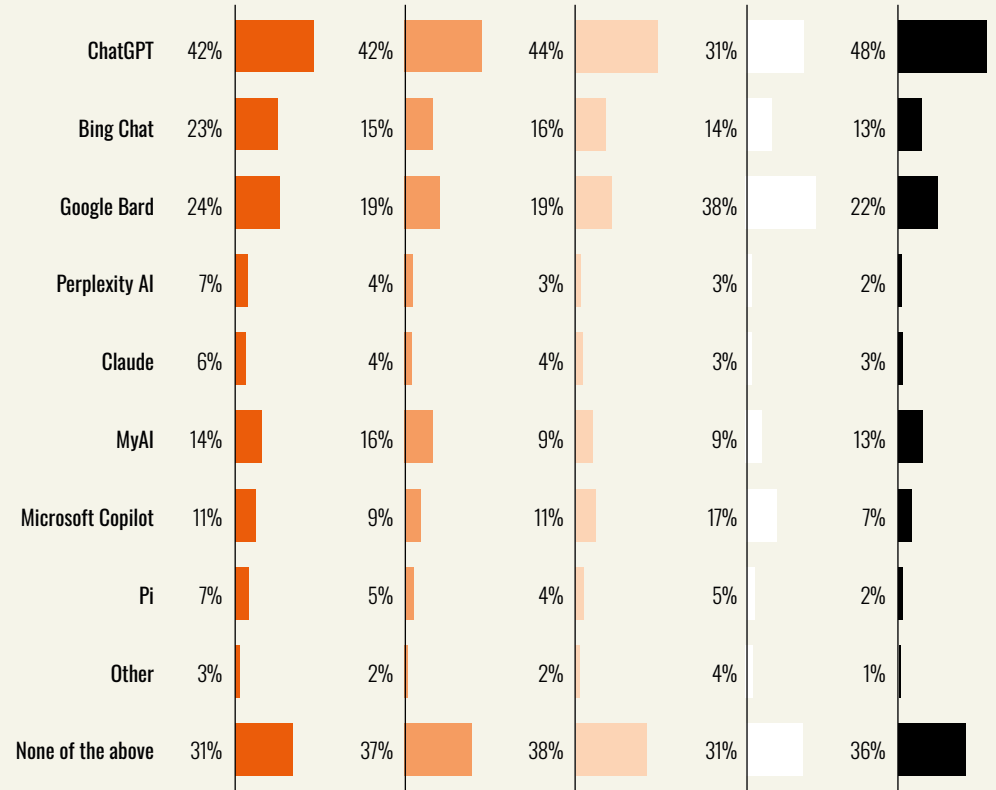
HOW AWARE ARE PEOPLE OF CONVERSATIONAL AI?

People across each market showed a general awareness of conversational AI, although those in Germany showed the lowest familiarity with the technology.

Country	I'M VERY FAMILIAR WITH IT	I'M QUITE FAMILIAR WITH IT	I'M A LITTLE FAMILIAR WITH IT	I'VE HEARD OF IT BUT DON'T KNOW ANYTHING ABOUT IT	I'VE NEVER HEARD OF IT
US	16%	17%	31%	22%	14%
UK	10%	21%	32%	24%	13%
GERMANY	7%	14%	31%	36%	12%
MEXICO	10%	14%	34%	26%	16%
AUSTRALIA	9%	20%	36%	22%	13%

Legend:
- ■ I'M VERY FAMILIAR WITH IT
- ■ I'M QUITE FAMILIAR WITH IT
- ■ I'M A LITTLE FAMILIAR WITH IT
- ■ I'VE HEARD OF IT BUT DON'T KNOW ANYTHING ABOUT IT
- ■ I'VE NEVER HEARD OF IT

💬 **QUESTION:**

Which of the following best describes how familiar you are with Conversational AI e.g. customer service chatbots?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000
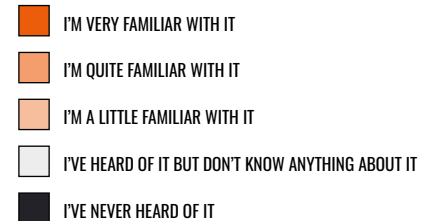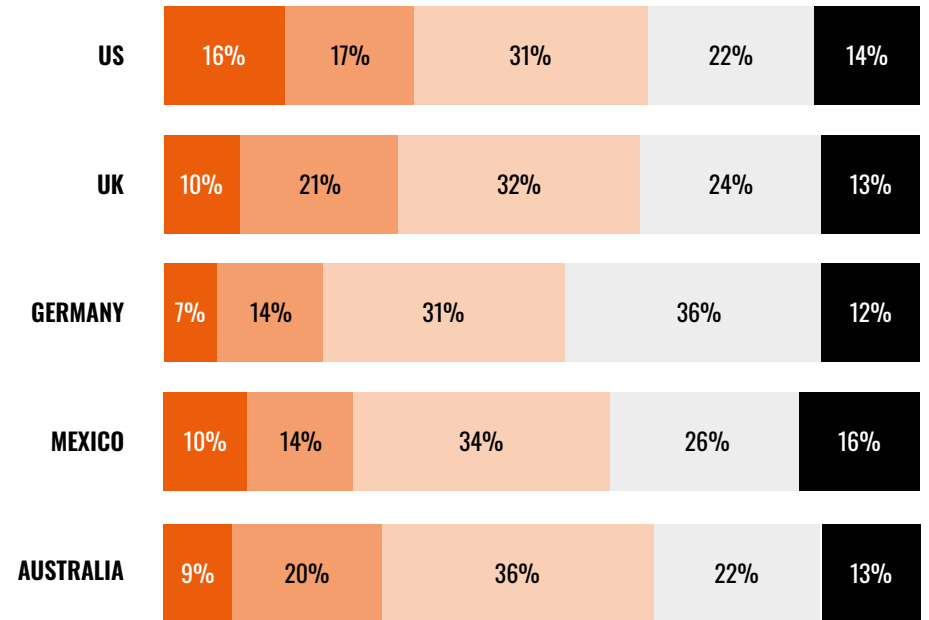
WHAT TASKS ARE PEOPLE MOST LIKELY TO USE CHATBOTS FOR?

In each market, current users are learning new things, creating content and searching/researching things when using a chatbot. However, making purchases and researching things to buy are the least likely tasks to be performed using a chatbot, suggesting some resistance to using them where personal and financial details may be needed.

Chart — percentages by country for each task:

TO SEARCH FOR OR RESEARCH THINGS ONLINE: 37% (US), 41% (UK), 39% (Germany), 57% (Mexico), 45% (Australia)

TO HELP WITH ORGANISING AND MANAGING MY LIFE: 30% (US), 24% (UK), 33% (Germany), 25% (Mexico), 31% (Australia)

ENTERTAINMENT (SEARCHING FOR AND PLAYING CONTENT): 33% (US), 27% (UK), 28% (Germany), 28% (Mexico), 21% (Australia)

TO RESEARCH THINGS TO BUY: 36% (US), 27% (UK), 31% (Germany), 18% (Mexico), 29% (Australia)

MAKE A PURCHASE E.G. PRODUCT OR SERVICE: 30% (US), 28% (UK), 16% (Germany), 22% (Mexico), 18% (Australia)

LEARN NEW THINGS: 42% (US), 42% (UK), 41% (Germany), 54% (Mexico), 46% (Australia)

CREATE CONTENT E.G. TEXT, MUSIC, ART: 36% (US), 34% (UK), 36% (Germany), 37% (Mexico), 35% (Australia)

OTHER: 5% (US), 6% (UK), 5% (Germany), 5% (Mexico), 7% (Australia)

MAKE A PURCHASE E.G. PRODUCT OR SERVICE: 3% (US), 2% (UK), 2% (Germany), 1% (Mexico), 4% (Australia)

💬 **QUESTION:**
Which, if any, of the following have you ever done?
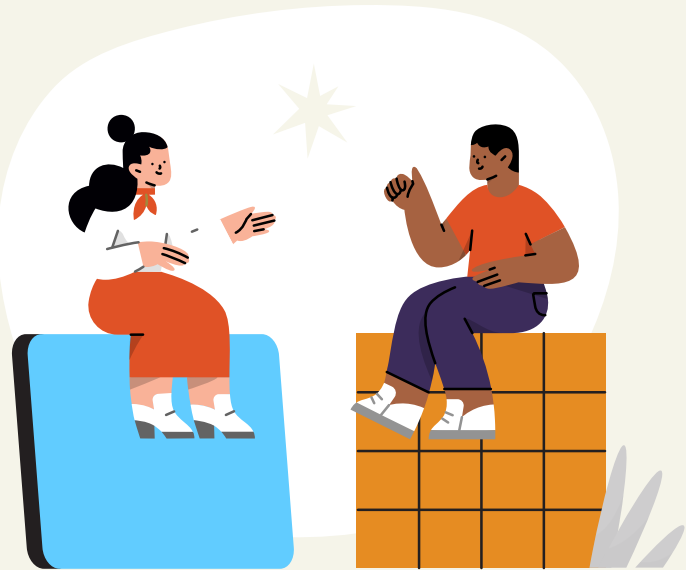Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000

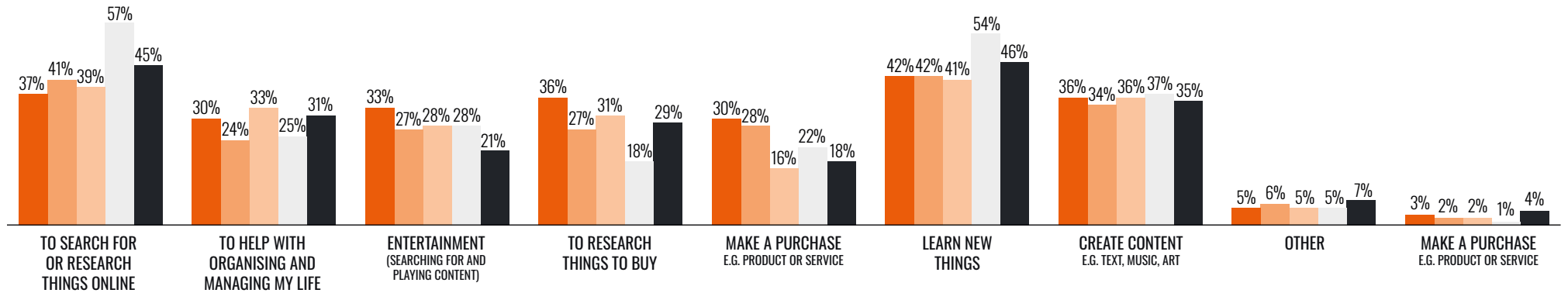Legend: US | UK | GERMANY | MEXICO | AUSTRALIA

HOW AWARE ARE PEOPLE OF LARGE LANGUAGE MODELS?

The majority of adults across the countries remain unaware of Large Language Models (LLMs), despite their fundamental place in the wider AI ecosystem. Awareness is highest in the US at around 30%, but falls to less than 20% in the other countries. Among those who have some level of awareness, US adults are the most confident in being able to explain what a LLM is, with adults in Mexico least confident.

8%	8%	10%	20%	8%
29%	18%	18%	19%	14%
US	**UK**	**GERMANY**	**MEXICO**	**AUSTRALIA**
63%	75%	71%	62%	78%

█ YES

█ NOT SURE

█ NO
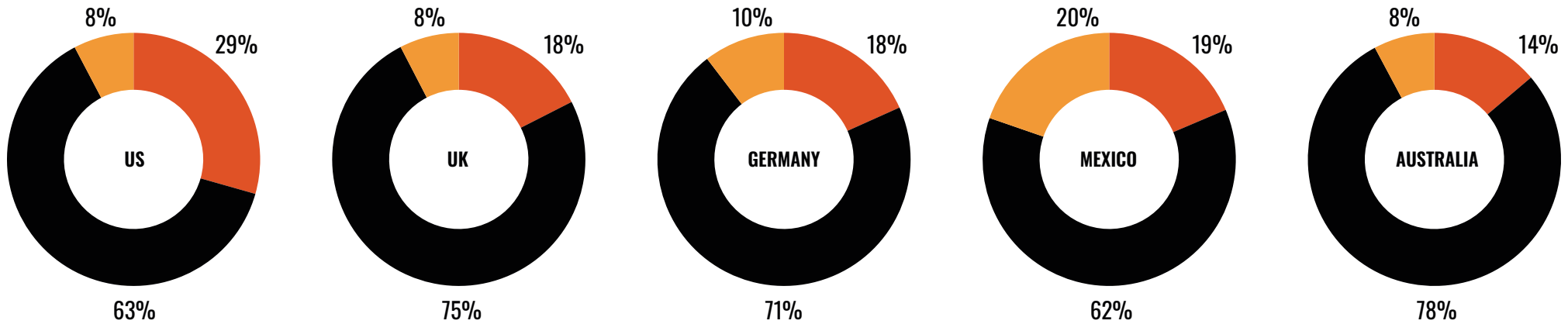
💬 **QUESTION:**

Before today, had you heard of Large Language Models (LLMs)?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000
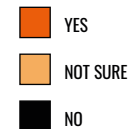
USER RETENTION AND FREQUENCY

User retention and frequency of usage reflect the stickiness of chatbot technology. Our data reveals that approximately 53% of users employ chatbots daily in the US. This high daily engagement rate signifies the chatbot's significance in users' everyday lives.

Additionally, the retention rates are substantial, especially for Google Bard, which displays higher retention across multiple markets.

In the US, ChatGPT remains the leader in user retention. This suggests that the choice of chatbot may be influenced by factors specific to each market, such as brand recognition or application utility.

53%
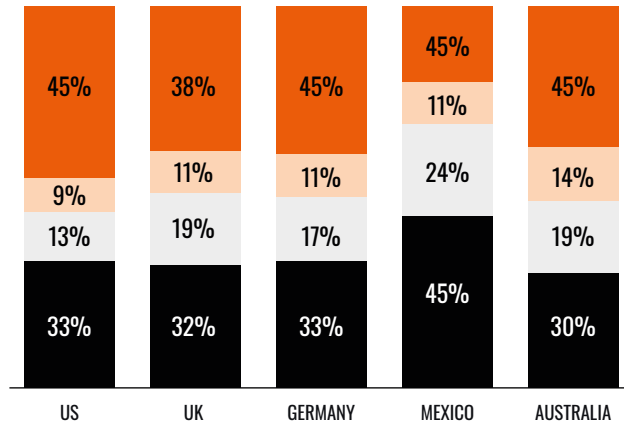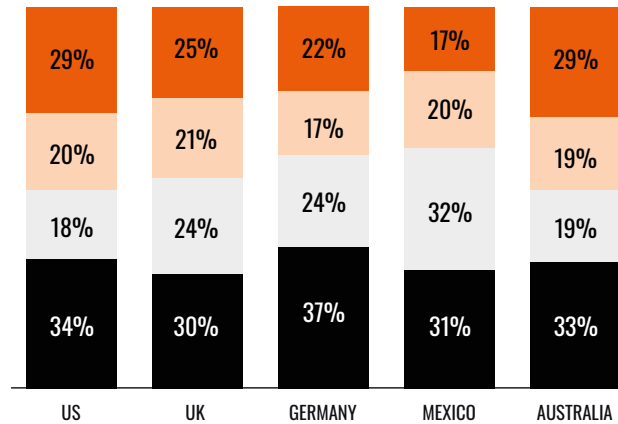### OF USERS EMPLOY CHATBOTS DAILY

EXPERIENCE OF USING CHATBOTS

Among those aware of specific chatbots, ChatGPT has above average usage levels in Mexico, whilst Google Bard does in the US. This suggests that in these two markets specifically, awareness of these chatbots, in particular, is positively linked with their use.
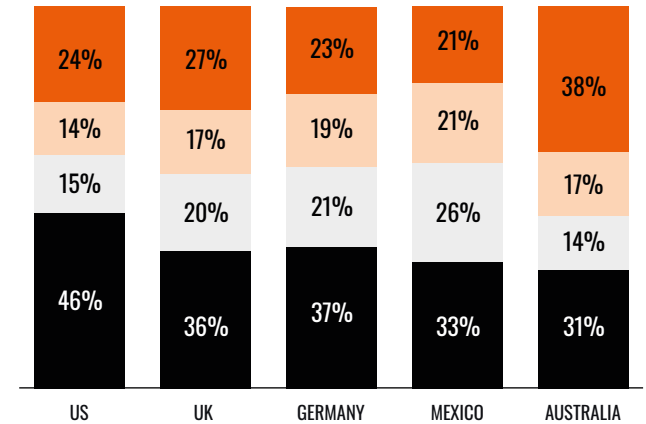
CHATGPT

|	US	UK	GERMANY	MEXICO	AUSTRALIA
I CURRENTLY USE IT	45%	38%	45%	45%	45%
I'VE USED IT IN THE PAST, BUT NO LONGER DO	9%	11%	11%	11%	14%
I HAVE ACCESS TO IT, BUT HAVE NEVER USED IT	13%	19%	17%	24%	19%
I'VE HEARD OF IT BUT NEVER USED IT	33%	32%	33%	45%	30%

BING CHAT

	US	UK	GERMANY	MEXICO	AUSTRALIA
I CURRENTLY USE IT	29%	25%	22%	17%	29%
I'VE USED IT IN THE PAST, BUT NO LONGER DO	20%	21%	17%	20%	19%
I HAVE ACCESS TO IT, BUT HAVE NEVER USED IT	18%	24%	24%	32%	19%
I'VE HEARD OF IT BUT NEVER USED IT	34%	30%	37%	31%	33%

GOOGLE BARD

	US	UK	GERMANY	MEXICO	AUSTRALIA
I CURRENTLY USE IT	24%	27%	23%	21%	38%
I'VE USED IT IN THE PAST, BUT NO LONGER DO	14%	17%	19%	21%	17%
I HAVE ACCESS TO IT, BUT HAVE NEVER USED IT	15%	20%	21%	26%	14%
I'VE HEARD OF IT BUT NEVER USED IT	46%	36%	37%	33%	31%

Legend:
- I CURRENTLY USE IT
- I'VE USED IT IN THE PAST, BUT NO LONGER DO
- I HAVE ACCESS TO IT, BUT HAVE NEVER USED IT
- I'VE HEARD OF IT BUT NEVER USED IT

💬 **QUESTION:**
Which statement best describes your experience with each of the following Chatbots?

OVERALL FREQUENCY OF USING CHATBOTS

US chatbot users tend to be the most frequent users, with over half using them at least once a day, compared to just a third in Germany. In both Germany and the UK, users engage far less frequently.
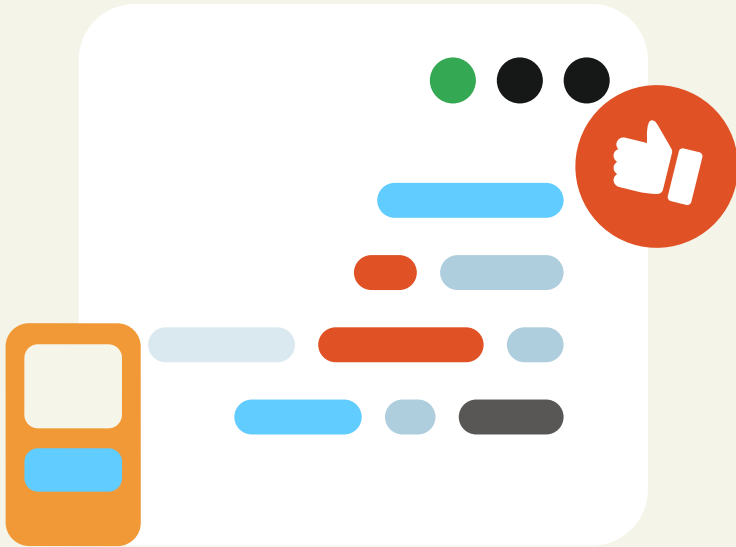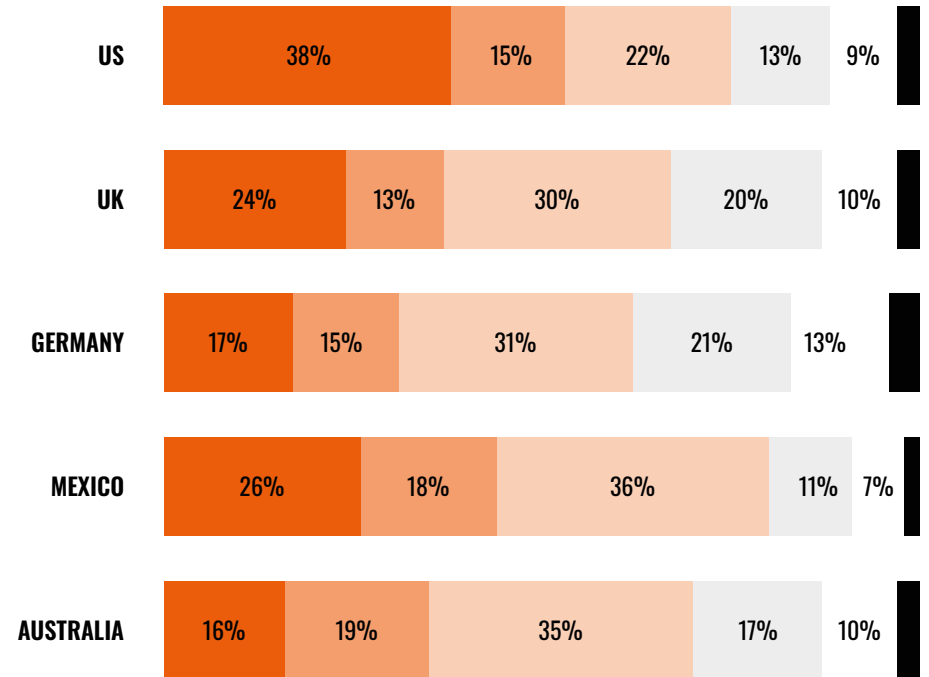
HOW OFTEN DO YOU USE A CHATBOT?

Country	Multiple times a day	Once a day	2-3 times per week	2-3 times per month	Less than once a month	Rarely/Never
US	38%	15%	22%	13%	9%	
UK	24%	13%	30%	20%	10%	
GERMANY	17%	15%	31%	21%	13%	
MEXICO	26%	18%	36%	11%	7%	
AUSTRALIA	16%	19%	35%	17%	10%	

- MULTIPLE TIMES A DAY
- 2-3 TIMES PER MONTH
- ONCE A DAY
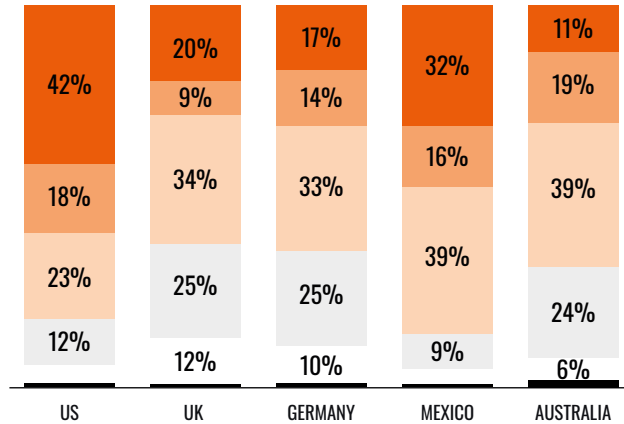- LESS THAN ONCE A MONTH
- 2-3 TIMES PER WEEK
- RARELY / NEVER
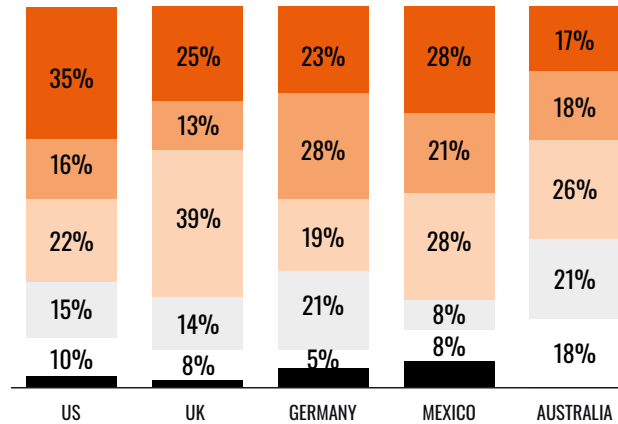
WHICH CHATBOTS ARE USED MOST FREQUENTLY?

In the US ChatGPT and Google Bard are used daily by at least half of their users, highlighting their stickiness of the tech once they have attracted a user.

In the UK, Google Bard users are more likely to use it daily than users of the other chatbots.
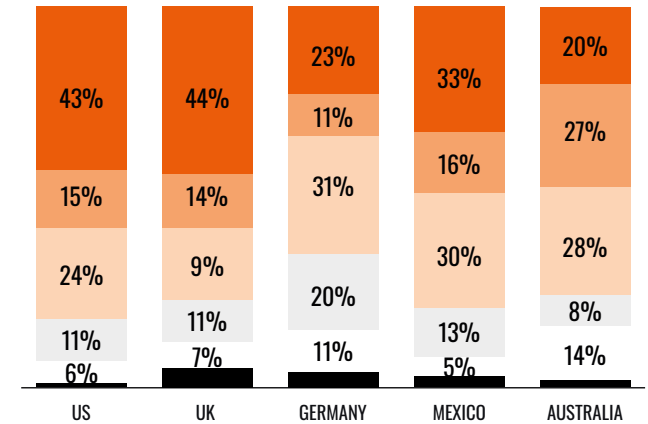
CHATGPT

	US	UK	GERMANY	MEXICO	AUSTRALIA
Multiple times a day	42%	20%	17%	32%	11%
Once a day	18%	9%	14%	—	19%
2-3 times per week	23%	34%	33%	16%	39%
2-3 times per month	12%	25%	25%	39%	24%
Less than once a month	—	12%	10%	9%	6%

BING CHAT

	US	UK	GERMANY	MEXICO	AUSTRALIA
Multiple times a day	35%	25%	23%	28%	17%
Once a day	16%	13%	28%	21%	18%
2-3 times per week	22%	39%	19%	28%	26%
2-3 times per month	15%	14%	21%	8%	21%
Less than once a month	10%	8%	5%	8%	18%

GOOGLE BARD

	US	UK	GERMANY	MEXICO	AUSTRALIA
Multiple times a day	43%	44%	23%	33%	20%
Once a day	15%	14%	11%	16%	27%
2-3 times per week	24%	9%	31%	30%	28%
2-3 times per month	11%	11%	20%	13%	8%
Less than once a month	6%	7%	11%	5%	14%

Legend:
- MULTIPLE TIMES A DAY
- ONCE A DAY
- 2-3 TIMES PER WEEK
- 2-3 TIMES PER MONTH
- LESS THAN ONCE A MONTH
- RARELY / NEVER

💬 **QUESTION:**

Thinking now about some of the specific chatbots you use, how often do you usually use each of the following?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000

ATTITUDES TO CHATBOTS AND AI

CHATBOTS

WHAT ARE PEOPLES THOUGHTS AND CONCERNS WITH THE TECHNOLOGY?

Attitudes to chatbots vary across countries, with those in Mexico generally being more open to the technology and its possibilities.

Most notably, the privacy of data is the area where opinions across countries begin to converge. 47% of those in Mexico, around half in the UK, Germany, and Australia and 60% of those in the US, expressed concerns.

Trust is also identified as an issue for many. Between 40 and 50% of adults in all countries (bar Mexico) don't trust chatbots. As well as privacy concerns, there is a lack of trust in the information received from chatbots. Perhaps as a direct consequence of this, the majority of adults across the countries agree that they would still rather speak to a real person than a chatbot.

There is still some way to go for generative AI technology to navigate these trust and security issues. If not adequately addressed, they will inevitably hamper its further adoption.

SECTION 1 CONVERSATIONAL AI

1. Chatbots are useful for helping to keep me organised

2. I don't trust the information you get from chatbots is correct

3. Chatbots help me to search effectively for the information I want

4. Chatbots help me to multitask

5. Having to use a chatbot would put me off interacting with my favourite brands

6. I don't trust chatbots

7. I am concerned about the privacy of my data when using chatbots

8. I find chatbots frustrating

9. I'm interested in how Conversational AI e.g., chatbots technology will develop in the future

10. As long as the task gets completed, I don't mind if it is done by a chatbot

11. Using a chatbot to search is quicker than text search

12. Everyone will be using chatbots in the future

13. I want to know what else I can do using chatbots

14. I want to be able to do more with a chatbot

15. I feel comfortable using a chatbot when I'm with my friends and family

16. I am confident that I can tell when I am speaking with a chatbot rather than a real person

17. I'd rather speak to a real person than a chatbot
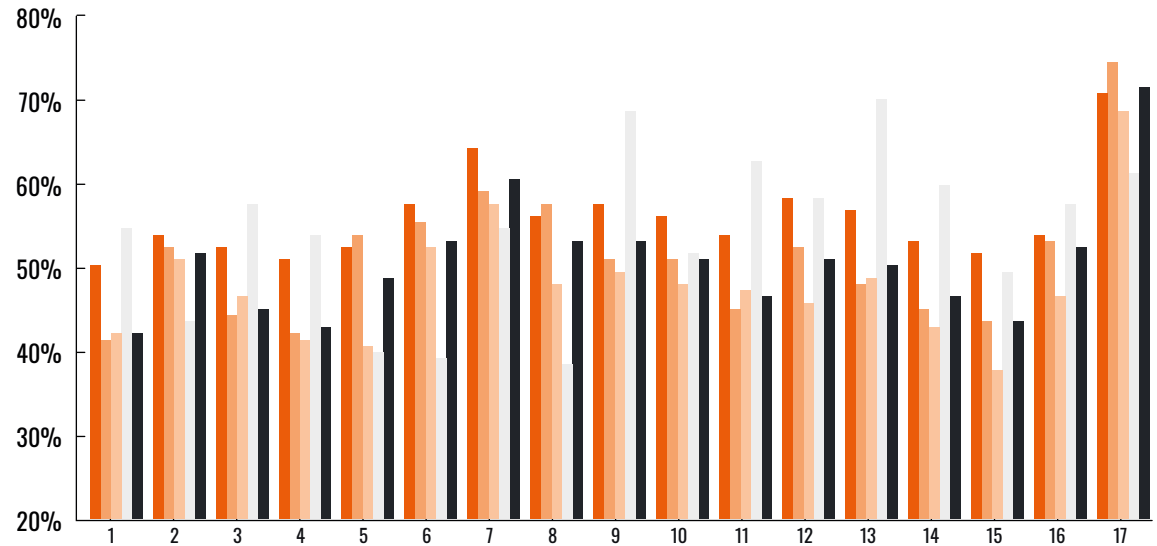
💬 **QUESTION:**

How strongly do you agree with the following statements about chatbots?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000

Legend: ■ US ■ UK ■ GERMANY ■ MEXICO ■ AUSTRALIA

WHAT ARE THE FUTURE CONCERNS ABOUT AI?

Whilst there is strong agreement across each market around the positive impact AI might have in the future (e.g. help speed up boring tasks), there is also some concern around jobs, trust and governance. The findings suggest that adults across the world are emphasising the need to develop technology that supports society. With around half of adults indicating that the thought of AI makes them worried about the future, the technology has some way to go to demonstrate its true value to the wider public. Acknowledging where it can make the greatest difference, rather than trying to do it all, may go a long way in developing trust, changing existing beliefs and reassuring concerns.

1. I am concerned that technology will take away jobs from humans

2. The thought of Artificial Intelligence (AI) makes me feel worried about the future

3. Artificial Intelligence (AI) can speed up boring tasks

4. Artifical Intelligence (AI) reinforces existing racial and sexist predjudices

5. Artifical Intelligence provides many more opportunities for humans

6. AI is not able to make mistakes

7. AI should not be relied upon to make decisions

8. AI is only as good as the algorithm behind it

9. Humans must take responsibility to ensure technology develops in a way that supports society

💬 **QUESTION:**
How strongly do you agree or disagree with the following statements about Artificial Intelligence (AI)?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000

Legend: US — UK — GERMANY — MEXICO — AUSTRALIA
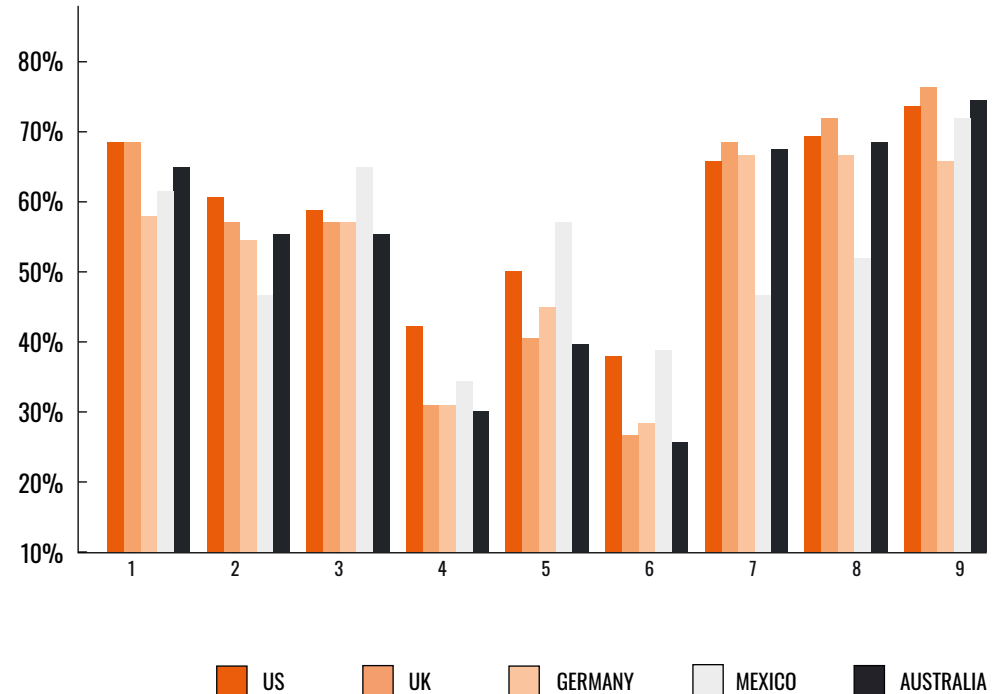
SUMMARY AND TAKEAWAYS

BY SUSAN WESTWATER
RESEARCH LEAD, OPEN VOICE NETWORK

It's clear consumers recognise the value of chatbots as they use them on a daily basis for a range of tasks and activities. However, brands should recognise that chatbots are not always the answer to every consumer need or question. Brands can capitalise on the opportunities where chatbots can support positive customer experiences by delivering the help and information they need to complete tasks and make decisions. An intentional, well-designed chatbot that serves its audience reliably and effectively builds loyalty while enabling internal efficiencies.

Regardless of brands' maturity, it's clear that chatbots are now a part of the digital landscape. As usage continues to increase, the expectation that a brand has a digital assistant available for its customers will also grow. Now is the time for brands to meet the current expectation levels so they can understand and iterate as opposed to playing catch-up later.

Comfort levels with Conversational AI and chatbots will continue to grow through thoughtful design and policies. Consumers are already acknowledging the powerful potential of AI. As brands develop AI-powered experiences, it's important that those consumer-driven experiences are developed alongside policies that ensure responsible and ethical practices from the start.

THE RISE OF VOICE TECH: ASSISTANTS ENTER THE MAINSTREAM

Voice assistants like Alexa, Siri, and Google Assistant have rapidly gone from novelties to indispensable tools integrated into our daily lives. Globally, the number of voice assistants in use in homes today is around 4.4 billion, and that's expected to grow to 8.4 billion by 2024. This section explores the meteoric rise of voice tech in our focus territories, revealing how it's crossing the chasm from early adopters to mainstream ubiquity.

8.4 BILLION
VOICE ASSISTANTS IN HOMES BY 2024
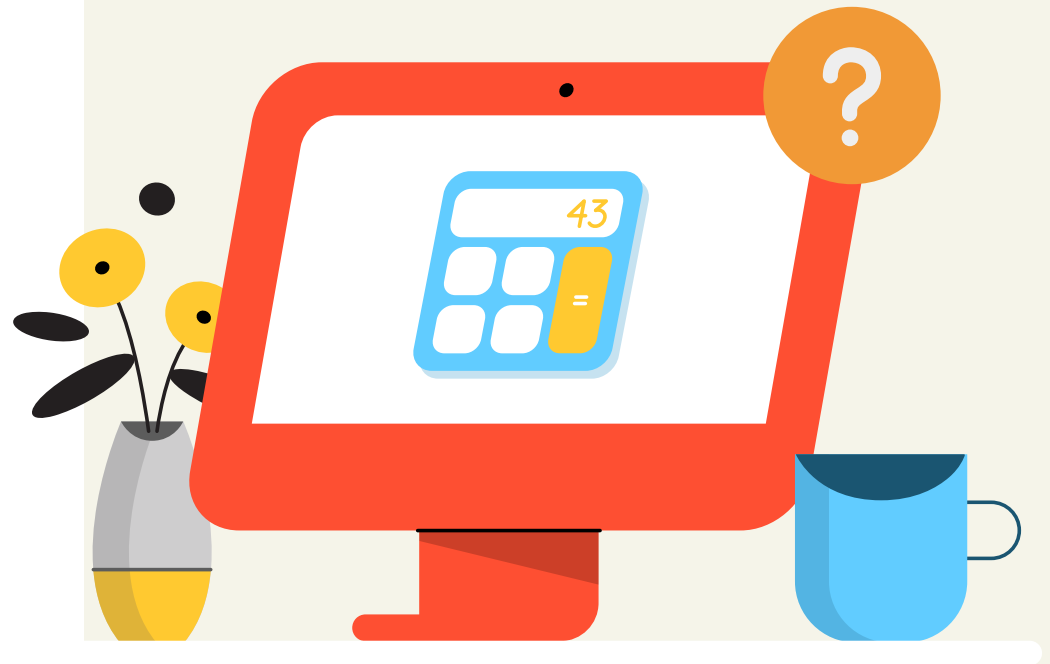
SECTION 2: VOICE ASSISTANTS

The headline numbers speak for themselves – over 60% of consumers now regularly use voice assistants in markets like the US, UK and Mexico. But this report uncovers so much more, from how adoption spreads across demographics to the nuanced ways voice is woven into our routines.

We analyse the devices propelling this voice revolution, from the explosion of smart speakers to the assistant showdowns happening on smartphones. And we compare how markets like Mexico and Germany have differing brand allegiances. This provides unmatched insight into the voice tech competitive landscape.

Beyond the numbers, we also reveal how consumers really feel about voice assistants. What are the use cases they find most useful?

How comfortable do they feel using voice in public or private settings? The research taps into personal attitudes and perceptions that statistics alone can't capture.
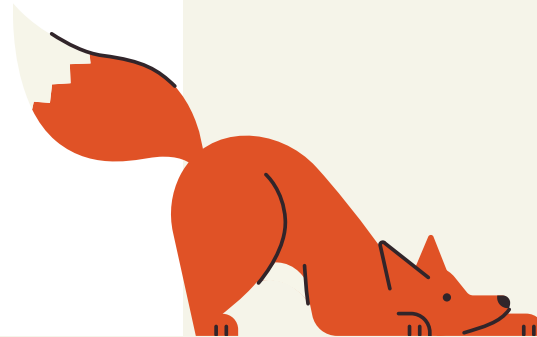
Ultimately, the voice assistant has crossed the chasm into indispensability for millions globally. And this section unpacks all the factors propelling voice firmly into the mainstream, today and in the years ahead. Let's explore the data and discover the trends shaping the ascent of voice tech in everyday life.

> **WHEREBY VOICE SEARCH INDICATED WHERE THE FUTURE MAY BE GOING FOR THE CHANNEL IN A MARKETING MIX, IT'S GEN AI THAT HAS REALLY CAPTURED THE HEARTS AND MINDS OF BRANDS. A CLUE AS TO WHY THIS COULD BE IS DUE TO A COMBINATION OF USEFULNESS IN INTERNAL BUSINESS APPLICATIONS, AS WELL AS CUSTOMER-FACING MARKETING, SALES AND COMMUNICATION APPLICATIONS.**

NITIN DHAMELIA
GLOBAL DIGITAL PERFORMANCE MANAGER,
BARILLA GROUP

VOICE AWARENESS AND USAGE

HOW DOES USAGE AND FAMILIARITY DIFFER ACROSS MARKETS?

Usage is higher than familiarity, showing people are not as informed about the definition despite using the tech. Around two in five adults are either very or fairly familiar with voice-activated tech across the US, UK, Mexico and Australia, but this drops to a quarter of adults in Germany.

	US	UK	Germany	Mexico	Australia
Current Users: Any voice Assistant	61%	62%	49%	66%	52%
Familiarity with voice-activated tech (Very / Quite Familiar)	41%	42%	24%	40%	38%

💬 **QUESTION:**
Which of the following best describes how familiar you are with voice-activated technology?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000

HOW HAS USAGE GROWN OVER THE PAST THREE YEARS?

While voice assistant usage has decreased slightly since 2022, it still remains close to half for Germany and around 60% in the US and UK. The rise of AI technologies may have diverted attention to new tools, but usage still remains strong.

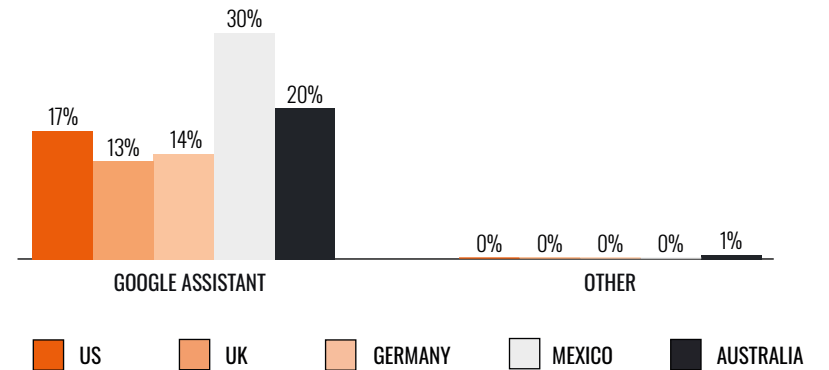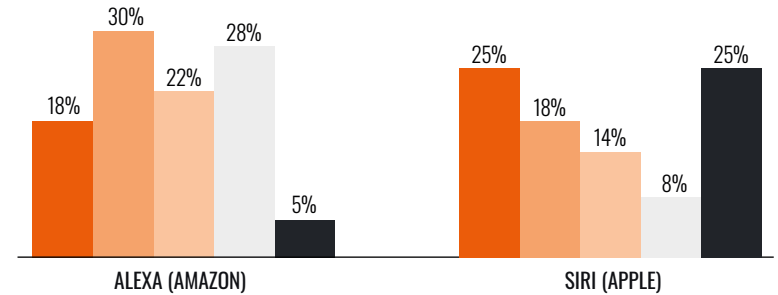|	US	UK	Germany
2023: Current Users: Any voice Assistant (AICI 2023)	61%	62%	49%
2022: Current Users: Any voice Assistant (VCI 2022)	63%	65%	54%
2021:Current Users: Any voice Assistant (VCI 2021)	57%	59%	52%

💬 **QUESTION:**
Do you use a voice assistant?
Source: Voice Consumer Index 2021 & Voice Consumer Index 2022 (Vixen Labs)

WHICH VOICE ASSISTANT IS THE MOST POPULAR?

There is variation across markets in which brands are most popular. In the USA, the three core brands have sizable usage, whereas Alexa leads in the UK and to a lesser extent, Germany. Google Assistant is closely followed by Alexa in Mexico, and Siri leads Google Assistantw in Australia. Furthermore, Alexa has few users in Australia, whilst Siri is least popular in Mexico.

ALEXA (AMAZON): US 18%, UK 30%, GERMANY 22%, MEXICO 28%, AUSTRALIA 5%

SIRI (APPLE): US 25%, UK 18%, GERMANY 14%, MEXICO 8%, AUSTRALIA 25%

GOOGLE ASSISTANT: US 17%, UK 13%, GERMANY 14%, MEXICO 30%, AUSTRALIA 20%

OTHER: US 0%, UK 0%, GERMANY 0%, MEXICO 0%, AUSTRALIA 1%

Legend: US, UK, GERMANY, MEXICO, AUSTRALIA
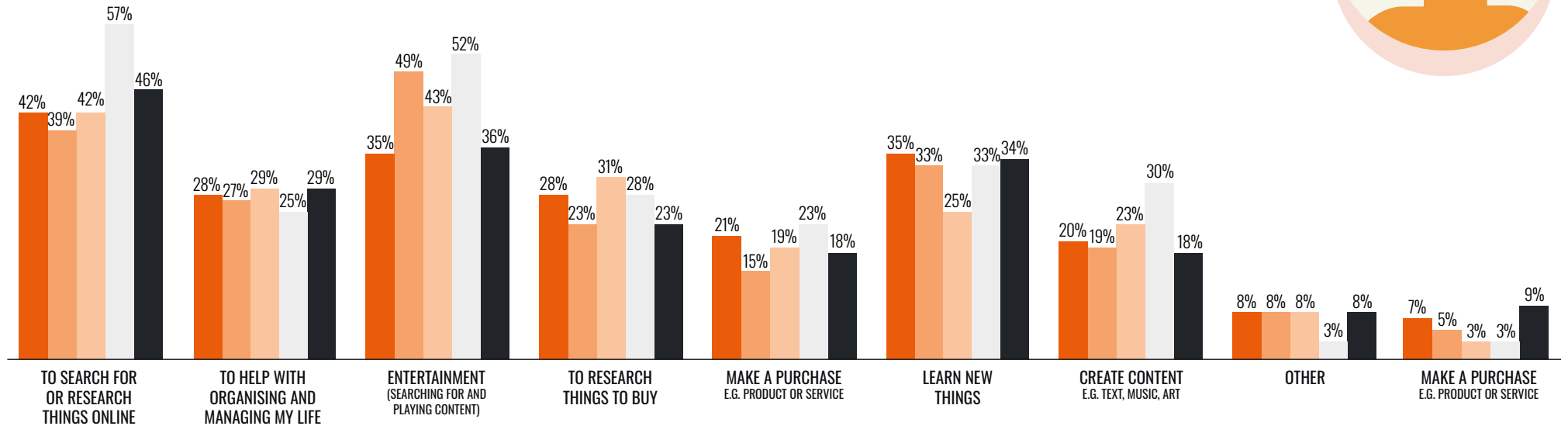
💬 **QUESTION:**
You said you currently use more than one voice assistant, which one would say you use most frequently?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000

HOW ARE PEOPLE USING VOICE ASSISTANTS?

Entertainment and search are the top reasons for people to use their voice assistant across all markets, whereas organisation and making purchases are low priorities. Mexico showed the highest percentages for search and entertainment.

TO SEARCH FOR OR RESEARCH THINGS ONLINE: US 42%, UK 39%, Germany 42%, Mexico 57%, Australia 46%

TO HELP WITH ORGANISING AND MANAGING MY LIFE: US 28%, UK 27%, Germany 29%, Mexico 25%, Australia 29%

ENTERTAINMENT (SEARCHING FOR AND PLAYING CONTENT): US 35%, UK 49%, Germany 43%, Mexico 52%, Australia 36%

TO RESEARCH THINGS TO BUY: US 28%, UK 23%, Germany 31%, Mexico 28%, Australia 23%

MAKE A PURCHASE E.G. PRODUCT OR SERVICE: US 21%, UK 15%, Germany 19%, Mexico 23%, Australia 18%

LEARN NEW THINGS: US 35%, UK 33%, Germany 25%, Mexico 33%, Australia 34%

CREATE CONTENT E.G. TEXT, MUSIC, ART: US 20%, UK 19%, Germany 23%, Mexico 30%, Australia 18%

OTHER: US 8%, UK 8%, Germany 8%, Mexico 3%, Australia 8%

MAKE A PURCHASE E.G. PRODUCT OR SERVICE: US 7%, UK 5%, Germany 3%, Mexico 3%, Australia 9%

Legend: US, UK, GERMANY, MEXICO, AUSTRALIA

💬 **QUESTION:**
Which, if any of the following have you ever done?
Base: Current users: Voice Assistants

WHAT ARE PEOPLE SEARCHING FOR WITH VOICE ASSISTANTS?

Weather, music and news are the three top searches performed on a voice assistant across all five markets. Compared to the other four markets, people in the US are slightly more likely to request information on each of the different sectors overall. Looking further, there are opportunities in the Entertainment, Health and Wellness, and Food Delivery sectors for businesses to seize.

Likelihood of using voice-activated searches by sector: T2B (Likely)	US	UK	Germany	Mexico	Australia
Weather	79%	77%	74%	73%	76%
Music	78%	81%	70%	81%	73%
News	67%	65%	64%	66%	59%
Entertainment	67%	56%	52%	63%	55%
Healthcare & Wellness	58%	43%	43%	55%	47%
Food Delivery & restaurants	57%	41%	38%	60%	44%
Retail	56%	39%	39%	51%	41%
Booking a restaurant reservation	54%	37%	37%	46%	41%
Travel	54%	38%	39%	48%	39%
Consumer Packaged Goods	51%	35%	40%	54%	38%
Local Services	51%	36%	40%	49%	41%
Fitness	51%	38%	40%	49%	38%
Fashion	50%	35%	39%	53%	38%
Finance	47%	30%	31%	43%	30%
Other	52%	39%	45%	50%	38%

💬 **QUESTION:**

Currently, how likely are you to use voice-activated searches for the following types of products and services?
(Quite likely + Very Likely)
Base size: Current users: Voice Assistants

USER RETENTION AND FREQUENCY

HOW FREQUENTLY ARE PEOPLE USING THEIR VOICE ASSISTANT?

Adults in Mexico have the highest usage frequency across the five markets – three in ten adults use voice-activated tech multiple times a day, compared to only one in eight adults in Australia, the lowest level across the five markets. All markets have significant proportions of non-users representing significant opportunities for market growth.
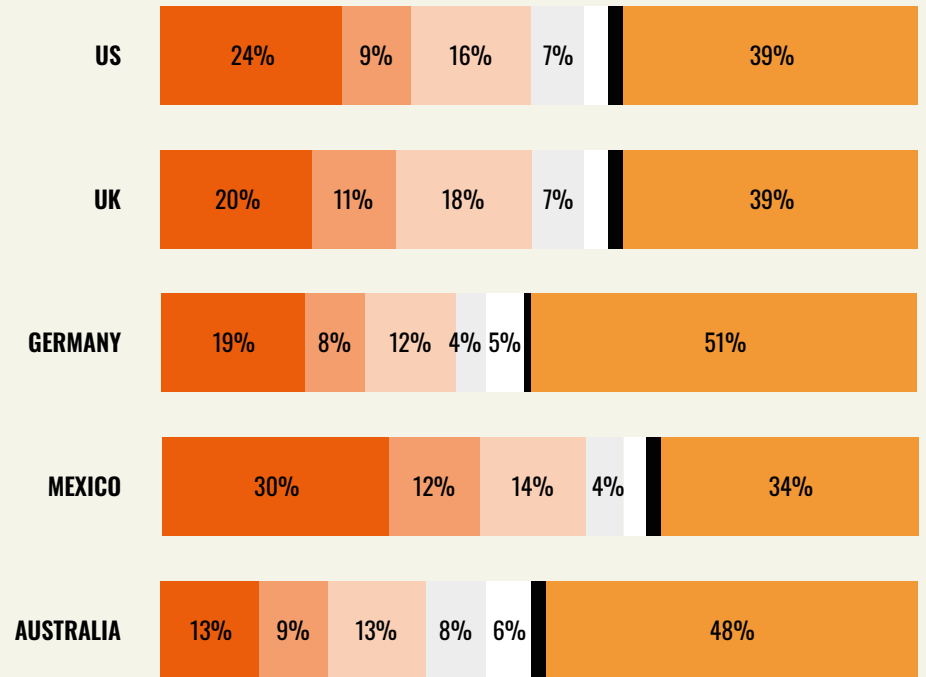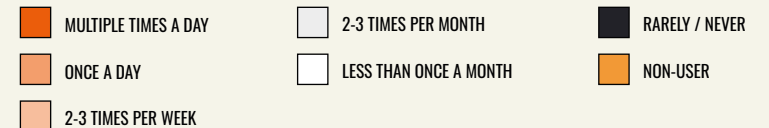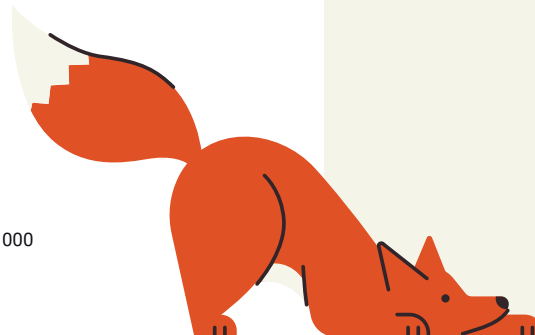
💬 **QUESTION:**

Generally, how often do you use voice assistants?
Nat Rep each country US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000

HOW OFTEN DO YOU USE A VOICE ASSISTANT?

	Multiple times a day	Once a day	2-3 times per week	2-3 times per month	Less than once a month	Rarely / Never	Non-user
US	24%	9%	16%	7%			39%
UK	20%	11%	18%	7%			39%
GERMANY	19%	8%	12%	4%	5%		51%
MEXICO	30%	12%	14%	4%			34%
AUSTRALIA	13%	9%	13%	8%	6%		48%

- 🟧 MULTIPLE TIMES A DAY
- 🟧 ONCE A DAY
- 🟧 2-3 TIMES PER WEEK
- ⬜ 2-3 TIMES PER MONTH
- ⬜ LESS THAN ONCE A MONTH
- ⬛ RARELY / NEVER
- 🟧 NON-USER

ATTITUDES TO VOICE ASSISTANTS

WHAT ARE PEOPLE'S ATTITUDES TO VOICE ASSISTANTS?

Overall, the sentiment towards voice assistants is positive and has increased since 2022. Interestingly, trust is on the decline with more people in the US, UK and Germany stating they don't trust voice assistants. This could be due to the growing awareness of the technology, coupled with concerns around AI and data protection practices reported in the media, and seen in our own data.

💬 **QUESTION:**
How strongly do you agree or disagree with the following statements about voice-activated technology?
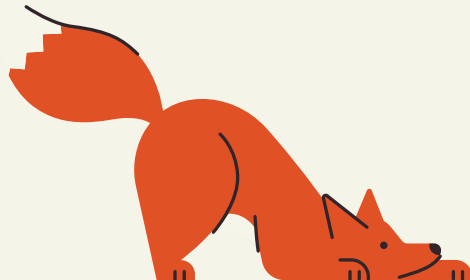Base size: Nat Rep: US N= 2000, UK N= 2000, DE N= 1000, MX N= 1000, AU N= 1000

Attitudes to Voice Assistants T2B (Agree)	US	UK	Germany	Mexico	Australia
Using a voice assistant to search is quicker than text	64%	52%	51%	79%	51%
I'm interested in how voice assistant technology will develop in the future	60%	50%	45%	76%	50%
Everyone will be using voice assistants in the future	58%	51%	40%	70%	50%
Voice assistants help me to search effectively for the information I want	58%	49%	45%	72%	44%
I am concerned about the privacy of my data when using voice assistants	58%	51%	48%	47%	48%
I want to know what else I can do using voice assistants	57%	48%	44%	79%	47%
I feel comfortable using my voice assistant when I'm with my friends and family	56%	48%	32%	61%	41%
I want to be able to do more with a voice assistant	54%	40%	35%	70%	40%
Voice assistants help me to multitask	54%	42%	37%	68%	42%
Voice assistants are useful for helping to keep me organised	50%	41%	38%	65%	38%
I turn off my voice assistant when I'm not using it	48%	39%	40%	53%	39%
I feel comfortable using my voice assistant in public	46%	33%	23%	54%	30%
I find voice assistants frustrating	43%	37%	30%	17%	38%
I don't trust voice assistants	42%	36%	37%	14%	35%

DEVICES USED WITH VOICE-ACTIVATED TECHNOLOGY

The devices used with voice-activated technology vary by country, reflecting regional preferences and device availability. Smart speakers and smartphones dominate the landscape, with each market showing unique usage patterns.
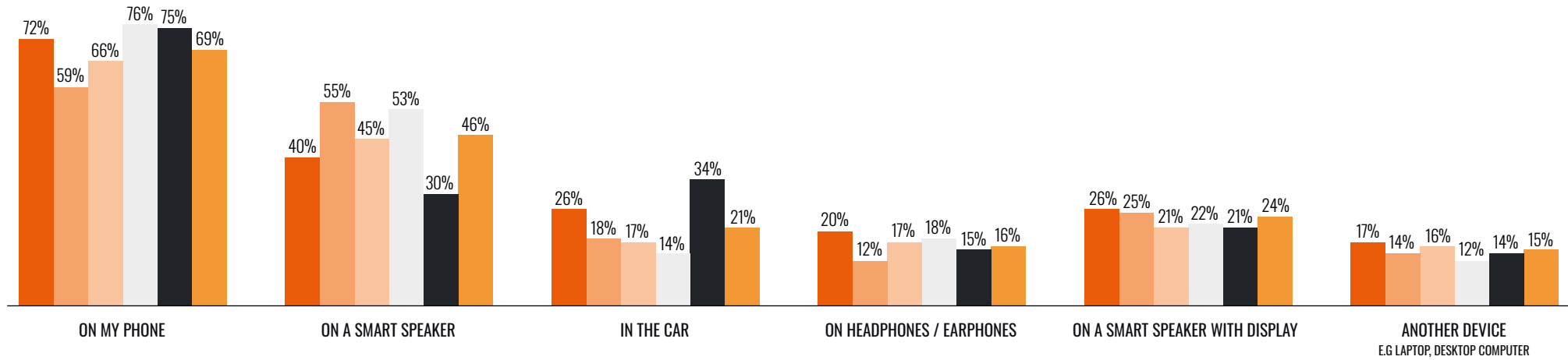
In the US, smart speaker usage is prominent, primarily due to the widespread adoption of Amazon's Alexa. In contrast, in the UK, the smartphone is preferred, particularly with Siri. In Germany, Australia, and Mexico there are balanced distributions between iOS and Android devices. These variations can be affected by factors like market dynamics, consumer behaviour, and device ecosystems.

WHICH VOICE-ENABLED DEVICES ARE PEOPLE USING?

While the use of Voice assistants is highest on phones across the countries, there is some variation in preferences for other devices. In the UK and Mexico, more than half of users engage with their VAs on a smart speaker, while in Australia, around a third use their VA in the car. Compared to 2022, usage across devices and markets continues to rise, demonstrating the acceptance of voice technology in everyday life.

ON MY PHONE: 72% 59% 66% 76% 75% 69%
ON A SMART SPEAKER: 40% 55% 45% 53% 30% 46%
IN THE CAR: 26% 18% 17% 14% 34% 21%
ON HEADPHONES / EARPHONES: 20% 12% 17% 18% 15% 16%
ON A SMART SPEAKER WITH DISPLAY: 26% 25% 21% 22% 21% 24%
ANOTHER DEVICE E.G LAPTOP, DESKTOP COMPUTER: 17% 14% 16% 12% 14% 15%

Legend: US, UK, GERMANY, MEXICO, AUSTRALIA, TOTAL MARKETS

💬 **QUESTION:**
On what devices do you usually use a voice assistant?? (Alexa, Siri, Google Assistant)
Base: Current users: Voice Assistants

IN SUMMARY

BY SUSAN WESTWATER
RESEARCH LEAD, OPEN VOICE NETWORK

It's no surprise that familiarity and usage of voice assistants continue to rise. The benefits of using voice-enabled technology are clear to users. While there is still a need to build trust through truly helpful and valuable experiences with clear privacy and data policies, there's still very much an appetite to use voice to get information and complete tasks.

As voice assistant users recognise the value and convenience voice technology brings, the realm of voice assistants continues to grow beyond the smart speaker in the home. It's clear users are looking to bring their assistants with them on their phones and in their cars. As brands think of their voice assistants, the approach needs to be omnichannel for a cohesive strategy and brand presence across devices.

The ongoing growth of voice search continues to show the value of being able to talk versus type a question. Because of this, information gathering and content discovery will continue to shift towards owning the answer and conversation, as opposed to keywords. Brands need to be aware of not just what are the core questions but what are the conversations that relate to their brands and categories.

Voice technology users are also taking their voice tasks beyond the informational and into the transactional. This means that when given the opportunity, those users will want to continue their journey from Awareness and Consideration into Purchase and even Retention. The key for brands will be the ability to meet their audiences' expectations.
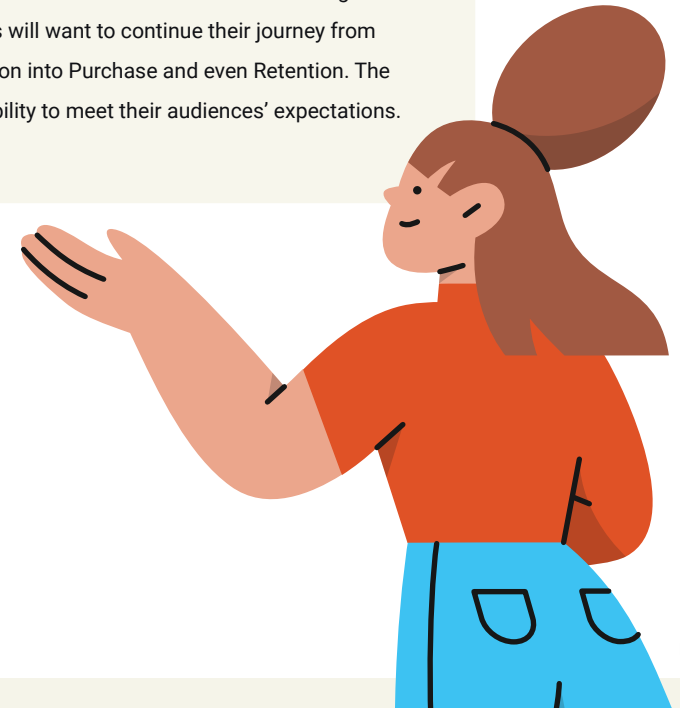
ABOUT VIXEN LABS

Vixen Labs is the global leader in full-service Conversational AI strategy and design.

We help you to revolutionise your connection with customers while delivering real business value using Conversational AI. We create ground-breaking solutions for the world's biggest brands.

Our full-service offering covers strategy, custom solutions, app integration, education and consultancy.

Whether you're looking to start your Conversational AI strategy, train up your team, or build a voice application – it all starts with a conversation. A conversation with us.

EMAIL US AT INFO@VIXENLABS.CO

BROUGHT TO YOU BY: ▼ VIXEN LABS   POWERED BY: ●delineate   SPONSORED BY: OPEN VOICE NETWORK *Voice worthy of user trust*

ABOUT DELINEATE

Delineate connects world-leading brands with their consumers by delivering live, accurate and actionable brand and campaign tracking data for faster decision-making.

Delineate's Proximity platform has access to consumers in over 130 countries, delivering real-time survey data via modern data tools, dashboards and APIs for insight teams, marketers, data science and big data analytics.

The ambition is to turn Delineate into the go-to for brands that want to understand the world in real-time, so they can make better decisions.

CONTACT US

BASE SIZES

	US	UK	Germany	Mexico	Australia
Nat Rep	2000	2000	1000	1000	1000
Current Users: Voice Assistants	1218	1224	492	661	511
Current Users Generative AI tools	1389	1327	558	730	597
Current Users: Chatbots (all)	555	479	240	273	238
Chat GPT Users	275	268	145	141	144
Bing Chat users	158	90*	60*	44*	43*
Google Bard users	219	139	72*	125	67*