Voice Assistant Adoption & Attitudes

Advanced AI to power the new generation of intelligent conversational interfaces.

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TEAM OF INDUSTRY EXPERTS

- founded in 2011
- PhDs from MIT, Stanford, CMU
- industry experts from Google, Microsoft, SpaceX, Yahoo!
- expertise in AI, NLP & QA

Tim Tuttle
Founder & CEO

- CEO/Founder, Truveo (acq. AOL)
- SVP, AOL Search
- CTO/Founder, Bang Networks
- Research Director, Bell Labs
- PhD, MIT AI Lab
- MS, BS MIT, Phi Beta Kappa

INDUSTRY RECOGNITION

CUSTOMERS & PARTNERS INCLUDE

INVESTORS INCLUDE
What the Intelligent Voice Assistant Universe Looks Like Today
What the Intelligent Voice Assistant Universe Will Look Like Soon
So Why are We Looking at General Purpose Voice Assistant Adoption?

- Voice Assistants are a leading indicator of voice interface adoption
- Assess when generic voice assistants will peak in satisfying consumer needs
- Assess when demand will spill over to native apps
Methodology

- Online survey of 1800 smartphone users conducted in Q4, 2015 and Q1, 2016
- Geographically distributed across the United States
- All respondents over the age of 18
- Equal male and female respondents
2015 Was the Tipping Point in Adoption of Voice Assistants

US smartphone users & their experience with smartphone voice assistants
Mainstream Adoption

Which voice assistants have you tried?

- Siri: 36%
- OK Google: 28%
- Cortana: 9%
- Alexa: 4%
- Other: 0%
- None of the above: 38%
Pervasive Across All Age Groups

Which of voice assistants have you tried?

- **Siri**
- **OK Google**
- **Cortana**
- **Amazon Alexa**
- None of the above

**Age Groups**
- Age 18-24
- Age 25-34
- Age 35-44
- Age 45-54
- Age 55-64
- Age 65+

- Siri: 52% (18-24) 41% (25-34) 41% (35-44) 30% (45-54) 29% (55-64) 26% (65+)
- OK Google: 32% (18-24) 32% (25-34) 25% (35-44) 33% (45-54) 30% (55-64) 26% (65+)
- Cortana: 9% (18-24) 13% (25-34) 7% (35-44) 3% (45-54) 11% (55-64) 4% (65+)
- Amazon Alexa: 26% (18-24) 4% (25-34) 13% (35-44) 4% (45-54) 4% (55-64) 4% (65+)
- None of the above: 26% (18-24) 4% (25-34) 7% (35-44) 4% (45-54) 4% (55-64) 4% (65+)
Frequency of Use is Rapidly Growing

How often do you use voice search/commands?

- Every day: Q1 2016 (22%), Q4 2015 (18%)
- At least once per week: Q1 2016 (33%), Q4 2015 (31%)
- At least once per month: Q1 2016 (15%), Q4 2015 (15%)
- Less than once per month: Q1 2016 (31%), Q4 2015 (36%)
- Regularly (every day + every week): Q1 2016 (55%), Q4 2015 (49%)

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48% of Users are satisfied; 13% Dissatisfied

How satisfied are you with voice search/commands today?

- Very satisfied: 21%
- Somewhat satisfied: 27%
- Neutral: 39%
- Somewhat dissatisfied: 7%
- Very dissatisfied: 6%
Home Usage Dominates Other Uses

Where do you use voice features the most?

- At home: 43%
- In the car: 36%
- On the go: 19%
- At work: 3%
Hands Free Usage is the Main Driver

Why do you use voice/search commands?  
Check all that apply.

- They're fun/cool: 22%
- They get me results faster: 30%
- It's hard to type on certain devices: 24%
- I can avoid confusing menus: 12%
- They're useful when my hands or vision are occupied: 61%
- Other: 1%
Voice Users are Also Heavier Mobile App Users

- **Shopping apps** (eBay, Etsy, etc.):
  - Have Tried Voice: 77%
  - Are Open to trying voice: 13%
  - Don’t think they’ll ever try voice: 10%

- **Video apps** (YouTube, Netflix, etc.):
  - Have Tried Voice: 77%
  - Are Open to trying voice: 13%
  - Don’t think they’ll ever try voice: 10%

- **Music apps** (Pandora, Spotify, etc.):
  - Have Tried Voice: 75%
  - Are Open to trying voice: 13%
  - Don’t think they’ll ever try voice: 12%

- **Local services apps** (Yelp, Uber, etc.):
  - Have Tried Voice: 71%
  - Are Open to trying voice: 15%
  - Don’t think they’ll ever try voice: 14%

- **Connected home apps** (Nest, SmartThings, etc.):
  - Have Tried Voice: 71%
  - Are Open to trying voice: 15%
  - Don’t think they’ll ever try voice: 14%

- **Uses none of the previous types of apps**:
  - Have Tried Voice: 32%
  - Are Open to trying voice: 55%
  - Don’t think they’ll ever try voice: 14%
And the Next Contestant Is… Music?

In which type of apps would you most like to use voice commands or voice search? Check all that apply.

- Local services apps: 40% Uses said type of app, 20% Total population
- Shopping apps: 41% Uses said type of app, 23% Total population
- Travel apps: 41% Uses said type of app, 19% Total population
- Music apps: 50% Uses said type of app, 33% Total population
- Video apps: 41% Uses said type of app, 28% Total population
- Connected home apps: 22% Uses said type of app, 10% Total population
- None of the above: 68% Uses said type of app, 26% Total population
Conclusions

• Voice assistants went mainstream in 2015
• Users are overall satisfied but expect more
• Home use dominates over other use cases
• Users expect apps to get native voice interfaces
Questions ?

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