

# **VOICE ASSISTANTS**

## **LEVERAGING THE**

## **POWER OF VOICE**

**Steve Ginnis**



# EVOLUTION OF RESEARCH

## The 80s and before



**Paper-based surveys,  
face-to-face and  
telephone – interviewer  
led conversation**

## The 90s



## The Noughties



## The Teenies

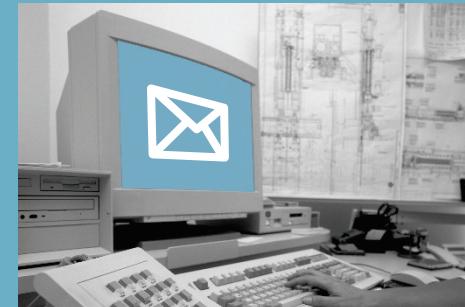


# EVOLUTION OF RESEARCH

## The 80s and before



## The 90s



**Internet based survey took off, often email based, short and one way,**

## The Noughties



## The Teenies

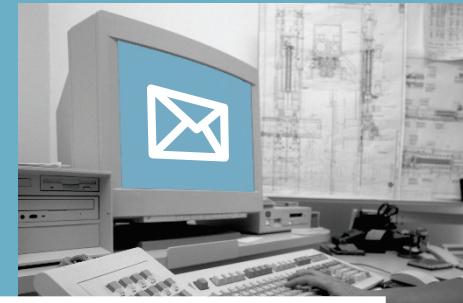


# EVOLUTION OF RESEARCH

## The 80s and before

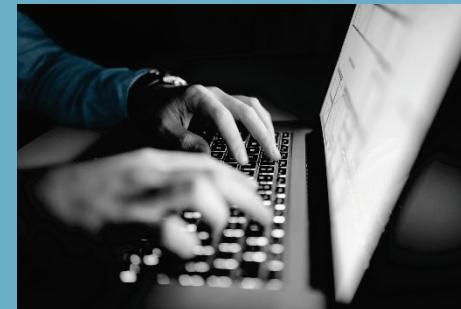


## The 90s



**Online research, mobile apps, research on the go developed from the start of the century**

## The Noughties



## The Teenies



# EVOLUTION OF RESEARCH

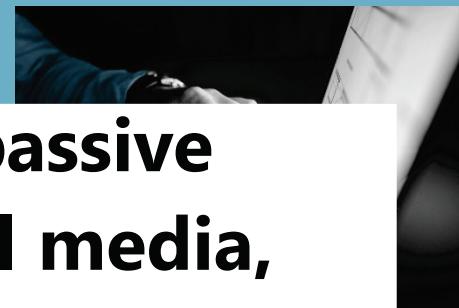
## The 80s and before



## The 90s



## The Noughties



**Technology has brought IoT, passive tracking, user generated social media, biometric, facial coding, natural language processing and AI... brings us intelligent technology led conversation.**

## The Teenies

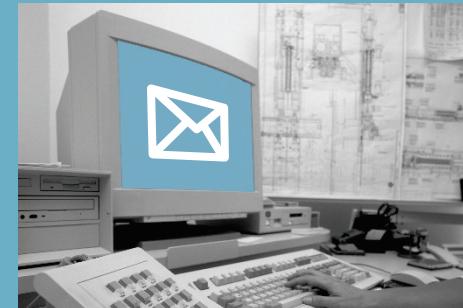


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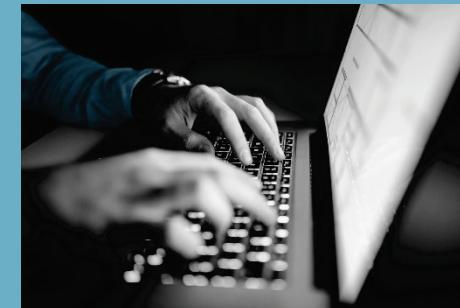
The 80s  
and before



The 90s



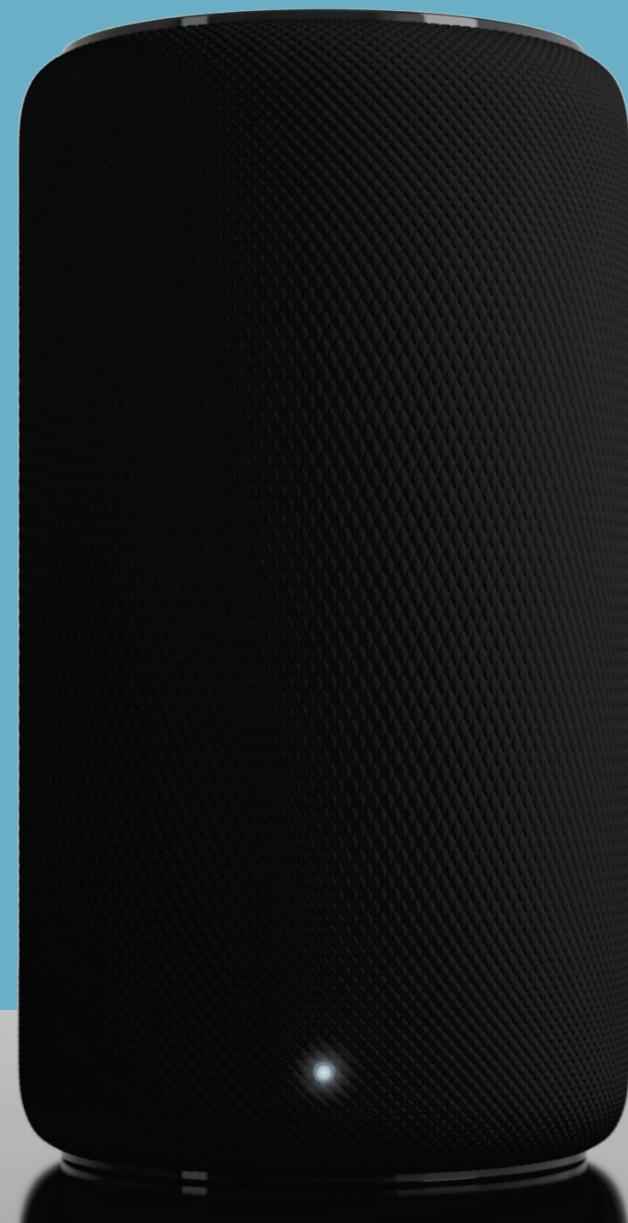
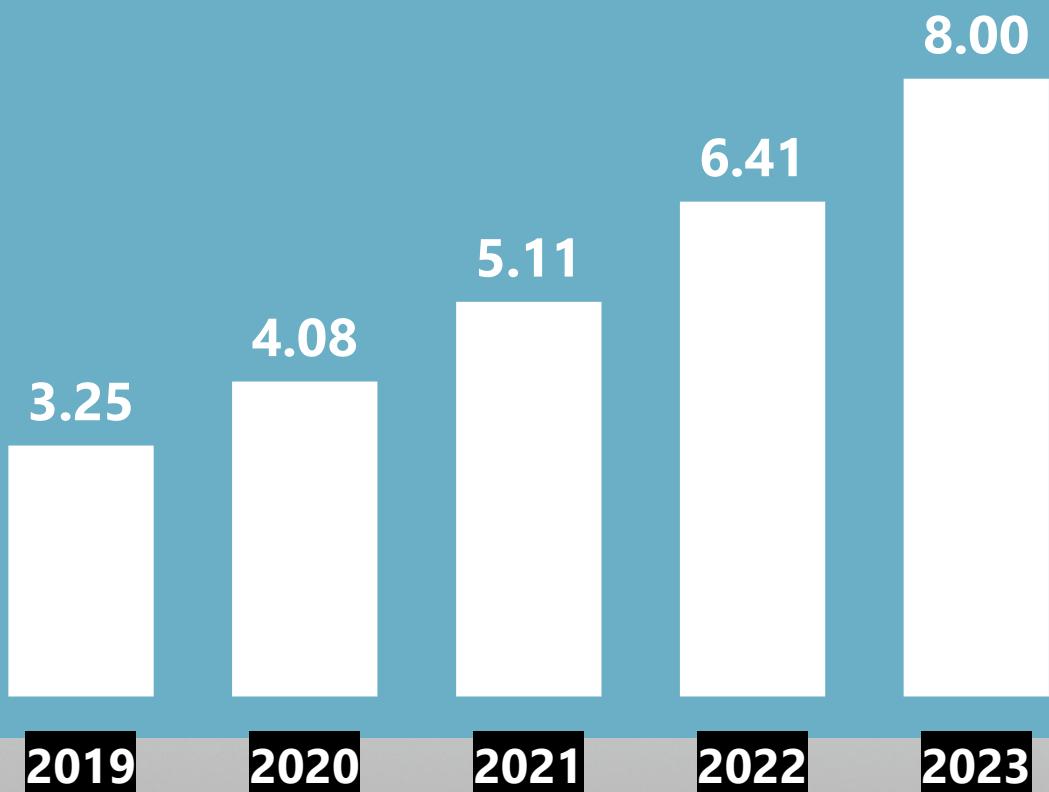
The  
Noughties



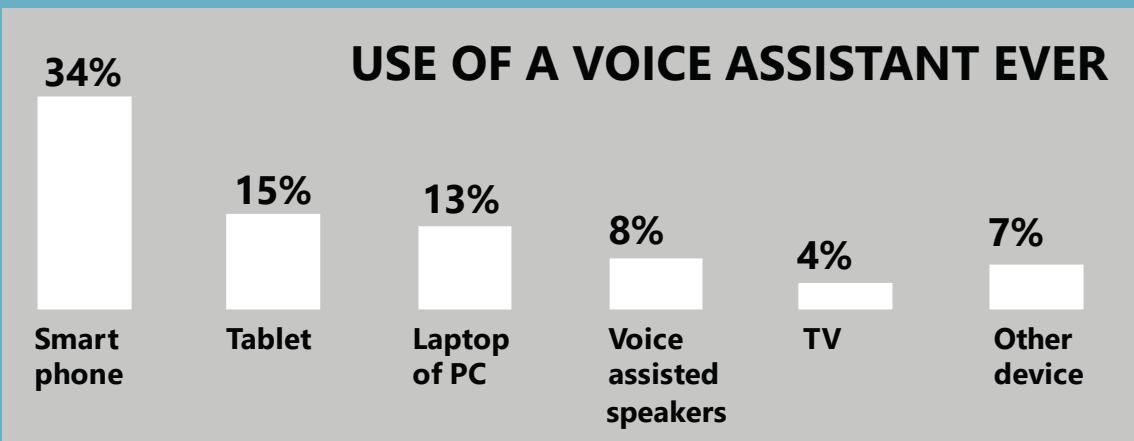
The  
Teenies



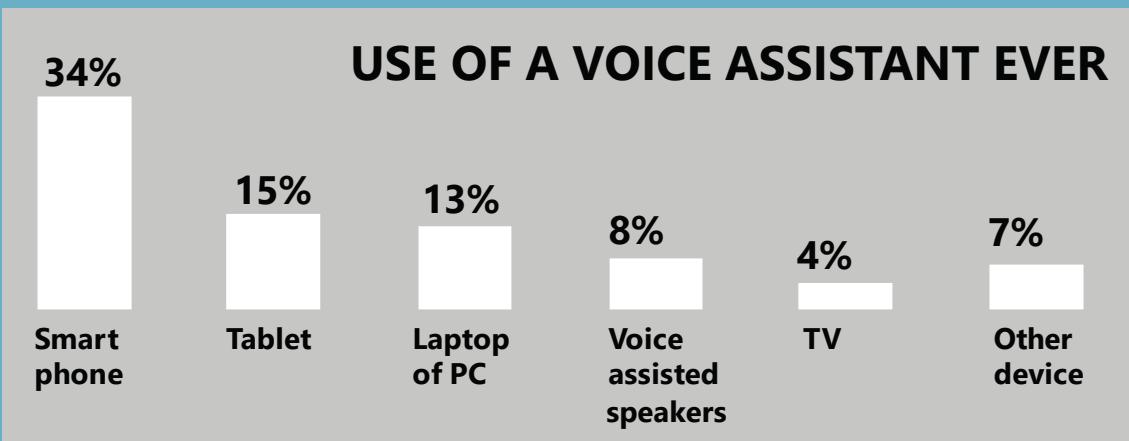
# EXPLOSION OF VOICE BASED TECHNOLOGY



# VOICE ASSISTANTS



# VOICE ASSISTANTS



Since Q1 2018,  
ownership of Voice  
Activated Speakers

has from 8% to  
14%



# VOICE ASSISTANTS

34%



Smart phone

15%

A small white horizontal bar representing 15% of users.

Tablet

A small white horizontal bar representing 13% of users.

13%

Laptop or PC

A small white horizontal bar representing 8% of users.

8%

Voice assisted speakers

A very small white horizontal bar representing 4% of users.

4%

TV

A small white horizontal bar representing 7% of users.

7%

Other device

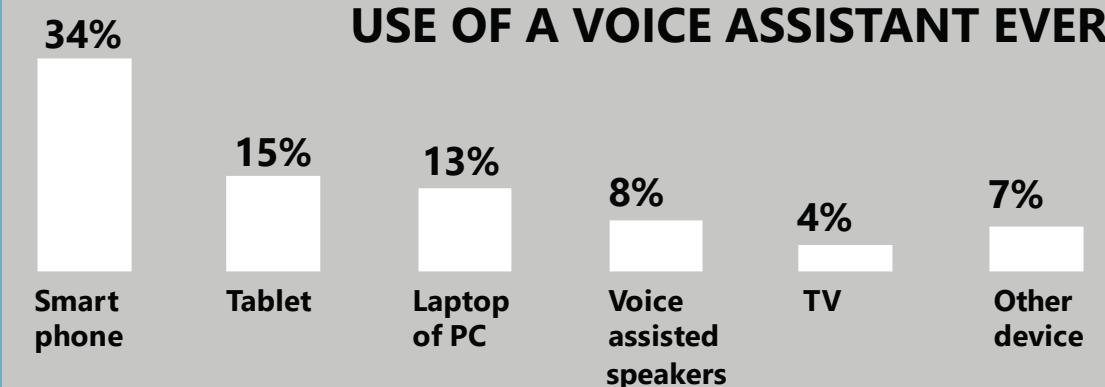
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# VOICE ASSISTANTS



Since Q1 2018,  
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21%  
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have one

**58%**  
agree that Voice  
Activated Speakers  
are the future; but

30% agree  
they do have  
concerns about my  
personal data

# USE OF VOICE ASSISTANTS

## The 5 reasons to use voice assistants on smart phone

To search for general information  54%

For weather updates  33%

To dial a person in your contact list  31%

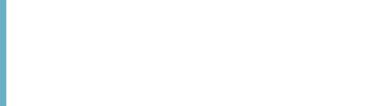
To set up alarms or timers  30%

To play music  28%



# USE OF VOICE ASSISTANTS

## The 5 reasons to use voice assistants on smart phone

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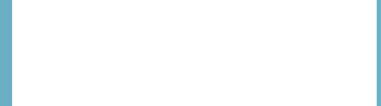
For weather updates  33%

To dial a person in your contact list  31%

To set up alarms or timers  30%

To play music  28%

## The 5 reasons to use voice assistants on smart assisted speakers

To play music  77%

For weather updates  59%

To search general information  50%

For amusement  45%

To set up alarms or other timers  41%

# FRictionless

**Talking to machines makes me feel uncomfortable**



■ Don't know ■ Disagree ■ Neither Agree nor Disagree ■ Agree



# FRictionless

**Talking to machines makes me feel uncomfortable**



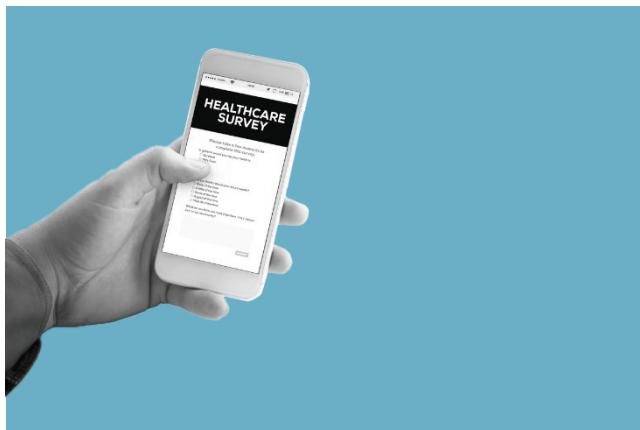
**Voice recognition isn't very good**



■ Don't know ■ Disagree ■ Neither Agree nor Disagree ■ Agree



# EXPLORATIONS IN MARKET RESEARCH



**Voice based data collection**

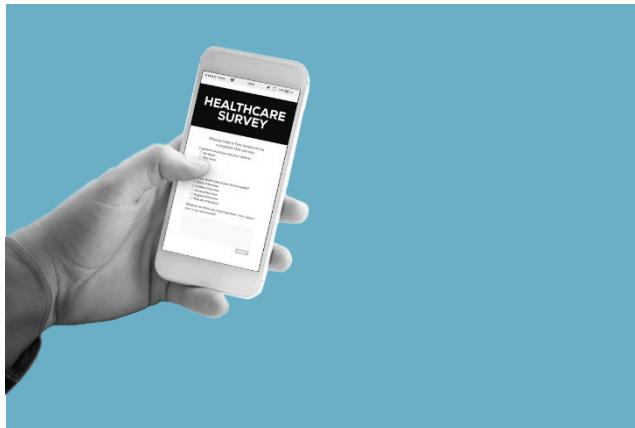


**Voice based reporting**

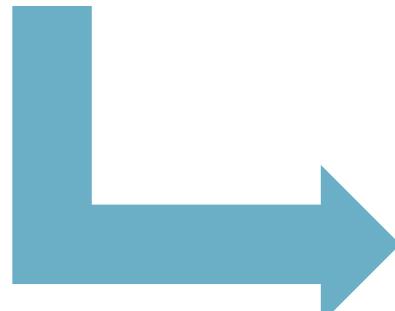


**How we interact with VAs**

# EXPLORATIONS IN MARKET RESEARCH



**Voice based data collection**

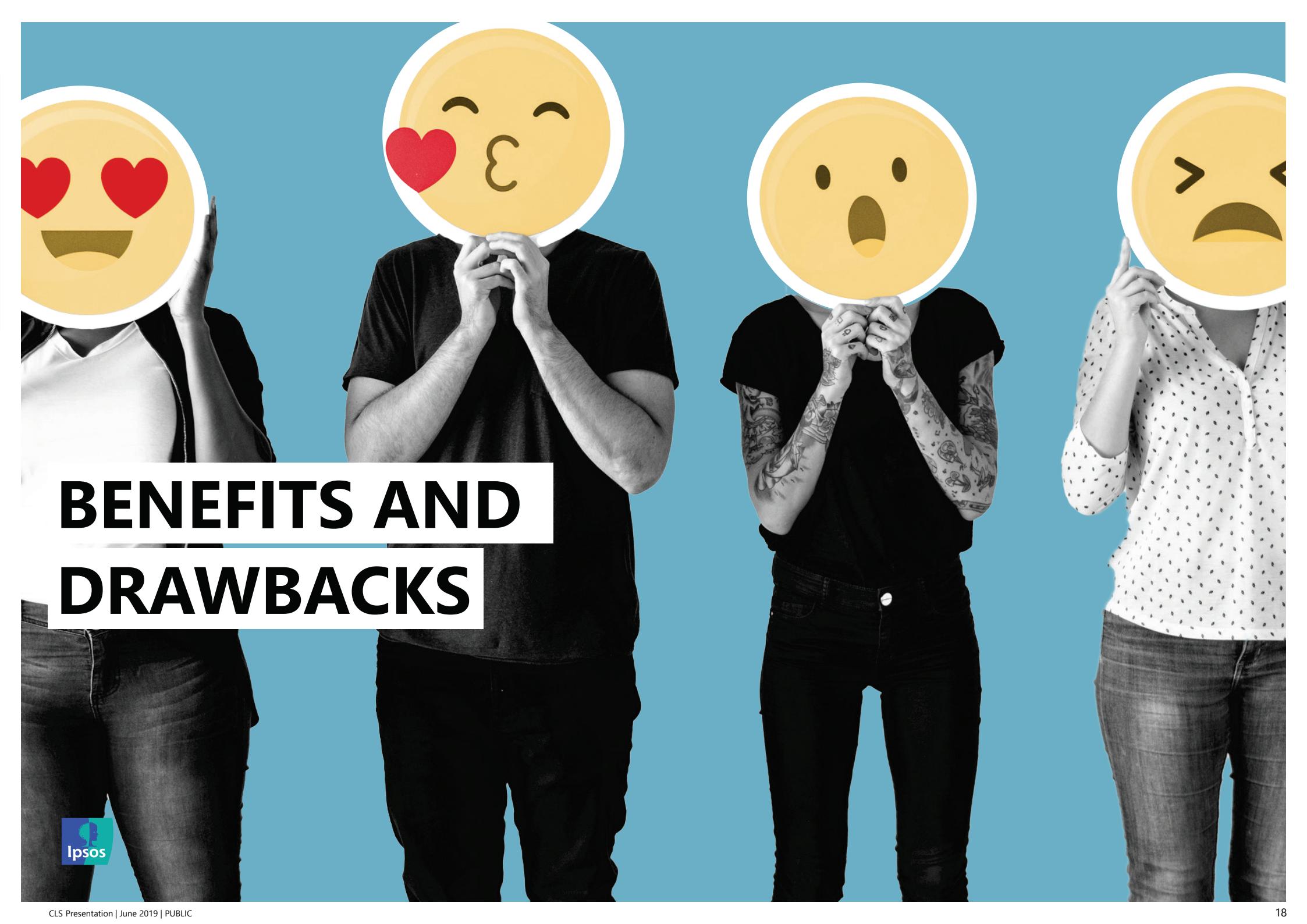


**Voice based reporting**



**How we interact with VAs**

- One off, less structured, surveys?
- Better use of open questions for depth?
- Diaries



# BENEFITS AND DRAWBACKS



# CASE STUDY

**How can a large  
and traditional  
diary survey like  
RAJAR work better  
via Voice?**



# RAJAR SURVEY

**Radio Joint Audience Research survey is the official body  
in charge of measuring radio audiences in the UK**

Continuous placement of diaries for 50 weeks per year = 100,000

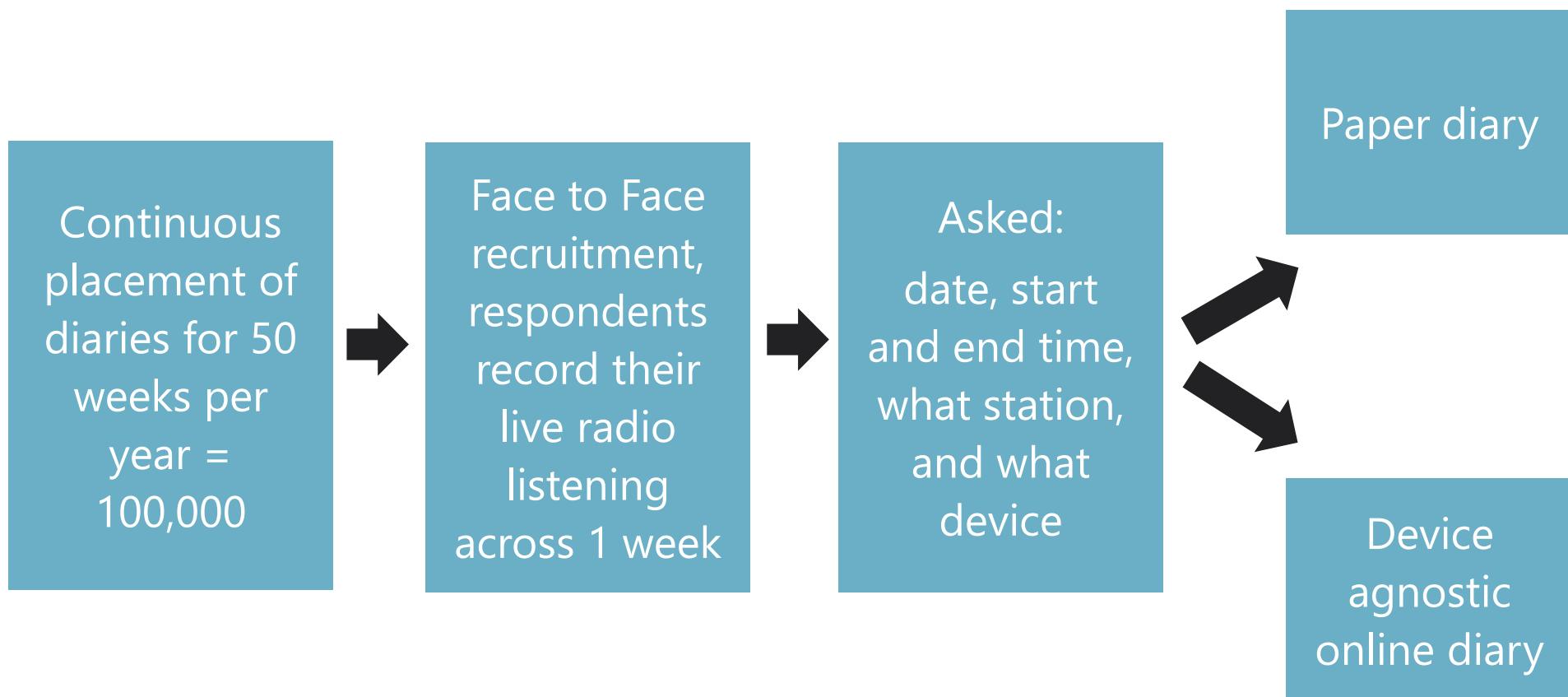


Face to Face recruitment, respondents record their live radio listening across 1 week



# RAJAR SURVEY

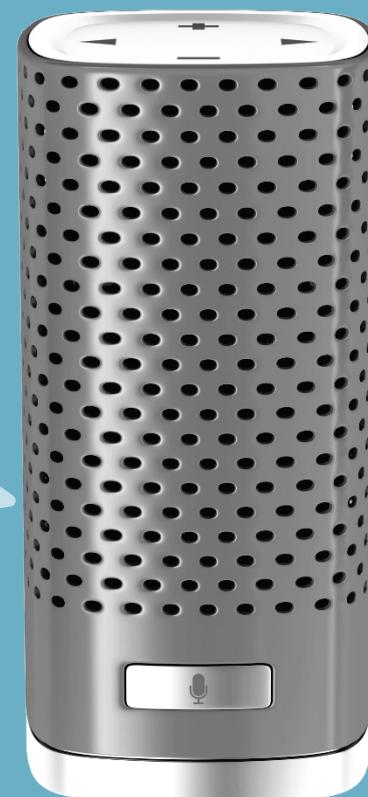
**Radio Joint Audience Research survey is the official body  
in charge of measuring radio audiences in the UK**



**The opportunity is greater than text to voice, and voice to text.** Natural Language Processing and AI allow for intelligent conversations; text analytics allows for rich insight from unstructured data.



**The hardware will continue to evolve.** Including Connected TVs, Voice Assistants with screens. Increases touchpoints and allows for validation or stimulus.



**It has the potential to improve data quality.** Ease of use likely to yield higher number of responses, potentially closer to the time; AI allows for in-built quality checks and validation



**Potential for longitudinal studies complements not replaces interviewers.** In near future, most useful for capturing repeat activities – exercise, food, media habits, emotional wellbeing.



Thank you.

