Ofcom Voice Assistants Brands Research 2024

Technical Report

Report

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Overview

This study aims to understand the extent of Voice Assistant (VA) usage among the UK public, with a particular focus on how VAs are used for radio listening. It also explores the use of VAs for radio playback in cars and examines whether users encounter any technical issues with VA performance in this context. The findings will provide insights into user behaviour.

Research Objectives

- **Identify device preferences and VA usage:** Determine which devices people use to access Voice Assistants and how frequently they use them to listen to the radio, particularly in cars.

- **Analyse in-car VA radio usage**: Explore how often VAs are used to listen to the radio while driving, focusing on patterns and user behaviours.

- **Evaluate VA accuracy for radio playback**: Assess how often VAs return the correct radio station when requested, especially in a car setting.

Summary of Approach

YouGov is a professional research and consulting organisation, focused on collecting high quality, in-depth data for market research and has extensive experience of youth, the television and radio broadcasting sectors as well as on-demand services policy research.

This research was conducted with a sample of respondents that is politically representative of the UK population aged 16 and above. All research was carried out online, with respondents recruited from YouGov's online panel.

A total of 4,040 interviews were conducted in this study. Fieldwork was conducted between 17th-23rd September 2024

Questionnaire design

The questionnaire for the research was designed by Ofcom and reviewed by YouGov to ensure the questions would translate successfully online. The questionnaire was structured to ensure that respondents were only asked about voice assistants relevant to the devices they reported using. For instance, Samsung Bixby was only asked of respondents who indicated they use Samsung devices, while Apple Siri was exclusively queried among those who reported using Apple devices. Similarly, respondents were not asked about voice assistants incompatible with their device ecosystem, such as Microsoft Cortana on smartphones.

This targeted approach ensures the accuracy of the data by focusing solely on voice assistants applicable to each respondent's device. As a result, tables for voice assistants that are irrelevant to certain devices were excluded from the analysis, as no data was gathered for those scenarios. The decision to omit these inapplicable tables enhances the clarity of the report, ensuring that the analysis remains focused on voice assistant usage relevant to each device category.

Significance testing and data redaction

Significance testing has been applied at 95% for the purposes of analysis.

All base sizes below 10 have been redacted/removed from the data tables completely. Base sizes between 10-49 are marked with an * to indicate a low base.

Sample design

The sample is designed to be nationally representative of the UK population aged 16 and above in terms of political alignment.

A sample frame was constructed using the demographic information available from the YouGov online panel, which consists of over 3.3 million adults in the UK. This frame includes individuals aged 16 and above, as well as relevant demographic and political attributes to ensure representativeness.

A total sample of 4,040 respondents was interviewed. This sample size was determined to provide a high level of statistical confidence and reliability for the survey results.

Selected individuals were invited to participate in the survey via email. Participants consented to complete the survey, understanding that their responses would be used for research purposes.

The survey was administered online, utilising YouGov's survey platform. Participants were provided with a modest financial incentive upon completion.

Quotas

Interview quotas were applied so that the final sample was nationally representative of all UK adults aged 16+ by age, gender and education level (interlocked), region, and social grade/socio-economic group (SEG), using an online sample.

Targets for quotas were derived from YouGov based on data from the Office of National Statistics (ONS).

Quotas were set using the following variables:

- Age (16-24, 25-39, 40-49, 50-65, Over 65)

- Gender

- Region

- Social grade/Socio-economic group (SEG)

- Education level

Weighting

The data was weighted to be nationally representative of the UK 16+ population on age, gender and education level (interlocked), and overall, to the region and SEG profiles, using an online sample.

Demographic breakdown

Table 1: demographic breakdown of the sample

Demographic group	Category	Weighted Counts	Weighted Percentages
Total sample	All respondents	4,040	-
Gender	Male	1,959	49%
	Female	2,081	52%
Age	16-24	545	14%
	25-34	628	16%
	35-44	690	17%
	45-54	624	15%
	55-64	648	16%
	65+	905	22%
Region	Scotland	339	8%
	North East	160	4%
	North West	442	11%
	Yorkshire & Humberside	339	8%
	West Midlands	348	9%
	East Midlands	303	7%

Demographic group	Category	Weighted Counts	Weighted Percentages
	Wales	194	5%
	East of England	349	9%
	London	529	13%
	South East	551	14%
	South West	376	9%
	Northern Ireland	109	3%
Social Grade	ABC1	2303	57%
	C2DE	1737	43%

NET definitions featured in published tables

Certain subgroups within the sample were grouped together to aid analysis and are featured alongside this report in the published data tables. The definitions of these so-called NETs are in the table below.

Table 2: NETs created for analysis

Category	NET	Definition
Demographic NETs		
Employment status	NET: Working	Working full time (30 or more hours per week)
		Working part time (8 - 29 hours per week)
		Working part time (Less than 8 hours a week)
	NET: Not working	Full time student
		Retired
		Unemployed
		Not working
		Looking after the home and/ or family
		Full time carer
		Receiving sickness benefit
		Other
Parents/Non-Parents	NET: All parents	Under 6 months old
		Between 6 and 12 months old
		1 year old
		2 years old

Category	NET	Definition
		3 years old
		4 years old
		5 years old
		6 years old
		7 years old
		8 years old
		9 years old
		10 years old
		11 years old
		12 years old
		13 years old
		14 years old
		15 years old
		16 years old
		17 years old
		18 years old
	NET: All parents (children under 18)	Under 6 months old
		Between 6 and 12 months old
		1 year old
		2 years old
		3 years old
		4 years old
		5 years old
		6 years old
		7 years old
		8 years old
		9 years old
		10 years old

Category	NET	Definition
		11 years old
		12 years old
		13 years old
		14 years old
		15 years old
		16 years old
		17 years old
	NET: Non-parents	Not applicable - I do not have any children
Social Networks - used last month	NET: Meta	Facebook
		Instagram
		Threads
Messaging apps used in last 30 days	NET: Meta	Facebook messenger
		WhatsApp
Question NETs		
Q1b_a/b/c/d/e/f/g/h/i	NET: Apple users	Apple smartphone
		Apple smart speaker
		Apple tablet
		Apple laptop
		Apple PC (a desktop computer)
		Apple TV set top box
		Apple smart watch/fitness tracker
	NET: Samsung users	Samsung smartphone
		Samsung smart speaker
		Samsung tablet
		Samsung laptop
		Samsung smart TV
		Samsung smart watch/fitness tracker
	NET: Google Users	Google smartphone
		Google smart speaker
		Google tablet
		Google laptop
		Google PC
		Google Streaming Stick/Connected TV Device
		Google smart watch/fitness tracker
	NET: Android Users	Samsung smartphone
		Samsung smart speaker

Category	NET	Definition
		Samsung tablet
		Samsung laptop
		Samsung smart TV
		Samsung smart watch/fitness tracker
		Google smartphone
		Google smart speaker
		Google tablet
		Google laptop
		Google PC
		Google Streaming Stick/Connected TV Device
		Google smart watch/fitness tracker
		Amazon tablet
		Motorola Smartphone
Q3a-Q3f	NET: Listen to the radio on any device	Selects **code 1. To listen to radio stations** for any of:
		Smartphone
		Smart speaker
		Tablet
		Laptop
		PC (a desktop computer)
		Smart TV
		Set-top box connected to your TV
		Streaming stick / other connected TV device
		Smart watch or fitness tracker
	NET: Not listened to radio on any device	Does **not** select CODE 1. TO LISTEN TO RADIO STATIONS for any of:
		Smartphone
		Smart speaker
		Tablet
		Laptop
		PC (a desktop computer)
		Smart TV
		Set-top box connected to your TV
		Streaming stick / other connected TV device
		Smart watch or fitness tracker
	NET: Listen to other types of audio	Selects CODE 2. TO LISTEN TO OTHER TYPES OF AUDIO SUCH AS MUSIC STREAMING SERVICES, PODCASTS OR OTHER ON-DEMAND AUDIO CONTENT for any of:
		Smartphone
		Smart speaker
		Tablet

Category	NET	Definition
		Laptop
		PC (a desktop computer)
		Smart TV
		Set-top box connected to your TV
		Streaming stick / other connected TV device
		Smart watch or fitness tracker
	NET: Any Other	Selects CODE 3. OTHER for any of:
		Smartphone
		Smart speaker
		Tablet
		Laptop
		PC (a desktop computer)
		Smart TV
		Set-top box connected to your TV
		Streaming stick / other connected TV device
		Smart watch or fitness tracker
	NET: Not used for any device	Selects CODE 4. N/A – NOT USED ON THIS DEVICE for any of:
		Smartphone
		Smart speaker
		Tablet
		Laptop
		PC (a desktop computer)
		Smart TV
		Set-top box connected to your TV
		Streaming stick / other connected TV device
		Smart watch or fitness tracker
Q4a-Q4f	NET: Daily	Daily
	NET: Weekly users	Daily
		At least weekly
	NET: Monthly users	Daily
		At least weekly
		At least once a month
	NET: Less than once a month	Less than once a month
Q5	NET: Used any VA in a car for radio	Select code 1. Yes for any VA
	NET: Not used any VA in a car to listen to the radio	Select code 2. No for any VA
	NET: Any device with weekly issues	At least once a day
		At least once a week
		At least once a day

Category	NET	Definition	
	NET: Any device with monthly issues	At least once a week	
		At least once a month	

Definitions of filtered data tables

To gain more detailed insights, subgroups of key brand users were identified based on the natural fallout within the nationally representative sample. This allowed us to create filtered versions of the main data tables, highlighting the experiences of each key user group with Voice Assistants. The key user subgroups included Android Users, Apple Users, Google Users, and Samsung Users. Definitions of these subgroups are provided in the table below.

Table 3: definitions created for the bases of the filtered tables

Usage by Brand	Definitions based on the usage of the following brands x devices	Natural fall out in the Nat Rep (UK 16+)
Android Users	**Google:** Smartphone, Smart Speaker, Tablet, Laptop, PC, Streaming Stick/Connected TV Device, Smartwatch/Fitness Tracker **Samsung:** Smartphone, Smart Speaker, Tablet, Laptop, Smart TV, Smartwatch/Fitness Tracker **Motorola:** Smartphone **Amazon:** Tablet	**N=2400**
Apple Users	**Apple:** Smartphone, Smart Speaker, Tablet, Laptop, PC, TV Set Top Box, Smartwatch/Fitness Tracker	**N=1929**
Google Users	**Google:** Smartphone, Smart Speaker, Tablet, Laptop, PC, Streaming Stick/Connected TV Device, Smartwatch/Fitness Tracker	**N=564**
Samsung Users	**Samsung:** Smartphone, Smart Speaker, Tablet, Laptop, Smart TV, Smartwatch/Fitness Tracker	**N=1924**