Voice Search Ranking Report

FMCG Brands

September 2021

A

Intro

This report has been created using data from Rabbit & Pork's Voice Search Ranking Report tool. The tool automatically asks voice assistants a question and records the answer. For each voice search we track if it was answered and the type of answer (Local, Answer Box, News etc).

How we collected our findings

- Google Assistant only

- Device with a screen (Google Nest Hub)

- Location: London

- Language: English

- 93 FMCG Brands. These brands were sourced from YouGov's top 100 UK consumer brands. Seven brands were removed as there was less than 100 voice search key phrase for the brand / product"

- 26,686 voice searches

- Average 294 per brand

Example voice searches

- Alpro baby milk

- Aunt Bessie Yorkshire pudding recipe

- Are Doritos vegan?

- Can galaxy chocolate be melted?

- What's in Warburtons bread?

B

Consumer Adoption of Voice Technology

The UK consumer has fallen in love with smart speakers. Only five years since Amazon Echo was first released in 2018, 38% of adult Brits are now Smart Speaker owners. Despite US consumers having a two-year head start on smart speakers, the UK has now overtaken them and become the leading users of the technology. The dramatic growth is set to continue, with UK consumers who don't currently own a smart speaker being considerably more likely than their US or German counterparts to say they are likely to buy one in 2021.

The UK is leading in terms of both adoption and usage, and the pandemic has only increased usage with 55% of UK smart speaker owners using their devices more since the start of the pandemic.

As smart speaker manufacturers shift their attention from market penetration towards depth of usage, we can expect consumers to start using their devices for increasingly diverse and complex tasks. The shift towards smart speakers with screens will help enable this shift. 18% of UK smart speaker owners now have 'smart display' devices and we expect this share to keep growing.

Consumers' privacy concerns were once stated as a major expected stumbling block for smart speakers, but this fear has been someone overblown with only 44.7% UK consumers saying that they were 'moderately' or 'very' concerned about smart speaker privacy.

As smart speaker adoption continues to grow and users begin to perform more complex tasks with their devices, it is becoming essential that brands have a robust strategy for what should now be considered a mass-market channel.

30%

of UK consumers have used voice search in the past month

38%

of UK adults are smart speaker users

55%

of UK smart speaker users increased usage through the pandemic

$4.6

billion predicted global voice assistant transaction values in 2021
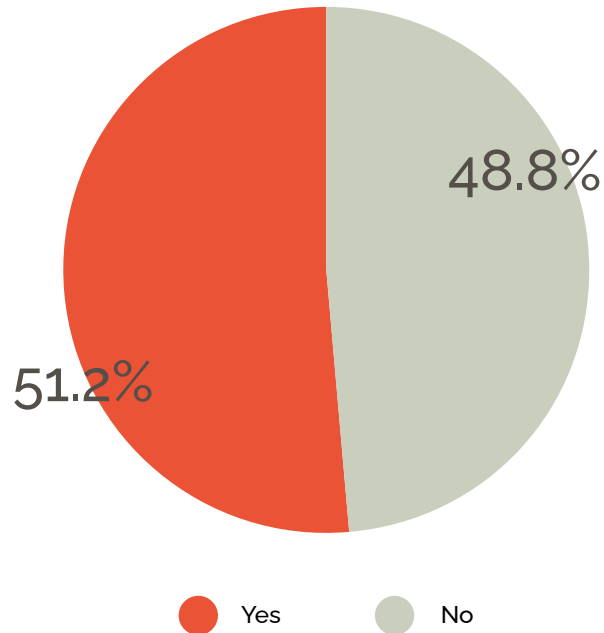
Sources: GWI, Voicebot.ai, Juniper Research

Executive Summary

At the time of writing this report it was clear to see that companies and brands still have a long way to go with just over half the questions being answered by the Google Assistant.

Percentage of questions the Google Assistant answered

48.8%

51.2%

⬤ Yes   ⬤ No

The top performing brand in the report was **Coca Cola** with **68.8%** of the questions asked being answered.

The lowest performing brand was **Bold** at the bottom with only **23.7%** of the questions being answered.

The difference in performance comes down to two factors:

01 The amount and quality of content that has been *published by the brand on their own website.*

02 The amount and quality of content that has been published externally about the brand – e.g. news publications, recipe websites. (The bigger the brand the more likely this is to happen).

The table below shows the top and bottom five brands in order of how likely the Google Assistant was to be able to answer questions asked about them.

Top Five	Brand	Bottom Five	Brand
1	Coca-Cola	89	Cushelle
2	Monster Energy	90	Napolina
3	Doritos	91	John West
4	Quorn	92	finish
5	Rowntrees	93	Bold 2in1

Taking control of your voice search results

A key finding from this report that brands need to be aware of is that they do not always have control over their voice search results and voice visibility score.

Most often we saw Google using Answer Box Results to provide voice search results. Answer Box Results are visible in traditional web search results, and for voice Google simply reads out the content and attributes it to a website. The user also sometimes has a link for the web page that provided the answer sent to their phone. Examples can be seen below:

The Search query
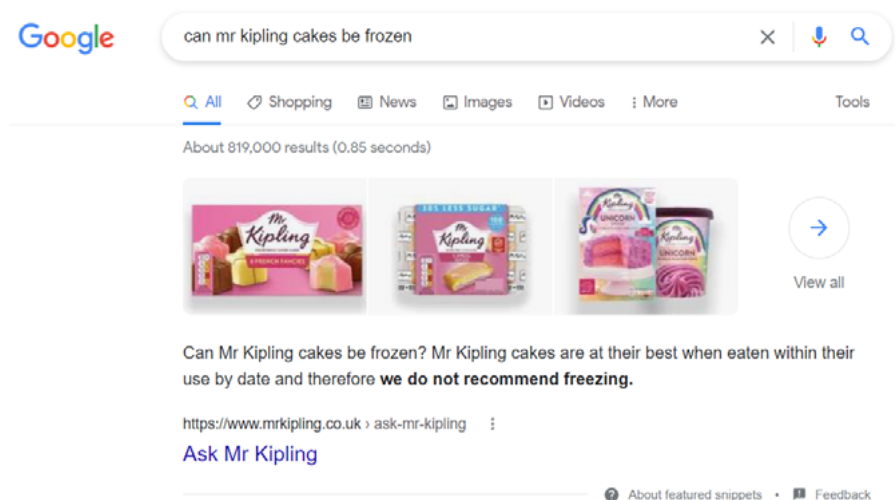
The Voice query

Can Mr Kipling cakes be frozen?

The result

*"On the website **mrkipling.co.uk**, they say: Mr Kipling cakes are at their best when eaten within their use by date and therefore we do not recommend freezing."*

The Mr Kipling example above is an instance of a best case scenario, with Google reading out an accurate answer sourced form the brand's official website. However, what is concerning for brands is that for 85.7% of the results returned in this study, Google did not read out information from the brands' official sites.

Percentage of owned vs non-owned results

14.3%

85.7%

● Owned　　　　● Not Owned
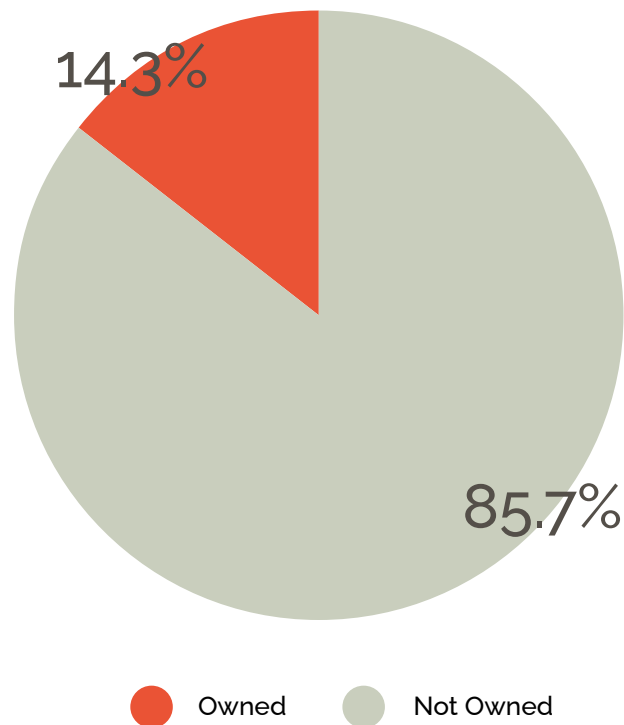
Example non-owned result
Are walkers crisps vegan?

Answer

*"On the website **allplants.com**, they say: The majority of Walkers crisps are in fact suitable for vegans, even a few of the flavours you might not have expected" we're talking about you, Prawn Cocktail and Roast Chicken!"*

Compared to an owned result
Can Lenor bottles be recycled?

Answer

*"On the website **lenor.co.uk**, they say: Lenor transparent bottles are made of 100% recycled plastic and are fully recyclable, where collection and recycling facilities are available."*

While Coca Cola perform well overall with 68.8% of voice searches being answered, they only control 0.63% of these results using their official UK website.

It's important to note that we did often find the official Australian and American Coca Cola websites ranking. Our check was for the UK website. This could mean the UK website lacks content or has problems around international targets which results in the UK website being outranked by the Australian and American versions.

Interestingly, Cathedral City came out on top in this section owning 45.95% of their Answer Box Results. This was due to their simple but well setup FAQ page.
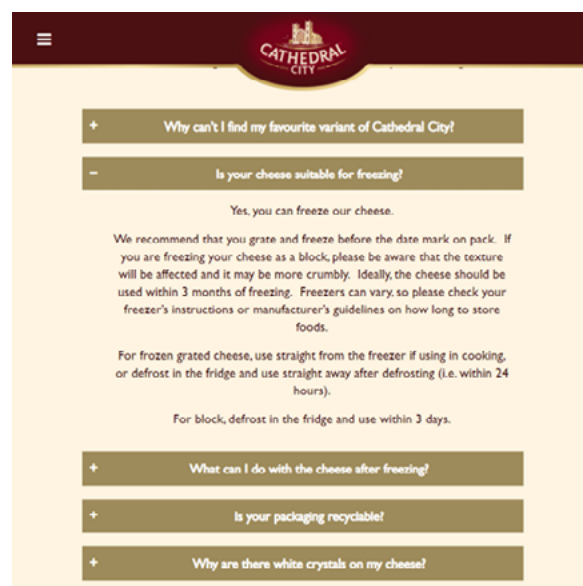
Image 6: Cathedral City FAQ page (cathedralcity.com)

Brands should be concerned about not owning voice searches related to their brand and products for several reasons:

- Misinformation about their product

- Out of date information

- Negative reviews about their product

- Google not giving an answer to a question

It's not all about Answer Box Results

In the report when google provided an answer, 56.5% of the results were Answer Box Results (ABR), however we found that Google is also delving into other sources of information.

56.5% ABR

16.1% Images

15.2% Location

4.1% Knowledge Graph - Wiki

3.1% Recipe

2.3% Knowledge Graph

1.9% Video

0.3% Pronounciation

0.2% Definition

0.4% Other
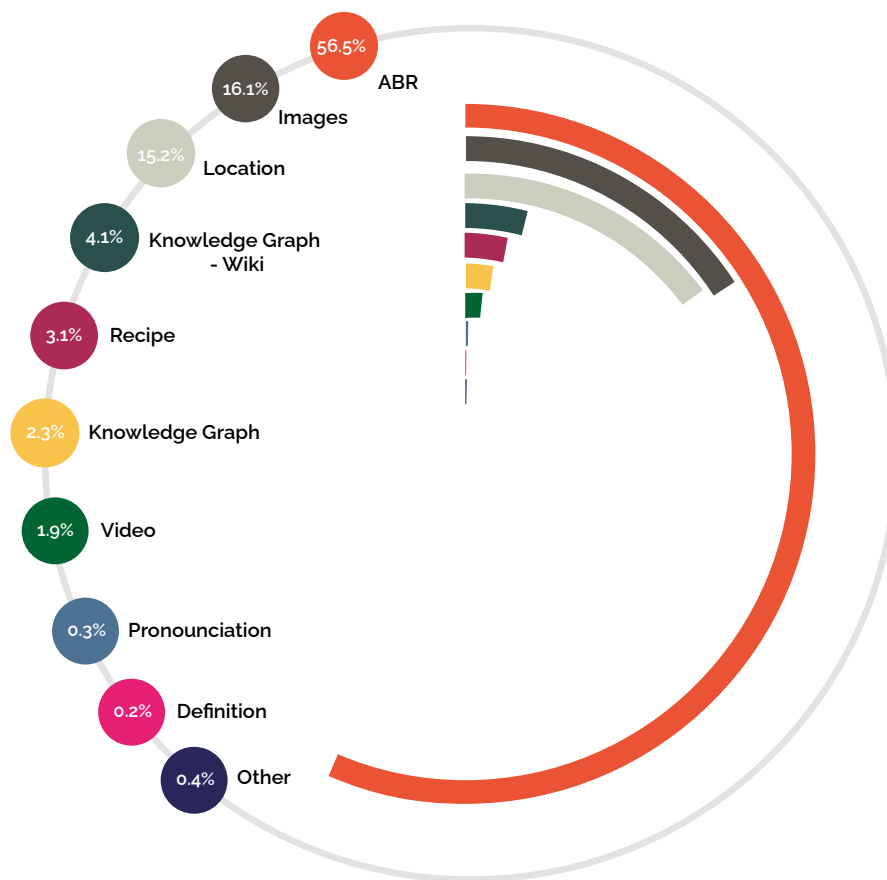
In total there was 16 different types of results in the report. Our previous reports **have come across 37 distinct types of results.**, however in this report we will focus on four of these result types.

Images

Our voice search ranking reports software is able to simulate different options when performing searches such as location, language and device type. In this report, we were running as if we were using a device with a screen, such as the Google Nest Hub.

Image results on the whole were for the shorter product voice searches, rather than the longer question searches.
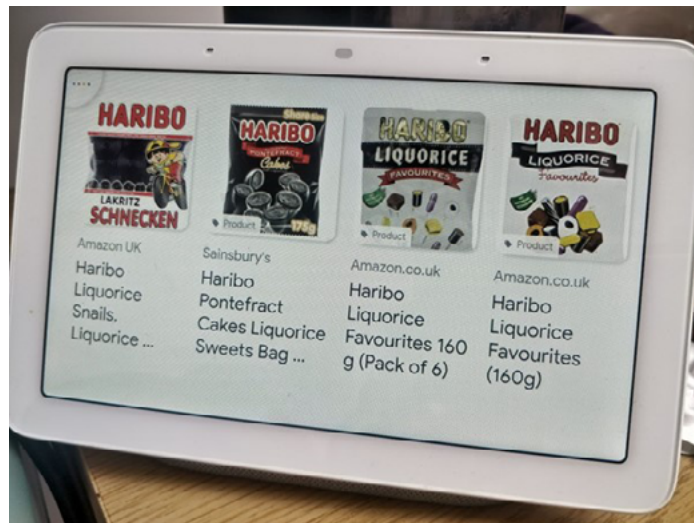
The picture above shows the results for a voice search for "Haribo Liquorice". Here this would match the "image snippet" on the search results for the same phrase.
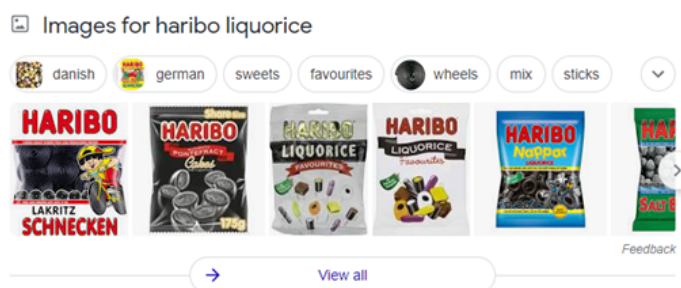
Clicking on one of the results opens a page with more information about the product, a second click on the product then opens the Sainsburys website.
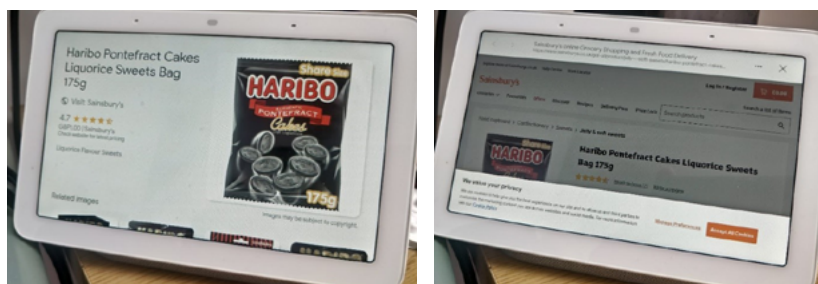
A browser opens up on the Nest, the user can then click and move around th Sainsburys website. However, there is no input so you cannot login to the website to make an order.

Location

Google has great location data on companies thanks to an integration with Google My Business and it can easily provide answers about addresses and opening times. Answers about addresses and opening times are all possible.

We often see Google using location results to suggest shops where you can buy products. For example:

Voice search

Where can I buy Cushelle toilet rolls?

Answer

"I found a few Supermarkets near you. The 1st one is Tesco Superstore at 825 High Road Leyton, London. The 2nd one is Waitrose & Partners Stratford London at Ground Floor, The Arcade 1 Lower, London. The 3rd one is Tesco Superstore at 55 Morning Lane, London."

With many FMCG brands not having physical stores they are reliant on supermarkets and shops to provide listings for these rankings.

The accuracy of these listings are not to be 100% trusted. For example, there is no link between a product feed from store locations and the Google Assistant, so those particular stores have not explicitly said that they have Cushelle toilet roll in stock.

Locations on Google My Business can submit a product feed of what is in stock at a store, However, our tests show that the Google Assistant in the UK isn't able to access this information. The below image displays an example of Boots using the product editor to tell Google what products are in stock, however this information isn't accessed by the Google Assistant according to our tests.
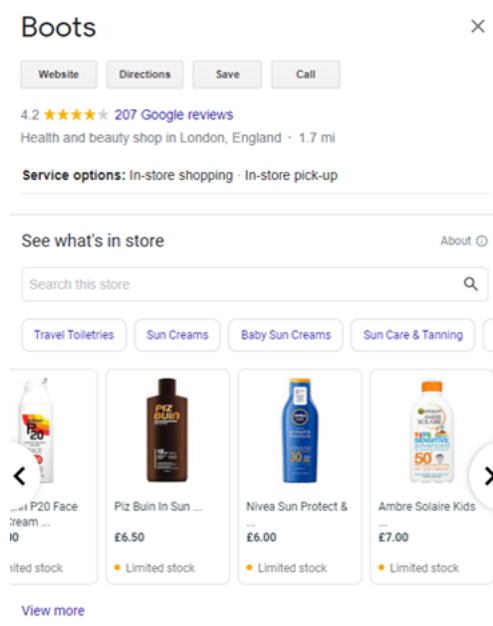
Knowledge Graph

Google has always seen Wikipedia as a trusted source, so it was no surprise to see Wikipedia.org being the top-ranking domain for answer box results.
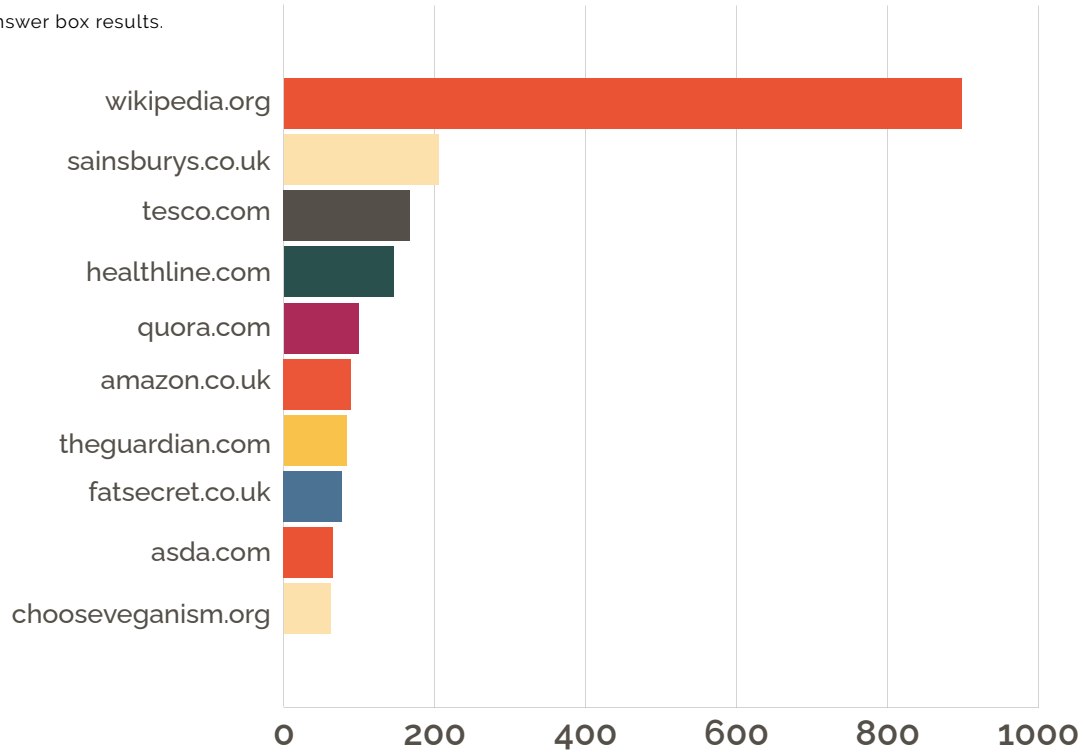
Top ranking domains for answer box results

Editing Wikipedia pages is a complicated process for brands. It is discouraged to edit your own brand page as page content should be unbiased. The full details around editing can be found at Wikepedia.org. With Wikipedia being so dominant, it is bound to rank for some of your search terms.

Recipe

The fifth most popular result type was recipe results. These are where the Google Assistant suggests a recipe from a website. If the user likes the recipe, the Assistant can then give the user ingredients and instructionss. Example below:

Voice search

Aunt Bessie's Toad in the Hole recipe

Answer

"Got it. I've got a recipe called "Mums proper Toad in the Hole" from BBC Good Food. This recipe serves four and takes about one hour to make. Does that sound good?

To gain these types of results, brands first need to publish recipes on their website, but also must add recipe schema to the page. This information splits out the different elements of the recipe (cooking time, ingredients, steps etc).

In the report we see some brands excelling in recipe results. Interestingly, three brands appearing in the top 10 can all be considered ingredients: Quorn, Hellman's and Lurpak.

Top ranking domains
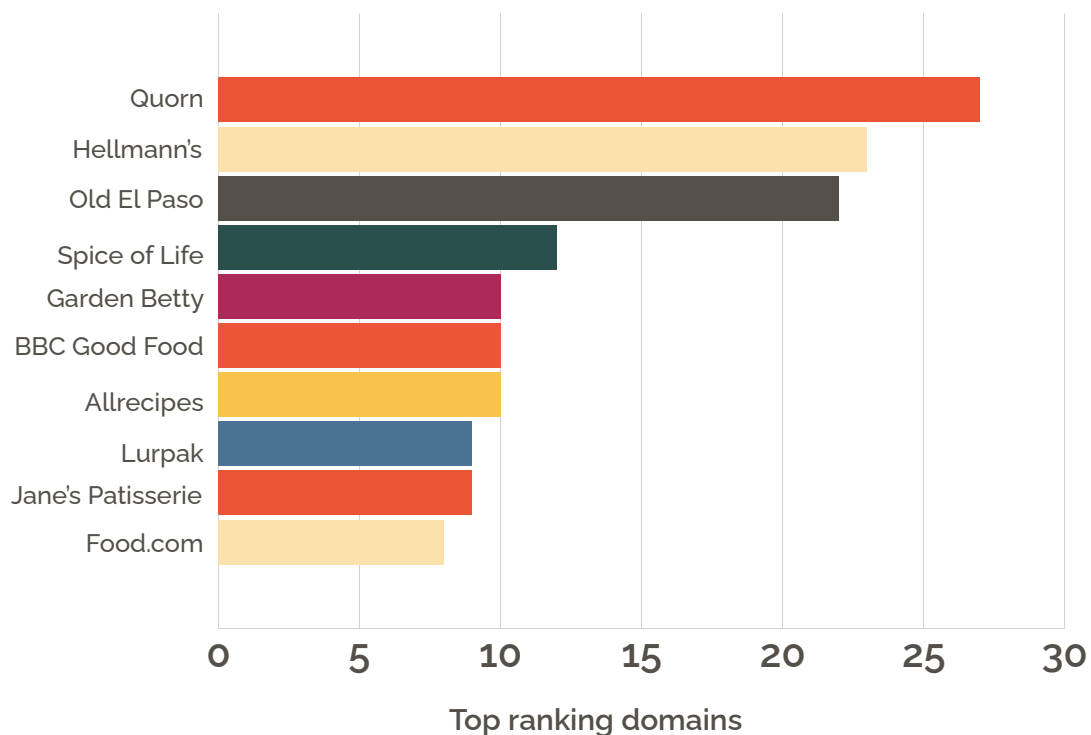
E

All Brands
Ranked

The table below ranks the brand according to % of answered.

Rank	Brand	Answered	No Answer	Total Voice Searches	Answered %
1	Coca Cola	260	119	379	69%
2	Monster	296	159	455	65%
3	Doritos	238	128	366	65%
4	Quorn	229	124	353	65%
5	Rowntree's	64	35	99	65%
6	Pepsi	234	128	362	65%
7	Mars Bar	199	108	308	65%
8	Uncle Ben's	183	103	286	64%
9	Irn Bru	206	116	322	64%
10	Fanta	221	125	346	64%
11	Dr Pepper	228	129	357	64%
12	Magnum	190	109	299	64%
13	Wrigley	209	120	329	64%
14	M&M's	188	116	304	62%
15	Red Bull	377	235	612	62%
16	Lucozade	220	138	358	61%
17	Walkers	219	142	361	61%
18	Cadbury	217	144	361	60%
19	Heinz	224	150	374	**60%**
20	Tropicana	214	144	358	60%

Rank	Brand	Answered	No Answer	Total Voice Searches	Answered %
21	Schweppes	195	133	328	59%
22	Kinder	201	138	339	59%
23	Evian	195	134	329	59%
24	Haribo	215	149	364	59%
25	Young's Seafood	79	55	134	59%
26	Galaxy	167	118	285	59%
27	Mcvities	180	130	310	58%
28	Hula Hoops	188	136	324	58%
29	Lindt	203	147	350	58%
30	Hellman's	179	130	309	58%
31	Nestle	216	158	374	58%
32	Pringles	212	156	368	58%
33	Vimto	192	142	332	57%
34	Weetabix	200	148	348	57%
35	Muller	80	60	140	57%
36	Dolmio	154	116	270	57%
37	Pot Noodle	172	130	302	57%
38	Ferrero	193	146	339	57%
39	McCain	161	125	286	56%
40	Bisto	137	109	246	56%

Rank	Brand	Answered	No Answer	Total Voice Searches	Answered %
41	Ribena	174	142	316	55%
42	Kingsmill	154	126	280	55%
43	Innocent	125	108	233	54%
44	Nescafe	190	180	370	51%
45	Danone	168	166	334	50%
46	Rustlers	130	130	360	50%
47	Warburtons	143	143	286	50%
48	Hovis	147	148	295	50%
49	Maltesers	167	171	338	49%
50	Dairylea	118	123	241	49%
51	Mr Kipling	132	140	272	49%
52	Pedigree	133	145	278	48%
53	Persil	155	171	326	48%
54	Kelloggs	173	193	366	47%
55	Birds Eye	80	90	170	47%
56	Highland Spring	97	115	212	46%
57	Anchor	122	145	267	46%
58	Kleenex	155	190	345	45%
59	Lurpack	136	167	303	45%
60	Princes Tuna	58	72	130	45%

Rank	Brand	Answered	No Answer	Total Voice Searches	Answered %
61	Tilda Rice	110	143	253	43%
62	Aunt Bessie's	107	141	248	43%
63	Batcherlors	67	89	156	43%
64	Arla	124	167	291	43%
65	Volic	107	149	256	42%
66	Yorkshire Tea	126	181	307	41%
67	Duracell	143	206	349	41%
68	Ginsters	90	131	221	41%
69	Old El Paso	112	165	277	40%
70	Twinnings	122	186	308	39%
71	Andrex	104	161	265	39%
72	Lenor	120	187	307	39%
73	Whiskas	116	181	297	39%
74	Ben & Jerry's	112	175	287	39%
75	Robinsons	105	165	270	39%
76	PG Tips	106	170	276	38%
77	Yeo Valley	93	153	246	38%
78	Kenco	100	172	272	37%
79	Fairy	69	121	190	36%
80	Fever-Tree	108	190	298	36%
81	Chicago Town	62	111	173	36%

Rank	Brand	Answered	No Answer	Total Voice Searches	Answered %
82	Purina	117	218	335	45%
83	Dr Oetker	88	166	254	35%
84	Cathedral City	53	100	153	35%
85	Alpro	109	210	319	34%
86	Comfort	66	129	195	34%
87	Surf	58	123	181	32%
88	Maynards Bassetts	38	83	121	31%
89	Cushelle	64	150	214	30%
90	Napolina	59	143	202	29%
91	John West	75	187	262	29%
92	Finish	18	49	67	27%
93	Bold	35	111	146	24%

The table below ranks the brands according to the % of answer box results owned.

Rank	Brand	% of ABR Owned	Rank	Brand	% of ABR Owned
1	Cathedral City	45.95%	21	Kleenex	26.14%
2	Andrex	42.62%	22	Duracell	25.53%
3	Lenor	41.51%	23	Birds Eye	25.00%
4	Napolina	41.03%	24	Alpro	25.00%
5	Lindt	38.64%	25	Fever-Tree	24.32%
6	Yeo Valley	37.84%	26	Danone	23.81%
7	Yorkshire Tea	36.71%	27	Evian	23.53%
8	Dairylea	36.07%	28	Old El Paso	22.73%
9	Young's Seafood	36.00%	29	Whiskas	22.73%
10	Twinnings	34.21%	30	Hellmann's	21.51%
11	Tilda Rice	33.77%	31	Lurpak	19.57%
12	Magnum	33.33%	32	Volvic	19.30%
13	Anchor	33.33%	33	Aunt Bessie's	19.23%
14	John West	33.33%	34	Rustlers	18.92%
15	McCain	32.10%	35	Hovis	18.42%
16	Ben & Jerry's	31.43%	36	Ribena	17.59%
17	Quorn	30.99%	37	Weetabix	16.99%
18	Warburtons	29.87%	38	Persil	16.13%
19	Princes Tuna	28.85%	39	Ginsters	16.00%
20	Nescafe	27.56%	40	Rowntree's	15.63%

Rank	Brand	% of ABR Owned	Rank	Brand	% of ABR Owned
41	Purina	14.71%	61	Uncle Ben's	7.69%
42	Dr Pepper	14.38%	62	M&M's	7.69%
43	Innocent	12.22%	63	PG Tips	7.59%
44	Vimto	12.15%	64	Surf	7.50%
45	Arla	12.12%	65	Heinz	7.20%
46	Cushelle	12.00%	67	Schweppes	6.98%
47	Ferrero	11.63%	68	Pringles	6.73%
48	Kelloggs	11.63%	69	Mr Kipling	6.67%
49	Red Bull	11.42%	70	Muller	6.52%
50	Robinsons	11.25%	71	Kinder	6.25%
51	Haribo	11.22%	72	Finish	5.56%
52	Dr Oetker	10.53%	73	Walkers	5.38%
53	Chicago Town	10.34%	74	Nestle	4.76%
54	Highland Spring	10.20%	75	Bisto	3.81%
55	Pot Noodle	9.84%	76	Pepsi	3.15%
56	Kenco	9.80%	77	Monster	2.96%
57	Dolmio	9.30%	78	Cadbury	2.56%
58	Irn Bru	9.09%	79	Tropicana	2.53%
59	Kingsmill	8.89%	80	Doritos	2.46%
60	Fairy	8.20%	81	Pedigree	2.30%
			82	Hula Hoops	1.72%

Rank	Brand	% of ABR Owned
83	Wrigley	1.14%
84	Galaxy	1.11%
85	Mcvities	1.10%
86	Coca Cola	0.63%
87	Mars Bar	0.00%
88	Fanta	0.00%
89	Lucozade	0.00%
90	Maltesers	0.00%
91	Batcherlors	0.00%
92	Comfort	0.00%
93	Maynards Bassetts	0.00%
94	Bold	0.00%

Our Recommendations for brands

Recommendation

Gain a greater understanding of how voice assistants answer voice searches.

How

Ask the voice assistant a selection of voice searches, compared to web results. Ask Rabbit & Pork about a custom Voice Search Ranking Report.

1

Recommendation

Create content on your which answers common customer questions.

How

Use Answer the Public to find common questions. Create content on an FAQ page or product page to answer the question.

2

Recommendation

Track and optimise the performance of answer boxes.

How

Use a tool such as Myposeo or Stat to track answer boxes, continue to tweak content, image, and HTML to gain the answer box.

3

Recommendation

Create a custom Alexa Skill or Google tion to answer customer questions. Add a call to action to product packaging.

How

Talk to the **Rabbit & Pork** team about running a workshop session to develop your idea for a custom voice app.

4

See the full data in our interactive report

You've read the whitepaper, why not now delve into the data in our interactive online report.

Filter by brand and compare brand performance. You can also view sample data from the report.

Head over to the **Rabbit & Pork website** to view.

Who are Rabbit & Pork?

Rabbit & Pork are the Voice Experience arm of the TIPi Group.

We build brand strategies where voice sits at the heart of consumer journeys.

Voice technology is changing the way we interact with the internet, digital content, brands, services and each other. It's an unbelievably exciting time and Rabbit & Pork are here to help you develop and deploy a voice strategy.

Using a data led approach tied with collaborative workshops we help brands understand the voice landscape and what they need to do to gain visibility in this new frontier.

From there we can work on the execution of said strategy such as the creation of Alexa Skills to Google Actions, reporting on voice visibility and distribution of your action / skill.

Some of our clients:

wearerabbitandpork.com

Contributors

John Campbell

Founder & Managing Director

John founded Rabbit & Pork in 2018 as the fourth agency and Voice Experience arm of TIPi Group. John is one of the most respected most thought-leaders in the UK on the subject of voice.

Jamie Ross-Skinner

Insights Manager

Jamie spearheads the central insights offering at TIPi Group. He provides data-led consumer-centric insights which inform client strategies across our full spectrum of agencies.

Christina Daskajiannis

Senior Marketing Executive

As design-lead for the marketing team, Christina works to ensure the continued and improved brand awareness of all TIPi Group brands including Rabbit & Pork.

Archie Buxton

Researcher

Archie joins us from Loughborough University, where he is a 2nd year Product Design Engineering Student. As a researcher for Rabbit & Pork, Archie contributes to the delivery of key projects.

Rabbit &Pork

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