

Find your voice

Sounding out the future of voice technology for brands

IAB UK | Ipsos MORI

Welcome to the Find Your Voice study

A primary research project by the IAB UK and Ipsos MORI

- Looking to the future and helping businesses prepare is one of the IAB UK's three key pillars helping to create a sustainable future for digital advertising
- We are doing this through future facing events, such as IAB Engage, consulting with the industry via the IAB Future Trends Advisory Group and conducting primary research into new technologies and industry innovations
- This study offers guidance to help brands identify opportunities and manage potential threats within the voice tech space

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Background

Why focus on voice?

- Current usage
- The increasing popularity of voice technology
- How the landscape of voice is increasingly complicated
- Potential disruption for brands



Why focus on voice?



Voice technology captivates our interest and imagination for many different reasons

Natural

Speech is a natural and emotionally laden form of communication

Embedded

Voice control is embedded in our culture. The Bible, Open Sesame and magic spells all illustrate voice control as being something special

Interesting

Science Fiction has showed the possible future development of voice technology, increasing people's excitement and expectations

Impactful

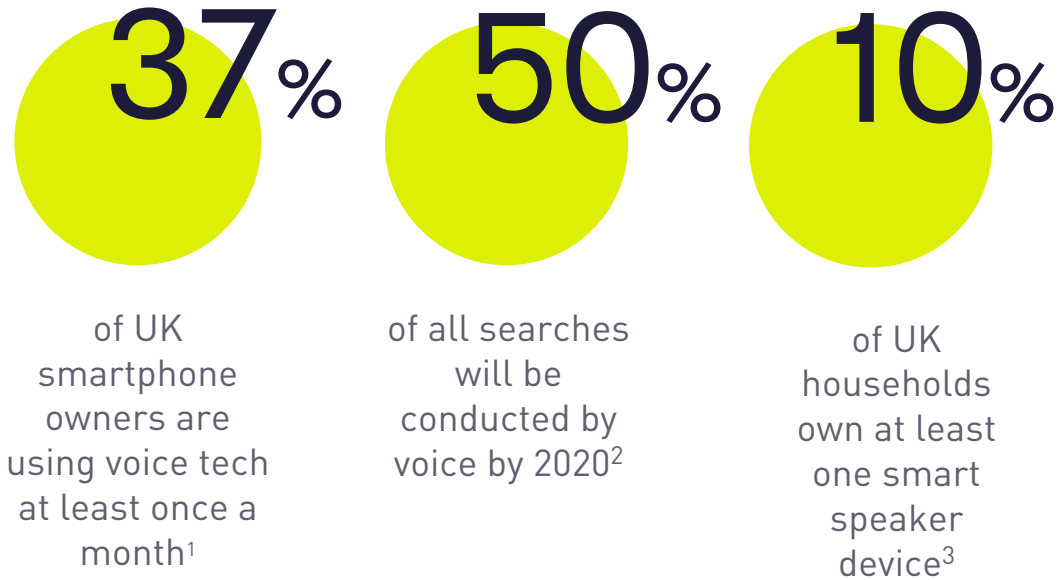
More people are using voice as the technology advances and improves. There is potential for voice to revolutionise how we operate technology

Innovative

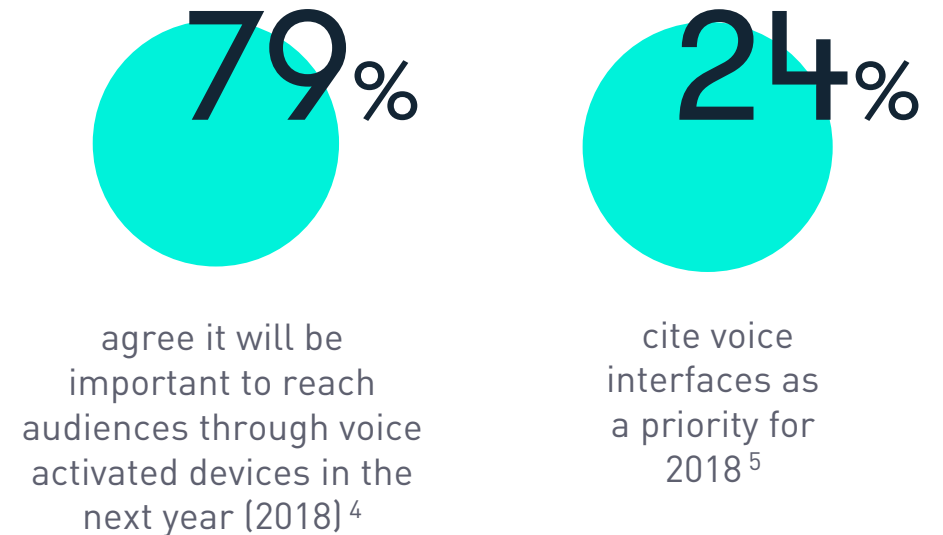
Voice is a new space for brands and people. This can trigger the creation of new types of content, interactions, and designs for both brands and their audience

The age of voice is here...

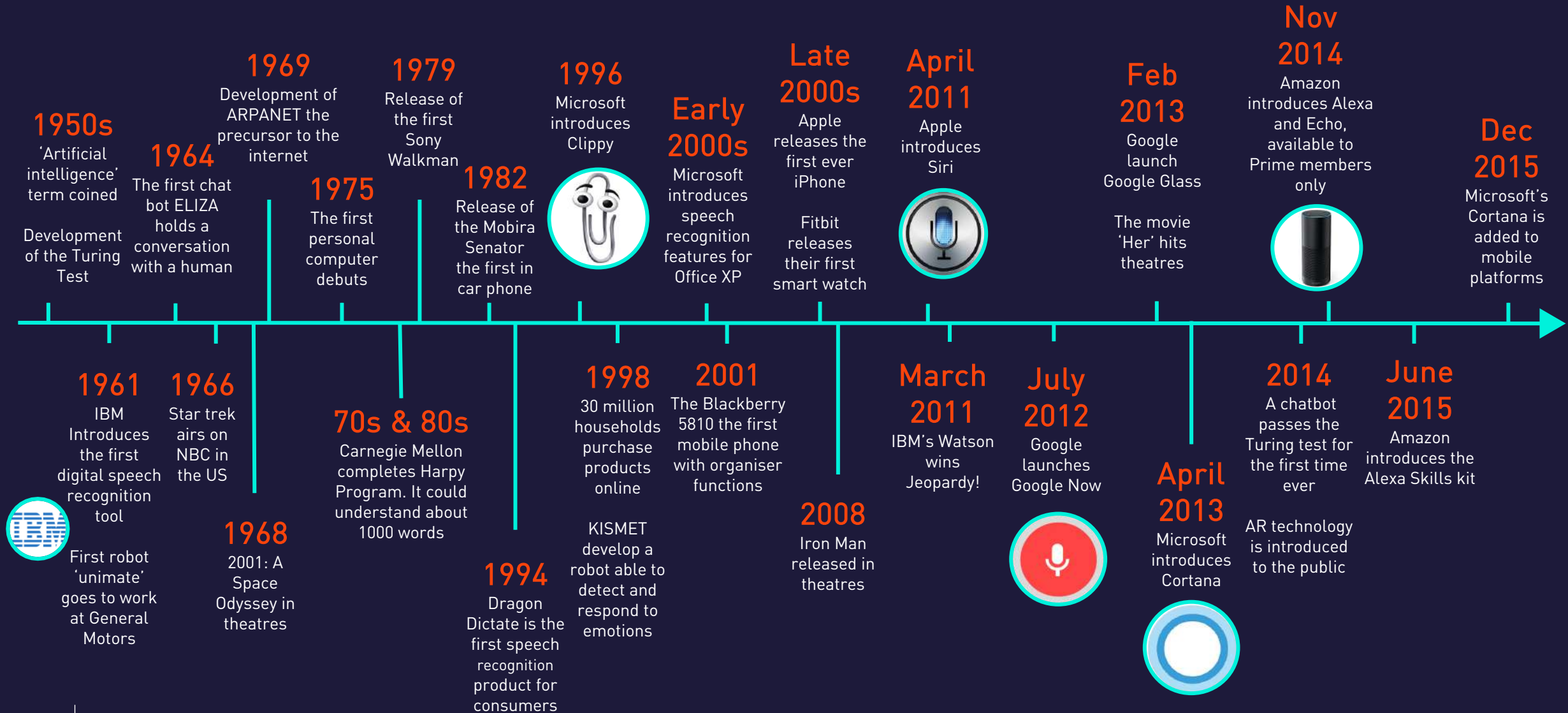
Voice tech is being adopted:



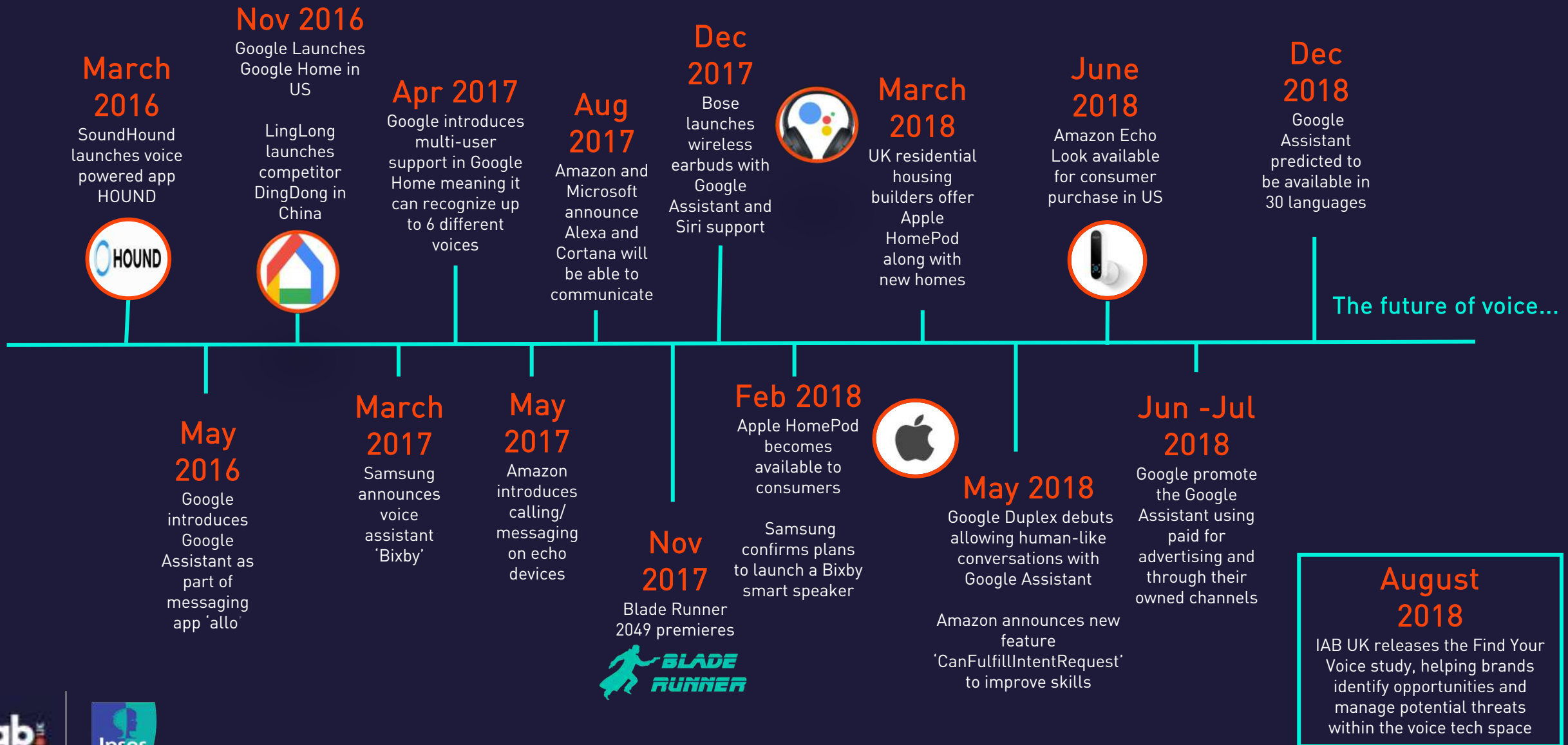
The industry is also excited - Media agency execs and advertisers:



Voice isn't new. It's been developing for a while



In the last few years, we've seen a development spike in Voice



... but the landscape is complicated

Consumers

37% of British smartphone users use voice tech at least once a month¹

60% of consumers said they believe music used in marketing is more memorable than visuals³

Public and private determine the usage of voice

74% of global users think brands should have unique voices and personalities in their apps²

Anthropomorphisation of technology has a big role in voice assistants

Consumers need to build trust into voice services

Voice queries tend to contain more words than those made with text

53% of smartphone users think that voice will help them reduce their screen addiction⁸

Brands can use voice tech by developing voice capabilities within their owned assets, such as their products their packaging or their ads

The primary motivation for using voice is efficiency

Privacy and data protection are a concern

71% of regular voice users feel that speaking to tech now comes naturally⁵

20% of people perform repetitive actions on voice control⁴

Convenience, avoiding typing and simplicity are some of the top drivers for voice

Brands can strengthen consumer relationships by using specific voices

Brands can use voice technology by building experiences that are accessed through voice assistants

Voice interaction provides a great opportunity to convey brand value and project personality

Brands

VOICE

Proactive notification, voice butlers and companions will have a bigger role in our lives



Tech improvements are necessary for voice to become mainstream



Differences between voice control and voice assistant



Better algorithms will drive better tech

Voice will play a relevant role in the internet of things



The current voice landscape is dominated by the tech giants, with Amazon, Google and Apple are market leaders

Technologies



Voice technology requires much less mental energy

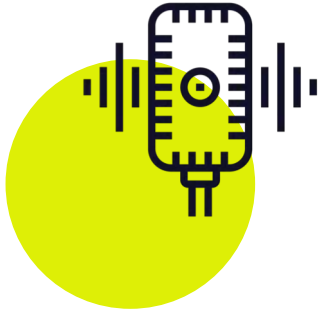


micro moments

Need for content to be optimised for voice



Voice has the potential to disrupt the way people interact with brands



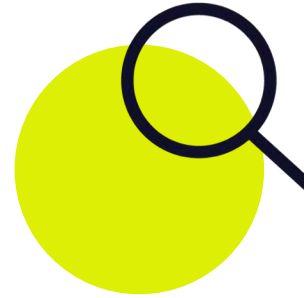
Voice input will be different

People will not say things as they would type them. Conversational questions change the emphasis on keywords.



Brands will rely more on audio at the expense of visual

There will be a different marketing mix, with audio and voice playing a bigger role.



There will be more pressure on winning the search race

With reduced visual displays returning fewer search options, being the number one result will be of the utmost importance.



Designing conversations is tricky

Delivering an engaging voice experience is difficult because it relies on understanding conversational architecture.

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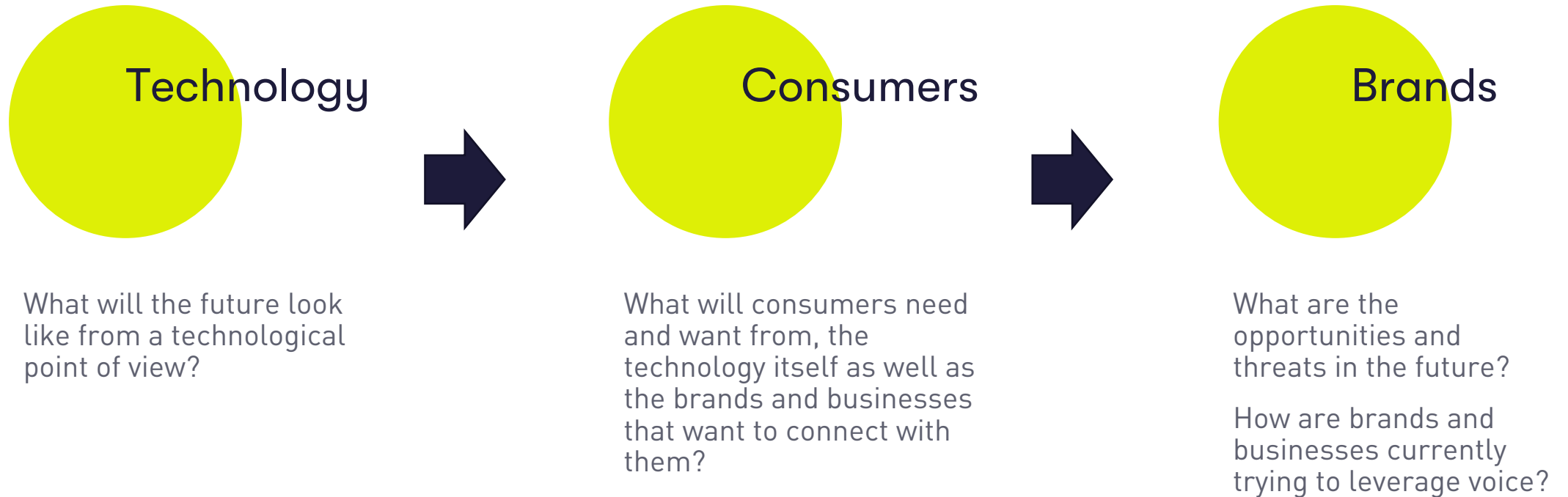
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What we did

Methodology:

- Desk research
- Expert interviews
- Early adopter focus groups
- Semiotics
- Industry Future Casting Session

This study offers guidance to help brands identify opportunities and manage potential threats within the voice tech space



We adopted a multi-stage, consultative approach

1. Desk research

Extensive review and analysis of over 100 existing research reports, press articles and trends to ensure research **uses current knowledge as the starting point.**

2. Expert interviews

10 x expert interviews across a range of disciplines such as neuroscience, AI, and human-computer interaction.

This helped to map out broad perspectives relating to voice and to ground trends and future projections in subject matter expertise.

3. Consumer focus groups

2 x consumer focus groups with early adopters (family vs. non-family) of smart speakers.

Deep dive into their usage, perceptions, and expectations of voice tech. This helped to understand future **needs and desires**, by projecting their **utopian** and **dystopian** futures.

Semiotics

Deep analysis of consumer created material from the focus groups to identify needs, hopes and fears that they would have found difficult to verbally articulate.

... with the final step being a consultation with industry professionals

4. All day industry workshop

A future casting session with industry experts from **media agencies, brands** and **tech companies** to ideate and debate the current voice sector and map out future scenarios, ensuring research recommendations and guidance are grounded in industry insight.



Future Casting Session
24th May 2018

What is voice technology?

- Key terminology
- Voice embedded within AI
- Conversational architecture

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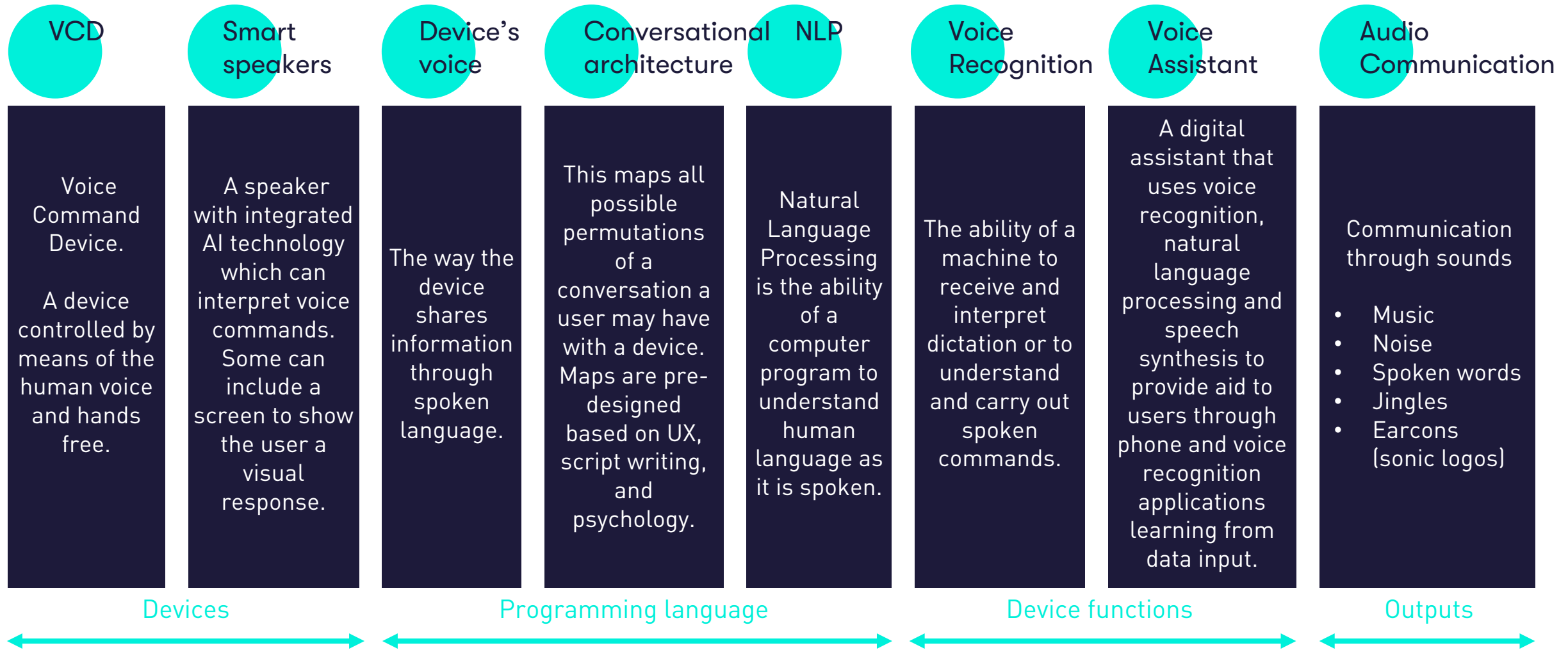
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“Voice” technology is an umbrella term. Let’s break it down to avoid confusion

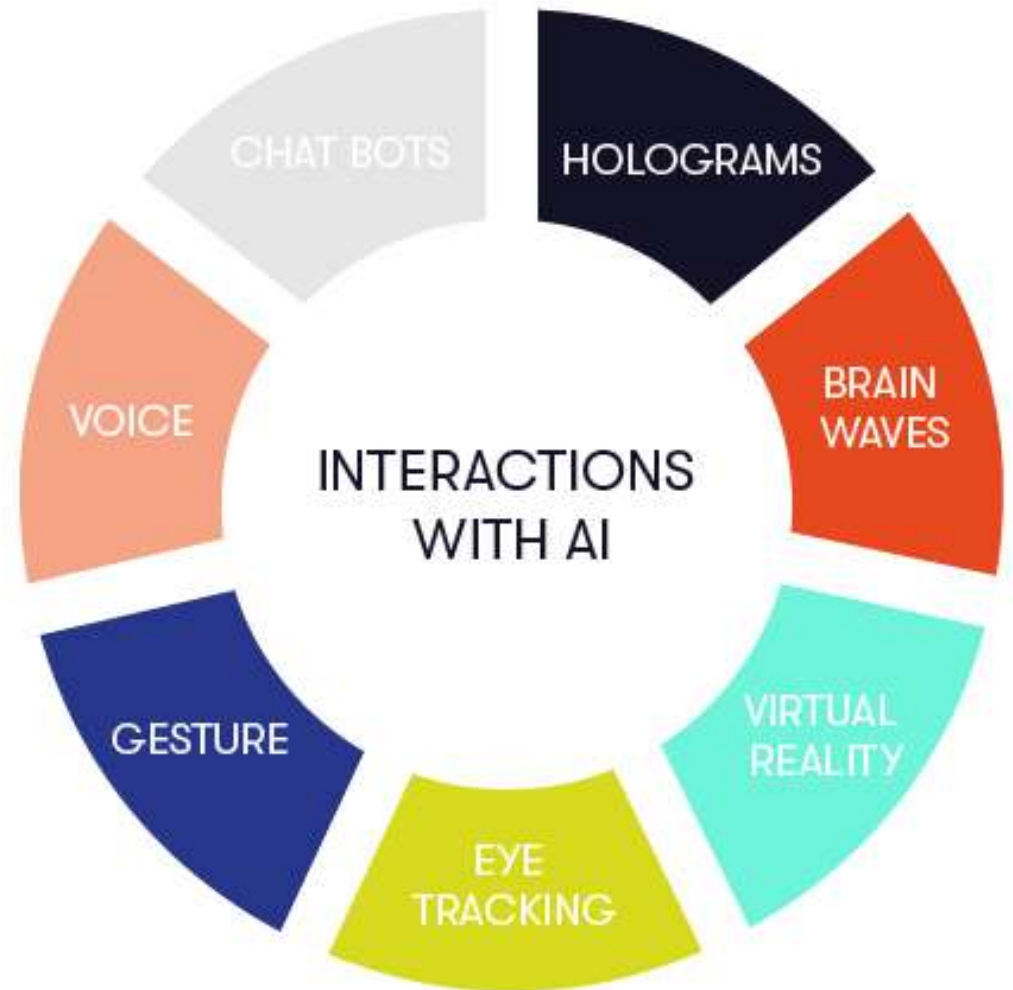


It's best to think about voice as one input or output, often linked with AI

Voice is actually about AI. The AI processes a voice input and delivers an output which is a sound or an imitation of a human voice.

Voice is an input or output; conversations are carried out by **decision trees, and numerous and complex algorithms.**

The 'brains' of voice technology devices are based on a pre-coded **conversational architecture** and in the near future, implementing more complex AI systems.



There are three main types of voice interaction varying in their complexity to implement

Less complicated

More complicated

1. Directive

The **user** makes a request, transmitted by their **voice** in the form of **audio** signals. This **request** is heard by the **hardware** (e.g. the smart speaker or a smartphone) and decoded by **AI**. **AI** finds the answer and sends it to the **hardware** which then decodes the **content** into an **audio** message sent back to the **user**.

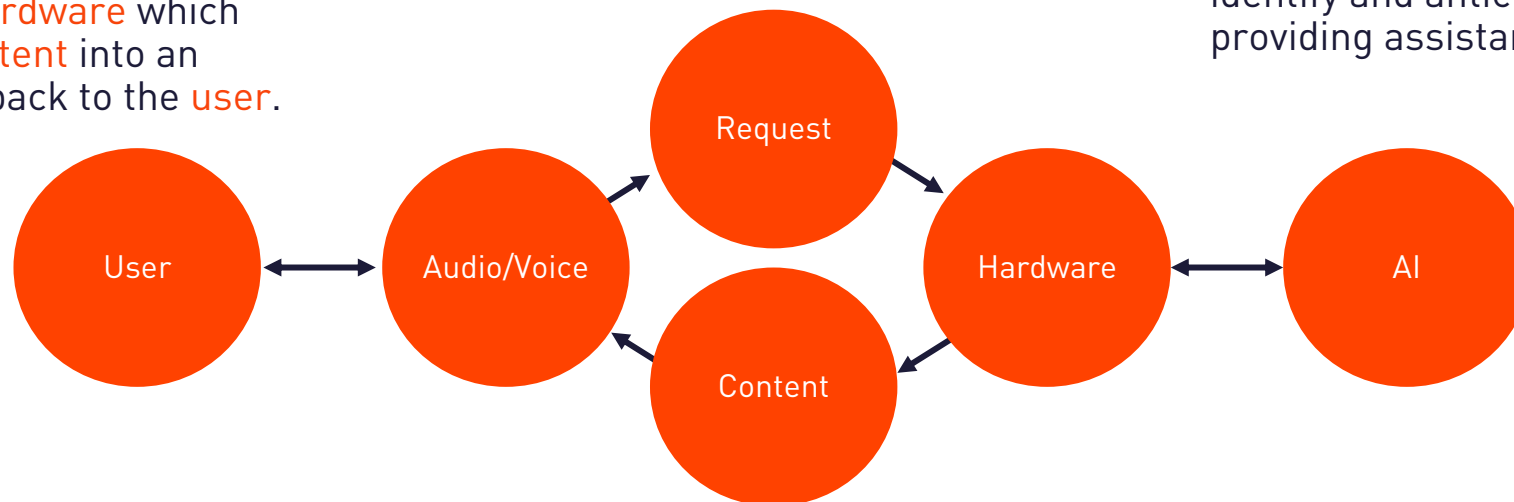
2. Conversational

The process follows the same pattern as in directive interactions, however the flow is more natural, containing an ongoing series of requests and answers.

3. Assistive

In this scenario, **AI** recognises a **user** need and starts a conversation or gives directions/information (**content**) without the need for a **user** request.

The **AI** becomes an assistant able to identify and anticipate **users'** needs, providing assistance through **voice**.



Remember the AI isn't as smart as you think. Humans are still involved

- The conversational architecture that sits behind the voice technology is designed by humans who need to try and foresee all possible developments and versions of a conversation.
- Despite advanced techniques and developer skills, it is currently virtually impossible to foresee all potential branches of a natural conversation.

”

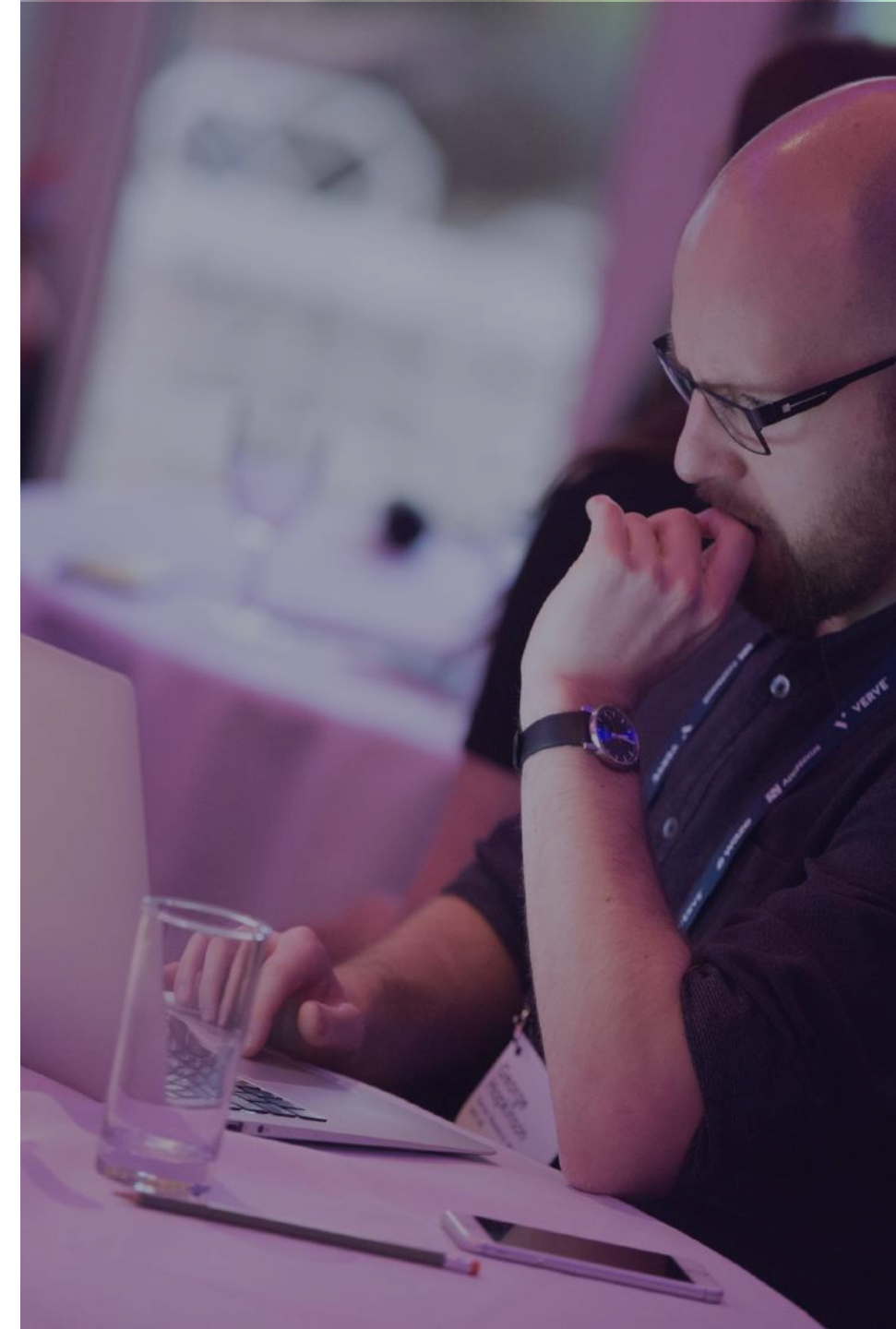
There's some things that AI will never be able to understand and that you will never be able to properly code. It requires an understanding of what it means to be human. For a machine to get that and understand that it needs to be conscious and we are million miles away from having a conscious machine.

Colin Strong, Behavioural Scientist

”

This idea that machines can do what humans do, it's not accurate, they are able to in a mechanical, math form, to mimic a set of behaviours. We use the human language to describe what machines do but they are just following a formula.

Prof Kathleen Richardson, Professor of
Robot & AI Ethics



What are the most important aspects of voice technology?

- What the experts taught us
- What the early adopters said
- What the industry taught us

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The most important aspects of voice, according to our experts



We spoke to experts from different fields in order to map out broad perspectives related to voice



Ben Hammersley
Futuologist



David Hendy
Sound Historian



Dr Sophie Scott
Neuroscientist



Simon Gosling
Futurist



Professor Erik Stolterman
Professor of Human-
Computer Interaction



Tom Hewitson
Conversation Designer



Professor Kathleen Richardson
Professor of Robot & AI Ethics



Kevin Gray
Creative Director



Colin Strong
Behavioural Scientist



Monika Kowalczyk
CEO's Personal Assistant

Experts see voice tech as having great potential for people and for brands



”

A lot of people are starting to realise voice is an opportunity to connect with purchasers.

I definitely think there will be more and more use of voice, I do think it will become a significant channel of communication.

Kevin Gray, Creative Director



”

The nature of interaction with digital assistants will become more humanlike and we will increasingly see them as humanlike, so a brand can find ways to naturally start to integrate into an emerging ecosystem and it will feel quite personal and humanlike.

Colin Strong, Behavioural Scientist



”

Considering the device ecology is key. All these new tech, and especially voice, should be able to talk with each other when put in the same environment. Therefore, devices need to be designed to fit in an ecosystem of other techs.

Prof. Erik Stolterman, Professor of Human-Computer Interaction



”

The Connected Home is going to be the most marketable place, but also our home, a private space that can't be forgotten by marketers, brands, and advertisers.

Simon Gosling, Futurist

However, human communication and assistance is wondrously complicated making it hard to mimic



”

With voice you can communicate unconscious mood, social grade, ethnicity, age and gender as well as your relationship with the person you are speaking to.

With written text you lose a lot of that social information that is communicated in speech.

Dr Sophie Scott, Neuroscientist



”

Sound can carry strong subjective marks and a whole set of different meanings depending on the cultural background of the listener.

David Hendy, Sound Historian



”

A good PA aims to get to know the executive well, understand their goals and priorities, and stay in lockstep with the exec's changing requirements, which enables them to make decisions on the executive's behalf and ensure that the latter's professional and, on occasions, personal life runs smoothly.

Monika Kowalczyk, CEO's Personal Assistant



”

Voice technology is powered by AI. However, when we talk about using AI people imagine we're creating sentient beings like Samantha in the movie Her. Instead, it's really just pattern recognition and good conversation design.

Tom Hewitson, Conversation Designer

Experts also warn that brands need to have ethical and privacy concerns at the forefront



”

I am excited about voice but with caveat.

The things which are most worrying are those we cannot understand, the algorithms. The idea that we obey algorithms that we do not understand has important social consequences. I am not worried about terminator but about people using AI for social security, to make it more efficient, without understanding how the algorithm works.

Ben Hammersley, Futurologist



”

If voice technology is presented as an alternative to a relationship then it becomes a problem. I think the long-term effect will increase human isolation, that is the direction that society is heading in, and this will mean less enjoyment, fewer relationships less intimacy, less political action. I think those are consequences we need to think about carefully.

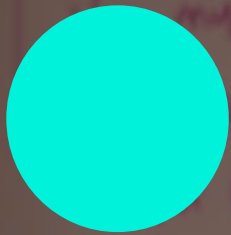
Professor Kathleen Richardson, Professor of Robot & AI Ethics



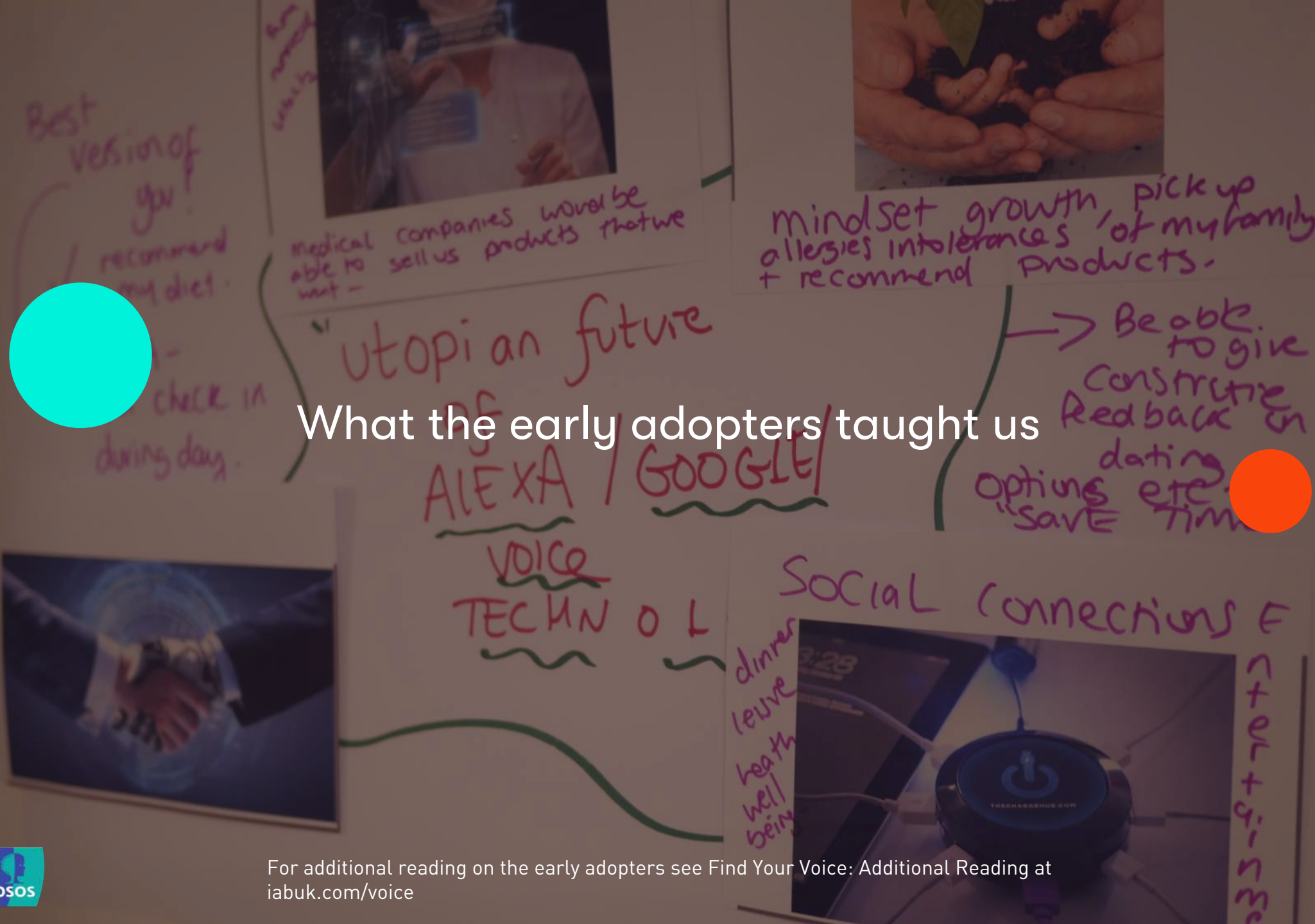
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Technology is shaped in the way we want it to be shaped, just a look at the whole AI debate, it's pretty clear that human values are integrated into algorithms, AI can be racist and sexist and god knows what.

Colin Strong, Behavioural Scientist



What the early adopters taught us



For the early adopters, some challenges in voice are embedded within wider industry trends



AI isn't a totally welcomed technology - the general public is undecided on the benefits and risks of machine learning



To test this, we asked early adopters to create a utopian and dystopian scenario of AI and voice technology in the future. Also considering the role of brands within this.

The outputs of the projective techniques were analysed applying visual and narrative semiotics to uncover the deep hopes, fears and needs people sometimes struggle to articulate when interviewed.

From the focus groups, early adopters' dystopian view is that voice and AI represent a possible risks around **four main areas**

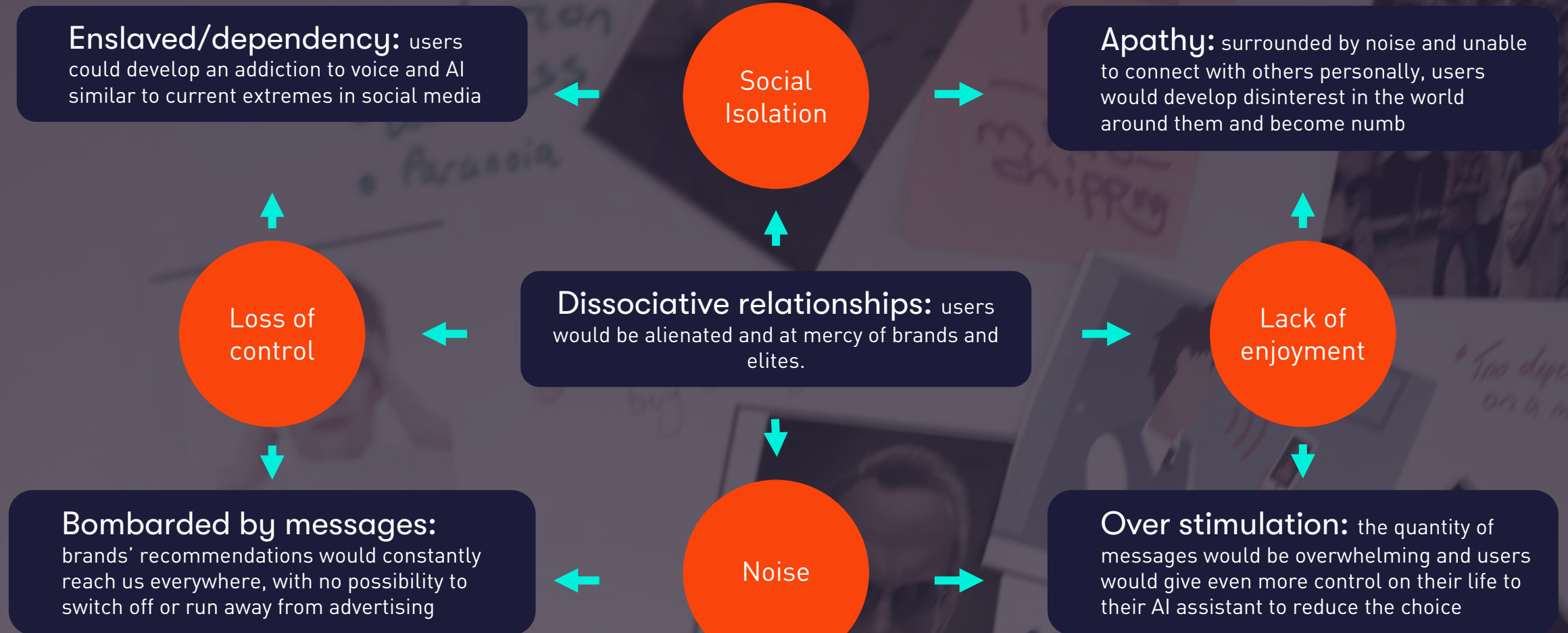
Social
isolation

Loss of
control

Lack of
enjoyment

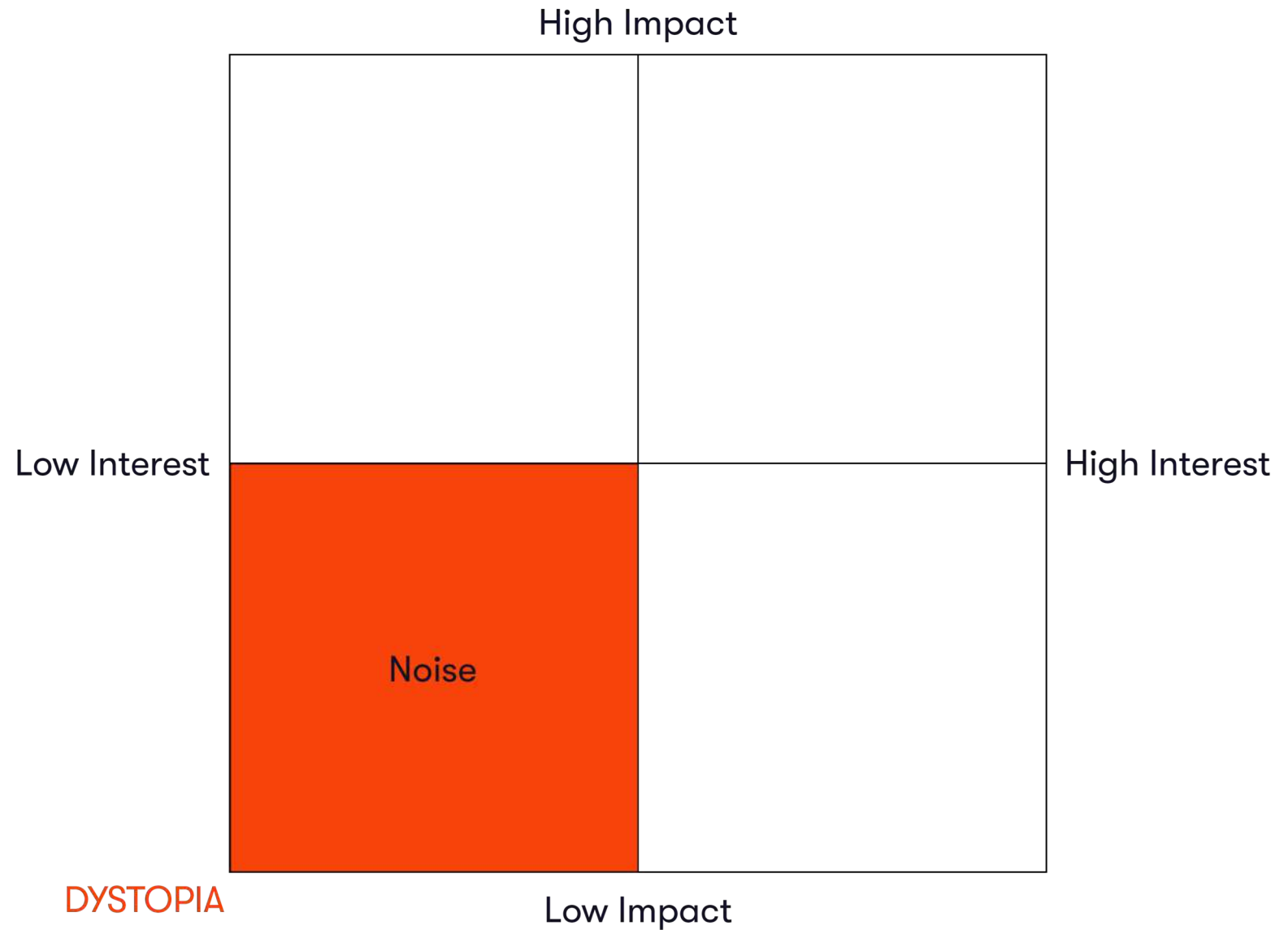
Noise

From the interrelation of these negative areas, emerge five key issues



The dystopian view will be realised if brands only offer low interest and low impact communications

- Noise and overstimulation are at the core of consumers' dystopian futures.
- Messages are overwhelming. Consumers are bombarded with irrelevant information which negatively affects every aspect of their life.



However in a perfect, utopian world, voice and AI relate to people around **four very different areas**

Health & safety

Controlled Internet of Things

Simplified social bonding

Intimate knowledge

From the interrelation of these four positive areas, emerge five key consumer needs

Keep me safe & in control: the perfect voice assistant is checking our health and security 24/7.

Health & safety

Enable the best version of me: it motivates us and enables us to show our best self, preventing or fixing our downsides

Controlled Internet of Things

Create an **organised & useful hyper-connection** with AI and the others

Simplified social bonding

Always be with me: it is everywhere and connected with everything to provide the best service

Intimate knowledge

Support me: it will take decisions for us on repetitive and boring tasks as well as organising complex events

These needs are best met by a **utopian personal butler** type role

The utopia personal butler would work as someone's...

... Family doctor:

intimately knowing someone's physical and emotional needs and looking after them

... Best friend:

having a personality and knowing someone's deepest secrets while maintaining confidentiality

... PA:

enabling people to deal only with what it is relevant and important to them

... Parent:

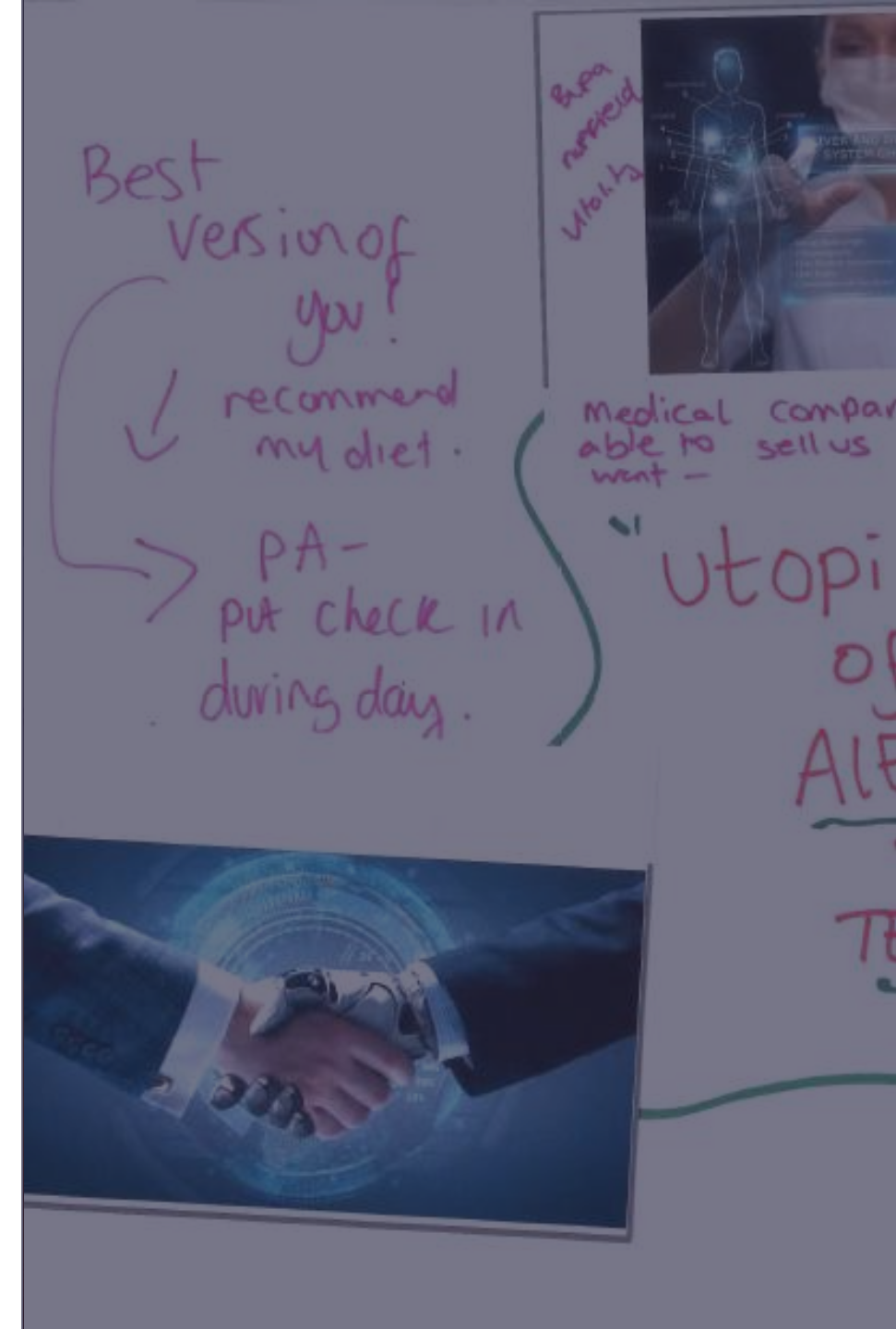
knowing their tastes, needs and behaviours

... Partner/Spouse:

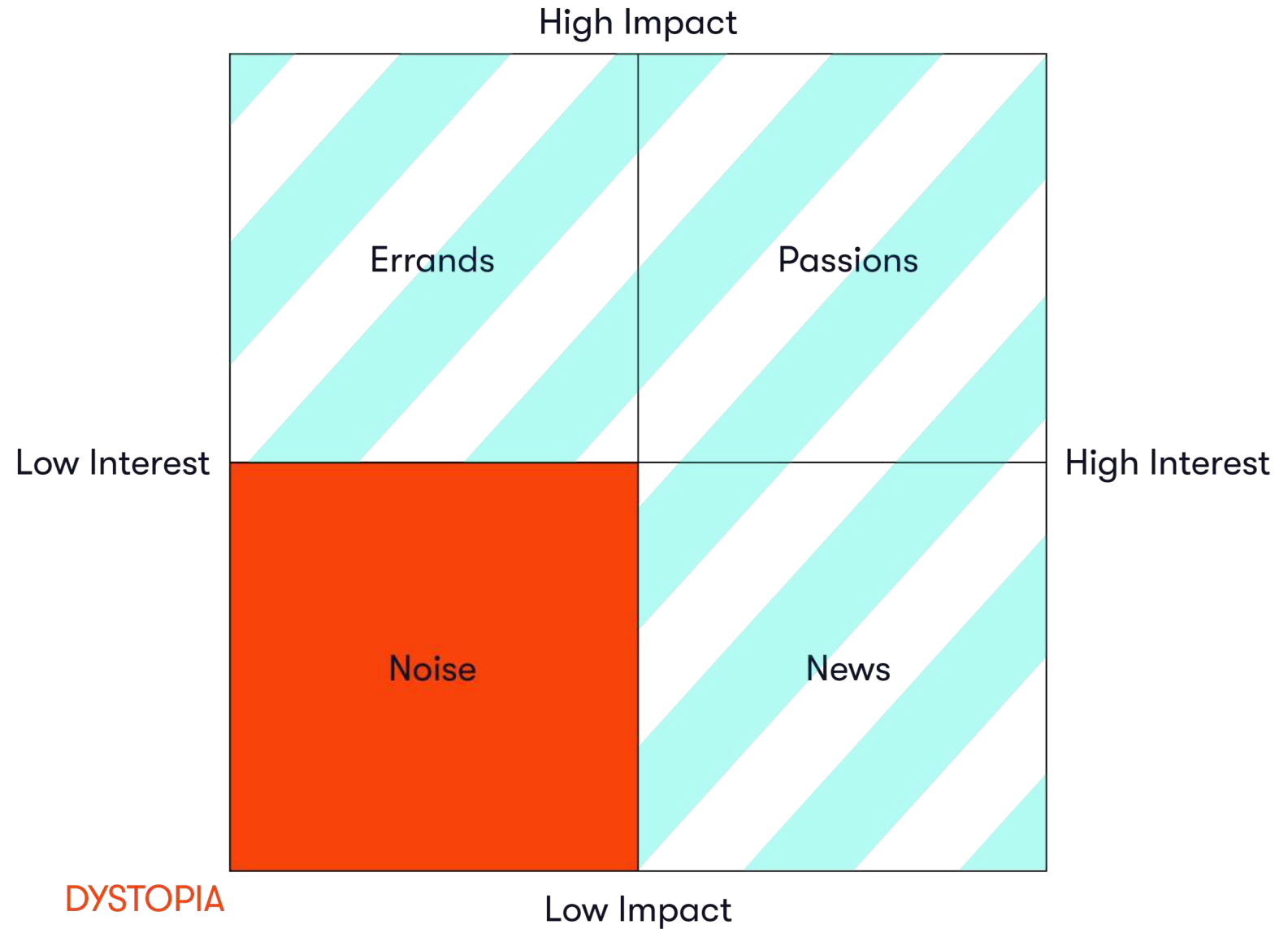
being on their side and teaming up with them to educate and protect their children

... Pet dog:

being loyal and not taking control of nor protesting about its role



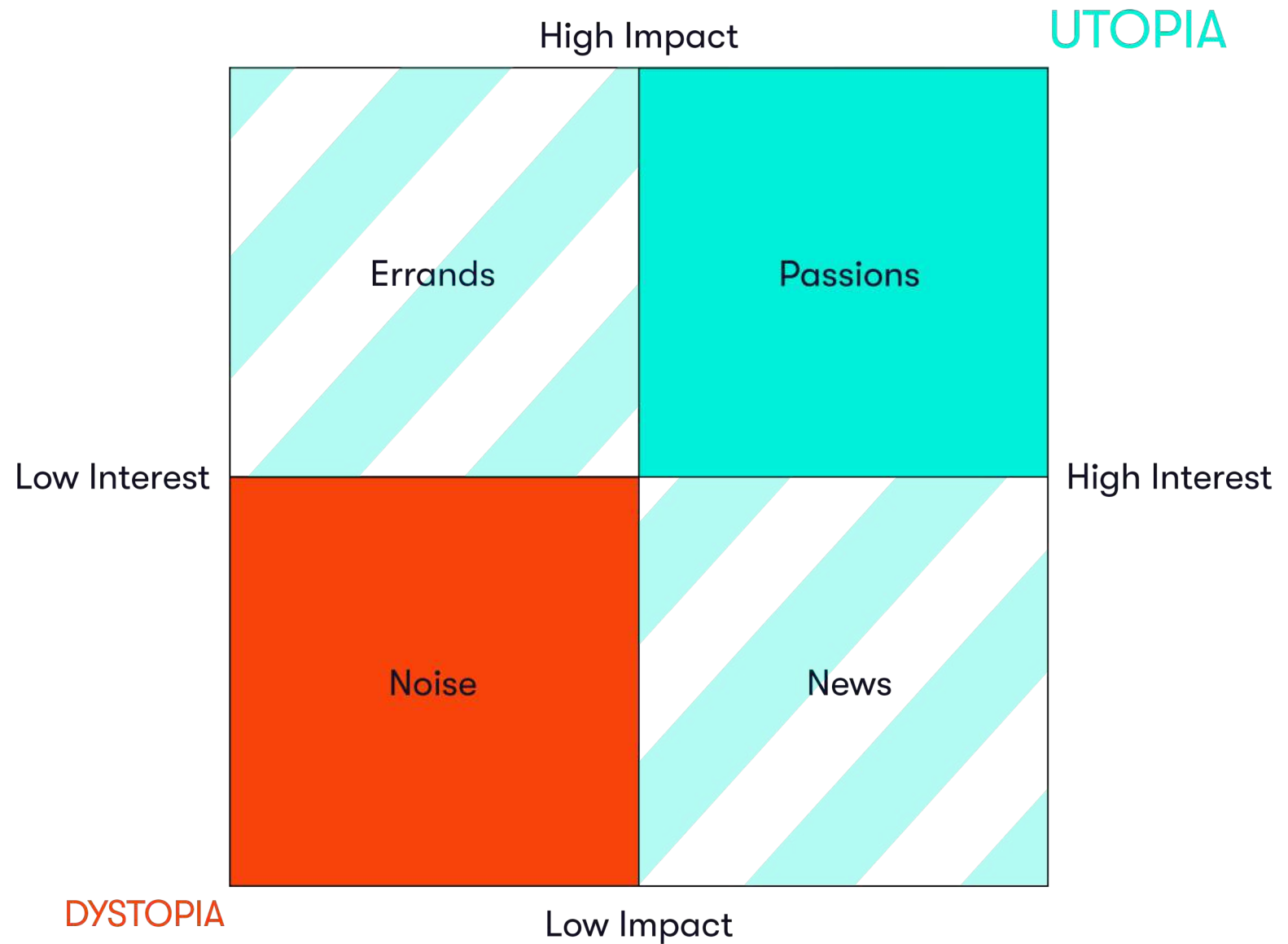
Commercial messages need to be high impact or high interest to avoid appearing as noise

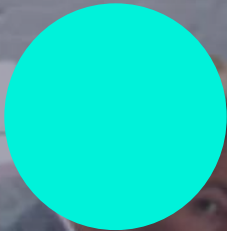


The early adopter utopian view is for commercial messages to be aligned to relevant consumer passions

Relevancy is crucial:

- People are potentially willing to provide assistants with their personal data in order to simplify their life.
- So as long as they receive value in return.
- If the messages are relevant, their quantity is not an issue.





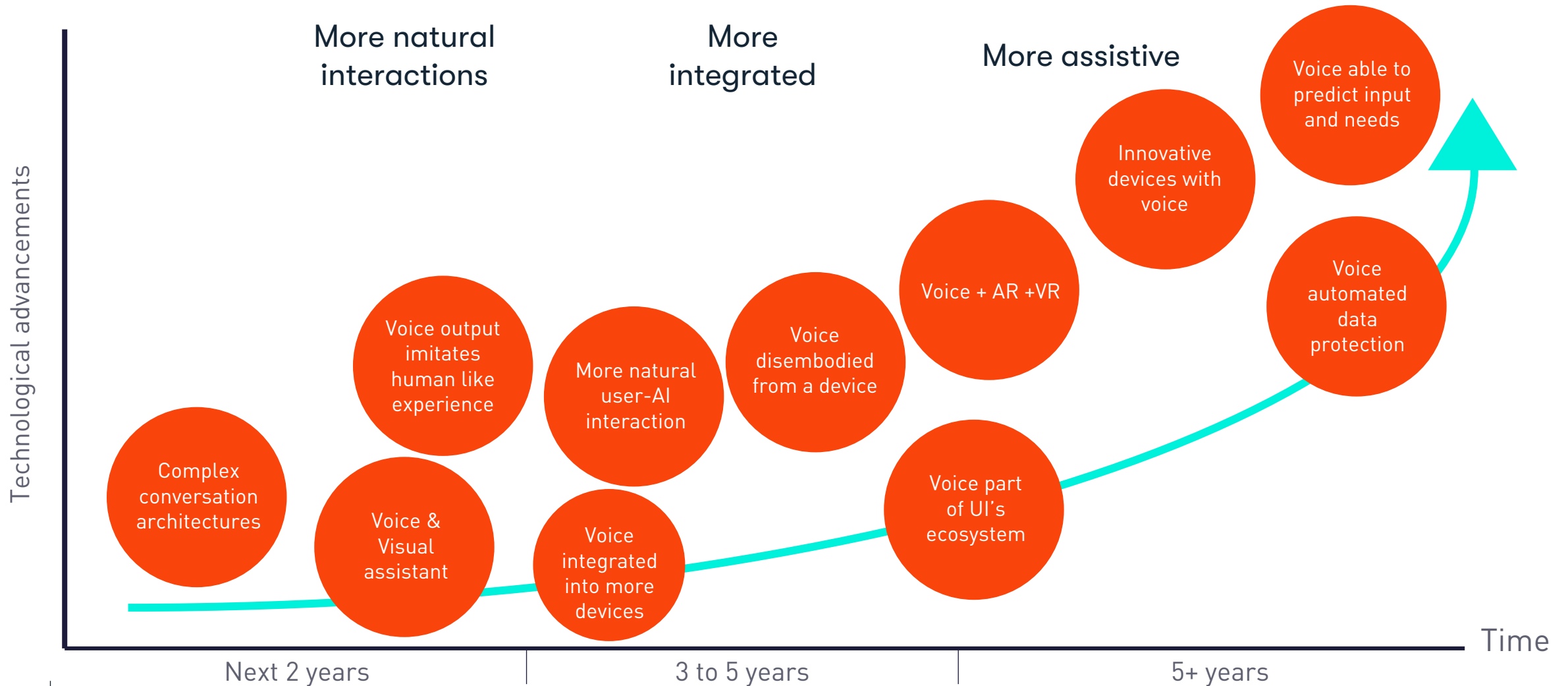
What did the industry professionals teach us at the Future Casting session?



Industry experts from a range of companies came together to debate, ideate and produce guidance for brands in the voice space



Voice technology will become smarter, faster, integrated with more devices and more assistive



Voice technology will offer amazing opportunities for brands, but some might get it wrong at first

1 to 2 years

Voice connected with other devices

smart glasses, smart watches, wearables and a basic extension to IoT

Improvements

in language/understanding and better voice and brand search results

Some advertising mistakes

as consumer experience is finessed and brands work out their best strategies

3 to 5 years

People trust voice

to carry out basic tasks automatically

Brands develop relationships

through voice and voice widely implemented in customer service

Hyper-personalisation

and customisation of messages

5+ years

AI becomes an assistant

with predictive skills to add real value to people's lives

User to brand communication

mainly directed to voice assistants

Consumers and brands

finding a balance that offers a high quality experience for everyone in the voice space

Industry experts see voice technology as being relevant for more than just pure advertising

We asked industry experts to stretch initial ideas for voice tech to their most extreme versions

Initial Idea	Achievable	Innovative	Extreme
Life coaching assistant	Basic chatbot that gives day to day advice not based on any input	Random generated compliments. Decision tree chat bot learns about you over time	Assistive hologram bot. Assistance based on your tone of voice and all the content you have consumed
Decide your fate audio book	An interactive and connected audio book (kids and adult versions) featuring different stories each time you 'read'	Decision tree based, finite endings but based on individual choices	Stories alter depending on the tone of your voice and mood with unlimited endings added through machine learning

We consulted with industry experts to help produce guidance for brands on how to start using voice technology



Advice to brands

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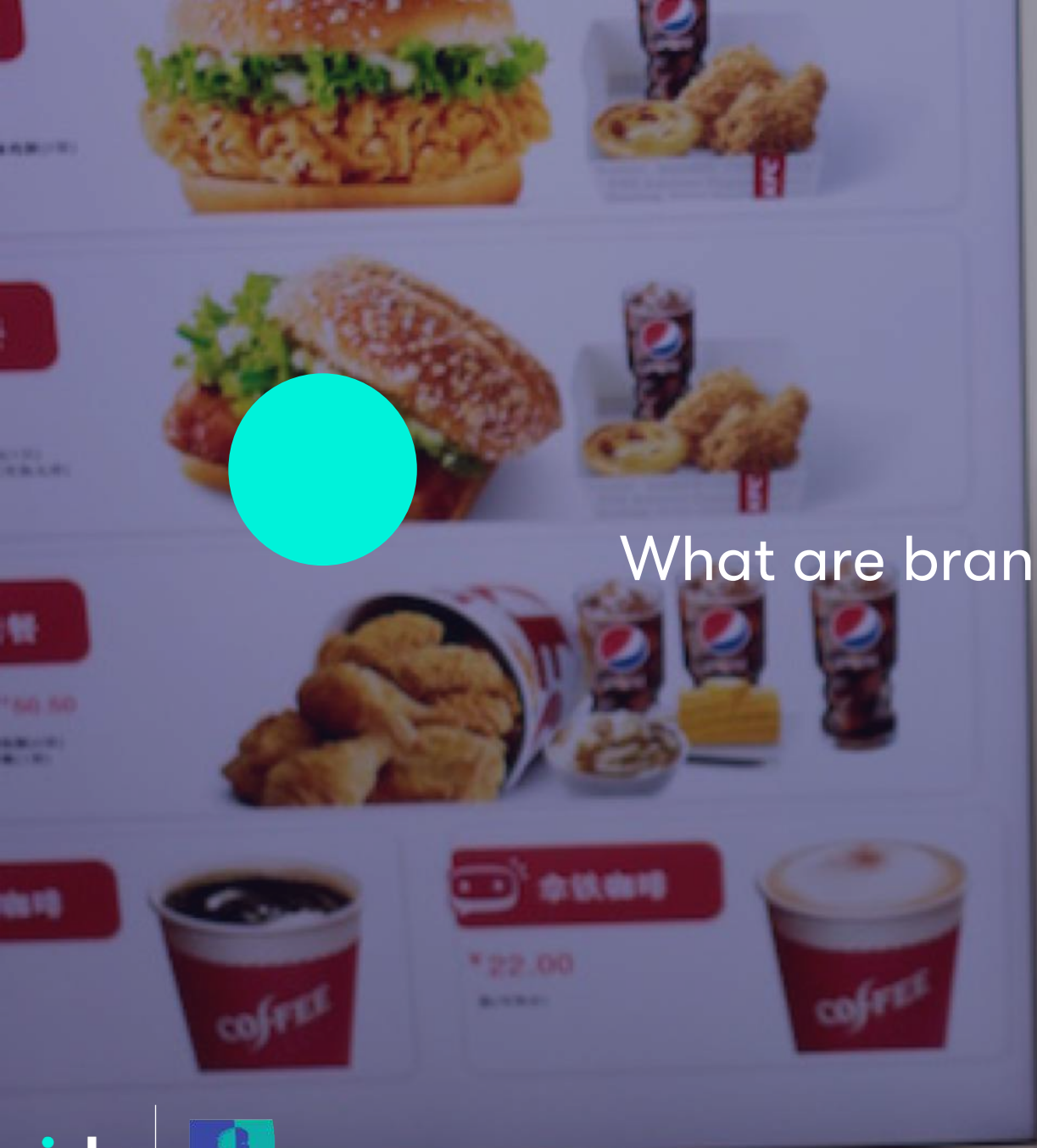
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- What are brands currently doing?
- Understand your audience, listen first
- Consider your brand, your wider strategy and your objectives
- How to implement your plans?



What are brands currently doing?



Brands are already ambitiously experimenting with voice



Vuzix are smart glasses featuring Amazon Alexa integration, meaning that wearers can use them to activate various processes.

www.vuzix.com/products/m100-smart-glasses



Amazon Echo Look, style assistant, uses a camera to suggest new fashion items to purchase.

voicebot.ai/2018/06/06/amazon-echo-look-now-available-to-everyone-will-suggest-new-items-to-purchase/



Burger King's advert triggering Alexa is acknowledged for its creativity but had backlash from users

www.bbc.co.uk/news/technology-39589013



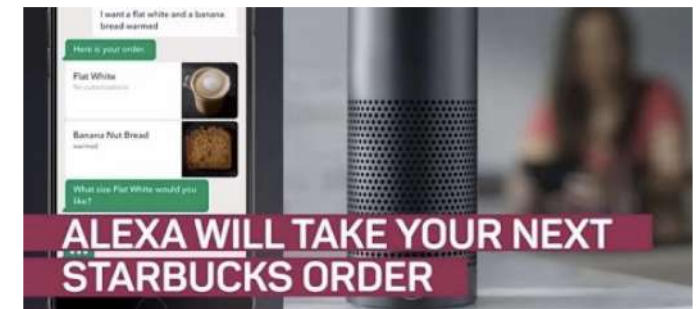
The Kirobo Mini robot detects and responds to people's emotions. It also connects to Toyota cars providing entertainment and directions.

www.toyota-europe.com/world-of-toyota/articles-news-events/introducing-kirobo-mini



Hearst have launched an Alexa Skill called 'O to Go'. Once a day users can hear an inspirational quote from Oprah Winfrey's book

www.campaignlive.co.uk/article/influencer-marketing-creeping-alexa/1430421



My Starbucks Barista is a voice-activated assistant on the My Starbucks mobile app which allows users to place orders.

news.starbucks.com/press-releases/starbucks-debuts-voice-ordering



Understand your audience, listen first

How, when and why are customers talking with you?

The key to making a high quality voice interaction is understanding how, when and why customers are talking with you, as well as how they want to be communicated with.

Consider reviewing your consumers touchpoints and customer conversations.

Things to consider

- Can you use the data you have about customer conversations across social media, face to face, online and phone customer service interactions?
- Can you talk to frontline staff about what they are seeing and hearing about your customers?
- Can you review what you know across your SEO accounts to find out more about the keywords and context in which consumers are interacting with you?
- Can you review troubleshooting queries to better understand key consumers pain points? What common customer questions can you answer easily? What are the FAQs?
- Why are consumers coming to your website? Can you review traffic data. How can you apply this for voice? Can you connect to a need?

Think about the entire consumer journey with your brand. Where can voice add value?

Look at the customer journey, beyond just the path to purchase, to better understand pain points and identify usage occasions for voice technology.

Things to consider

- **Building on existing data:** Consider making the most of the customer data you already own. Identify pleasure and pain points throughout your customer journey and consider utilising the possibility of voice to either maximise or minimise these moments.
- **Meaningful interaction:** Consider where else within the customer journey you could establish a meaningful interaction. Is customer service an opportunity to build your voice services?
- **Availability and access:** Within voice, brands should be readily available and easily accessible throughout parts of the customer journey. Also, brands can usefully think about where the greatest need for voice is – hands free situations, like when someone is driving a car, for instance.
- **Maintain engagement:** Post-purchase communication and reassurance could leverage all the emotional power of voice to establish and consolidate a relationship with consumers.

How can you build trust and be more transparent with people?

Early adopters and experts agree that transparency is fundamental to building consumer trust, especially in a more privacy concerned world.

Many voice integrated devices accompany consumers in personal and private ways, raising concerns over data capture and privacy.

Things to consider

- **Be clear:** consumers are more willing to allow brands to collect and use their data if they are aware of the process and of the value exchange
- **Give full control:** the possibility to control what data to share and to have options to opt out of certain aspects whenever desired would enable consumers to feel reassured. Perhaps this can be linked to the value exchange in terms of giving more and getting more?
- **Listen:** enable consumers to give feedback and ask questions. Customer service can be a great way to reinforce trust in a brand
- **Fail gracefully:** nothing is worse for consumers than feeling betrayed. Acknowledge mistakes and be ready to pay the consequences is more beneficial than being involved in a scandal
- **Use what you already have:** you probably already know how their consumers behave, what they like, don't like and why. This knowledge could be used to develop the right services in voice to serve consumers in straightforward and transparent ways



Consider your brand, your wider strategy and your objectives



Consider and develop your brand's literal voice

When thinking about creating your own voice, brands should start finding inspiration from human voice interactions to create the most suitable ground for a trustworthy and emotional relationship with people.

”



If you approach the talking voice like a painter, the palette of voices is made of age, socio economic and geographic origins but also emotional states, musicality etc. Brands could investigate this to communicate better through Voice.

Dr. Sophie Scott, Neuroscientist

Things to consider

- **Find your voice:** Consider your brand's gender, age, nationality and so on
- **Be familiar:** research shows familiar accents and sounds are more likely to be engaging and trusted
- **Use voice variations:** the human voice changes depending on situation, adding extra meaning to speech. Variation illustrates engagement and understanding of the listeners' situation
- **Check your pitch:** different pitches communicate different statuses and personalities
- **Use a wide vocal range:** voices using a wide vocal range sound more engaging and interesting
- **Consider your sub brands:** do these share the main brand voice or are they different?
- **Consider your brand body too:** robots are part of popular culture and consumers find it hard to disconnect voice from the image of a physical robot or avatar

Remember the utopian personal butler. What role can your brand legitimately fill?

The utopia personal butler would work as someone's...

... Family doctor:

intimately knowing someone's physical and emotional needs and looking after them

... Best friend:

having a personality and knowing someone's deepest secrets while maintaining confidentiality

... PA:

enabling people to deal only with what it is relevant and important to them

... Parent:

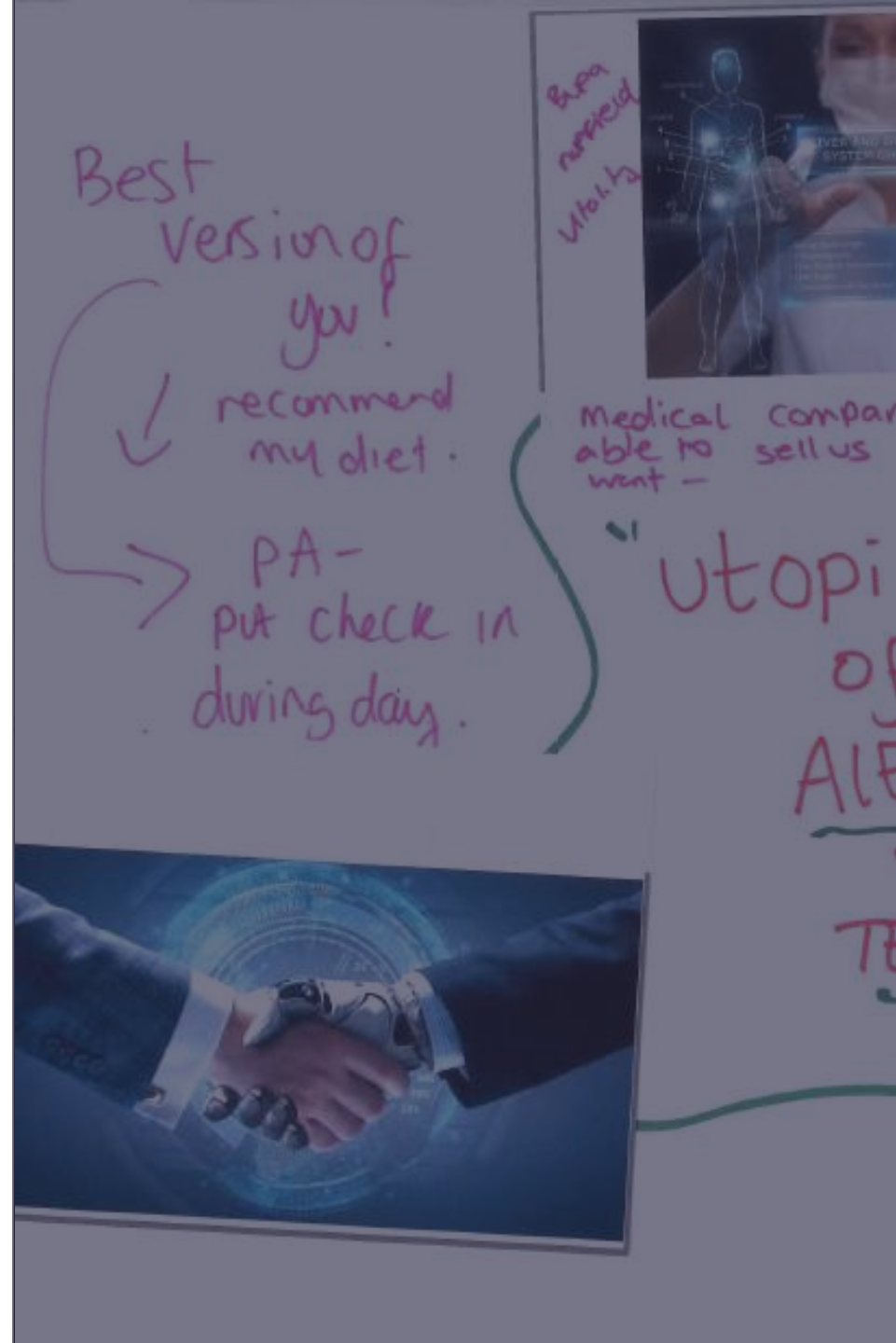
knowing their tastes, needs and behaviours

... Partner/Spouse:

being on their side in teaming up with them to educate and protect their children

... Pet dog:

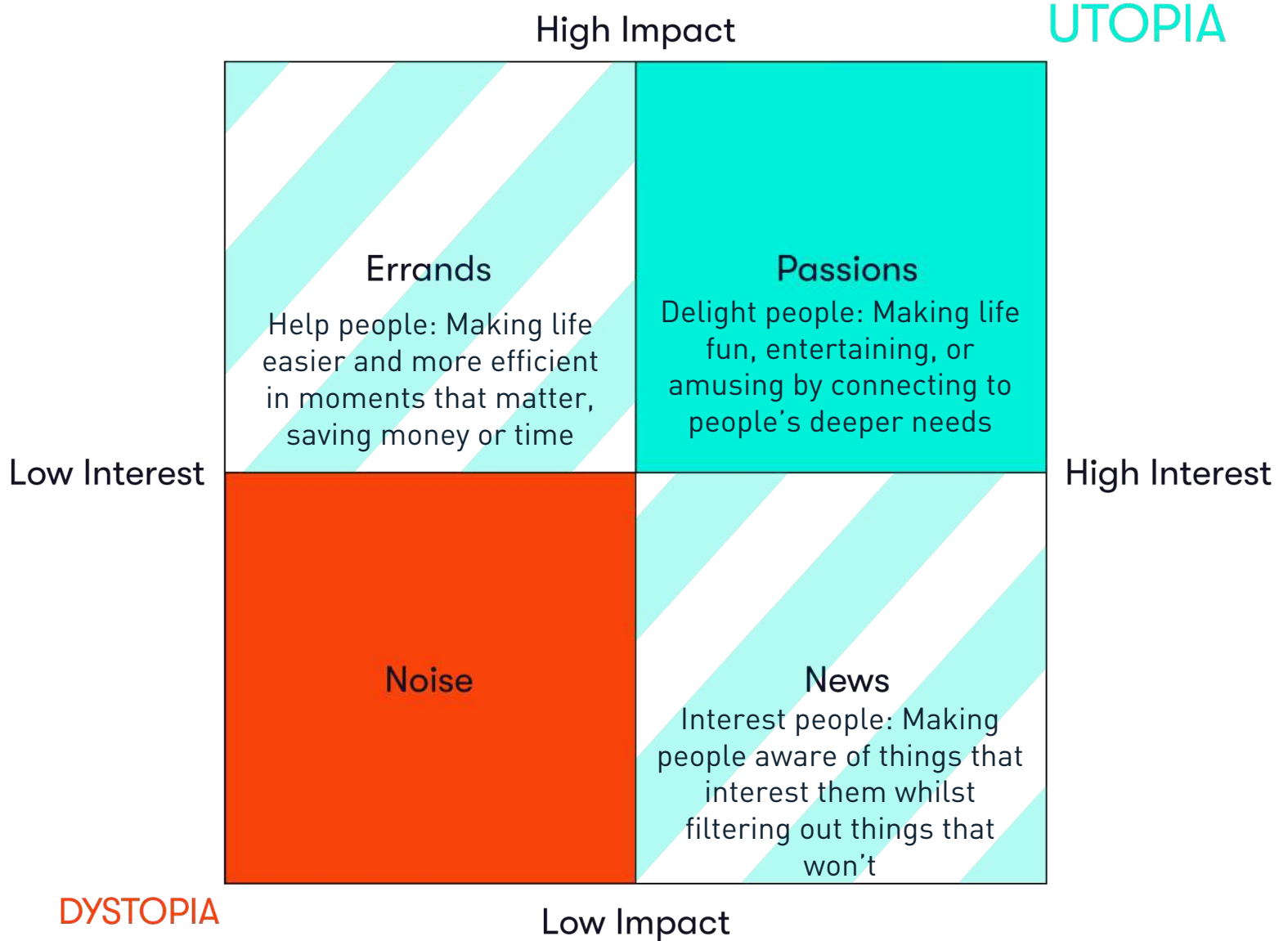
being loyal and not taking control of nor protesting about its role



Add real value to customers' lives

Things to consider

- Commercial messages need to be high impact, high interest or, ideally, both to avoid appearing as noise.
- Are you helping with errands, interesting people with news or delighting their passions? Communicate appropriately.



How does voice relate to your wider strategy?

Voice is one channel among many, it has pros and cons and isn't right for every brand or for every objective. Your voice strategy needs to be connected to an overall strategy to ensure effectiveness

Avoid venturing into voice tech just because it's shiny and new!

Things to consider

- What reason do I have for investing in voice technology?
- What are you trying to achieve with your overall or digital strategy and how can voice be of use?
- Voice is almost always seen in conjunction with screens and other interfaces.
- Consider communicating with voice and other channels with the right mix for your objective
- Different voice activations are required to suit your objective - are you playing more in the brand building or selling space?
- What does success look like and how will you measure it?
- Am I venturing into voice for the sake of it?



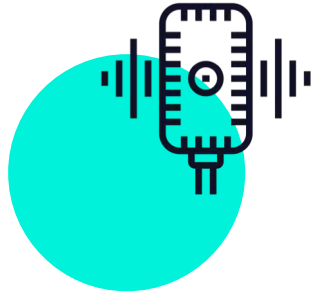
How to implement your plans



Currently voice technology is synonymous with smart speakers, but this isn't the only route to market



Broadly speaking, there are five different areas brands can explore to get into voice



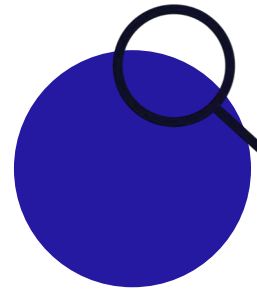
Voice apps

Specific voice assistant applications that exclusively work on one of the voice operating systems e.g. Alexa Skills



Ads

Advertising in its traditional sense. Paid for messages and content targeted at people e.g. digital audio ads



SEO

Optimising your digital presence for voice search e.g. voice search engine optimisation



Products / Digital services

Creating new, or augmenting your existing, products or services with voice tech e.g. website or chatbots

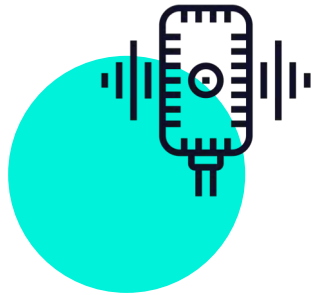


Brand partnerships

Partnering with existing voice tech providers or services e.g. sponsorships of an existing voice tech service

Most approaches will likely rise in importance in the future

Currently important



Voice apps

Future importance uncertain

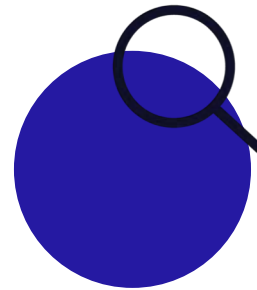
Currently at an early stage



Ads

Future importance only if properly done

Currently important



SEO

Future importance increases

Currently at an initial stage



Products / Digital services

Future importance increases

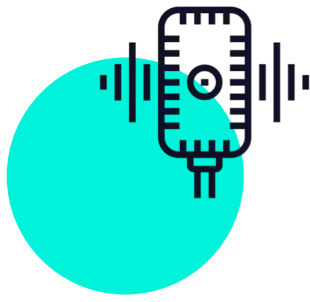
Currently in need of development



Brand partnerships

Future importance increases

A complicated, smart speaker landscape has implications for building voice apps



Voice apps

Voice operating systems have content approval / suspension rules, which means brands have some restrictions. It is worth considering where voice can add value across different devices and platforms

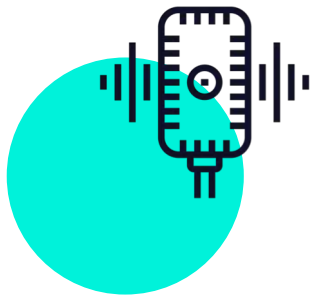
Which ecosystem do I play in?

- Currently separate apps are required for each operating system
- The market is currently dominated by Amazon Echo (69%), Google Home (18%) and Sonos (5%). Apple HomePod just launched and will rise in penetration too.
- Prioritise which ecosystem you develop for by considering which best suits your brand (e.g. retail brands may be best suited to Amazon, unless they are a direct competitor)

Consider the realities of building voice apps

- It's important to consider what you need to do to join a particular operating system. For instance, Skills and Actions may be difficult to design well due to the complexities of coding language
- Consider the three types of user-to-AI interaction (directive, conversational and assistive) and start simple, developing complexity over time

The most successful voice skills and actions are based on simplicity of vocabulary and closing off possible branches of conversation



Voice apps



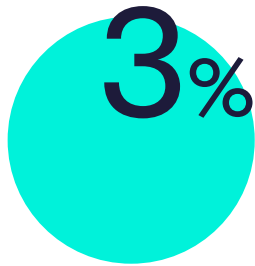
Developing a persona is incredibly important for Actions on Google Assistant, but not so much for Skills on Alexa. The Google Assistant acts like a telephone operator connecting the user to other people, each with their own voice and personality. Alexa, meanwhile has a persona of her own and your Skills are more like her learning new abilities. On Google you can, and have to create a persona that reflects your brand, but with Alexa you need to work with her pre-existing persona for your Skill to feel right.

Tom Hewitson, Conversation Designer

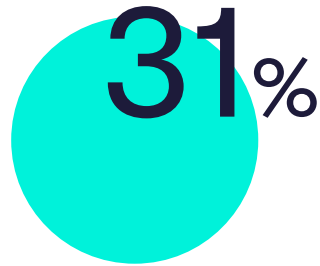
Content, experiences, and services in voice need to be designed considering the user interface and have a deep understanding of human language and the context of the conversation.

How will people find and download your voice app?

- Even though discoverability of voice apps will improve, most Skills and Actions may go undownloaded



The chance that someone will use a third-party Alexa Skill again after installing it¹.



The % of the 7,000+ skills on the Alexa platform that have more than one customer review².



To succeed with advertising in voice, brands should carefully consider their permission to join users by understanding the value exchange



Ads

Currently, the main voice operating systems do not allow pure advertisements; brands could consider ways they can reach consumers now and how this might change in the future.

Now



Optimising existing ads

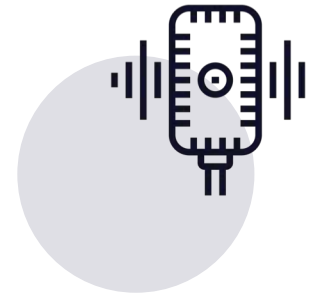
Explore how current forms of advertising can be optimised to make the most of voice technology. E.g. Running a TV ad with a call to action to use your brand's Alexa skill or Running a digital audio advert with a prompt to "add to basket".



Branded content

As smart speakers require an up front cost on hardware, consumers can be resistant to pure advertising. A branded content approach is likely to fair better as the advertisers can set up a new value exchange by producing high quality content for their audience.

Future



Interactive digital audio ads

Audio advertising already exists on smart speakers and phones if they are used to play ad funded music services, podcast read outs or radio. Voice technology may be used in the future by people using these devices to interact with an ad by saying "find out more", for example.



Paid search

In the future, voice delivered paid search results may be an option for advertisers to promote ad funded search results over organic ones.

Can you learn anything from digital audio or branded content advertising?



Ads



Digital audio

- Digital audio advertising has been around for years and podcasting (which contains digital audio advertising) continues to rise in popularity.
- Brands should be careful about rushing into voice blind. Consider re-visiting your current digital audio marketing strategy if you have one to understand what works and what does not.

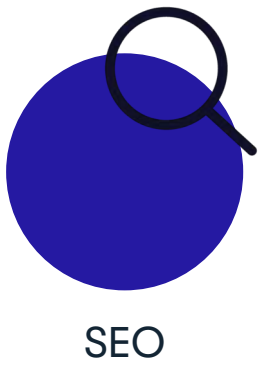


Branded content

- Branded content is common in digital advertising. Voice technology can be used to enhance, or create new, content experiences.
- Ask yourself, what experience does your business have of content marketing? Studying the lessons learnt here and how they might carry over to voice is a good place to start.

The IAB's Guide to Creative Best Practice for digital advertising may also be a useful resource
<https://www.iabuk.com/creativebestpractice>

What is your SEO strategy and how can you use this in the voice space?



Currently people are using voice tech as a search engine with results often being delivered by voice

Place your brand at the right time, right place, right moment

- Most voice enabled devices are affiliated with a search engine, which drives search results e.g. Alexa uses Bing
- SEO strategy and optimising web presence is crucial for being recommended in the voice space
- Consider the importance of brand salience and making your brand synonymous with your product
- There are important differences between brands that are closer to being bought via voice compared to brands being searched for more information (e.g. inventory and location importance vs. providing general information)

Ensure you understand

- Text vs. voice search differences and how to exploit the nuances of voice
- Local vs. national distinctions and needs
- The importance of user ratings and recommendations
- Algorithms and the reasons for winning or losing search engine recommendations and rankings races

Voice is, and will be integrated into more products and services. How can your brand get involved?



Products /
Digital services



Products

Can voice be integrated into your brands existing products to add value to people's lives?

- Consider how consumers are currently using your products. Quick wins are possible by identifying pain points or obvious needs.
- Tech companies like Houndify offers the possibility to add conversational capabilities to any smart device



Digital services

Can voice be integrated into existing digital services like apps, websites or chatbots?

- Given apps and websites likely have greater penetration for most brands than playing the smart speaker space, brands should consider if they can leverage their existing digital services by adding a voice component to serve consumers
- For instance, a brand may enhance a chatbot with voice technology so people can interact with it using speech

Brands need to be sure that their voice solutions are genuinely more convenient or adding value otherwise people will have little incentive to switch from the status quo

Smart brand partnerships are likely to be a useful route into voice as consumers warm to voice-based purchasing



Brand partnerships



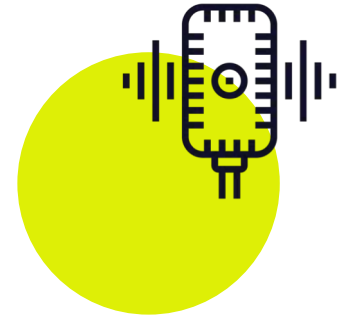
Brand Partnerships

- Avoid the investment of creating new voice tech for your brand by partnering with another
- Consider smart partnerships with complementary brands (e.g. smart ovens and baking brands)
- Brands in the retail space can partner with voice tech brands to drive sales through voice assistants. E.g. Google has issued a voice activated coupon for orders at Target in the US



Influencer Partnerships

- Consider partnering with influencers to use their voice for your brand
- Influencers are likely to play a role in the voice landscape in categories like alcohol, food, fashion and beauty as brands currently thrive on third party endorsements.



Sponsorships of voice apps

- Brands should think about ways to partner with owners of popular skills in their categories (e.g. a chef skill partnering with a retailer), yet beware of the rules of various voice ecosystems.

Each approach varies in complexity and potential value

Brands need to think and plan carefully to work out what is going to work best for them.

Consider starting with low complexity ideas and progressing from there.

Value	High	<ul style="list-style-type: none">- SEO- Retail partnerships- Influencer partnerships- Branded content advertising	Digital services	Digital products
	Medium	Digital audio ads	Sponsorship of voice apps	Voice apps
	Low			
		Low	Medium	High

Complexity



Summary



Five important take-aways to help find your voice

1. The age of voice is here. It is a wondrously complicated space intrinsically linked to AI
2. The risks and rewards for brand are high. Consider the utopian personal butler. Which role can your brand can fill?
3. Listening to your audience is crucial. People are willing to hand over data to get the most personal service
4. Consider your brand's literal voice and non visual identity
5. There are many ways to use voice technology. Choose the right route for your brand

References



References for statistics cited

1. 37% of UK smartphone owners are using voice tech at least once a month - Speak Easy, Mindshare and J. Walter Thompson, 2017,
2. 50% of all searches will be voice searches by 2020 - comScore, 2017
3. 10% of UK households own at least one smart speaker device,- YouGov, April 2018,
4. 79% agree it will be important to reach audiences through voice activated devices in the next year - DAX, March 2018,
5. 24% of cite voice interfaces as priority for 2018 - Toolkit 2018: Why voice is branding's new frontier, WARC, December 2017,
6. 74% of global users think brands should have unique voices and personality in their apps; 71% of regular voice users feel that speaking to tech now comes naturally – Speak Easy, Mindshare and J. Walter Thompson, 2017,
7. 60% of consumers said they believe music used in marketing is more memorable than visuals- PHMG, 2017,
8. 20% of all mobile Google searches are done using voice- Google, 2016,
9. 1 billion voice searches made every month, Alpine AI, January 2018,
10. 30% of web browsing sessions will be done without a screen by 2020 - Gartner, October ,2016 ,
11. Public Views of Machine Learning, Ipsos MORI, April 2017,
12. 'There are more than 7,000 skills on the Alexa platform but only 31% of these have more than one customer review, suggesting the majority of applications aren't being downloaded', Speak Easy, Mindshare and J.Walter Thompson, 2017,
13. 'There's only a 3% chance that someone will use a third-party Alexa Skill again after installing it.' - Alpine, 2017,

Recommended reading

- Major report on voice. Speak Easy, Mindshare and J. Walter Thompson, 2017,
- Best website for up to date news on voice.
- Quick read. WARC Toolkit 2018: Why voice is branding's new frontier, 2017,
- Actionable read. How to develop a voice strategy for your brand, WARC, 2017,
- A primer on voice. The 2017 Voice Report,
- Voice facts and stats compendium.

Appendix

Some additional insights from industry experts



Industry experts: Voice technology will offer amazing opportunities for brands, but some might get it wrong at first

	1-2 years	3-5 years	5+ years
 Voice & AI Technology	<p>Voice connected with other devices – smart glasses, smart watches and wearables</p> <p>Integrated voice and screen technology</p> <p>Q&A automated conversations</p>	<p>AI translation of body language into verbal language</p> <p>Voice merges with AR</p> <p>Voice widely implemented in customer service</p>	<p>AI becomes an assistant with predictive skills.</p> <p>AI to AI auto replenishment and task management.</p> <p>NLP close to human standards</p>
 Voice Technology & Consumers	<p>Superficial relationship between user and device</p> <p>Implementation on social networks and messaging apps</p> <p>Basic extension to IoT</p>	<p>People trust voice to carry on basic repetitive tasks automatically</p> <p>Huge penetration in home 80% of homes</p> <p>Full integration in the ecosystem</p>	<p>End of typing and writing with people talking freely using voice in home and public</p> <p>Personal relationships with voice – i.e. mental health support - & robot care</p> <p>Brands connected to AI connected to users through bio-technologies</p>
 Voice Technology & Brands	<p>Media content mediated by Google/Amazon = a lack of plurality</p> <p>Improvements in language/understanding and better search results</p> <p>Some advertising mistakes</p>	<p>Brands develop relationship through voice</p> <p>Hyper-personalisation and customisations</p> <p>Voice life coaching</p>	<p>Voice only retail experience</p> <p>Consumers and brands finding balance in the voice space</p> <p>Brands communication mainly directed to Voice assistants</p>

Industry experts see voice technology as being relevant for more than just pure advertising. We asked industry experts to stretch initial ideas for voice tech to their most extreme versions

Initial Idea	Achievable	Innovative	Extreme
Baby care: day to day advice in response to parent questions	Decision tree that learns routine and adapts to baby responses and parenting style	Alexa recognises the tone of a crying baby alerts parents / uses appropriate parental voice	Live in robot that will parent
Seasonal voices	Personalised voices like a character from <i>The Simpsons</i>	Real voice sampling and generation. Alexa can be anyone	Voice and personality transplant – have dead family members in the cloud virtually
Radio AI : radio made me attractive by voice	Personalisation of ads and music style	Full real time like/dislikes, news, mood/activity detection. Ad personalisation	Personalised broadcasting based on tone of voice of listener.
Make voice attractive to kids and permissible by parents	Games, news and stories influenced by topics at school	Gamify expression of what has been learnt and how it affects their life	Content driven by education/ home work.
Decide your fate audio book	An interactive and connected audio book (kids and adult versions) featuring different stories each time you 'read'	Decision tree based, finite endings but based on individual choices	Stories alter depending on the tone of your voice and mood with unlimited endings added through machine learning
Life coaching assistant	Basic chatbot that gives day to day advice not based on any input	Random generated compliments. Decision tree chat bot learns about you over time	Assistive hologram bot. Assistance based on your tone of voice and all the content you have consumed
Maximise visibility across all search engines and platforms	Personalisation: tone of voice and language	Eaves dropping: conversation trigger	Mind reading: think of a need it searches automatically given results in writing
A world of advertising where we only see things that are relevant	Hyper-personalised, programmatic ads filter out non relevant	Suggestions and recommendations based on preferences with deep learning.	Buy space within your mind chip market allowance for ads. Direct to mind classifieds.

Industry experts envisioned how brands could be playing in voice in the future. This gives brands a clue about some of the possibilities

Netflix Social

Adding a social aspect to an online streaming service, using speakers to tell people what their friends are watching and recommending

M&S Bespoke Shopper

Creating a voice assistant to advise customers, creating a bespoke service to sell clothing from the brand to consumers

Gillette Hologram

A hologram assistant that gives personalised advice to consumers based on facial mapping technology

Making Voting Easier

through allowing voters to have personalised conversations with their MP

Dominos Automatic Delivery

Call system able to recognise customers voice and order their usual and can tailor suggestions based on tone of voice

Tailored Nike Shoes

Personalised shoes that are made using AI and consumer suggestions accessed and built using a voice activated vending machine