THE FUTURE IS VOICE ACTIVATED
ARE YOU READY?

#VoiceActivated
So what does this mean for Voice Search?

**Does Amara’s law apply?**
All the signs are telling us that it does.

On 28th June 2017, we surveyed 1,181 adults in the UK regarding current search behaviours, and found that 15% use voice to interact with a device – via a smartphone, a games console, laptop, or digital assistant.

That 15% translates to almost 7.4m people in the UK. A lot of people, but it’s not a game changing number yet, and those 15% are not using voice activation exclusively for search.

‘Amara’s Law’ has been proven right by almost every single new technology in the last 10 years:

We all overestimated the short term effect, and underestimated the long term effect, of digital.

We all overestimated the short term effect, and underestimated the long term effect, of social.

… and we all overestimated the short term effect, and still underestimate the long term effect of mobile.

Jack Swayne CSEO, iProspect UK & I.

**The future will be voice activated, of that there is no doubt. All data and trends are pointing to a world that is driven by our voice, rather than by our hands and fingers.**

However, when the industry gets excited by new technology we can sometimes let that excitement cloud our judgement on its true impact on consumer behaviour. This can be dangerous when making decisions about how to drive better business performance through marketing.

In the last 18 months, if you only listened to the buzz, any brand that didn’t invest large proportions of its budget in Augmented Reality, Blockchain, or Voice Search, would be dead in the water.

But in the last 18 months, have those new technologies really had a disproportionate effect on business performance? Have the brands that have done nothing to address these new phenomena truly been left behind?

We believe the answer to this question to be no… in the short term. Although that doesn’t mean there are no opportunities today. As Roy Amara sums this up in his increasingly popular law:

“We tend to overestimate the effect of a technology in the short run and underestimate the effect in the long run.”

Amara’s Law has been proven right by almost every single new technology in the last 10 years:

We all overestimated the short term effect, and underestimated the long term effect, of digital.

We all overestimated the short term effect, and underestimated the long term effect, of social.

… and we all overestimated the short term effect, and still underestimate the long term effect of mobile.

**We tend to overestimate the effect of a technology in the short run and underestimate the effect in the long run.**

Voice search is no fad.  In the long run, it will continue to grow in importance.

Voice search is no fad. In the long run, it will continue to grow in importance.

*Source: ComScore.*
For brands, adapting to voice search means engaging with the differences between the way people speak, and the way they type. When searching verbally, we tend to use more natural, conversational language to ask questions. Simply put, we use sentences rather than one or two words.

With the growth of voice search, there is an increase in questions as part of the search phrasing. The use of search queries starting with "who," "what," "where" and "how" has increased by 6% in the UK since 2015.

1. **Don’t miss the longtail conversation**

It’s much easier to confidently ask your mobile phone a question if you know you’re going to get a sensible answer. Advances in speech recognition, natural language processing (NLP) and the AI that powers the likes of Siri and Cortana means we now engage with devices verbally with more confidence and can get accurate and useful responses. In the past, users may have been left frustrated with a poor voice experience. Today however, the average speech recognition error rate is down to around 8%. This error rate is likely to continue to decrease, but it’s still only half the story. For users to be satisfied, their queries need clear, accurate answers and there is still room for improvement here. Recent research found Cortana and Google Home far more adept at providing correct answers (46% and 62% respectively) than Siri or Alexa (13% and 18%).

This growing confidence in voice recognition, along with the speed and ease of speaking rather than typing means we’re seeing searches become longer and more conversational.

For brands, adapting to voice search means engaging with the differences between the way people speak, and the way they type. When searching verbally, we tend to use more natural, conversational language to ask questions. Simply put, we use sentences rather than one or two words. With the growth of voice search, there is an increase in questions as part of the search phrasing. The use of search queries starting with "who," "what," "where" and "how" has increased by 6% in the UK since 2015.1

1. **Don’t miss the longtail opportunity**

2. **Make your brand discoverable for voice**

3. **Personalise to cut through the noise**

---

**Activating Voice Search Today**

Our research shows that already 15% of the UK adult population are using voice to search or interact with devices. Perhaps unsurprisingly the majority of people are using voice interaction with the device that is most accessible, with 57% interacting using voice on their mobile phone. This figure is four times more than those who use voice to interact with smart home digital assistants such as Amazon Echo and Google Home. The majority of people use voice interaction for information seeking, but 25% of people have used voice to fulfill purchase intent, with 10% of people having used voice to locate a retail or store location. Also perhaps unexpectedly, Voice interaction is anything but a millennial trend with over 17% of 35-54 year olds and 11% of those 65+ using their voice to search.

**Voice Search: Motivations and Behaviours**

**Today 2017**

- 57% use voice to search and interact
- 76% use voice with only one device

**Tomorrow 2020**

- 50% use voice to search and interact
- 6% use voice with multiple devices

2017: Smartphones are driving Voice Search

2017: Voice Search is predominantly being used for narrow queries

2017: Voice Search is not just a millennial trend

1. Behshad Behzadi, principal engineer at Google Zurich, March 2016
2. Stone Temple, 5000 questions about factual knowledge, May 2017
3. Google Trends, August 2017
Be prepared with feeds

Brands that retail online or offline should invest in inventory feeds, not only for inventory available online but also product stock levels available in stores. Our research reveals that 25% of people who use voice are interacting with the intention to make a purchase. Making accurate product inventory available is more important than ever.

With clear local and omnichannel behaviours emerging – some 10% of those that use voice use it to find a store location – we can anticipate new opportunities to leverage local product inventory in voice search and voice enabled devices.

Make your content more discoverable with structured data

Using semantic markup or structured data makes content more discoverable. This works by using set syntax to explicitly describe a page in a way that a search engine can easily ingest and better understand.

Semantic markup, often referred to as schema markup, is essentially a consistent way to structure information as structured data. For example there is schema markup for local businesses allowing business addresses, phone numbers and opening times to be structured so that search engines can ingest them and accurately answer questions for users.

Search engines such as Google and Bing can also display featured snippets in response to a search query. Rather than rely on structured data, featured snippets are served using content that answers the query. Content that answers a specific question, and uses heading tags and ordered lists correctly is more likely to be served to users via voice.

Deploy a content strategy that answers the questions people are asking, particularly on mobile

Most brands already have a content strategy in place, now is the time to review whether it aligns with the questions audiences are asking, and whether changing query behaviours present new opportunities to connect with those audiences.

Voice searches longer through the tail

Speech searches more concentrated around 1-3 words

Text searches more concentrated around 1-3 words

Search query length based on speech vs text input

Source: Microsoft internal data December 2016

This table shows how queries with the same intent are phrased differently via text and voice

<table>
<thead>
<tr>
<th>TEXT</th>
<th>VOICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weather</td>
<td>Weather Oxford</td>
</tr>
<tr>
<td></td>
<td>What is the weather in Oxford like today?</td>
</tr>
<tr>
<td>News</td>
<td>BBC weather</td>
</tr>
<tr>
<td></td>
<td>Do I need an umbrella?</td>
</tr>
<tr>
<td>News</td>
<td>BBC news</td>
</tr>
<tr>
<td></td>
<td>Tell me today’s news</td>
</tr>
<tr>
<td>News</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Give me the latest news</td>
</tr>
<tr>
<td>Flights</td>
<td>Live Heathrow departures</td>
</tr>
<tr>
<td></td>
<td>What time does flight BA009 depart?</td>
</tr>
<tr>
<td>Flights to Barbados</td>
<td>Flights to Barbados</td>
</tr>
<tr>
<td></td>
<td>How much is a flight to Barbados?</td>
</tr>
<tr>
<td>Retail</td>
<td>IKEA</td>
</tr>
<tr>
<td></td>
<td>Where is my closest IKEA?</td>
</tr>
<tr>
<td>Retail</td>
<td>Levi’s</td>
</tr>
<tr>
<td></td>
<td>Where can I buy blue Levi 511s?</td>
</tr>
<tr>
<td>Food</td>
<td>Restaurants</td>
</tr>
<tr>
<td></td>
<td>What restaurants are near me?</td>
</tr>
<tr>
<td>Food</td>
<td>Katsu curry</td>
</tr>
<tr>
<td></td>
<td>How do I make a katsu curry?</td>
</tr>
</tbody>
</table>

Voice search or spoken queries tend to be more ‘longtail’ than text queries. A verbal query has a higher query length, which means it has more words, whilst text queries are much more concentrated - usually around 1-3 words. Research based on Microsoft internal data presented in the joint Bing & iProspect, ‘Digital Assistants | Reordering Consumer Lives and Redefining Digital Marketing’ demonstrates just how different query length is between speech and voice.

Brands need to ensure they have a longtail search strategy that leverages the nuances of voice search to their advantage, considering the increase in queries formed as questions and implementing smart match type strategies to capitalise on longtail search behaviours.

In practice this means bidding to match for longtail queries and searches that use common interrogative words such as how, what and where, creating ad copy and content to align to more question based, conversational queries.

2. Make your brand discoverable for voice

When there is only one answer, how do you make sure consumers hear it from you? In the context of search, making your brand discoverable for voice is not so much a new challenge, but rather the evolution of what many are already doing in content creation and site optimisation.

The majority of voice interactions are with the devices everyone is already familiar with, rather than smart home based digital assistant devices such as Google Home or Amazon Echo. Our research shows that 57% of people using voice interactions are doing so with their mobile phone.

• Make your content more discoverable with structured data

Using semantic markup or structured data makes content more discoverable. This works by using set syntax to explicitly describe a page in a way that a search engine can easily ingest and better understand.

Semantic markup, often referred to as schema markup, is essentially a consistent way to structure information as structured data. For example there is schema markup for local businesses allowing business addresses, phone numbers and opening times to be structured so that search engines can ingest them and accurately answer questions for users.

Search engines such as Google and Bing can also display featured snippets in response to a search query. Rather than rely on structured data, featured snippets are served using content that answers the query. Content that answers a specific question, and uses heading tags and ordered lists correctly is more likely to be served to users via voice.

Be prepared with feeds

Brands that retail online or offline should invest in inventory feeds, not only for inventory available online but also product stock levels available in stores. Our research reveals that 25% of people who use voice are interacting with the intention to make a purchase. Making accurate product inventory available is more important than ever.

With clear local and omnichannel behaviours emerging – some 10% of those that use voice use it to find a store location – we can anticipate new opportunities to leverage local product inventory in voice search and voice enabled devices.

57% of people using voice interactions are doing so with their mobile phone.
Preparing for Voice Search Tomorrow

As Amara’s law suggests, it is the long-term effect of digital innovation that often gets overlooked. It is prudent to think further into the future, and we believe brands need to consider two things when implementing a Voice search strategy.

1. **Being relevant and helpful across an increasing number of connected devices**

   Our research supports previous evidence which shows the lion’s share of voice searches are still taking place on mobile phones rather than smart home hubs and tablets (57% versus 30% respectively).

   As a result, ‘on the go’ searches which we’ve seen accelerate over the past few years with the growth of mobile are quickly becoming some of the first to gain verbal traction too. For example 10.2% of our voice searchers said they use voice search to ‘Find a Store Location’, a relatively high number when we consider checking the weather, a more universal query, sees 19.8%.

   It’s easy to see how local voice search will become even more prevalent as car manufacturers make the move towards connectivity. Ford, who are currently partnering with Amazon to introduce Alexa to its new models, predict that nearly 90% of all new vehicles will have Voice Recognition (VR) on-board by 2022, and they aren’t alone in the move to Voice.

2. **Delivering the Conversational Experience people want**

   At CES in January 2017, three other major manufacturers announced their plans to partner with Bing, Google or Amazon. Local retailers, restaurants, even petrol stations will soon need to ensure they can be easily found with a Local search strategy which ensures they are quickly discoverable within local search platforms such as Google Maps, Waze or Yelp.

   As an ever growing number of devices, beyond your mobile phone and Amazon Echo; become Internet enabled, the opportunities to engage with consumers verbally will grow. It’s perhaps not easy to imagine the search and conversational experience your brand might be able to have with someone through their toaster, hairbrush or smart mirror, but the ‘Internet of Things’ will give rise to a new wave of consumer behaviour and expectation.

   In answering this expectation, brands will need to consider how they can be useful and relevant to differentiate themselves, delivering the conversational experience people want, when they want it, where they want it, and on whatever device they want it.

---

3. **Personalise to cut through the noise**

The challenge is, how do brands ensure they are likely to become visible where there is only one search result, (as is increasingly becoming the case in voice search)? Strategies that take into account the differences in voice query behaviour, mobile readiness, voice content strategies, schema markup, feeds and structured data can only ever have a certain amount of impact.

The reality is that not everyone is every brand’s target audience. Everyone has a group to target, with a specific product. It’s even true that within a certain audience, not every product will be right for every search.

For example, even with all the explicit intent of a voice query, the answer to the question ‘What’s the best hybrid car?’ is not the same for a family of six doing the school run as it is for a single business commuter.

Personalisation is key to cut through the noise and target only those for whom the products have relevance and the brand has resonance.

Brands need to achieve personalisation via tailored targeting and messaging, using everything at their disposal, to make sure that when there is only one answer, theirs is the one that gets heard.

Even at the point of search, we are able to tailor to a consumer’s interests, behaviours and previous interactions. As marketers we need to use our 1st party data and every other signal we have to deliver tailored, relevant experiences for consumers.
The most important thing to remember when developing conversational experiences is delivering something that works and has a use. Answer their basic needs. Add value. It’s what the best bots – voice or not – do best.

Conversational bots are becoming the norm and brands need to factor this in when bringing their customer experience to life. We believe there are two main reasons why this isn’t a trend to be ignored:

• Reduced error rate – When Apple first debuted Siri in 2011, the experience tended to be frustrating – who could forget some of those videos of Siri struggling to make sense of strong dialects. Today, the average speech recognition error rate is around 8%.

• Increased speed – Today’s society is obsessed with speed (especially younger audiences) so being able to access this information faster is appealing. The average human can speak 150 words per minute, whereas they can only type 40 words in that time.

By 2020, 85% of customer interactions will be handled by a machine and will be the #1 way for businesses to differentiate themselves from competitors.

CASE STUDY: IKEA
Utilising search to drive footfall
IKEA were one of the first brands in the UK to embrace using search as a means of driving footfall into stores, measuring the impact to improve their Local Search strategy.

By integrating store visit data into their measurement, IKEA saw for the first time how their search activity impacted not just sales online, but also drive shoppers into their stores.

The result? 10.6% of the people who clicked on IKEA’s search ads went on to visit a physical store. That number was even higher on smartphone devices. By incorporating store visits data, search ROI was demonstrated to be 5x higher than if it were to have been measured on online sales alone.

So why is this relevant to voice? Already we observe significant local intent in voice search. With this only set to grow with the increasing use of voice as a way to engage with devices, and the increasing prevalence of voice enabled devices, measurement frameworks that attribute the full value of voice will be key. It will be brands such as IKEA that will be first to succeed in capitalising on the local and omnichannel opportunities voice presents.

2. Delivering the Conversational Experience people want

It wasn’t that long ago that any interaction we had with computers, and therefore the web, had to be typed in long form in order to get anything meaningful in return. Users had to go hunting for the desired information across search engines and brand pages. Now that touchscreens and wearable interfaces have become the norm, the expectation is to have all of the world’s information at our fingertips.

We are now witnessing the age of conversation with the machine. Our voice can be used as a method of controlling our devices, accessing information and even turning on and off household appliances. And it’s not just voice, with developments in AI and machine learning, we’re conversing with bots on a regular basis for everyday activities like customer service, booking cinema tickets and ordering pizza. By 2020, 85% of customer interactions will be handled by a machine and will be the #1 way for businesses to differentiate themselves from competitors.

The most important thing to remember when developing conversational experiences, is delivering something that works and has a use. Answer their basic needs. Add value.

It’s what the best bots – voice or not – do best.

By 2020, 85% of customer interactions will be handled by a machine and will be the #1 way for businesses to differentiate themselves from competitors.

3 Behshad Behzadi, principal engineer at Google Zurich
Will YOU be ready for the next search revolution?

Whilst voice and associated growing trends shouldn’t be underestimated in terms of the impact they will eventually have, we know that 85% of people are still typing their queries into search engines and therefore brands are faced with the challenge of when and how to begin transforming their marketing approach for the shift which is most certainly coming.

The good news is that the steps we’ve outlined here will deliver performance from search right now. Reviewing keyword strategy to include new and emerging queries, feeding in structured data to bidding approaches, and using audience data to personalise the search experience will all result in better consumer experiences and better returns for brands.

Brands are faced with the challenge of when and how to begin transforming their marketing approach for the shift which is most certainly coming.