

2021

MMA | isobar

# THE VOICE PLAYBOOK

POWERED BY

SLANG  
LABS





This playbook is a quick simple guide for you to step into the wide arena of voice technology. Don't get intimidated, it's going to be a thrilling journey!

At Isobar India, we truly believe that the voice revolution has begun. The amazing thing about voice is that it breaks the barriers of language and education – opening doors for millions of Indians to benefit from it. Voice is a game-changer and getting consumers much closer to the brands than they have ever imagined.

The use of voice search is on the rise in India and platforms such as Alexa, Google assistant, and Jio voice search are seeing a phenomenal growth.

Voice technology is playing a pivotal role in fueling aided commerce growth as 82% of smartphone users are using voice-activated technology. The overall share of voice technology is currently at 28% of mobile users with Hindi leading the pack of 400% growth every year. The voice platform is going to lead the next wave of content searches, social conversation, and eventually, it will also become the medium of commerce in India across markets.

Voice will enable hands-free interaction between you and your device, thus, bringing down most of the actions done today such as type, tap, or swipe.

This Playbook will help brands embrace the journey of onboarding their audience on voice with much ease and establishes key steps the brands need to follow to launch an always-on Voice Strategy.

So, let's dive deeper into voice led conversations.

**Shamsuddin Jasani**  
Group MD, Isobar South Asia



The journey to enlighten, empower and enable marketers continues as MMA Global continues to shape the future of modern marketing, while propelling business growth today through evangelism, education, skilling and advocacy.

New technologies, new competitors and new customer expectations in today's environment have forced marketers to make structure changes and increase relevant resource levels to meet demands that are emerging therein.

We are seeing rapid adoption of collaborative Commerce with people using the mobile and connected devices to sell products and services and AI enabling personalization. On the other side VR/AR are helping deliver immersive customer experience.

Voice technology is integral in the entire value chain right from pre-sales to after sales making experiences immersive and accessible to a large section of the society irrespective of language, literacy and social strata. Platforms like Google Assistant, Alexa and specialised agencies/solutions providers have played a huge role in powering voice.

India has seen a transition from feature phones to smart phones in the recent years and as we know India is the second largest mobile Internet market after China. It also is a voice first market hence a very fertile ground for voice laid experiences to take off. As per the MMA Modern Marketing Reckoner, 57% of marketers feel voice search can make significant impact. Voice Search queries in India are growing by 270% per year whilst 82% of smartphone users use voice-activated technology.

MMA has always been at the forefront of driving modern marketing capabilities, new and emerging media opportunities. We seek to create leadership, evangelism and a neutral repository for marketers to better understand the dynamically evolving nature of voice marketing by enabling thought leadership, guidelines, use cases and toolkits to better utilise the growing demand.

We are working with our dedicated council on Voice & Audio closely to set standards, guidelines and increase adoption. The Voice playbook is a complete toolkit to help marketers better understand the landscape globally and locally, seek best practices, learn from the work done in the space as well as use it as a guide to build a robust voice strategy. We look forward to your participation and contribution in the future editions of the playbook as well as inputs on what more would you like to seek from our resource centre to be better equipped on voice as marketer.

**Moneka Khurana**  
Country Head India, MMA



Marketing is the only major function in an organization which is constantly future-focused and exploring new opportunities for growth and sustainability of brands.

Naturally, marketers are at the leading edge of innovation and help evolve the roadmaps for the future of technology adoption within an organization in the digital age. Most of the leading technologies omnipresent today are the result of such constant exploration and experimentation by innovative, forward-thinking marketers who have pushed the boundaries of businesses to propel them to new heights of success and innovation.

Today we see the internet, mobile technology and social media changing the fate of not just brands but even elections across the globe from Africa to America and India! A similar social and economic revolution is brewing now - the Next Billion Users are poised to cross the digital chasm, but they face fundamental hurdles like spelling in English and hard-to-comprehend Touch UI that bar them from engaging online with businesses.

And these millions of consumers need an easier, more natural interface in their own language to enable them to be on par with their digital-savvy counterparts.

Voice technology is the most natural solution for brands to elevate their brand engagement and experience for their current and future customers. Voice technology is at that point of evolution today where mobile technology was a decade ago -

so many questions, so many ideas, so many options and very few concrete solutions that show a clear path forward for experimentation and adoption - and, of course, success. That's the reason, we have brought out this Voice Playbook for Brands (2021) where we have made a sincere effort with MMA and Isobar to unravel the entire voice technology and adoption landscape with facts, figures and success stories globally and in India. We hope more marketers will be inspired by this Voice Playbook to drive the next generation of technology adoption by brands and customer experience for their consumers.

May the voice experiments begin!

**Kumar Rangarajan**

Co-founder & Obsessive Dictator, Slang Labs

## Table of Contents

---

01 Global Voice Market .....	1
02 Indian Voice Market .....	10
03 Changing Consumer Market & Opportunities .....	18
04 Opportunities for Brands .....	23
05 Helping Brands have a Voice .....	30
06 Brand Voice Content Creation and Discovery .....	46
07 Brand Voice Consumer Journey .....	52
08 Voice Marketing & Monetization .....	67
09 Challenges Faced by Voice Assistants .....	71
10 Early Adopters & Future Predictions .....	74
13 MMA Initiatives .....	91

01

# Global Voice Market



Increasing demand for voice-activated systems, voice-enabled virtual assistant system, and voice-enabled devices is driving the market growth, owing to the rising applications in retail, banking, connected devices, smart home, healthcare, and automobile sectors.

The Voice Recognition Market was valued at USD 10.70 billion in 2020 and is expected to reach USD 27.155 billion by 2026, at a CAGR of 16.8% over the forecast period. Increasing demand for voice-activated systems, voice-enabled virtual assistant system, and voice-enabled devices is driving the market growth, owing to the rising applications in retail, banking, connected devices, smart home, healthcare, and automobile sectors.

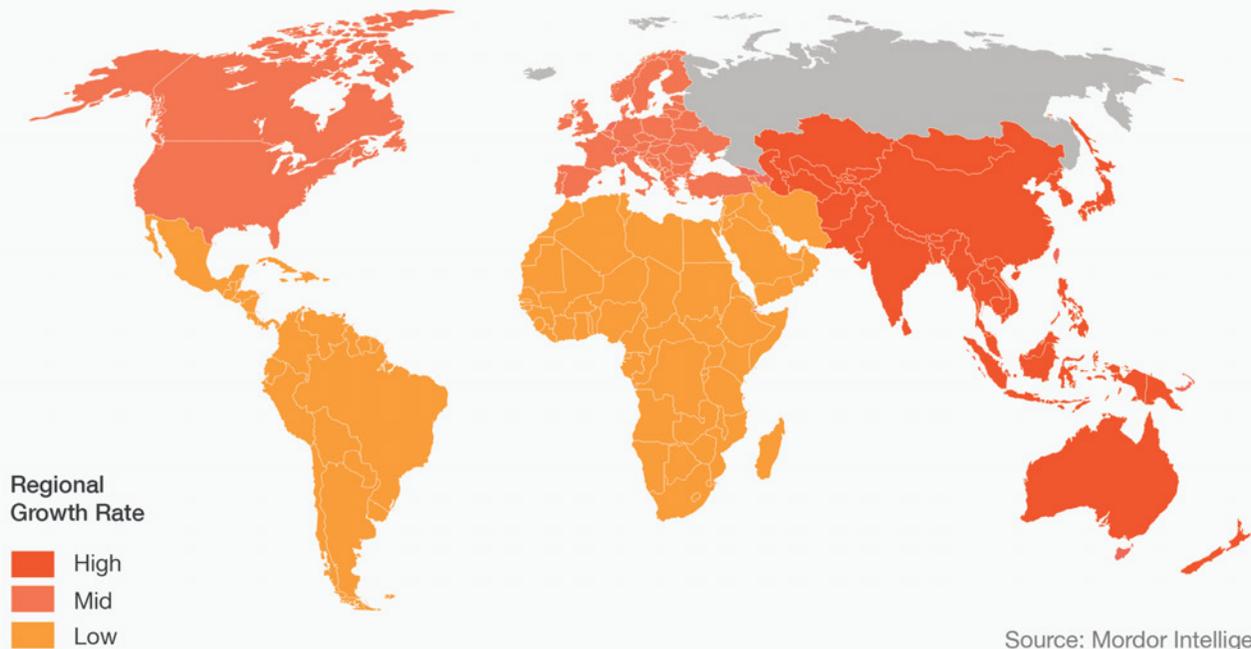
The ever-increasing requirement of authentication in the BFSI industry is expected to boost the voice recognition market even further. The application includes voice recognition as a form of biometrics to tackle fraudulent transactions. According to Tsinghua University, China, the demand for biometric recognition technologies in China is expected to reach CNY 34 billion by 2021.

Voice-based searches have been highly adopted by various consumer demographics. ComScore – an American Analytics Company predicted that by 2020-21, 50% of the searches are estimated to be voice-based.

The adoption of voice recognition technologies adds to the efficiency of various processes, as an average person can speak about 150 words per minute while only 60 words can be typed in, in that time.

According to Google, 20% of queries on Google's mobile app and Android devices are voice searches and the number is expected to grow exponentially, more so because Google's voice assistant is now available on more than 400 million devices.

## Voice Recognition Market - Growth Rate by Region (2019 - 2024)



Globally, voice assistant industry players are leveraging market growth through product partnerships, mergers & acquisitions, and geographic expansion. For example, in November 2018, Microsoft Corporation acquired XOXCO Inc., to enhance its approach of democratizing AI development, dialogue and conversation, and integration of conversational experiences.

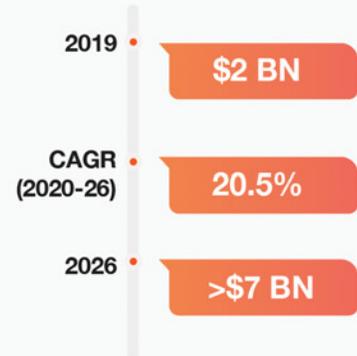
## Voice Recognition Market

APAC market CAGR  
(2020-26): **23.5%**

Europe market share  
(2019): **30%**



AI-based voice  
recognition segment  
market share  
(2019): **> 60%**



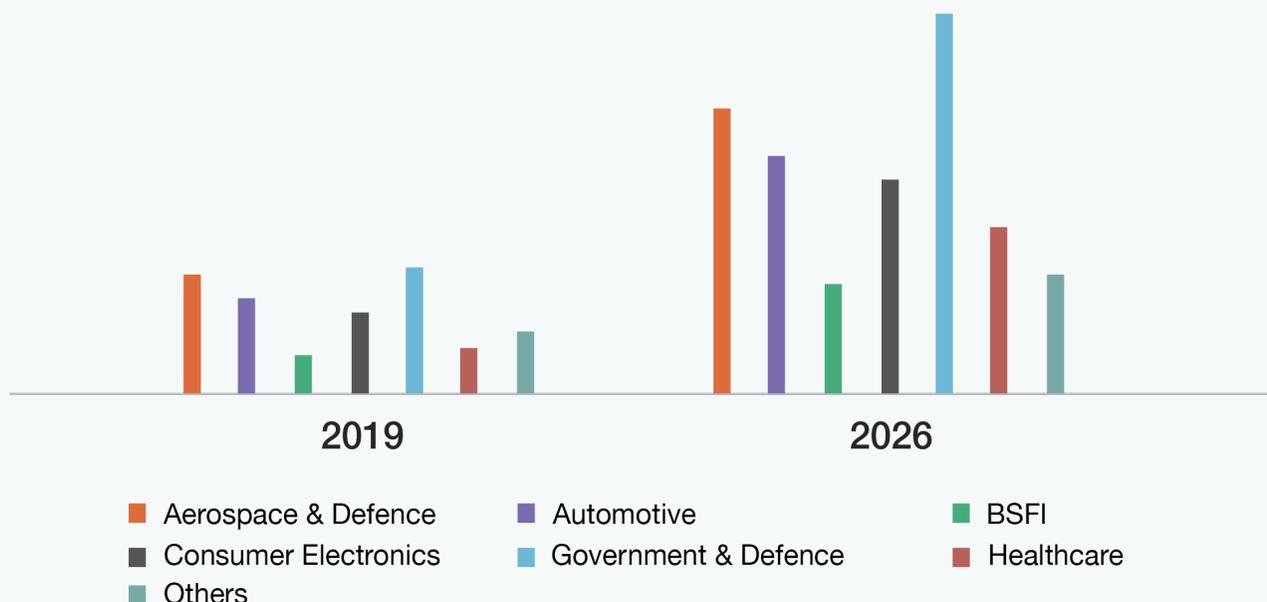
Source: Global Market Insights

Based on vertical, the voice assistant market is segmented into BFSI, retail and e-commerce, healthcare, automotive, and others. Among these segments, the BFSI category held the largest share in 2018. This attributed to the high demand for financial institutes with AI-powered voice assistants, to increase customer experience and incline towards digitalization.

However, the healthcare industry is anticipated to witness the fastest growth in the market during the forecast period, owing to the rising adoption of the Internet of Things (IoT), growing focus on patients' engagement, and a growing number of chronic disorders.

The automobile sector is expected to gain momentum shortly, owing to advancements in technology and the emergence of innovative concepts such as autonomous and connected cars. Increasing integration of voice-activated software in next-generation cars is likely to stoke the growth of the market during the forecast period.

U.S. Voice Recognition Market Size, By End-Use, 2019 & 2026



Source: [www.gminsights.com](http://www.gminsights.com)

# The rapid growth of digital banking along with an increasing number of identity frauds in the BFSI sector is driving voice recognition market growth.

Amid the current COVID-19 pandemic situation governments as well as SMEs are furiously investing in technologies such as voice assistance, Chatbot, NLP, etc. Recently, in April 2020, France Research Institute launched an AI-based voice assistant to help COVID-19 Patients. With the rising cases of COVID-19, the voice assistant found its way into the healthcare sector. A similar feature has been added in the form of a host of rapid upgrades - Amazon's Alexa, Apple's Siri and Google's Home Assistant for virtual assistance.

AI-based voice and speech recognition software is projected to witness a high CAGR during the forecast period, owing to the continual development of machine learning techniques and integration of connected devices with personal assistants. For instance, Dragon Drive - a personal assistant developed by Nuance Communication Inc., integrates various household appliances, cars, and smartphones that can be connected to a hub through the internet. Thus, an individual can get alerts about daily chores, work schedules, traffic updates, and many more alerts through it.

However, the lack of accuracy of these technologies in recognizing regional accents and dialects is anticipated to limit the growth of the market. Additionally, sentiment analysis using changes in the pitch of the voice can provide growth opportunities to the voice and speech recognition software market.

The AI-based segment accounted for more than 60% of the voice recognition market share in 2019. With the advent of the AI model, the capability of voice biometrics systems has improved exponentially. These models can process a much larger dataset with more accuracy compared to the traditional models.

The AI-enabled voice recognition system is trained to identify various components such as accent, semantics, context, and words from foreign languages.

Increasing demand for AI-based voice recognition to gain insights, enhance efficiency and identify relevant information from large databases.

## Geography Insight

Geographically, North America has accounted for the largest share in the voice assistant market, globally and is predicted to grow significantly during the forecast period. The growth of this market is attributed to the existence of a large number of established players in the U.S. – increasing number of investments related to the adoption of AI, increasing preference for automated work operations in contact centres, huge investment in IT, and increasing adoption of emerging technologies, such as machine learning, natural language processing, and deep learning in the region.

## Competitive Insight

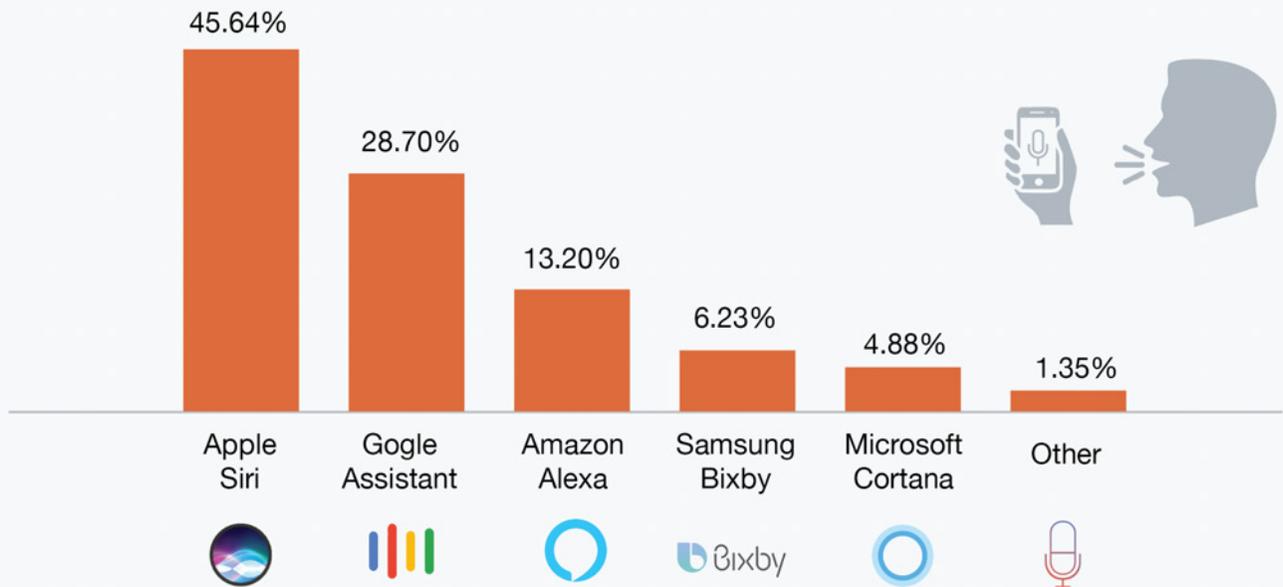
### Major Players

	<b>NUANCE</b> Nuance Communications Inc.
	<b>AURAYA</b> Auraya Systems Pty Ltd.
	<b>Microsoft</b> Microsoft Corporation
	<b>Apple Inc.</b>
	<b>Alphabet Inc.</b>

The most well-known voice assistants and speakers are illustrated below

						OTHER
<b>Voice Assistants</b>	Alexa 	Gogle Assistant 	Siri 	Cortana 	Bixby 	Facebook + Ozlo 
<b>Voice Enabled Speakers</b>	Echo 	Gogle Home 	HomePod 	Invoke 	Bixby Speaker 	SoundHound  Nuance Nina ID 

## Siri Remains The Most Used Mobile Voice Assistant Market share of voice assistants in the U.S. (May 2018)



Source: voicebot.ai

The most popular voice digital assistants are Apple Siri, Amazon Alexa, Google Assistant, Microsoft Cortana, and Samsung Bixby. Siri owns the largest market share in the US, with 41.4 million monthly active users. As far as smart speakers, Amazon Echo leads the pack, with a 66.6% share of the 61.1 million voice-assisted devices in use in the U.S. Other popular smart speakers (US) include Google Home, Apple HomePod, Harman Kardon Invoke (powered by MS Cortana), among others. Amazon is now licensing the Alexa product and it is embedded on multiple third-party devices, like Sonos speakers. While most voice assistants have similar functionality, key differences emerge from their parent company's heritage and vision. Siri's greater market share is partly explained

by being the first to market, in addition to Apple's dominance on smart mobile features. Cortana, linked to Windows and everything Microsoft, displays a greater focus on productivity. Google Assistant's strength resides in the longstanding history of the Google search engine, making it one of the most powerful voice assistants in the market. And Amazon's Alexa aims at integrating itself to whole-house management and services, as a link to Amazon's vast e-commerce empire.

# Market Concentration



Source: Mordor Intelligence

Some of the key players operating in the [global voice assistant market](#) are IBM Corporation, Salesforce.com Inc., Amazon.com Inc., Apple Inc., Microsoft Corporation, Verint Systems Inc., Nokia Corporation, Alphabet Inc., Orange SA, and Samsung Electronics Co. Ltd. These players are adopting several growth strategies, such as new service launches and partnerships to expand their presence further during COVID-19 times.

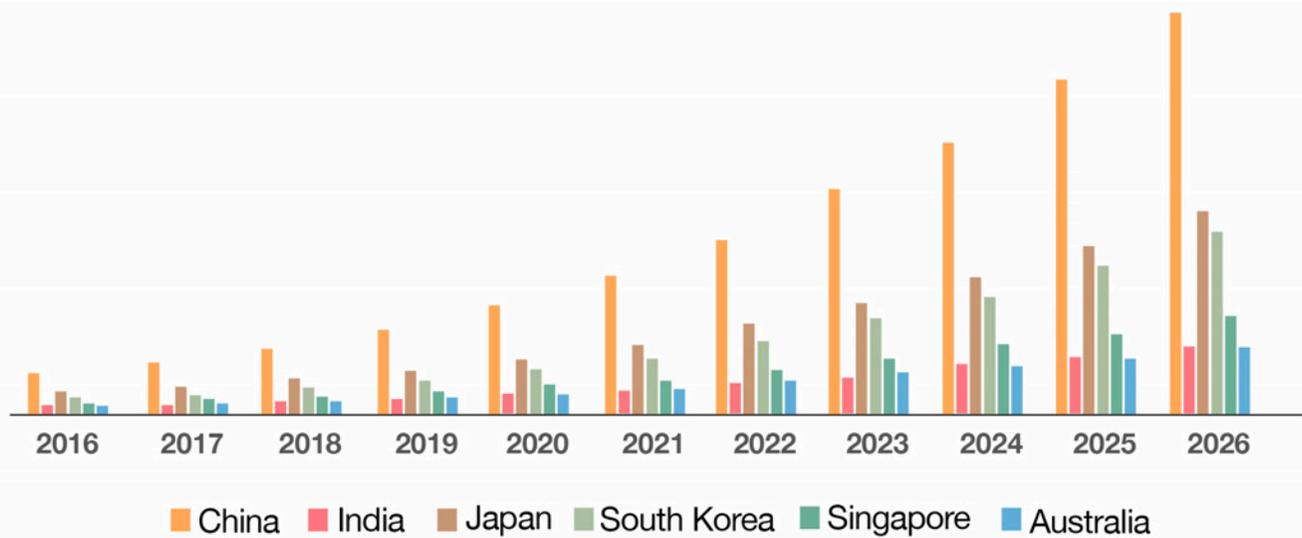
Among these, IBM Corporation, Nuance Communications, Amazon.com Inc, Microsoft Corporation, Google Inc, Apple Inc, Samsung Electronics, and Cisco Corporation collectively account for more than 40% of the global voice assistant market share. The limited presence of providers of voice assistants as opposed to a high market demand increases the intensity of the rivalry among the players. Also, the key companies are heavily investing in acquisition and research to enhance product development, which is expected to strengthen their global presence.

Therefore, the global voice assistant market is expected to witness a high intensity of rivalry during the forecast period.

Aggressive product launches remain a key strategy amongst players in the market

November 2018 | Report Format: Electronic (PDF)

Asia Pacific Voice Recognition Market Size, By Country, 2016 - 2026



Source: [www.gminsights.com](http://www.gminsights.com)

Penetration of biometric voice-enabled smart devices in Asia Pacific is driving the market growth

The Asia Pacific voice recognition market is estimated to witness a 23.5% CAGR through 2026 due to the rising adoption of smart electronics devices. As of December 2019, India had 502.2 million smartphone users with 77% of users accessing the internet through smartphones. Consumer electronics devices including security systems, game consoles, access control door locks, home automation and mobile devices are being integrated with biometric-based voice recognition technology that offers hands-free activation and interactive actions using voice commands.

With the increasing production and consumption of electronic devices in the region, the market demand for voice recognition technology is expected to grow over the forecast period.

02

# Indian Voice Market



# Personal voice assistants are expected to outnumber the world's population by 2024. In India alone, the voice market is expected to grow by 40% in 2021.

Voice technology was already on the rise before the pandemic. Personal voice assistants are expected to outnumber the world's population by 2024. In India alone, the voice market is expected to grow by 40% in 2021. Xiaomi and Baidu – tech giants in China, experienced over 160% year-on-year growth in their smart speaker sales in Q4 2019. But the virus – and the subsequent need for both human-injected and contactless experiences – served to increase both its pace and popularity. Soon, consumers will expect to have a voice option at self-checkout counters, ATMs, automobiles, elevators and anywhere else touch is currently needed. XIOLIFT – a China-based elevator manufacturer, is already working to reduce the touch-transmission of germs by experimenting with voice-activated elevators. This change in consumer habits would otherwise have taken years – and businesses understand that. The shift from touch to voice will only accelerate further in the future. Although, the impact of voice will be felt across industries. It will be game-changing for the banking and financial services, retail, manufacturing, and travel & hospitality industries. Industries have started believing that if they don't embrace voice interfaces, they will lose ground to competitors in the next five years. Just like companies needed an internet strategy in the '90s, a search

strategy in 2000 and a mobile strategy in 2010, they now need a voice strategy.

In India, the country's growing cohort of [new internet users](#) has unique and nuanced needs, especially when it comes to their preferred online language. With [more than 70% of these new internet users](#) already choosing to consume content in their mother tongue, there is a growing number of Indians leaning into voice technology to help them search online and carry out tasks in languages other than English.

This rapid adoption speaks volumes for the desire of [local-language users](#) in India, who would use voice as an alternative to typing. Here, we look at the drivers and opportunities for brands to adopt voice technology as a means to solve unique problems for the world's second-largest population.

Voice technology is fundamentally changing the way we use our devices, often in ways, we didn't expect. From asking how many millilitres are in a cup to searching for nearby petrol pumps or grocery stores, people are turning to voice functionality for myriad purposes.

Globally, over [500 million people](#) use Google Assistant every month, with Hindi second only to English as the most [commonly used language](#).

This trend of using voice technology is not simply confined to assistants or smart devices in homes. It's also shaping the way Indians interact with their smartphones. Voice is emerging as the preferred way for people to use Search and browse YouTube.

Indians find more familiarity with voice. Google's year in search report highlights the importance of targeting these NBUs. Advancements in speech recognition have enabled a better understanding of Vernacular Indian languages. Leveraging Voice will help NBU, who are not familiar with a smartphone to interact with the app intuitively. 70% of the users are bypassing laptops and desktops and directly using smartphones.

Using voice is a more natural way for people to interact with technology, and voice functionality already exists across a variety of apps. But in India, where mobile is the primary device of choice for many people, voice is allowing users to engage with technology in their preferred local languages, enabling voice to become a core part of the user's life that goes beyond convenience.

Currently, 60% of users in India are interacting with voice assistants on their smartphones.

People often start using simple commands but very quickly turn to experiment with more complex dialogue. For example, people might type "weather Kanpur" in Search, but they'll ask Google Assistant more conversational queries, such as "What's the weather today in Kanpur at 3 P.M.?"

Despite being a relatively new technology, voice assistants are quickly becoming more localized. Many voice assistants can understand accents and vocabulary not just in Hindi but also in other regional languages, helping overcome literacy barriers.

This is an important step toward encouraging voice adoption — by 2021, it's estimated that 72% of internet users in India will prefer to use a language other than English, and voice will help bridge that language gap by allowing users to interact in a way that is familiar to them. On average, Google Assistant queries are 200 times more conversational and 40 times more action-oriented ("Ok Google: Turn on the lights in the living room") compared to using Search.



By 2021, **~72%** of internet users in India will prefer to use a language other than English, with voice driving adoption.

Source: Google Wat consult study

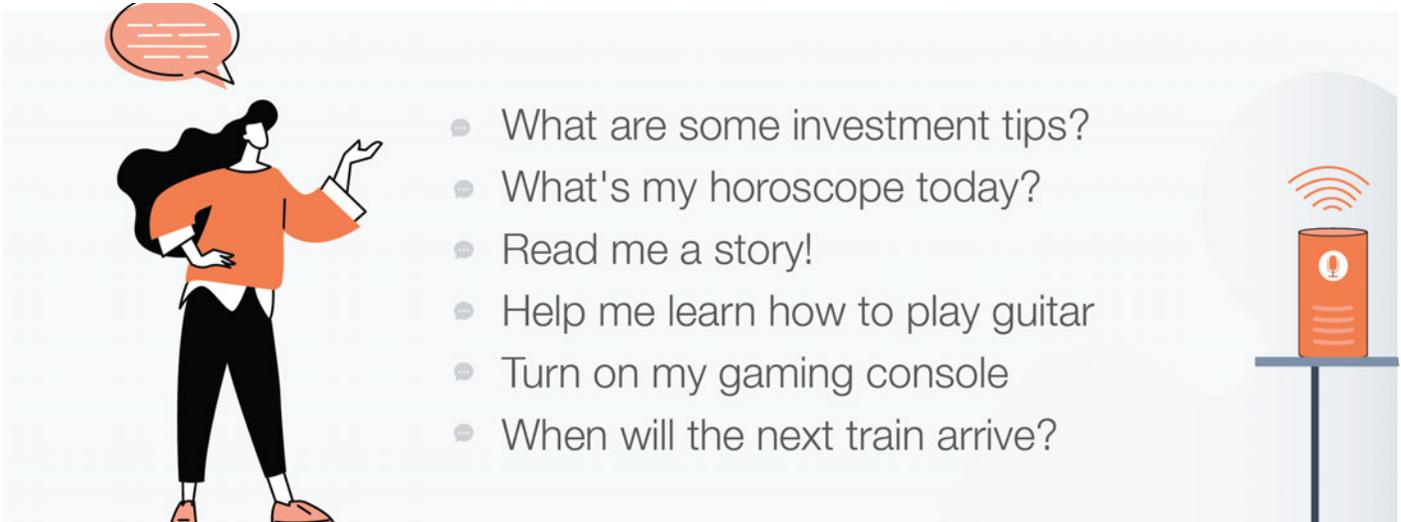
Not only are people asking detailed questions, but because the majority of Indians are multilingual, they find voice three times faster than typing. During the 2019 cricket season, Google Assistant received over 100 million cricket queries as people asked for news and live score updates. This means people of all ages and geographies can engage with voice-enabled technology more easily because it mimics normal conversation.

An ecosystem has begun to develop around voice technology, with brands, developers, agencies and start-ups, investing in ways to provide greater functionality and usability. Brands across all categories such as consumer packaged goods, durables, food tech, E-commerce, and even retail have started to experiment with voice technology, finding ways to solve user needs.

When Gaana, India's largest music streaming service, wanted to expand its audience to users from rural India, the brand added voice search functionality to its app as a way to overcome literacy barriers among new internet users. Within a year of launch, 24% of all Gaana users were using voice to play their favourite songs.

App developers and technology agencies have also warmed up to voice, helping brands design voice-first user experiences for their products. There are currently over 1 million actions that users can ask on Google Assistant, such as, "When can I see the International Space Station next?" and "Play Gaana Antakshari (a popular music game)" as well as commands for controlling smart devices and ways to improve health and wellness.

## The ways people are using voice



- What are some investment tips?
- What's my horoscope today?
- Read me a story!
- Help me learn how to play guitar
- Turn on my gaming console
- When will the next train arrive?

We see similar traction with startups adopting artificial intelligence (AI), machine learning, and augmented reality to solve a host of user issues using voice. Mobile app [Vokal](#) provides answers to common questions posted by consumers in their language. [Reverie Technologies](#) has developed an Indic voice suite called Gopal to help businesses engage with non-English customers in 12 Indian languages. [Dhiyo](#), an AI-powered voice platform for job seekers, enables blue-collar workers to create their résumés by simply speaking into their smartphone.

Google Assistant, Amazon's Alexa, Apple's Siri, and Microsoft's Cortana are helping users with millions of results for voice-led queries each day. Not only search but 'Voice' is also touching upon several aspects of our day-to-day lives. From being used for setting alarms and reminders, playing music to reading news, calling a friend, ordering food, tracking shipments, and booking tickets, it is everywhere! That is also one of the reasons why India is among the world's fastest-growing voice markets, with 52% of its mobile users talking to voice assistants every single day.

The integration of Indian languages in voice assistants has been the strongest growth driver for the tech across the six-to-sixty age spectrum. This is in line with studies indicating that the internet in India is growing increasingly vernacular by the day. As high as 75% of internet users in the country would be consuming content in vernacular languages by 2021. Nearly 16% of Indians use a voice assistant speaker, and 36% use smart home devices like Internet-connected thermostats or home audio systems.

Early 54% of Indians now use at least one wearable device. The smart home is at a similar turning point: 30% use a smart TV, 16% use a voice assistant speaker like Alexa-rich Amazon Echo or Google Assistant-driven Home, and 36% use smart-home devices like Internet-connected thermostats or home audio systems.

The market for speech and voice recognition is set to grow to 40.47% to reach ₹210.63 crores by end of 2020, states a new study. The market was ₹149.95 crores as of December 2019. The emergence of voice technology has been brought on by the rapid rise in internet consumption across the country.

Smart speakers are very popular among the kids who mostly use those for educational content, listening to mythological stories quizzing and playing games.

“However, playing music and setting alarms, asking for information from the internet are some of the popular tasks that Indian users prefer asking voice assistants.”

## Smart Speaker Use Case Frequency, January 2020



Source: voicebot.ai 2020

By the year 2020, more than 20% of search queries in India were already done by voice. And by 2021, 50% of all global searches will be voice searches. India is seeing 270% year-on-year growth in voice searches, as revealed by Google. One of the reasons for the humongous growth is because Voice is faster than typing. Also in rural areas, where people can't read or write in English, this technology comes handy.



Since the Indian market is one of the biggest and the fastest growing markets, big players like Amazon’s Alexa, Google Home etc, are now focusing and placing bets on Indian languages and the Indian market. Some of the major players in the voice Internet market are: Microsoft – Cortana Google – Google Now Amazon – Alexa Apple – Siri Samsung – Bixby.

Voice Integration within Apps is the trend in India and thus enabling more and more consumers to opt, engage and transact within the app.

## Big players focusing on Indian languages



E-commerce marketplace Flipkart acquired Liv.ai in 2018 to offer consumers a voice assistant that uses natural language processing to identify different accents in nine Indian languages. It also launched Saathi, a smart assistive technology to help users navigate through the website with the help of audio and textual instructions.

Paytm launched a SoundBox, that solves the problem of shopkeepers having to check their phone if a customer’s payment has succeeded with a voice alert.

KaiOS is an operating system that powers non-touch smart feature phones like Reliance’s JioPhone and JioPhone2. On KaiOS, people have the option to speak to a

voice assistant in their regional language and perform actions like sending messages on WhatsApp. Reliance & Google have invested in KaiOS’. Jio KaiOS devices are set to dominate the Indian market of Tier-2,3 regions in the coming years by selling as many as 100 million devices! When Google Assistant was launched on KaiOS the Google Assistant’s overall usage jumped by 6X.

Hindi is the second most used language in the entire world on Google Assistant. Apart from this vernacular push, Amazon is also powering up its app with Alexa, it is the homegrown Voice Assistant that can invoke searches and specific actions in the app.

In the run-up to the Great Indian Festival, Alexa answered over ~100K requests from customers on the Amazon shopping app to help navigate to their favourite stores such as the SMB Store, the Great Indian Bazaar, deals, gifting store and the Fun Zone.

To get more users to engage and try their Alexa Voice Assistant in India, Amazon even announced roping in Amitabh Bacchan as the voice of Alexa in India! This illustrates the seriousness with which Voice is being considered inside Amazon for the Indian market and also the kind of no-holds-barred investments that are being made in the same.

16% of the Flipkart users shopped for groceries using Voice Assistant in Hindi language and 82% of the surveyed users on Flipkart App preferred to use voice for grocery shopping in future. 95% of the users who used regional languages on Flipkart App prefer to continue to use the app in their regional languages itself.

Among the three new levers of engagement, Voice aided by Vernacular will be the most important driver of growth for Indian E-commerce companies in the next decade as it is the only pillar that supports transactional engagement for businesses. Not only does Voice with Vernacular increase the reach and expansion of the E-commerce platforms, but it also deepens the penetration in the urban areas where the hitherto hesitant audience will reluctantly shop more often on their platform - provided their journey is simple and conversational.

Apart from boosting engagement and interaction the in-app voice assistants can also help lead to more impressions on a website; for example, if users want more information at the end of a verbal answer, the assistant can direct them to open the home page or app, which in turn can help navigate the user to the website to read the complete text. They can encourage marketers to improve their content since it is projected that more than half of the searches will be voice-based by 2020, brands are inspired to create more engaging and newer content. The brand can help the assistant learn and retain information so that the conversation appears natural and informative.

India is already a large video-first [internet](#) market and with the demographics and large scale, smartphone adoption will become the world's first/largest voice-first internet. This means a large number of users will search with Voice on cheap smartphones. Voice is going to be very important shortly because in a market ecosystem like India, the next couple of million consumers who are going to come on board, might not be conversant with typing at all. This will be the audience that will heavily depend on tools like Voice to access services on the Internet. The new users would much rather speak to the internet than tap or type, as a result, voice search queries in India are growing at 270% per year!

03

# Changing Consumer Market & Opportunities



# Voice technology is playing a pivotal role in fuelling aided commerce growth as 82% of smartphone users are using voice-activated technology.

The overall share of voice technology is currently at 28% of mobile users, with Hindi leading the pack at 400% growth every year. The voice platform is going to lead the next wave of content searches, social conversation, and eventually, it will also become the medium of commerce in India across markets.

Voice can make brands more aware of their user choices. [Voice assistants](#) can distinguish between the voices of different users thus enabling brands to find out more about the choices of various people in one family. The insights will be more personalised based on the purchases they make, the brands they buy, the music they play and other such characteristics.

Voice assistants can bring innovation into [marketing](#), users can integrate this technology into their routine life to order groceries for home delivery, book a cab or even complete a funds transfer. Voice technology can also help eliminate the need to type the message and open up a whole new audience – and think beyond little children who don't yet know the alphabet or senior citizens who find mobile phone keys difficult to use.

Brands today are observing a change in consumer behaviour and have begun offering Indian customers new kinds of products, services and experiences on a new platform. With voice becoming the new UI aftertouch, it is also creating a different kind of marketplace.

Sreeraman from Agraphyah in his article on The Economic Times argues, “What do you think of when you picture humans talking to their devices and using voice to command machines? If you are like most of us, you are probably imagining a futuristic Star Trek-like scenario where man-machine interactions occur as if by magic. But the reality is quite different because voice-enabled assistants are already a part of our everyday lives, and while there is a fair bit of technical wizardry needed, none of it involves undertaking voyages to distant planets.

Back on earth, at my home, the voice-enabled Google Assistant has quickly become a familiar presence. Senior Citizens, who can't see too well without his reading glasses, calls out to the Google Assistant on their phone every time he needs to access some information without having to type.”

Children can't seem to get over their curiosity and keep asking the Assistant about astronomy and math, and Food enthusiasts call out to ask for a recipe before making kitchen experiments.

There are fundamentally three ways in which consumers will engage with the Internet using voices.

## Replacing the keyboard by voice commands

Our device of engagement remains the same, our existing laptop or phone. However, instead of using a keyboard to input information, we use voice to input information. And the response (output) can either be displayed on the screen or the response can get called out by the machine. This has an immediate impact on SEO. Google is the gateway to the Internet for any consumer and thus it is important for brands and businesses that they show up in a Google search. However, search using voice is more conversational compared to search using a keyboard Eg: Voice search: Can you recommend a good Italian restaurant in Mumbai in my neighbourhood? Thus SEO strategy will need to be tweaked to include phrases rather than just keywords. Similarly website content will need to be more nuanced and conversational, akin to a chatbot engagement. Traditional websites are organised in the form of the “About Us - Our Services - Contact Us” kind of linear structure. In a voice-enabled connected world, we need to envisage a consumer conversation with a brand website and create an interface that responds to a conversational question, assuming multiple possible paths in which the conversation can go.



## Using voice devices

The second and perhaps more revolutionary use of Voice Assistants is the use of devices for interaction. In the simplest form, these devices will be the likes of a Google Home or an Alexa. The market for these devices is now growing by leaps and bounds. Currently, these devices are being used to find answers to simple questions like “What is the weather,” “Play some instrumental music” and “Which movies are playing in town.” As these devices grow smarter, very soon they will replace the “family dog.” I envisage a voice device at some point becoming a part of the family, and engaging in conversations and providing inputs during a discussion. As per Alexa, every day in the morning, thousands of people get up and say “Good morning” to their device... showing not only how people are making an effort to be polite to a piece of technology, but also the fact that these devices are becoming a part of our lives. Voice devices are allowing brands to create the equivalent of apps that can be fired on the voice assistant. Just like we can create a brand app, and host it on various phone operating systems (like Android or iOS, etc), similarly, we can create brand “apps” and host it on voice assistant platforms. The next media war will be for brands to find space on the consumer’s voice assistant.



## Internet of Things

Perhaps the most significant impact of voice will be seen in IoT devices. With embedded chips in pretty much every device or gadget, which can be then linked to the Internet, one could actually “talk” to any device. So you could ask a light bulb to switch itself on or off, or you can ask your fridge to order supplies via your preferred e-grocery store, or you can ask your washing machine to place a service request with the manufacturer. And then, of course, you could have a driverless car that not only ferries you from one place to another based on your voice command but can have a conversation with you based on your mood, play music of your choice or book a spa for you on your way back from the office if you sound too tired. More and more companies are jumping on this bandwagon.

Already, Ford lets you talk to your car, Huawei and LG lets you talk to your phone and fridge and ADT lets you talk to your burglar alarm! KidsMD, a voice-based application that runs on Alexa, helps provide parents answers to questions about children’s illness and also gets real-time information about drugs, procedures and how to treat their child. Parents find it more reassuring to “hear” the responses than to see the responses displayed on a screen! Boston Hospital is attempting to use voice-based communication in the operation theatre. Doctors in the operation theatre take pictures of body parts during surgery but labelling these pictures later becomes a challenge since the pictures look fairly similar.



Using a voice assistant, the doctor keeps calling out the body parts as he keeps photographing them and the voice assistant does the image tagging. The Internet of Voice is truly the next big revolution, with some incredible possibilities.

04

# Opportunities for Brands



## Voice vs. Text

Let's start with the basic premise of why consumers are willing to choose voice search over text-based queries. One of the most obvious reasons is that it mimics natural behaviour. Unlike picking up a smartphone and typing in a question, talking is a much more instinctual and casual thing to do.

It also means potential communication between a brand and consumer is more intimate, which gives brands a greater opportunity to match a query with a highly relevant and valuable answer.

This also because voice search typically shows greater intent. For example, if a user searches via text using one or a set of keywords – e.g. window cleaner – Google will not be able to decipher whether the user wants a product or service. In contrast, searching via voice naturally prompts the user to flesh out their query to show intent, e.g. “show me window cleaners in my area” or “how to clean windows”.

## Most popular skills are utility-based.

So, what are consumers using voice technology for exactly? According to Google, the majority of users turn to devices like Amazon Echo to multitask. For example, asking Alexa to play music while they're busy doing something else like cooking or cleaning. Another prominent type of user behaviour is to instantly get answers and information – again without the need to use their hands or focus on a single task at one time.

Many brands have responded to this by creating a service or skill that solves a specific need. For example, Domino's Pizza has developed a skill so that customers can order pizza via voice. PayPal has also created one which offers voice-activated payments, and Whirlpool's skill responds to voice requests to adjust settings or processes on cookers and other appliances.



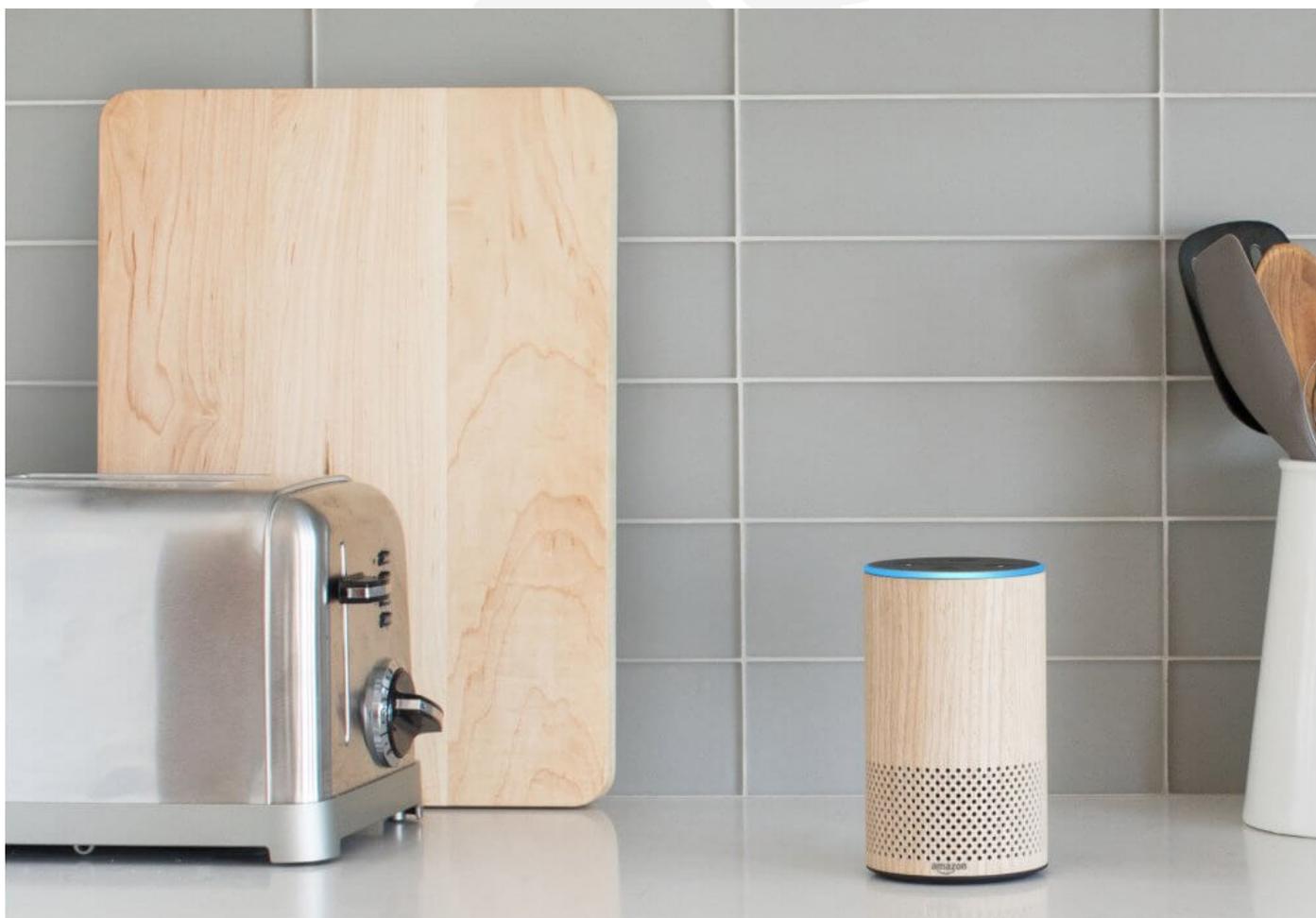
In this sense, the growing role of voice technology in our lives means that traditional search advertising could be challenged. Voice-based recommendations may grow, with consumers only responding to brands that promote their products or services at the right time – i.e. at the point of user-need.

In the US, it's recently been reported that Amazon is in talks with several big brands to deliver this new type of advertising. The result would be brands like P&G or Clorox potentially paying for higher placement on certain products or categories when requested via Alexa, or recommending products based on customer data, e.g. "you bought ..., you might like this".

## Shift to voice commerce.

Alongside what people buy, voice technology looks set to also impact how consumers shop online. This is because – without screens – consumers won't need to use different channels or interfaces to make a purchase. So, instead of apps, websites, and mobile responsive checkouts – brands will focus on creating a single interface so that consumers can do it all in one go, simply by using their voice.

This already exists for Amazon customers, who can order anything via Alexa. The next step could be Amazon suggesting repurchasing products based on data, e.g. calculating that you are about to run out or haven't bought a regular purchase in a while.



## Will it lead to bias?

When you ask Alexa to buy an item, like toothpaste, for example, Amazon responds with two suggestions rather than the long list you would usually get via regular search. Amazon typically chooses products that come under its 'Choice' umbrella, which is determined by many factors including Prime eligibility and customer reviews.

As a result of this, it's been suggested that Amazon could potentially show unfair bias, even deliberately responding with more expensive products.

This hasn't been proven, yet it poses an interesting question about how Amazon's dominance (a reported 70% of the market share) could change the current landscape for brands – where voice performance takes precedence over SEO rankings. Even worse, meaning smaller or lesser-known brands could find it difficult to break through, with Amazon favouring brands or products that are available on its Prime service.

We've already seen Alexa users get preferential treatment on Amazon Prime Day, showing that the brand intends to drive adoption and loyalty to the technology.

## Potential for greater loyalty

It's also been suggested that the growing adoption of voice technology among consumers could mean that we see a 'brandless' future.

In other words, people won't consider the connection they feel with brands when it comes to the products they purchase – only convenience or whether a brand is 'top of mind'.

Regardless of whether or not this comes to fruition, for the time being at least this is likely to give brands greater impetus to create a better customer experience – one that is highly relevant and hyper-personalised.

On the other hand then, in contrast to the brand-less argument, you could suggest that developments in technology will create a level playing field for brands, whereby CX will once and for all overtake other factors such as social media presence or general marketing.



# Build For Voice

By Sapna Chadha

Senior Country Marketing Director, Google India & Southeast Asia

Conversing with technology has always fascinated humans (remember Star Trek!). While this seemed to be science fiction, voice technology has brought this to life. With voice the interactions become more intuitive and human-like thereby becoming easy to adopt for the large segment of users that are new to technology. Infact, India is leading the charge on voice with 82% of all smartphone users using voice activated technology<sup>1</sup>. This is only going to get bigger as 50% of users in India are yet to come online and voice will play a pivotal role in their internet journey.

Voice has democratized technology access and fundamentally changed the way we use our devices. This is especially true for new internet users who lean into voice to help them search online and carry out tasks in their own language. These users prefer voice over typing as the Indic keyboard is complex and voice is 3.7 times faster than typing especially in Indic languages. With 70% of current internet users and 90% of new internet users in India preferring vernacular languages like Hindi, Tamil, Marathi to access the internet, this will be the biggest segment of growth for voice.

With adoption and implementation moving at the speed of sound, the time to build and market for voice is now. Brands have the opportunity to build meaningful experiences for users that allow them to interact in a way that is natural and familiar to them. Here are 4 ways in which voice can help brands can keep PACE with the changing consumer behaviour

**a) Personality:** Voice allows you to add a persona to the brand making the interaction more delightful and human like. A unique personality allows the brand to stand out with a distinct character which is important in absence of visual aid. Traits like trust, confidence, humility which are often difficult to establish via ads, packaging or a social media post are easier to achieve when having a conversation with your consumers. Take for example Tata Motors, one of India's biggest automobile companies, who created a personalized, interactive voice experience for the launch of Tata Altroz. Aimed at attracting new age buyers, Altroz Voice Bot was given a unique helpful and playful personality. Eg: It greets you with "Think of me as your genie but instead of granting wishes, I'll answer any questions you have about me." In addition to enhancing the overall buying experience of users, Altroz voice experience also drove a lot of brand love.

**b) Access:** The ubiquity of voice is what makes it so powerful. Voice has made technology more accessible and equitable for all of India. Users across all age groups are using voice on Mobile and a range of smart devices like Smart TVs, Smart speakers, Wearables, etc. to get their tasks done. Not just that, voice has made access to information simpler and faster for the newly connected 100M users on Jio Phone.

Brands are actively resorting to voice to engage the next set of users. Nippon India Mutual Fund launched a voice based conversational interface and saw 80K downloads in just 180 days. As per Arpanarghya Saha, Chief Digital Officer – Nippon India Mutual Fund, "We view voice-based digital technology as our medium of choice for self serve in driving penetration in Real Bharat and giving people an opportunity for creating wealth and achieving financial prosperity"

**c) Convenience:** One of the main reasons why voice is the preferred medium of access is because it's very convenient. A simple task like playing music which would otherwise involve at least 5 steps (Unlocking the phone -> Searching the app-> Opening the App -> searching for a song-> Playing the song) can now be easily done with just one voice command even without the need to pick up your phone. So, when Gaana integrated voice within its app to attract the next set of users on its app, it saw amazing results. According to Prashanth Agarwal, CEO of Gaana, "Today, 22% (now increased to 25%) of our users overall have started using voice search but if you look at the data for new users, that percentage is much, much higher. It could be because of convenience,"<sup>2</sup>

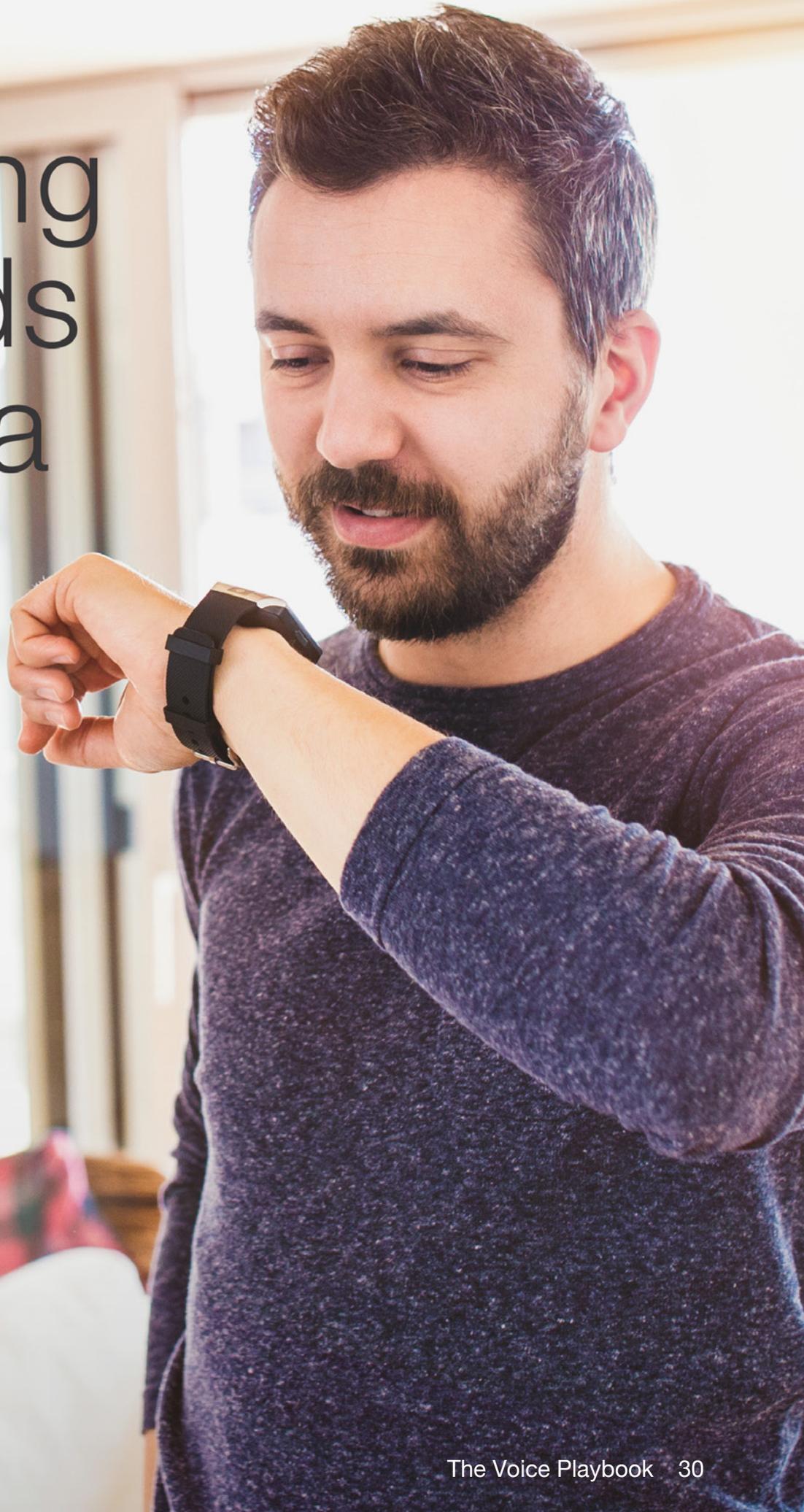
**d) Engagement:** The conversational nature of voice inherently drives engagement since it's a two way dialogue. Through machine learning and conversational AI, voice technology allows brands to interact with consumers like a real person. Testament to this is the fact that queries on Google Assistant are 200 times more conversational than Search. Brands can build experiences leveraging the conversational aspect to drive further engagement.

Flipkart partnered with Google Assistant to create 'Hagglebot'. By analysing haggling strategies and speech patterns, they allowed online shoppers to haggle with Flipkart via Google Assistant. Users had so much fun with it that the average engagement time was over six minutes.

The next set of 500M users coming online will see voice as their preferred mode of accessing technology and I firmly believe voice first experiences will be key for brands to succeed. The 3Vs of engagement (Voice, Video and Vernacular) will continue to be relevant but we will see Voice lead the way for video and vernacular. At Google we firmly believe "Bolne se sab hoga".

05

# Helping Brands have a Voice



# Conversational commerce: creating brand personas for the age of Voice Assistance

Voice assistance is changing how consumers live, search and shop. Brands that embrace the age of assistance have the opportunity to not only unlock hyper engagement but also shape tech and consumer behaviour. Discover how your brand can prep for a voice-first world.

As marketers, it's our job to spot trends and understand what the next big thing is. One trend on the tip of every marketer's tongue is voice assistance. As smart speaker sales soar and billions of people around the world with a smartphone in their pocket, this trend looks like it's here to stay. Just as we moved from desktop-first to mobile-first — we're now witnessing the shift to the voice-first era.

With voice, it's not just about what you say, but also how you say it. While customers don't expect to develop a deep bond with AI (as in the movie *Her*), they do expect a brand's voice to resonate with them. Consumers remember the experience (good or bad) they have with a brand's voice they interact with. The majority of our respondents (86%) said developing a brand's voice personality is extremely important. Leveraging a celebrity voice is one option; in fact, Alexa just got its first celebrity voice in India.

## Voice is the new normal

Voice tech has come on leaps and bounds — encouraging platforms to embrace it and empowering consumers to feel comfortable using it. And with consumers around the world now talking to their phones, TVs, speakers and cars — Voice is quickly becoming the new normal.

Voice is faster and more convenient than typing — especially on mobile when we're on the move and our hands are occupied. People also like to talk because it comes naturally to them. People used keywords when Google Search was first launched and throughout the years our algorithm learned to interpret more conversational terms and queries. But digital assistants represent a cultural and technological shift that goes beyond the question and answer format to interaction.

## Think with Google

People expect to get things done with digital assistants. As we move away from keyword searches to actionable queries, people now expect to get things done, rather than just be served up information. This shift from keywords to interaction means brands will need to redefine their approach to discoverability and think about how they “talk” to consumers.

## The human touch

The term “conversational commerce” was first used in 2015 by Chris Messina, an ex-Uber, ex-Google employee, who predicted that messaging apps would be used to drive online sales more conversationally — in real-time and with real interaction with brands.

Commerce has and always will be conversational. Traditionally, people talked and shared their needs with in-store shopping assistants. Conversational commerce in the era of Voice comes down to delivering this human touch with NLU (Natural Language Understanding).

Engagement in the era of voice means finding the right moments when brands can be helpful and interact with customers when they are on the go. Interaction means that brands are not only telling customers things, they are listening and understanding questions and are ready to assist. Empowered digital assistant users require customised support. So how can businesses prepare themselves for when people begin to “talk” with them and expect interaction? One way is to begin to develop brand personas.

## Creating a brand persona

Personas make us the individuals we are. Shopping in the age of digital assistance is personal and brands will need to create a persona to position themselves.

The first step in creating a persona is understanding the brand. Is the brand funny or serious? Is the brand exciting and friendly or reserved and business-like? Brand style guides can help on the roadmap to creating an authentic persona.

Brands need to consider if their users are anxious and want to get things done right away or if they're in a more relaxed state of mind.

Think about who the user is and their state of mind when they're interacting with the brand. For example, a customer ordering a pizza is very different from a customer looking for a bus schedule. When ordering a pizza people tend to be in a relaxed state of mind so a pizzeria can afford to take a friendlier approach to tone. On the other hand, people looking for a bus schedule are commuters and generally want the information fast and without frills.

Brands need to consider if their users are anxious and want to get things done right away or if they're in a more relaxed state of mind. A brand's persona and tone can alter between verticals, markets, products and the user's state of mind.

The bottom line? Start putting together a creative strategy together to tackle the hard questions and bring a personal touch and human element to your brand's voice.

## Developing a brand persona

Once a brand has established what its voice sounds like, it's time for the developers to create dialogue as natural and engaging as possible. Dialogflow is an end-to-end developer platform that provides NLU, helping brands to interact with customers and create engaging experiences on a personal level.

## Actions on Google

People use Google Assistant to get things done by talking directly with the Assistant. Developers can also use Actions on Google to extend the assistant and implement a "Conversation Action". Users can initiate action by saying a phrase like "Ok Google, talk to Pizza Brothers". This action kicks off the conversation with any given business and provides the user with the opportunity to receive direct assistance from the brand.

As consumers begin to assess brands as people and expect interaction, brands must prepare personas and start to think about how they will engage in a voice-first world.



# Building sonic brands through audio and voice

By Virginia Sharma

Vice President, Brand Solutions, JioSaavn

The incremental growth in digital audio in the past decade is accompanied by the adoption of voice in this decade, making a brand's sonic identity more relevant now than ever, helping it reach consumers when no other medium can. The reason behind this is that digital audio and voice are highly personal mediums that command attention. As consumers crave screen-free time, both these mediums provide an escape by accompanying the consumers through ultra-mobile moments of the day such as cooking, working out, doing household chores, commuting, or even working. The combination of digital audio and voice has given rise to voice-enabled audio advertising, which is the biggest breakthrough in digital advertising, as it allows consumers to engage in a two-way dialogue with brands, while capturing analytics with intent. The future of digital audio and voice advertising is personalized to a consumer's needs, behavior, choice, and consent, and in collaboration with our brand partners, we are excited to achieve new possibilities never witnessed before.

Hey, Google. Good morning

Hey Alexa, play music



An average household looks different now. Voice assistants start the morning with the news highlights & weather updates. This is followed by a music playlist to set the mood for the day, as the coffee brews in the background.

Throughout the day, the voice assistant humors the recipient with jokes and shayaris. From digital natives to the feature phone generation, the mic belongs to everyone, and the world is truly a stage.

This reality is now possible with the advent of voice technology, which is currently witnessing quick adoption by touching multiple dimensions of consumer's daily lives. This growth is primarily driven by ease of usage and low barrier to participation. Voice comes naturally to humans, and unlike other forms of technology, there is no technical skill required to speak to voice assistants. For example, for the millions of users brought online by JioPhones, voice is the favorable search option. Through Google Assistant, the software delivers search results, plays music, and sends text messages — all using voice commands in vernacular languages.

The benefits of voice as a technology transcend industries. Each industry can leverage voice to humanize its existing service or customer experience. In India, consumer-facing businesses as well as the government have started deploying voice-based services to support the internet infrastructure for the next set of digital users. For digital audio platforms, music search is one of the most common commands for voice search across devices. JioSaavn saw a 112% increase in streams on smart speakers in 2020 vs 2019. In 2020, we witnessed an 89% increase year to year in voice searches on Android mobile devices. As voice-activated features become more mainstream among consumers, marketers will have to evolve their content and media to accommodate this new channel.

While many brands do marketing well, there are only a handful of truly customer-obsessed brands that understand that they need to reach consumers where they are, not where you want them to be. It's important for marketers to move beyond thinking about one size fits all digital content, to building content and experiences that are native to the medium chosen by consumers to spend their time. If marketers are trying to reach audiences during their "ultra-mobile" moments i.e. when they are away from their screens and busy working out, cooking, cleaning, working, then standard digital assets like banners and videos don't make sense. They need to build a sonic brand identity communicated through audio and voice experiences. The redefined meaning of a brand's sonic identity involves more than just the production of a jingle, but rather, it involves the process of developing signature audible elements using music, sound, and voice to reinforce a brand's identity across multiple touchpoints. Examples include a brand's interaction sound, creation or collaboration with music and podcasts, or a brand's voice on a smart speaker or audio ad.

Here's how to get started with your sonic branding journey.

## Understand your audience's listening behavior

Understand how your audience's day looks and sounds like. What are they listening to? What time of the day? Which device are they using?

## Conduct a sonic audit of your brand

Analyze the music and sound that your brand has already been using. Use the learnings to reflect on the type of audio your brand would like to associate with in terms of music genre, language, tone of voice on a podcast/show, and mood.

## Develop your sonic content

Start by simply curating or collaborating with existing music and podcasts that your brand identifies with. Then, invest in creating your own audio ads, voice, anthem, interactive sound, and podcast to ensure a consistent voice.

## Amplify your sonic identity

Amplify your sonic identity through your social and video channels to build resonance for your brand's voice.

Look forward to witnessing more brands embracing their sonic identity in the coming decade. The future of branding is sonic, and it's here to stay.



# Why You Need to Make Your Audience Listen Now 2021

By Anjali Krishnan

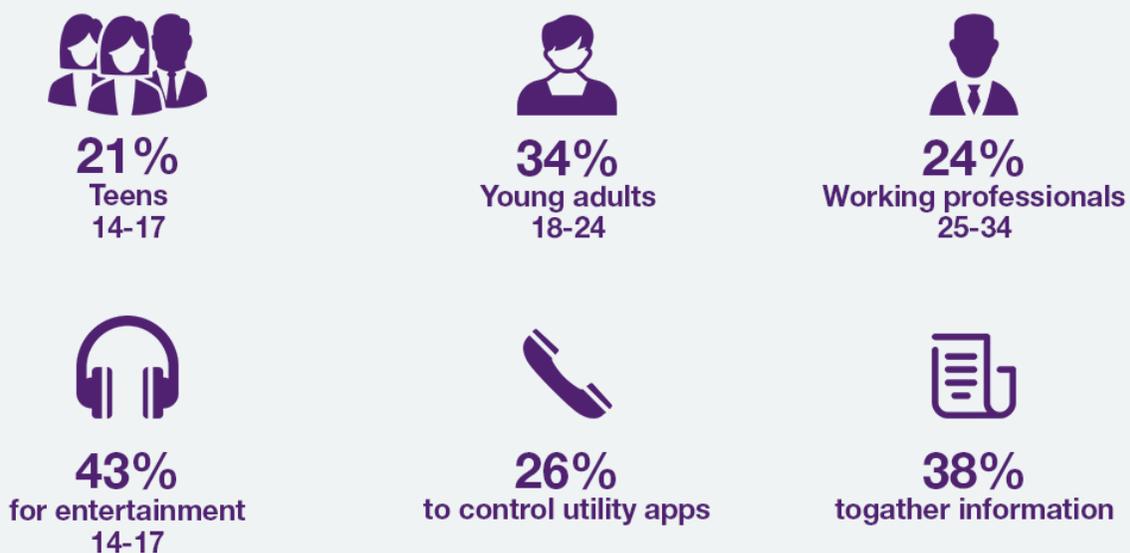
Consumer Experience Lead – India & Bangladesh, Mondelez

Long before the internet pervaded our lives, the most convenient way to keep in touch with friends and family was the good old telephone call. Those who grew up in the 1980's will recall, that making a long distance or “trunk call” required you to book a slot with an operator in advance and you were lucky if you got an evening slot, because the rates were lower. The advantage technology provided in those days was to reach a message or get access to a person using just your voice. Things are no different today, consumers are using voice technology through search, virtual assistants & bots to access a whole host of services. This conversational commerce is rapidly evolving and forcing marketers to adopt voice technology in their marketing plans.

Brands across various categories, have already started integrating voice assistants with their customer service to help customers resolve queries and seek information. AI and ML technologies will help marketers to further enhance consumer experience and drive higher return on investment.

India is a peculiar market, 99% of the 574Mn internet users access the internet via their mobile device. Of the 500Mn smart phone users and 400Mn, one thing is common, the use of voice, because it is device agnostic. Be it voice assistants on smartphones or the use of voice search on smart and feature phones, it is evident that voice is growing slowly and steadily. A Google report suggests that India is amongst the fastest growing voice markets globally, and clearly Hindi on assistant is the 2nd biggest language globally after English, which would explain the surge in searches by 270%, and in Hindi by 400%. Another reason India is embracing voice is because voice is 3.7 times faster compared to typing especially in Indic languages.

For the youth of today, voice has become a way of life, especially for information and entertainment, and here are some of the statistics on the use of voice.



Many brands in CPG, durables, food tech, e-commerce, retail, media, are experimenting with voice. It has also become a means to create consumer engagement and drive buzz. As a marketer, you cannot afford to miss this opportunity.

Form a marketer's perspective there are 3 compelling ways to using voice technology:

1. **Visibility:** Optimize your content to become discoverable by consumers
2. **Variation:** Be versatile in experience and targeting options

Sources: Google – Building for Voice report, Wavemaker & Mondelez International

3. **Vernacular:** Voice commands are being modelled to match languages and accents. Regionalization is an important trend, especially in the sub 30k price range for mobile device users. At Mondelez, we are learning how to use voice by experimenting every day. Here are some examples.

**Immersive experience: Silk Spotify Secret Message. This case study won the MMA Smarties Gold in 2020.**

## Cadbury Silk Chocolate

CPG

### Their Goal

Silk wanted to reassert its leadership position in the premium chocolate market and win over a new generation of consumers. The goal was to make Silk the most preferred chocolate amongst love smitten Gen Zs by elevating specialness of everyday moments.

### Their Solution

Silk has paved a way for celebrating indulgence and stands for the taste of love. What better means than music to express your love! Spotify created a digital experience, which enabled users to send a sweet secret message to their loved one through a playlist. The initials of the songs in each playlist made up the chosen message, making the message sweet yet secret and lent uniqueness to the execution.

### Their Impact

The digital experience saw unprecedented engagement with around 270K users engaging with completion rate of 39%.



**Interactive ads on smart devices: Do Nothing Assistant**

## Cadbury 5 Star Chocolate

### Their Goal

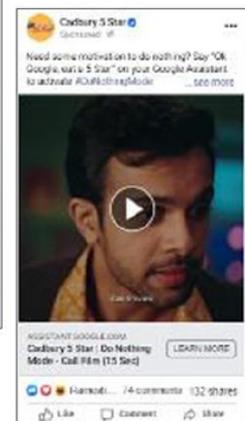
5 Star is a chewy eat that slows you down so that you can enjoy some downtime, unplug from everything and spend time DOING NOTHING. The task was to build the 'Do Nothing' proposition using technology relevant to the youth and create engaging content across digital platforms.

### Their Solution

5 Star – Do nothing assistant with Google. All you had to do is say “Ok Google, Eat 5Star” and your assistant will go into “do nothing mode”. It will neither do any work nor let you work too hard by coming up with fun responses

### Their Impact

3.79 Lac users have experienced the bot in English & 50K users have experienced the Hindi version. 5.2 Mn messages have been sent in English with 751K messages in Hindi version. 551K conversations are in English with 72K in Hindi version. Avg time spent is around 108secs.



**5 Star Do Nothing Assistant started getting pick up by international tech forums & tech influencers**





# Why you need to make your audience listen now?

By MVS Murthy

Head - Marketing, Digital & Corp Comm., Tata Mutual Fund

The best way to tell you why you must listen to your audience is, to start with a chronology. And at the end of it all, one would realise that what goes around comes around. We began with listening to voice and we continue to listen – in a different form, to voice.

The inception of voice as we know happened in the late 1800s. And through the evolution of receivers, antenna, chips, we have evolved on our ability to listen. Lets race down the years.

## 1896.

The year we began to hear. The first edition of radio was patented in 1896 by Guglielmo Marconi. An Italian by birth, he was born in 1874 and was experimenting in wireless telegraphy by following the work of Hertz – the frequency of sound is measured as Hertz.

## 1923.

Radio Broadcasting in India began by the Bombay Presidency Club, broad casting programs. Further on Radio stations were established in Bombay and Calcutta in 1927. Both being port cities saw many a transit of incoming and outgoing supplies. And the gentry needed to listen to something as they went about their day.

## 1929.

Murphy Radio was founded in 1929 by Frank Murphy and E.J. Power as a volume manufacturer of home radio sets. Its factories were based in the Hertfordshire town of Welwyn Garden City, England, starting with fewer than 100 employees. Murphy also had a manufacturing facility in Islandbridge, Dublin, Ireland.

## 1932.

On 1st April, All India Radio was established in India. This was in the thick of India's struggle for Independence, the World Wars

While we may not remember the years our ears, remember events. Here are a few which we “ heard” over the years.

### Run up to Independence Speeches.

Speeches of the founding fathers of our nation, are etched in the collective memory of this nation passed down every decade to the cohort of the next 10 years.

### A Radio and A Baby.

In 1948, Murphy set up shop in India and a few years later they introduced one of the most iconic campaigns starring the Murphy Baby. This brand was a must have brand in every Indian home and had a nice crochet or a cotton cloth on which it sat OR it was covered.

### Entertainment was Voice.

Binaca Geetmala, Fauji Bhaiyon Ke Liye Jaymala, Bhule Bisre Geet, Manchahe Geet, Shastriya Sangeet, Broadcasts by legendary musicians, thinkers and world news all coming “ out of box.”

Kapil Dev's 175\* v/s Zimbabwe in the 1983 Prudential Cup, when India were 9 for 4 as he came into bat, wasn't covered on TV as no one thought it was a “match of any consequence“. Radio covered it. Out of voice emerged the inspiration which made every Indian believe that he/she could do much more than what the world thought of us.

We just breezed through times when devices spoke to us. In the present day, we do all the talking-literally!

### Meanwhile in the Present day.

Mobility of humans has made the world more familiar and more intense too. Familiar because we are seeing so much more and intense because all our interactions affect us. There is an increasing need to exhume over a tweet or an exchange of messages or a post. Device mobility has given us access to personalized devices which are not placed a point of congregation BUT away from group usage.

## Soup – No longer 1 by 2.

With independent devices, the timing, the duration and the frequencies of usage have splintered. The advertisers have to factor that much more coverage. Can't hope that 1 spot will be distributed over a family at the same time.

## Not just hearing, now speaking too.

So far, we have covered Voice as an incoming medium, voice now has become a medium to instruct technology to make a call, play a song, read an article, switch on a light and even “shut-up” – at which point one hears about manners and being polite. The advent and progress of technology particularly consumer tech, has prepared the ground for 2 way voice interactions.

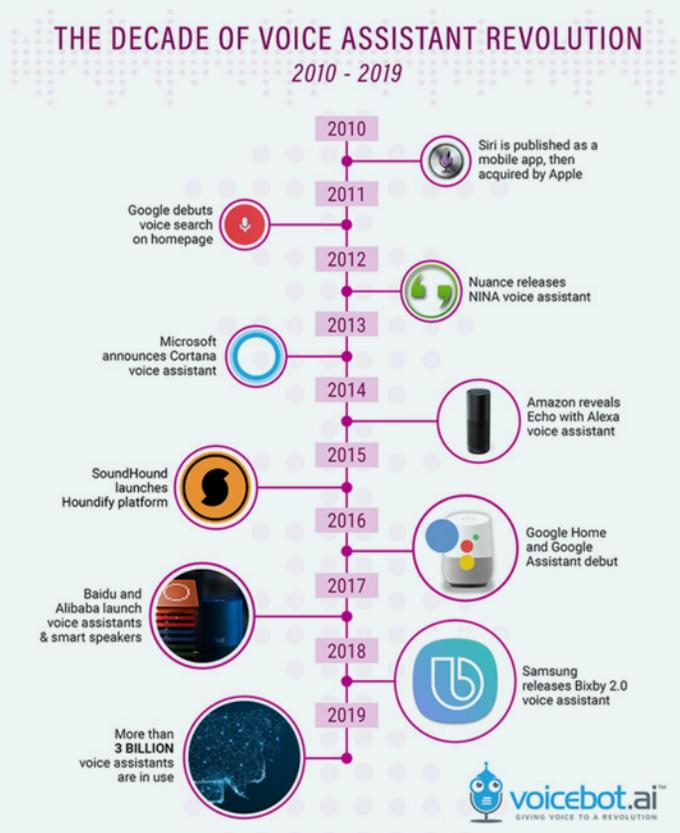
## Seeing Voice in a New Tone.

An oxymoronic header, but, the voice will get clearer as we continue.

The technological march of voice in the Age of The Fourth Industrial Revolution aka Industry 4.0 has been tracked much better. An erstwhile medium of entertainment and information, it has now morphed into a “Jeevesian node“ that you can “talk-to-deliver”.

This chorus grows as we are increasingly storing our lifetimes, successes, agonies, preferences digitally. The other aspect is that we write less and key more. One more ingredient for a rich voice led experience.

With increasing confluence of global influences, families too are speaking in universal languages. Using them to read, write and communicate at school. Which only means that native languages aka mother tongues are being less written, and the reading of the script will reduce.



## VVC - Vernacular + Voice Combo

If they can't read, if they can't write, then let them speak – that's a Brand's last chance! This would hold true when it comes to native languages. And that perhaps could be a starting point for an innovative voice strategy. This will help leading brands touch the farthest audience and then come closer to the natural aficionados. Reminds me of the potato race in school – which one to pick up, the farthest or the closest first. A lot depended on the psyche, in this case the psyche for the brand.

## Listen up – I'm doing the talking here.

A study by PWC, shares how many of us speak into devices.

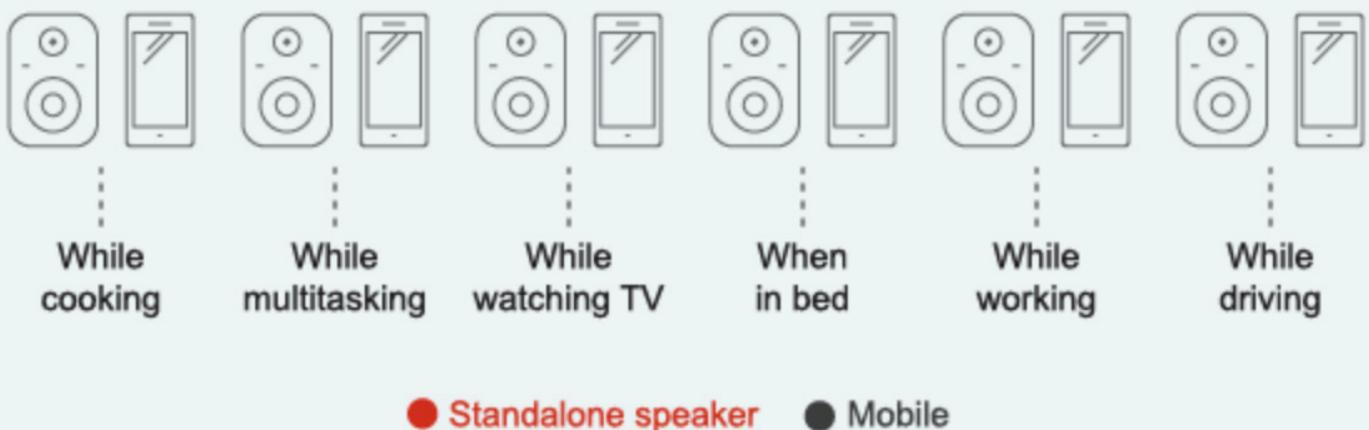


## How does using voice help?

A lot of mundane tasks can move from DIY – do it yourself to DTD – Delegate The Doing. This gives additional spare time to the users. The learning curve is shorter – press a button and talk. It is convenient than typing. The response is nearly on demand.

## Really, how mobile are “mobile” voice assistants?

The image along side shares how voice has become an integral part of a chronology of chores.



Q. Where/in what situations do you use your voice assistant?

Source: PwC Consumer Intelligence Series voice assistants survey, 2018

# Voice assistants influence smart home purchases.

If doing chores was not enough then you can talk them to shop for you too.



**44% of consumers** have used their voice assistant to control another smart device in their home:



## What's the opportunity for Brands?

Firstly, you need to be heard. And secondly, you need to be sought for. “Hey XOXO” will be a common starting point. And just look at where Brands can go journey with their consumers:-

- Across a run
- On a drive
- While cooking a dish
- While waiting for transport

For a society that is distant and increasingly “hedonistically driven”, brands have a great opportunity to occupy a deep personal space and journey with the Consumer. The content can go beyond the 30-sec commercial into becoming a part of the daily routine – either a past time or a time to upgrade. Clearly, the product proposition can morph into a personal proposition. And when it's the latter, the association is that of higher frequency, reach to many more and intensity. So the question to brands is – how can you move from being just an advertiser to creator of content that can be consumed at will and never “unsubscribed to”

## Are you being sought?

If consumers want to talk, and they are seeking to hear information, as a brand are you still on a static web-page? Are you still asking for a call to the call center? Are you still waiting in the retail shelves to be picked up? Can a consumer “hail you “or” hail for you” ?

Not just the organic digital assets but the 3rd party digital ecosystems need to be able to serve your brand when sought. And that will require revamping quite a few of your digital assets. Some simple things one can do right away and en-mass:-

- Allow for text to voice capability on all your digital assets.
- Create BoTs to speak into and allow them to speak back.
- The battle of the search will shift from text to voice – are you ready with content and with strategies to move ahead in your listings.
- And are you populating reviews – where a next generation of first time users could be talking about personal hygiene to the latest phones.

Consider these to be a check-list of items, as we move from talking to each other, talking at each other, just talking while no one listens and talking into a node, which does nothing but listen and deliver. The human touch of a chit-chat may reduce, but a whole world of voices can fill a Consumer's mind-space. Don't lower your voice!

06.

# Brand Voice Content Creation and Discovery



If you can understand how, where, and why your customers use voice, you can find natural connections between your brand and their needs — and provide meaningful assistance. Because voice technology is so new, the key is to harness multiple data sources to get reliable, usable information. This way, you can deliver personalized, tailored, and frictionless experiences when people need them most.

It's also important to push boundaries and think about new ways to use technology. Brands that put a stake in the ground and experiment with how voice can improve people's lives will be ahead of their competitors.

## Think about your competition:

How is your brand uniquely positioned to assist consumers via voice technology?

## Understand your consumers' behavior on voice:

Optimize content for how people use voice. Smart speakers give one answer at a time, so if you're not first, you're last.

## Respond to consumers with answers related to your business:

This includes prompts that are both informational (“What is the best brand of paper towel?”) and action-based (“Order more paper towels.”).

## Ensure digital assistants have accurate, real-time information about consumers:

Powered by artificial intelligence and machine learning, these machines should be fed with multiple data sources so they can gain a complete view of the consumer.

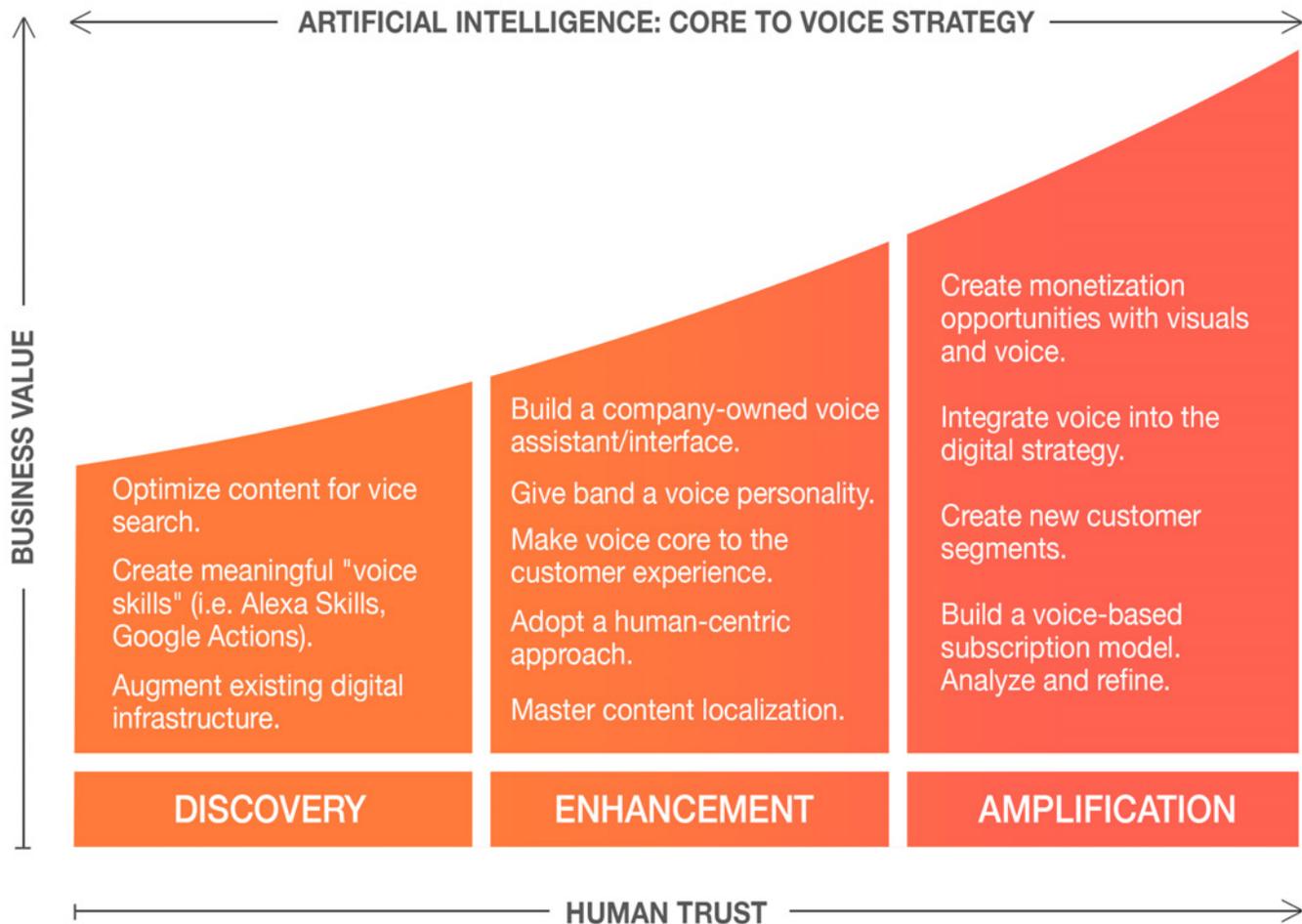
## Build a strategy for the entire customer journey, from discovery to action:

How can your voice app be assistive throughout the entire customer journey and across both explicit and implicit prompts?

## Test and learn:

Keep testing and iterating to ensure your voice strategy is driving real business results. Encourage a culture of experimentation, because that's what will put you ahead of competitors.

# Voice Maturity Model



Response base: 1,400  
 Source: Cognizant Center for the Future of Work Figure 6

Allow us to introduce the three-phased maturity model to help businesses find their brand's voice: discovery, engagement and amplification. A key tenet of our maturity model is that each stage of maturity increases consumer trust, which also serves to increase business value. At the heart of this maturity model are natural language processing, machine learning and other AI technologies that will imbue the voice solution with intelligence and enable it to improve over time. The three stages of the model are:

**Discovery:** Optimize content to be found by voice-based search mechanisms while honing your organization's voice skills.

**Enhancement:** Build voice functionalities and add them to mobile apps, websites and products/services.

**Amplification:** Use voice capabilities as a new revenue stream.

**Discovery:** Get found by third-party voice assistants (and customers). About one billion voice searches are made each month, and nearly half of all searches will be voice-based by this year, with mobile voice searches being three times more likely than text. As smart assistants get even more intelligent, brand visibility will depend on being found by these assistants. That's why 88% of our respondents view third-party voice assistants as critical to their voice strategy, and 91% plan to prioritize voice search not only to ensure customers can find them but also to prevent prospects from finding the competition instead. You either win or you're invisible with voice search.

Here are two action items to take during the "discovery" phase:

**Optimize content** (and infrastructure) for voice search. By this year, 30% of websites will leverage voice search, meaning that users will browse websites and search the internet using voice-first features.

This calls for rethinking existing web content and understanding how it differs from voice-driven content. The old approach of crafting average-quality content and then building backlinks to improve its ranking by search engines won't work with voice. Instead, content with high levels of social engagement tends to perform well in voice search.

Voice content is also more natural-sounding than text-based content. According to Google, 70% of search queries done through voice are casual and conversational vs. the keywords you'd type into a search bar.

There are two immediate challenges for companies to address in this phase: First, fine-tune existing content for voice; humans use different language and phrasing when conducting voice searches. Second, consider the algorithms behind voice assistants and how these will change your content optimization strategy. To win the all-or-nothing game of voice search discovery, your team needs to become familiar with the hundreds of thousands of possible questions, long-tail keywords and queries consumers often make related to your brand. Review your troubleshooting queries to understand consumers' pain points, analyze customer service calls and social media conversations, and collect feedback from sales, marketing and customer service teams on the kinds of conversations they have with customers.

In short, target question-oriented words – such as who, what, when, where, why and how queries – for your product or service. Prepare a comprehensive list of phrases and questions and incorporate them into your website (especially FAQ pages, as these are a preference for voice search) to gain the attention of smart assistants. You can leverage search listening tools, such as Answer the Public, to generate a host of popular keyphrase questions based on broader keywords. Short and simple are key: Amazon recommends that statements scripted for Alexa be manageable in a single breath.

Algorithms favour content optimized to be understandable by a high-schooler for a voice search query. Companies will also have to optimize their digital infrastructure for their brand to be recommended by Alexa or Google Assistant. The average page loads in 4.6 seconds for voice search queries and sites that rank for voice search results load 52% faster than the average page, indicating how critical site speed is for voice search functionality.

## Build meaningful “voice skills” to get discovered by customers

The second part of the discovery phase is about building “voice skills” (i.e., Alexa Skills, Google Actions) that enable customers to discover your brand when they issue a verbal command to their voice assistant (i.e., adding an item to a grocery list). In our study, 60% of respondents plan to build a “voice skill” in the next 12 to 24 months.

Brands first must figure out the role they want to play through a voice skill: create awareness, sell products, provide information, complete transactions, access services, etc. The range of options can be seen through early implementations. OCBC Bank in Singapore offers a voice-based virtual assistant that helps customers check their bank and credit card details and make e-payments via Apple’s Siri and Google Assistant. Starbucks partnered with Alibaba to launch voice ordering and delivery capabilities in China through Alibaba’s voice assistant, Tmall Genie. And Westpac in Australia launched an Alexa Skill for customers to check their accounts and even listen to financial news published

by the bank. The bank is now working on integrating Google Assistant and Apple Siri with its mobile banking offer.

## Create content that you can KISS (keep it simple and straightforward)

While external voice assistants control the content they serve to users, the opposite is true with in-house-built voice-enabled interfaces. Gaining control over content is seen as a compelling idea; in fact, plan to create a content strategy for voice-enabled interfaces in the next 12 to 24 months. We recommend brands consider content optimization and content creation strategies not as silos but as complementary endeavours. Brands can learn and apply best practices from each to elevate their content for voice.

Adopt human-centric design thinking for voice interfaces. To create voice interfaces that consumers can trust, brands have to learn the complex nuances of human communication, particularly the context in which the interaction is occurring. For instance, a doctor’s visit can have multiple contexts, ranging from an annual checkup, to care for a chronic illness, to concern over new symptoms. Brands will need to predefine user personas and scenarios related to their products and services to deliver the desired experiences. Considering the talent shortage challenge that respondents cite, many are partnering with specialized agencies to create prototypes of the product or experience.

Master “content localization” to differentiate your brand. Beyond translating content for local languages, localization involves adapting content to cultural norms and values in specific regions or markets. Kia Motors, the automotive manufacturer, customized its voice interface for India to understand Indian-English accents.

## Make sure that the content matches the way we speak

People will look for answers differently. When they are looking for a recipe through Google, they’ll probably enter “Vanilla pudding recipe”. If they’d be using voice, chances are that they would simply ask: “How do you make vanilla pudding?” This increases long-tail search queries. This means that it’ll become more important to answer the 6 Ws.

## Skip unreadable content like tables

When you make content that’s meant for voice assistants, then you’ll have to avoid certain elements that are hard for them to read. Tables are a prime example of these elements. An easy solution to this problem is to simply summarise the contents of the table in a few bullets.

## Use Schema markup

When the content doesn’t match the way we speak, you can still try to help Google out. By using structured data, you can tell Google exactly what your content is about. Structured data is a standard that allows you to add additional information about a webpage. There are many different ways to do so at your fingertips. For a recipe page, those could be the specific ingredients, the number of calories or how long something has to be in the oven before it’s done.

07

# Brand Voice Consumer Journey



Voice assistants are an enrichment for the customer journey, but when you don't anticipate and think about how you could use them in your customer journey, they could turn into a threat rather quickly. In the end, voice technology should be seen as a new shift in the customer journey, similar to the big shift to mobile from desktop. That's why it's interesting to start thinking about its possibilities for your company early on.

It's important to make sure that the customer is an integral part of the voice parts of the customer journey, considering that this journey is becoming increasingly personal. It has become hard to categorise people, as everyone requires their own, personal set of interactions. This is where voice assistants come into play.

Example Colruyt, where you can simply ask them to order "chocolate spread". Based on your buying habits, it'll pick a brand for you. This means that the device decides which brand you buy. The consumer will become detached from this choice, which means that, as a company, it's incredibly important to discover new ways to integrate this device into your customer journey.

Personal assistants and voice technology give you access to quite a lot of new touchpoints that will prove to be an important addition to the existing customer journey.

Think of chatbots, the possibility for customers to purchase things using only their voice, comparing products on the fly and double-checking product information. People who search through voice are more likely to be looking for something that they need right away. They want an immediate answer to their question or want direct results for their search query. If a user is looking for a restaurant, they'll probably want to go there that same day.

Of course, there are also some difficulties with voice technology. People search differently. When they are looking for a recipe through Google, they'll probably enter "Vanilla pudding recipe". If they'd be using voice, chances are that they would simply ask: "How do you make vanilla pudding?" This increases long-tail search queries.

Google Home plays a big role in these queries. According to the research conducted by ComScore, more than half of the search queries made in 2020 were through voice. Voice is just that much easier than typing. Whenever you ask something that the Google Assistant doesn't know, it'll simply ask Google. You have to make sure that your company knows which questions a user is most likely to ask.

As AI systems and APIs get leveraged together to build adaptive and actionable platforms, the customer journey changes dramatically. Consider this scenario: A bank offers a mobile app that targets customers looking to buy or sell a home. In the app, customers can simply point at the property they are interested in and immediately rich data comes together via APIs to provide historical information on property sales, nearby listings and market trends. Customers can then interact with an AI-powered digital assistant on the app to start the loan application process, including getting lender approval and mortgage rates. All the data captured from the mobile app can then feed the mortgage origination process to reduce errors and provide a fast and superior experience to the customer.

The voice of the customer has taken on a new meaning, thanks to recent advances in voice-enabled technology and artificial intelligence (AI).

Voice AI creates a more natural and conversational experience between humans and machines (smartphones included). The tediousness of opening a browser, typing and scanning search results has been replaced with an assistant that responds to our commands with a welcoming voice, telling us what we need to know. Not only that, but its ability to tap into users' data, browsing behaviours, media histories, and other unique identifiable data points, delivers a more curated and personalized experience, reducing friction with the technology and simplifying the decision-making process for customers. Voice is already changing the way we search. Nowadays, one in four searches is conducted via voice, and this figure is reached 50% in 2020. Roughly 91 million people, or almost 28% of the US population, uses voice assistants at least monthly, with millennials representing the largest group of users (49%), followed by Gen X-ers (35%).

Behind this Voice activity is a complex AI infrastructure that turns voice command into data, which can be used by these devices. Marketers seeking to create meaningful interactions in this environment must first understand how people are 'speaking' to devices, which can be done through keyword research. Qualifying and quantifying this behaviour will lead to new approaches to content strategy and structured data sets that fuel the AI revolution powering voice interaction.

# How To Build A Skill

Voice technology is becoming more prevalent.

As published in Cognizant - From Eyes to Ears: Getting Your Brand Heard in the New Age of 'Voice'.

Voice strategies predominantly fall into two categories, brands can adopt either or both of the approaches, depending on their business objectives and specific use cases:

Building voice capabilities for third-party assistants (Alexa, Siri, Hey Google) to get recognized by them.

Examples include voice search optimization, voice-activating web-based content, and adding a voice capability (an Amazon Skill or a Google Action) to a product or service via an interface to a voice-based assistant. ICICI Prudential Life Insurance in India, for instance, rolled out an AI-powered voicebased chatbot on Google Assistant for customers to execute self-service transactions. Some companies are adopting unconventional approaches:

Last year, Australian grocer Woolworths surprised customers by sending free personal voice assistants along with their grocery deliveries so they can add items to their shopping list via voice.

Creating voice capabilities from the ground up by adding them to existing products and services. Examples include incorporating a voice-based chatbot to answer customer questions or adding a voice capability to an existing product, process or application. For instance, Flipkart, an e-commerce company in India, introduced a multilingual AI voice assistant in its grocery store app to assist customers in buying groceries using their voice.

To combat screen fatigue, voice assistants have entered the market to become a preferred option for quickly retrieving information. A well-repeated stat states that 50% of searches will be done by voice in the year 2020. Also, as adoption rises, it's up to developers to add "Conversational Interfaces" and "Voice Assistants" to their tool belt.

A Conversational Interface (aka CUI) is an interface in a human language. It is tipped to be a more natural interface for the general public than the Graphic User Interface GUI, which front end developers are accustomed to building. A GUI requires humans to learn its specific syntaxes of the interface (think buttons, sliders, and drop-downs).

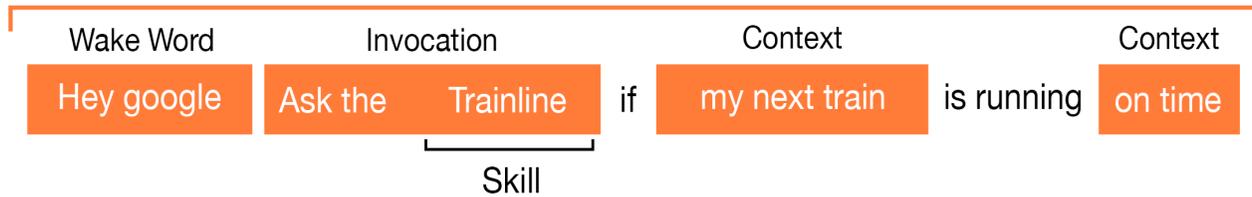
This key difference in using human language makes CUI more natural for people. It requires little knowledge and puts the burden of understanding on the device.

Commonly CUIs come in two guises: Chatbots and Voice Assistants.

Both have seen a massive rise in uptake over the last decade thanks to advances in Natural Language Processing (NLP).

# UNDERSTANDING VOICE JARGON

## Utterance



Keyword	Meaning
Skill/Action	A voice application, which can fulfil a series of intents
Intent	Intended action for the skill to fulfil, what the user wants the skill to do in response to what they say.
Utterance	The sentence a user says or utters.
Wake Word	The word or phrase used to start a voice assistant listening, e.g. 'Hey google', 'Alexa' or 'Hey Siri'
Context	The pieces of contextual information within an utterance, that helps the skill fulfil an intent, e.g. 'today', 'now', 'when I get home'.

First off, every platform has a different name for their 'Voice Experience', Amazon goes with skills, which I will be sticking with as a universally understood term. Google opts for 'Actions', and Samsung goes for 'capsules'.

Each platform has its own baked-in skills, like asking the time, weather and sports games. Developer-made (third-party) skills can be invoked with a specific phrase, or, if the platform likes it, can be implicitly invoked, without a key phrase.

Explicit Invocation: "Hey Google, Talk to <app name>."

It is explicitly stated which action is being asked for:

Implicit Invocation: "Hey Google, what is the weather like today?"

It is implied by the context of the request what service the user wants.

In the western market, voice assistants are very much a three-horse race. Apple, Google and Amazon have very different approaches to their assistants, and as such, appeal to different types of developers and customers.



### Apple's Siri

Device Name: "Home Pod"

Wake Phrase: "Hey Siri"

Siri has over 375 million active users, but for the sake of brevity, I am not going into too much detail for Siri. While it may be globally well adopted, and baked into most Apple devices, it requires developers to already have an app on one of Apple's platforms and is written in Swift (whereas the others can be written in everyone's favourite: Javascript). Unless you are an app developer who wants to expand their app's offering, you can currently skip past Apple until they open up their platform.



## Google Assistant

Device Names:  
"Google Home, Nest"

Wake Phrase: "Hey Google"

Google has the most devices of the big three, with over 1 Billion worldwide, this is mostly due to the mass of Android devices that have Google Assistant baked in, with regards to their dedicated smart speakers, the numbers are a little smaller. Google's overall mission with its assistant is to delight users, and they have always been very good at providing light and intuitive interfaces.

Their primary aim on the platform is to use time — with the idea of becoming a regular part of customers' daily routine. As such, they primarily focus on utility, family fun, and delightful experiences.

Skills built for Google are best when they are engagement pieces and games, focusing primarily on family-friendly fun. Their recent addition of canvas for games is a testament to this approach. The Google platform is much stricter for submissions of skills, and as such, their directory is a lot smaller.



## Amazon Alexa

Device Names: "Amazon Fire, Amazon Echo"

Wake Phrase: "Alexa"

Amazon has surpassed 100 million devices in 2019, this predominantly comes from sales of their smart speakers and smart displays, as well as their 'fire' range of tablets and streaming devices.

Skills built for Amazon tend to be aimed at skill purchasing. If you are looking for a platform to expand your e-commerce/service, or offer a subscription then Amazon is for you. That being said, ISP isn't a requirement for Alexa Skills, they support all sorts of uses, and are much more open to submissions.

## The Others

There are even more Voice assistants out there, such as Samsung's Bixby, Microsoft's Cortana, and the popular open-source voice assistant Mycroft. All three have a reasonable following, but are still in the minority compared to the three Goliaths of Amazon, Google and Apple.

## Building On Amazon Alexa

Amazon's Ecosystem for voice has evolved to allow developers to build all of their skills within the Alexa console, so as a simple example, I am going to use its built-in features.



Working on Amazon is relatively simple, as they allow you to create all parts of your skill within the Alexa Developer Console. The flexibility is there to use AWS or an HTTPS endpoint, but for simple skills, running everything within the Dev console should be sufficient.

## Let's Build A Simple Alexa Skill

Head over to the Amazon [Alexa console](#), create an account if you don't have one, and log in, Click Create Skill then give it a name, Choose custom as your model, and choose Alexa-Hosted (Node.js) for your backend resource.

Once it is done provisioning, you will have a basic Alexa skill, It will have your intent built for you, and some back end code to get you started.

If you click on the HelloWorldIntent in your Intents, you will see some sample utterances already set up for you, let's add a new one at the top. Our skill is called hello world, so add Hello World as a sample utterance. The idea is to capture anything the user might say to trigger this intent. This could be "Hi World", "Howdy World", and so on.

## Third-Party Voice Builders

Much like the app industry, as voice gains traction, 3rd party tools start popping up in an attempt to alleviate the load on developers, allowing them to build once deploy twice.

Jovo and Voiceflow are currently the two most popular, especially since PullString's acquisition by Apple. Each platform offers a different level of abstraction, so it just depends on how simplified you're like your interface.

## Extending Your Skill

Now that you have gotten your head around building a basic 'Hello World' skill, there are bells and whistles aplenty that can be added to your skill. These are the cherry on top of the cake of Voice Assistants and will give your users a lot of extra value, leading to repeat custom, and potential commercial opportunity.

## In-skill purchases

In-skill purchases (or ISP) are similar to the concept of in-app purchases. Skills tend to be free, but some allow for the purchase of 'premium' content/subscriptions within the app, these can enhance the experience for a user, unlock new levels on games, or allow access to paying walled content.

## Multimodal

Multimodal responses cover so much more than voice, this is where voice assistants can really shine with complementary visuals on devices that support them. The definition of multimodal experiences is much broader and essentially means multiple inputs (Keyboard, Mouse, Touchscreen, Voice, and so on.)

Multimodal skills are intended to complement the core voice experience, providing extra complementary information to boost the UX. When building a multimodal experience, remember that voice is the primary carrier of information. Many devices don't have a screen, so your skill still needs to work without one, so make sure to test with multiple device types; either for real or in the simulator.

## Multilingual

Multilingual skills are skills that work in multiple languages and open up your skills to multiple markets.

The complexity of making your skill multilingual is down to how dynamic your responses are. Skills with relatively static responses, e.g. returning the same phrase every time, or only using a small bucket of phrases, are much easier to make multilingual than sprawling dynamic skills.

The trick with multilingual is to have a trustworthy translation partner, whether that is through an agency or a translator on Fiverr. You need to be able to trust the translations provided, especially if you don't understand the language being translated into. Google translate will not cut the mustard here!



# How Voice technology is changing consumer experiences

By **Sreeraman Thiagarajan**

CEO, Agrahyah Technologies, India's first voice agency.

Will AI take our jobs? I don't know yet, but what it is certainly doing right now, albeit as voice assistants is reduce our efforts to get things done. From six to sixty, voice assistant such as Alexa and Google Assistants are helping us find information, order or track products, book a cab, pay bills, or just have fun with streaming music and podcasts.

Here are some ways in which voice is changing consumer experience for good.

## Voice is mobile first:

Per Google, 60% of all Android users in India use Google Assistant on their phones; this significant user base hints that voice assistant have made in-road into our behaviour and here to stay. Beyond smartphones, voice assistants work on feature phones too, this opens up an entire new audience such as the 100 million plus Jio phone users.

## Voice is form agnostic:

Automakers are steadily integrating voice assistants in cars to help drivers focus on driving while getting directions or controlling the car functions with just their voice. Appliances such as TV, a/c and more have voice assistants in them, paving the way for lot intuitive and convenient way of operating them.

## Voice helps in automation:

With Alexa, you can set routines, which means you can use AI to wake you up in style or simply turn your living rooms lights to suite your mood basis the time of the day. The entire edifice of smart homes today are built on the foundation of voice assistants. With RPA, voice assistants are also helping B2B players achieve better efficiency from manufacturing to knowledge industry through automation.

## Voice is inclusive:

Much has been written about the next billion users, who prefer to be served in their languages, and voice assistants, which works across nine Indian languages, are an epitome of digital inclusion and accessibility. It breaks both linguistic and literacy barriers and drives more people to use technology in a simple, natural form.

## Voice is convenience:

Voice lets you us do things hands free, your experiments in kitchen can be a lot less messy with real time or step by step recipe instructions from your favourite smart speaker on the sink. Multi task much? help is available with your AI powered voice assistant as a concierge at home, work or anywhere in between!

## Voice is intuitive:

As humans, we learn to speak even before we learn to walk, that's how natural is voice. Today, with applied AI, voice assistant are extremely intuitive for anyone to start using it. Anecdotally, I've seen children as young as 2 years intuitively use Alexa and have a meaningful conversation. Voice assistants, unlike rule based chatbots, are intent driven and can easily adopt to a wide variety of human utterances, making it the most intuitive UI to access technology.

## Voice is on-demand:

77% of mobile applications are abandoned after a single use, as alarmingly it is, the reason for this, among many is the fight for real estate on our phones. Voice applications aka Alexa Skills or Actions on Google doesn't not need any download or installation, they occupy no space on our devices, you simply enable them, and invoke them as you go. This makes voice more compelling for developers to serve their users.

A voice first world is looming upon us, as it is growing out of nascency, we will witness more adoptions from both brands, developers, and consumers, giving rise to innovations, and novel use cases that will be only limited by our imagination.



# Voice technology is changing Consumer Experiences: Is your brand a Trend Setter or Trend Follower?

By Kumar Rangarajan

Co-founder & Obsessive Dictator, Slang Labs

Voice Technology today is at the same point of evolution and adoption as Mobile Technology was 10 years ago. The most common questions that Brands, Marketers and Product Managers were asking themselves back then were :

1. Is mobile really important to us? What doors can it open for us?
2. Will our customers really use mobile to engage with us?
3. What does a good mobile experience look like for consumers?
4. What is the best way to build consumer experiences using mobile?
5. Is there an “ROI” for adding mobile now? Or can we wait?

Now, as a marketer or a brand owner, do you have concrete answers to all the above questions with the paradigm changed from mobile to voice?

## 1. Is voice really important to us? What doors can it open for us?

The Great Indian Consumer Story has expanded to include two new segments that are both aspirational of the same conveniences and empowered with the same internet and smartphone access:

1. **400 million smartphone users in the tier-2, 3 regions of India** who are not comfortable with English spellings and prefer vernacular languages.
2. **100+ million elderly population (even in urban areas) who are not comfortable with technology** the same way that their children are. They have money and time to spend on digital and consumer experiences, OR in many cases they just need tech to maintain their health and wellness.

## 2. Will our customers really use voice to engage with us?

According to the recently published Unicommerce Ecommerce Research Report, 67% of the new demand for Ecommerce Platforms came from the Tier-2, 3 regions. Google says 28% of its searches are now happening by voice. Amazon and Flipkart saw a massive surge in voice usage during their festive sales in 2020! So, we see that:

- (i) the next biggest customer base is from currently the underserved segments
- (ii) Voice is fast catching on as a preferred interface for consumers

## 3. What does a good voice experience look like for consumers?

Voice interface design brings its own set of challenges to brands when they build consumer experiences for apps and smart speakers. In Slang's 3+ years of experience, we have solved many of them through consistent user research and testing. For example, a multimodal interface works best compared to voice-only experiences. Visual cues and prompts enable new users to onboard voice interfaces more easily. Escalating prompts i.e. prompts that change each time the same command or error is repeated, ensures that users don't get disengaged from the app by repetitiveness. And so on.

## 4. What is the best way to build a consumer experience using voice?

Most brands will have to answer the following questions to get their Voice Strategy right and assure a great consumer experience using voice:

1. How to choose the right voice use cases?
  - a. High rate of repetitiveness and tedious actions
  - b. Frequently performed actions on apps which can be faster using voice
  - c. High count of clicks and swipes needed to accomplish common app actions
2. What is the brand experience for consumers after adding voice?

While most brands would be enticed to be on the “big tech platforms” such as Alexa, Google Assistant, or Siri, they are - broad based and generic which limits the customization uniqueness of brand experiences that you can offer to your consumers. As an innovative and agile brand, you would want to move fast and deliver a branded experience of voice for your consumers which is possible only when you implement voice inside your apps. It's like Wiki Page v/s Website.

3. How can brands quickly evolve from experiments to delivering mainstream voice experiences, i.e. how can you scale the voice experiences quickly?

In new technologies, brands need to experiment quickly and evaluate the value it provides with rapid iterations. So, choose voice technology solutions that allow you to run a pilot or a custom experiment with the least amount of time, engineering effort and money. This assures quick learning to evolve the best voice strategy for your brand that can be scaled faster than your industry peers.

## 5. Is there an ROI in building for voice? Or can we just wait?

Innovation and experimentation can rarely promise assured ROI to brands. While there have been several studies and reports that prove the value of adding voice, it ultimately boils down to the brand persona - whether it wants to be at the leading edge of innovation or play safe and wait for others to evolve mature solutions. Either way, there is nothing really stopping brands from running their own pilots and experiments!

## About Slang Labs

Slang CONVA is the easiest and fastest way to add sophisticated, multilingual Voice Assistants to your existing e-commerce mobile and web apps. Imagine adding an Alexa-like Voice Assistant inside your apps but customized for your domain and business.

### Join the #VoiceRevolution.

By signing up for a free account at <https://www.slanglabs.in>.

08

# Voice Marketing & Monetization



While the Alexa Skill Store boasts more than 100,000 voice apps, many are seldom or never used. When new functionality is rolled out, it's essential to let both consumers and employees know about it.

Building a voice skill is not a case of – make it and they will come. Building great functionality is only half the battle – the other half is making sure people know about it. While the Alexa Skill Store boasts more than 100,000 voice apps, many are seldom or never used. When new functionality is rolled out, it's essential to let both consumers and employees know about it. Coca-Cola tapped Amazon Alexa Skill to personalize the Coke experience for consumers in Australia. As part of the company's brand campaign – Share a Coke, consumers could have a free personalized Coke delivered to them via voice command.

As the adoption of voice assistants and voice-enabled speakers continues to grow, voice AI agents will have a greater role in mediating (or disintermediating) customers' interactions with brands. When compared to paid search, voice-enabled devices typically provide a single response to most queries. This is because their goal is to surface the most relevant content for the user and simplify the dialogue to accomplish tasks. However, on desktop and mobile, advertisers were satisfied with landing among the first couple of pages of search results, with voice, they will have to compete for the top slot (or top three at most, since users are unlikely to listen to more than a few results through voice assistants).

Despite Amazon and Google's current focus on providing a great user experience, it's not hard to imagine that voice-commerce is where they'll go next. Some search professionals are already anticipating the emergence of voice ad-exchanges, where advertisers will bid to get their brands to the top spot. The first execution of this solution has just hit the market: *Instreamatic.ai* is the first company to serve '*voice ads that people can speak with*'. In addition to competing for the top voice slot, marketers should realize that in this new voice-enabled ecosystem, access to customer data generated through third-party devices will most likely be owned by the voice-AI makers—which, coincidentally, are also the major advertising walled gardens (we could very well be witnessing the early stages of future sound/voice-walled gardens).

**Amplification:** Creating voice opportunities to monetize your brand.

We're in the early days of reaping revenues through Voice. The possibilities will only become more apparent as the technology matures and users' confidence in Voice grows. Rather than serving as one of the channels for brands to monetize, Voice is an enabler to influence the purchase journey for consumers, and a path for brands to rise above the noise in the market.

When voice monetization comes into full play, only brands that are voice-activated will partake. Early movers are already monetizing with this technology. Reliance Nippon Life Asset Management is leveraging voice to market mutual fund products across India. The company plans to add 10 new customers for every 100 people with the voice interface and expects 40% of its customers to invest through voice, over the next two to three years. The insurer has defined a broader framework and roadmap for voice deployment across its digital assets. Companies that plan to undertake any new digital initiative, are making sure that voice is integral to it.

Here are some recommended actions companies can take to expand upon what they've built to influence consumers:

## Add visuals to amplify voice engagement with users.

Would you buy a new dress without being able to see it? With on-screen displays providing additional context, consumers will be better able to engage with brands. With Echo Show, the addition of Alexa to televisions, and Google Home with Chromecast, experiences will increasingly become voice-driven and visually-immersive. Andrew Ng, then chief scientist at Baidu, explained to MIT Technology Review that while speech input is three times quicker than typing on mobile devices, "the fastest way for a machine to get information to you is via a screen. Marrying the two will lead to more effective engagement and ultimately better conversion."

## Tap new customer segments.

Millions of vision-impaired people, people with intellectual disabilities, and people from culturally and linguistically diverse backgrounds find it challenging to access business and government services online. Voice interfaces strip away those barriers and enable these users to tap into mainstream. By becoming an inclusive brand, businesses can grow their family with millions of new consumers, waiting to experience the online world through voice.

## Build a voice-based subscription model.

In our earlier research “Algorithms Over Brands,” consumers are comfortable with the idea of voice-based personal assistants and smart products automatically ordering, buying and paying on their behalf. Instead of occasionally buying one-off products online, people may switch to automatic subscriptions, which could have tremendous implications for businesses. Consider building your subscription-based model, perhaps by partnering with brands offering products or services complementary to your own. For instance, automakers can consider partnering with gas stations and restaurants to promote them in voice search results.

## Analyze, analyze, analyze.

A successful voice-first strategy requires continuous iterations based on how customers are using your newly enhanced products and services. You need to analyze user data, engagement points and friction points, and identify areas of improvement to continue to grow consumer trust. With Adobe Analytics, companies can analyze voice data for all major platforms, including Amazon Alexa, Apple Siri, Google Assistant, Microsoft Cortana and Samsung Bixby.

09

# Challenges Faced by Voice Assistants



Yes, voice technology has problems. Call them challenges or call them opportunities that one can tap into.

## Privacy

Privacy is a huge concern, especially when it comes to smart speakers. They always listen for their wake word, posing a huge privacy concern.

The crucial detail that is often missed out is the difference between listening and recording. Once these speakers or voice assistants get activated using the wake word, they start recording the audio.

These audio clips are sent to Google or Amazon. These tech giants have exposed these audio recordings to humans, albeit in an anonymised manner yet, a significant infringement on privacy. There have already been numerous cases where such recordings have led to privacy issues.

## Accuracy

Voice Assistants don't always understand what's spoken. There could be many reasons behind these – sometimes it could be because of our accent, sometimes it could be because the voice assistant doesn't have any instruction related to your query.

## Lack of Vernacular Support



Speech recognition, perhaps the most critical component of a Voice Assistant, is not available for a lot of languages spoken around the world. The problem is not only limited to speech recognition but also extends to other critical functional areas.

Countries like India, with a massive Indic speaking population and lack of quality ASR model for vernacular languages, are often a limiting factor in providing a good experience. In India, in the coming times, voice assistants will not be a source of convenience but a necessity.

10

# Early Adopters & Future Predictions



Some first-mover advertisers have already begun incorporating voice and artificial intelligence into their products and services to outpace the competition.

## Auto

In 2017, Nissan announced that they are working with Microsoft and its Connected Vehicle Platform, to integrate Cortana into some Nissan models. Cortana will adapt preferences and features based on drivers and passengers on board.

For example, through the calendar integration in Cortana, the driver could ask about his or her schedule for guidance on where to go next and get suggestions on shortcuts to their destination.

In addition to Cortana, Nissan also announced that Alexa will be able to lightly operate some Nissan models (turning the engine on/off, operating locks and horn, etc.).

## Travel & Hospitality

In partnership with IBM, Hilton piloted Connie, the first intelligent robot concierge in the hospitality industry. Connie is powered by Watson, IBM's AI supercomputer, and she works side-by-side with Hilton's guest services, to help with visitor requests, personalize guest experiences, and support travellers with additional information to plan their trips.

Connie uses a combination of technologies including Watson APIs (Dialog, Speech to Text, Text to Speech, and Natural Language Classifier), and a partnership with WayBlazer (which has extensive travel domain knowledge) to interact with hotel guests and address their travel needs. Hilton's goal is to deepen customer and brand engagement through innovative and more personalized experiences.

## Retail

Walmart and Target joined forces with Google to compete against Amazon's Alexa-enabled shopping services. Walmart will be offering hundreds of thousands of items for voice shopping through Google Assistant. Through the personalization of the partnership, customers will be able to order generic items like cheese or pasta, and Google Assistant will know which brands and size the user prefers.

This year, Target will give users the option to link their Target.com accounts to Google, for similar personalization features (as Walmart). Google Express or Uber will take care of the delivery.

## CPG

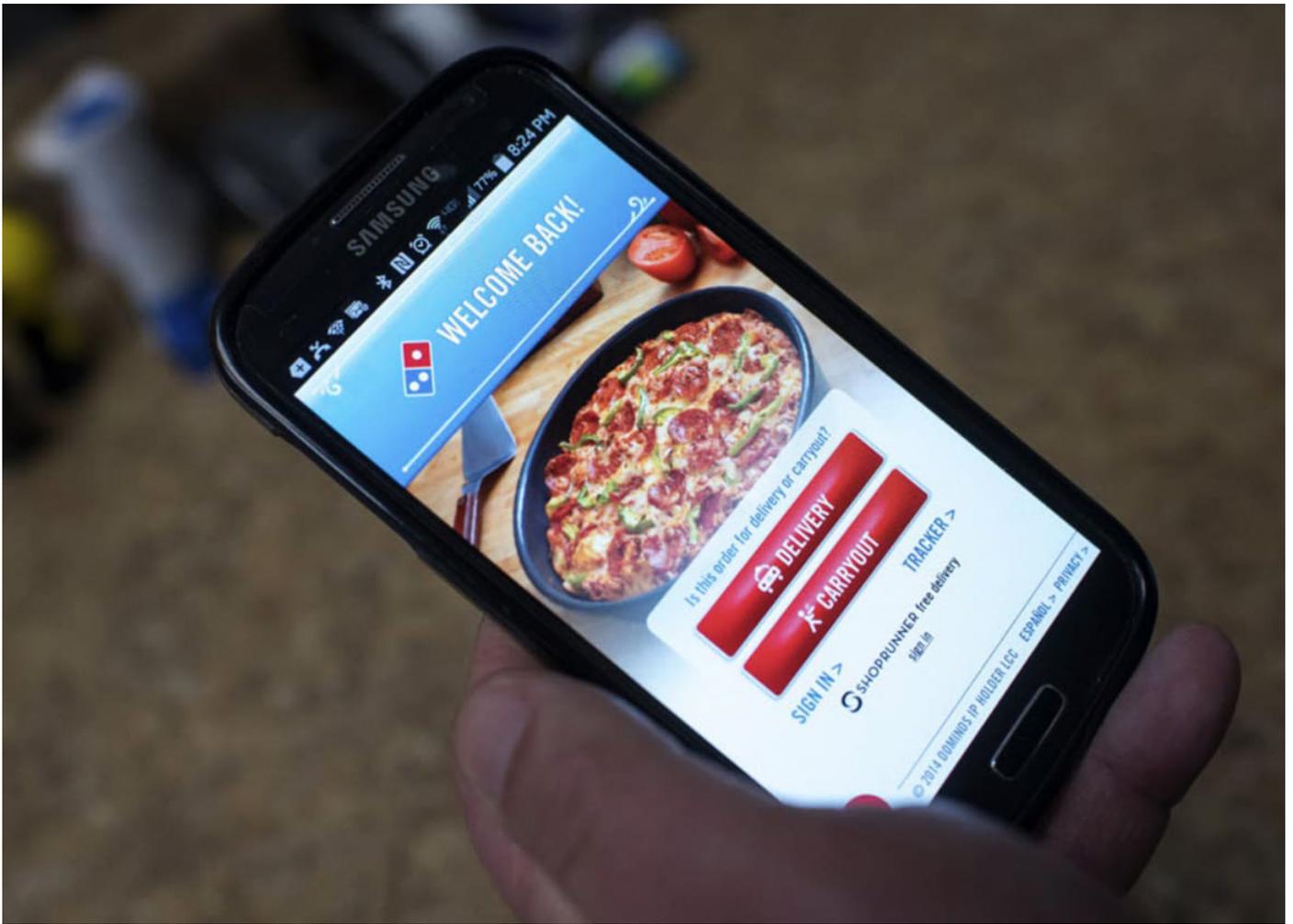
The fast-food giant McDonald's partnered with Microsoft to develop an app that takes advantage of MS cognitive technology to convert drive-through orders into text, and send it directly into an integrated POS system for faster processing and even faster drive-through meal delivery.

## Finance

Capital One developed an Alexa skill that allows customers to check their credit card balance or make payments when due. The skill has the necessary safeguards in place: it performs security checks and requires customers to sign in using a username and password. Once the skill is open, users must provide a four-digit code to confirm their identity. The only caution for users is to make sure no one overhears their Personal Key, otherwise, they'll be able to access their banking or credit card info through Alexa as well.

The new voice-activated era is driving more brands to launch innovative marketing campaigns, with some reaping more success than others. We take a look at 5 brands, which are leveraging voice-activation to boost engagement and drive customer experience.

## 1. Dominos' voice-activated pizza order app



In March this year, the pizza chain rolled out a new Siri-style 'voice ordering' system developed by speech recognition firm, Nuance. The software sits alongside Domino's virtual assistant 'the Dru Assist', and claims to make ordering more efficient and accurate for customers.

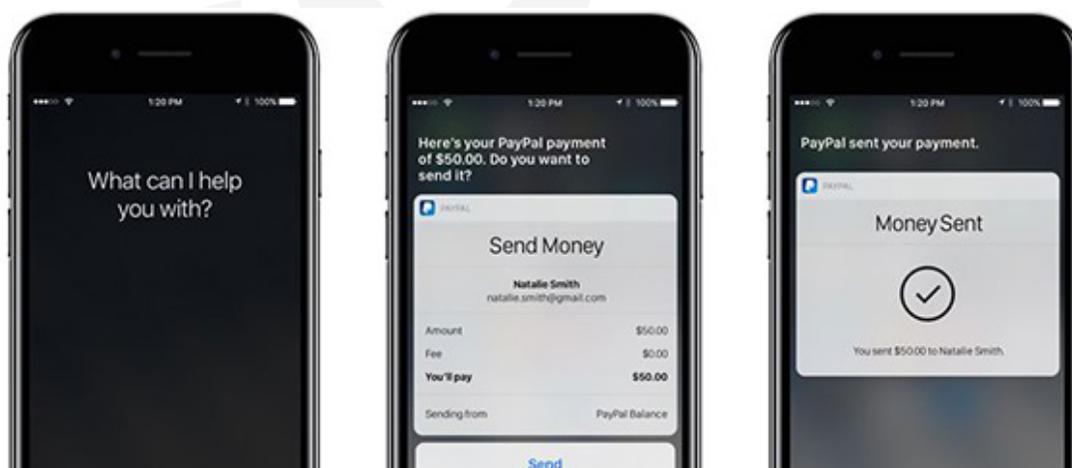
"Those who are ready for the new voice activated era, like Domino's, will have a competitive advantage," Dale Beamont, founder of AI-powered business app, BRiN, said. "They saw the future early and have already built their digital assistant."

## 2. Whirlpool's voice-activated home appliances

Earlier this year, Whirlpool announced a new collaboration with Amazon's Alexa that will see home appliances operate by voice control. Appliances will be designed to respond to voice requests for tasks like pausing and starting a load of laundry, asking for the time remaining on a wash cycle, adjusting the cooking mode on a smart oven, and turning on maximum cool settings for refrigerators among other commands.



## 3. Paypal's voice-authorized payment transactions



Last year, PayPal announced an update on its app, for iPhone and iPad, to support new payment transactions via Siri, allowing users to send and request money in 30 countries around the world, with voice-enabled command. With a simple voice command like 'send \$50 to my sister using PayPal', Siri connects with the PayPal service and pulls up a custom sheet with details of your transaction before you authorize it.

## 5. Burger King

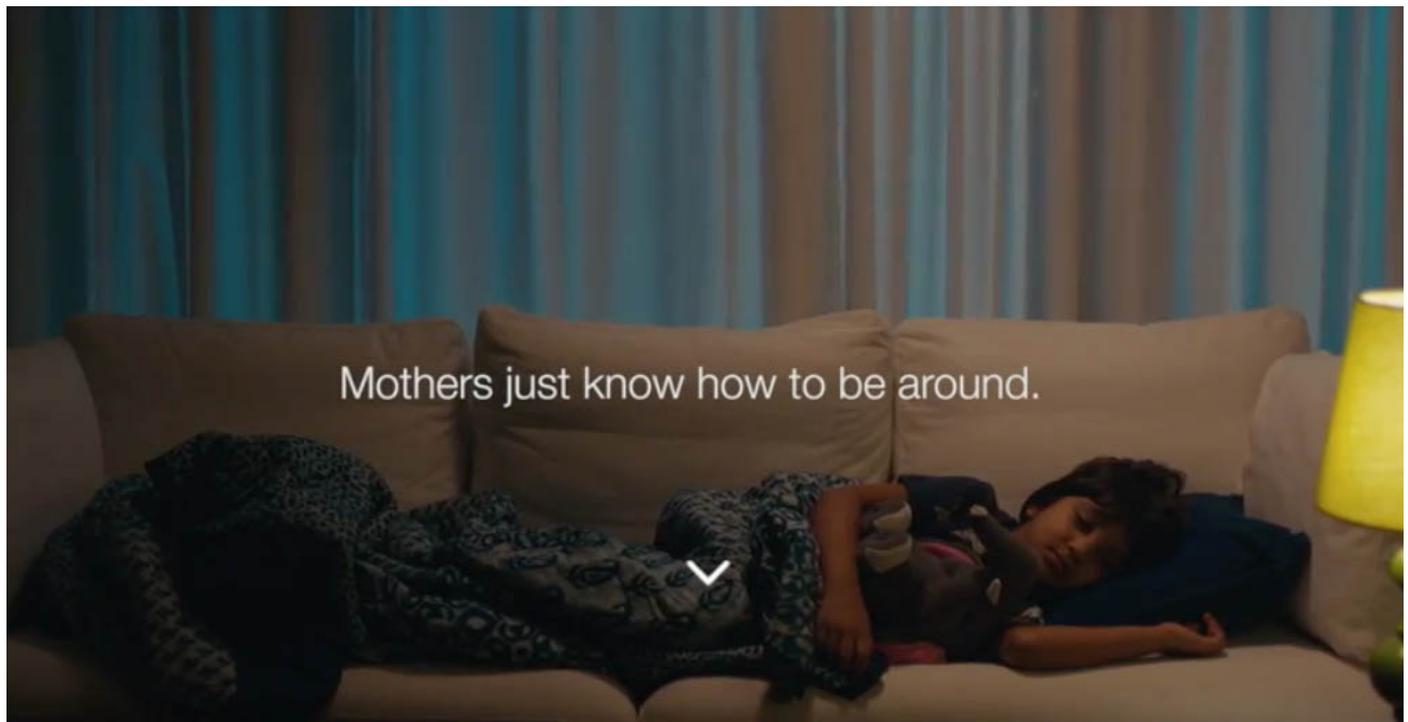


In April, Burger King created headlines in the US when its voice-activated ad campaign on Google Home was blocked and its functionality shut down by Google. When asking Google Home ‘what is a Whopper’, the device answers using the information provided on the brand’s Wikipedia page, which was edited to say:

“The Whopper is a burger, consisting of a flame-grilled patty made with 100% beef with no preservatives or fillers, topped with sliced tomatoes, onions, lettuce, pickles, ketchup, and mayonnaise, served on a sesame seed bun.”

“Burger King capitalised on Google Home devices through a TV ad by prompting the phrase ‘OK Google, what is the Whopper burger?’ which set off home devices and drove organic online social activity at a ridiculous scale,” Hayward said.

## 6. Godrej Security Solutions - India's First Voice Enabled Mobile Banner



Isobar has collaborated with Godrej Security Solutions (GSS) to launch India's first Voice-Enabled Mobile Banner. Isobar's core idea was to enhance and capture the bond between the mother's voice and her kid's reaction in an engaging, yet relatable manner. The agency devised a digital media campaign for GSS that leveraged the mother's lullaby in the form of a 'Voice Driven Banner' ad, which was executed for the first time on a mobile device.

Isobar India planted this interactive banner on relevant parenting and youth centric mobile apps and mobile websites, asking users to help the little girl go to bed. Via the banner, users were asked to say 'Mummy' into their devices, to make her mom appear and sing a lullaby to console her and put her to bed.

Within a span of just 24 hours, this banner-led campaign – through its high visual appeal, doubled the average industry engagement of 2% and resulted in over 1,200 submissions in the best moments contest.

## 7. Forevermark - India's first ever user generated content led Voice Mobile banner



Isobar India has partnered with Forevermark Diamonds to launch India's first User Generated Content led Voice Mobile Banner. The collaboration stands as a testimony to India's rising voice-based interactions, growing at a rate of 270% year-on-year, as reported by Google & Amazon Alexa. For this festive season, Forevermark has launched the 'Half Carat Diamond' campaign under the theme – 'The Better Half Within Me'. The film portrays women protagonists pursuing their dreams and passions.

Hence through this campaign, the brand intends to give its users a unique platform to share their hobbies and talents through an immersive experience. To initiate the campaign, Isobar created an interactive banner across relevant apps used by women that focus on areas pertaining to cooking, fitness, beauty and lifestyle, amongst others; and to engage them with the banner, women were asked to speak about their passion into their mobile microphones. This led them to a final frame with Forevermark's video and a customised message containing the keyed-in passion, which could be shared via WhatsApp and Facebook.

It is pertinent to note here that, of the 22000 women engaged with the communication, 71% were open to sharing their passion points with the brand. The overall campaign reach until now is more than 1 million, with an engagement rate of over 2%.



## Voice Trends & Predictions

Today, voice-enabled apps not only accurately understand what we are saying, but how we are saying it. Applications of this technology are seen everywhere, so let us take a look at some of the rising voice trends, usage and future projections.

### Voice AI is changing consumers digital behaviour

With the emergence of digital voice assistants, voice search trends have played a vital role in changing consumers' digital behaviours. The most prominent examples of digital voice assistants are Amazon Alexa, Google Assistant and Cortana.

Search is central to brand advertising and continues to expand its usefulness to the consumer. It's becoming more intelligent and it's the start of customizing results based on customer intent. And as technology, Voice is becoming more sophisticated as the focus of voice search is shifting from a list of links to specific answers.

# Trends

## Customer experience makeover

When the famous brand [Sephora](#) decided to launch a voice application, it already had the experience of a chatbot deployment to draw and build on. Following the mantra “launch quick, test, then scale”, the initial application permits users to interact with the brand through the Google Assistant platform to reserve an appointment for a beauty treatment in-store. It also provides access to their quizzes, how-to videos, tutorials and podcasts made by the top beauty influencers.

However, this is just the start. Sephora believes that this new channel will enable it to more closely follow its audience and that voice is “much more than a trend, it is a small digital revolution and a key channel.” The customer experience makeover is all about a seamless voice experience journey.

## Rise of conversational marketing

Voice search is fast becoming more common, and conversational AI is developing quickly to keep up. This isn't a trend that's going to slow down. Conversational marketing is the fastest way to move buyers through marketing and sales funnels through the power of real-time conversations. It builds relationships and creates authentic experiences with customers and buyers.

## More into voice and data analytics

We can say that custom-built solutions are the way to a modern customer's heart. Consumers want it all: they need their time to be spent intelligently, they need a prompt response when they have a problem, they want more control, and they want more personalized content. When the content is customized, it means the customers are more likely to engage with it. More brands will be on their way to market expansion and into the voice channels with a lot of options — they can build up a smart voice bot, or their voice assistant or skill for existing assistants.

Voice technology has a major impact on conversational marketing. It is a great field of opportunities here. Companies can gather their customer data and their buying habits. They are the most important segments here — based on these insights, companies can build their marketing and product strategy.

## In-car assistants

A built-in smart assistant in a car is the rule. Smart Assistant gives that additional control when your eye is set on the road and hands are on the wheel. It is significant that the automobile manufacturers will follow the [Mercedes' path](#) — naming their assistant after the brand's name.

## Voice-enabled smart TVs

Virtual assistants and smart TVs are coming closer together, although in 2020 their feature set would probably stay limited. Perhaps, we will even see some first implementations, but to become a real trend there should be refined microphone arrays and the ability to access all the skills in the skill store (including those of the third-parties).

## Voice games on smart displays

Smart displays are on the march, they expand voice tech's functionality pretty much. And the [main driver here is games!](#) Entertaining content accustoms users to new interfaces, which in return helps break down barriers and embrace new technologies. Games have always promoted the development of new technology, and it is to be expected that we will see some new mechanics and design approaches.

## More personalization in customer service

Personalization is a way to a modern customer's heart.

Consumers want it all: they need their time spent rationally, they need a prompt response when they have a problem, they want more control, and they do want personalized content.

Making it customized means your customers would more likely engage with it. More and more brands will get on with their [market expansion into the voice channels](#). And they got a lot of options — they can build up a smart bot, their voice assistant or skill for existing assistants. [Conversational marketing](#) is a great field of opportunities here.

## More customer data analysis

Through the above-mentioned channels, companies gather customer data. And buying habits are the most important files here — basis these insights, companies build their marketing and product strategy. [New solutions](#) applying strong analytics tools simply make it easier.

## Enterprise voice assistants

Big corps will aim to build an in-house R&D. Now that most of them run their websites and apps, assistants [will be integrated to exercise some functions](#) with voice. Tapping will stay, it just will be updated with Voice to step up some common processes like navigation, help, FAQs, etc. At the same time, all the information is automatically transferred to the CRM system, and a bot sticks to the specific script depending on the lead's type.

## Business skills and real-time translation

This is a slow trend, but eventually, it will change the way we communicate at work drastically. Think of new ways to hold a meeting or check Microsoft's ideas on the new work collaboration. The most important thing that we will see soon is a real-time translation.

For example, you are on phone with a foreigner whose language you don't know, and while they speak to you, the system translates the signals right into your ear.

# Predictions

## Interactive Voice ADS

Clients are growing more interested in how they can begin to exploit these opportunities not only as part of their voice strategies but as a part of their overall paid media mix. Importantly, the medium seems to be appealing to end-users.

As streaming audio and video services continue to gain consumers' shares of media consumption, the use of interactive voice ads will grow alongside. While it is still early for these types of ads, engagement with branded content and simple commerce experiences via audio have already gained traction. In the coming years, we should expect to see more interactive and personalized audio ad activations, across more surfaces.

## Passive Content Consumption Gets Active

The current model of product sponsorships and integrations into TV shows or podcast advertising is a prime area for voice ads to disrupt and enhance. In the coming years, we'll likely have the opportunity to vocally opt-in to hear more about a brand's message or receive an offer during these types of ad breaks. This would help minimize irrelevant offers for listeners, improve relevance for listeners, and allow networks and program managers to develop new offerings for sponsors.

## Taking Voice Ads On-The-GO

Voice ads will look to expand from smart speakers, phones, and TVs into all devices that have microphone access. This could have big implications for brands looking to reach on-the-go consumers in the car or wearing smart earbuds. If voice ads can become part of these surfaces and take advantage of contextual data like geographic location, brands will have a variety of exciting opportunities to reach listeners with real-time offers relevant to their activities.

## Getting Personal

With advanced targeting capabilities available through streaming providers and services, it's only a matter of time until voice-enabled ads make use of this data. We expect to see brands leveraging this to create more unique, sequential audio advertising programs as well as serve more tailored offers and data-informed recommendations to listeners and viewers. The more data advertisers can act on, the more relevant and valuable content or offers can be served to engaged listeners.

Beyond engagement, the new ad format is opening up unique use-case scenarios for brands.

With Axe as a pilot partner in 2019, Spotify [explored](#) driving users to a branded playlist using the ads. Now, the streaming service has leveraged its interactive ads to support product [sampling programs](#) for brands like NARS in the UK. Amazon is also staying present in this space, [gearing up](#) its Alexa audio ads program and encouraging brand partners to utilize these ads as a way to drive e-commerce and voice shopping, a behaviour that Adobe Digital Insights [anticipates](#) will see significant growth. More recently, we've seen NBC Universal's Peacock streaming service [launch](#) voice-powered "on command" ads that allow TV viewers to interact directly with commercials via the mic in their remotes.

## Voice Gaming

In July 2019, there was a 160% increase in voice-powered Alexa games from the previous year, proving that this kind of engagement is more than an early voice trend.

Voice's impact on the gaming sector doesn't stop at voice-led games, it can also be weaved into existing platforms and games as a way to enhance gameplay or as an added layer of interactivity.

For example, voice can be embedded into hardware and physical components of gaming. Google Assistant can now launch games on its Stadia platform by allowing users to speak to the controller.

Similarly, Amazon's new cloud gaming service Luna has its personalised Alexa-enabled controllers.

The larger opportunity that is emerging in voice-enabled gaming is the ability to integrate assistants as part of the core gameplay, providing insights and strategies to players in real-time. With headsets being a permanent fixture for serious gamers, assistants are a perfect fit for in-ear advice and analysis.

As one of the most popular uses of voice today, gaming is poised to continue gaining momentum and drive unique applications of the technology.

Since voice technology emerged, voice AI has been continually refined to be more realistic and human-like. As video games continue to reinvent the cutting-edge with impressive graphics, new platforms, and immersive gameplay, Voice could be the next frontier, both from a character and player standpoint. For in-game characters, we expect to see voice AI replace or enhance voice actors' roles by creating realistic and unique synthetic voices that bring new depth to on-screen characters. For players, we can imagine their voices being processed in real-time by voice synthesis technology so they can immerse themselves deeper in avatars and customize how they sound to others across headsets.

## Connected Homes

The smart home no longer consists of just smart speakers—it's a smart environment with smart security, alarms, HVAC controls, and more.

With the push to expand presence, the smart atmosphere now exists beyond the home in apartment complexes, care centres, and dorm buildings.

## The Smart Home Becomes the Voice Assistant Battleground

Devices that can support multiple assistants point toward a standardized smart ecosystem, where consumers can choose what assistants they use and how their appliances connect. By facilitating this kind of smart environment, we anticipate greater competition between tech companies to differentiate their assistant offerings based on core capabilities and intelligence vs. through new hardware and devices. Becoming the assistant of choice will help tech companies transform into the operating system of the home.

## Voice Will Become Standard on New Appliances

We interact with countless devices daily, from our computers and TVs to kitchen and cleaning appliances. Although voice assistants are already present in some brands' newest product lines, we believe that voice AI will become a new standard feature for all smart appliances. Additionally, we're likely to see new types of home interfaces for voice emergence. With voice already permeating everything from microwaves to thermostats, technology manufacturers may start going bigger—i.e. smart wall panels, kitchen counters, dinner tables, etc. If there's an area of the home that hasn't been connected yet, Voice will surely conquer it soon!

# Conclusion

## Things to keep in mind when building for voice:

- Don't look at Voice as simply an "add-on" novelty. Identify the key user needs, problems, or preferences that voice can solve for your product. This could be a way to help users navigate an app or add convenience to the way they interact with your brand.
- Think mobile-first when designing and implementing voice. India is a mobile-dominated market, and most people use their smartphone to search, discover, and be entertained.
- Partner with an agency or platform that understands your objectives, aligns with your passion and purpose for implementing voice features.
- Invest time in educating consumers about new voice features as you would, with any other new product or service. As technology evolves, education will help encourage adoption.
- With adoption and implementation moving at the speed of sound, the time to build and market for voice is now. By creating an ecosystem of devices and service providers, brands can build meaningful experiences with users that allow them to interact in a way that is natural and familiar to them. By adopting voice, brands can encourage new users to their platform and see higher engagement at scale while offering a better, more intuitive user experience.

# References

<https://voicebot.ai/google-home-google-assistant-stats/>

[http://clarity.annalect.com/rs/421-OYX-019/images/annalect\\_whitepaper\\_voice\\_ai\\_conversational\\_customer-journey.pdf](http://clarity.annalect.com/rs/421-OYX-019/images/annalect_whitepaper_voice_ai_conversational_customer-journey.pdf)

<https://medium.com/crowdbotics/how-to-build-a-custom-amazon-alexa-skill-step-by-step-my-favorite-chess-player-dcc0edae53fb>

isobar

11

# MMA Initiatives



# About MMA

Comprised of over 800-member companies globally and 15 regional offices, the MMA is the only marketing trade association that brings together the full ecosystem of marketers, tech providers and sellers working collaboratively to architect the future of marketing, while relentlessly delivering growth today.

Led by CMOs, the MMA helps marketers lead the imperative for marketing change – in ways that enable future breakthroughs while optimising current activities. The MMA is committed to science and questioning and believes that creating marketing impact is steeped in constructively challenging the status quo, encouraging business leaders to aggressively adopt proven, peer-driven and scientific best practices, without compromise. The MMA invests millions of dollars in rigorous research to enable marketers with unassailable truth and actionable tools. By enlightening, empowering and enabling marketers, the MMA shapes the future of modern marketing propelling business growth.

1

To cultivate inspiration by driving innovation for the Chief Marketing Officer.

2

To build the modern marketing capabilities for marketing organizations through fostering know-how and confidence.

3

To champion the effectiveness and impact of modern marketing through research providing tangible ROI.

4

To advocate for modern marketers.

Anchoring the MMA's mission are four core pillars; to cultivate inspiration by driving innovation for the Chief Marketing Officer; to build marketing capabilities for marketing organizations through fostering know-how and confidence; to champion the effectiveness and impact through research providing tangible ROI measurement; and advocacy .

Members include: HUL, P&G, McDonalds , ITC Limited, L'Oreal, HDFC Bank, Mondelez, Kraft, Diageo, ICICI Bank, Flipkart, Reckitt Benckiser, Perfetti Van Melle, Autumn Grey group, ABG, GroupM, DAN group, Lodestar, Httpool, Godrej, SonyLIV, Kantar, InMobi, AdColony, Spotify, JioSaavn, Google, Facebook, Intel, Disney+Hotstar, MX Player, Double Verify, Blis and many more. The MMA's global headquarters are located in New York with regional operations in Asia Pacific (APAC), Europe/Middle East/Africa (EMEA) and Latin America (LATAM).

For more information see [www.mmaglobal.com](http://www.mmaglobal.com)



# MMA INDIA BOARD MEMBERS

Chair



Amit Jain



Co-Chair



Prasanth Kumar



Chair Emeritus



Priya Nair



Sandeep Bhushan



Deep Thomas



Sukhleen Aneja



Rajesh Ramakrishnan



Gulshan Verma



Avinash Pandey



Ravi Santhanam



Sankalp Mehrotra



Anusha Shetty



Sameer Singh



Sunil Lulla



Moneka Khurana



Nandini Dias



Preeti Reddy



Shamsuddin Jasani



Rohit Dadwal



Manish Aggarwal



Sapna Chadha



Arvind R P



Roshni Das



Prabha Narasimhan



The MMA AMMP Community is a credible industry resource centre for everything one needs to know on modern marketing.

The circumstances of 2020 accelerated digital innovation and adoption by several years hence for MMA it becomes the best time to showcase growth frameworks, opportunities in the space of modern marketing.

With this in mind, in 2021, MMA brought together a high-powered ecosystem to 'Accelerate Modern Marketing Practices' (AMMP).

The MMA AMMP Community is a specialized taskforce with elite leaders across the below six core councils:

- Martech
- E-Commerce
- Voice & Audio
- Brand Safety
- Creativity
- Media Effectiveness

The key objective of the taskforce is to enable resources, tools, evangelism and education to accelerate modern marketing practices in the ecosystem.

Below is an overview of our taskforces that enable AMMP:



The objective is to enable pioneering marketers to understand the dynamically evolving nature of modern marketing. The Council seeks to add value to marketers by helping them to assess & adopt the right Martech stack, enabling business transformation and optimise marketing KPIs.

The E-Commerce Council seeks to build an overall understanding of the ecosystem and address cluster-specific issues, build capability in the Omni Channel Marketing and streamline the ecosystem through building a common vocabulary and enable industry standards.

**AMMP** | ACCELERATING  
COMMUNITY | MODERN  
MARKETING  
PRACTICES

**ACCELERATING  
VOICE & AUDIO  
PRACTICES**

**AMMP** | ACCELERATING  
COMMUNITY | MODERN  
MARKETING  
PRACTICES

**ACCELERATING  
BRAND SAFETY  
PRACTICES**



The Voice & Audio Council seeks to create leadership & evangelism for marketers to better understand the dynamically evolving nature of voice marketing and enable guidelines, use cases, expertise to exploit the platform.

The Council works on enabling best practices, standards & guidelines for brand marketing & performance marketing by driving compliance at various levels in the ecosystem amongst stakeholders to deter ad-fraud.

**AMMP** | ACCELERATING  
COMMUNITY | MODERN  
MARKETING  
PRACTICES

**ACCELERATING  
CREATIVE  
PRACTICES**

ABP Network GREY | autumnGREY FACEBOOK  
f d @ v



HEALTH · HYGIENE · HOME



**AMMP** | ACCELERATING  
COMMUNITY | MODERN  
MARKETING  
PRACTICES

**ACCELERATING  
MEDIA  
EFFECTIVENESS  
PRACTICES**

ABP Network

FACEBOOK  
f d @ v



CONSUMER PRODUCTS



We understand your world



HEALTH · HYGIENE · HOME



The Creative council works extensively in building guidelines and best practices for effective short-format advertising content.

The council seeks to enable POV on cross-media reach and mobile effectiveness versus other media & assess the impact of new media on business outcomes.

To learn more about the MMA AMMP Community & its initiatives, [click here](#)

Become a part of the MMA AMMP Community, contact us at [mmaindia@mmaglobal.com](mailto:mmaindia@mmaglobal.com)

**VOICE & AUDIO  
ADVISORY COUNCIL**



**SAPNA CHADHA**  
Senior Country  
Marketing Director,  
Google India &  
Southeast Asia



**SHAMSUDDIN  
JASANI**  
Group MD,  
Isobar South Asia  
& India



**SREERAMAN  
THIAGARAJAN**  
CEO,  
Agrahyah Technologies



**NIRAJ RUPAREL**  
Head of Mobile &  
Emerging Tech



**VIRGINIA SHARMA**  
Vice President,  
Brand Solutions



**M.V.S. MURTHY**  
Head – Marketing,  
Digital & Corp. Comm.



**ANJALI KRISHNAN**  
Consumer Experience Lead,  
India & Bangladesh



**KUMAR RANGARAJAN**  
Co-Founder



# MMA Members and Industry Experts

We thank the following esteemed people for their valuable contribution to this report.



**Anjali Krishnan**  
Consumer Experience Lead  
– India & Bangladesh

**Mondelez**



**Kumar Rangarajan**  
Co-founder & Obsessive  
Dictator

**Slang Labs**



**MVS Murthy**  
Head - Marketing, Digital &  
Corp Comm.

**Tata Mutual Fund**



**Sreeraman  
Thiagarajan**  
CEO

**Agrahyah Technologies**



**Virginia Sharma**  
Vice President, Brand  
Solutions

**JioSaavn**

# This report is contributed by



**Gopa Kumar**  
COO

**isobar**



**Anadi Sah**  
Executive Creative Director

**isobar**



**Priyanka Shah**  
Senior Director Media  
Strategy

**isobar**



**Mamatah Sabhrwal**  
Director Strategy

**isobar**



**Nakul Sagar**  
Senior Group Head Client  
Solutions

**isobar**



**Niharika Malhotra**  
Copy Supervisor

**isobar**



## DISCLAIMER

*"All trademarks mentioned including third party brands, product names, logos, trade names, corporate names and company names may be registered trademarks or trademarks of their respective owners and their licensors and are used for illustration purposes under this report. Use of these names, logos, and brands does not imply endorsement of report by the owners."*

- Alexa is trademark of Amazon Inc, registered in the U.S. and other countries.
- Google Assistant, Google Home and Google Mini are either registered trademarks or trademarks of Alphabet Corporation in the United States and/or other countries.
- Cortana is the trademark of Microsoft corporation, registered in the U.S. and other countries.
- Siri is the trademark of Apple Inc, registered in the U.S. and other countries.