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VOICE REVOLUTION @ GLANCE

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MARKETING
PRACTICES

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CHIEF OPERATING OFFICER, ISOBAR IN

AGENDA

- *An overview of voice technology
Market : Global & India*
- *Factors driving the growth*
- *Industries & brands adopting
the technology*
- *The true potential of voice
technology*
- *Voice Strategy*
- *Future Predictions*

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

With 270% year-on-year growth in voice searches, India will soon become the world's first & largest voice-first market

Multilingual Indians find voice 3X faster than typing.

VOICE: AN EXTRAORDINARY JOURNEY



16.8%

CAGR takes voice recognition market to 27.155 billion in 2026 compared to only 10.70 billion in 2020.



50%

Of the searches are estimated to be voiced based by American Analytics Company.

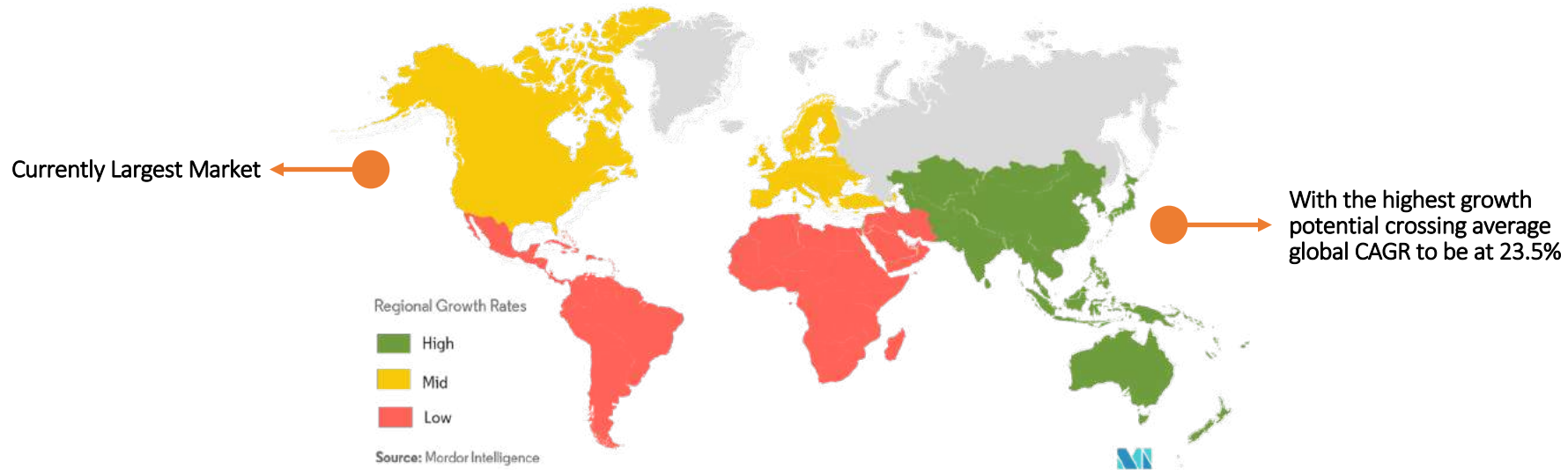


20%

Of queries on Google's mobile app & android devices are voice searches

AND APAC IS PAVING THE PATH FOR FUTURE

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



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INDIA IS ALREADY AHEAD OF THE CURVE

Voice is emerging as the preferred way for Indians to use search and browse YouTube.



40%

Is the projected growth for the country alone.



60%

Of users in India are interacting with voice assistants on their smartphones.



70%

Of new internet users in India are choosing to consume content in their native language



20%

Of all search queries in India are already done by voice.



24%

Of all gaana users are using voice to play their favourite song on the app.

THE FACTORS DRIVING THE GROWTH ARE:



Enhancing Customer experience

Resolving queries in real time by reducing the human error.



Increasing demands in contact centres

Strengthen the analysis of consumers' opinion, preference and buying patterns, letting businesses to provide more personalised & proactive services.



Decreasing fraudulent Transaction

The ever increasing requirement of voice enabled authentication in the BFSI industry will boost the growth in India.

IMPLEMENTED ACROSS INDUSTRIES



BFSI



CONSUMER ELECTRONICS

Largest share in the Voice market



E-COMMERCE



AUTOMOTIVE



RETAIL



GOVT. & DEFENCE



HEALTHCARE

Forecasted growth industry as growing focus on patients' engagement and growing number of chronic diseases.



OTHERS

WHERE BRANDS ARE DESIGNING SPECIFIC SOLUTIONS.

Voice technology is implemented through voice activated systems, virtual assistance systems & devices.



Simplifying the process

Paypal integrated with siri to let its users conduct peer to peer transaction with a simple voice command.



Stand out with contextual messaging

Gaana enforced Heart day messaging by curating a Bollywood playlist around 'Dil' by carefully giving witty messages around taking care of heart that originates from the song.



Tap into newer market segments

Tata Mutual funds reached 4.5 million streams a month in rural India to promote investments through progressive stories.

**BUT THE TRUE
POTENTIAL IS YET TO
BE EXPLORED**

1 *Greater opportunity for more meaningful assistance.*

Unlike typing, searching via voice naturally prompts the user to flesh out their query with more intent.

For example: User might type Window cleaning vs. searching via voice query will naturally change to “How to clean windows” or “Show me the windows cleaners near me”.



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2 *Higher probability of action taken as the most popular skills are utility-based.*

According to Google, majority of users turn to voice devices to multitask. For example: Alexa play music because they are cooking or Siri find what is the current weather situation like as they busy. This enables crafting solutions for specific needs like Dominos created service with which consumers can order pizza with voice or Whirlpool lets you adjust settings with voice command.



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3

High potential for advertising & greater loyalty

It will challenge the traditional search advertising as with the surge in voice based recommendations, consumers will interact more with the brands promoting. “You bought this, you might like that.”

In addition, recommendations will see the turn as “You are running out of X, shall I replace the same”.



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4 *Greater engagement with conversational marketing*

Unlike other mediums, consumers like to interact intentionally with brands through voice. It will be the fastest way to move up buyer through sales & marketing funnel to the power of real time conversation.

It lays the foundation for marketers to build more personal relationship and authentic experiences with consumers and buyers.



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THREE PILLARS OF BUILDING VOICE STRATEGY

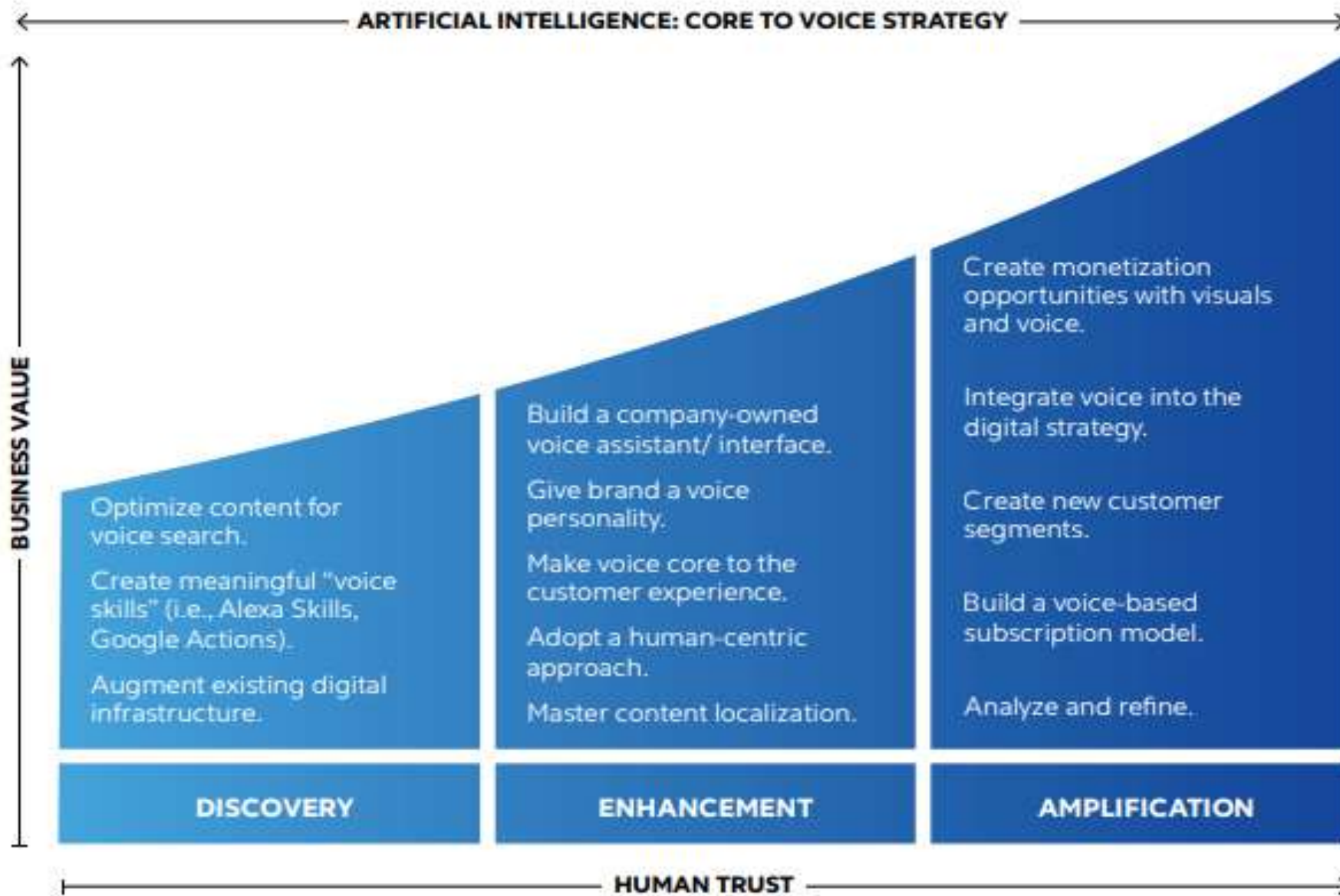


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PREDICTIONS FOR THE FUTURE



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KEY FUTURISTIC TRENDS

Interactive Voice ADS to encourage personalized audio ad activations

Passive Content consumption to vocally opt-in to hear more about a brand's message

Taking voice ads on the go will expand from smart speakers, phones into all devices with microphone access

Personalization to take another turn into more of sequential audio advertising programs

Voice to become standardized feature on new appliances

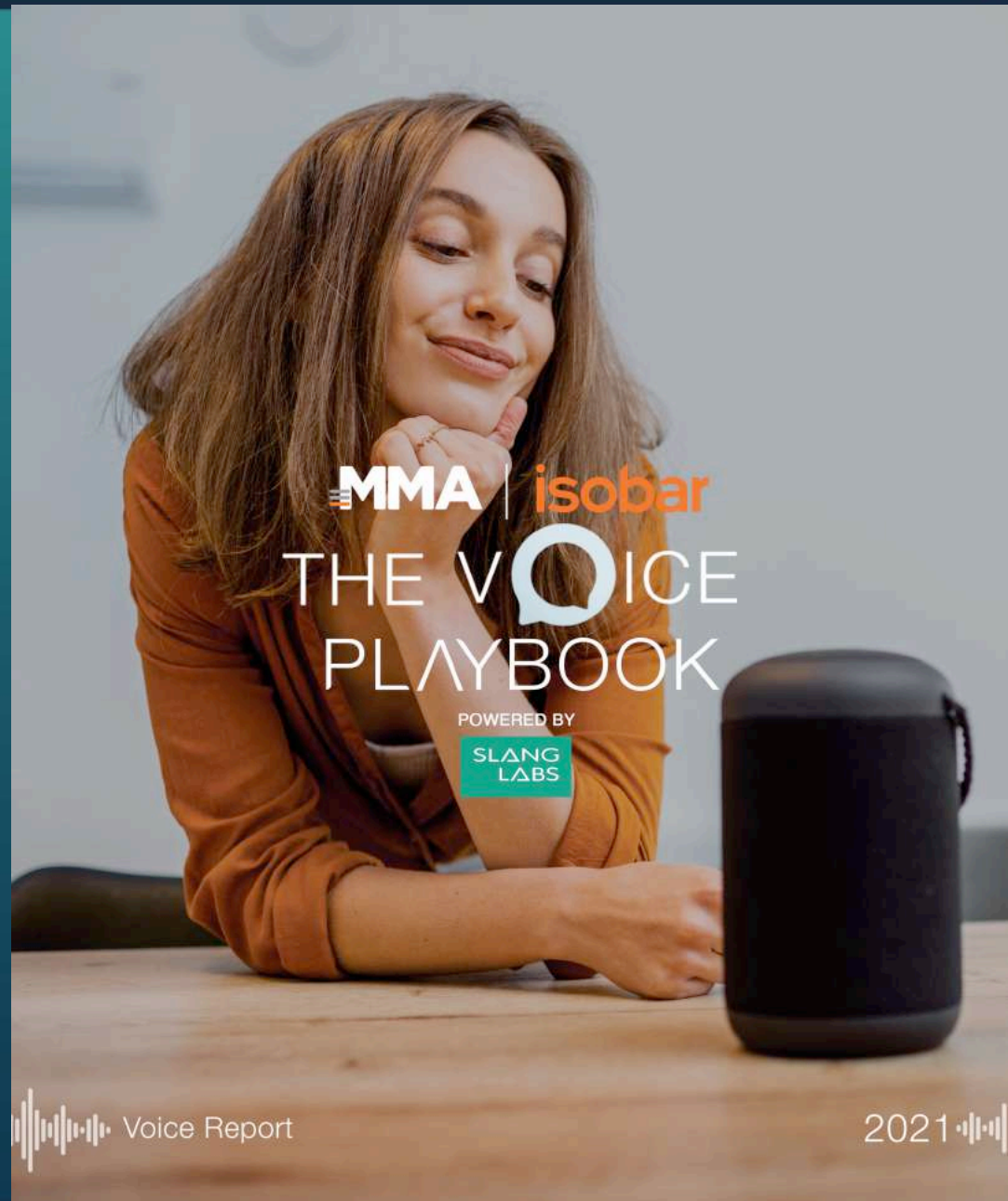
Tremendous increase in voice-powered games which enhance interactivity in gameplay

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 Voice Report

2021 

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