



Google

Building for Voice

Poll

How big is “Hindi” language on Google Assistant globally ?

3rd biggest language

5th biggest language

2nd biggest language

India is amongst the fastest growing voice markets globally



Source: CES 2020 announcement; Google for India 2019 announcement



500M+

Users globally use the
Google Assistant in a
month

Hindi

On Assistant is the 2nd
biggest language globally
after English



Not just on Google Assistant
**we see voice as
a preferred
medium of input
across Search
and YouTube**

270%

yearly growth of voice queries
on search



Key drivers of Voice adoption



User Need

Must be solving a core user need



Easy to Scale

Must be affordable & accessible
to mass adoption



Ecosystem

Need ecosystem to drive
touch points and also power
newer use cases





Why are indians adopting voice



Indians are leapfrogging on Voice adoption

Mobile is surface of choice for Voice



60% users use voice Assistants on phone

Indians are comfortable with Voice



Over **100M** cricket queries in Hindi received by Assistant in the 2019 cricket season

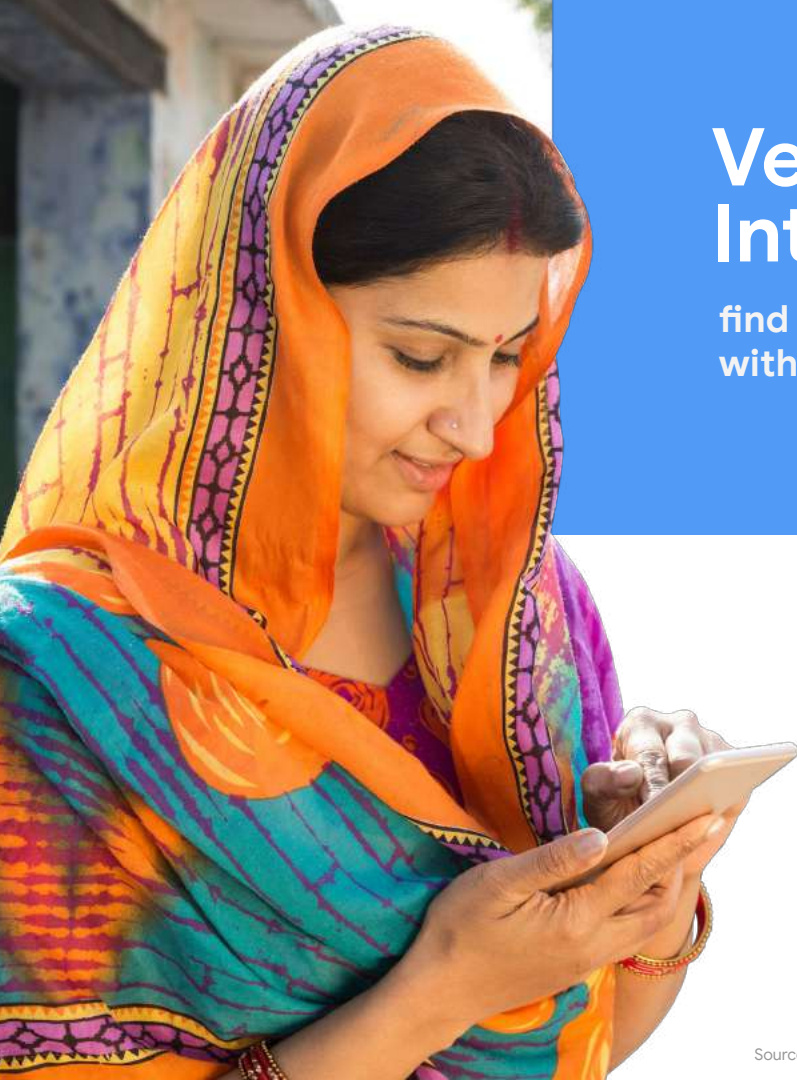
Majority Indians being multilingual find voice easier vs Typing



Voice is **3x** faster than typing

Powered by Machine learning, Assistant is becoming more naturally Conversational





Vernacular Internet users

find voice a more natural way of interacting with technology which helps reduces friction



72% of Internet Users in India prefer **non English** language



Voice is **3.7 times faster** compared to typing especially in Indic languages



Hindi queries grew 400% year-on-year on voice search



600M-700M Vernacular internet users expected by 2025; 2x of US population

Consumers use Voice for a variety of use cases

Across 9 indian languages

01 Information

कल मौसम कैसा रहेगा?



how many ounces in a cup



cricket



03 News

play news



ताज़ा खबर



02 Entertainment

open youtube



एक गाना सुनाओ



bahubali 2



04 Local

आस-पास के रेस्टोरेंट



supermarkets nearby



hows the traffic



05 Personality & Fun

tell me a joke



sing a song



play a game





And this is going to get even bigger

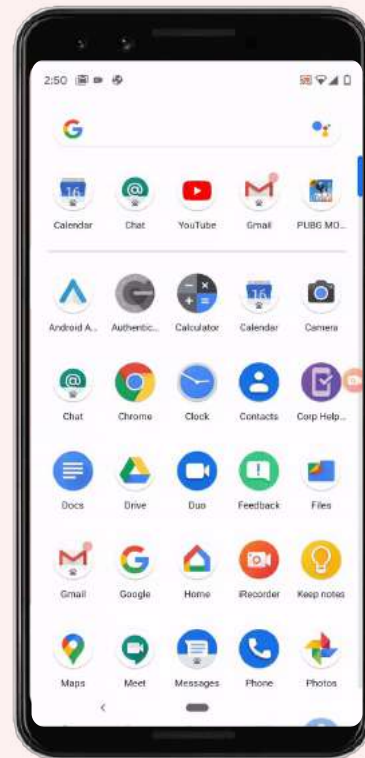
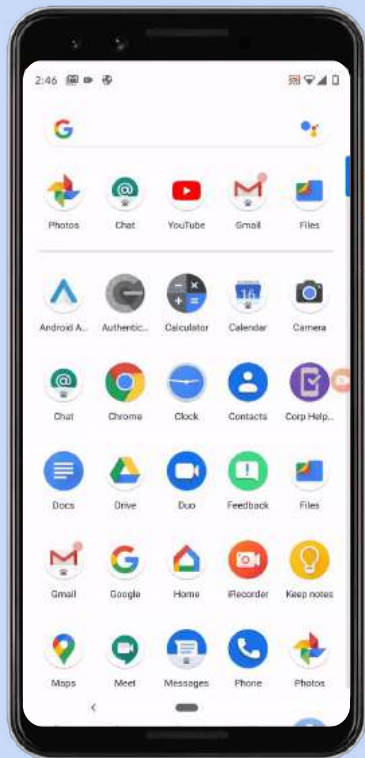
1B new Internet users will be acquired by voice

Smarthome market in India is expected to surpass **\$9B** by 2025



**Voice is
available
across several
surfaces**

Voice is present across all our big products



Apart from mobile, Voice is getting adopted on smart devices at home and on the go



Voice has
been able to
make
technology
more
accessible
and equitable

Google



Google Assistant on 100M Jio phone users

enables access to internet on their
phone through the Google
Assistant button

Google Assistant Phoneline for 2G users

brings the power of information to
users who do not have an internet
connection





Google

**We are seeing
an ecosystem
building
around voice**

As consumers adopt Voice, Ecosystem for Voice is at an inflection point

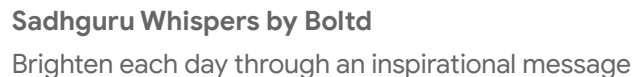
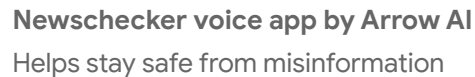
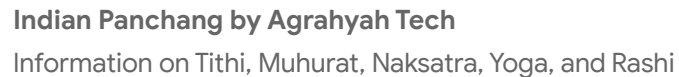
Brands

Tech Agencies

Startups



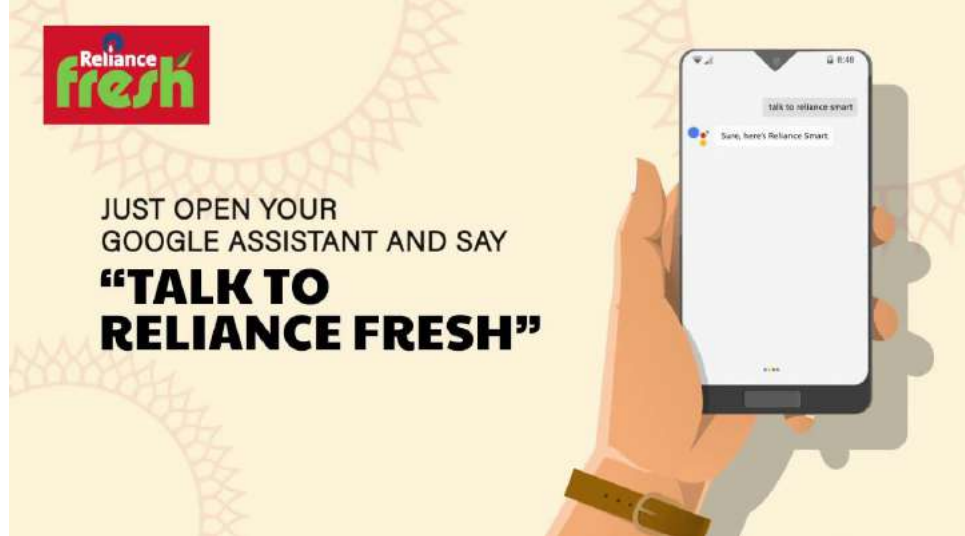
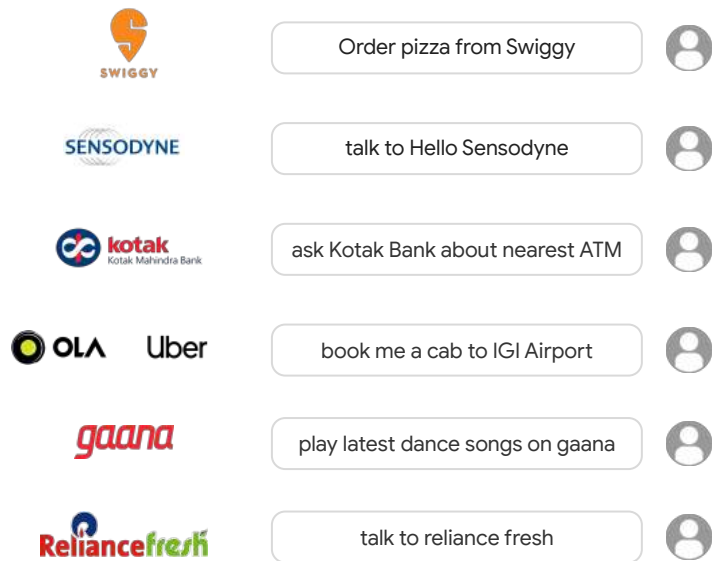
A hand is shown pointing towards a futuristic, glowing blue circular interface. The interface features a central microphone icon, suggesting voice search or voice-controlled technology. The background is dark and blurred, emphasizing the glowing interface and the hand.



Over **1 Million** Actions on Google are available today for consumers on Google Assistant

Brands

We have seen brands across all categories like CPG, durables, food tech, e-commerce, retail, media etc, experiment with Voice



Brands have also started to experiment with Voice using it as a means to create buzz with their consumers.

24% of Gaana's users use the voice search feature on the app every month

India has the 3rd biggest startup ecosystem with 10K+ Tech startups, with significant investment on Deep Tech (AI, ML, AR) solutions across B2B and B2C

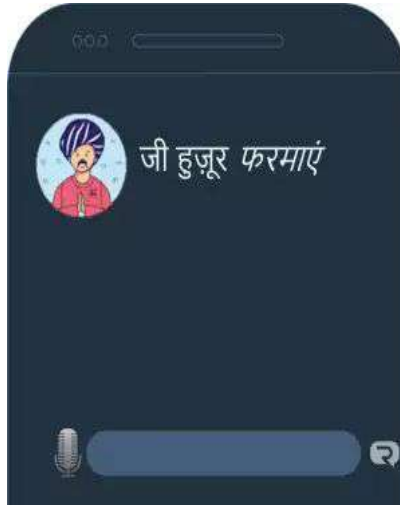
Vokal

Platform to get Voice answers
to common questions posted by
consumers in their own language.



Reverie Technologies Gopal

A voice suite for businesses
to engage with non-English
customers in 12 Indian languages



Dhiyo

A voice platform for jobs
where blue collar workers can create
their resume in their own language by
just speaking to their smartphone





User Need

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core user need



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Ecosystem

Need ecosystem to drive
touch points and also power
newer use cases

Indian users using voice on **Mobile**
and comfortable talking to phone
to get things done

Voice growing across **Search, YouTube
and Assistant.**

Tech Agencies have warmed up to
voice with over **1 Million** actions on
Google available today for users

Voice is **3.7 times faster** compared
to typing especially in Indic
languages

Voice adoption is high with 2G users as
well via **Google Assistant phone-line**
and **Assistant on Jio Phone,**

Brands have started to
experiment with Voice to aid in
their user experience

Vernacular Internet users find voice
a more natural way of interacting with
technology. **600M-700M Vernacular
internet users** expected by 2025;

Smart home devices market to
surpass \$9B by 2025

Startups across B2B and B2C
are building for voice

Poll

Do you think voice is relevant for your brand / platform ?

Yes

No

Don't know