



# THE VOICE EFFECT

ANTICIPATING IMPACTS  
ON SOCIAL, SEARCH  
AND USER EXPERIENCE

 **reprise**

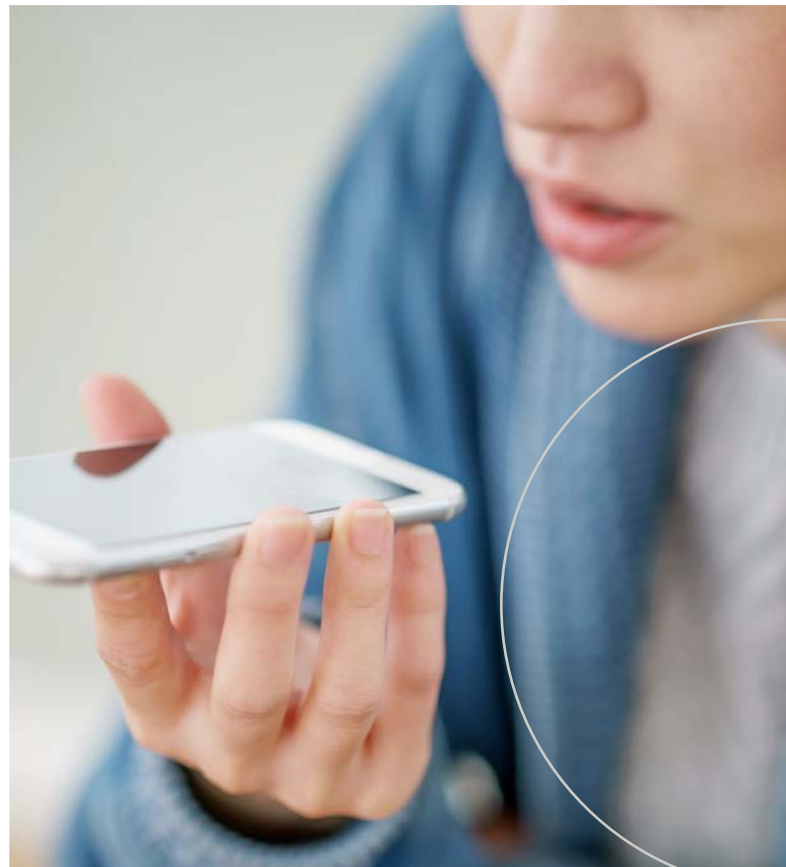
# INTRODUCTION

Voice-enabled virtual personal assistants have been an increasing presence in our lives since Apple launched Siri in 2011. Fast forward to now, Amazon has Alexa, Microsoft has Cortana and Google has Google Assistant. However it wasn't until smart speakers Apple HomePod, Amazon Echo and Google Home that they were able to push voice technology to its tipping point and into consumers' lives and homes.

The number of voice searches made, and voice-enabled devices sold, has been steadily rising. Over Christmas 2017 alone, consumers bought the best part of 16 million smart speakers globally<sup>1</sup>.

It used to be easy to dismiss the trend as just a lot of hype, but the hype has spurred adoption, and people are now getting used to life with voice assistants. In a 2017 NPR study on voice tech adoption, 65% of US owners said they would not want to go back to life without their smart speakers<sup>2</sup>. Voice represents a new evolution in how people discover and experience content. The more brands build experiences for their consumers, such as interactive voice ads or voice apps like Alexa Skills, the better the technology is getting at serving content that is more relevant to the query. This is already happening in regular search, but it is more engaging with voice.

The technology still has a way to go to develop into something that brands can utilise, but it is heading in the right direction. Gartner predicts an era of "voice first browsing", estimating that 30% of web browsing sessions will be made without a screen by 2020<sup>3</sup>. And it's more than just phones and smart speakers; the technology is set to spread to other connected devices. Automakers, such as Ford, Toyota and BMW have all announced plans to begin integrating Alexa into their new models<sup>4</sup>. So, as marketers, we can start to understand how this could work for our clients.



1. <https://www.theguardian.com/technology/2018/jan/06/how-smart-speakers-stole-the-show-from-smartphones>
2. <http://nationalpublicmedia.com/wp-content/uploads/2018/01/The-Smart-Audio-Report-from-NPR-and-Edison-Research-Fall-Winter-2017.pdf>
3. <https://www.gartner.com/smarterwithgartner/gartner-predicts-a-virtual-world-of-exponential-change/>
4. <https://techcrunch.com/2018/01/09/toyota-will-offer-alexa-in-its-cars-starting-later-this-year/>



To get an idea of the scale, one study forecasts that the number of voice assistants across all platforms – smartphones, tablets, PCs, speakers, connected TVs, cars and wearables – will reach 870 million devices in the US by 2022, nearly double the 450 million in 2017 <sup>5</sup>.

That's an average of six devices per household. In the UK, where voice adoption has lagged behind that of Germany and the US, one study predicts that 40% of homes will own at least one Amazon Echo in 2018, a considerable jump up from 9% in 2017 <sup>6 & 7</sup>.

The possibilities and opportunities surrounding voice are vast. At Reprise we have created award winning content and experiences for our clients. In this report, we look at current and future opportunities for brands with voice technology, its game-changing impact on search, social media, user experience and the changes it is bringing to consumer behaviour.

5. <https://www.businesswire.com/news/home/20171108005702/en/Juniper-Research-Amazon-Echo-Google-Home-Reside>

6. <https://digiday.com/media/state-voice-assistants-4-charts/>

7. <http://www.radiocentre.org/amazon-echo-set-to-hit-40-of-uk-homes-by-early-next-year/>

# A NEW LAND OF OPPORTUNITY

The arrival of voice search is akin to the behavioural shifts brought by text-based search in the late 90s and the mass use of mobile internet in 2007, with the launch of the iPhone. These technologies completely altered the way consumers sought information, and in turn, how they interacted with brands in this space.

Voice is making its own waves; what's special is the capacity for these assistants to understand conversational context. A quirk of human communication is the disparity between our speaking and our writing styles. Voiced questions reveal many things about us: our mindset, gender and our dialect, for instance. These assistants are built on artificial intelligence, which constantly learns from those using them. So, not only can they remember the likes and dislikes of users, but as people get more comfortable with searching conversationally, the technology will learn how to build context and judge the intent behind every question, in any given moment.

Equipped with this data, we can be far more targeted to our clients' audiences, and far more relevant.

It's not just about surfacing content at the right time; it's joining everything up and building the right experiences. Over time, given the way search engines have evolved, the brands that build consumer centric experiences will succeed.

At Reprise, we are big believers in helping early movers get new technologies right. We keep our eyes on the evolving impact of voice on social, user experience (UX) and search, enabling us to make recommendations to help our clients stay ahead of the game.





### MAKING SOCIAL MORE SOCIAL

People used to think that voice's impact on social media would be to let Siri write posts on Twitter and Facebook<sup>8</sup>. Now social strategists are finding that it is impacting the content they put on social channels. By keeping track of queries relevant to their offerings, brands can create content in answer to popular questions.

Social networks also have their own search functions, and since voice is making search more intuitive, it will become easier to search for content on platforms like Facebook and Snapchat. The easier it is, the more connected people will become with their social channels.

Many audiences already use their Facebook profiles to log in and sign up for apps like Spotify. If Alexa is able to access the Facebook profile of someone using Spotify, that opens up an even deeper source of data for brands to serve relevant content to the user.

The main obstacle to this becoming seamless is consumer fear over privacy, but if the past decade is anything to go by, the more convenient a new technology makes our lives, the more willing we are to share our data.

### MAKING USER EXPERIENCE MORE USER-FRIENDLY

On the surface, the UX of voice technology is not vastly different from what consumers are used to

with text input. However, there are a few fundamental differences that brands and UX professionals need to be aware of. The first comes from the more conversational nature of the interaction. The richness of language means there are a hundred different ways to ask Alexa where to get a good coffee. Machines must be able to understand and respond to thousands of different commands in order to keep the conversation, and therefore the UX, feeling natural.

Almost the inverse of search input, it takes longer for results to be read out in voice than it does via text. If what consumers are looking for is quick answers, they have to be just that – quick. Content must be optimised for audio, which means getting across the information concisely. With current robotic and monotone voices, assistants' answers won't be suffered for too long.

This is not to say that visual UX is going anywhere just yet. Smartphones still have screens, smart speakers like the Echo Show have given Alexa a visual interface, and the Google Assistant is now plugged into smart tablets like the Lenovo Smart Display. This means the way results are displayed will progress more or less as they do on smartphones and will open up more opportunities for brands to appear in search results.

8. <http://sendible.com/insights/voice-search-and-social-media>

## MAKING SEARCH MORE INTUITIVE

The difference between voice and regular search is the context that voice builds. People use more words in their initial search queries and assume their assistants will have the context behind their follow-up queries – just like a human conversation. This new way of searching means SEO professionals are becoming more vigilant. Brands need to be aware of the new keywords entering the lexicon as language evolves and dialects change.

Search data has shown us that, as people have become used to how much tech companies know about them, they are treating search engines like personal advisors. Mobile searches ending with “for me” have grown by 60% in the last two years. It’s no longer what is the “best laptop”, it’s what is the “best laptop for me”. People now expect relevance from their searches, and the growing familiarity with voice assistants provides for that.

When it comes to SEO, voice search is effectively the same as regular search. However, search engines do not pass along the data that differentiates between searches input as text and searches input as audio to SEO practitioners. Once this changes, brands will be able to start pushing out different messaging depending on whether the search is by text or by voice.

Brands need to be aware of the interests of the voice-assistant providers, who are going to have to strike a balance between their own interests and those of the consumer. If a coffee shop is recommended because it has better SEO or AdWords, rather than being the best for the consumer based on location, it erodes trust in the technology, which is bad news for the providers. Relevance should trump brand interests.



# RETHINKING STRATEGIES FOR VOICE

## SPONSORED SPEECH

There are still some kinks that need to be ironed out before brands can start advertising through voice. One is the balance between relevance to the consumer and commercial benefit for brands. The other is invading a user's privacy. There have already been several backlashes against perceived invasiveness.

For example, when Burger King created a TV ad designed to trigger viewers' Google Homes and Android phones to search "What is a whopper?", many people cried foul, and Google had to step in to block it from happening <sup>10</sup>.

On a screen, it's easy to scroll past the sponsored results. With voice, we only hear the top ranked. So, if Google and Amazon start allowing paid results, brands need to anticipate that users will not accept anything less than the most relevant ad possible.

When optimising, brands need to consider "the moment" – the context behind the consumer's intent, mood and mindset at that point in time, to make sure messaging is relevant. With regular search, we can see a user's geolocation, the time of day and what device they are using. Voice adds an extra layer to help assistants decipher the consumer mind-set through variations in language. By connecting to other parts of the assistant's ecosystem – for instance, calendars, skills (apps) and shopping lists – the data will become much richer. Eventually, brands will have more power regarding how they choose to communicate at that moment.

## ELOQUENT SEO

Paid opportunities aside, there are plenty of things that brands can do with their SEO to reach their audiences organically. First, understand that most voice search takes place on mobiles, so ensure that your website is mobile-friendly and fast loading.

Currently, the only place to be is in the Quick Answer box. This is the box-out content that answers queries directly via the search engine results page. So it's important to optimise your content to get in there.

Using a language called schema mark-up, search professionals can tell assistants the most critical pieces of information to include in their Quick Answer, so the user does not need to listen to an entire webpage of content. If you have data arranged in lists - a recipe for instance - your SEO team can mark it up with relevant tags.

For more conversational answers, writing a FAQs page will make content more attractive as it is already in question and answer format. Writing content in a conversational style will further help search engines find conversational keywords.

10. <https://www.voicebot.ai/2017/03/17/google-home-just-served-an-ad-alexa-uses-a-different-approach/%20/>

## WELL-POSITIONED SECTORS

The brands that are winning in voice are the same as those winning on mobile, particularly where consumers can start and finish a purchase journey via their smartphone. This consumer journey tends to be low-value retail purchases, such as grocery and fashion, and face-to-face services like hospitality.

But even though consumers are not likely to buy a house via mobile, as the final destination for purchasing big-ticket items is elsewhere, you can't discard voice as a touch point that can influence that journey.

Digital assistants use different sources of data, like geolocation, calendar updates and word choice to build a picture of the consumer's moment. Just as it is with mobile, the brands that can surface the most relevant content for the on-the-go moment are also winning. People speaking to their phones generally want results immediately. "Where can I get nappies at 4 am?", "show me florists near my office". They expect brands to solve their immediate problems with the right content.

Things may be easier for some sectors, but it doesn't mean others can't get in with some clever optimisation. Take FMCG brands. It benefits both the supplier and the retailer when someone knows the nearest place to buy their product. FMCG brands can also build awareness of their brand through voice search. The suggestion just has to be relevant to the moment.

For example, over the past decade Coca-Cola has run a Christmas campaign that offers designated drivers their second soft drink for free when they show their car keys at a bar<sup>11</sup>. Say someone asks their Alexa-enabled car "what's the drink driving limit?" and it can see a calendar invite to a bar that

night, surfacing this campaign then makes a lot of sense. The same campaign at a different moment could be seen as jarring.



11 <http://www.coca-cola.co.uk/stories/in-december-we-thank-the-heroes-of-the-party-season>



# THE FUTURE OF VOICE

By 2022 there are forecast to be 870 million devices with voice assistants in the US – including smartphones, tablets, PCs, smart speakers, connected TVs, cars and wearables – up 95% on the 450 million in 2017. Smart speakers will account for a fifth of that number, while phones will be the dominant voice-enabled devices, with five billion in use globally<sup>12</sup>.

Future gazing always has an element of imagination, but at Reprise we already see trends in how the technology can be used. From a search perspective, brands should take notice of the increased ability of voice to detect conversational quirks and the intent behind what people are asking their devices. It means there is going to be a lot more to think about when assistants can access more than just consumers' search history. A brand that has built its own app on a phone or an Alexa skill will have to think about how the assistant accesses the information on those sources.

Research into brand sound has a clear learning: listeners respond positively to familiarity. Familiar voices used consistently over time and across different platforms drive likeability and deeper engagement with content<sup>13</sup>. Brands are going to be able to have a brand tone of voice. At the moment there are only the Alexa, Google, and Siri tones of voice – they can change gender and accent, but they remain the assistant's voice. In time, there will be ways that SEO practitioners can give voice assistants a temporary identity swap, laying out specific instructions on how to interpret pieces of information on a website or on a skill. Morgan Freeman as Mountain Dew's ambassador on TV, and his voice on Echo? Why not?

12. <https://www.businesswire.com/news/home/20171108005702/en/Juniper-Research-Amazon-Echo-Google-Home-Reside>

13. <http://www.radiocentre.org/advertising/research/studies/getting-vocal/>

## WHERE'S FACEBOOK?

Of the biggest tech companies in the world, Facebook has been remarkably absent from the voice revolution. The company cancelled work on its voice assistant, called M, in early 2018, but leaks show that it is working on a smart speaker called Portal<sup>14</sup>.

Many people, especially in emerging markets, use Facebook as their entry point to the internet. For some it is their entire connected experience, giving

the company a big advantage in commanding people's attention. If Facebook incorporates more voice technology into its experience, it's logical to expect the network will be able to harvest valuable data from search queries within its app, just like Google is doing. This means better targeting and more cost-effective paid ads, so we'd do well to keep an eye on the network.



14. <http://adage.com/article/digital/facebook-steal-home-speaker-show-screen-device/311897/>

# THE FINAL WORD

Looking back over the years one can visualise the development of consumer technology as a journey towards integration with humanity, and see voice as the latest stage in this journey. Each ground-breaking new device or piece of software has been made more and more intuitive. In 1975, PCs arrived as complex hardware that users had to master with lessons or manuals. In 2007, smartphone designers introduced devices easy to use for the busy consumer, essentially pocket PCs but with a more streamlined operation. By 2010, three and four-year-olds were using iPads almost as well as their parents.

Today, anyone can use a voice assistant, tech-savvy or not. The UX is designed to mimic human, conversational interaction. This is a chance for businesses to become even more human in their communications with customers.

At Reprise we already have the ability to build voice-enabled experiences for our clients, helping them stay ahead of the competition. We believe that those businesses that get there first, and build these experiences, will be the ones who continue delivering to their customers.

As everybody gets used to a voice-enabled world, those who fall behind in creating a seamless experience will lose out. Just as consumers today bounce from an outdated website, they will feel the same towards brands that do not deliver the voice experiences they expect.