



Industry Report

Voice Search Thinking Beyond Alexa, Q2 2019

For B2B And B2C Marketing Professionals

WHY READ THIS REPORT

Voice search is exploding, and there is first-mover opportunity for brands that understand how their customers are using the technology and associated devices. We have researched and analyzed how mobile voice assistants and a wave of smart speakers (Google Home, Amazon Alexa, Apple HomePod) respond to brand, industry, and product questions for more than 50 B2B and B2C brands. This report illustrates how each device measures up when asked specific questions and helps B2B and B2C marketing professionals move strategically into voice search.

KEY TAKEAWAYS

Don't Miss the Boat

Right now, there is first-mover opportunity to **own your brand**. The global market for smart speakers grew 187% in Q2 2018², and sales of these devices are poised to **overtake tablets** by 2021¹⁵. A study¹ of over 70,000 businesses indicated only 4% were 'voice search ready'.

Not Just Alexa

Alexa currently has the dominant market share (around 70%)⁴ but developing Alexa Skills may not be critical to your brand's future in Voice Search. Google Home's share rose almost 6% last year to 24% overall⁴, and, based on our research, provides more consistent results and a better user experience.

Getting Started with Voice

Start thinking about your 2020 voice search strategy by embracing the 4 Pillars of voice - **Question Discovery, Answer Retrieval, Answer Sources, Optimization**. Develop a Center of Excellence framework that includes pilot programs, content, staffing, standards, processes, technology, education, measurement, and governance.

Looking Ahead

New devices are coming this year from Facebook, Baidu, Samsung, Alibaba & many more. Google Assistant is available in 80 countries & 30 languages⁵. Amazon Show & Lenovo Smart Display are combining voice & screen interactions. Brands that engage now will have a significant advantage as the market matures.

THE OPPORTUNITY

Voice search is **not just about Alexa**. The rapid adoption of voice-activated applications and dedicated devices, along with steadily improving results enabled by artificial intelligence, represent a tremendous **first-mover opportunity for brands**. With the opportunities come challenges. Notably, today's voice search experiences also pose a potential **threat to brand safety** with digital assistants frequently delivering many incorrect answers or no answer at all – aka “I don't know that...”.

The short-term opportunity is to **own your brand**. Meaning, with all the voice assistants, devices and variations in responses, many brands are not equipped to provide the “right” answer (or any answer for that matter) to the questions customers are asking.

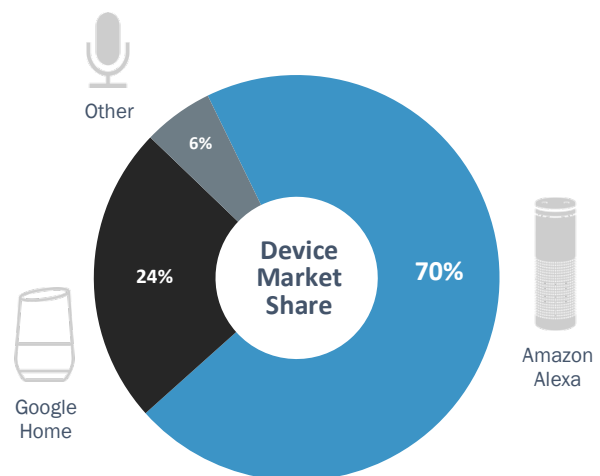
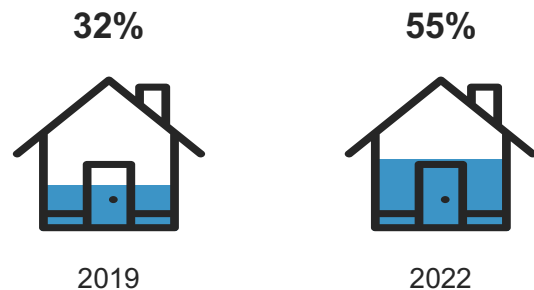
In fact, in our audit of **more than 50 B2B and B2C brands**, we found that most of the devices **do not deliver any answers** to frequently asked questions. When an answer is provided, approximately **half of the time it is incorrect or out-of-date**. Structuring your content to deliver answers to critical questions posed in voice search could put you ahead of the competitive curve.

The long-term play is in capturing the non-branded queries that are also happening earlier in the buyer journey. Consider a hot new topic like 5G. Imagine all the variations – “What is 5G?”, “5G for business”, “How fast is 5G?”, “When does 5G go live?”, etc. The brand that provides the answer to those early stage queries will gain topical authority and competitive advantage.

DEVICE LANDSCAPE

According to TechCrunch, smart speakers have now reached critical mass⁶, with Alexa and Google Home leading the pack. Apple's HomePod is a distant third. Over 32% of U.S. households own a smart speaker, which is projected to reach 55% by 2022⁷. Alexa and Google Home were responsible for doubling the adoption rate in the U.S. There are more than 100 million Alexa-enabled devices⁸ in use today, and Google Assistant is reportedly available on **over a billion devices**¹².

US Households Own a Smart Speaker



INTENT & BEHAVIOR

The old marketing funnel is dead. Understanding a customer's **intent**, backed up by data, is the real future of marketing.

With voice search, different devices themselves may infer different types of intent. For example, when you use Google Assistant or Siri on a mobile device, you are likely on the go. Alexa sits in the household and has multiple uses. Dashbot reports that more than 65% of users say that the devices have **changed their behaviors** and that 63% use one specifically for **asking information** (search)⁹.

There are many bold predictions and over-used quotes such as the famous one from comScore that **“By 2020, 50% of all searches will be conducted via voice.”**¹⁰ In our opinion these predictions are a bit aggressive and should realistically be cut in half. To put this in perspective, Google has stated that 20% of mobile searches come from voice. That means about 12% of **all** Google searches (desktop, mobile, voice) are mobile voice queries¹¹. But, that is growing rapidly with massive smart speaker adoption, and will soon reach the “50%” predictions.

PAID VS. ORGANIC

Organic search is currently the only opportunity for brands to participate in voice search. There are **no paid platforms available to marketers for voice search, but this will almost certainly change soon**. There are indications that Google is already testing voice search ads¹², and there are rumors that they are serving ads for local services and not identifying them as being sponsored¹³. Amazon will most likely begin something similar, although no timeframes have been officially announced. Expect something to emerge in the next 2-3 years.

It is unclear how paid voice search could potentially impact the user experience. Imagine asking a question to a device and the answer being “We’ll answer that question after this short message from our sponsor...”. This could pose a risk to adoption as people are using the devices for quick answers to their questions, not a branded experience or ad. Only time will tell how paid placement will impact the space.

THE ROLE OF “SKILLS”

Today, most marketers likely think of voice search and immediately think of Alexa Skills. As many marketers already know, you can create a branded Skill, and program it to respond to specific questions. The big drawback is that users must “launch” the Skill to interact with it (“Alexa, launch the X Skill”) – a cumbersome act which research indicates most people don’t often do.

Most of the data we have on Skills usage shows disappointing adoption. In fact, there are currently over 60,000 Alexa Skills, but 61% don’t have any user ratings¹⁴. In our audit of Skills deployed by several B2B and B2C brands, we found that the daily active users were typically less than 100.

Google has their own version of Skills, called Actions, but they haven’t been widely adopted. In fact, there are currently only about 4,000 Actions enabled in the U.S., and most of them are games or educational based. They are difficult to find and significant growth is not expected.

Whether the poor adoption of Skills is due to **lack of awareness or poor user experience** is up for debate. Theoretically, strong promotion that highlights a Skill *could* gain traction, but there are no current examples of this type of success. Skills and Actions today are analogous to mobile apps a decade ago. While the utility of apps was clear from the beginning, it is more difficult to envision the same proliferation for Skills and Action in the future.



BOTTOM LINE

We don't see Actions or Skills being critical marketing channels today.

THE 4 PILLARS OF VOICE SEARCH

Voice search breaks down into four basic components:

1. Question Discovery

To succeed with voice search, you must first start with the questions people ask of their digital assistants and devices. What questions would your audience most likely be asking? Brand, corporate, product, industry, and customer service questions are all in play. Identifying the questions most often asked is one of the more challenging aspects of assessing the Voice Search landscape around your brand. Look to your site search and general Google search data for indications of the types of questions people are most likely asking via Voice Search.

2. Answer Retrieval

Our research demonstrates that each digital assistant and device will answer questions differently. Acquiring the individual answers to your questions across all devices is critical. Multiple scenarios should be tested. For example: Do you get a different answer on Alexa if you have a Skill enabled vs. not? Does Google Home give you the same answer as Google Assistant on your phone? How does your location influence the answer?

3. Answer Sources

Different devices rely on different data sources and can become complicated very quickly. Search engines include Google, Bing, and Amazon A9. Often, Google's Featured Snippet (sometimes referred to as "Position Zero") is used as the answer source. This is the block at the top of the organic search results page and includes a summary of the answer extracted from a webpage, plus a link to the page, the page title and URL.

4. Optimization

The low hanging fruit is optimizing content such as FAQ pages, quick answers, informational articles, product pages, and topical pages. But, you can't do that without first identifying which web pages are providing answers on the devices. The way to get a featured snippet is to be the authority domain on a given subject; become a trusted resource by providing good, relevant, fresh content. The ultimate goal is to ensure the right branded answers are being provided across all devices.



OUR RESEARCH & RESULTS

We performed an audit of **more than 50,000 voice queries** covering over **50 B2B and B2C brands**, across **10 industries**. Using our unique platform, we followed the 4 Pillars of Voice:

Question Discovery

Using our knowledge of customer intent, combined with data from SEO & SEM keywords, chat bot activity, and customer support inquiries, we partnered with our clients to identify the top branded & non-branded questions to ask the devices.

Answer Retrieval

Our platform utilizes a programmatic approach to logging the answers being provided across all devices.

Answer Sources

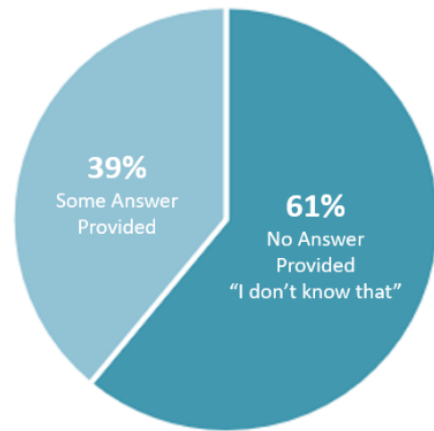
Our platform cross references other data sources to see where the answers are coming from – search engines, ranking positions, or specific URLs.

Optimization

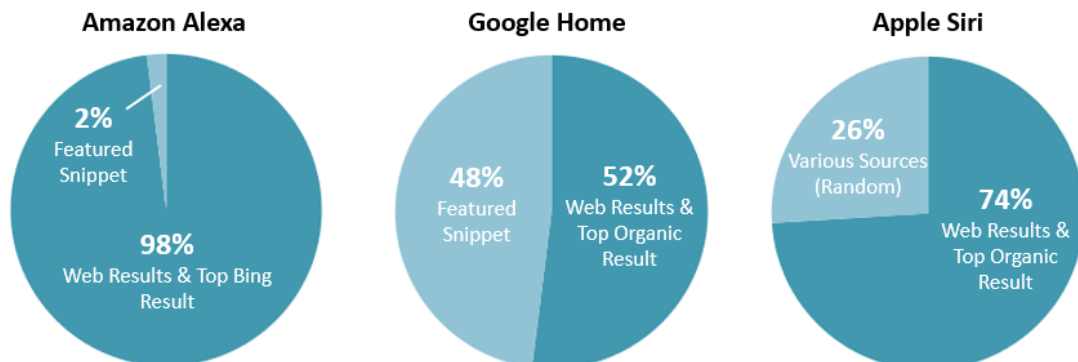
We then pinpoint what actions can be applied to provide the devices with better answers. This can include web page optimization, SEO best practices, developing new FAQ content, and many other techniques.

*We found that 61% of the time the devices **did not provide an answer** to the questions asked. This **included branded questions**. To compound matters, when an answer is provided, approximately **half of the time it is incorrect or out-of-date**.*

*There is tremendous **whitespace** for brands to provide accurate answers and ensure a positive customer experience.*

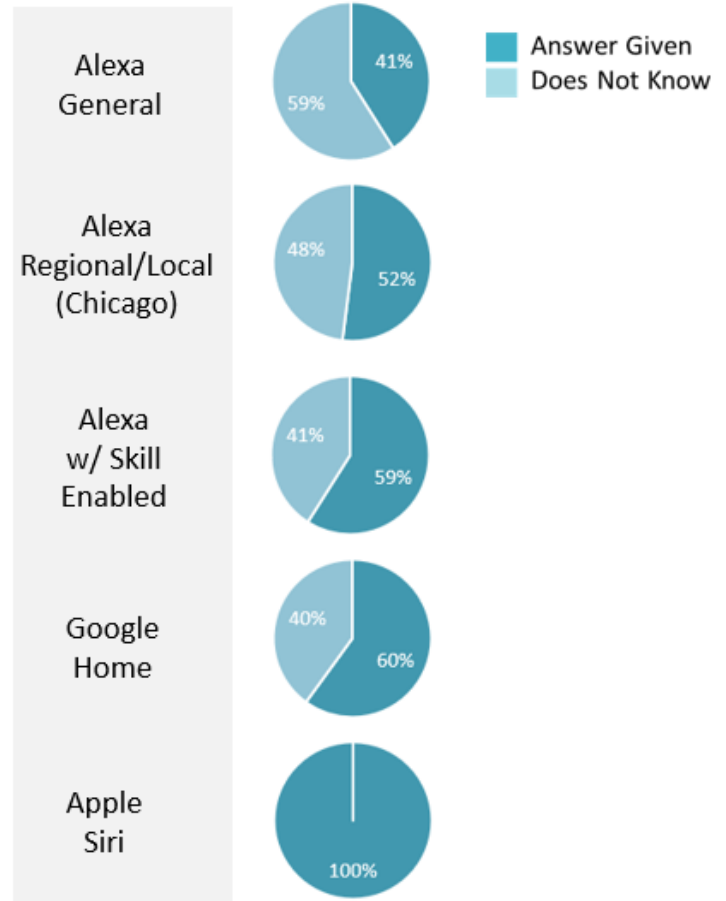


We also observed that each device provides answers from multiple data sources. Approximately half of the devices rely on Google's Featured Snippet and the other half rely on highly positioned organic search results – but those results could come from Google, Bing, or even Amazon A9.



This becomes even more complicated if an Amazon Skill is activated or if you change your location. Overall, we saw that:

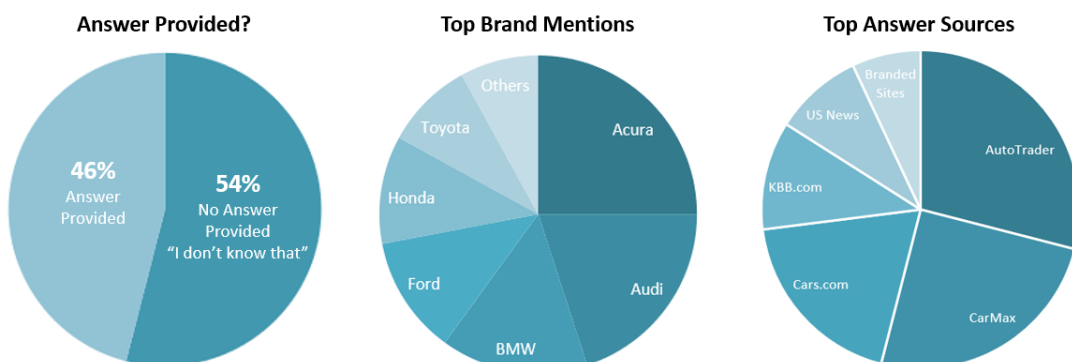
- Alexa had more consistent answers to branded questions when a brand Skill was enabled, even without “launching” the Skill.
- When the location was changed, Alexa gave regional/local results approximately half of the time.
- Google Home provided an answer 60% of the time for both branded and non-branded questions (compared to 41% for Alexa).
- Apple Siri always provides an “answer”, but it tends to be “here’s what I found on the web...” instead of a voice response.
- For branded questions, Alexa would also provide results from Amazon reviews (3%), suggest a Skill (17%), or ask if you wanted to install a Skill (7%).



INDUSTRIES

For our Q2 report, we did a deep dive into the **Automotive Industry**, using more than 3,000 branded and non-branded questions. We focused on Google Home specifically as we don’t believe anyone is using Alexa to buy a car anytime soon. Examples of questions – “What is the best SUV?”, “What is the best mid-size Truck?”, “What is the most fuel-efficient sports car?”.

True to form, Google Home provided an answer approximately half of the time (46%), pulling answers from a variety of Featured Snippets and top organic search results. Some of the top answer sources were AutoTrader.com, CarMax, Cars.com, and KBB.com. Acura, Audi, BMW, Ford, and Honda were some of the top brands mentioned.



HOW TO GET STARTED

1. *Identify audience behavior and Intent*
2. *Understand the answers provided across devices*
3. *Discover the source of the answers*
4. *Make your content attractive to the devices*

LOOKING AHEAD

Now is the time to get in the game. Start thinking about your **2020 Voice Search Strategy**. Develop a Center of Excellence framework that includes pilot programs, content, staffing, standards, process, technology, education, measurement, and governance. Opportunity for brands to consistently deliver the right answers and optimization will be key.

In our next Voice Search Report for Q3, we will share the findings across 10 different industries. The 3 biggest trends to focus on this year are:

1. More devices emerging in the next year. 20+ new devices are coming from all the tech giants – Apple, Facebook, Microsoft, Google, Baidu, Samsung, Alibaba and multiple Chinese brands.
2. Globalization. Google Assistant is available in 52 countries and 30 languages.
3. Amazon Show, Lenovo Smart Display are combining voice and screen to provide an experience more like what consumers get on a mobile phone with combined audio and visual results. We think this is where the future of interactions will be.

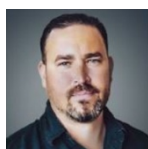
AUTHORS



Jeremy Sanchez,

CEO

Global Strategies



Damien Bianchi,

Practice Lead – Voice Search

Global Strategies

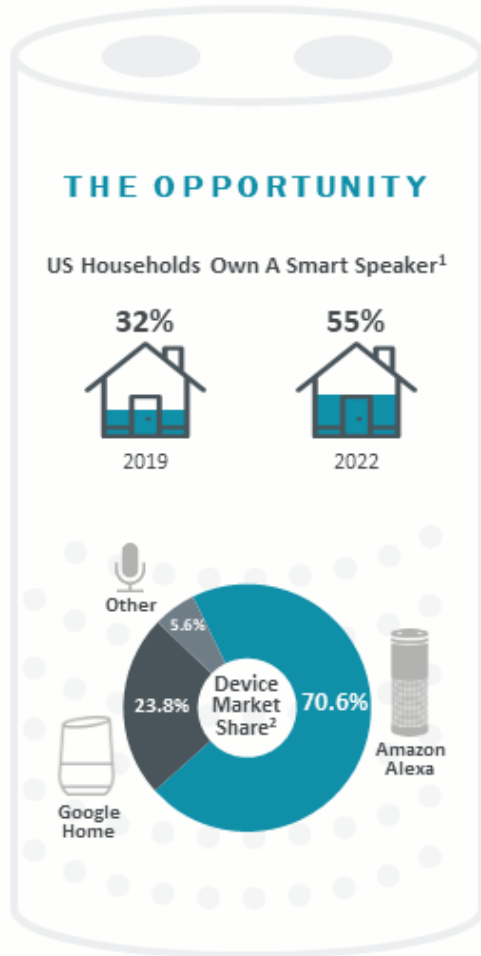
WHO IS GLOBAL STRATEGIES?

Global Strategies is a leading enterprise search and content marketing consultancy. We deliver specialized digital marketing services to global enterprise companies to maximize revenue across search and content marketing programs.

We use our Customer Intent Modeling (CIM) Platform, which utilizes 20+ years of data/insights about SEO & user intent, as the strategic view into the types of questions customers are asking. We utilize artificial intelligence and machine learning to assess the questions and answers across the most popular Voice-Activated Devices and their associated Virtual Assistants. For more information please visit: <https://www.globalstrategies.com/voice-search/>



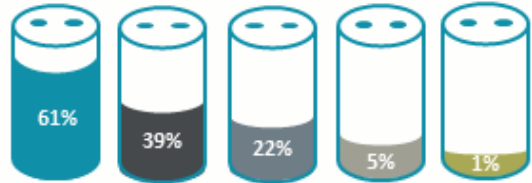
VOICE SEARCH Thinking Beyond Alexa



ARE SKILLS REALLY USED?

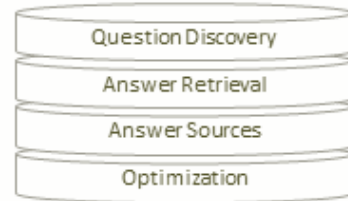
Over 60,000 Alexa Skills³

- Zero Ratings
- >1 Ratings
- >2 Ratings
- >10 Ratings
- >100 Ratings



63% use smart speakers for search⁴

4 PILLARS OF VOICE SEARCH



HOW TO GET STARTED

- 1 Identify audience behavior and intent
- 2 Understand the answers provided across voice devices
- 3 Discover the source of the answers
- 4 Make your content attractive to voice search queries and devices

DON'T MISS THE BOAT



NEXT 18 MONTHS

New devices from Apple, Facebook, Microsoft, Google, Baidu, Samsung, Alibaba & multiple Chinese brands



GLOBAL

Google Assistant is available in 52 countries and 30 languages



COMBINING VOICE & SCREENS

Future of customer interactions = Amazon Show, Lenovo Smart Display

GET STARTED!

We are a **WPP** company and the **only** consultancy that can identify, retrieve and report on **voice search** questions and answers **at scale**.



Contact us today:

voice@globalstrategies.com



globalstrategies.com/voice-search

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