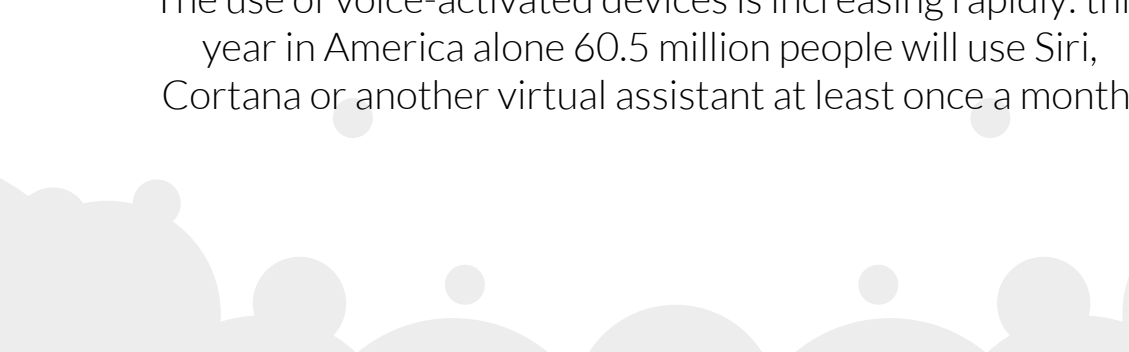


Voice Search

A DIGITAL space race

Brands know they'll have to shoot for the stars if they want to capture consumers

THE USE OF VOICE SEARCH DEVICES IS STARTING TO TAKE OFF

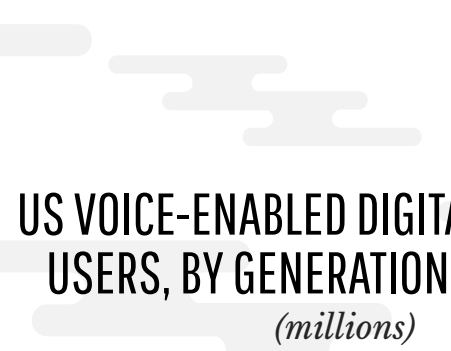


The use of voice-activated devices is increasing rapidly: this year in America alone 60.5 million people will use Siri, Cortana or another virtual assistant at least once a month.



BUT WHY?

Humans can speak at 150 wpm...



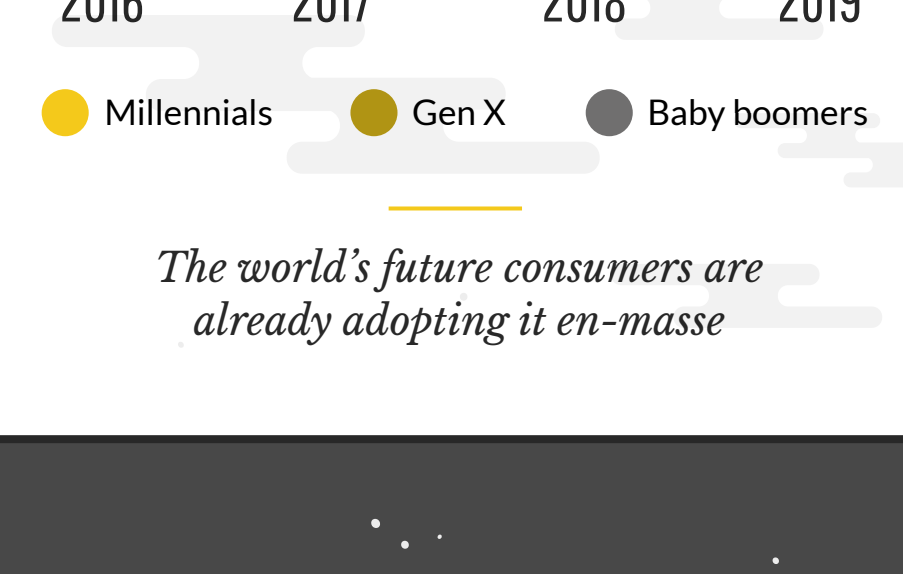
...but only type at 40 wpm

Voice input has the potential to become the most efficient form of computing

People are getting more and more comfortable interacting with virtual assistants

US VOICE-ENABLED DIGITAL ASSISTANT USERS, BY GENERATION, 2016-2019

(millions)



The world's future consumers are already adopting it en-masse

WHAT WOULD THIS LOOK LIKE?

Through an ecosystem of interconnected hardware devices, this technology will really take off.



WHAT ARE TWO FACTORS THAT WILL TAKE VOICE SEARCH USAGE INTO THE NEXT STRATOSPHERE?



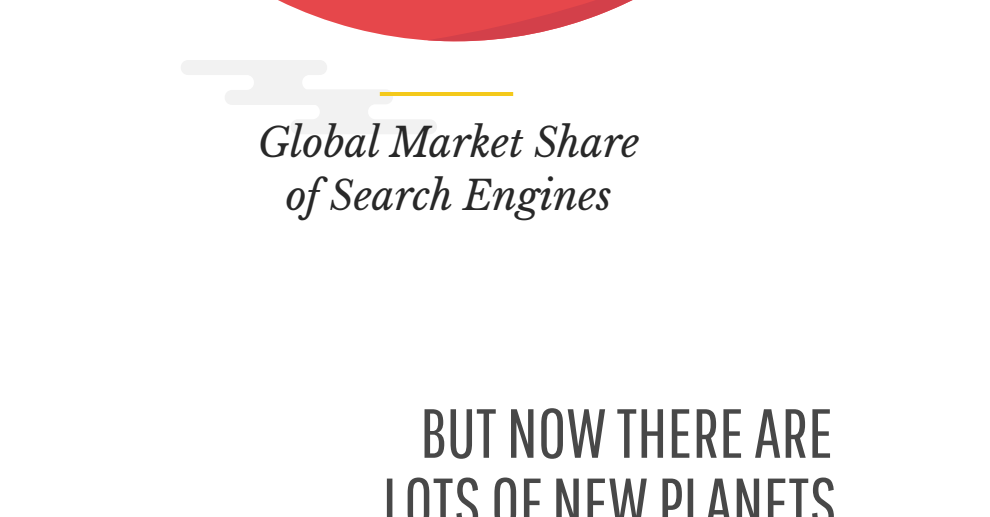
Hardware options that seamlessly integrate into all areas of a person's life



Voice recognition accuracy that surpasses the 99% threshold *

* According to Andrew Ng, ex-Chief Scientist at Baidu

SO WHY DO BUSINESSES WANT A PIECE OF THE (MOON) PIE?



Planet SERPs has already been colonized by Google

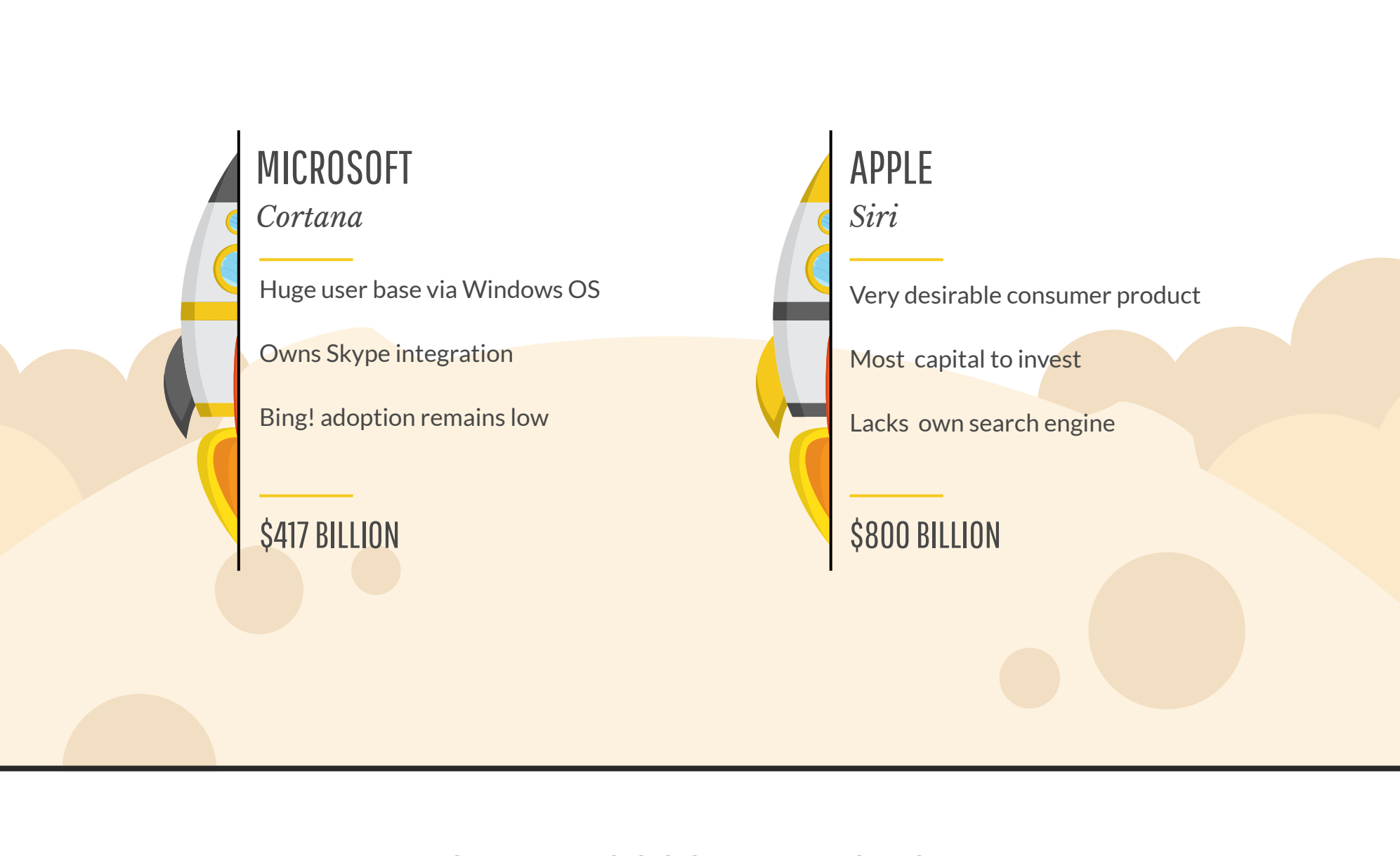
BUT NOW THERE ARE LOTS OF NEW PLANETS...

The provider that procures the most data and builds the most seamless voice search experience across devices may use this as a platform to build a monopoly

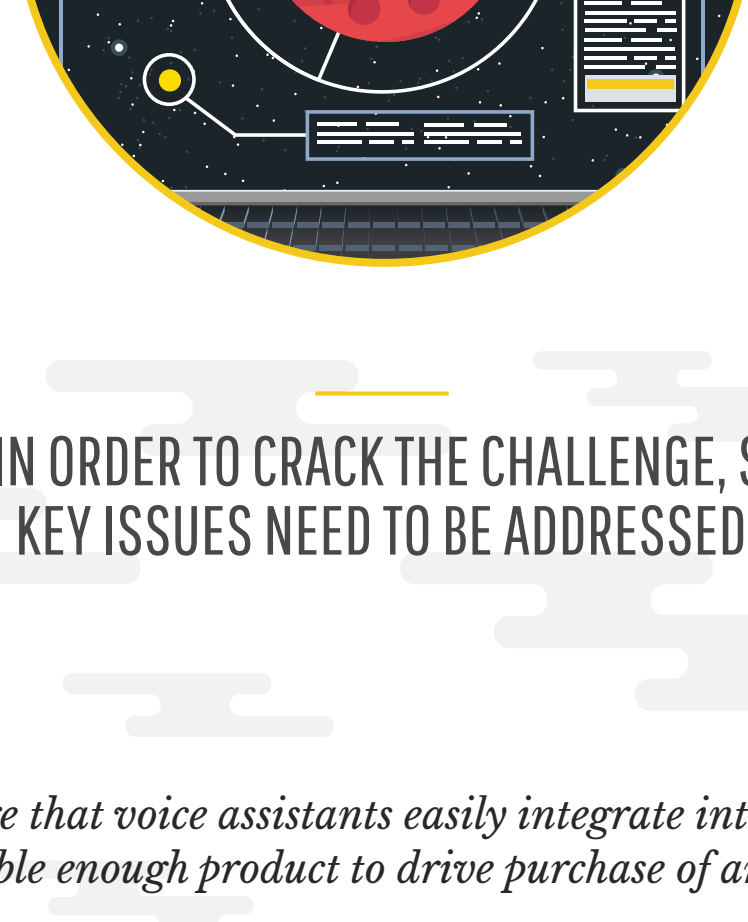
PLANET VOICE SEARCH

Reports by technavio indicate that by 2019 the voice recognition market will be a \$601 million industry

SO, WHO IS LEADING THE SPACE RACE?



AMAZON AND GOOGLE ARE SLIGHTLY AHEAD, BUT THE JURY IS STILL OUT...



BUT IN ORDER TO CRACK THE CHALLENGE, SOME KEY ISSUES NEED TO BE ADDRESSED

INTEGRATION

Providers will need to ensure that voice assistants easily integrate into 3rd-party hardware or create a desirable enough product to drive purchase of an entire ecosystem.

MONETIZATION

Voice Search solutions will need to develop a monetization strategy in order for this to be big business - without alienating or antagonising users.

RISKY BUSINESS

The pressure is on to 'crack' voice-search, but with the technology in its infant stage, businesses will need to carefully avoid privacy or user PR scandals.

BARRIERS TO UPTAKE

Though use of voice search is rapidly increasing, is there a threshold of uptake? Lots of people have deeply ingrained search behaviours that are hard to influence.

HOW DO YOU USE VOICE/DIGITAL ASSISTANTS, IF AT ALL?

