

# DO YOU HEAR WHAT I HEAR?

Why brands have a crucial role to play  
in our voice-activated digital future

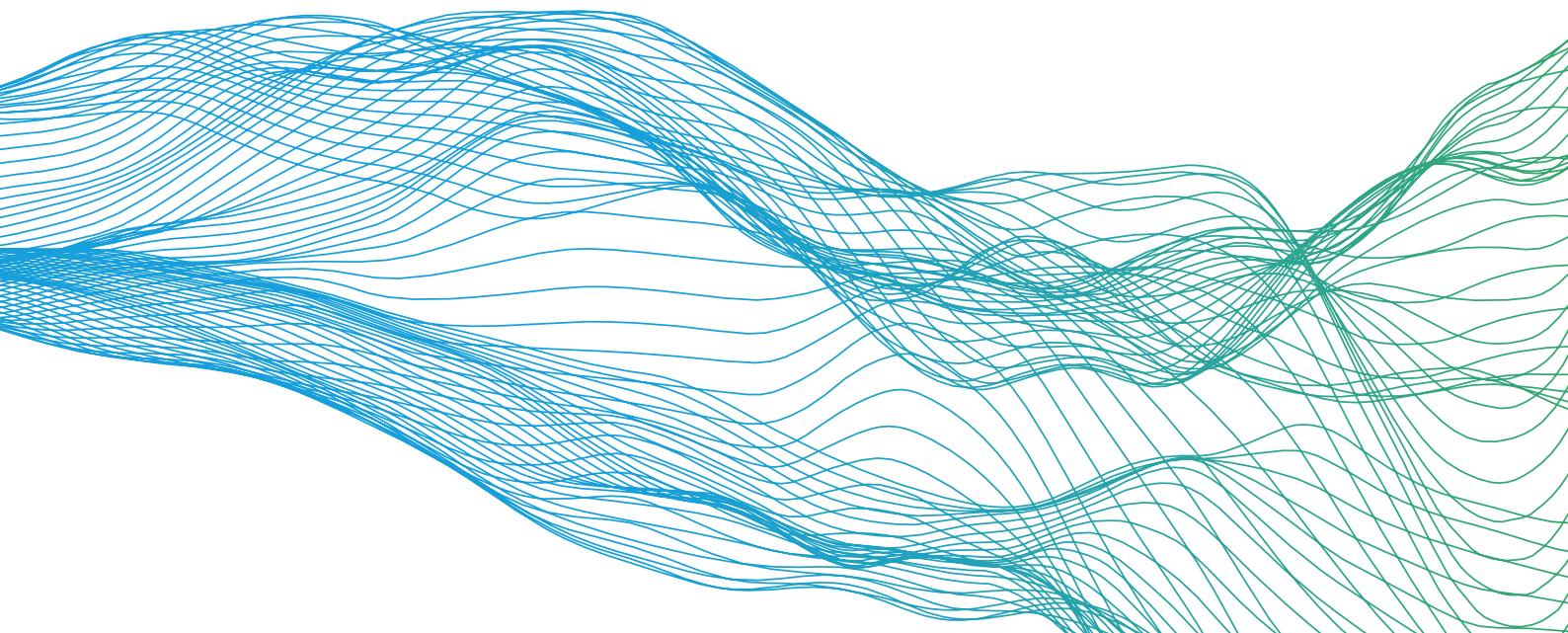
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PART OF THE BAV 2021 SERIES  
BRANDS meet CULTURE

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There's a phenomenon that's occasionally reported by some of the 100 million sets of twins around the world. Even when separated, perhaps by miles or even continents, they simply sense their twin's emotions and feelings. "Twin telepathy" is the stuff of fascinating stories, not established science.

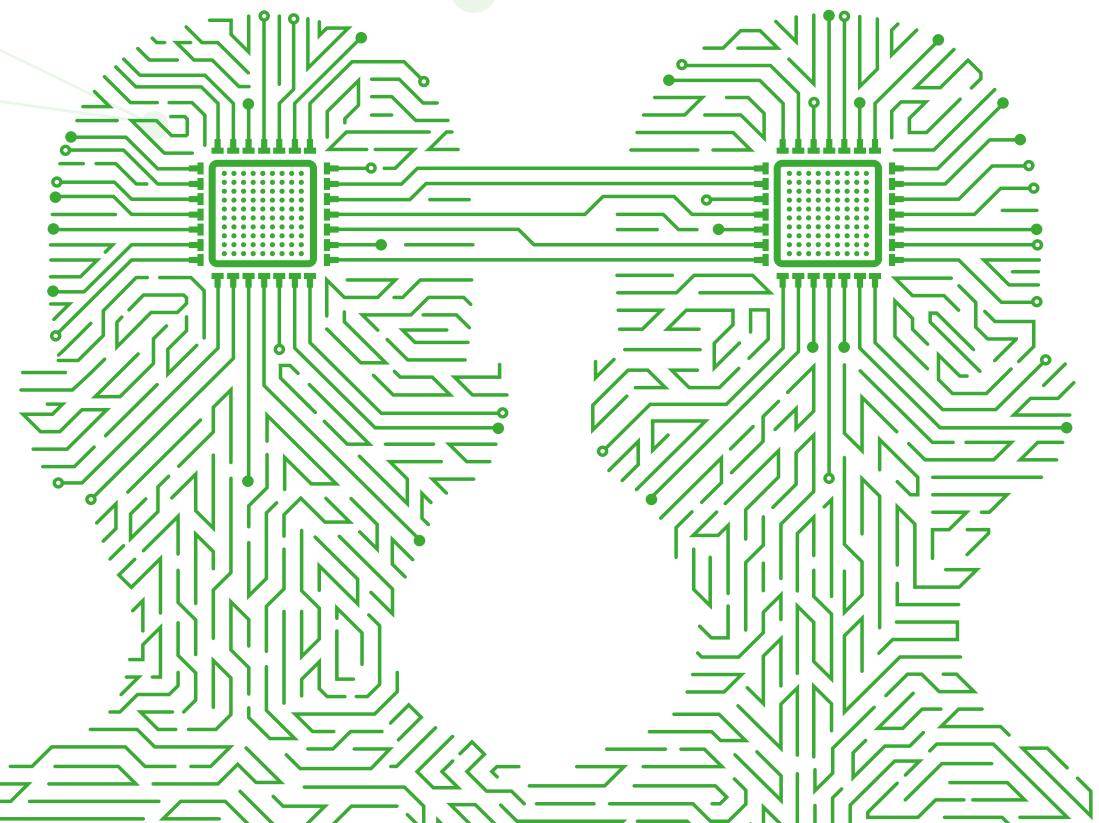
But what if twin telepathy was real and applied to us all? What if we all had a twin who knew everything about us?... Well almost everything... Not just what we're doing right now, but also what we've been doing, what we're likely to do next, and how we feel about it. Someone who knows even before we do what we need and maybe even does it for us in anticipation.

Well, this is not-too-distant a future. And there are already early signs of what's to come.

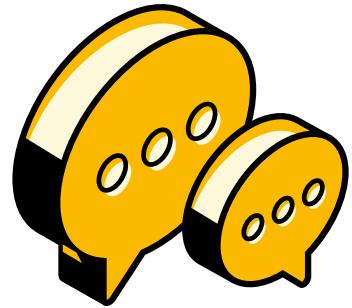
The convergence of ever-greater and even-cheaper computing power, connected devices, edge computing and Artificial Intelligence will, over the next few years, create data versions of ourselves that will be able to make decisions and purchases on our behalf.

Using huge amounts of our personal data combined with data from tens of millions of others, we have the potential to create a digital version of an ideal butler, a Jeeves who anticipates our every need. Our very own "Digital Twin". The democratisation of a "butler for all".

And we will communicate with this twin using the most ubiquitous, natural and low tech of all interfaces – our voice.



# JOIN THE CONVERSATION

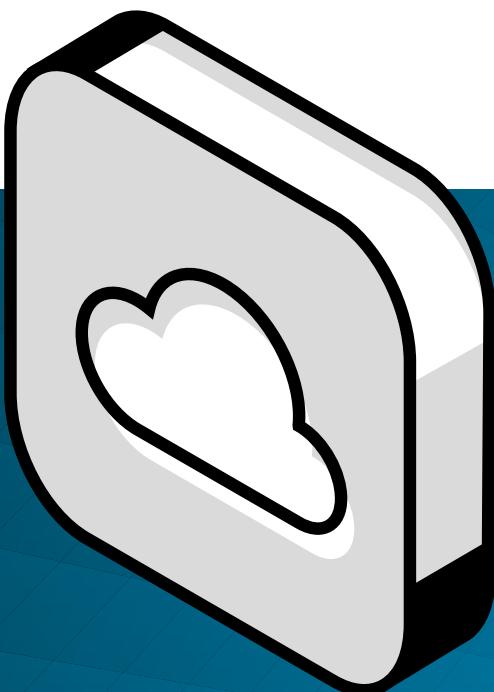


We won't be getting there in one step...

It's back to the future – Voice is fast emerging as the dominant computing interface, and "conversational AI" is what will power our future interactions with our devices, our home appliances, our cars and the products and services we engage with. It will connect us with the entirety of the digital world – some 1.73 billion global websites as of Q4 2019, and more than 26 billion connected devices.

Voice will be the way we engage with brands on multi dimensional levels. It's impact will be profound.

To get some idea of the scale of the potential, consider the growth of just one section of the conversational AI market – that of smart speakers. Measured by consumer adoption, the smart speaker has been the fastest-growing device in consumer electronics history.



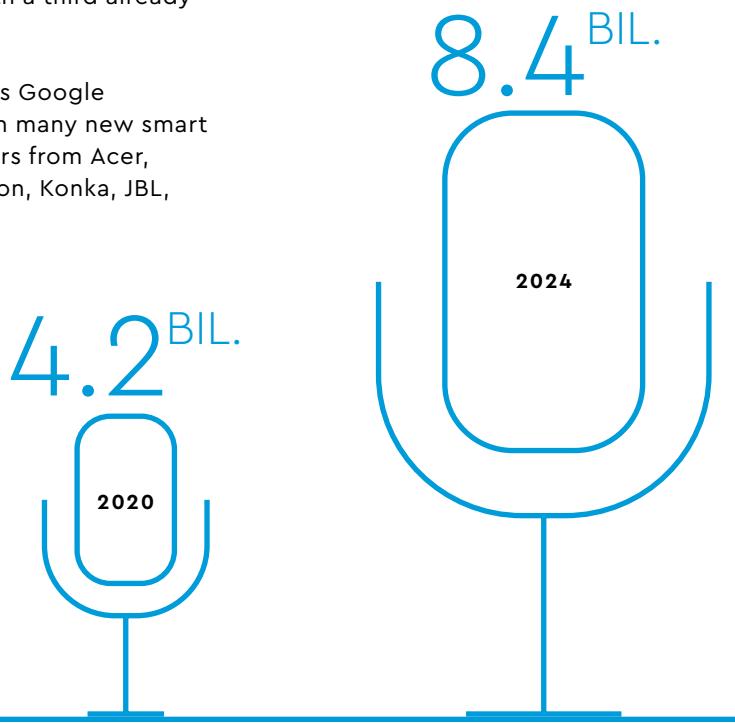
The rate of growth is little short of explosive: in Q4 of 2019 alone, Canalys estimates the global smart speaker market grew by 52 percent. The last quarter of 2019 saw all five top vendors, Amazon, Google, Baidu, Alibaba and Xiaomi, break their all-time best shipment records.



If you look at the voice platform ecosystem, currently it's very bipolar. In the US, it is Google and Amazon and Apple. But if you look at Asia, it's Chinese dominated. The biggest players being Alibaba and JD.com although a number of Japanese car companies are currently investing in voice technology.

But conversational AI is not just about smart speakers. In the US alone, there are almost 130 million users of in-car voice assistants, and it's estimated around half of US adults have tried using a voice assistant while driving, with a third already regular users.

Google announced at the start of 2020 that its Google Assistant will soon roll out and be available on many new smart displays, speakers, headphones and sound bars from Acer, Aftershokz, Anker, Belkin, Cleer, Harman Kardon, Konka, JBL, Lenovo, Philips, Seiki and LG.



A study by Juniper Research suggests there will be 4.2 billion digital voice assistants (DVAs) in use globally by the end of 2020; and that figure will reach 8.4 billion in just four years' time.

But we believe that smart speakers will be just a small part of our voice-activated future. Voice activation will be built into so many of the devices around us that we will become used to simply talking, whether that's to our cars, kitchen appliances, wearables or hearables, often using voice and screens at the same time with a seamless flow of information and voice between the two.

But it's the smartphone that, for the foreseeable future, will be our primary tool for accessing a voice-enabled world. The smart speaker is nothing but a gateway drug – introducing people to voice. It will be seen as a device that the early adopters got to influence the household. Ultimately though, it's going to be much more multimodal through TV, in the car and your smartwatch.

The smart speaker may well go the way of standalone sat-nav devices, which were an essential stepping stone towards the use of smartphones for navigation, but are arguably now passed their sell by date, their function being consumed to a more convenient device.

# WHY IS VOICE TAKING OFF?

Because it's quicker, easier, and more natural than tapping on a keyboard – and you can do it more safely while walking or driving.

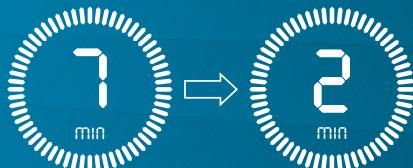
We humans have been speaking to each other for much longer than we have been bashing keys on the QWERTY keyboard or tapping on a smart phone or tablet. It won't be too long before we remember the sound of a fax machine or keyboard as being a blip in history.

Instead they will be replaced by natural conversation, how more natural is that?

Most of us can speak three-times quicker than even the fastest of us can type. Voice control does away with the need to reach for a device, unlock it, open an app, and then tap various selections. With voice, the whole process can and will be seamless and virtually effortless.

## THE ROAD TO THIS IS CLEARLY VISIBLE TODAY...

When Virgin Trains in the UK launched a service that allows customers to reserve tickets through Amazon's Alexa, it reduced average booking times from seven minutes to two.



These advantages of voice are clear to consumers. Research by Adobe last year found voice is already widely used on smartphones for general web searches, seeking directions while driving, making phone calls, sending texts, checking the weather and instructing a device to play music.

# LOVE TO CHAT



Elizabeth Cherian, EMEA Director of Wunderman Thompson (WT) Intelligence, points out that WT Intelligence research carried out just three years ago found that 68 percent of smartphone users around the world thought the idea of tech that talked back to them was exciting.

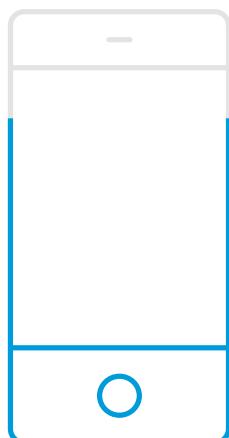
WUNDERMAN THOMPSON

73%

"For many, then, voice tech was only a pipe dream," says Cherian.

"Fast forward to 2019, and Forrester reported that there were almost one billion Google Assistant-enabled devices and 500 million-plus Siri-enabled devices globally."

But there's a difference between simply using technology and loving it. And, on the whole, consumers really do love it. In fact, Kantar has found that 88 percent of global voice tech users believe that when voice technology works properly, it's "magical", and almost half of regular voice assistant users say they love their voice assistants so much they wish they were a real person.



**As the technology improves, usage will rapidly accelerate. Wunderman Thompson research in collaboration with Mindshare shows that globally, 73 percent of all smartphone users say that if voice assistants could understand them properly and speak back to them like a human, they would use them all the time.**



The coronavirus pandemic has only increased the appeal of voice on a global level. Contactless communication, whether via no-touch smart cards or voice-controlled lifts like those being installed in China, have suddenly become so much more than just a novelty – but an integral part of making consumers feel safe in physical environments.



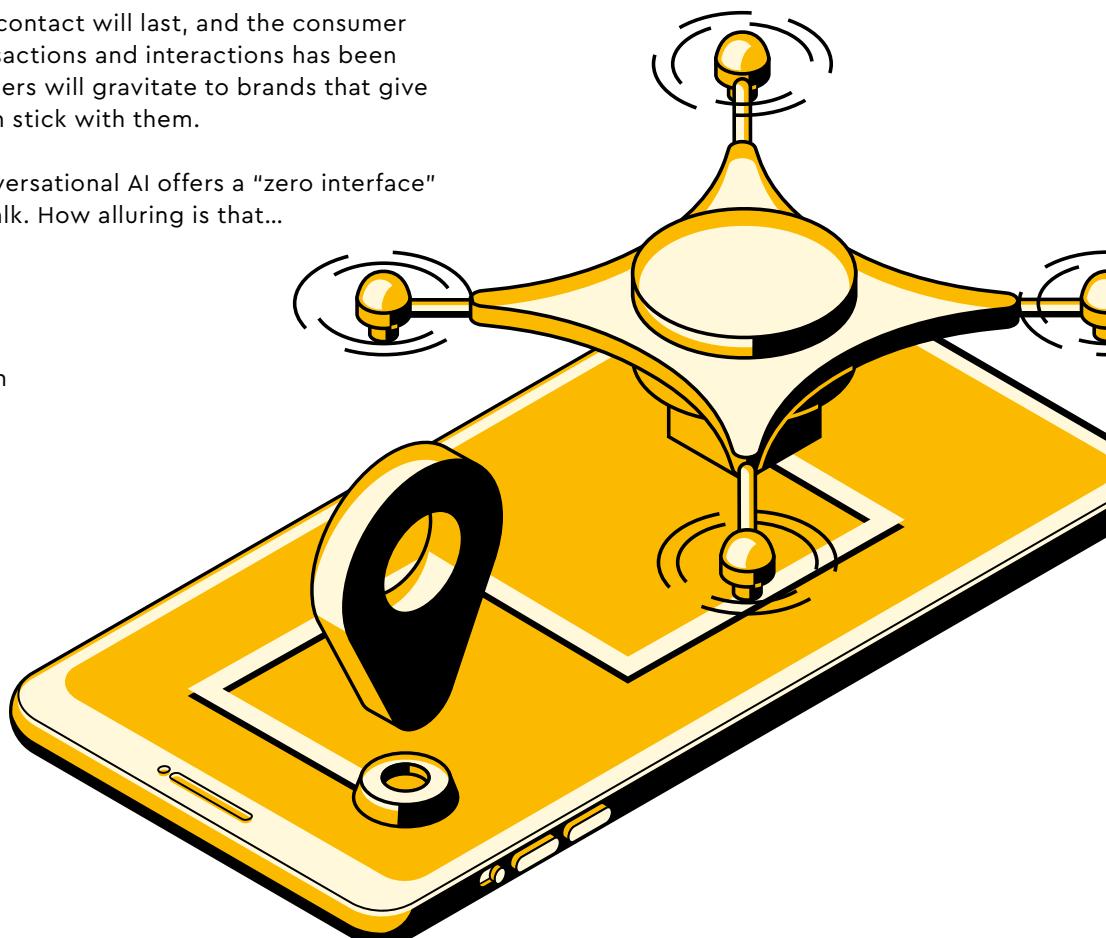
## NO-ONE WANTS TO TOUCH ANYTHING UNLESS IT'S SOMETHING THEY OWN AND THEY KNOW WHERE IT'S BEEN.

Douglas Baker, Vice President, Industry Relations with FMI, America's food industry association

This desire to limit physical contact will last, and the consumer desire for faster, easier transactions and interactions has been accelerating apace. Consumers will gravitate to brands that give them voice options and then stick with them.

AI-voice interactions or conversational AI offers a "zero interface" with the internet. You just talk. How alluring is that...

Because of its ease of use, convenience and soon ubiquity, AI-voice interaction will undoubtedly re-shape communication, buying behaviour and consumer shopping journeys. Gone will be the need for passwords, app downloads and URLs to access the internet. And no more waiting on hold to access information held captive in call centers. Instead, personal data security will come from technology that is effortless for the consumer, such as face or voice recognition.



GG

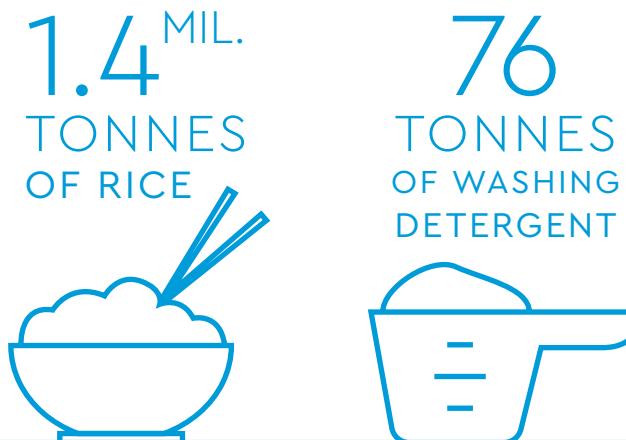
**TO PUT IT IN A  
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**EVERYTHING WILL  
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**YOU DON'T GET  
BIGGER THAN THAT.**

# A SHAKE UP FOR BRANDS

The opportunity and challenges for businesses are going to be as immense as they are profound.



In 2019 in China, the 11.11 Global Shopping Festival (Single's Day Sale) brought voice to center stage for the first time. More than a million voice orders were placed and paid for using the Tmall Genie smartspeaker, as consumers snapped up and paid via voice, amongst other things, 1.4 million tonnes of rice and 76 tonnes of liquid detergent in just 24 hours.

These numbers are big, but in terms of sophistication, it's still early days. So, how long will it take for our concept of a Digital Twin to become a reality?

Progress will come, broadly speaking, in three stages. Whilst these three stages represent profound technology and capability inflection points, the shifts between them will be almost imperceptible to consumers, who will simply notice clunky Q&As gradually giving way to sensible and increasingly sophisticated, useful, entertaining, frictionless and intuitive conversations.

But behind the scenes many forces, technology trends and innovations will be hard at work. What will be happening is this:



# STAGE 1

We will move on from the current stage of voice recognition and fairly basic conversations, which draw on natural language programming (NLP) to enable the voice assistant to interpret colloquial speech and multiple accents.

# STAGE 2

Which we are beginning to open the door of now, this will see a ramping up of Artificial Intelligence which, in combination with NLP, will do away with robotic command-and-response interactions.

This now gets more useful to consumers and brands and more spooky...

As the intelligence aspect of voice technology becomes more sophisticated, more natural-feeling conversations will start to happen, and voice assistants will be able to offer tailored suggestions and make ever-more-informed recommendations. "Contextual remembering" will start to happen, meaning assistants pick up where they left off before, and take account of previous discussions, in much the same way as two people meeting for the second or third time don't need to go through the same "getting to know you" conversations on every occasion.

# STAGE 3

This is when the magic truly happens. When the voice-recognition element of the technology pales in comparison with the role of Artificial Intelligence in a voice-enabled world. At this stage, voice assistants will be able to recognise detailed nuance in speech patterns. They will be able to measure not just actions but intentions, as well as detect emotional states and even potential health problems. Amazon has already patented technology that allows Alexa to analyze users' voices to determine their physical and emotional condition. This third stage – and with it, the birth of the Digital Twin – is still some years away, but the Twin is already gestating.

Brands thinking that they'll wait for stage three and the advent of the Digital Twin to materialise before adapting to a new era of AI voice would be like saying 20 years ago, "Why would I invest in these funny website things, ill wait and see what happens?"



# THE REALITY WILL BE THAT VOICE WILL BECOME PEOPLE'S PRIMARY MEANS OF INTERACTING WITH THE DIGITAL WORLD AND THE WAY CONSUMERS WILL INTERACT WITH BRANDS. THIS WILL BE THE NEW ERA OF TRUE "CONVERSATIONAL COMMERCE".

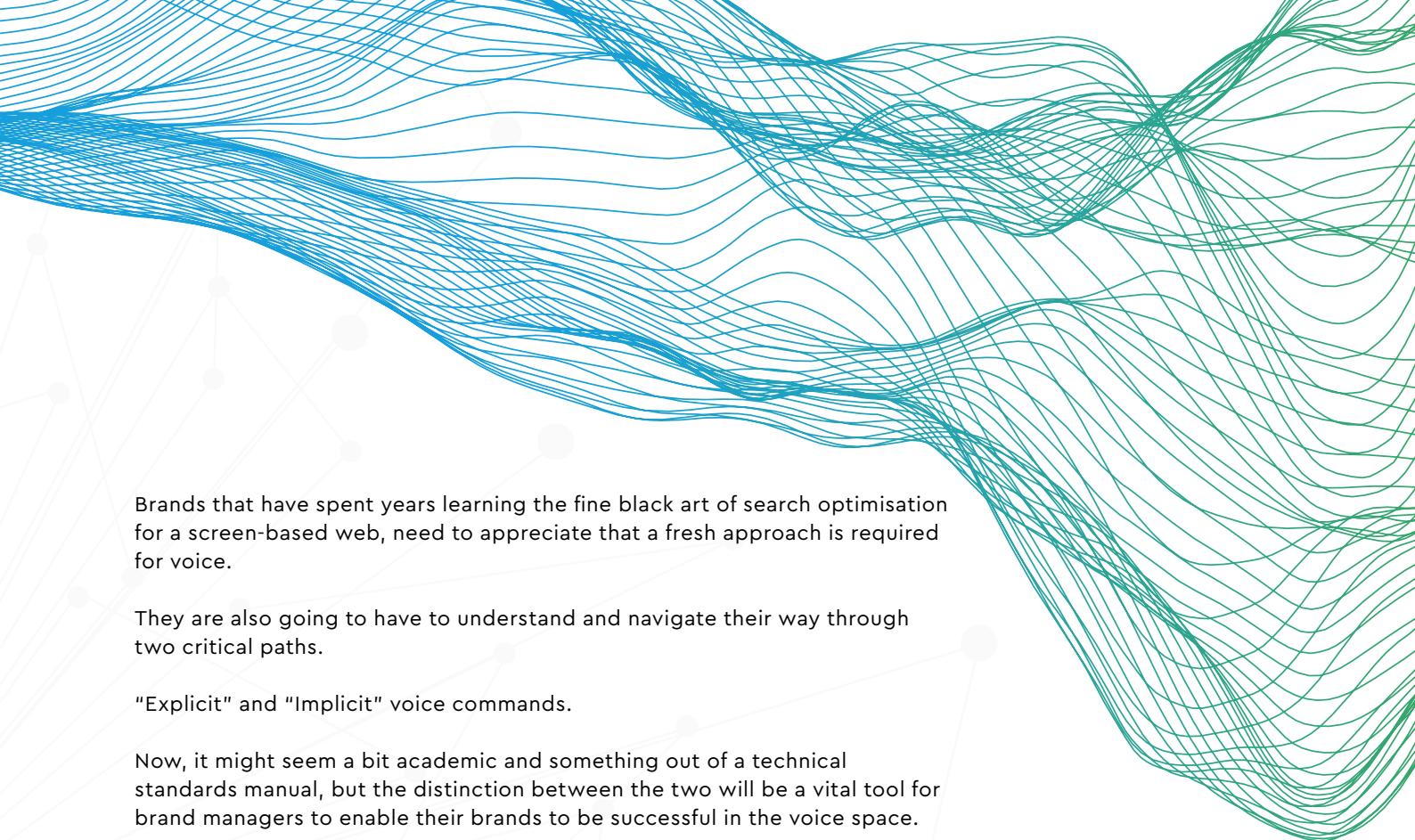
As consumers increasingly embrace this technology, smart brands should be – and many brands are starting this journey – exploring how to be part of the conversation.

Being an early mover in a voice-activated world is essential given its implications for the way people discover, browse, consider and make purchase decisions. One of the seminal lessons from the early adopters of technologies in retail and brands over the past few years has been that experimenting early has given them a commanding lead and sustainable competitive advantage. There is no substitute for experimentation and learnings

to find out what works and what does not for your organisation and consumers. Early knowledge allows you to create strategies and implementations faster and cheaper with inbuilt commercial advantage.

Once a voice assistant has learned its owner's preferences for, say, a type of cheese or a specific brand of toothpaste, that's the one it will offer (or buy automatically) when it's asked to order cheese. There'll be no necessity for brand names to even be mentioned, no need to browse a list of what's available – and therefore no opportunity for a rival brand to even be considered. Those brands

that become "the chosen ones" will gain immensely from locked-in loyalty. Those that are locked out will find it a huge struggle to break through. In fact, it is because voice is so seamless and fast that it will default to only offering an extremely limited number of highly relevant results. On a screen, we can quickly scan a list of search results with ease, but in a voice-controlled world, no one is going to have the stamina or inclination to listen to a long list of options, whether they're for driving routes, the specification of cars you might be considering buying, or special offers this week on Gorgonzola.



Brands that have spent years learning the fine black art of search optimisation for a screen-based web, need to appreciate that a fresh approach is required for voice.

They are also going to have to understand and navigate their way through two critical paths.

"Explicit" and "Implicit" voice commands.

Now, it might seem a bit academic and something out of a technical standards manual, but the distinction between the two will be a vital tool for brand managers to enable their brands to be successful in the voice space.

## EXPLICIT



An **explicit** voice command or voice question is when you ask your device a question that names a brand or specific product. Something like "Take me to Target", or "I'd like to go to Duracell batteries". It may not just connect you directly to that specific brand but may – in a standards-based world – enable you to have a private one-on-one conversation between you and the brand.

## IMPLICIT



An **implicit** voice command or voice question is one that's more about a specific product category or a something with a much more general intent. "Where can I find the best deal on AA batteries?" It turns brand decision-making over to a search engine or hosting platform, depending on the specific platforms substitution and SEO rules, and the platform's agreements and position on the acquisition and analysis of data.



Of course these issues of implicit vs. explicit are certainly not new for brands; it's at the heart of internet search. The relative dominance of implicit search is why Google has been able to monetise search, and how Amazon has developed such a profitable private label brand business.

But what voice will do is amplify and accelerate them. It amplifies in that there isn't a second page and may not be a second listing for the implicitly searching consumer. When patience is measured in seconds, even milliseconds, it is quite unlikely that any UX designer will suggest a verbal listing of options. And, when it amplifies, it also accelerates brand gain or brand loss.



For brands, this demands the ability for voice to be multi-modal – i.e., voice for asking a question – especially search, but the optionality of screen for the answer.

Keeping in mind that, on average, we can talk 3X faster than we can type, but we can read 2X faster than we can listen.

But although much voice will be multi-modal, there will still be screen-free voice in the car, the current #2 voice device behind smartphones, and eyes-free voice in the kitchen.

There will be new techniques involved in ensuring that your brand is amongst the first results but the pressure will be more intense than ever to get to the top of that list. Brands need to be first or second, because everyone else will be nowhere. The rules of shopper marketing in a voice world will change profoundly.

In the increasing "nano" moments of shopping where more decisions are being made via the smartphone, voice interactions will be a critical component to win in those nano moments.

Voice also offers huge potential to enhance the physical shopping experience. FMI's Douglas Baker sees touchless transactions and micro-fulfilment as big growth areas as consumers' mobile phones are linked with in-store tech.

"I'm in-store and can't find an item," he explains. "I can type in a query on my phone, but voice removes that friction. You can ask, 'where's the ketchup at?' and get the response 'it's in aisle six'."

MOBILE PHONES WILL BE AT THE HEART OF THE DEVELOPMENT OF CONVERSATIONAL AI BECAUSE IN ORDER FOR VOICE TECHNOLOGY TO BE WIDELY ACCEPTED BY THE PUBLIC, WE WILL NEED TO USE A DEVICE WE'RE ALREADY COMFORTABLE WITH AND SOMETHING THAT CAN BE USED WHILST ON THE MOVE.

# GETTING PERSONAL

Because online commerce will grow increasingly conversational, this will make it far more human-like. It will become contextual and personal. And this means it can be used across the length of the commerce journey to purchase; it will stretch from search to purchase, to post-sale support, and include opportunities for evaluation and comment. Welcome to the new world of "true conversational commerce".

Many supermarket brands have been quick to realise the potential of voice to automate, personalise and make smart the shopping experience. Tesco supermarket in the UK, for example, partnered with If This Then That (IFTTT), a platform that joins up different online accounts, and which allows shoppers to set up actions like "if it's going to be warm tomorrow", then "buy beers", or "If an item reaches a certain price point, just buy it!".

But the growth and development of voice assistants should not just be about getting to the "buy" command quicker. Done well, their role is to strengthen a brand's relationship with its customers. Brands have always worked to project their personality and their "tone of voice". Now they can and must do it quite literally.

Brands can offer product usage tips and hacks, be a source of entertainment, perhaps with podcasts, as well as shared customer feedback and information. All of which personalise the brand experience. Supermarkets might, for example, suggest seasonal recipes and then offer relevant products.

Convrg, the Los Angeles AI-voice and messaging company now part of Indian intelligent voice platform Haptik, developed an interactive voice-based trivia game, with snippets of music news, and sound-bites from artists for the The GRAMMYs. And for Estēe Lauder, it developed a voice tool that offered product recommendations along with guided meditation.

Brands that define their voice and adapt to a voice-controlled digital universe can create deeper relationships with consumers through more bespoke personalisation.



In many ways, voice technology also promises to deliver next-generation market research to brands, because it is as much about listening as it is about talking. The rich seam of data that voice interactions generate will serve as a round-the-clock always on focus group, without the one-way mirror. An invaluable and largely unfiltered window on people's real lives, in real time – with their permission, of course – will enable brands to create the kind of intimacy with consumers that they crave.

The aggregated data generated by natural conversations, when crunched by AI tools, promises to be transformational. It will generate rich consumer insights that can then be deployed at group, cohort, and individual levels. In short, it will give brands the opportunity to engage more deeply with consumers through real, informed conversations.

And the data suggests consumers are ready for this – 83 percent of consumers are willing to share their data to create a more personalised experience,

according to research from Accenture; and 89 percent of digital businesses are now investing in personalisation, according to Forrester.

Brands have the opportunity to go beyond merely being noticed, remembered and then purchased. They can become indispensable, fundamental to the consumers lives and offer better services because they are able to understand their customer as never before.

Brand-related content ranging from "how to" help to "entertainment" can be requested, offered, served and possibly even shared via voice. Imagine an airline or hotel brand offering language lessons to help travelers prepare for their next trip. A news brand could be the source of podcast-style documentaries that go "behind the news". A personal care brand could offer tutorials on home hair colouring or skincare regimens tailored to the people in a household. A restaurant chain or food brand could give home cooks a time-saving "tip of the day".



**THE LIST OF WAYS BRANDS CAN PLAY A MEANINGFUL ROLE IN THEIR CONSUMERS LIVES VIA VOICE IS INFINITE. WHERE THE POSSIBILITIES ARE INFINITE THE ART OF SUCCESS WILL BE IN THE CHOICES MADE. CONCENTRATING ON WHAT IS MOST RELEVANT TO THEIR CUSTOMERS AND WHAT VALUE THEIR CUSTOMERS PLACE ON THEM WILL BE KEY.**

# WHAT IS RIGHT FOR THE BRAND?

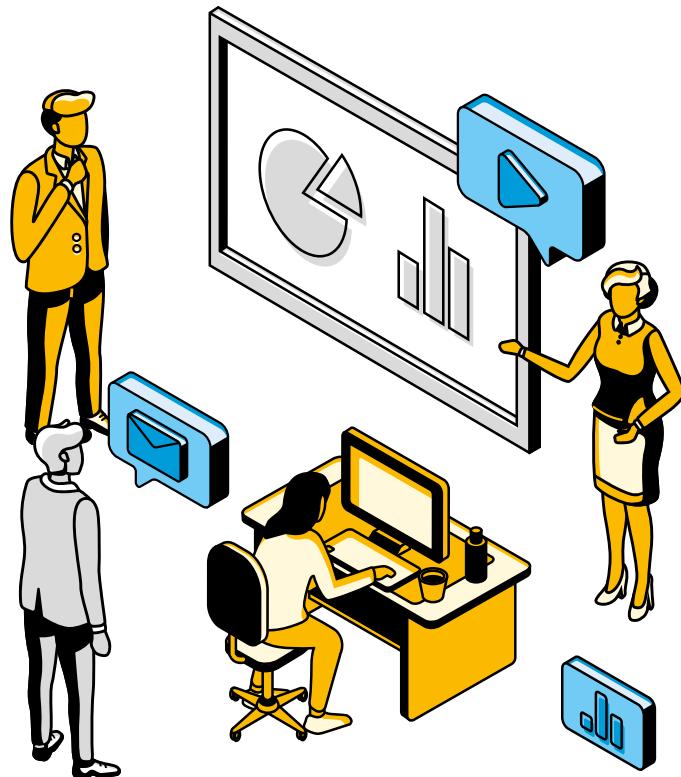


As important as the choices made in terms of where voice can be used, what matters is that the content and its tone of voice – quite literally, is right for the context – and that it's right for the brand.

Innocent smoothies offered, via Twitter, a daily reminder of what day it was for consumers who might have been losing track of time during the COVID-19 lockdown. While that same idea might have seemed patronizing from some brands, it was an endearing message from Innocent and a good match for its not-too-serious persona.

According to Abhishek Suthan Chief Executive Officer of pulselabs, "A lot of voice devices are communal devices especially smart speakers with many being located in the kitchen. Shopping lists are a major component of usage. With household members continuously adding items to that shopping list through the week".

Here lies the challenge for brands. Ensuring households speak the brand name for inclusion onto the list rather than the category or just a generic for whoever then does the purchasing. And not just for the home...for the work environment as well...



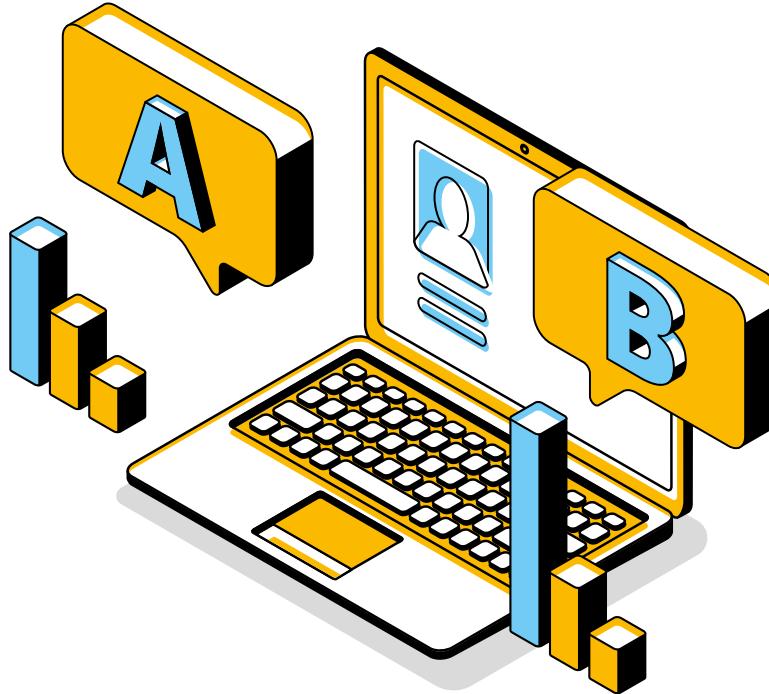
Just as voice assistants have the potential to become the co-ordinator of household decisions – synthesizing everyone's take on what should be tomorrow night's dinner, or a suitable birthday gift, they will also have powerful workplace applications.

There will be hundreds of thousands of enterprise level AI voice assistants.

At their optimum the office virtual assistant promises to combine the role of receptionist, project manager, chief of staff and intern. Managing multiple conversations, taking notes, making recommendations and scheduling the next conversation. Again, there will clearly be ways in which brands can play a role, whether that's by promoting boardroom lunches or providing useful sponsored or branded content.

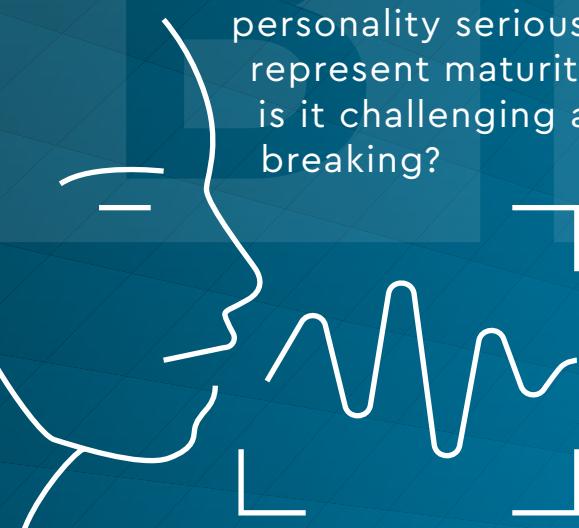
# NEW SKILLS REQUIRED

This may mean creating new roles within the company, or consulting outside it; but a fundamentally new approach is needed – as voice represents nothing less than a fundamentally new way of speaking and engaging with customers.



## SO WHERE DO YOU START?

A vital first step for any brand is to find its voice – quite literally. The right sound and the right tone of voice to encapsulate the personality of the business. Is that personality serious, or fun? Does it represent maturity and tradition, or is it challenging and ground-breaking?



One iconic brand finding its voice is the UK's public broadcaster, the BBC, which has launched a voice-activated service named Beeb that helps people choose BBC content and stay up-to-date with the news.

Elizabeth Cherian observes that The BBC have elected to assume an approachable, friendly voice, which reflects the organisation's own brand attributes, like accessibility and helpfulness. And keen to take a stand on gender stereotyping, the BBC have chosen a male voice when many other brands in the voice assistant space 'choose' female ones.

"The sound of a voice assistant is now widely recognised as having a powerful effect on the listener's perception of a brand, and this certainly goes beyond simply deciding between using a male or female voice."



Marion Sardone, Senior Content & Character Designer of the Intelligent Personal Assistant at BMW, Germany, warns the process is not simple.

"It's obvious the voice needs to fit the brand; for example, a school person's voice wouldn't match a premium, performance automotive brand," she says. But brands should not just adopt a voice based on the fact it's liked, or that it's the voice of a famous actor from a favourite movie, she advises. A more nuanced approach is needed.

"It really needs to fit so that it's a holistic brand experience across all the touchpoints the customer comes across," Sardone says. The German word 'kopfkino' – cinema of the mind – is appropriate, she suggests. In short, the voice must fit the image of the brand the consumer already has.

This is because people's ideas about what's "real" start to become a little fuzzy as artificial intelligence becomes increasingly smart – and has a voice. Research by Google has found that people often see voice assistants as more akin to another person or friend, and people are starting to engage, even now, with voice-activated technology as if it were human.

41%



**Google found that 41 percent of people who own a voice-activated speaker said engaging with it feels like talking to a friend, and they interlace their instructions with "Please", "Thank you", and even "Sorry".**

All this is complex. And it means that brands operating multi-nationally would be unwise to establish a "voice" and then simply translate its speech patterns, tone and other characteristics into other languages.

The way in which we communicate across the globe is not equivalent. There are different expectations of politeness, differences in how and when we say "please" and "thank you", and lots of variations in how we say "you", and so on.

"In Germany, for example, we don't do small talk," Sardone says. "But that doesn't equate to being impolite." Recognising all of these subtleties is a big effort, but a vital one.

Wunderman Thompson research shows that people have strong, preconceived notions about what a brand should sound like, so brands need to navigate this space with the utmost care. Hit the right notes and you can be music to your customers' ears.

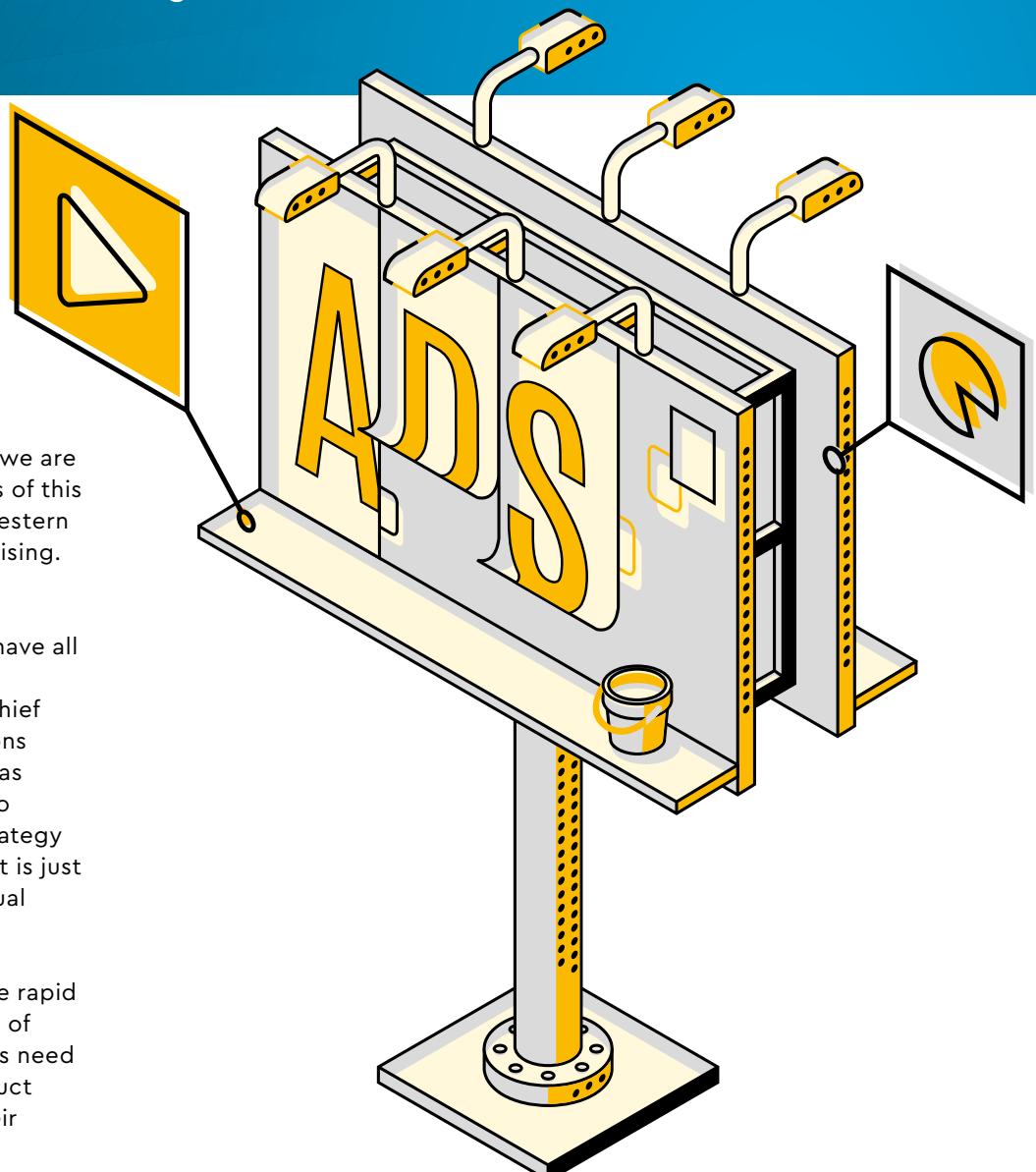
# NOW IS THE TIME FOR THE SOUND OF MUSIC...

Just as brands gradually warmed to the idea of online advertising and e-commerce, many are now looking at "sonic branding" that often begins with the development of a distinctive sound – like an audio logo – that can be associated with the brand. Think of the Intel series of "bongs" that have accompanied its advertising for decades.

In terms of voice advertising we are very much at the early stages of this as neither of the two major western platforms allow direct advertising.

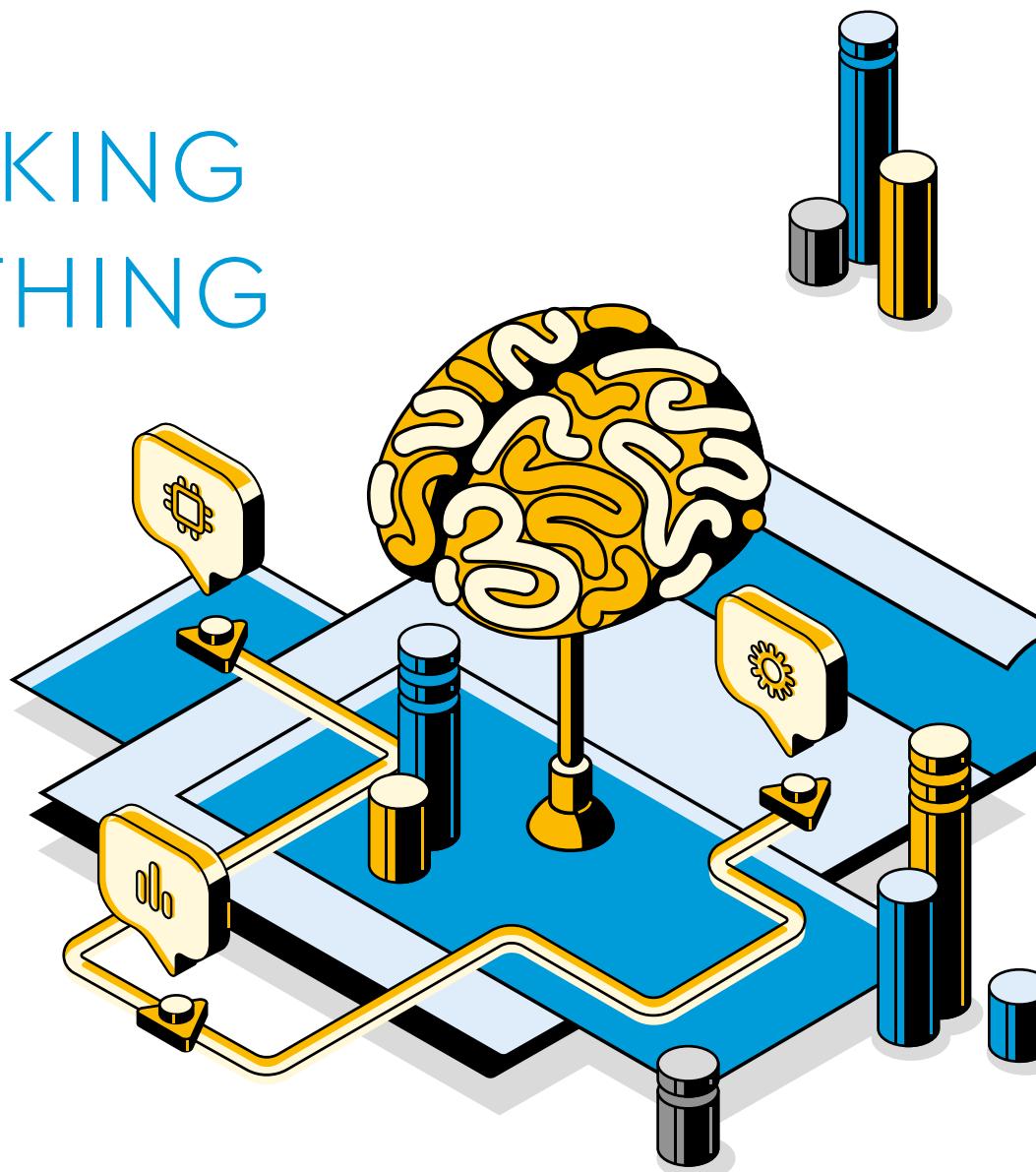
Brands from Warner Bros to Mondelez, Pandora to HSBC have all developed their own sound strategies. As Mastercard's Chief Marketing and Communications Officer Raja Rajamannar said as Mastercard launched its audio brand last year, "An audio strategy is no longer a 'nice to have'. It is just as important as a brand's visual identity."

A sound is a fine start, but the rapid increase in the sophistication of voice platforms means brands need to do nothing less than conduct top-to-bottom reviews of their marketing strategies.



# RETHINKING EVERYTHING

Then there is the approach to marketing. Just as the shift from traditional SEO to voice-activated search optimisation will become more sophisticated by several orders of magnitude, so too will the broader marketing mix.



Television has long been seen as a brand-building medium for advertisers; a longer term investment. But with the advent of smart TVs and smart out of home digital screens accessed by voice, they can also be transformed into channels to make instant purchases as well. Voice enabled interactive radio advertising is just starting and is already showing impressive success. With this technology you can have a conversation with the radio ad which then gets handed over seamlessly to your mobile phone web browser. Just as we

can click an inserted ad in an Instagram or Facebook feed, so we'll be able to do that with TV, radio and smart screen ad content. In fact any surface can be a voice transmitting one.

This has ramifications both for the allocation of media budgets and for the creative content to optimise brand building, engagement and purchase – a triple impact whammy.

Integration of payment is the weakest link currently – We need to up our game.

But when it comes to seamless integration of payments into the process, China is infinitely more advanced than Europe or America. There, seamless payments that don't interrupt the flow of a conversation or digital journey are the norm, encouraging fluid, seamless conversational commerce. There is much catch up to be done – but the rewards will be significant for the technology and platform that makes this outside of China as ubiquitous as it is inside of China.



Voice assistants in cars provide another chance to offer more-or-less-instant gratification to the consumer – a coffee chain could offer passing motorists a discount or perhaps a donut if they stop by the location nearest their driving route. Timely, contextual messages can provide a powerful impulse to purchase.

Timely messages could also come to consumers in the home, mid-task. An assistant could search for recipes that match the contents of someone's fridge, order any missing ingredients as it talks them through the first stages of cooking, order wine to complement the dish to arrive just in time, and add another dozen eggs to your next regular supermarket order because you've just put five in the quiche.

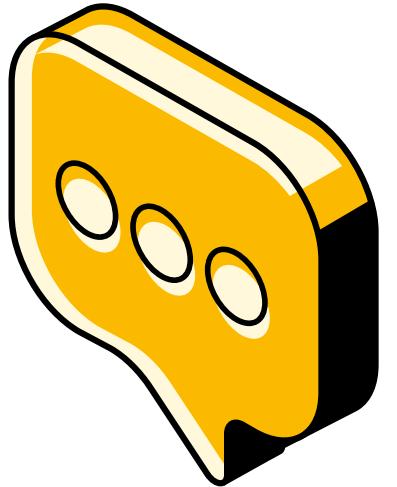
Where is the value of voice in the new shopper journey?

Whilst voice is key to elements of the shopper journey how will it add value?

Its impact will be felt right across today's non linear shopper journey at every node and touchpoint. From research, awareness post sales, Direct to Consumer sales. But it is feasible that its biggest economic value to retailers will be within store operations, supply chain and management information.

FOR EXAMPLE...  
HANDS FREE FOR  
PICK AND PACK OR  
VOICE ENABLED  
KIOSKS, THE  
INTERFACE FOR  
MANAGEMENT DATA  
FROM SMART  
FACILITIES, VOICE  
TELLING THE STORE  
MANAGERS RATHER  
THAN JUST LOOKING  
AT GRAPH PRINT  
OUTS AND TABLES.

# VOICE IS AN INTEGRAL COMPONENT OF THE IoT WORLD



The integration of voice with the connected IoT world is going to be a powerful force and a way of adding significant value to a brands proposition and usefulness to its consumers giving the potential to become an indespensible part of their daily lives.

This may be a world in which, as we go into the grocery store, the packaged good speaks to you. An apple may tell us where it was picked from and when. Where everything is a smart object and conversational. This will be a multimodal world.

Voice and vision, voice and gesture. And our connection endpoints will be multi-dimensional including platforms, assistance sites, systems, environments, devices the limits are nearly endless.

Whilst the vision of the IoT world has been slow to materialise there are signs that it is hotting up. Just take a look at Haier. This company has transformed and repositioned itself around the notion of being an Eco System IoT brand...Not a white goods manufacturer (which it still remains and is the largest in the world.) But put their white goods, the ecosystem, their RenDan HeYi business model, AI and voice enablement and you have unleashed a powerful added value component. This can bond Haier and its customers together across the Eco systems in ways hitherto unimaginable, creating superior value for the ecosystem and the customer alike.



# VOICES WILL BE HEARD RIGHT ACROSS THE ORGANISATION

In an AI voice-activated world silos within organisations will become ultra exposed, and horrendously visible to its customers. This significant risk means that smart businesses will need to reimagine their structures and people. A new range of skills will be needed.

This key project must be managed across disciplines and functions. You can't have a seamless voice process to the consumer if you don't have a seamless, cross functional team creating the voice strategy and curating the optimum voice journey. Voice strategy needs to extend across everything the brand does. A brand must have a coherent voice whether it features in an ad, a help line or an instruction manual.

Marion Sardone, who has a degree combining language and computer sciences and completed a thesis in language and identity, says designing, projecting and deploying a brand's voice is not just a technical challenge, it's also a social issue.

Of course, engineers need to be part of the conversation as they craft the algorithms and technologies, but at heart is the question of how humans communicate. Psychologists should have a

role in voice-brand development, as well as experts in brand communication and linguistics, because there's little consumer tolerance for brands that get conversation wrong.

Sardone points out that when people use a screen and things go wrong, they tend to blame themselves; but when they interact using voice and things don't work out, they blame the device because they know how to speak and how conversation works.

Listening to and then analyzing how people relate to your brand matters, too. Listening to what people ask and are really interested in will help a brand discover what it may have forgotten because it was so narrowly focused on what it expected people to ask. There are also great insights to be found in examining what was said right before a consumer quits a conversation.



A GOOD PLACE FOR BRANDS TO BEGIN IS WHERE VOICE CAN OFFER THE GREATEST OPPORTUNITY TO CREATE EFFICIENCIES AND CUSTOMER ACCEPTANCE, PERHAPS IN AREAS SUCH AS INTERNAL VOICE-BASED BOTS FOR EMPLOYEE QUESTIONS, OR POST-SALE CUSTOMER SUPPORT FOR ONLINE ORDERS.

Finding an intersection where there are commonly asked questions and a known set of data that can offer correct answers is also a good starting point. And, to be most effective, voice should be deployed only where it can actually enhance the consumer experience, by removing barriers and deterrents to making a purchase.

When we look back at the development of the internet it is clear to see that most of the initial value was created within the parameters of "efficiency". It was easier to purchase, easier to search, the logistics were easier.



When we moved to a more mobile world the focus was on "attention" manifesting itself in screen time engagement with consumers.

We are now moving onto the next dimension with AI voice driven systems. Here the fight will be on "authority". This is because consumers are increasingly going to give up visibly and decisions to voice assistants who will be making recommendations to them.

As Abhishek Suthan says" AI systems are fundamentally reinforcing systems" so to be positioned as the authority will accelerate the reinforcement to create a virtuous circle which

before too long might be impossible for someone else to pursue.

What is clearly at stake today and up for grabs across many sectors is where authority in voice will lie.

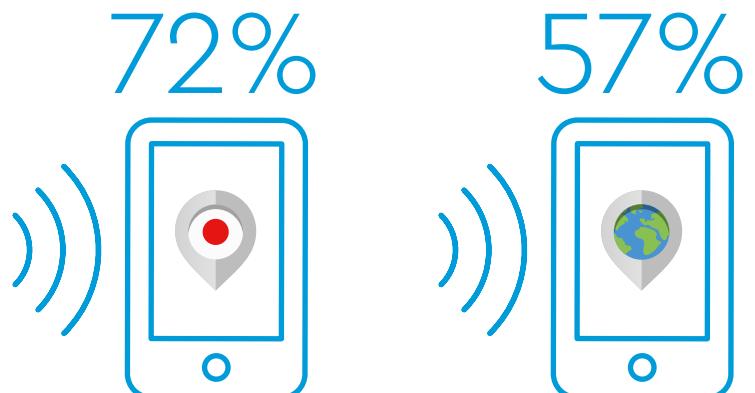
So the choice is stark. You can either play now and build that presence and create the authority. Or choose to wait. If you choose to play later the gap between you and your category or brand competitors grows exponentially and so does the cost of playing catch up. It becomes even more urgent if your competitors are doing it because they will take the key positions. If there is nobody in the field it's easy to capture it.



**BUT ONCE SOMEBODY IS  
ESTABLISHED AND THE AI SYSTEMS  
REINFORCE THEIR AUTHORITY IN IT,  
WHICH THEY WILL BE INBUILT TO  
DO, IT BECOMES A LOT EASIER FOR  
THE FRONT RUNNER TO INCREASE  
THE GAP OVER THE SECOND OR THE  
THIRD IN THIS VITAL RACE.**

# OBSTACLES AHEAD

Brands should also bear in mind that voice is not always going to be the best choice for consumers. There will undoubtedly be times and situations when they prefer not to speak out loud. The embarrassment factor is not to be underestimated.



**Wunderman Thompson research in collaboration with Mindshare, for example, found 72 percent of regular voice users in Japan said they would feel too embarrassed to use voice technology in public. Globally, this figure was still a high 57 percent. And imagine the social disruption of a train carriage full of people all talking to their devices. It's bad enough when you have one person talking loudly on their cell phone.**

And there's the reality that stretched budgets post-COVID are likely to hit many brands' willingness to invest in what they see as a long-term and perhaps experimental technology. The pressure is on to make short-term gains, and investing in voice is certainly a medium to long-term strategy. As many businesses battle simply to survive, investment of time and money in solving the complex challenges AI-voice represents may have to take a back seat.

Douglas Baker puts it succinctly: "If you're a business now with three things to do and one of them is to fulfil online orders more efficiently, that's going to be the one you focus on."

It's tempting in this context to delay investing in voice in order to focus on short-term goals, but in order to be sustainable, brands do need to find a way to do both. They also need to consider issues beyond their products, services and their competitive set.



## BRANDS BEWARE –

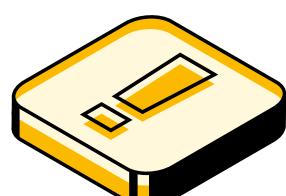
# VOICE IS ALSO A SOCIAL ISSUE

Having a voice and being part of a conversation with consumers also brings responsibilities for brands.

Brands need to ensure they are not inadvertently discriminating against people who speak a different language – both literally and figuratively – to the kinds of people who tend to work in the technology sector or for an individual brand.

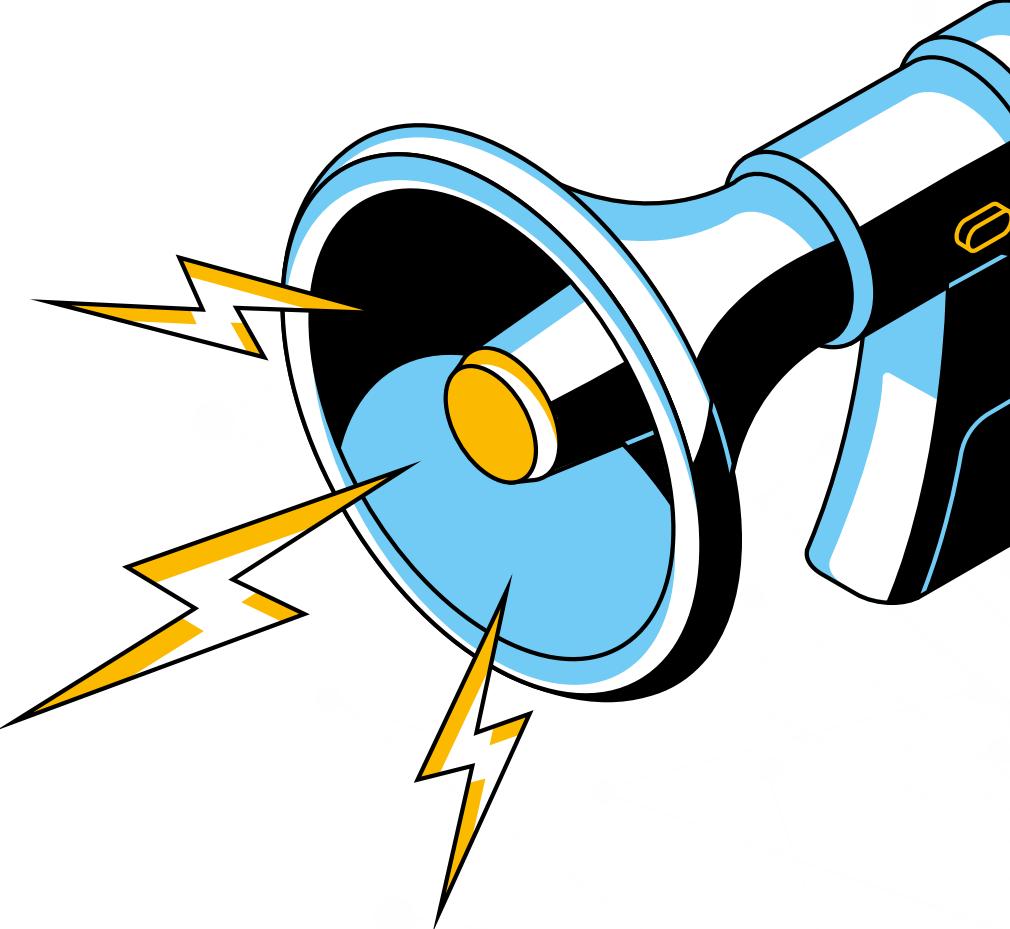
AI assistants learn and become more focused the more conversations they have, so there is a risk that every day they become better at talking to, for instance, 20-something white male programmers in San Francisco, they become less responsive to anyone who is different, whether that's because of age, gender, location or ethnicity. The full range of accents, dialects and speech patterns must all be "learned" if the technology is to be – as it surely must be – as universally accessible as the internet. We must ensure that everyone is understood we don't inadvertently create a "voice poor" sub-set of citizens.

The moral obligation goes further. It's also important that brands take a clear position and respond to instances of racism and hate speech, staying silent or not being timely on these issues on your AI and voice platform, though, is no longer an option, particularly as consumers come to think of voice tools as the actual embodiment of the brand.



"If someone's using abusive or racist language. I don't think it's an option to always say 'I don't have an answer for you on that'. Communication is social and you can't not communicate about this," says Marion Sardone.

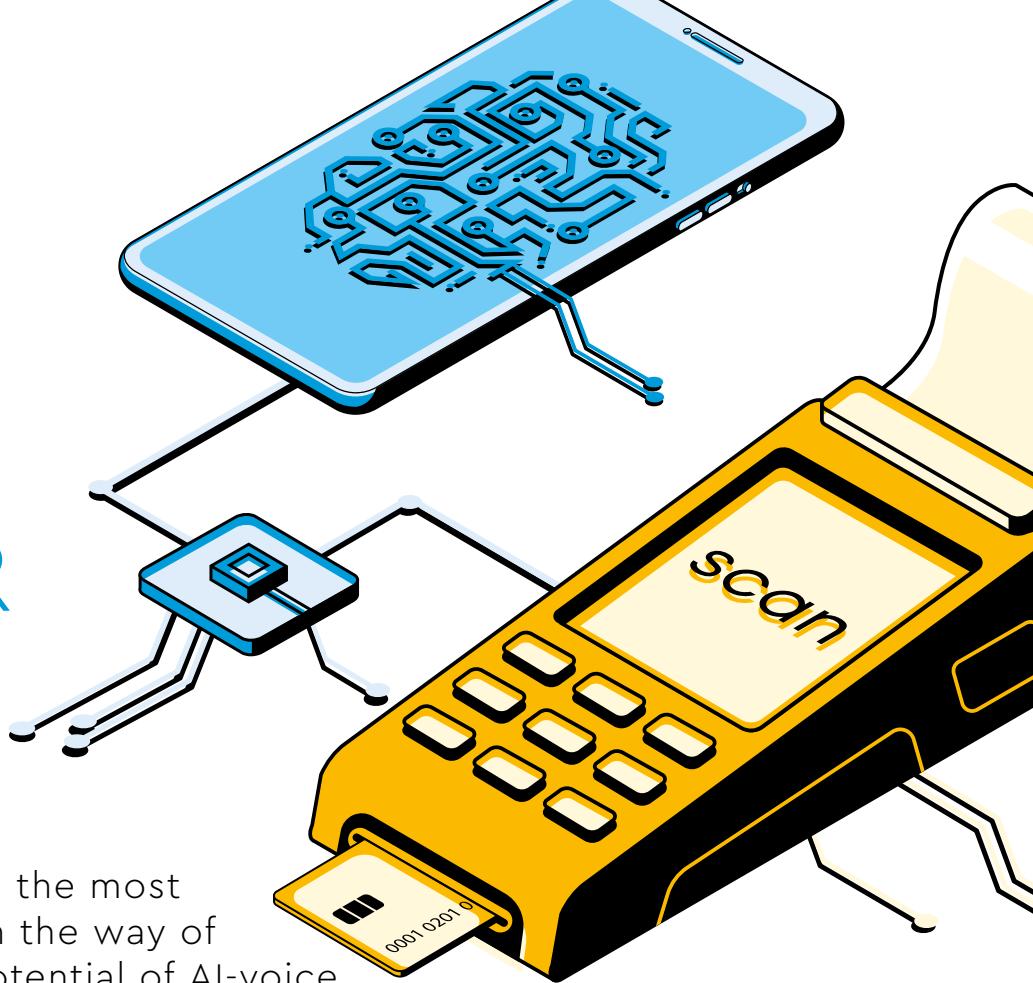
In fact, it appears that all the major virtual assistants currently on the market have recently been updated specifically to respond more fully to the query, "Do black lives matter?" Amazon's Alexa, Apple's Siri, Google Assistant and Microsoft's Cortana each handle the question slightly differently, but each in their own way confirms that "yes, black lives do matter". Alexa and Google Assistant offer more information and background on the current situation. All these brands have made statements about their commitment to speak up on racism, so these changes to their assistants bring them in line with that commitment.



## BEING PART OF THE SOCIAL ISSUES MEANS THAT YOU HAVE TO KEEP UP WITH THE ISSUES OF THE DAY.

This adds another layer of complexity as you have to be continuously reviewing and updating your voice strategy and most importantly the syntax of your voice content and the component parts of the conversations especially as new "issues of the day" issues rise in importance unexpectedly – but being swift and agile in response in a voice world will be table stakes for success.

# THE TRUST FACTOR



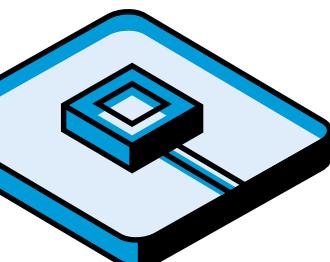
Undoubtedly, though, the most significant obstacle in the way of developing the full potential of AI-voice technology, hyper-personalisation and autonomous decision making is the question of trust.

This will become increasingly important because, let's be clear, the current iterations of voice assistants are merely the beginning of a much larger, smarter and more interactive AI-voice assistant generation, that will revolve around ultra-personalisation and the triangulation of many different data sources and true individualised observational research.

We are unlikely to be too troubled by the implications of our music requests on Spotify or Pandora, or requests for jokes, or queries about the weather. But things will be different as usage and AI-voice functionality increase, and as we approach the era of the Digital Twin.

Asking the internet questions about the health of a child, or about sexual health, checking bank or credit balances, ordering prescriptions, all these things, especially in aggregate, can create a highly detailed and sensitive picture of an individual, their work and their household.

Voice is a biometric identifier, and what that means goes way beyond identifying an individual. Voice patterns, their cadence and tone, can indicate anger, sobriety (or the lack of it) enjoyment, aggression, in short, the whole gamut of emotions. It is even able to indicate mental health and help diagnose psychosis, mania, depression, and post-traumatic stress disorder, as well as neurological disorders such as Parkinson's disease and Alzheimer's.



Now is a good time in our "Do you hear I what I hear?" journey to pause and look at things from a brand perspective.

# HOW ARE THE BRANDS OF DIGITAL VOICE ASSISTANTS AND SMART SPEAKER INTERFACES SEEN BY CONSUMERS?

Let's have a look at some data and insights seen through the lens of BAV, the world's biggest and most authoritative brand knowledge platform.

BAV can tell us how the consumer sees the status of the current brands in the voice space.

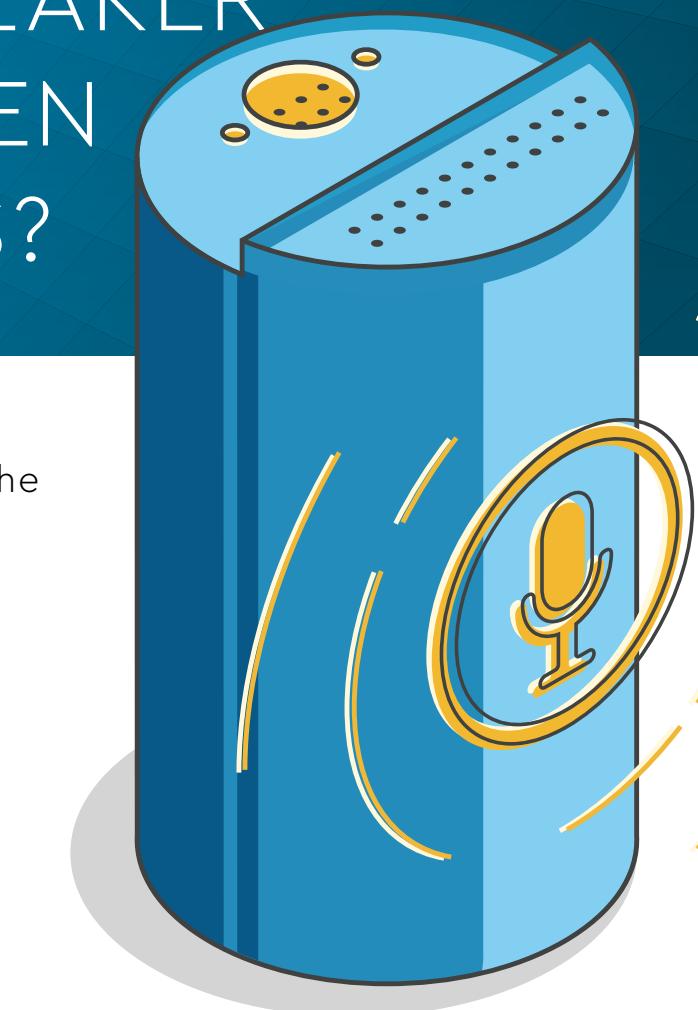
This is vitally important in order to arrive at a holistic view of voice, not just a technology centric one.

At the end of the day, it's the consumer who will decide the fate of the brands operating in the voice space.

Not only will brand components play a significant part in speed of adoption but they'll also trigger consumers' emotional connections with different brands of both digital assistants and smart speaker devices.

BAV provides a unique lens through which to study our consumers. With its xxxx. Here we will look at BAV data from the USA and the UK.

The brands in this study include the likes of Amazon Alexa, Apple's Siri, Microsoft Cortana, Google Assistant, Amazon



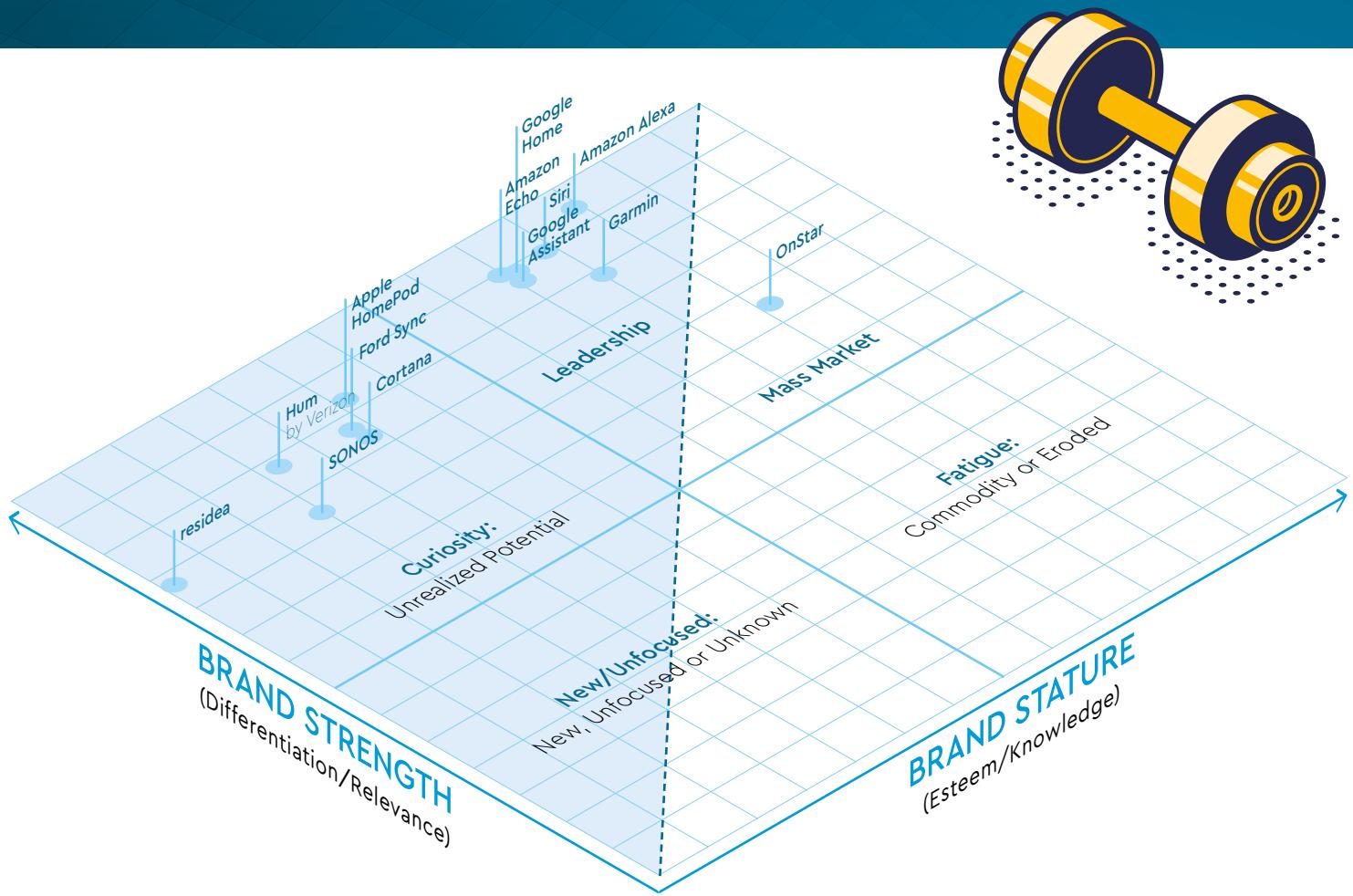
Echo, Apple HomePod, Ford SYNC, Garmin, Google Home, Hum by Verizon, OnStar, Resideo and Sonos.

There are many insights from this research and analysis but here we look at 3 elements that will give you an understanding of the current brand landscape.

# THE STRENGTH OF THE BRAND

We look at how strong the brands are in terms of the essential brand attributes that are relevant to the consumer. Also, we measure how different they are seen to be compared to other brands, how well-known the brands are and in what esteem they are held by the consumer.

The relationship between the two is illuminating.



What is clear is that none of the brands in this space are seen as tired old has-beens or commodities. Not very surprising, given that the brands come from what is essentially a new category. What is unexpected is that consumers are aware of all of the brands and that they perceive them to have a distinctive focus.

The place where these brands currently sit in the minds of the consumer is of tremendous significance.

They are generally seen as brands that have leadership associations.

More importantly, they also have much untapped potential.

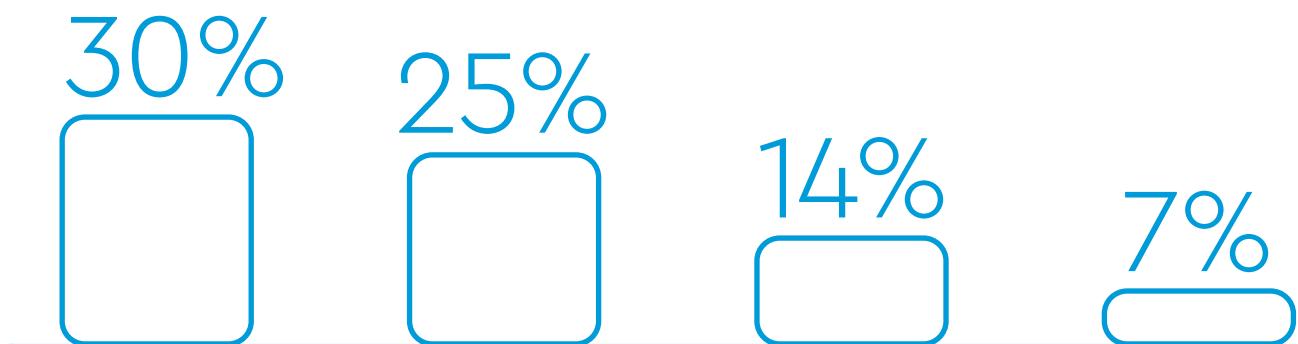
There is still a lot to play for from a brand perspective in this space. Huge opportunities to solidify positions and leadership. That being said, at the moment Amazon's Alexa is leading the pack.

The BAV research show a very similar brand landscape and consumer perception in the USA and the UK.

# CHANGES OVER TIME

Having said earlier in the paper that the development in voice is moving fast and the technology is rapidly improving in key areas, BAV see this being mirrored from a brand position perspective as well.

Voice powered digital assistants have been rapidly gaining brand power over the past few years.



**Look at the stats: a 30 percent increase in knowledge, 25 percent increase in stature, a 14 percent increase in esteem and 7 percent increase in relevance, just since 2017.**



Changes of that magnitude are not often seen over that short a period when looking at new and young brands in other sectors. This is clearly a dynamic area and a lot of change and brand disruption is likely.

When you take a helicopter view of how the consumer in general views these brands they are seen as "your intelligent ally that is gaining in popularity".

From a brand perspective, this is essential territory to occupy – especially given the technology developments coming soon to this space.

# BRAND TRUST

However, there is one significant and defining area where voice driven brands are lagging behind their positive associations. And that's in the crucial attributes of **trust** and **reliability**. They lag behind their ratings on all other dimensions



And it's in these measures where age really comes into play and it's interesting to see that in these critical territories, we see a big divide according to age group.

Younger consumers are more inclined to see these brands as trustworthy than older ones.

Proof being the brands are 33 percent more trusted, 31 percent more regularly used and 39 percent more preferred when compared to the views of consumers aged over 35.

For these brands the future's bright and there's everything to play for.



FOR MORE INFORMATION  
ABOUT BAV SEE PAGE 45

# RIGHT NOW, GOVERNANCE IN THIS REALM IS LIKE THE WILD WEST.

We are right at the start and rules are rare.

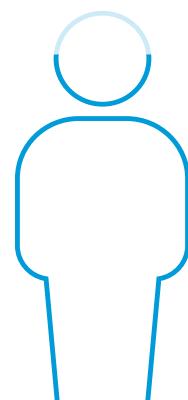
We can certainly learn lessons about what we need to do, and not do, from the development of the internet. Issues about privacy and data ownership and protection are not to be left to the technology platforms behind the most common voice assistants.

Brands need to protect their own businesses – and have an opportunity to be the voice of the consumer in this discussion. It's in their interests to do so, because only if consumers trust the tech enough to share deeply with it, and allow their Digital Twin to take shape, will brands be able to make use of the biggest opportunities.

89%

How much do consumers care? A lot, it seems. There are already concerns about data collection being underhand and its use unclear.

Sarah Tilley, Consultant, WT Intelligence, points out that a few years ago WT Intelligence ran a global piece of research that showed 92 percent of people in the US and UK thought that there should be ethical standards in place governing the use of personal data by businesses. And yet brands have failed to respond adequately, she says.



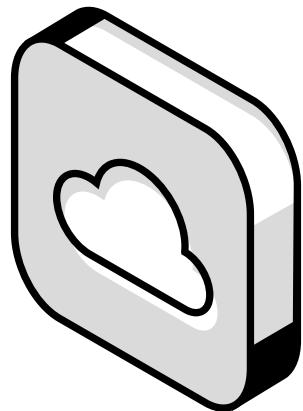
**"It's no wonder that 89 percent of US consumers feel that the way companies collect and use data is 'sneaky', according to our new WT Intelligence report, The Privacy Era," Tilley says.**



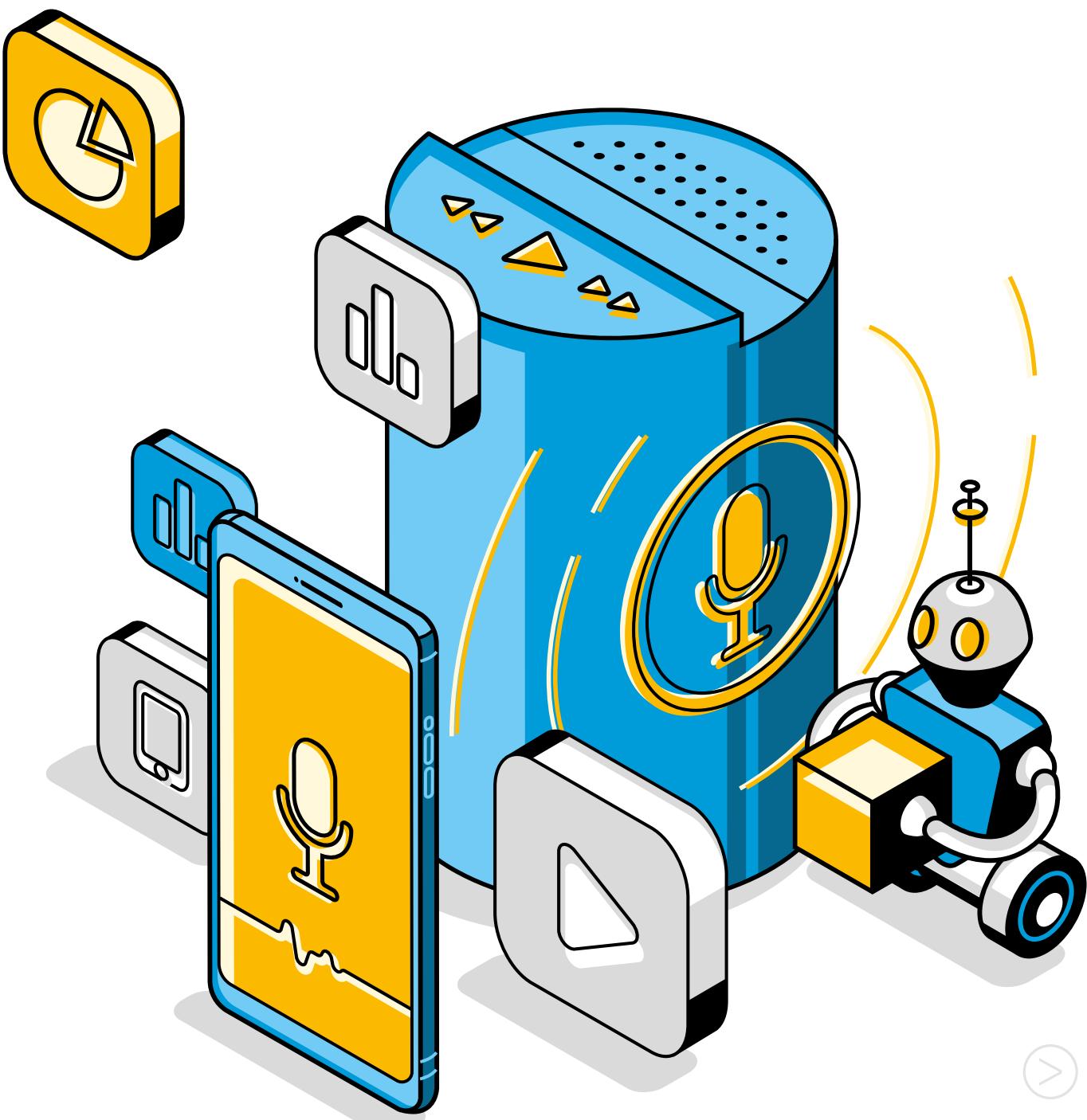
"Google is aiming to address this crisis of trust with their new security commands that allow people to tell their Google voice assistant to erase things it's heard," she adds. "But there is still much work to be done."

Brands who want to win in the voice-tech space need to be transparent about their use of personal data and bake privacy protection directly into their products."

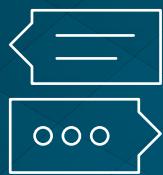
For this to be truly game changing there is a requirement for an ecosystem that is built on 4 critically important enabling principals:



## Trust, Choice, Inclusivity and Openness.



# THE RICHNESS OF VOICE DATA



THE WORDS



THE ENVIRONMENT



THE SENTIMENT



THE TONE OF VOICE



THE VOICEPRINT  
Biometric identification of the individual



THE BIO MARKER  
which could indicate health status



AGE, GENDER  
AND ETHNICITY

# RULES OF ENGAGEMENT

One of the clearest ways brands can help build consumer trust is by the establishment of transparent and effectively policed governance of the AI voice universe, and by making rules of use consistent across the industry.

As the technology develops, and as more information is harvested about greater numbers of people, so will the need for data contained in our Digital Twin to be secure. Unauthorised access could represent identity theft on the grandest scale imaginable, with the bad guys able to reach into, and potentially take control of, every corner of a person's life.

A starting point is that the voice landscape should be designed around an open technological common, standards-based and accessible to all, interoperable and data protected. At the moment it is not and that should be cause for concern to brands, business and consumers alike.

An open system means, for example, that businesses will own their own brand name when it is vocalised, and this will take the consumer to that brand's site or platform. It will be a sound fingerprint, a wake-up word for the brand, regardless of the

platform being used. This would work exactly as it does now with a web browser – when you type in a URL you expect to be taken to that address and not intercepted and redirected along the way.

Consumers also need to be confident that voice platforms are not harvesting data about their every action. If someone chooses to carry out all their activities within a Google or an Amazon universe, that's fine, and their movements and actions will be stored; but we must have the option to leave these realms and visit elsewhere without that voice platform recording our interactions with another brand.

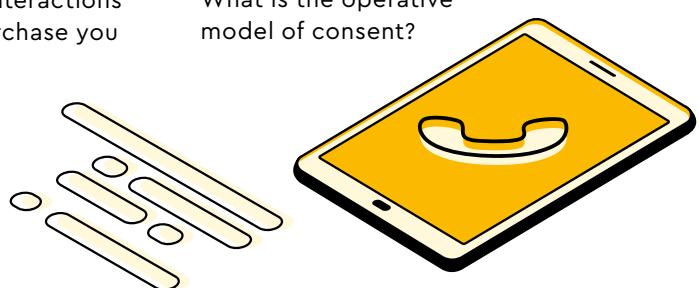
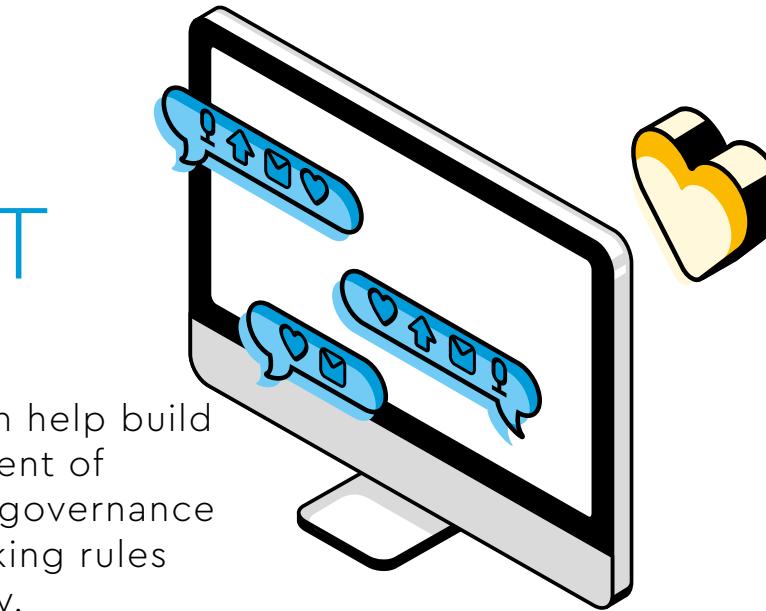
As things stand, with a typical screen-based browser, if you travel around the internet, data is collected, but once you arrive at, say, Nike.com, your browser doesn't record the data generated by your interactions with Nike, or any purchase you

may make. But right now, voice platforms claim all the data that runs through them.

This is not anti-platform. It's simply about levelling the playing field and making voice as valuable for users and businesses as it is for the platforms themselves. And, of course, the consumer should be free to decide if they want the voice platform they use to be the keeper of their data.

The important factor is that the consumer gets to make the decisions, and brands have a role in advocating for that to happen. After all, AI-voice is unlikely to reach its full potential unless consumers receive satisfying answers to the following questions: Is my data protected? How will it be used? What safeguards are in place that will keep control and choice in my hands?

What is the operative model of consent?

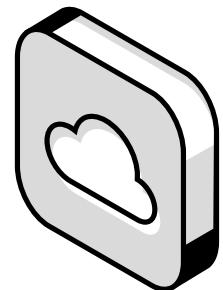
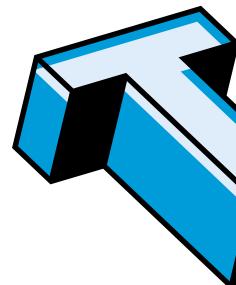
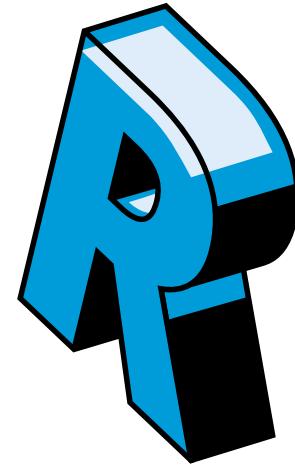
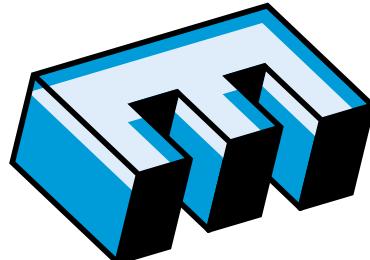
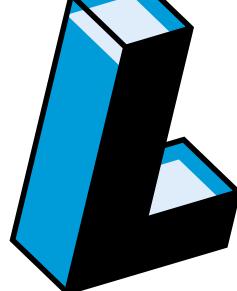
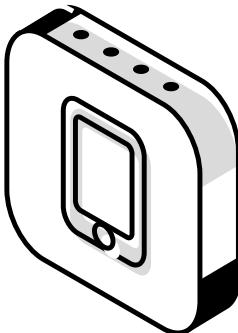


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ANSWERS ARE NOT SIMPLE, AND IT WILL TAKE MORE THAN SECURITY PROTOCOLS OR ADHERENCE TO LAWS SUCH AS THE EUROPEAN UNION'S GENERAL DATA PROTECTION REGULATION (GDPR) AND THE CALIFORNIA CONSUMER PRIVACY ACT TO ESTABLISH THEM.

# THE MORAL MAZE





Then there is the question and perception of eavesdropping. While voice assistants are activated by trigger words that "wake" them, they are always listening. And this can be of enormous benefit, a comfort to the elderly or sick perhaps, who know they can easily summon help. But what happens to all that data created by overheard conversations? Who will own it or access it, and what will they do with what they discover?

As AI-voice develops, the potential to collect and collate more than just words will arrive because our relationship will move from command to conversation. This conversation will be freighted with personal information that when cross-referenced and contextualised becomes a vast amount of intimate data.

Whether this technology becomes an all-listening, rather than all-seeing, version of Big Brother, or a confidante of utter discretion and loyalty which will be predictive and make autonomous decisions on our behalf, will depend on how seriously we take the issue of trust now, rather than further down the road when it might be too late to build.

We have the opportunity now for standardised development and to establish ethical use guidelines and rules. Once users begin to trust, we will be able to move to ever-more sophisticated levels of AI-voice interaction, which will lead to greater value for both brands and consumers.

Some of the very hardest questions that need to be addressed are fundamental ethical ones about how we expect AI-voice to act in highly charged and sensitive circumstances; questions about where your voice-activated, AI-informed device places its ultimate loyalty.

How about during a rowdy party, a guest shouts "order more beer!" It's clear to the AI-voice platform that this individual is intoxicated, and the tone of voice is a few degrees from being belligerent, even aggressive. Does the assistant order the beer or not?

What about the commands of children? Do we need different settings for many different contexts? If a motorist is stopped by police, does the in-car voice assistant reveal that the driver has been drinking and speeding? What should a platform be programmed to do if it hears domestic abuse, or a gunshot?



**THE DATA THAT WILL BE COLLECTED HAS THE POTENTIAL TO COVER A PERSON'S ENTIRE LIFE: THEIR FINANCES, HEALTH, RELATIONSHIPS, STATE OF MIND, DRINKING HABITS, WHAT THEY EAT, WHERE THEY VISIT AND WHEN AND WHO THEY INTERACT WITH, WORK AND PERSONAL INTERRELATIONSHIPS.**

And, by applying machine learning to this data, it will be possible to infer with a high degree of probability what that person will like, want to buy, where they would like to travel, and so on. With enough accumulated personal data cross-referenced with the behavior patterns of millions of other individuals, your Digital Twin may will get to know you better than you know yourself.

COVID has also shown how the boundaries of what we do at home now fully extend into the intricacies and confidentiality of our work lives. With deep personal and deep business conversations happening in the same environment, sometimes concurrently.

If not now, when?



# THE FUTURE'S NOT WHAT IT USED TO BE



So, yes, brands can sit out the conversation that we must have about voice.

They can wait until it takes its quantum leap into the realm of the Digital Twin over the next five years or so.

But, if brands are not gaining the experience of what works and what doesn't, both from a technology and consumer standpoint, then the chances of being able to play catch-up with leading actors in the field are going to rapidly diminish over time.



# ACTION POINTS: STARTERS FOR TEN

1

How to navigate the voice-controlled brandscape

2

Give yourself a maximum of 12 months from now to decide on the right sound and personality for your brand. It must match what you aspire to be, but also what feels right for the impression consumers already have in their minds.

3

Talk across departments about the role of your brand in a voice-activated world, and develop the vocabulary to enable everyone to be part of the discussion.

4

Take the three stages of AI-voice development and plot how you can make progress in each. Then deduct at least six months from each timeline; the world is speeding up.

5

Consider how AI-powered conversations with real people can be used as a research tool to inspire product development, personalisation and the creation of contextual content that helps make a brand indispensable.

6

In imagining what might be possible, think not just about what you can do but what you should do. There are big moral implications for participants in a voice-enabled AI world, and we currently have many more questions than answers.

7

Think "Mixology". Who can you partner with to jump start your voice journey. What curated mix of technologies can give your value proposition a significant competitive advantage? Consider what tech startup you should work with to turbo charge your implementation?

8

Be a moral leader. How can voice be part of your strategy about positioning your brand and company as a leading ethical example within your industry

9

There is absolutely no substitute for on the ground learning. If you're not experimenting you are not learning and if you are not leaning you're not adding value to the organisation. Set an objective to learn first and fast.

10

A smart shiny voice and AI project is not something that can be done, then left alone for a while. You wouldn't put up a new web site and then not make any changes, revisions or content additions for 6 months. This is doubly true of voice. Think through how it is going to be continuously monitored, added to, refined and source corrected. Creating a sustainable way of doing this from the beginning is essential.

Think organisation. Voice is not just a technical thing. . .where does it sit in the organisation for maximum impact and business results.

# ABOUT BAV

Unique to WPP, BrandAsset® Valuator (BAV®) is the world's largest and leading empirical study of consumer brand perceptions.

Since 1993, BAV has measured over 60,000 different brands around the world. Evidence of BAV's scale, depth and breadth are the 75 consistent brand image and equity metrics we set for every brand.

Gathering and accumulating data from across 50 countries, we pride ourselves on our global footprint.

We measure extensive brand qualities and metrics that drive financial and marketplace success. Our unique approach not only allows us to understand a brand versus its competitors, but also allows us to identify its broader role in culture.

Developed in collaboration with academic partners at Columbia, MIT, Dartmouth, and the University of Washington, BAV uniquely captures the key dimensions that impact brands – their momentum, advocacy, financial success in the marketplace and subsequent increase in shareholder value.

**BAV is the world's largest brand knowledge platform.**

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Jon Stine is the Executive Director of The Open Voice Network (OVN), the non-profit global association dedicated to bringing the value of standards to the world of artificial intelligence-enabled voice assistance. The OVN is a Directed Fund of The Linux Foundation.

Jon's CV reflects more than 30 years of executive leadership in the retail and technology industries. He led sales of national apparel brand to better US department and specialty stores before joining the Intel Corporation in 2000 to head its first global outreach to the retail and consumer goods industries.

He joined Cisco Systems retail-consumer goods consulting team in late 2006, and later headed Cisco's North America consulting practice for retail-CPG. In 2014, he returned to Intel as the Global Enterprise Sales General Manager for the retail, hospitality, and consumer goods industries. He left Intel in 2019 to build The Open Voice Network.

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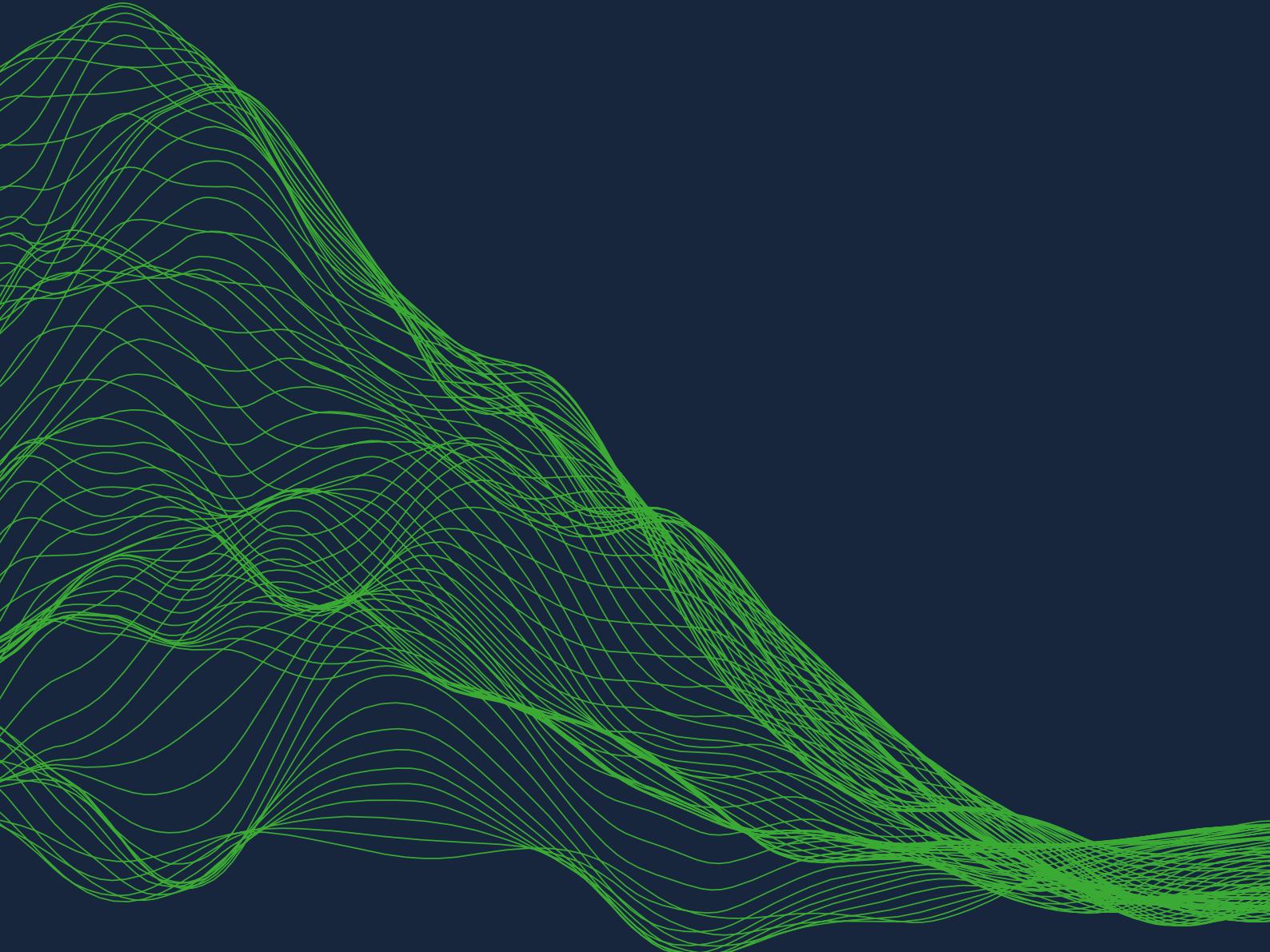
David started his career at the House of Commons working for a member of the UK Parliament. He swapped politics for the cut and thrust of advertising. Joining Bates Dorland, he became main board director for strategy and Managing Director of the consulting and digital divisions and CEO of the worldwide retail and technology centre of excellence. David joined Kingfisher's B&Q plc, one of Europe's largest retailers sitting on the main board of directors as UK and International Marketing Director.

David is now the CEO of The Store, EMEA and Asia, the WPP Global Retail Practice and Chairman the BAV Group and is an acknowledged expert in Branding and Consumer change in China. He is a leading authority on digital and Artificial Intelligence in retail.

David has authored a number of books and studies and broadcasts and lectures around the world including BBC, CCTV China, CNBC, Yale, CKGSB and Cambridge Universities.

David is a former non-executive director of the NGO, "TFT", an organisation dedicated to sustainable production. He is Chairman of the Centre for International Business and Management (CIBAM) where Academics, Business and Policy Makers meet with activities taking place at Queens' College, University of Cambridge. He is also a board member of China-Britain Business Council.





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