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The Rise of Voice Technology as the Fourth Sales Channel

Implications for Consumer Journey, E-Commerce, and Brand Strategy

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Overview

Dubbed the "fourth sales channel," voice-enabled technology has garnered increased attention in recent years. The implications of voice-enabled technology for eCommerce, consumer journey and brand strategy are far-reaching. The increased adoption of voice assistants is impacting the consumer decision journey, from search through path to purchase for the consumer goods category. In this whitepaper, we detail the history and projected growth of this technology, as well as current consumer device usage trends. We recommend how leading companies can capitalize on the growing demands for voice technology and detail the new insights required to proactively develop their unique voice brand. By doing so, brands can gain consumer preference in this channel and position themselves as leaders in this evolving technology.

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i An Introduction to Voice

Voice-enabled technology, defined as "the means by which a consumer can interact with a device using their voice as the input mechanism,"[1] is taking the tech and corporate worlds by storm. The introduction of smart speakers featuring virtual personal assistants like Amazon's Echo have signaled a fundamental shift in the way people view and interact with emerging technologies. Though the market is still young, levels of penetration for voice-enabled and smart speakers have been growing exponentially and do not show signs of slowing any time soon. Nearly half of all smartphone users around the world already use the voice-enabled technology on their phones at least once a month,[2] and experts forecast smart speaker adoption will be more rapid than other personal devices we have seen to this point.[3] The number of installed devices will likely reach 175 million by 2022,[4] and voice searches are projected to make up between 30 and 50% of all searches within the next two years.[5]

These sales will only be bolstered as more and more household and commercial products, like refrigerators or copy machines, become equipped with "smart" capabilities and integrated into the "Internet of Things." As artificial intelligence continues to make strides, voice technology is becoming increasingly sophisticated, while simultaneously becoming more user-friendly. From placing and predicting orders to activating home systems, its remarkable and burgeoning capabilities have piqued the interest of consumers, entrepreneurs, and established companies alike. The impact on culture and awareness has been dramatic as well. In the US, Amazon's Alexa Super Bowl commercial in February 2018, poking fun at itself in a watershed moment in the acceptance of voice-enabled technology, indicated that it has become so mainstream that it has taken a spot in our daily lives and we all get the joke.

> ***"Voice searches are projected to make up between 30 and 50% of all searches within the next two years"***

These inroads and projections have led many to predict that voice search and voice-controlled technology of all types will dominate consumer markets and disrupt consumer behavior, and do so rapidly. In addition to restructuring the way consumers research and purchase products, this technology promises to spur the integration of many different devices and industries into singular systems that permeate our day-to-day routines and habits and overall relationship to technology and artificial intelligence.

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Consumer Adoption of Voice Technology

As mentioned previously, consumers of all types are adopting smart speakers and dictating to their devices at rapid rates.[6] These levels of penetration are only expected to grow.[7] Over the next five to ten years, experts expect voice technology will fundamentally alter purchasing habits and decision-making processes.[8] Core ways in which voice search technology is expected to change the commercial landscape include the types of search terms used, the channels through which products are bought, and the enabled expansion of the Internet of Things.[9]

> **"People can generally speak around 165 words per minute, but can only type about 45 in that time."**

It is not hard to see this shift taking place already in usage and in culture. North American consumers are quickly becoming more comfortable talking to their technology, and in many cases are beginning to prefer it over traditional manual search methods.[10] Currently, the dominant forms of voice technology are voice search on smart phones and virtual assistants in smart speakers.[11] Both of these developments offer natural complements to traditional screen searches, and this appears to be driving their popularity.

And this holds true across age groups. Whereas most emerging technologies tend to catch on in younger demographics and gradually trickle to older segments, voice search technology (still classified as being in the "early adopter" phase) shows rapid growth in both the teen and adult populations.[12] This said, there are somewhat distinct usage occasions among different age groups. For example, teens are more likely than adults to use voice search to call someone, listen to music, or even get help with homework. Adults are more likely to use it to ask for directions or dictate texts.[13] Both groups are more likely to use voice search technology when watching TV and around friends, though adults report using it more frequently while cooking.[14] Nonetheless, research indicates that even the most habitual smart speaker users use their devices primarily for the

following "portal functions:" listening to music, asking general questions, finding out the weather, setting an alarm, listening to the news, getting directions, and checking the time.[15]

Additionally, in a world that has become more connected, more mobile and with people having shorter attention span, voice technology offers convenience, speed and flexibility that are unmatched by the traditional form of typing or writing. People can generally speak around 165 words per minute, but can only type about 45 in that time.[16] Therefore, comparatively fast rates of adoption are likely associated with the technology's ease of use and the ever-present desire for faster, more efficient ways to perform everyday tasks. Being able to ask a question or say a phrase is easier than typing words and navigating buttons. To this end, research indicates that many consumers simply do not enjoy or appreciate more traditional forms of search and internet navigation and find voice-enabled options to be more convenient and precise.[17] This will only increase as 'connected cars' and other opportunities emerge for consumers to remain seamlessly connected to the Internet no matter the time of day or task at hand.[18]

One of the fundamental ways in which voice searches and home assistants appear to be changing online consumer research is in the types of searches being used. Studies indicate that people tend to be more 'conversational' in their voice searches compared to manual ones.

Furthermore, the adoption of voice technology is expected to increase sales in online channels like Amazon and Google Express,[19] as the branded virtual assistants at the heart of smart speakers and voice search technology will essentially serve as a one-stop shop for consumer needs. According to one report, "the smart speaker battles are really the digital assistant war," and "each of the tech companies views owning their digital assistant as their manifest destiny—protecting their core and tapping into new growth dollars."[20]

However, it is also expected to stimulate local businesses. Requests to find shops and venues "near me" will naturally direct consumers to the establishments closest to them first.[21]

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The Rise of Voice as the Fourth Sales Channel

The Consumer Technology Association now refers to voice technology as the "fourth sales channel" alongside stores, mobile, and online shopping.[22] 62% of those who regularly use a voice-activated speaker say they are likely to buy something through their speaker in the next month.[23] Therefore, it's not hard to see how even small efforts by companies and brands to incorporate virtual assistants and voice search technology may yield considerable payoffs. There are a number of ways we recommend companies and brands can capitalize on these trends in eCommerce, consumer journey research and brand strategy.

First is through immersion.[24] The first step to profiting from the trend is becoming as familiar as possible with the technology and its capabilities through first-hand use. This will foster a working knowledge of the technology and how its capabilities can/already fit into a given industry. In turn, this should make it easier to anticipate competitors' initiatives and to dedicate research and development efforts to more focused commercial ventures.[25]

Next, we offer two dominant strategies brands can employ to optimize voice technology in this emerging "fourth sales channel." The first is enhancing sales on Amazon or Google Express. The second is creating unique branded experiences through Echo's "Skills," Google Home's "Actions," and/or new voice-enabled devices.[26] Which route is more appropriate will most likely depend on the nature of the brand's product or industry, and the two options may be used together or separately, depending on objectives. Regardless of which is a better fit, merely being visible and accessible on these platforms is a large part of the initial 'battle' for relevance and profit.

We outline some of the basic steps for each of these strategies, though it should be noted that the novel nature of this technology and its subsequent purchasing channel has produced a virtual blank canvas that brands can use creatively. These strategies should simply be seen as an overarching framework to inspire innovation. For example, some inventive ways to go about contextualizing these recommendations may include exploring ways of using the technology to enhance a more "personalized" and efficient consumer experience, finding ways to use virtual assistants to make consumers aware of discounts, and learning the overall time of day patterns for users of voice-enabled technology in order to better appeal to consumers at different points in their routine.[27] Moreover, as the Internet of Things increasingly allows for comprehensive smart home systems, it may be beneficial to develop apps not only for overarching systems and smart speakers like the Echo, but for individualized smart products as well.[28]

> *"62% of those who regularly use a voice-activated speaker say they are likely to buy something through their speaker in the next month"*

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1. Using Voice to Optimize Sales on Amazon and Google Express

Marketers and brand managers should prioritize integrating their products and services into the Amazon and Google Express platforms. Amazon Echo owners can easily purchase products through Amazon, and, likewise, owners of Google Home can now order products through "Google Express," a service that allows users to make purchases from a variety of stores, such as Walmart, Costco, and PetSmart. This easy access makes it more likely that consumers will opt to make their purchases based on what is immediately available to them on these platforms.

Indeed, research indicates that Amazon Echo owners tend to spend more and buy more exclusively on Amazon after purchasing an Echo Device.[29] While Amazon currently dominates the voice enabled eCommerce space, Google Home's introduction of Google Express in 2017 indicates they are ready to compete. Experts believe it is too early to say which voice assistant will come out on top, especially with the introduction of Apple HomePod in February 2018.[30] However, it is of growing importance that brands are selling—and selling effectively—on both Amazon and Google Express.

Marketers should consider the following strategies to increase voice sales for their brands on these platforms:

1. *Update search engine optimization* - Consumers will use more conversational language when using voice search (i.e. using more question phrases and longer queries), so brands should structure their search tags accordingly. Put another way, it is essential to isolate the brand's "highest value question phrases", or the questions people are most likely to use when asking a virtual assistant about a product or organization.[31] Moreover, this effort should also be ongoing, as brands must stay ahead of evolving trends in search words/phrases and "optimize for these keywords and also bids for these key terms,"[32] to ensure they are as much in line with the voice capabilities and semantic trends as possible.

> *"It is essential to isolate the brand's "highest value question phrases", or the questions people are most likely to use when asking a virtual assistant"*

2. *Consider search rankings as the new 'shelf' position* - It is increasingly important for products to show up in the top couple products on a search page, According to Joe Maceda, invention studio lead at Mindshare North America, "if you're the third or fourth in a brand category, there's significant risk." Brands will need to keep this consideration in mind as they develop their marketing strategies moving forward, as brand name recall will be vital in order for consumers to ask for a particular brand when shopping with voice.[33]

3. *Customer loyalty initiatives alongside voice strategies* - Voice search technology offers a renewed opportunity for brands to try to make their products as synonymous with a category as possible in order to ensure an advantage in algorithm results.[34] With the current state of voice technology, it is far easier to have a voice assistant reorder a product than it is to search for and evaluate various options using solely voice. So, it is crucial for brands to think about consumer loyalty and repeat purchase behavior. To succeed here, brands will need consumers to start buying their products using voice and then get into the habit of reordering them over and over again.

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2. Capturing Early Pattern Information for Predictive Analytics

It may also be advantageous to stay aware of the new and different types of the data that developments in platform-specific voice search technology will yield. For example, brands should be mindful of the increasing value of data on shopping and wish lists created by virtual assistants. Though there will always be variance in consumer behavior, aggregated patterns from these lists may provide significant, if not revolutionary, insights into purchasing behavior and how it is (or is not) evolving with technology.[35]

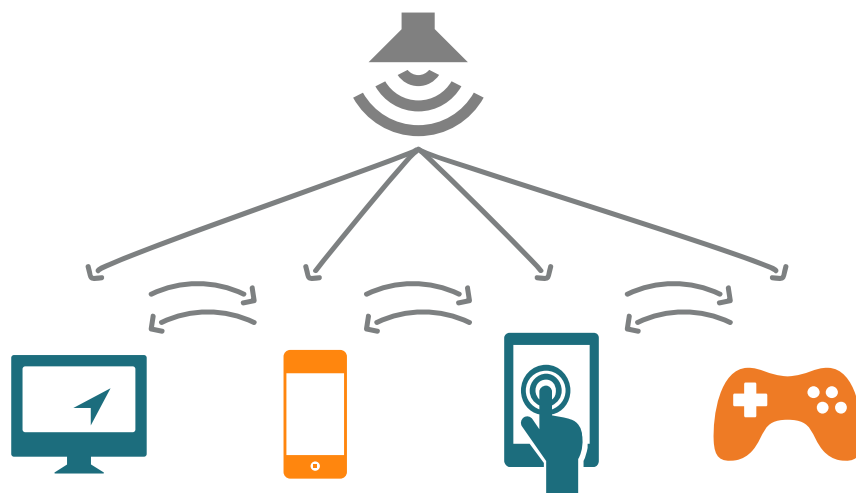## 3. Creating Unique Voice Experiences

An additional method for brands to capitalize on voice technology and its increasing role as a sales channel is by creating their own voice experiences. There are multiple ways of doing this, such as creating a voice app (called a Skill on Amazon Echo and an Action on Google Home), or creating a new voice-enabled product, such as a refrigerator with a virtual assistant built in.

Brands should approach advances in voice technology in much of the same way as they might approach other market developments: by identifying where they currently stand and where untapped opportunities exist. And since voice technology is fairly diverse in its capabilities, they will need to make these reflections with regard to multiple platforms. This process should incorporate insights into how voice technology impacts their consumer's decision journey. For example, it will be key to identify when and where consumers might use the technology to find or interact with their product and what opportunities exist to attract, convert

or retain customers in this channel. These insights will help guide marketing, communications and advertising plans accordingly. And as subscriptions continue to increase in their importance in the eCommerce space and will likely be the dominant revenue stream for the tech industry in the future, brands should look for ways to incorporate such a pricing/package structure into these developments as well.[36]

Brands that have been able to successfully capitalize on virtual assistant and voice search technology by creating their own voice experiences include 1-800-Flowers, Campbell's Soup, and P&G. For example, Campbell's Soup has a Skill on Echo that helps people prepare various recipes using Campbell's Soup. This is likely to increase sales of soup by inspiring new usage occasions for the soups. 1-800-Flowers has a Skill that makes it easy to order flowers for a loved one by answering a few questions.[37]

With this in mind, research into current "super users" would be an efficient way to learn more not only about current consumer uses and perceptions of voice technology and virtual assistants, but also about the likely directions of consumer trends as the technology becomes more commonplace.[38] Super users are classified as the portion of consumers who use their devices very frequently, having already integrated the devices into their daily lives. Though they comprise a small percentage of all smart speaker owners, they are responsible for a disproportionately large amount of the actual device usage. Thus, their usage patterns and demands should provide telling insights into the future behaviors and demands of non-early adopters as they become more acclimated to the technology.[39]

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Brands can also use voice to form or strengthen emotional connections with consumers. One way of doing this is by creating an "audio logo," which will differentiate a brand when there is nothing visual to do so.[40] For example, the five-tone sound that plays at the end of every Intel advertisement differentiates the brand. Other brands should consider developing these types of mnemonics.

Additional Considerations

Compatibility

These efforts toward general compatibility are especially useful when one considers that voice/virtual assistant technology itself is not very profitable in a direct sense. Aside from the profits generated in the initial hardware sale, Amazon, Google, and Apple mainly rely on increased habitual/automated and subscription shopping and the future purchase of more smart speakers to connect throughout the home to generate continued profit. For all other brands simply searching to capitalize on the trend, there is limited direct revenue to be gained. However, compatibility and easy accessibility will undoubtedly place brands of all shapes and sizes in the best possible position to profit from developments in voice search technology.

Privacy Concerns

While brands should enthusiastically pursue ways to capitalize on voice-enabled technology, they should nonetheless be sensitive to the considerable privacy concerns many consumers hold with regard to these developments.[41] Not only do many consumers fear that smart speakers in particular could be inappropriately monitoring their conversations for government or corporate platforms, but many are also wary of how devastating a hack of this type of data and home access could be.[42] Over 60% of consumers report a reluctance to provide any more personal information to tech hegemons like Amazon, Google, and

Apple, and a similar percentage are apprehensive of how these brands will use their voice data specifically.[43] Given that the artificial intelligence enabling voice technology is dependent on algorithms that must save and "learn" from consumer requests, it is easy to understand this concern.[44] To this end, brands should do their utmost to invest in security measures and be transparent with consumers about their brand's access during and outside of voice searches.

> *"Create an 'audio logo,' which will differentiate your brand when there is nothing visual to do so."*

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Measuring the Impact of Voice Technology on eCommerce, Brand Strategies and the Consumer Decision Journey

The rise of voice technology and this fourth sales channel will significantly impact brands' market research and insights requirements. As companies consider short-term marketing tactics focused on winning consumer preference with voice technology today, they don't want to lose sight of their long-term brand vision. Substantial qualitative and quantitative measures will be needed to fully understand the impact of voice technology on both consumer behavior and the company's overall business growth.

Below are some initial insights brands will need to gather in order to prioritize marketing spend and create successful voice strategies today:

Understanding the Role of Voice in Consumer Journey

Brands continuously seek to understand and influence the consumer path to purchase. Beyond the path to purchase, the consumer's entire decision journey is complex, dynamic and easily disrupted by new options and inputs – online and offline. Increasingly the most successful marketers realize if they want to create impactful and efficient marketing, they must be equipped with an accurate understanding of their consumer's decision journey. For example, by looking at trips to the store, engagement on social media, exposure to online advertising, word of mouth recommendations, etc.,

the "journey" to purchase is mapped and used to inform business decisions. The addition of voice to consumers' day-to-day routines not only introduces another touchpoint on the decision journey, but more importantly, it may represent a new disruption point. By fundamentally disrupting current consumer habits in decision making, marketers will need to better understand this new consumer path to purchase. It's vital for brands to understand how often consumers use voice, how they use it, how it interacts with other touchpoints along the decision journey, and what impact it has on their purchase (and reorder) decisions. For example, increased consumption of smart speakers has already been linked with higher rates of daily listening to podcasts. Podcast listeners, furthermore, have been shown to be more likely to make online purchases based on ads heard while listening, and generally spend ~27% more on eCommerce than the average consumer. This may be a voice/smart speaker-dominated touchpoint worth researching.[45]

With this in mind, additional information on how voice search technology relates to specific consumer clusters may be needed. Given the fact that usage of voice technology will vary across different consumer groups, it will be an important factor in future segmentation research. If there is a certain type of consumer who is most likely to be an early-adopter of voice-enabled technology or be persuaded by advertising on voice platforms, that will be an important consideration to marketers.

> *"The addition of voice to consumers' day-to-day routines not only introduces another touchpoint on the decision journey, but more importantly, it may represent a new disruption point."*

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Driving Consumer Loyalty in the Age of "Brand Bypass"

Currently, the easiest way to make purchases with voice assistants is to reorder a product that has been ordered before. It follows that there will be an increased focus on learning how to make consumers loyal to a brand so that they are willing not only to voice search for their product specifically, but to also continually reorder it using voice. In confronting this and related questions, brands will increasingly have to navigate the challenges associated with the "brand death" or "brand bypass" that some experts fear voice search technology will bring. Specifically, as search terms become more conversational, consumers will be more likely to ask for results by generic category terms ("Alexa, send me double-A batteries") instead of requesting results from a specific label. To survive, brands will need to be proactive in both their research and consumer experience initiatives.specifically, but to also continually reorder it using voice. In confronting this and related questions, brands will increasingly have to navigate the challenges associated with the "brand death" or "brand bypass" that some experts fear voice search technology will bring.[46] Specifically, as search terms become more conversational, consumers will be more likely to ask for results by generic category terms ("Alexa, send me double-A batteries") instead of requesting results from a specific label. To survive, brands will need to be proactive in both their research and consumer experience initiatives.
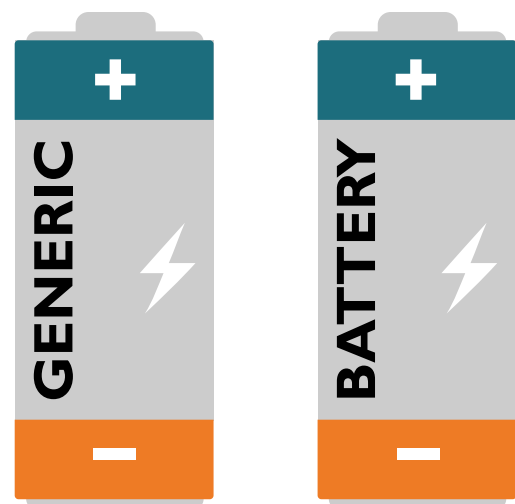
Optimizing E-Commerce Integration

With 90% of consumer goods growth coming from online sales, marketers are racing to keep pace with the rapid growth of eCommerce.[47] Understanding how this growth intersects with voice search technology and virtual assistant platforms will be essential. As discussed previously, brands will need to optimize sales on existing voice platforms by rethinking search optimization strategy and ensuring their brands rise to the top of search algorithms. As the number of voice platforms continues to grow, the importance of integrating eCommerce strategy with voice will become even more imperative. For example, the two main voice platforms used for sales now are Google Express and Amazon. When more retailers have their own unique voice

platforms, brands will need to thoroughly understand how to craft eCommerce strategy incorporating voice for each platform.

Firstly, there will be implications for the ways consumers search for products. It is likely that some eCommerce retailers will have more advanced voice capabilities than others. When consumers are using voice to search for products 90% of the time from one retailer, and only 10% of the time for another retailer, brands will need to be prepared to adapt accordingly.

Brands will also need to consider how the combination of voice and screen will change perception of their products. Now the eCommerce team needs to establish a new voice playbook to optimize consumer experience from new product discovery to problem solving to reordering. In a situation where a screen is involved in consumers' decision-making, brands should not simply recycle existing digital content such as pack images and product descriptions for a voice-assistant screen, because how consumers engage with a voice-assistant screen is different. how consumers engage with a voice-assistant screen is different.
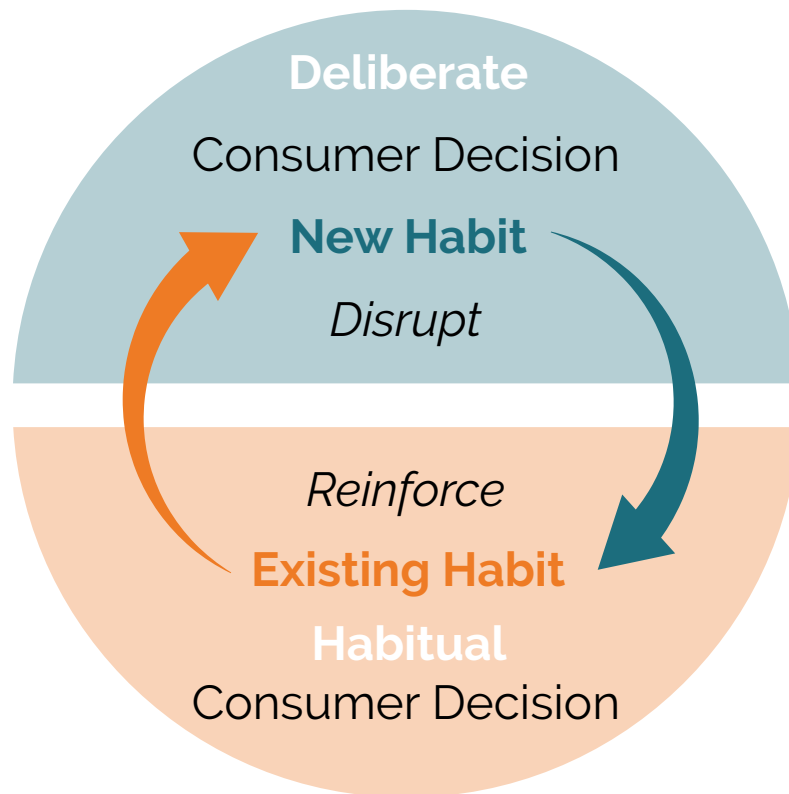
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Crafting Brand Strategy to Address Consumer Habitual-Deliberate Loop

As indicated throughout this article so far, one of the biggest impacts of voice technology is the disruption of consumer habits. New habits will inevitably form as voice technology advances. If these consumer habits favor a brand, the brand will need to reinforce those habits. However, if these habits lead to decreased sales for a brand, the brand will need to disrupt the habits. Finally, once the desired new habits are formed, the brand will need to find ways to reinforce those habits. At SKIM, we call this the "Habitual-Deliberate Loop" (see diagram below).

Navigating this Habitual-Deliberate loop is a tall order, but brands who truly understand the entire consumer journey and the role of voice in that journey, and focus on optimizing the e-commerce experience through the use of voice, will have the ultimate success in keeping existing customers and winning new ones.

While voice technology is at an early stage as the "fourth sales channel," by starting to address the Habitual-Deliberate Loop of consumer habits now, leading brands will help shape and nurture tomorrow's habits of voice technology. This will ultimately benefit the brands when the voice technology evolves and matures, and purchases and repurchases through voice become common practice among consumers.

Habitual-Deliberate Loop

Deliberate
Consumer Decision
New Habit
Disrupt

Reinforce
Existing Habit
Habitual
Consumer Decision

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Conclusion and Recommendations

The growing impact of voice enabled technology is reshaping eCommerce, consumer decision journeys and search and purchase patterns. As the fourth sales channel gains momentum, companies will require new eCommerce and brand strategies to address the changes in consumer decision behavior.

For nearly 40 years, SKIM has helped leading brands perform better by analyzing and predicting consumer decision behavior – both online and offline. Voice enabled technology and the resulting opening of this fourth sales channel will challenge everyone, just as the introduction of eCommerce required fundamental changes to the way we think about marketing and retail. We can help.

Here are recommendations for first steps:

1. Identify how voice search technology and voice assistants relate to your industry, category and product today. This will involve research into both general and specialized questions.

    > What drives consumers to adopt voice search technology? Virtual assistants?

    > When would voice technology be most helpful (e.g. a certain time of day or during a certain task) in relation to my product, and in what way?

    > How would voice searches for my product begin and proceed? For example, does it begin with creating a shopping list via voice?

    > What role does pricing or promotions play when consumers search via voice assistants?

2. Put into motion tangible and testable efforts to improve your brand's accessibility on all voice assistant platforms through appropriate search terms and product development.

3. Proactively secure your survival in the age of "brand bypass" by beginning to develop a unique voice brand.

On a cross-category level, more research is needed to determine how voice technology will be adopted for purchases in various categories. Based on existing research, it is likely that voice technology will be used first for existing habitual, repeat purchases that can be executed with the simple command "Alexa, I need more toilet paper" or "OK Google, I'm out of batteries." As the technology develops and consumers become more comfortable using voice, the purchases made with voice will likely become more complex. Voice has the potential to be the dominant purchase channel, especially as it becomes integrated with more of the items we interact with every day.

About SKIM

SKIM people are research heavyweights specialized in customer decision behavior. Bridging the rational and emotional, we partner with leading companies like yours to understand and influence the customer journey across all channels. Clients trust us for our critical, whole-brained smarts – we convert tough business questions into easy-to-grasp reporting and actionable answers.

Say goodbye to traditional tactics, set sales funnels and outdated insights - contact our team today.

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decision behavior experts

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