

# Cortana, Siri, Alexa, Google Assistant

How the Digital Assistants are changing our world



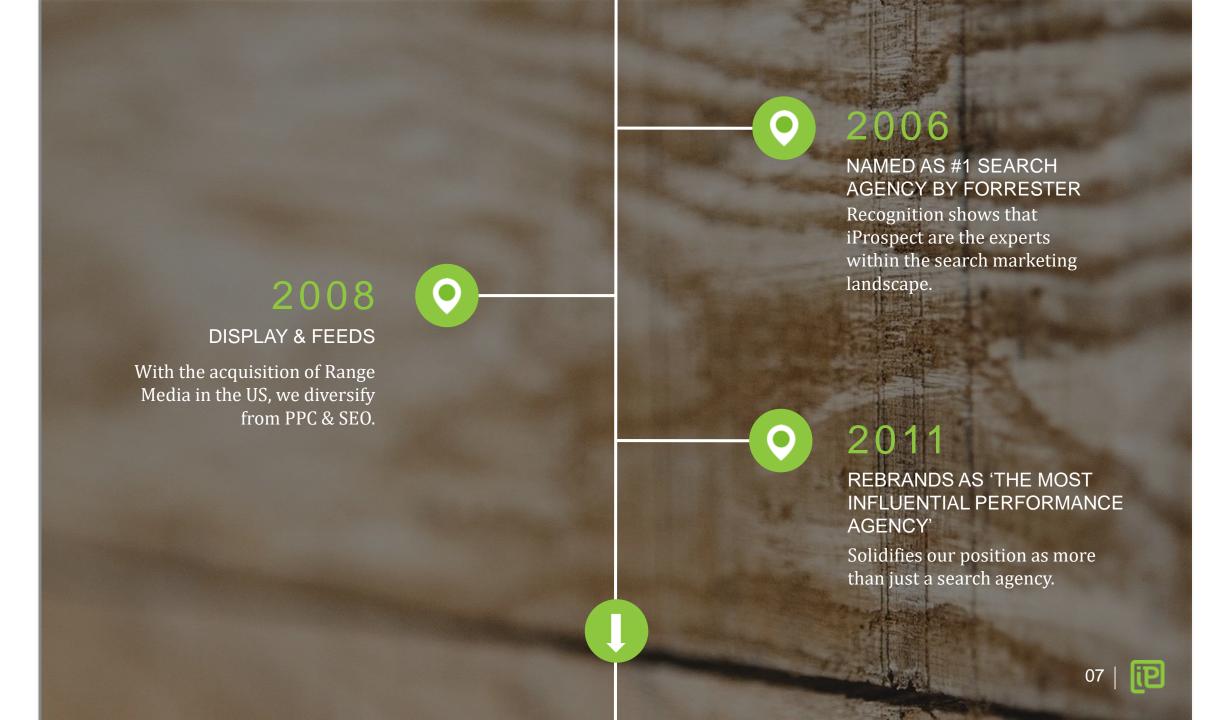




# A Strong Digital Heritage

Building on 20 years of digital experience.





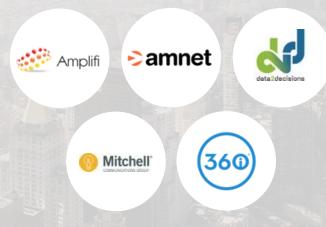


#### dentsu AEGIS network

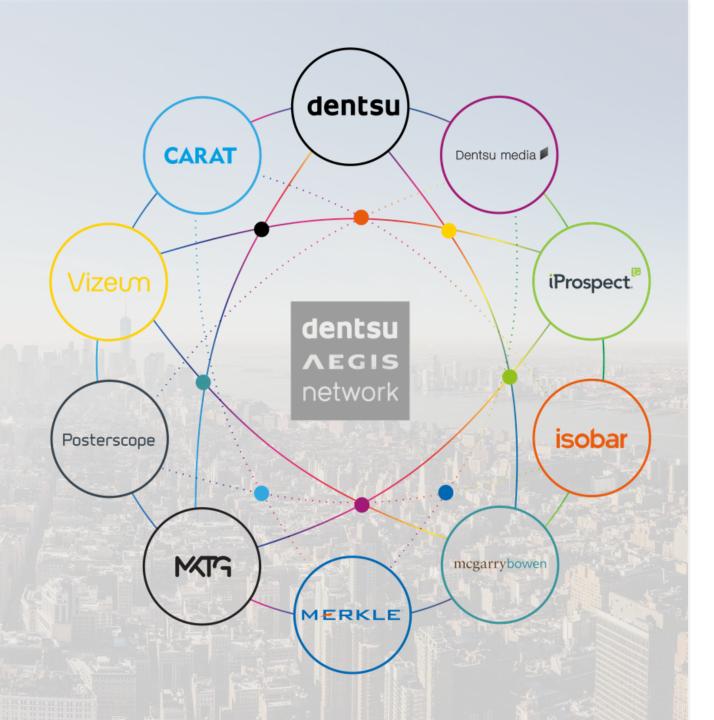
Designed and operated to **COMPLEMENT** and **COLLABORATE** through our ten network brands

35,000 people. 5 continents. 24 time **zones** Pioneering and delivering the most effective brand, media and digital communications solutions for our clients

**SEVEN Specialist Brands** 







# With a Truly Global Team of Passionate Digital Specialists

53

**COUNTRIES** 

70+

LANGUAGES

4,000+

**DIGITAL EXPERTS** 

88

**OFFICES** 

\$2.6bn

**GLOBAL BILLINGS** 

500+

**CLIENTS** 

## What is a Digital Assistant?

A.I

Different Input

Tasks

Multiple Platforms

3<sup>rd</sup> parties



## Siri

Date of Birth: 04/10/2010

Age: 7 years

Residence: iOS, MacOS, TvOS



Choose a category









Staying in Touch



Getting Organized



Sports



Entertainment



Out and About



HomeKit



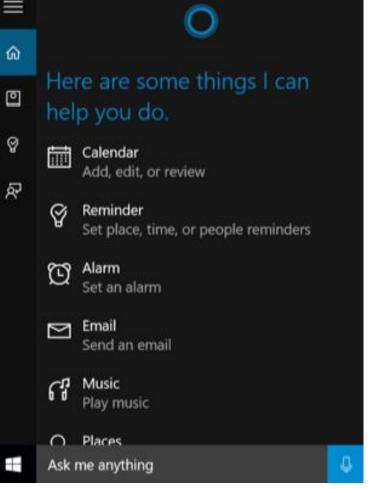
Tips and Tricks



Answers



### Cortana



Date of Birth: 02/04/2014

Age: 2 years

Residence: Windows 10, Android, Xbox OS, iOS



### Alexa

Date of Birth: 02/11/2014

Age: 2 Years

Residence: Amazon Echo, Dot, Android, iOS





Meet Alexa



Music & Entertainment



News & Information



Questions & Answers



Help Around the House



Smart Home



Fun & Games



Shopping



Alexa Skills

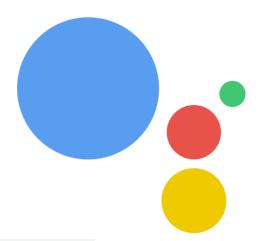


# **Google Assistant**

Date of Birth: 02/05/2016

Age: 1 year

Residence: Android (TV, Auto, Wear), iOS,





Fun I'm bored Recite a poem



Weather What's the weather? How hot is it outside?



Answers How far away i: Venice? Who invented t



News Science news AP Radio news



Places nearby What's the closest gas station? Any ATMs nearby?



Sports
Tell me sports
Who is the fas
man alive?



College basketball Tell me a sports joke



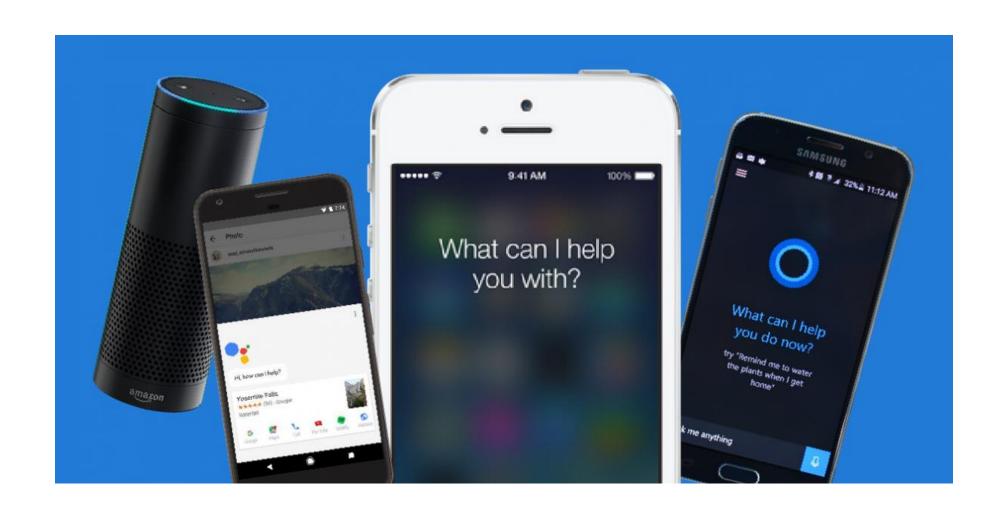
Subscriptions
Send me news daily
Send me poems daily



Games Let's play a ga Trivia games

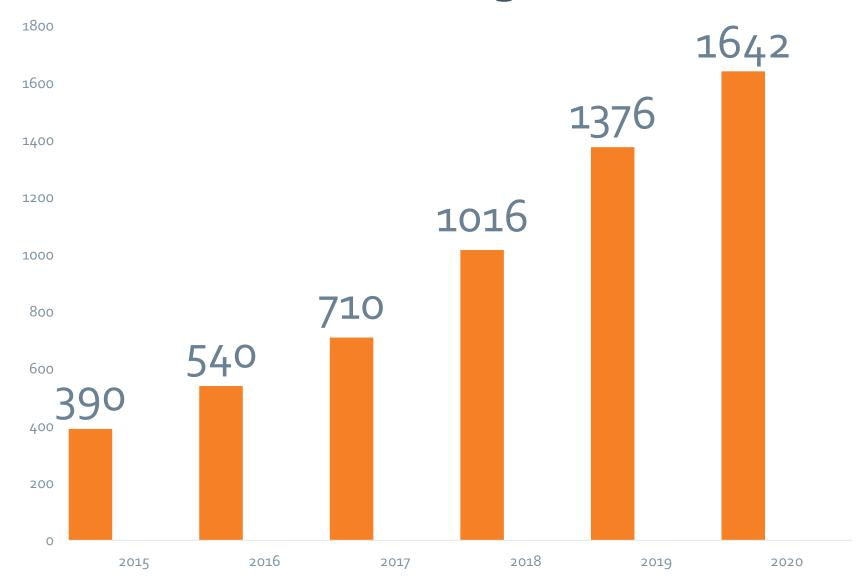


## Who wins?





# The numbers will continue to grow





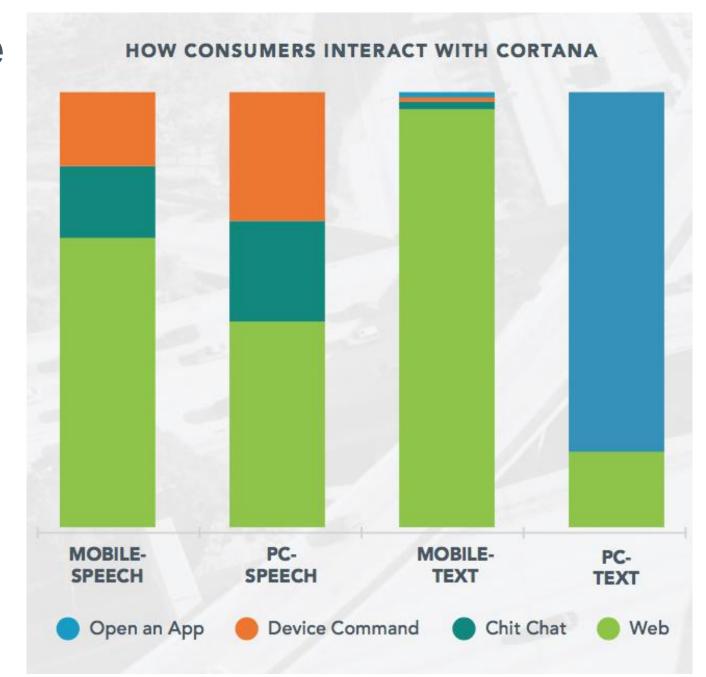
# In 2014... 3 years later?

## 55% of teens and 41% of adults

use voice search more than once a day

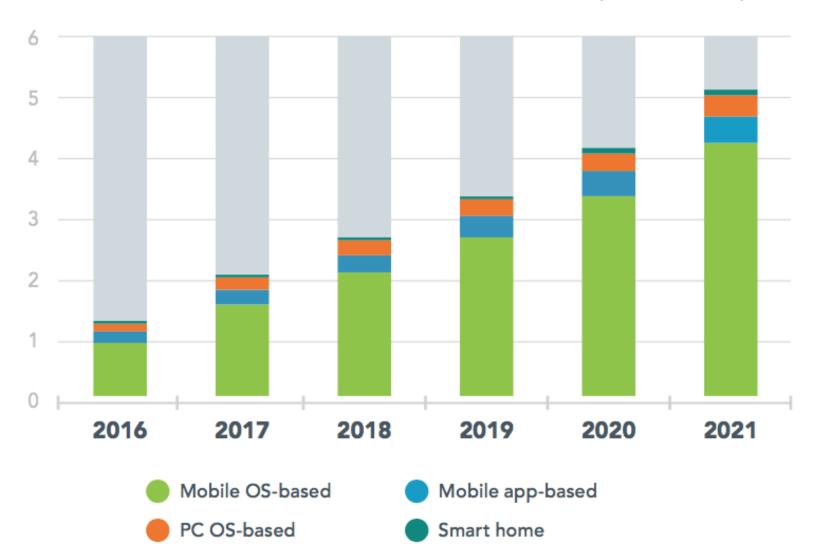


# It's not only about voice



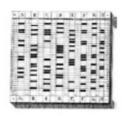
## **Mobile First**

#### GLOBAL DIGITAL ASSISTANTS USE BY PLATFORM (IN MILLIONS)

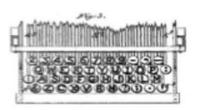




# Human-Computer Interaction (1830s – 2015), USA = Touch 1.0 → Touch 2.0 → Touch 3.0 → Voice



Punch Cards for Informatics 1832



QWERTY Keyboard 1872



Electromechanical Computer (Z3) 1941



Electronic Computer (ENIAC) 1943



Paper Tape Reader (Harvard Mark I) 1944



Mainframe Computers (IBM SSEC) 1948



Trackball 1952



Joystick 1967



Microcomputers (IBM Mark-8) 1974



Portable Computer (IBM 5100) 1975



Commercial Use of Window-Based GUI (Xerox Star) 1981



Commercial Use of Mouse (Apple Lisa) 1983



Commercial Use of Mobile Computing (PalmPilot) 1996



Touch + Camera based Mobile Computing (iPhone 2G) 2007



Voice on Mobile (Siri) 2011



Voice on Connected / Ambient Devices (Amazon Echo) 2014

## **App Overload**

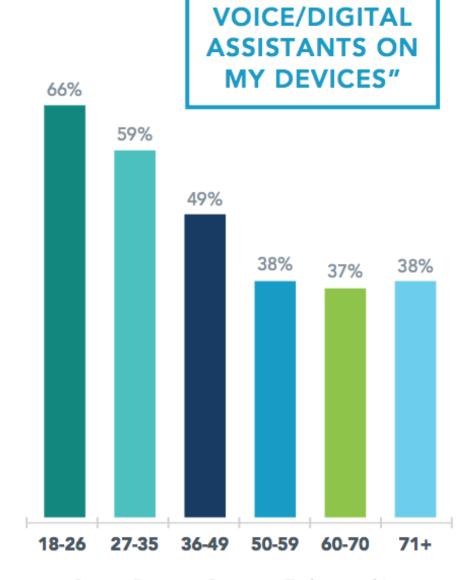
33

Apps installed on device

Time is spent in top 3



## Solution?



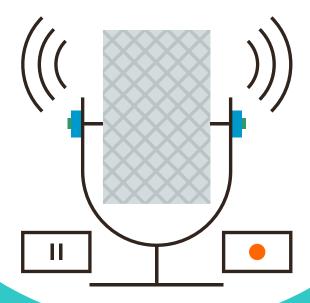
"I USE

Source: Forrester Consumer Technographics North American Technographics Consumer Technology Survey, 2015.

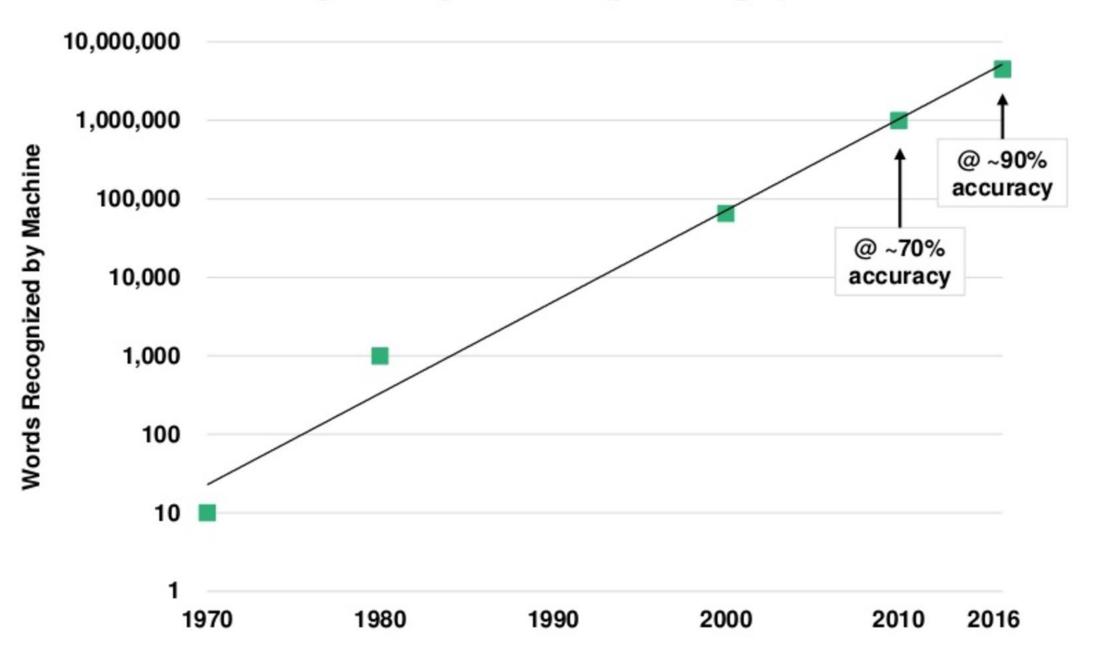


# Voice Search

41% of Adults Use Voice Search Once a Day GOOGLE



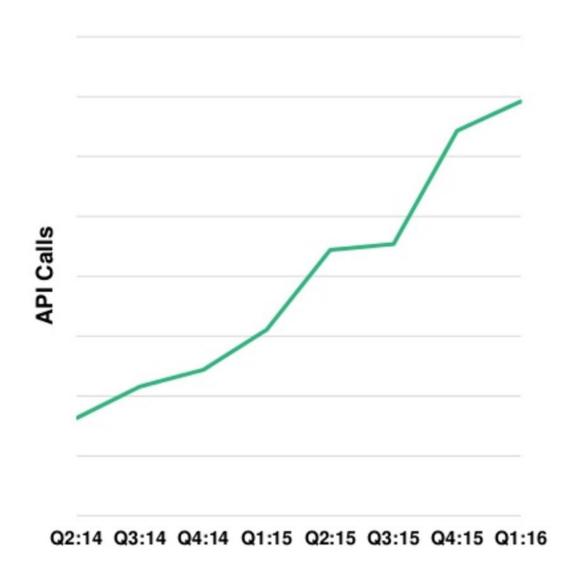
#### Words Recognized by Machine (per Google), 1970 – 2016





Baidu Speech Recognition Daily Usage by API Calls, Global, 2014 – 2016<sup>1</sup>

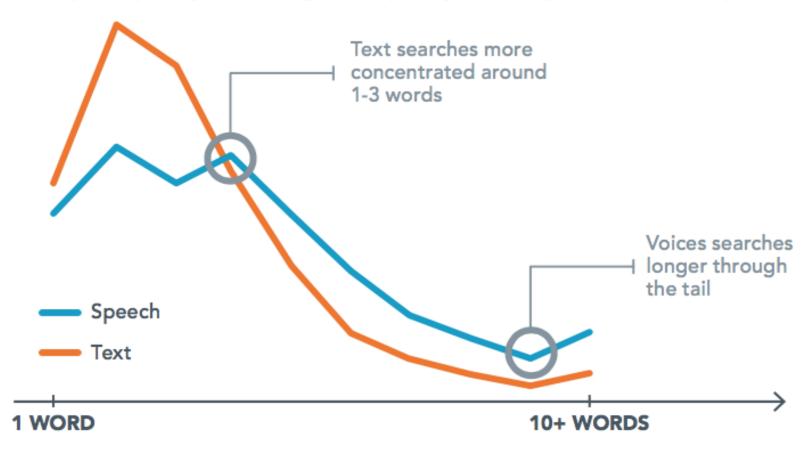
Baidu Text to Speech (TTS) Daily Usage by API Calls, Global, 2014 – 2016<sup>2</sup>



Q2:14 Q3:14 Q4:14 Q1:15 Q2:15 Q3:15 Q4:15 Q1:16

# From Short to Long Tail

#### SEARCH QUERY LENGTH BASED ON SPEECH VS TEXT INPUT

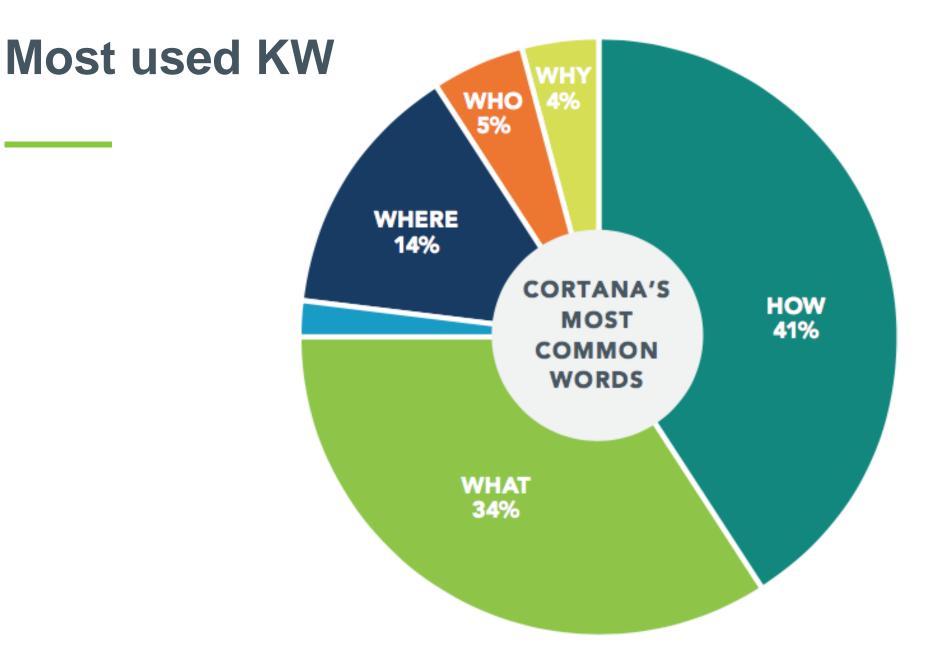


Source: Microsoft Internal Data, December 2016



	TEXT	VOICE
Weather	Weather Weather Channel	What's the weather like today? Do I need an umbrella?
News	News MSN News Fox News	Show me today's news. What are the top headlines? What's the news?
Food Related	Restaurants near me Recipes All Recipes Cooking	Find restaurants near me. Places to eat near me. What should I eat for dinner? Where should I go for lunch? Give me a recipe. How do you cook
Movies	Movies Theaters nearby	What movies are playing near me? When does the next Star Wars movie come out?
Flights	Flight Cheap Flights	What time does <flight> depart? Flight status <flight number="">? What is the price of the cheapest flight to New Orleans?</flight></flight>
Retail	USPS Nordstrom Boots	Where can I buy stamps? Where is the nearest Nordstrom? Where can I buy black waterproof boots in size nine and a half?

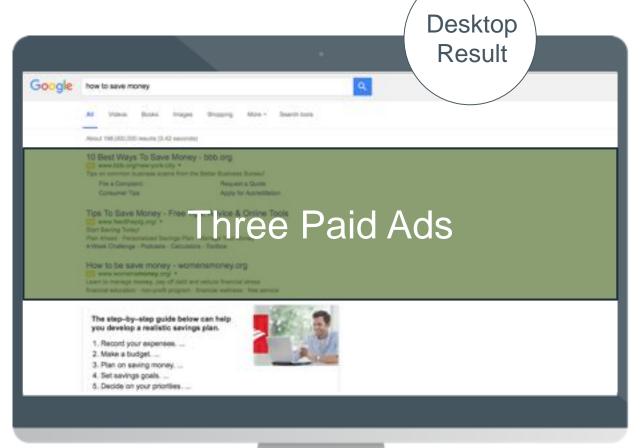


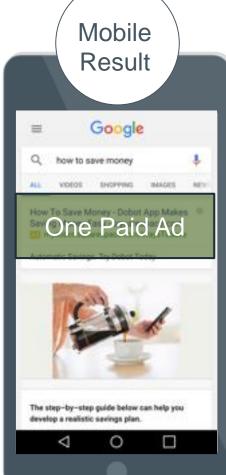


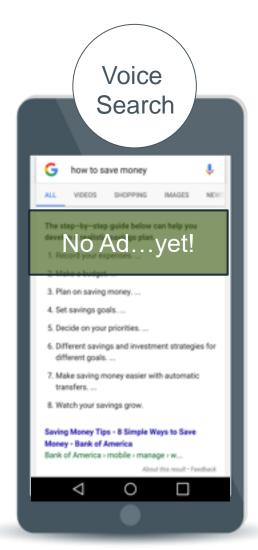




Ranking #1 in Search is Changing



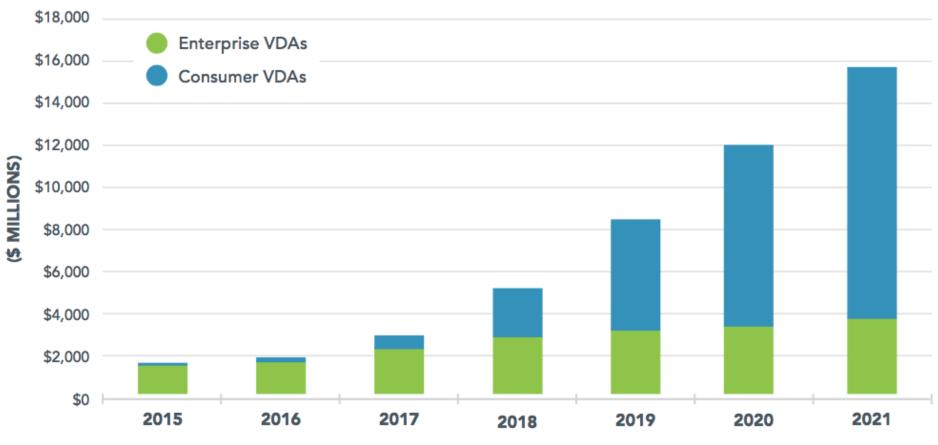






# B2B B2C

#### **TOTAL VDA REVENUE BY SEGMENT, WORLD MARKETS: 2015-2021**







## AI in B2B

#### **Most Widely Used Artificial Intelligence (AI) Technology at Their Company According to US Executives, May 2015**

% of respondents

#### Voice recognition and response solutions 32% **Machine learning** 24% Virtual personal assistants 15% Systems used for decision support 8% **Analytics-focused applications** 5% Automated written reporting and/or communications 5% **Robotics** 4% All of the above 8%



#### GLOBAL DIGITAL ASSISTANT AD SPEND BY PLATFORM

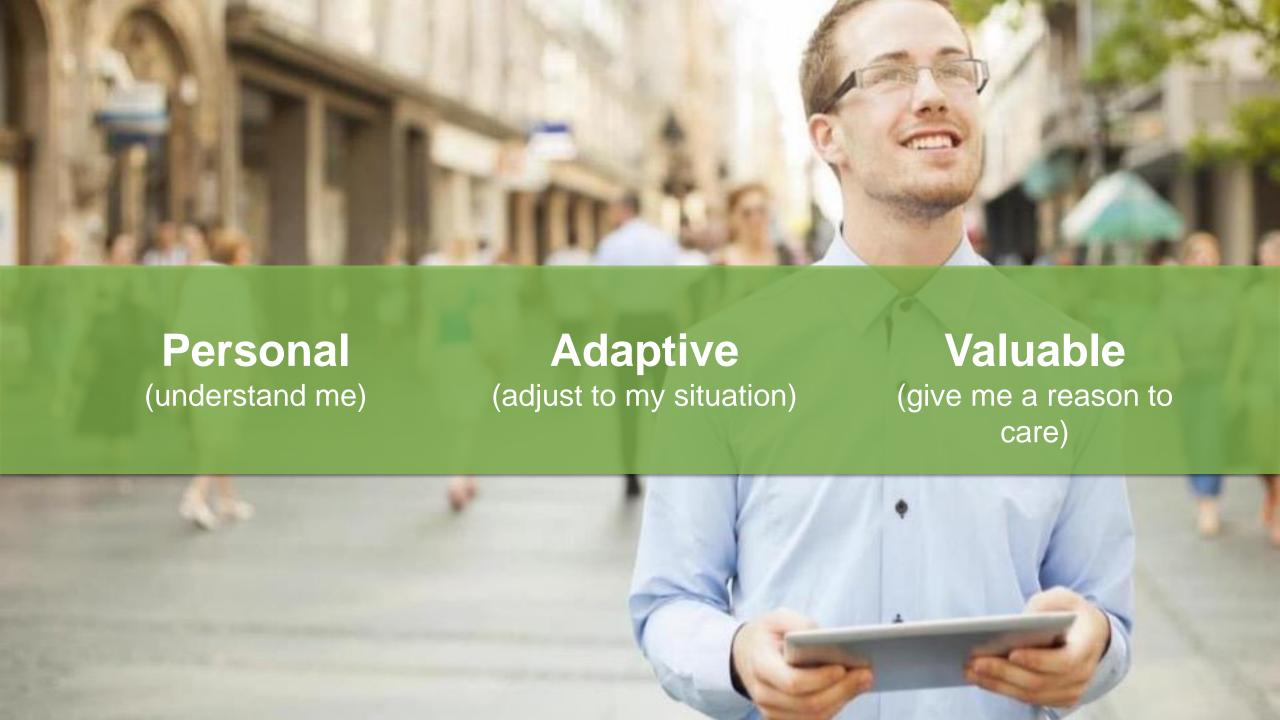












#### **Search Personalization Isn't New...**

#### Wife

Browse A Huge Selection Now Find Exactly What You Want Today www.eBay.com

#### Loneliness

Looking for Loneliness? Find exactly what you want today. www.eBay.com



# ...but it's too often done poorly





How can we sell to them?



How can we connect with them?



(connect)

Become a trusted source of education for all aspects of their business.

> How-to **Advice Tips**

**TOOL** 

(buy)

Make tangible aspects of their business easier through utility.

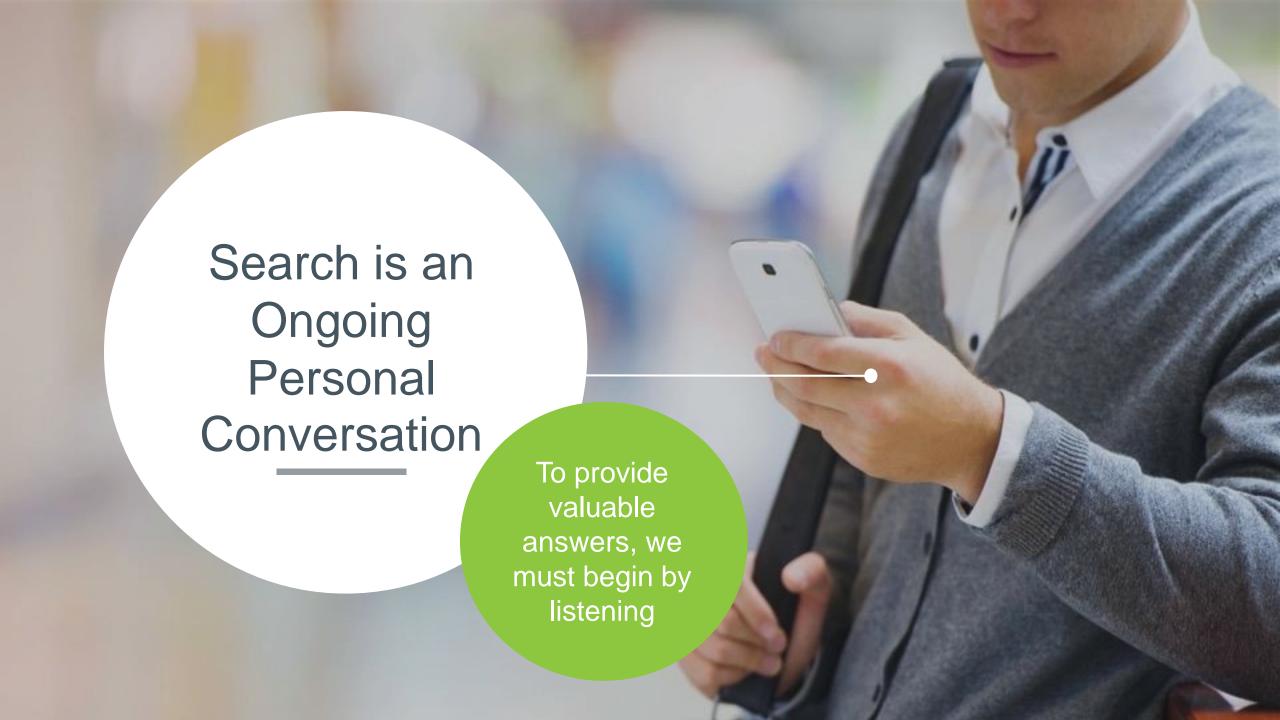
> **Streamline Empower Simplify**

**PARTNER** 

(advocacy)

**Develop habitual** purchase behavior and advocacy within verticals.

> Relationship Loyalty **Trust**



#### WHAT IS GOOGLE SCARED OF?

### [blank]

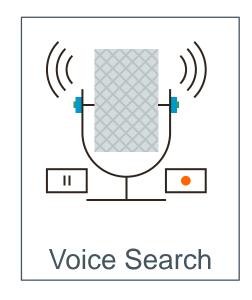
has actually made us very vulnerable because the future is nowhere close to what we earned over 12 years of hard work....

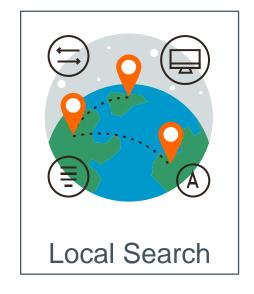
We are having to start from scratch again.

AMIT SINGHAL, SVP, GOOGLE



# Winning in the New Normal











what movie was it that had alie



ALL

SHOPPING

NEWS

IMAGES

VIDEOS

Showing results for what movie was it that has aliens that could be killed by selenium

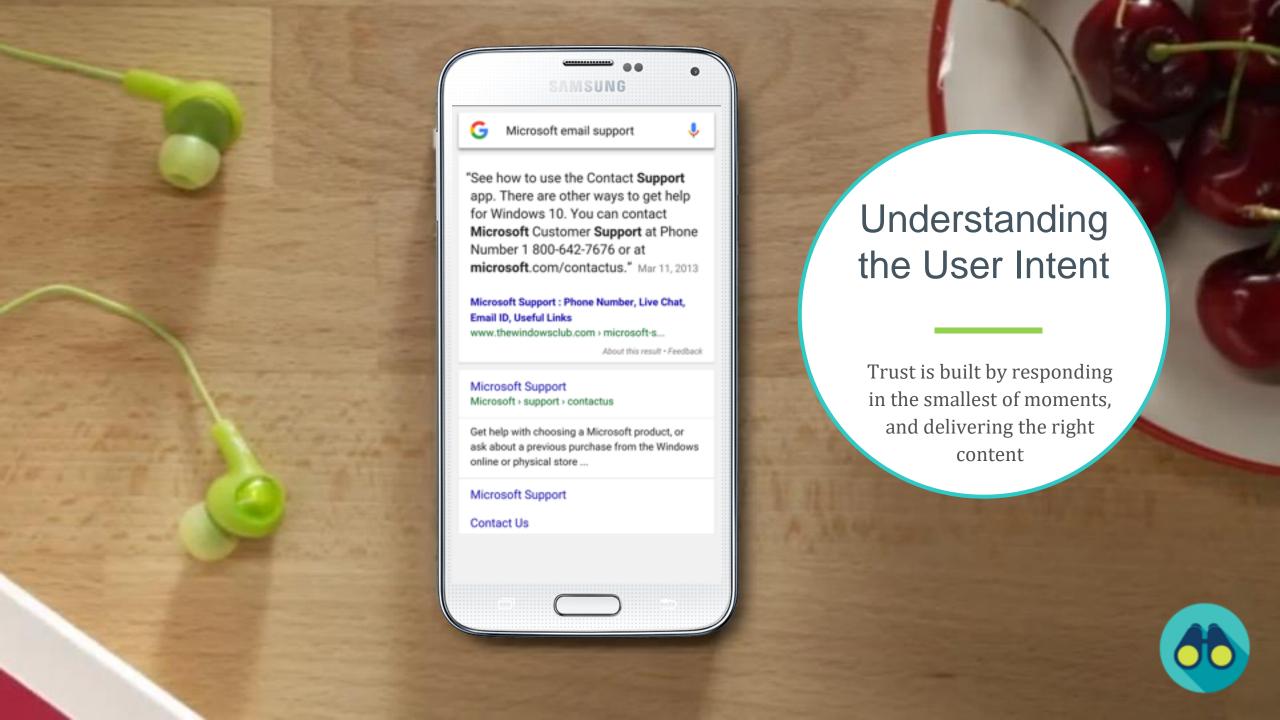
Evolution (2001) - IMDb IMDb > title

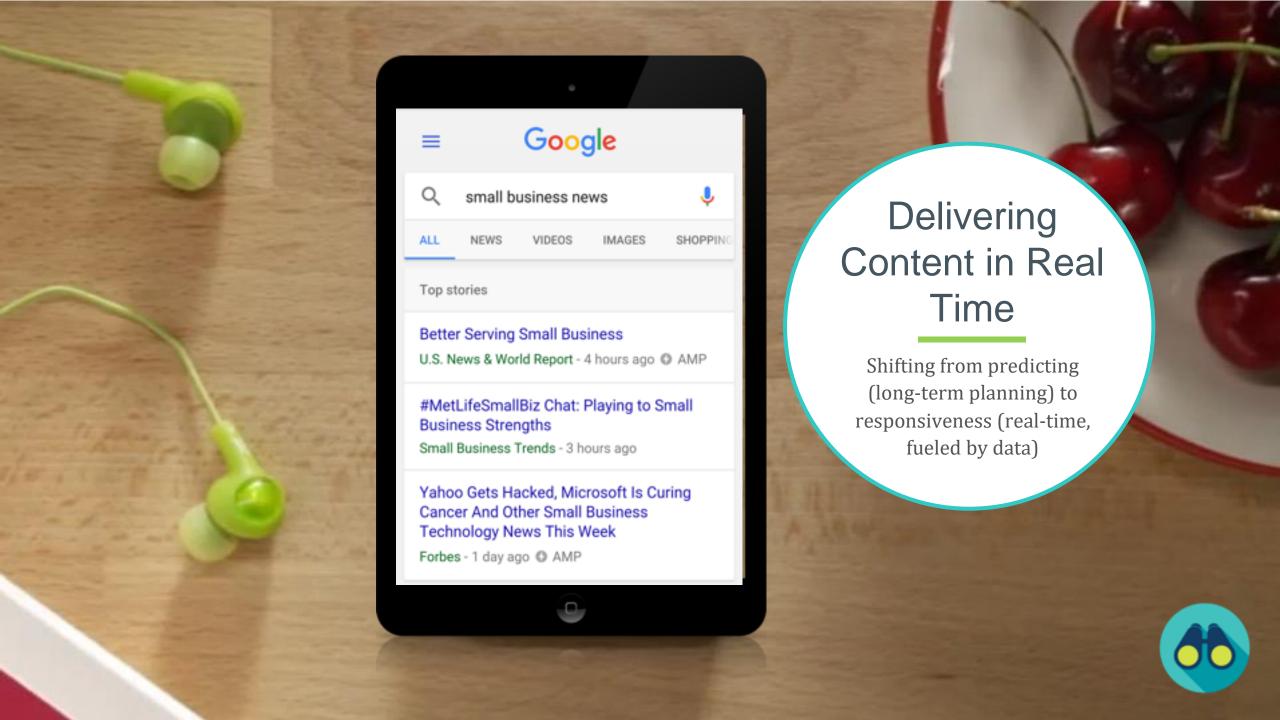


\*\*\*\* Rating: 6/10 - 98,563 votes

Mobile-friendly - A fire-fighting codet two college







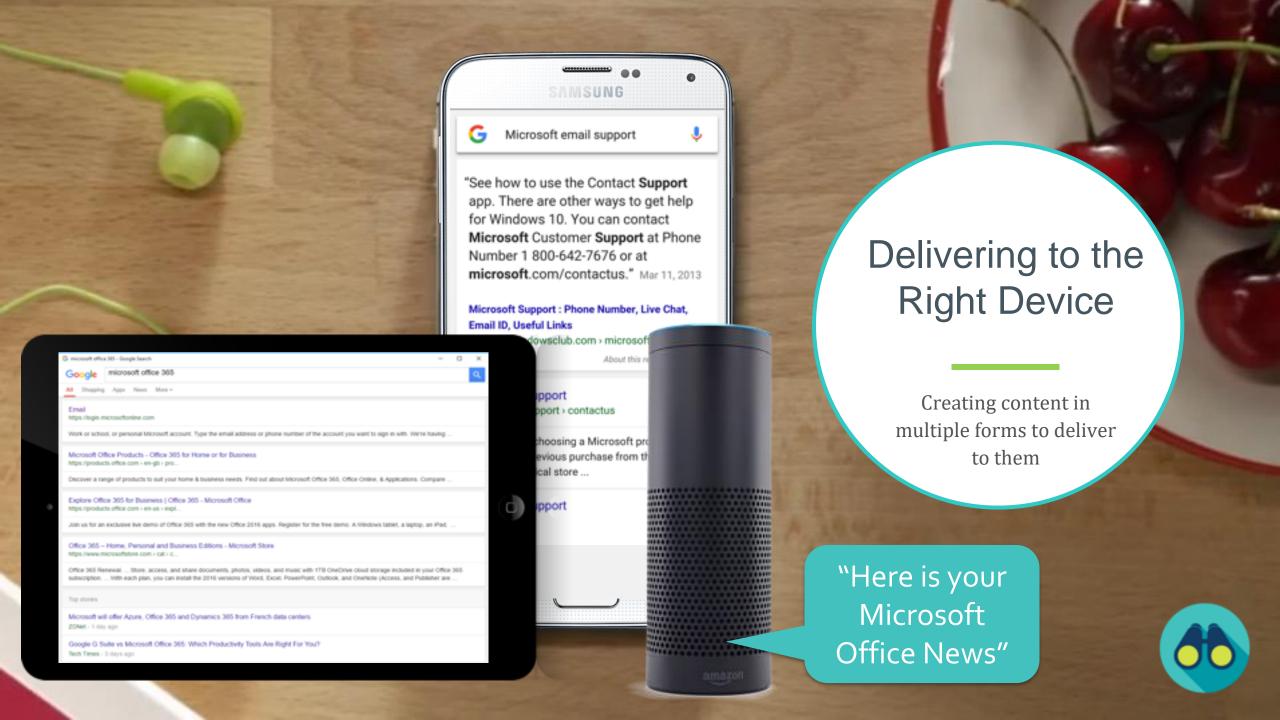




Delivering the Right Experience

Take them from Content engagement to App
Activation





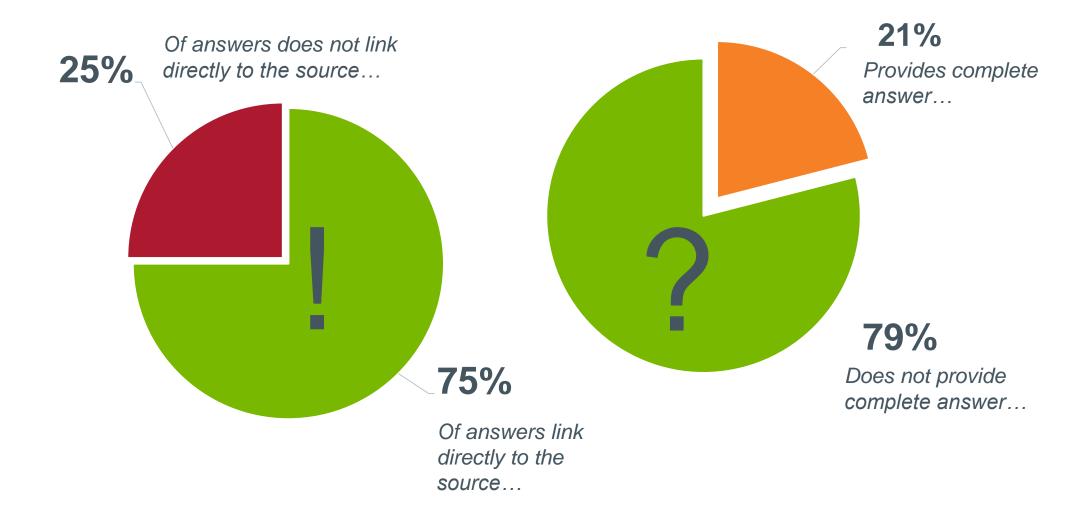
#### **VOICE STILL HAS A WAYS TO GO**







#### THE OPPORTUNITY IS THERE THOUGH





#### **GOOGLE WILL ACCELERATE VOICE ADOPTION**



#### Voice Accelerated

Google home will accelerate the indexation of Voice Content in Google

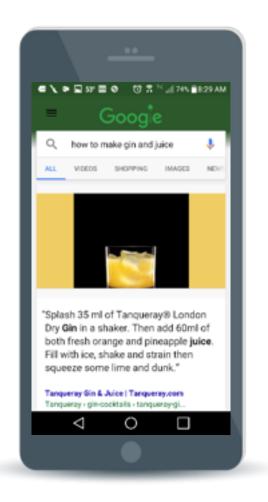
- iProspect 2016



## "Content" Wins for Informational Searches

#### **DIAGEO**

#### 'How to Make Gin and Juice'











#### **Voice Search 101 Gut Check**



Are you building unique question query content to engage with users?



Are you looking at question queries that are relevant to your business?



Are you preparing your structured data to be ready to answer question queries in real time?





# Bank of America

US | SEO, CONTENT CREATION, VOICE SEARCH

- Well targeted, highly optimized and SEO friendly content nurtures eye-level conversation
  - Traffic to BOA.com financial educational pages (the primary pages appearing in the Answer Box) increased 61% YoY; conversions are up 90% YoY

