Cortana, Siri, Alexa, Google Assistant
How the Digital Assistants are changing our world
A Strong Digital Heritage

Building on **20 years** of digital experience.

1996

iPROSPECT FOUNDED

We were founded as a purely specialist search agency in Boston.

2004

AEGIS MEDIA ACQUIRES iPROSPECT

Signifies the start of Search Engine Marketing’s shift towards the mainstream.
2006
NAMED AS #1 SEARCH AGENCY BY FORRESTER
Recognition shows that iProspect are the experts within the search marketing landscape.

2008
DISPLAY & FEEDS
With the acquisition of Range Media in the US, we diversify from PPC & SEO.

2011
REBRANDS AS ‘THE MOST INFLUENTIAL PERFORMANCE AGENCY’
Solidifies our position as more than just a search agency.
2013
DENTSU ACQUIRES AEGIS MEDIA
Boosts our Asia Pacific operations with an even stronger foothold in challenging markets such as China, Japan and Korea.

2014
RANKED AS #1 GLOBAL DIGITAL PERFORMANCE AGENCY BY RECMA
Shows that we continue to strengthen our influence across the globe as we lead and define the performance media landscape.

2016
BUILDING ON 20 YEARS OF DIGITAL EXPERIENCE
We continue to reinvent ourselves with a new tagline, ‘Driving Business Performance’. Delivering strategic consulting powered by our executional excellence.
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

Plus 55 Leading Local Brands
With a Truly Global Team of Passionate Digital Specialists

53 COUNTRIES
70+ LANGUAGES
4,000+ DIGITAL EXPERTS

88 OFFICES
$2.6 bn GLOBAL BILLINGS
500+ CLIENTS
What is a Digital Assistant?

- A.I
- Different Input
- Tasks
- Multiple Platforms
- 3rd parties
Siri

Date of Birth: 04/10/2010
Age: 7 years
Residence: iOS, MacOS, TVOS
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
Google Assistant

Date of Birth: 02/05/2016
Age: 1 year
Residence: Android (TV, Auto, Wear), iOS,
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
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

80%

Time is spent in top 3
Solution?

“I USE VOICE/DIGITAL ASSISTANTS ON MY DEVICES”

Source: Forrester Consumer Technographics
41% of Adults Use Voice Search Once a Day

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

@ ~90% accuracy

@ ~70% accuracy
From Short to Long Tail

Search Query Length Based on Speech vs Text Input

Text searches more concentrated around 1-3 words

Voices searches longer through the tail

Source: Microsoft Internal Data, December 2016
<table>
<thead>
<tr>
<th>TEXT</th>
<th>VOICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weather</td>
<td>Weather</td>
</tr>
<tr>
<td></td>
<td>Weather Channel</td>
</tr>
<tr>
<td></td>
<td>What’s the weather like today?</td>
</tr>
<tr>
<td></td>
<td>Do I need an umbrella?</td>
</tr>
<tr>
<td>News</td>
<td>News</td>
</tr>
<tr>
<td></td>
<td>MSN News</td>
</tr>
<tr>
<td></td>
<td>Fox News</td>
</tr>
<tr>
<td></td>
<td>Show me today’s news.</td>
</tr>
<tr>
<td></td>
<td>What are the top headlines?</td>
</tr>
<tr>
<td></td>
<td>What’s the news?</td>
</tr>
<tr>
<td>Food Related</td>
<td>Restaurants near me</td>
</tr>
<tr>
<td></td>
<td>Recipes</td>
</tr>
<tr>
<td></td>
<td>All Recipes</td>
</tr>
<tr>
<td></td>
<td>Cooking</td>
</tr>
<tr>
<td></td>
<td>Find restaurants near me.</td>
</tr>
<tr>
<td></td>
<td>Places to eat near me.</td>
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<tr>
<td></td>
<td>What should I eat for dinner?</td>
</tr>
<tr>
<td></td>
<td>Where should I go for lunch?</td>
</tr>
<tr>
<td></td>
<td>Give me a recipe.</td>
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<tr>
<td></td>
<td>How do you cook...</td>
</tr>
<tr>
<td>Movies</td>
<td>Movies</td>
</tr>
<tr>
<td></td>
<td>Theaters nearby</td>
</tr>
<tr>
<td></td>
<td>What movies are playing near me?</td>
</tr>
<tr>
<td></td>
<td>When does the next Star Wars movie come out?</td>
</tr>
<tr>
<td>Flights</td>
<td>Flight</td>
</tr>
<tr>
<td></td>
<td>Cheap Flights</td>
</tr>
<tr>
<td></td>
<td>What time does &lt;flight&gt; depart?</td>
</tr>
<tr>
<td></td>
<td>Flight status &lt;flight number&gt;?</td>
</tr>
<tr>
<td></td>
<td>What is the price of the cheapest flight to New Orleans?</td>
</tr>
<tr>
<td>Retail</td>
<td>USPS</td>
</tr>
<tr>
<td></td>
<td>Nordstrom</td>
</tr>
<tr>
<td></td>
<td>Boots</td>
</tr>
<tr>
<td></td>
<td>Where can I buy stamps?</td>
</tr>
<tr>
<td></td>
<td>Where is the nearest Nordstrom?</td>
</tr>
</tbody>
</table>
|              | Where can I buy black waterproof boots in size nine and a half?
Most used KW

- CORTANA'S MOST COMMON WORDS: 41%
- WHAT: 34%
- WHERE: 14%
- WHO: 5%
- WHY: 4%

Source: Microsoft Internal Data, December 2016
Ranking #1 in Search is Changing

Desktop Result

Mobile Result

Voice Search

Three Paid Ads

One Paid Ad

No Ad...yet!
TOTAL VDA REVENUE BY SEGMENT, WORLD MARKETS: 2015-2021

- Enterprise VDAs (green)
- Consumer VDAs (blue)

Source: Tractica
<table>
<thead>
<tr>
<th>Technology Type</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice recognition and response solutions</td>
<td>32%</td>
</tr>
<tr>
<td>Machine learning</td>
<td>24%</td>
</tr>
<tr>
<td>Virtual personal assistants</td>
<td>15%</td>
</tr>
<tr>
<td>Systems used for decision support</td>
<td>8%</td>
</tr>
<tr>
<td>Analytics-focused applications</td>
<td>5%</td>
</tr>
<tr>
<td>Automated written reporting and/or communications</td>
<td>5%</td>
</tr>
<tr>
<td>Robotics</td>
<td>4%</td>
</tr>
<tr>
<td>All of the above</td>
<td>8%</td>
</tr>
</tbody>
</table>
GLOBAL DIGITAL ASSISTANT AD SPEND BY PLATFORM

($ BILLIONS)

Marketing to Machines

Personal Assistants will select your product, service or information provider for you.
A variable APR is calculated by adding a set number determined by the credit card issuer (called the margin) to a reference rate (called the index) such as the U.S. Prime Rate. When the Prime Rate goes up or down, your variable APR may change, depending on whether your issuer updates your rates monthly or quarterly.
Personal (understand me)
Adaptive (adjust to my situation)
Valuable (give me a reason to care)
Search Personalization Isn’t New…

…but it’s too often done poorly
How can we sell to them?

How can we connect with them?
RESOURCE
(connect)
Become a trusted source of education for all aspects of their business.

TOOL
(buy)
Make tangible aspects of their business easier through utility.

PARTNER
(advocacy)
Develop habitual purchase behavior and advocacy within verticals.

How-to Advice Tips
Streamline Empower Simplify
Relationship Loyalty Trust
Search is an Ongoing Personal Conversation

To provide valuable answers, we must begin by listening
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

- Voice Search
- Local Search
- App Marketing
what movie was it that had aliens that could be killed by selenium

Evolution (2001) - IMDb
IMDb › title

Rating: 6/10 - 98,563 votes
Mobile-friendly - A fire-fighting cadet, two college students, and an even more surprising co-star must save humanity from an apocalyptic bio-terrorist event.
Understanding the User Intent

Trust is built by responding in the smallest of moments, and delivering the right content.
Delivering Content in Real Time

Shifting from predicting (long-term planning) to responsiveness (real-time, fueled by data)
Delivering the Right Experience

Take them from Content engagement to App Activation
Delivering to the Right Device

Creating content in multiple forms to deliver to them

“Here is your Microsoft Office News”
VOICE STILL HAS A WAYS TO GO

Voice Answered

Only 56% of Question Queries have Voice Search Answers
- Brightedge
THE OPPORTUNITY IS THERE THOUGH

25% Of answers does not link directly to the source...

75% Of answers link directly to the source...

21% Provides complete answer...

79% Does not provide complete answer...
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

‘How to Make Gin and Juice’
Voice Search 101 Gut Check

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

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

3. 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