SMART SPEAKERS

WELCOME TO THE AGE OF ASK...

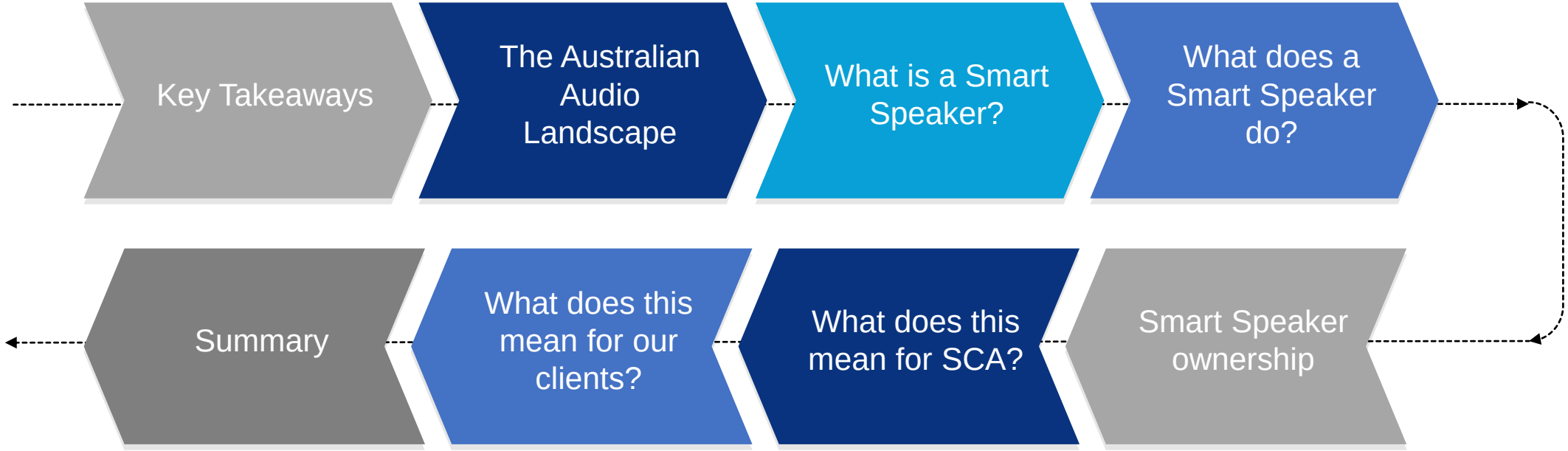
2018

SCA research & insights

SOUTHERN CROSS AUSTEREO
absolutely engaging

WHERE WE WILL TAKE YOU

SOUTHERN CROSS AUSTEREO RESEARCH



KEY TAKEAWAYS

SOUTHERN CROSS AUSTEREO RESEARCH

Smart Speaker uptake is still in its infancy in Australia

- With only **5%** penetration, Australia is far behind the USA (17%) and Canada (8%) in terms of Smart Speaker ownership.
- The **25-54** age group are the most likely to own a Smart Speaker in Australia currently.

People are listening to more audio since owning a Smart Speaker

- 70% of Americans are listening to **more audio** since owning their Smart Speaker.
- 28% of Americans are now listening to **more news/talk** since getting their Smart Speaker.
- **Music streaming** is the most common interaction Smart Speaker owners are having with their device.

Smart Speakers are giving brands a new personality

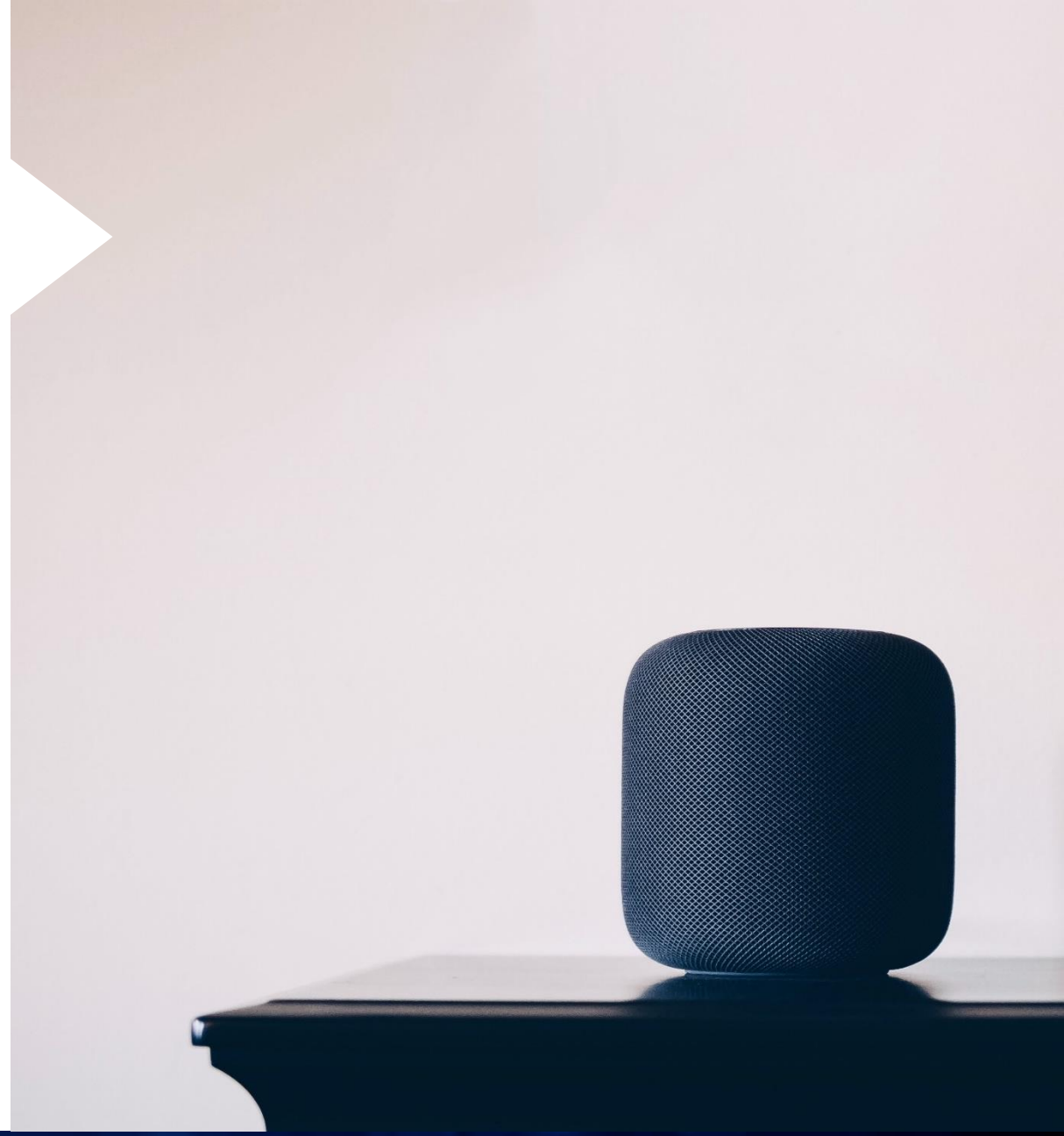
- Smart Speaker are becoming another member of the family, with consumers attaching **human-like traits** to their device.
- Humans have developed **four emotional spaces** that Smart Speakers provide them with – provide trust & reliance, provide the ability to control, provide fun, and provide emotion & intimacy.
- These devices allow brands to create a **deeper**, more **engaged** relationship with their consumers.

What is a Smart Speaker?

What is a Smart Speaker?

A Smart Speaker is a device that can be connected via WiFi or Bluetooth to play music, provide answers when verbally spoken to, or even control parts of the home via a built-in "home assistance" feature.

These devices are the latest technological advances in the minds of marketers worldwide. Whether it’s being used as a source of music, entertainment, or information, there’s no ignoring the speed of their uptake in the global market, as well as closer to home in the Australian market.



Source: Lauren Vetrano. 2018. Alexa: who are Smart Speaker owners?

There are four major players in the Australian market today.

Amazon Echo

When: *Amazon* released the Amazon Echo into the Australian market in February 2018.

What: There are currently 4 models in market: Amazon Echo ($149), Echo Dot ($79), Echo Plus ($229), Echo Spot ($199).

Who: The Amazon Echo uses “Alexa”.

When: *Google* released the Google Home into the Australian market in July 2017.

What: There are currently 3 models in market: Google Home ($199), Google Home Mini ($79), Google Home Max ($549).

Who: The Google Home uses the “Google Assistant”.

Google Home

Apple HomePod

When: *Apple* released the Apple HomePod into the Australian market in February 2018.

What: There is currently 1 model in market: Apple HomePod ($499).

Who: The Apple HomePod uses “Siri”.

When: *Sonos* released the Sonos One into the Australian market in October 2017.

What: There are currently 4 models in market: Sonos One ($299), Play:1 ($299), Play:3 ($379), Play:5 (749).

Who: The Sonos Smart Speakers use the Amazon “Alexa”.

Sonos

Source: 1. Amazon Australia. 2018. 2. Google Australia. 2018. 3. Apple Australia. 2018. 4. Sonos Australia. 2018.

The Australian Audio Landscape

THE CURRENT AUDIO LANDSCAPE

Despite very strong headlines, Smart Speakers are still only in their very early stages of adoption and usage.

To fully understand the future, we need to know what the current Audio Landscape is like.

Which mediums are the strongest at the moment in terms of both reach (**Penetration**) and amount of listening (**Consumption**).

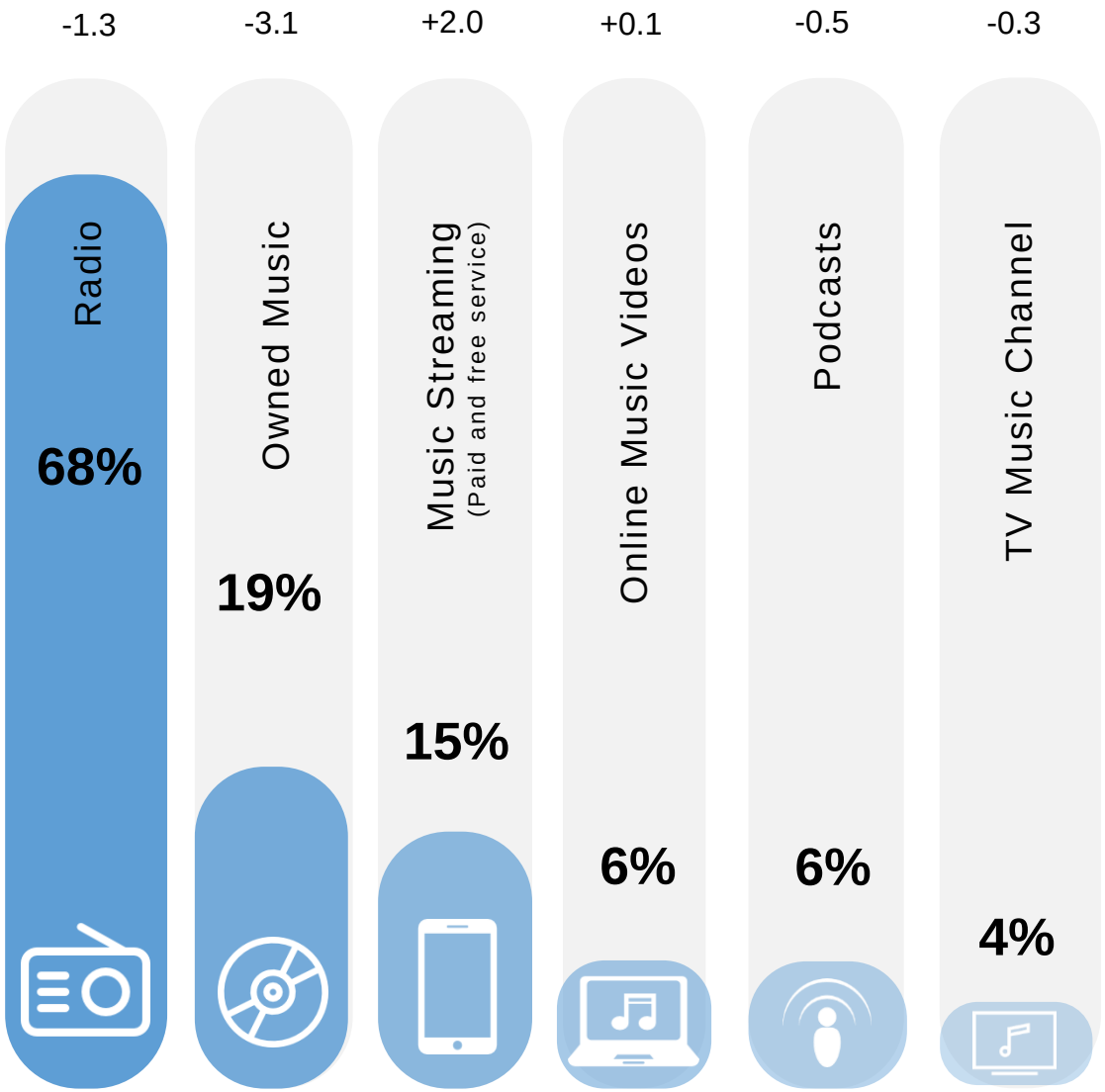
That information is already available through industry currency data (‘Share of Audio’) from GfK and it provides a deep understanding of the Penetration and Consumption landscape.

Radio has 4 times the daily reach of the combined streaming services

Radio is still king when it comes to Australian share of audio.

Music streaming (Spotify, Apple Music) is seeing the largest increases in this space, however currently has the 3rd highest share of audio.

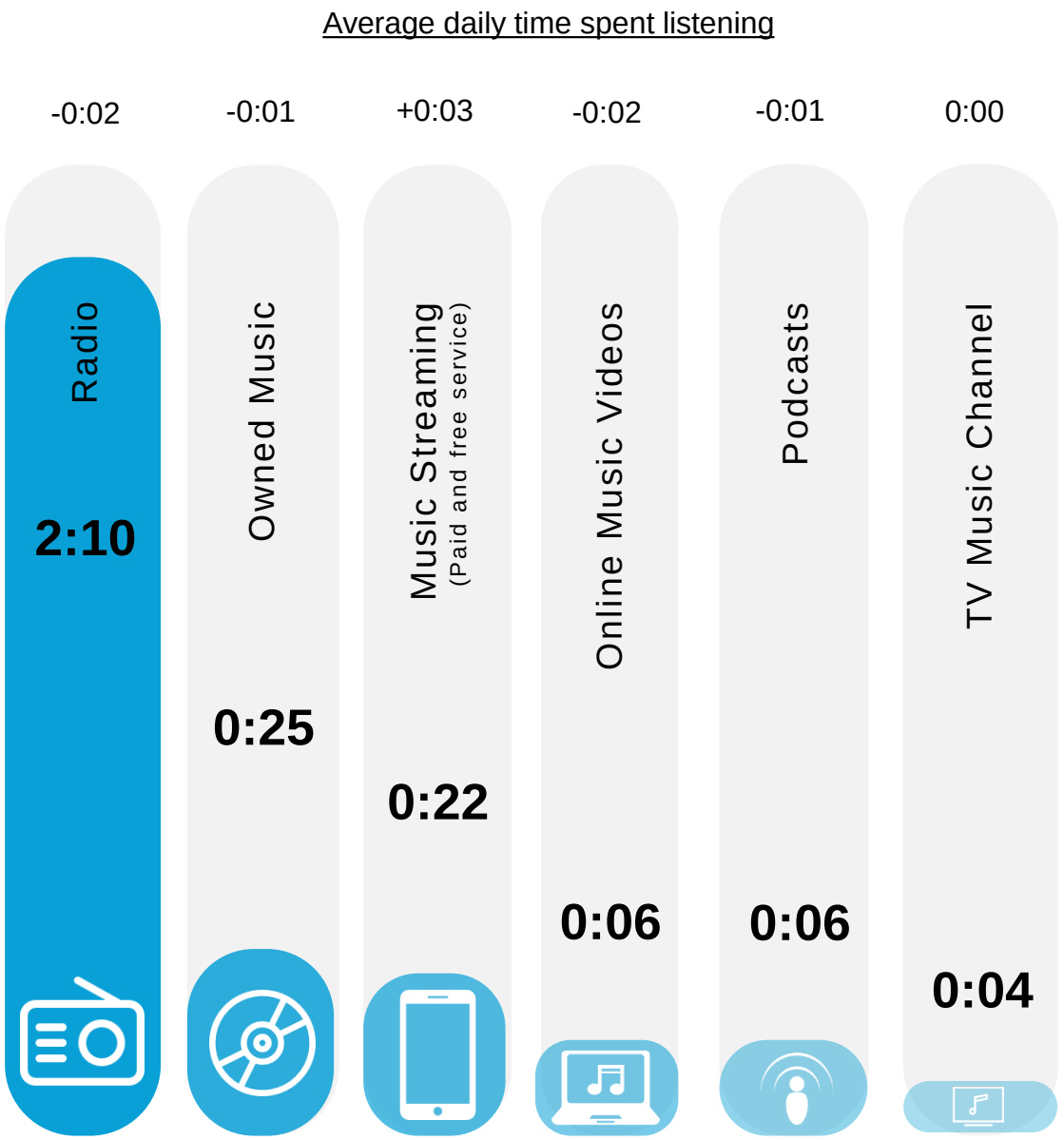
Share of Audio – % people who listen daily (daily reach)



Source: GfK Share of Audio 2017, P10+

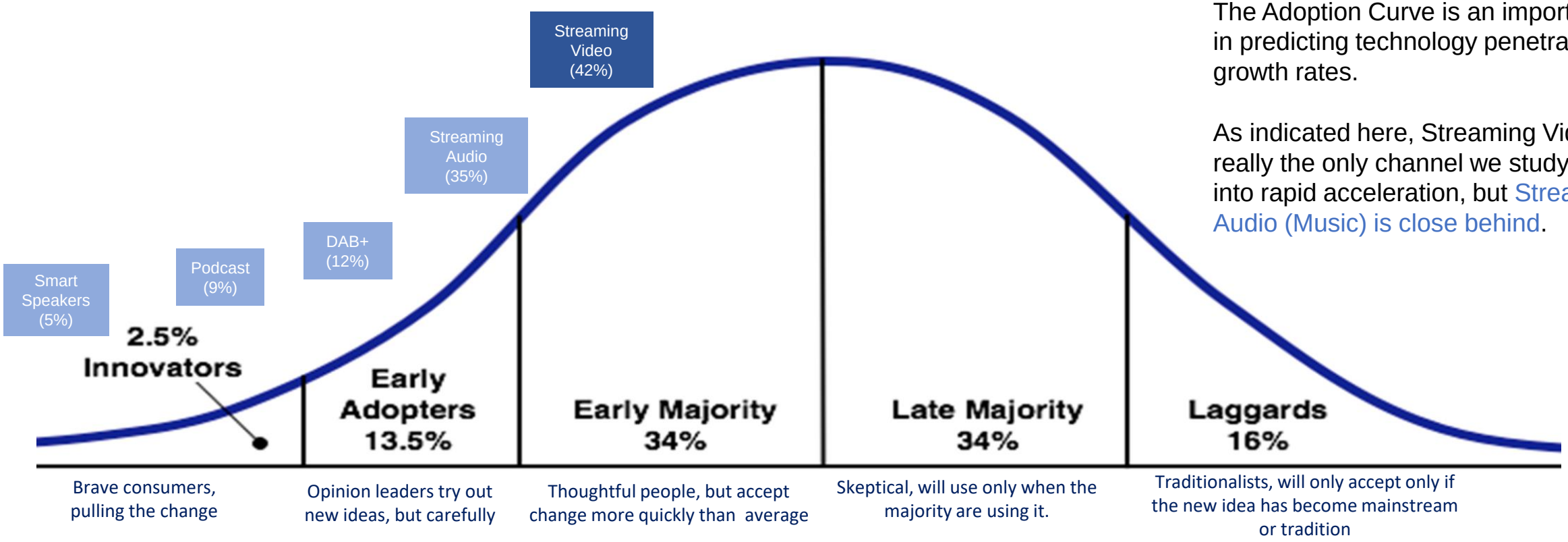
Radio continues to dominate, with listening six times longer than the streaming services combined

Music streaming (Spotify, Apple Music) is seeing the largest increases in this space, however currently has the 3rd highest average daily time spent listening.



Source: GfK Share of Audio 2017, P10+, Hrs:Mins

Rogers Innovation Adoption Curve: Based on Past 7 Days Usage



The Adoption Curve is an important tool in predicting technology penetration & growth rates.

As indicated here, Streaming Video is really the only channel we study entering into rapid acceleration, but Streaming Audio (Music) is close behind.

Source: SCAR Digital Media Report, November 2017, All People 18-54, National Metro Markets. N=1487 Q: "And which of the following audio or video services have you used in the past 7 days?"

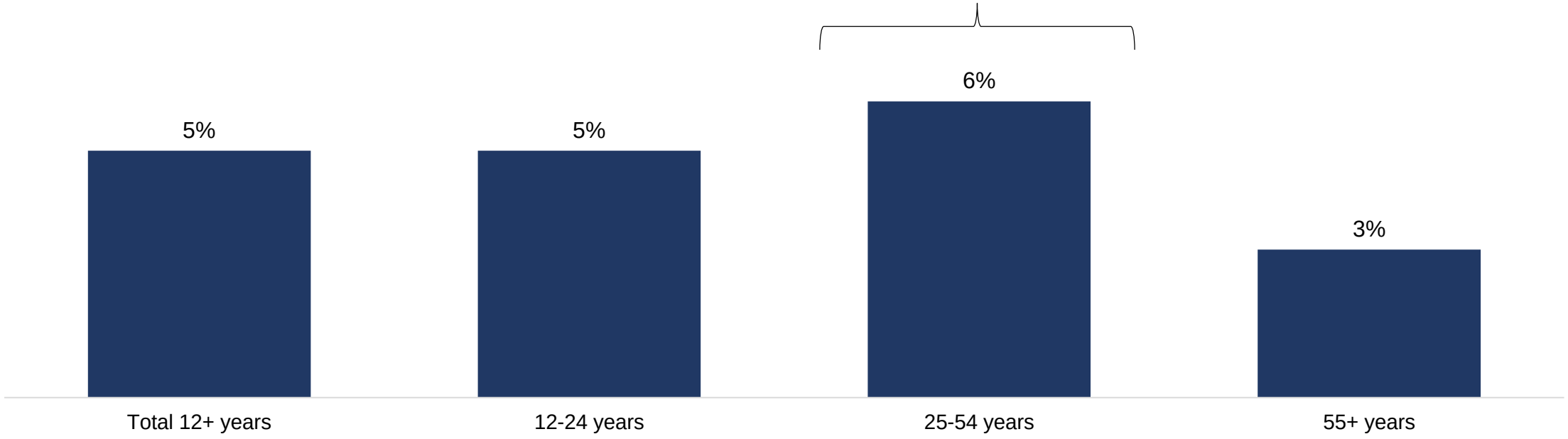
Smart Speaker ownership

Smart Speaker ownership in Australia is still in its infancy currently.

AUSTRALIA

Ownership [2018]

While there's still very low Smart Speaker penetration in Australia, people aged 25-54 are the most likely age group to own a Smart Speaker currently.



*Please note these results are based on **People 12+ living in Australia**

Source: Edison Research. 2018. The Infinite Dial Australia 2018 (People 12+ N=1009. National)

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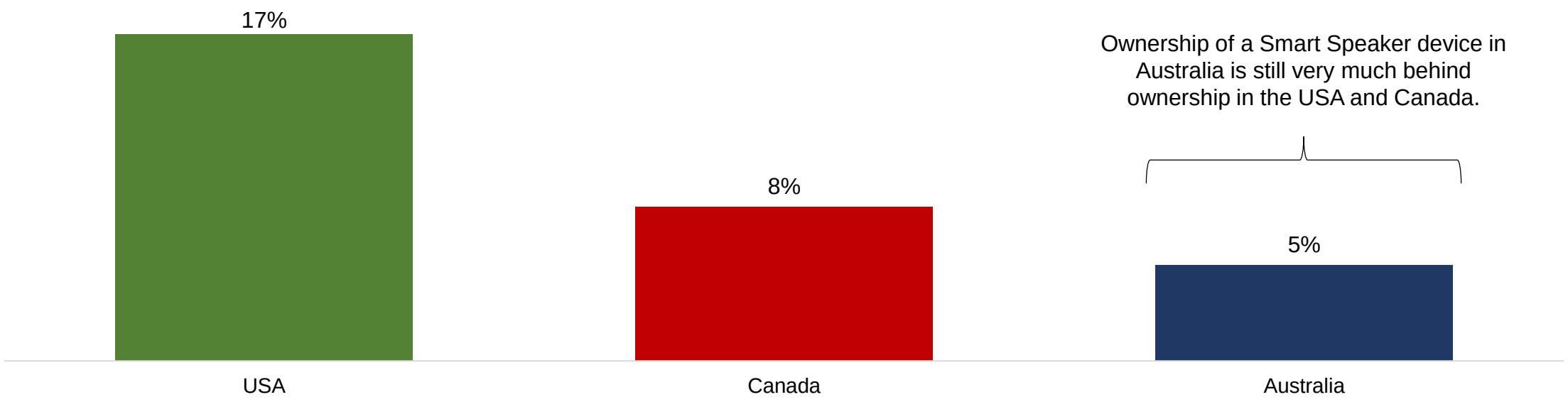
Smart Speaker ownership in Australia is still behind ownership in the USA and Canada currently.

Ownership [2018]



*Please note these results are based on **People 18+**

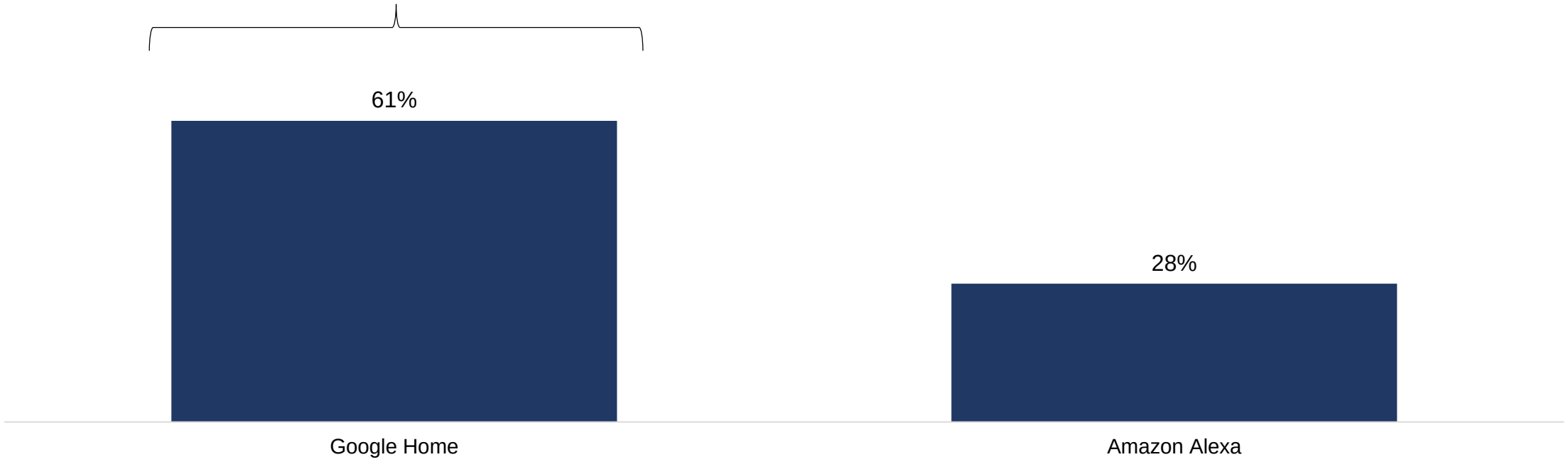
Source: Edison Research. 2018. The Infinite Dial Australia 2018 (People 12+ N=1009. National)

Looking at Smart Speaker awareness, the Google Home has had a strong head start in the Australian market.

AUSTRALIA

Awareness [2018]

3 in 5 Australians are aware of the Google Home, while only 1 in 4 are aware of the Amazon Alexa.



*Please note these results are based on **People 12+ living in Australia**

Source: Edison Research. 2018. The Infinite Dial Australia 2018 (People 12+ N=1009. Australia)

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83% of SCA listeners are aware of at least one Smart Speaker device.

AUSTRALIA

*Please note these results are based on **People 18+ SCA listeners living in Australia**

Source: SCA Research. 2018. Audio Landscapes Study (People 18+ N=7025, Hit listeners 18+ N=3478, Triple M listeners 18+ N=3547. National)

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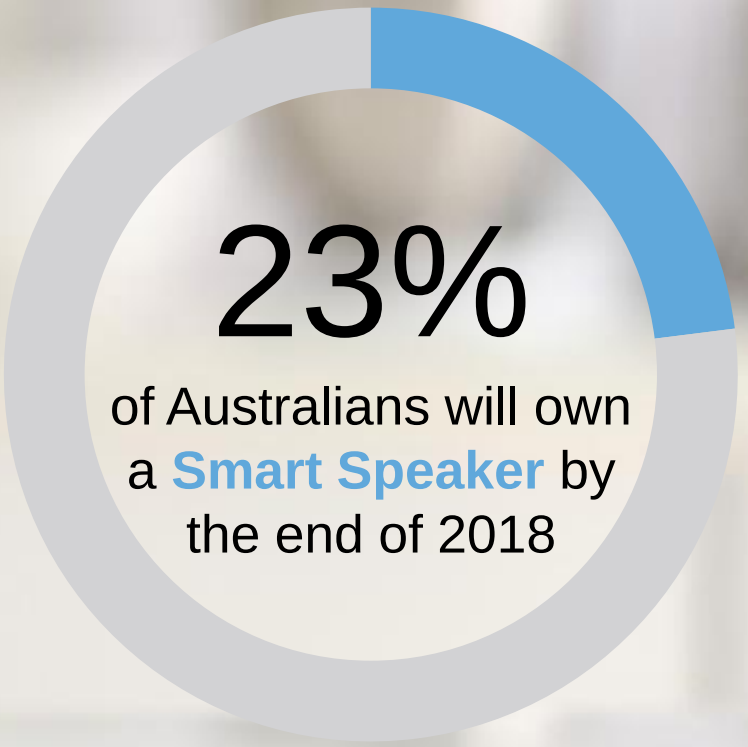
SCA research & insights

But Smart Speaker ownership is predicted to increase quickly…

AUSTRALIA

Half a million Australian households currently own a Smart Speaker device, with predictions to hit 3 million households by 2022.

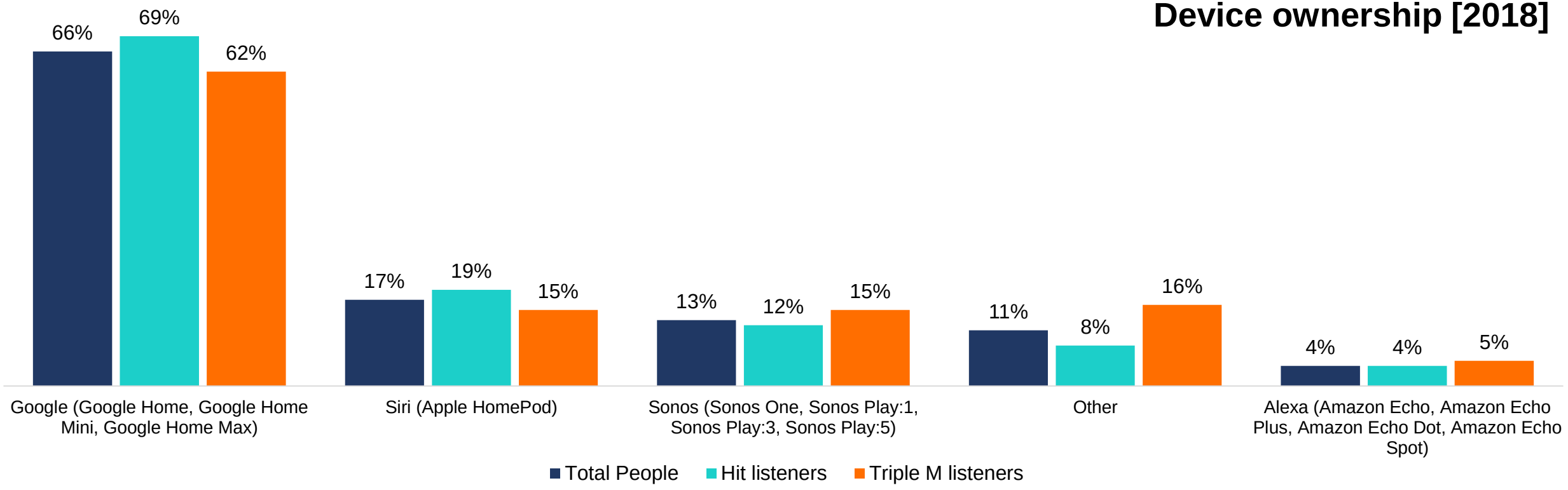


Source: 1. SBS News. 2018. At home, DVAs are outsmarting smartphones | 2. Telsyte. 2018. Australian IoT@Home Market Study.

12% of SCA listeners own a Smart Speaker device.

AUSTRALIA

Device ownership [2018]



*Please note these results are based on **People 18+ SCA listeners living in Australia**

Source: SCA Research. 2018. Audio Landscapes Study (People 18+ N=7025, Hit listeners 18+ N=3478, Triple M listeners 18+ N=3547. National)

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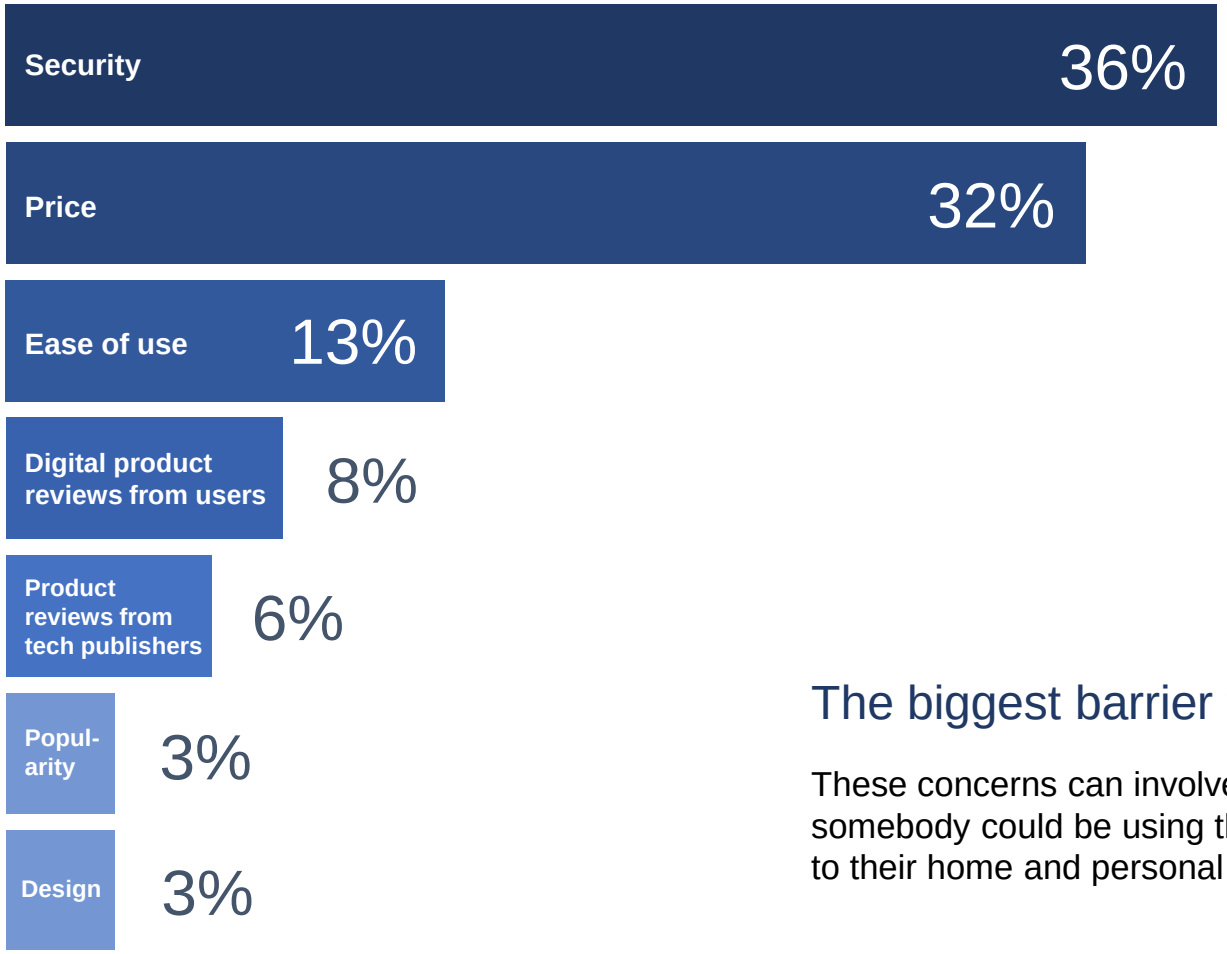
So what are the barriers to purchase of a Smart Speaker?

USA



Women (38%) are more likely to be worried about the security of Smart Speakers than men (33%).

The biggest barrier to purchase of a Smart Speaker in America is security.

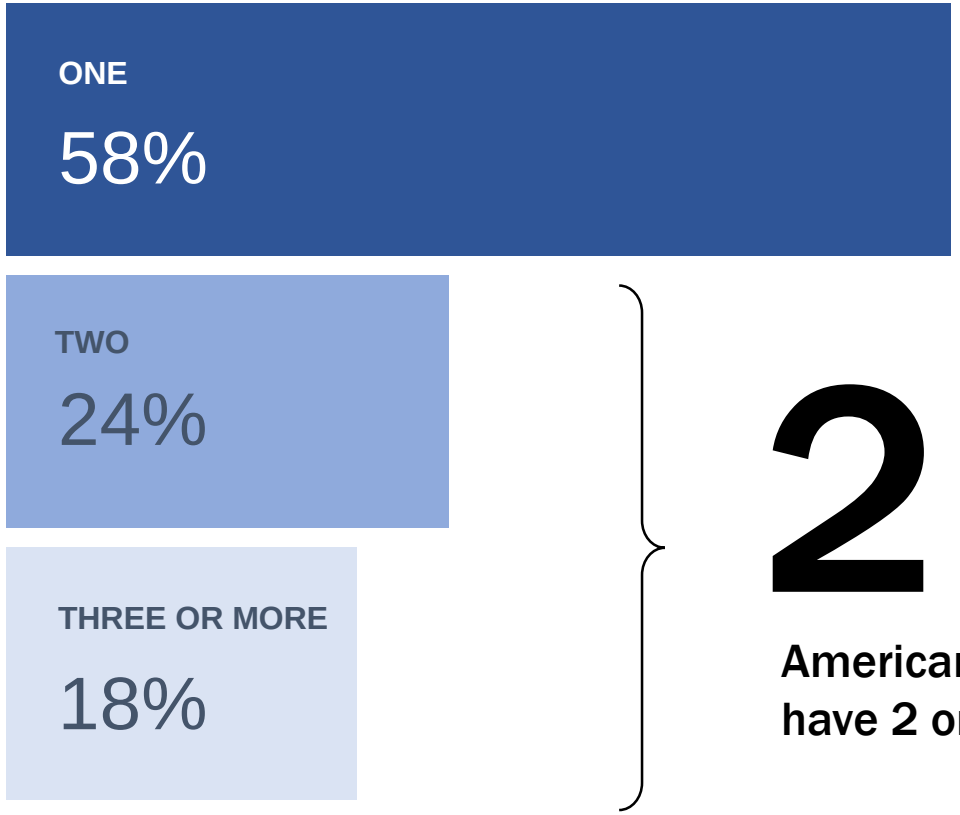
These concerns can involved people being worried that Smart Speakers are always listening, that somebody could be using their device to listen in on their conversations, or that it gives people access to their home and personal information.

Source: McAfee. 2018. New Security Priorities in an Increasingly Connected World (N=1234. United States of America)

Smart Speaker owners are seeing a need for more than one device in their home.

USA

NUMBER OF SMART SPEAKER DEVICES OWNED



While 45% of American Smart Speaker owners are planning to purchase an additional Smart Speaker device

2 in 5

American Smart Speaker owners have 2 or more devices in their home

Source: NPR & Edison Research. 2017. The Smart Audio Report (People 18+ N=1620, Smart Speaker Owners N=800. United States of America)

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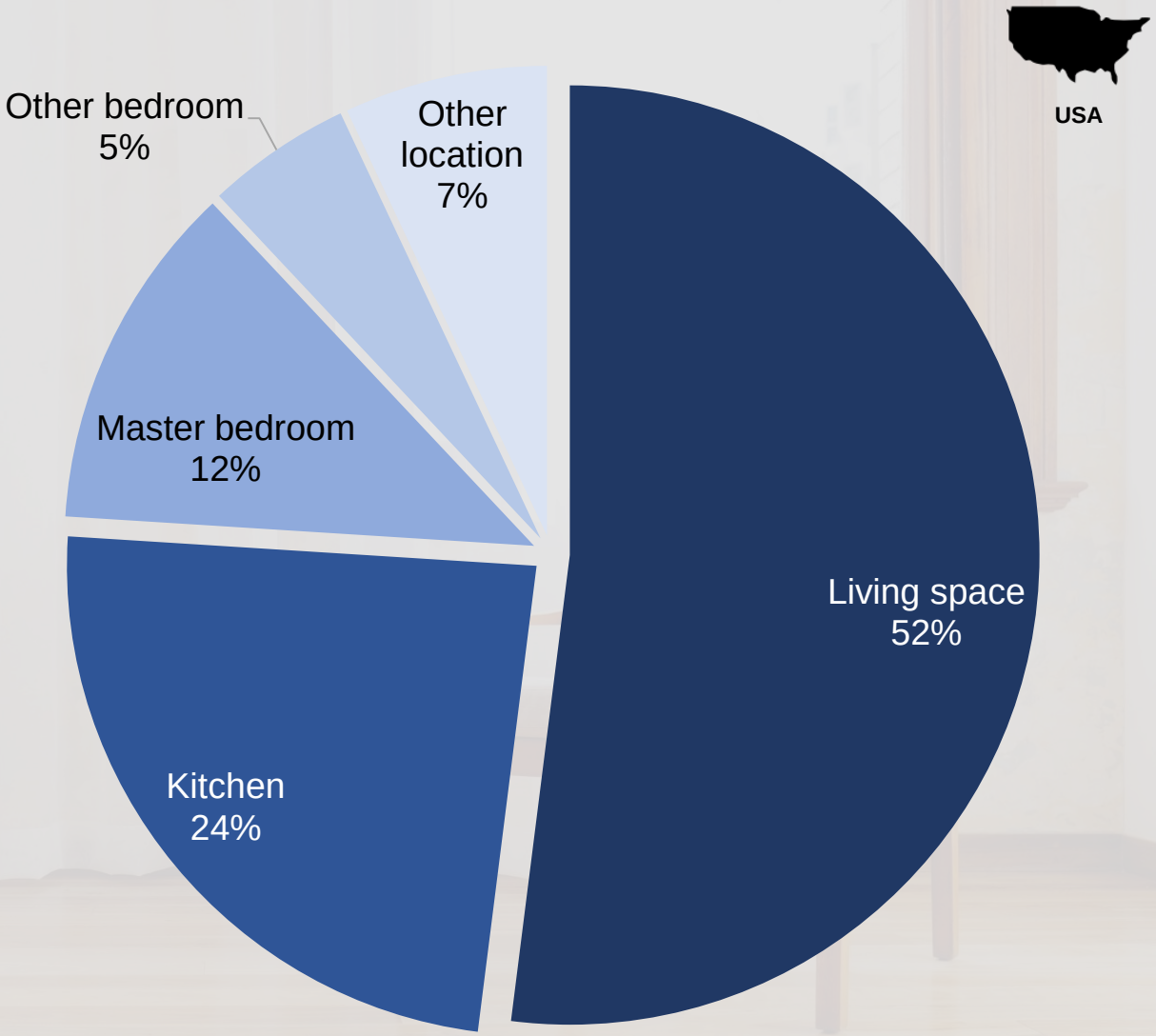
1 in 2

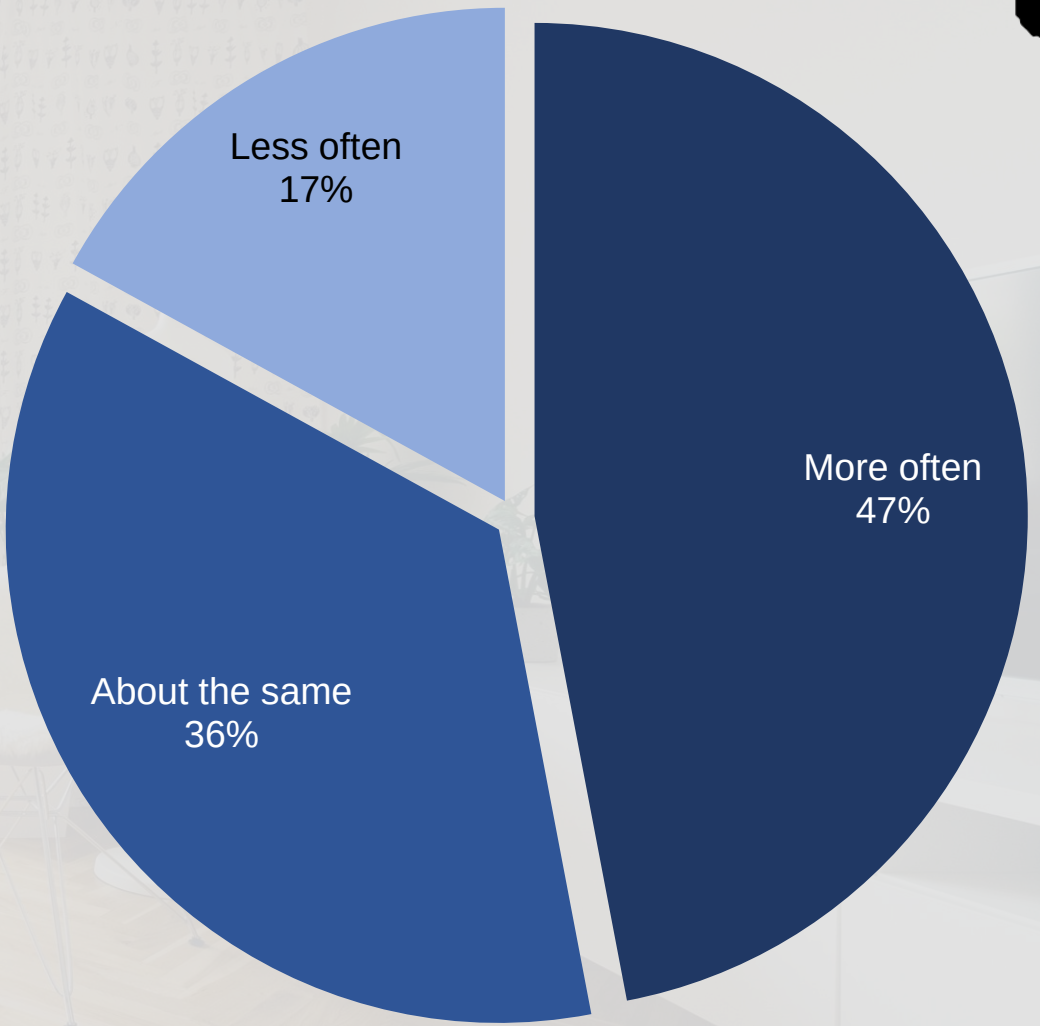
American Smart Speaker owners have their primary Smart Speaker device located in the living space



Source: NPR & Edison Research. 2017. The Smart Audio Report (People 18+ N=1620, Smart Speaker Owners N=800. United States of America)

1 in 2

Americans use their Smart Speaker more often now compared to the first month they owned it



USA

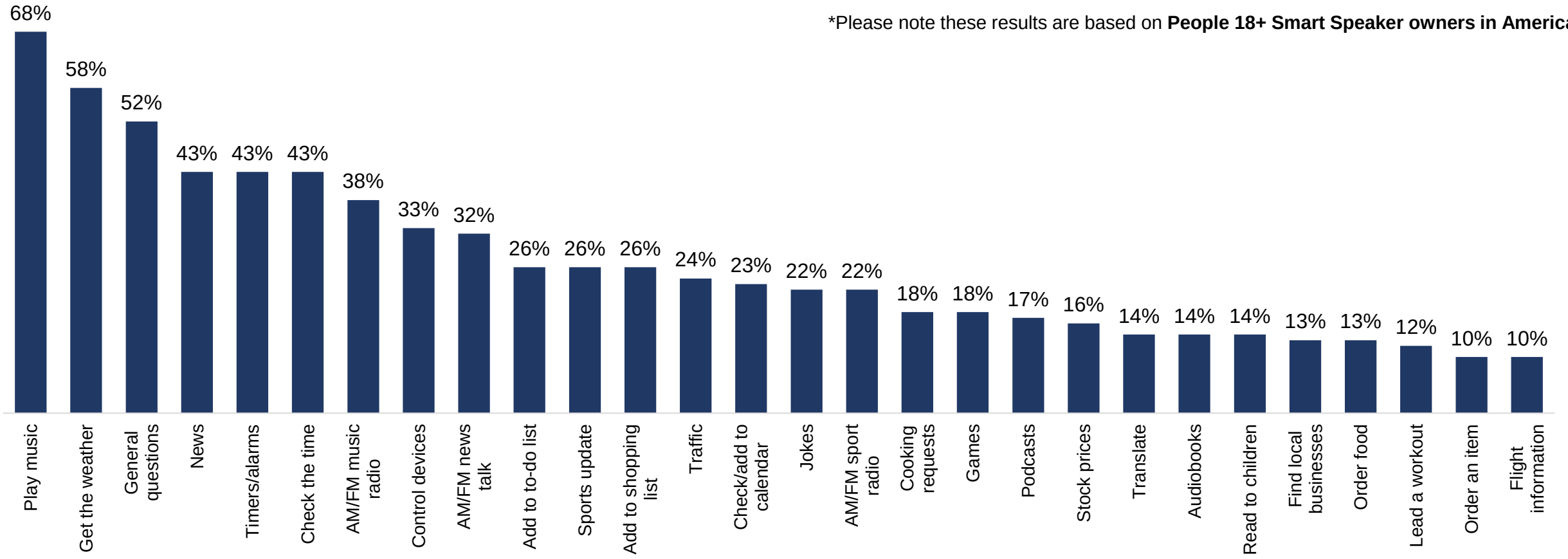
Source: NPR & Edison Research. 2017. The Smart Audio Report (People 18+ N=1620, Smart Speaker Owners N=800. United States of America)

What does a Smart Speaker do?

Over 2 in 3 American Smart Speaker owners stream music through their device.

USA

*Please note these results are based on **People 18+ Smart Speaker owners in America**



Source: NPR & Edison Research. 2017. The Smart Audio Report (People 18+ N=1620, Smart Speaker Owners N=800. United States of America)

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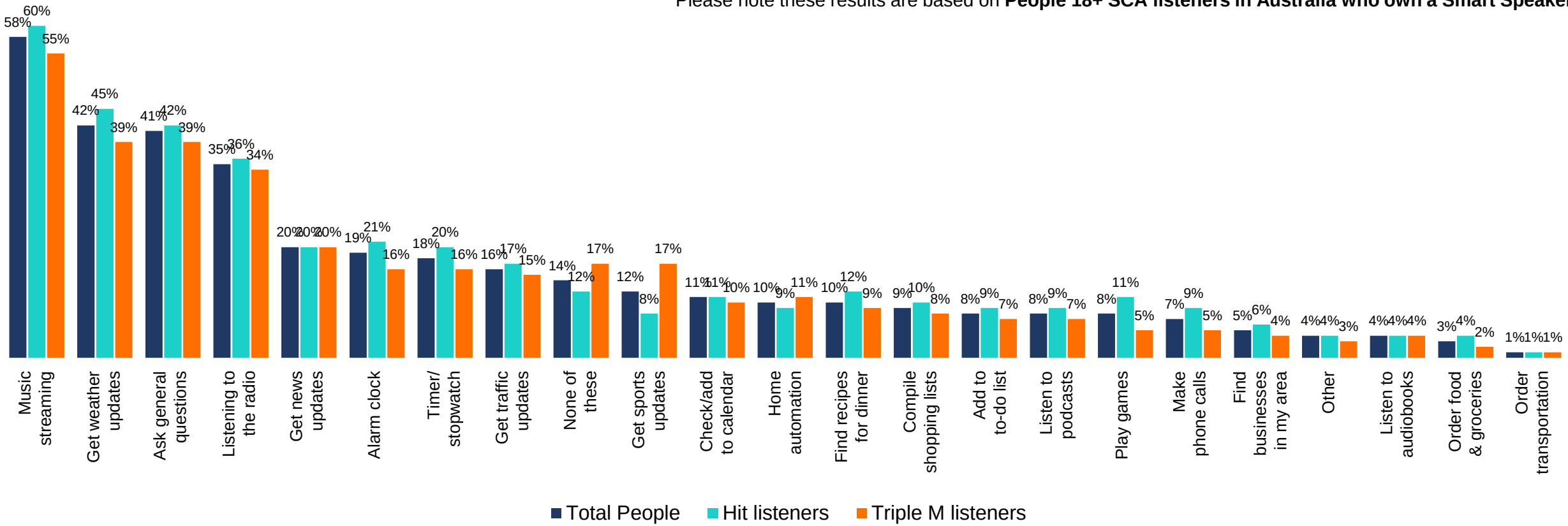
Over 1 in 2 SCA listeners who own a Smart Speaker stream music through their device.

AUSTRALIA

*Please note these results are based on **People 18+ SCA listeners in Australia who own a Smart Speaker**



Source: SCA Research. 2018. Audio Landscapes Study (People 18+ Smart Speaker owners N=835, Hit listeners 18+ N=443, Triple M listeners 18+ N=392. National)

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The top uses for Smart Speakers have communal appeal

- Listening to music
- Checking the weather
- Asking fun questions and research

53% of Smart Speaker owners use their device with others in the household, while 2 in 3 use their device to entertain friends and family.

Only 16% of people are still uncomfortable using voice commands in front of others.

USA

Their booming popularity means people are listening to more audio…

70% of Americans are listening to more audio since they purchased their Smart Speaker.

These devices allow for effortless listening – no fussing with a smartphone app.

28% of Americans are now listening to more news/talk since getting their Smart Speaker.

This makes sense considering the developments of “news briefs” which give listeners direct connection to the top news outlets – allowing for a quick rundown of the day’s events.

1 in 3 Americans have replaced time spent with smartphones with Smart Speakers

2 in 3 Americans use their smartphone for fewer activities since they got their Smart Speaker.

Among these, they are using entertainment services less, do less online purchasing, and do fewer general searches on their smartphone device.

Source: 1. Marketingcharts.com. 2018 . 4 Studies, 4 Key Findings about Smart Speakers | 2. NPR & Edison Research. 2017. The Smart Audio Report (People 18+ N=1620, Smart Speaker Owners N=800. United States of America)

What does this mean for SCA?

It all starts with the ear…

"In many ways the ear is superior to the eye" – Dr Elizabeth Loftus

There is evidence from controlled laboratory studies that shows that when you present a list of words to people - either auditory (for example, on a tape recorder) - or you present it visually (for example, on slides) - people remember more words if they hear the words rather than see them.

But why is that?

Iconic memory

Stores visual images

Echoic memory

Stores auditory images

When the eye sees a picture or takes in visual information, a fairly complete image registers itself in iconic memory. This fades away in approximately **a second or so**.

When the ear takes in information, it too registers a fairly complete image, but it fades away more slowly – in approximately **four to five seconds**.

Source: 1. Jack Trout & Al Ries. Positioning: The Battle for your Mind. 1980. | 2. Wayne Ens. The Eye Versus The Ear. 2016

There are two kinds of words

Repeated tests have shown that the mind is able to understand a **spoken word** in 140 milliseconds, and a **printed word** in 180 milliseconds.

Psychologists speculate that to account for this delay, the brain translates **visual** information into **aural** sounds that the mind can comprehend.

Not only do you hear faster than you see, your hearing lasts longer than your memory of visual images. Those images fade in **one second** unless your mind does something to file away the essence of the idea.

Hearing on the other hand lasts

5x as long

Source: Jack Trout & Al Ries. Positioning: The Battle for your Mind. 1980.

Listening to a message is much more effective than reading it for two reasons…

#1

The mind holds the spoken words in storage much **LONGER**, enabling you to follow the train of thought with greater clarity.

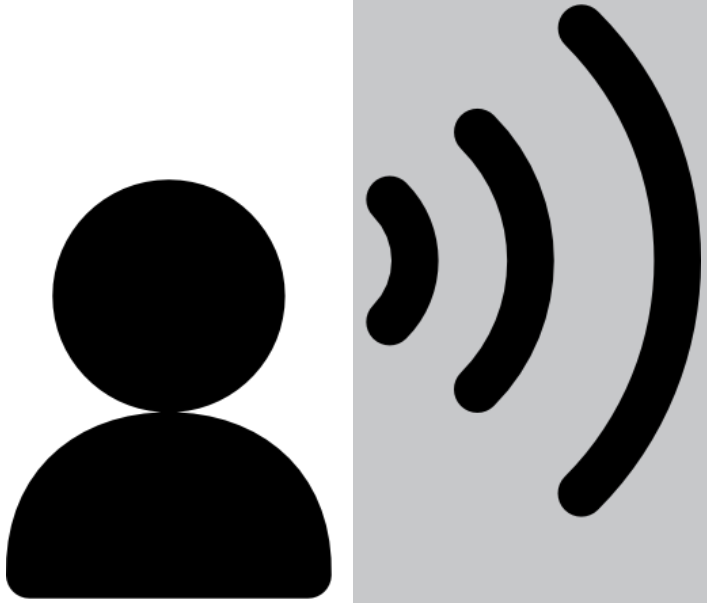
#2

The **TONE** of the human voice gives the words emotional impact that printed words cannot achieve.

So why is the spoken word more memorable?

Written language is recorded by the mind into an internal form of oral language.

The mind effectively translates printed words into their spoken equivalents before it can understand them.



So this explains why…

- Children learning to read will move their lips when reading
- A deaf person has more trouble learning to read, as there are no sounds to translate the words into. While it's much easier for a blind person to learn Braille (on average, a blind person can read Braille almost as fast as an average sighted person).

And why there's a 40 millisecond difference between the printed and spoken word …

On average it takes 140 milliseconds for **spoken words** to go directly into the mind.

Printed words however, make a mental detour through the aural portion of the brain. So the trip takes around 180 milliseconds.

Source: Jack Trout & Al Ries. Positioning: The Battle for your Mind. 1980.

So how does this affect advertisers?

Verbal should be the driver in a sales message, while the pictures should reinforce the words – *never let pictures or movement overwhelm the sound*.

When this happens, viewers stop listening and little communication takes place.

Consumers spend

85%

of their time with ear-orientated media (radio)

Consumers spend

15%

of their time with eye-orientated media (newspapers)

Audio is the theatre of the mind, allowing consumers to create a picture which relates back to their experiences.

Blooms Pharmacy

Duracell Batteries

Source: 1. Jack Trout & Al Ries. Positioning: The Battle for your Mind. 1980. | 2. Rod Schwartz. Advertising and the two gateways to the brain. 2017

Branding as we know it is changing…

Logos, fonts, corporate colours and other visual assets are totally unrecognisable to the naked ear, which means in today's visually cluttered world, they're practically invisible.

People simply can't consume any more visual stimuli so…

the need for an

Audio Logo

has never been more important

Netflix cleverly plays their 'babaaam' logo before every title on their platform, making it one of the most well known audio logos in the world with sonic chops to cut through on any medium that uses sound. As soon as you hear that short little blast you're instantly transported to your couch.

https://youtu.be/yYzaEnt0kxs

When McDonalds launched a campaign in 2003 with Justin Timberlake's *"I'm Lovin' it"* it was the first time they had released the same set of ads worldwide. They would never have imagined that the "ba da ba ba ba" vocal hook would become as globally recognisable as the golden arches themselves.

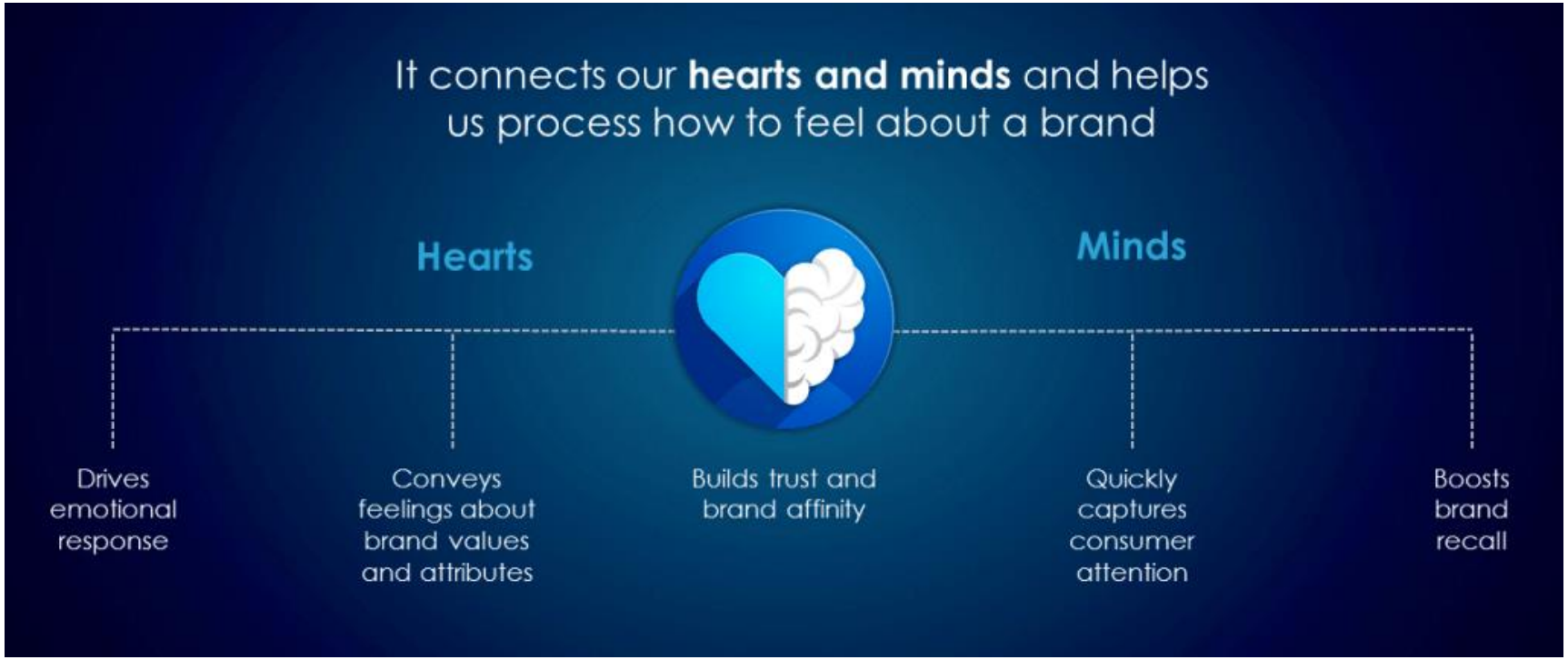
https://youtu.be/Wqv_vCEUQig

The adrenalin and excitement of driving an Audi is captured perfectly in the well-known Audi heartbeat logo.

https://youtu.be/Ua8F7Q_qwBw

Source: Eardrum. 2018. The Year of the Audio Logo.

The business of an Audio Logo…



Sound helps form how we **feel** about a brand through a combination of our emotional and analytical sides. An Audio Logo/Sonic branding involves the creation of an audio language for a brand based on its essence, values, promise, and personality – a language which gets expressed across all touchpoints, including web, apps, TV ads, trade shows, retail environments, and the product itself.

Not only does an Audio Logo make brands memorable with strong recall, trust and affinity to a brand can also be developed through the emotional response sound drives.

Source: 1. Kevin Perlmutter & Nora Bradshaw. Man Made Music – Addressing today's top brand challenges with sonic identity. 2. Lauren Vetrano. 2018. Sonic branding: bring your brand front of mind when consumers are shopping. | 3. Laurence Minsky & Colleen Fahey. 2014. What does your brand sound like?

Sonic branding is critical to creative…creative is critical to driving sales.

Sonic branding is all about resonating emotionally, being understood quickly, and generating sales. Sound can build a brand through feelings, instincts, and memories.

Audio logos that haven't been in market for a long time benefit from repetition as the longevity leads to imprinting on the brain.

> *"The fourth screen is audio. We're seeing that start to evolve as a key strategic thought process for brands and agencies"*
>
> *John Trimble, CRO at Pandora*

Having a **Sonic Identity**, or in other words, using sound to communicate a brand message, is more important than ever, as audio makes its way into more of life's moments. This includes everything that creates the "sound" of a brand – from the audio logo, to a musical jingle, and even the voice profile of the actor.

All of these elements working together creates a powerful, auditory representation of the brand.

Source: 1. Lauren Vetrano. 2018. Sonic branding: bring your brand front of mind when consumers are shopping. 2. Nielsen Catalina Solutions, nearly 500 CPG campaigns that ran in 2016 and 2017 on all major media platforms. 3. Veritonic. 2017. 2017 Audio Logo Index – The ultimate report on sonic branding effectiveness. | 4. Pandora for Brands. 2017. The 10 Best Quotes About Audio Music and Experiences From Advertising Week 2017.. | 5. Pandora for brands. 2017. Voice is the new touch. | 6. Spotify for Brands. 2017. The Power of Audio: Chapter 2.

So here’s why…

Sound & music evoke **emotion**…

It sparks emotion, motivates, and conveys meaning – music can change your mood in an instant.

A study out of Leicester University has shown that brands with music that fit their identity are 96% more likely to be recalled than those with non-fit music or no music at all. It also showed that respondents were 24% more likely to buy a product with music that they recall, like, and understand.

Sound & music are **efficient**…

It bypasses the rational part of the brain and reaches us at an instinctual level – making us react even when we are not fully paying attention.

As reaction time to sound is much faster than any other sense, it can be the fastest, and often, least-expensive way to instantaneously heighten engagement. Sound can also travel where visuals can’t go.

Sound & music are **experiential**…

It sets the tone, provides context, provides cues on what to feel, and helps navigate.

The world has moved from a *communication-focused* world to an *experience-focused* world, and in experiences, tempo and instruments are more powerful than fonts and colours. The right music can forge greater connection at live events or spaces, and can effectively convey a brand’s story and its values.

“People will skip ads, but they won’t skip experiences.”

Melissa Barnes, Head of Global Brands at Twitter

Source: 1. Kevin Perlmutter. 2015. 5 ways the power of sound tackles top brand challenges. | 2. Kevin Perlmutter. 2015. Facing the music as a brand strategist.

5 opportunities where Sonic Branding can be used to address brand challenges…

1.

Conveying purpose & values

Music can be the anthem and emotional engine to convey a brand's purpose and values, the types of products they sell, or the genre of entertainment they showcase. Music has the ability to set the tone, the pace, and the energy behind what the brand stands for.

2.

Communicating across cultures

Music has the ability to unite demographics under a shared psychographic. By using the right mix of genres, instruments, or enlisting the influence of artists, brands can authentically connect with multiple groups of people simultaneously.

3.

Connecting different touch points

Music has the ability to convey meaning and personality across both physical and digital environments. It can help a brand become visible when there's no ability to convey a message visually.

4.

Enhancing sponsorships & spaces

Appropriately incorporating a brand's proprietary music and sounds with a stadium sponsorship, retail space, or other immersive environments, will increase attribution and heighten emotional engagement, as well as improve ROI.

5.

Humanising digital interactions

The use of music and sound can significantly improve digital interactions by incorporating a brand's unique identity and personality to provide clear navigation with proprietary sounds that are both functional and emotional.

Source: Kevin Perlmutter. 2015. 5 ways the power of sound tackles top brand challenges.

What does this mean for our clients?

It’s in our DNA…

Since the dawn of civilisation, **speaking** has been human-kind’s most natural form of communication and the foundation of how we learn.

Another long held trait of humans is to attach objects with **human characteristics**, making us come to trust and identify with them. When devices talk to us, no matter how robotic they sound, they immediately take on their own personality.

“Recent advances in processing speed and algorithms enable devices to respond dynamically, incorporating context from diverse data sets, customer preferences, and real-time contextual signals.”

This has unlocked a new form of personalisation, where our devices become trusted partners, media managers, concierges, and even…friends?

Source: 1. Jessica Groopman. 2017. The Internet of Talking Things: Why Voice Interactions Catalyze Consumer IoT Adoption. | 2. Arpapat Boonrod and Prachawan Ketavan. 2018. The Future is Voice: How Voice Technology is Changing the World of People and Brands.

Humans have developed four emotional spaces that Smart Speakers provide them with.

USA

1.

Provide trust & reliance

Consumers tend to develop child-to-parent relationships with their Smart Speaker due to their dependence on the device to guide, answer, and provide accurate data or actions.

2.

Provide the ability to control

Having a Smart Speaker makes people feel good about themselves as they are always the boss and are in control of the relationship between themselves and the device (adult-to-child relationship).

3.

Provide fun

Humans can develop a child-to-child relationship with their Smart Speaker prompted by curiosity or boredom in the moment. People enjoy asking the device random questions which can make them laugh, while also being more open to sharing secrets with the device.

4.

Provide emotion & intimacy

Humans are always craving intimacy, and Smart Speakers have the ability to forge more personal connections (adult-to-adult), with around 1 in 4 people telling their machine they love them.

Source: Arpapat Boonrod and Prachawan Ketavan. 2018. The Future is Voice: How Voice Technology is Changing the World of People and Brands.

Technology is changing, and so should sales tactics…

From clicking, typing, tapping	→	To **speaking**, **gesture**, **screenless interactions**
From salesy ‘push’ tactics and templates	→	To **multi-model data** and **contextual content** that ‘pulls’ customers, engaging as a human would
From broadcast to rigid segments	→	To **dynamic targeting** based on individual
From corporate voice	→	To **humanised digital voice**, where any channel converses naturally, as a helpful brand ambassador
From irrelevant or disruptive pop-up ads	→	To **emotionally resonant**, **in-stream branded moments** offers or advice
From corporate noise	→	To **redefining brands** as trusted, useful, emotionally resonant and timely partners…always there but not in the way

Source: Jessica Groopman. 2017. What does a more human Internet of Things mean for brands?

50%

of American Smart Speaker owners have used their device to make a purchase in the past year

Commerce offers the biggest growth opportunity for voice technology.

The greatest potential of Smart Speakers is their ability to enable frictionless transactions. Americans under the age of 36 are the most likely to have already made a purchase using their Smart Speaker device (25%).

As brands begin to create deeper connections with their consumers using these devices, their ability to drive easy, repeat purchases through voice will bring major opportunities in the future.

Source: Erin Jordan. 2018. Future of Retail 2018 (N=1600. United States of America).

Voice is the new touch.

- Voice now fuels **1 in 5 Google searches**, and is expected to drive half of Google searches by 2020.
- Almost 3 in 4 Smart Speaker owners report having **made a purchase** directly through their voice assistant, and 39% said that an interaction with a voice assistant had **influenced** a purchase in the prior month.
- These devices allow brands to create a **deeper**, more **engaged** relationship with their consumers. Most Americans are willing to hear ads on their voice assistant if…
    - It asked whether they want to hear the ad before it plays (30%)
    - They get to choose the brands they hear ads from (28%)
    - Ads are connected to brands they “like” on social networks (23%)
    - Ads are personalised based on commands or questions they ask often (25%)
    - Ads are embedded into answers from the assistant (18%)

USA

Travel

In the travel space, people are primarily using their Smart Speakers to **inquire about hotels** (58%). Others are using their device to **check their flight status** or to **purchase or book something.**

37% of Smart Speaker owners who have booked a trip since buying their device **used it during the process**. That figure rises to 44% among Millennials

Banking

More than 1 in 3 Smart Speaker owners have used their device for banking.

The most common uses are to **check a balance** (70%) and to **pay a bill** (59%), while some claim to have **purchased or traded stocks** (36%) using their device.

Healthcare

46% of Smart Speaker owners are using their device for healthcare related matters.

The most popular use is to ask about **symptoms** (70%). Other common healthcare-related activities include asking about **health or diet tips** and **connecting to a hospital or doctor**.

Source: 1. Marketingcharts.com. 2017. As Smart Speaker Usage Grows Voice Increasingly Replaces Swiping and Typing | 2. Invoca. 2017. The Rise of Voice

However, brand loyalty may be under threat due to Smart Speakers

It's never been more important for brands to develop an audio relationship. According to research from comScore, Smart Speakers appear to be changing the way consumers select products – emphasising "items" over "brands".

This may also be negatively effecting brand loyalty. When a consumer goes to a grocery store, they go to the product's aisle and select the brand they are familiar with, but when people order through their Smart Speaker, nearly half the time they're not actually saying the brand name.

With the majority of these devices not having a screen, consumers are unable to see product details, and there's risk of incorrect orders or voice commands being misheard.

58%

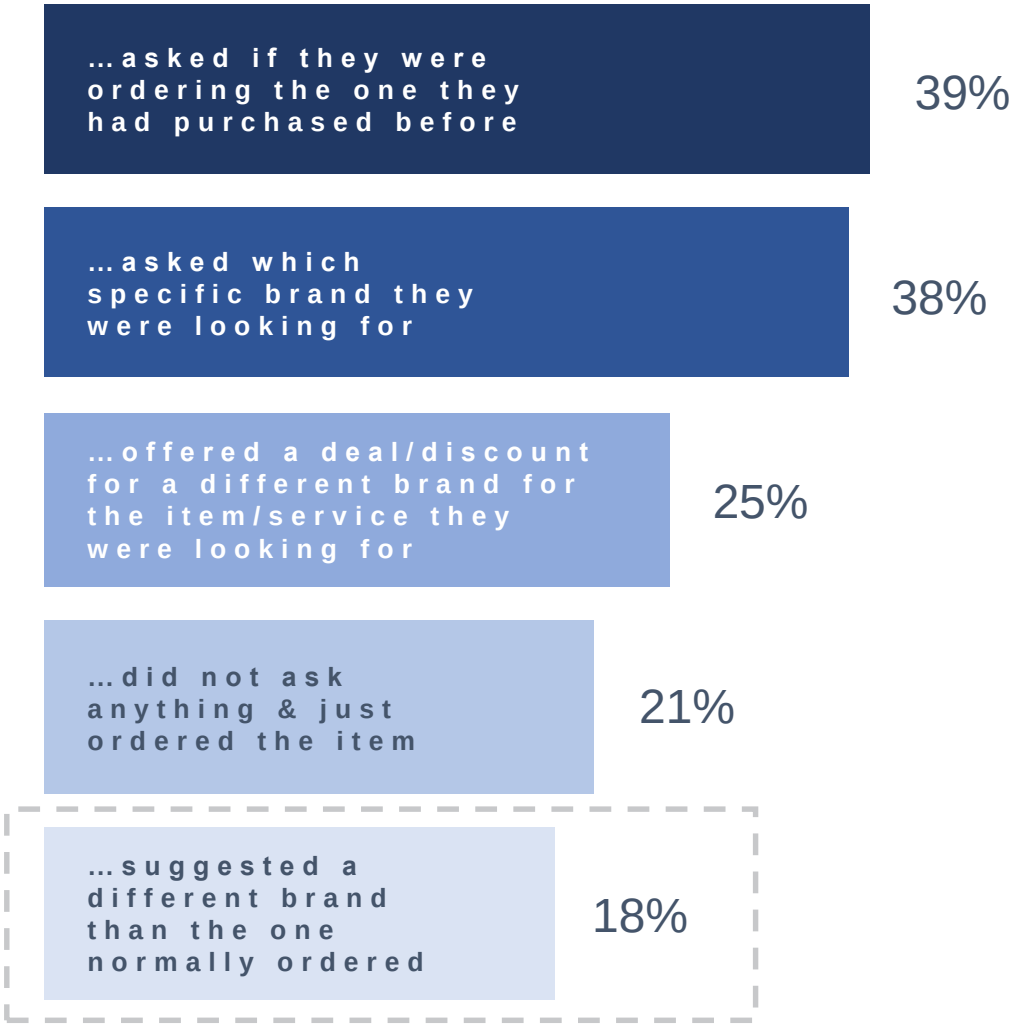
said "When ordering, I asked my Smart Speaker to purchase the **brand**" (eg. Colgate)

42%

said "When ordering, I asked my Smart Speaker to purchase the **item**" (eg. toothpaste)

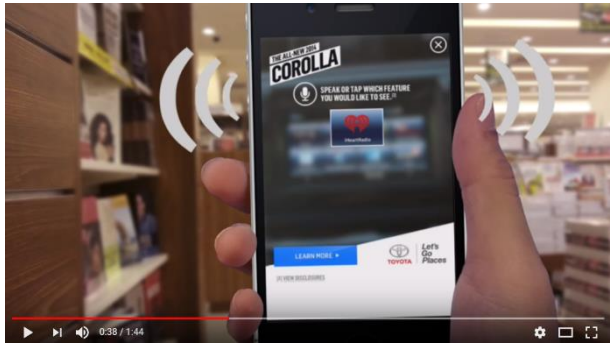
When ordering an item via a Smart Speaker, it…

USA



Source: Joe Mandese. 2018. comScore: Smart Speakers represent new threat to brand loyalty.

So how are brands currently using this new Smart Speaker technology?



Toyota Corolla

The campaign allows consumers to engage in a two-way conversation with the ad unit to mimic the experience of Entune Audio (Toyota's in-vehicle multimedia and telematics system with speech recognition) feature available in this model.

Average time spent with this ad is 1 to 2 minutes.

https://www.youtube.com/watch?v=df8HKPYYFHY

Patron Tequila

The brand partnered with Amazon's Alexa to bring its 'Cocktail Lab' recipe library to consumers via voice activation.

https://www.youtube.com/watch?v=yXUEzD9Cqi8

Source: 1. Lucy Lacy. 2014. Toyota speaks to consumers with voice activated mobile ads. 2. Christopher Heine. 2017. Here's what you need to know about voice AI, the next frontier of brand marketing. 3. Azadeh Williams. 2017. 8 brands using voice activation to boost brand engagement.

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