VOICE ASSISTANT SEO REPORT FOR BRANDS

JULY 2019

voicebot.ai™
GIVING VOICE TO A REVOLUTION

Magic + Co.

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About Voicebot

Voicebot produces the leading independent research, online publication, newsletter and podcast focused on the voice and AI industries. Thousands of entrepreneurs, developers, investors, analysts and other industry leaders look to Voicebot each week for the latest news, data, analysis and insights defining the trajectory of the next great computing platform. At Voicebot, we give voice to a revolution.

Methodology

Consumer survey data was collected online during the first week of January 2019 and included 1,038 U.S. adults age 18 or older that were representative of U.S. Census demographic averages. Findings were compared to earlier survey data collected in the first week of September 2018 that included responses from 1,040 U.S. adults. Voice search data results from Amazon Echo Smart Speakers with Alexa, Apple HomePod with Siri, Google Home and a Smartphone with Google Assistant, and Samsung Galaxy S10 with Bixby, were collected in Q2 2019.

About Magic + Co

Magic + Co. is a next-gen creative services firm whose core expertise is in designing, producing, and executing on conversational strategy, the technology behind it, and associated marketing campaigns.

Facts

- 25 people, technologists, strategists, and creatives with focus on conversational design and technologies.
- 1 Webby Award Nominee and 3 Honorees.
- 3 years old and global leader.
- We've worked primarily with CPG, but our practice extends into utilities, governments, banking, entertainment, healthcare and is international in scope.

Magic + Co.

Consumer Trends and Research Results from the Next Discovery Battleground

ComScore never said that 50% of all search would be by voice in 2020 even though the internet likes to attribute that quote to the research firm. However, a quarter of a trillion annual voice searches is a number that should command your attention.

Rebecca Sentance of eConsultancy did a nice analysis of the origin of the ComScore 50% of search by voice myth. She noted that it can be attributed to Andrew Ng when he led Baidu in China and that his prediction also included visual search. Her estimates are that voice search was closer to 13% of Google's total search volume and 20% of mobile search volume in 2018 as Google has previously stated. SEO Tribunal says total Google searches in 2018 were 2 trillion, so combining these figures suggests over a quarter of a trillion voice searches were conducted last year.

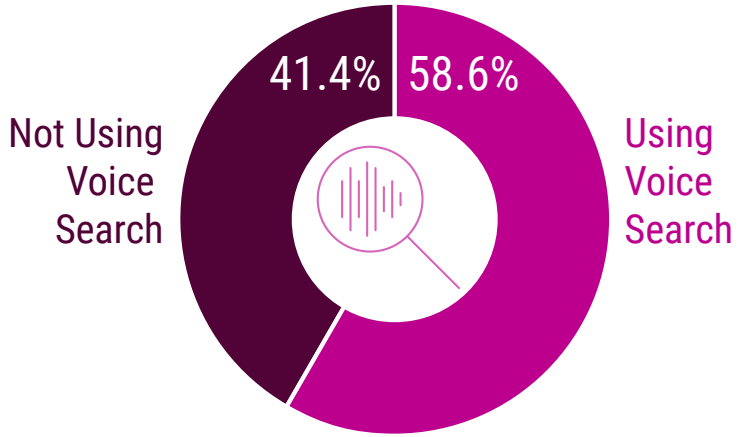
Even if the 50% threshold won't be reached by next year, over 250 billion voice searches in one year is not a small figure. Voicebot consumer survey data suggests that a lot of people are using voice search today and it will continue to rise.

A January 2019 survey by Voicebot found that nearly 60% of U.S. adults say they have used voice search and 47% expect to increase usage this year. Smartphones are the dominant voice search devices today, but smart speakers are a big contributor and are sure to increase these figures even more as we approach one-third of U.S. adults with access to them. The scale and frequency of voice search suggests it will be an increasingly important (and urgent) trend for marketers to address. That fact along with a common misunderstanding that overlooks the realignment of search to voice assistants made this report necessary.

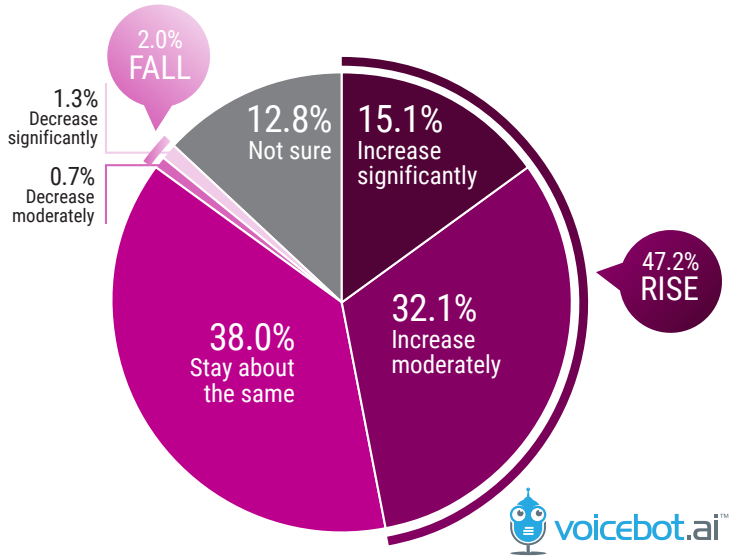
Voice SEO vs Voice Assistant SEO

Because search in general is so concentrated in Google (and a few other players that mostly attempt to mimic Google's algorithms), there is a dominant belief that optimizing for voice search is very similar to, or identical to, optimizing for text-based search. There is good reason to believe this assumption as our research confirms both Google Assistant and Apple's Siri rely heavily on the Google Knowledge Graph to answer most queries. Similarly, Amazon Alexa taps into Microsoft's Bing Knowledge Graph which is a close approximation of Google search results. However, change is afoot in search engine optimization. Voice Assistant search results are often different from text search.

U.S. Consumers Using Voice Search Jan 2019



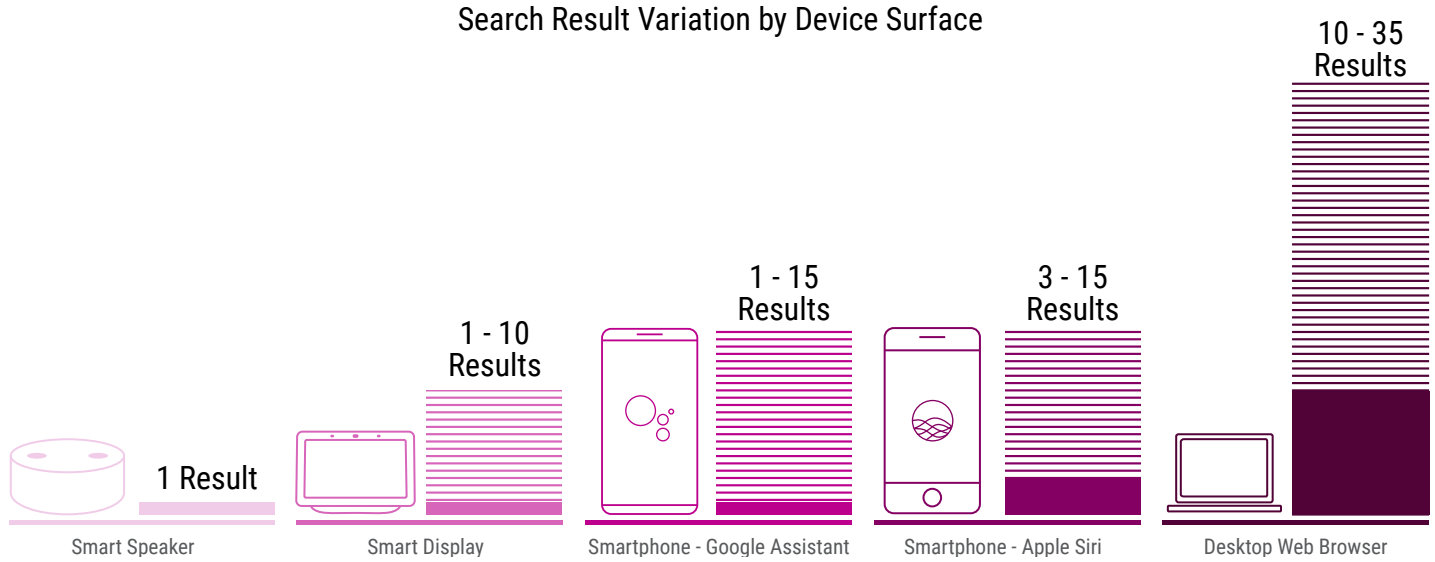
Expected Change in Voice Search Use Frequency



One change that is often overlooked is the rising fragmentation of search behavior. eMarketer reported in late 2018 that 46.7% of product searches in the U.S. started with Amazon compared with just 34.6% for Google. YouTube (owned by Google but a different search engine) is the top search engine for video and number two worldwide for all searches according to Search Engine Journal. Facebook said in 2017 that users were conducting two billion searches per day globally. Baidu and Yandex dominate searches in Chinese and Russian respectively. Search is less monolithic than it may appear on the surface when you see figures like Statista's reporting that Google controls 88.5% of all search worldwide. It depends on how your are defining "search."

Voice assistants are riding the wave of changing consumer habits around search. Google's browser search competitors typically replicate its well-honed model of showing 10 or more search results, often with sponsored links that are also relevant to the search intent. For some queries we have seen as many as 35 different results on the first search engine results page (SERP). This approach works well for the desktop web and the more limited list results are reasonably well suited to mobile. It does not work well when search is initiated through voice assistants.

Many people recognize that in a voice-only search interaction, a single audible result is the only decent user experience.



Source: Voicebot Voice Assistant SEO Report

And, that is what the voice assistants have largely settled upon. Sometimes you can get options for additional information beyond the first results using Siri on HomePod, or Alexa through a smart speaker. This only happens when the assistants are sourcing local information from Yelp and have a list to access. Siri on smartphones typically offers 3-15 web search results when it doesn't default to a single audible answer. Google Assistant on a smartphone or smart display will most often give you 3-10 results as well as "chips" to refine your search or access a relevant Google Action voice app.

So, when we talk about voice search, it is important to recognize that the search experience and results will often differ based on the interface. The voice interface inside of the search box on the web, or the Google mobile app, will deliver results differently from a smart display, smartphone, and smart speaker. Voice assistant-based searches are particularly important to evaluate because they use different algorithms. Today, searches conducted through voice assistants frequently wind up tapping into Google's or Bing's knowledge graphs or hit one of the common knowledge databases such as Wikipedia, Yelp, or Yext. Those results often make voice assistant searches look like a facsimile of web search while disguising the fact that something else is going on before an answer is surfaced.

When you ask Alexa about cures for the flu, you will get an answer from Mayo Clinic. Sometimes when you ask Alexa about certain topics you will hear an answer provided by another Alexa user. If you ask about products, you will get information from Amazon.com. When you ask Siri about "the best tablet" you will hear about the iPad. Even Google Assistant will preempt its knowledge graph to offer different results for some queries regarding its products.

Voice assistants consult multiple data sources before checking the knowledge graph. These include proprietary databases for "reserve terms" that the voice assistant providers want to control messaging around. There are also other in-house and third-party information repositories. In addition, voice apps can increasingly answer user questions and are optimized for conversational interactions. All of these sources can be used for answers and be given priority over the web search knowledge graphs.

This is a significant change in search algorithms that few people have yet to recognize. They see the surface differences in terms of voice input and audio output but don't recognize the back-end changes that are taking place. As voice assistant optimized content increases, the traditional web search knowledge

graphs will be consulted less frequently. When you combine this change with the rising use of voice assistants for search, marketers are facing a significant change in how they optimize for search results. This is doubly important because search engine marketing (SEM) which many people know as Google AdWords is severely limited through voice assistants, and in most cases not present at all today.

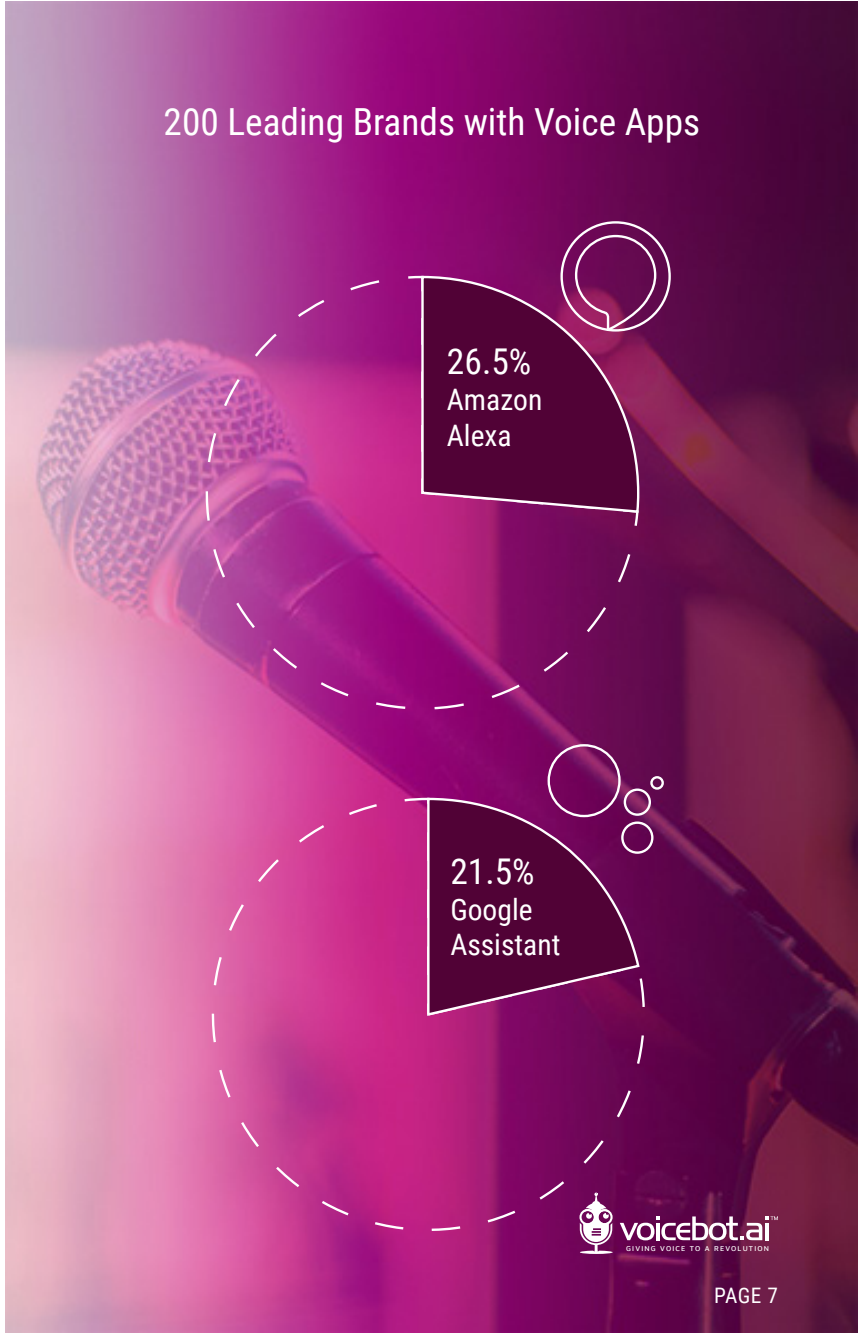
Brands Should Take Notice

The Voicebot research team asked over 4,000 questions to leading voice assistants to assess where we are today with voice assistant SEO and where we are headed. Instead of replicating generic consumer requests, we asked a series of questions about product categories and individual brands to see how the assistants answered. Interestingly, Google Assistant appears to have changed its algorithms around the end of 2018 and is defaulting more often to the knowledge graph and information repositories where it used to refer many queries to third-party Google Actions. Almost everyone else is using some form of knowledge graph or information repository today for most queries, but you can see how this is likely to change in order to better serve consumers.

Overall, the scorecard for brands is not good when it comes to voice assistant SEO. Voice search is rising and third-party sites such as Wikipedia and Yelp are defining the information consumers are hearing about brands. Much of that information is not flattering. Sometimes it leads to competitive brands being mentioned as well.

Only 26.5% of 200 leading brands analyzed have some sort of voice app for Alexa, 21.5% have one for Google Assistant, and about 15% having presence on both platforms. Notably, many of these voice apps are not focused on answering common questions about the brand or product segment in which they focus. This means third-parties are solely responsible for offering information about 3-out-of-4 leading brands during voice assistant interactions. And, for many common searches about brands, the figure exceeds 90% based on our analysis.

Change often means both opportunity and risk are present. Today, voice assistant search seems to be leaning more towards brand risk. The logical question for brands is then, “What should we do?”



What the “Experts” Say

SEO “experts” are offering magical elixirs to answer these questions for brands. The mythical 50% comScore prediction was accompanied by other properly cited predictions such as Gartner’s estimate that 30% of all web browsing will be done without a screen and the rapid rise of smart speaker adoption globally. These data points led SEO experts to train their gaze and recommendations on voice search in countless blog posts and articles in 2017-2018. Voicebot analyzed 38 of the more popular articles on voice search strategy and cataloged 27 different tactics being promoted as recommendations.

Some of these recommendations align well with what we see in voice assistant search results today while others aren’t likely to have any impact. Many of these suggestions may be good voice search hygiene but will not help much as the voice assistants increasingly tap into sources other than the web knowledge graphs. We match the analysis and trends for voice search with the predictions to offer some practical advice for brand marketers to consider today and going forward.

Understanding Voice Assistant SEO and its Trajectory

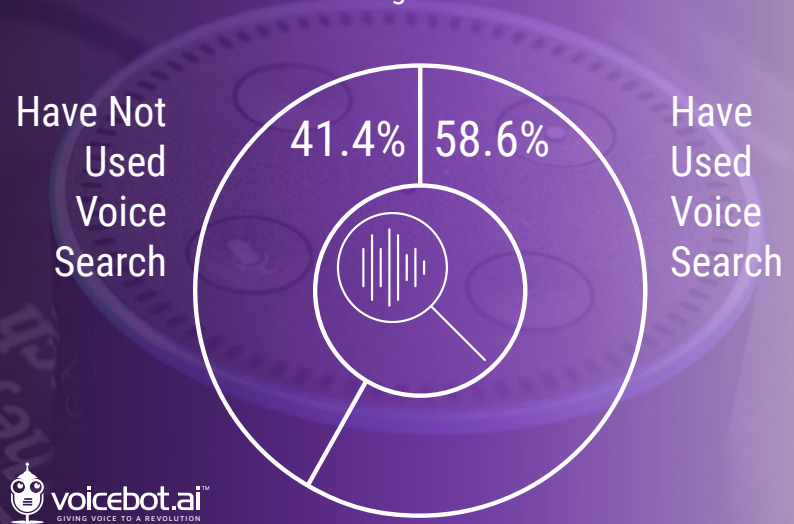
The Voice Assistant SEO Report for Brands 2019 was launched to dispel some of the voice search myths and inject real data back into a heretofore highly subjective debate. We have segmented the report into four sections:

- Consumer Adoption Trends
- Voice Assistant Search Results for Brands and Product Categories
- Grading Recommendations by SEO Experts
- Practical Recommendations for Voice Assistant SEO for Brands

We hope the information provided here helps you better understand where voice assistant SEO stands today while enabling you to better chart a course for success. A thank you is in order for our sole sponsor of this report. Magic and Company helped support this research and make it freely available to you in what we expect will become a valued resource.

CONSUMER ADOPTION TRENDS

U.S. Consumers Using Voice Search Jan 2019



Source: Voicebot Voice Assistant SEO Report

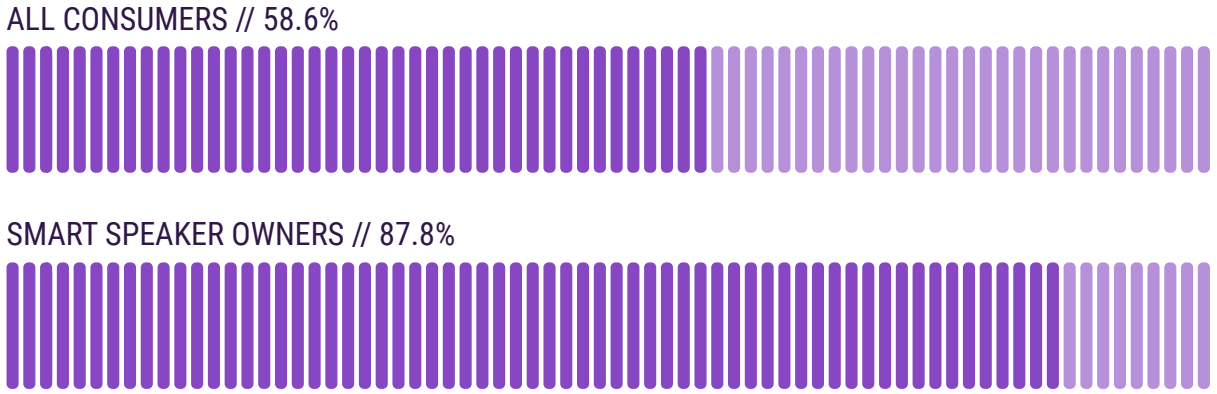
Consumer Adoption of Voice Search 2019

The reason to care about voice search is consumer adoption. There are plenty of technology trends that come along and don't secure consumer traction. Voice search appears to be one of those behavior shifts that the adoption numbers suggest you should pay attention to and start taking action. The top level finding is that 58.6% of online U.S. adults say they have used voice search.

That translates into 148 million U.S. adults that have some voice search experience. Among smart speaker owners, the adoption rate is far higher at 87.8%. This is not surprising given that asking questions was the most tried use case among smart speaker owners in both January 2018 and 2019. Many of those questions are search queries.

U.S. Smart Speaker Owners Using Voice Search

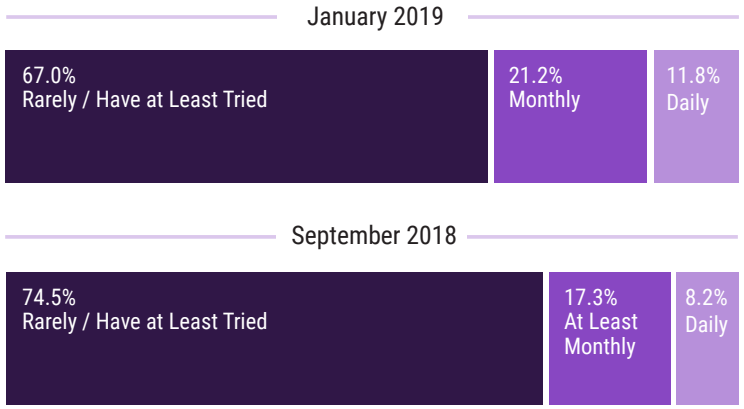
January 2019



Raising Your Voice Search

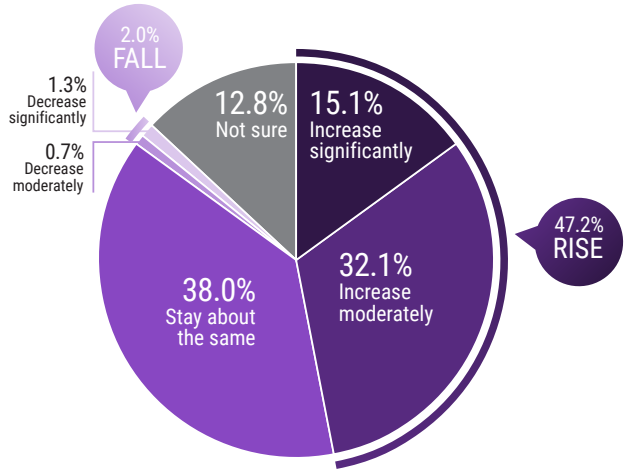
Beyond the baseline of whether consumers have tried voice search, another important finding is that frequency of use rose between late 2018 and early 2019. In September 2018, about one-in-four U.S. adults claimed to use voice search at least monthly. That figure climbed to one-in-three by January 2019.

Voice Search Frequency

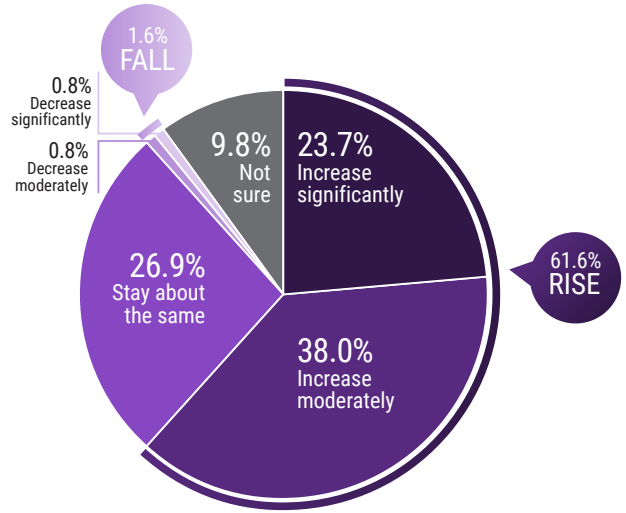


When you consider this figure in the context of 58.6% of consumers saying they have used voice search, it means that 19.3% of all online U.S. adults are monthly active voice search users. Consumers also indicated that frequency of use is likely to rise even further in 2019. Forty-seven percent of users expect to increase their voice search frequency this year. That figure rises to nearly 62% for smart speaker owners.

Expected Change in Voice Search Frequency - Jan 2019



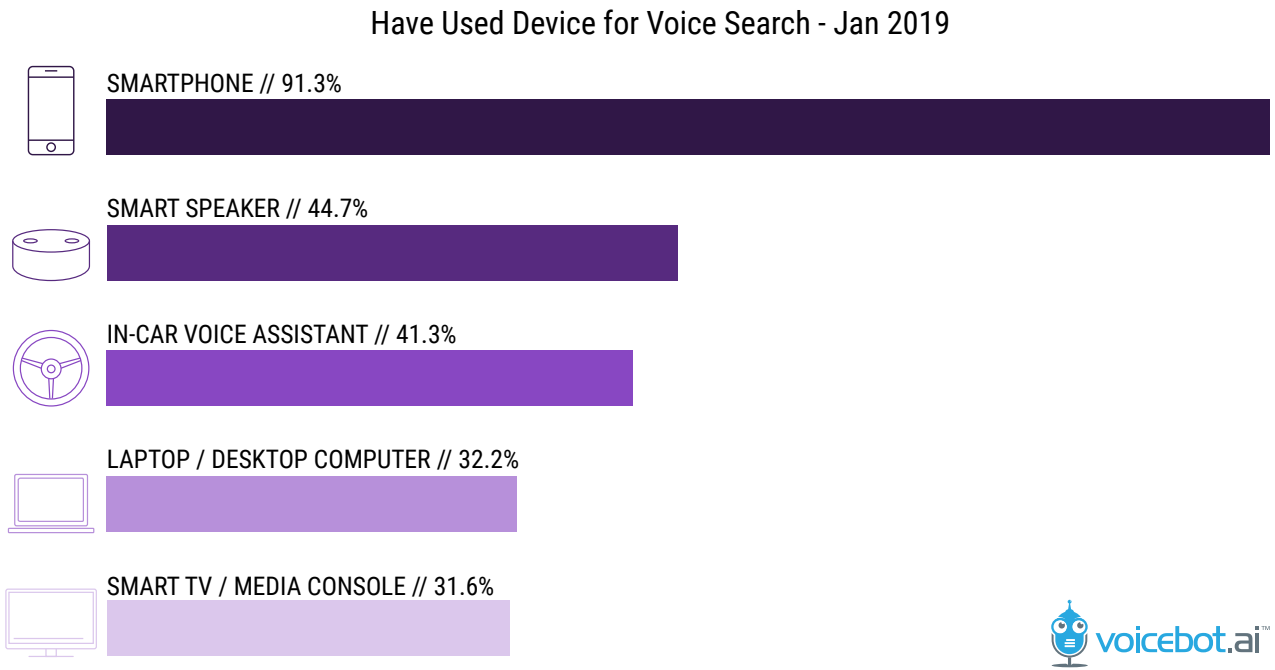
ALL CONSUMERS



SMART SPEAKER OWNERS

Surface Differences

An interesting characteristic of voice search is that results can differ based on the surface or device the consumer is using. We also see in the survey data differences in what devices consumers have used for voice search.

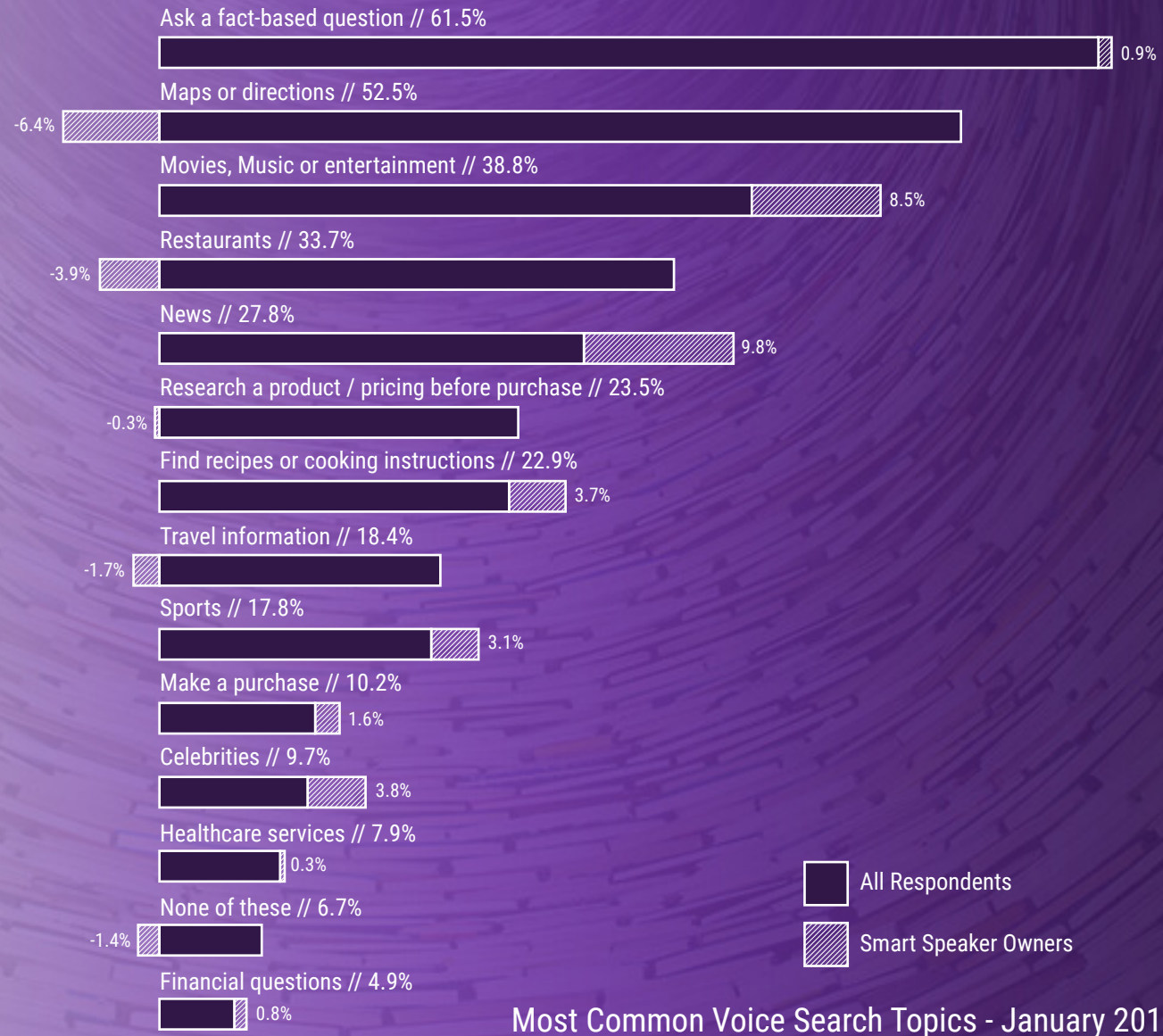


Over 90% of all voice search users have made their request via a smartphone. About half as many have used a smart speaker. That figure lines up closely with smart speaker ownership data during the same period. In-car voice assistants were used for search by 41.3% of consumers with 32.2% on desktops and 31.6% on smart TVs and media consoles. Frequency of use by surface follows a similar pattern with monthly active voice search users on smart speakers and in cars occuring at half the rate of smartphones and laptops and media devices landing at about one-third the rate.

Knowledge Speaks Volumes When it Comes to Facts

The most common type of voice search topic is fact-based questions. This query type is asked by about 3-in-5 voice search users. Maps and directions were not far behind at just under 53%. From there we see some clustering with “Movies, Music, and Entertainment” questions and “Restaurants” falling between 33% - 39%. “News,” “Product Research,” and “Finding Recipes” were selected at a rate of 23% - 28%. Those topics were followed by “Travel Information” and “Sports” both at around 18% with other search categories at 10% or lower.

Aligned with smart speaker use cases biasing toward audio content consumption, voice search on these devices over indexes for search queries related to “News” and “Entertainment,” while under indexing for location-oriented searches such as “Directions” and “Restaurants.” By contrast, asking “fact-based questions” along with queries about “finance,” “healthcare,” and “researching products” via voice search occur at nearly an identical rate across device types.



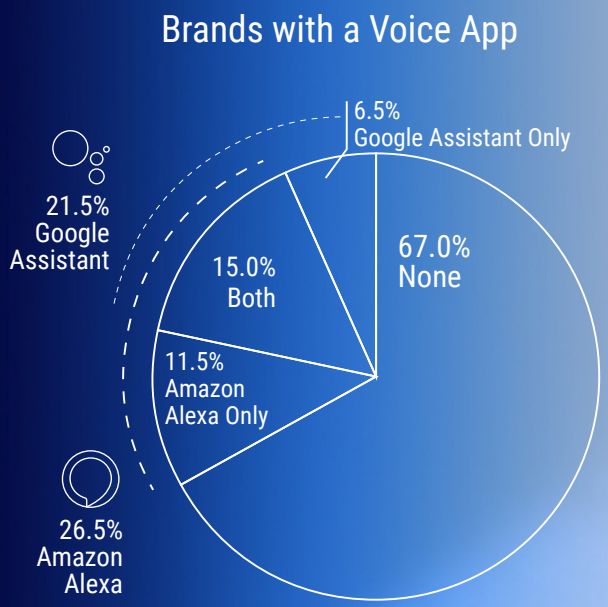
Most Common Voice Search Topics - January 2019

The Behaviors Have It

The data suggest that consumer behavior is indeed shifting as many pundits predicted. Some people have suggested, including AI luminary Andrew Ng, that improvements in speech recognition, specifically higher accuracy when transcribing speech-to-text, will increase voice search adoption. It is not clear that the relationship is causal, but voice search activity has risen alongside improvements in speech recognition.

Maybe more important is the fact that there are now over two billion devices worldwide that provide voice assistant access. Voice assistants may be able to execute transactions and even entertain some people with novel experiences. However, they are also very efficient Q&A machines and many consumers now have ready access to a voice assistant just waiting to be called upon. Voice search use is increasing rapidly and is already at scale. Marketers will recognize the importance of this consumer behavioral shift. The next obvious question is where voice searches obtain their answers when presented to voice assistants.

SEARCH RESULTS ANALYSIS



Where are the Voice Apps?

What happens when you ask over 4,000 questions to voice assistants about brands and products? You hear a lot of Wikipedia entries. If there is a location angle to the question, Yelp is a popular data source. Then there are your standard knowledge graph reponses, mostly from Google and often featured snippets, Google My Business information, or local product inventory feed. If you are asking questions of Apple's smart speaker, you are most likely to hear, "Sorry, I can't get the answer to that on HomePod."

What you are very unlikely to hear is a referral to an Alexa skill, Google Action, iOS app, or voice app of any kind. In all of the questions, only two directed our testing team to a voice app, and both times it was ESPN. These instances also lacked any interactivity which is often expected in conversational interactions. Content from ESPN simply started playing. Amazon Alexa did it for one query and Samsung's Bixby did it for a different query.

The big voice assistant platforms talk about the importance for brands to design rich conversational apps to deliver high quality voice experiences for users. And yet, when they have a chance to tap into these voice apps to answer user questions, they do not. The voice app discovery rate for questions is a mere 0.5%. Users are instead shuffled off to the closest knowledge base that you typically find for web searches or told the feature is not supported. The promise of conversational search and the practice of voice assistants are not matching up today.

It is important to point out that not all of the brands in our study have a voice app for Alexa, Google Assistant or another platform. Of the brands we included in our analysis, 26.5% had an Alexa skill, 21.5% a Google Action, and 15% had both. Two brands each had three Alexa skills and one Google Action.

There were clearly enough brands represented in voice apps that you would think they would be offered as potential answers to some of the questions. It is likely that many of the voice apps would not be able to answer all of the questions, but should be able to answer some of them. It appears that Alexa and Google Assistant may not even be attempting to see if a voice app could answer the query.

Test Scope & Methodology

The questions you can ask voice assistants are limitless so any study must start by deciding what queries will be included. We chose to look specifically at how Amazon Alexa, Apple Siri, Google Assistant, and Samsung Bixby answered questions about well known brands and consumer product categories. We asked Google Assistant on both a smartphone and smart speaker.

Product Category Questions

We started by asking general questions about 21 different product categories. Each product category included 10 questions that are commonly asked in Google searches today. This was a good source to start from because it ensured we were asking real questions posed by consumers and is data that others could also publicly source. The product categories ranged from automotive and insurance to cosmetics and beverages.

Our goal in this set of questions was to learn how many queries could be answered, if the voice assistant's natural language processing (NLP) interpreted the question properly, if it provided a relevant answer, and if any brands were included in the results related to generic questions. Some examples of product category questions included:

"What is the best smart TV?"

"What is the longest lasting lipstick?"

"What snacks are gluten free?"

"What clothing store has the best customer service?"

"Where can I get car insurance?"

"What banks have branches near me?"

"What car has the best gas mileage?"

Brand Questions

The study continued by asking the voice assistants a series of questions about 10 consumer brands in each of 20 different product categories. The questions were:

"What is [BRAND]?"

"How do I contact [BRAND]?"

"Where can I buy [BRAND]?"

Brands included ranged from Chevrolet and Adidas to Starbucks and JetBlue. In addition to recording the results from the voice searches, we also cataloged whether or not any of those brands had launched either Alexa skills or Google Actions. Since Siri and Bixby are still working on their onboarding plans for third parties, we did not look specifically for voice apps on these platforms but expect future evaluations may include this assessment provided brands start supporting these assistants.

SCOPE SUMMARY

5 DEVICES

WITH

4 VOICE ASSISTANTS

ASKED

4,000+ QUERIES

ABOUT

200 LEADING BRANDS

COVERING

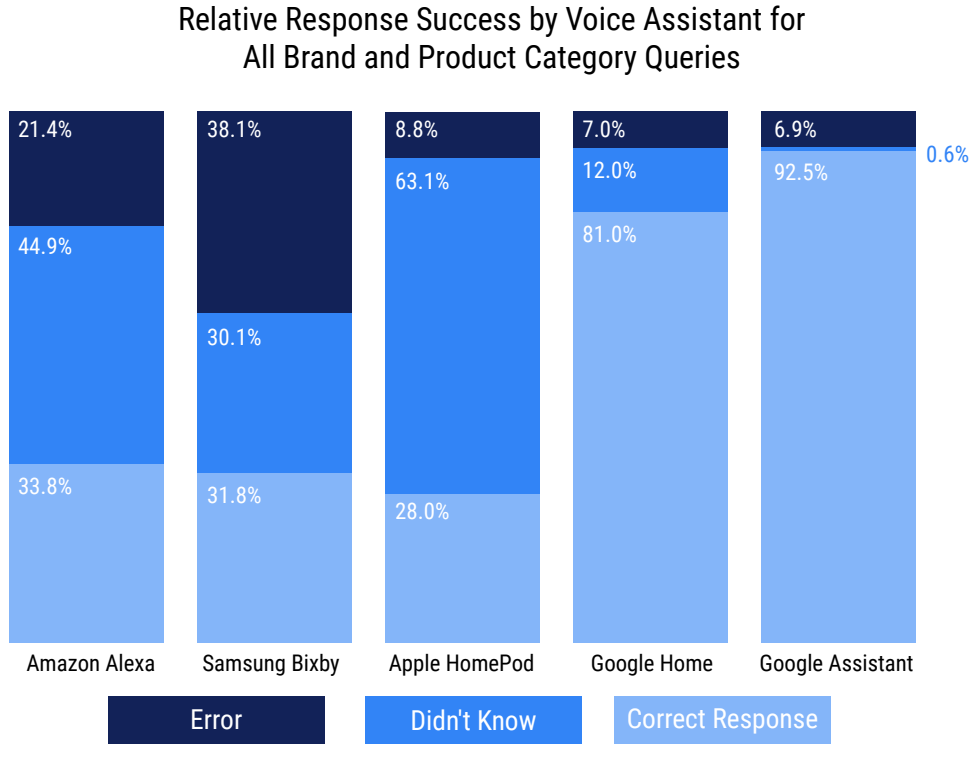
21 PRODUCT CATEGORIES

Google Delivers On-Brand Search Results

There are numerous search query tests that show Google Assistant beating its rivals for general knowledge queries. Many voice assistants do relatively well with these query types even if they cannot quite match Google. However, when it comes to product categories and information about leading consumer brands there is no question Google is in a different league.

When you combine results from all four question types, Google Assistant on a smartphone was able to offer a correct result for over 92% of all questions. Google Home results were 81% correct. Amazon Alexa came in third nearly 50 points behind Google Home and 60 percentage points below Google Assistant on the smartphone. Bixby is a relatively new entrant into the voice assistant battles with the 2.0 version arriving about nine months ago. Its overall score was about 2% behind Alexa while Apple HomePod showed the weakest performance at just 28% correct responses based on the query.

However, it is worthwhile noting that many of the failed responses were not necessarily caused by NLP errors. They instead reflected that the voice assistant could not answer the query. Apple HomePod led in this category as it did not even attempt to answer 63% of all questions. Samsung Bixby had the most attempted answers that were clear errors.



A Categorical Win

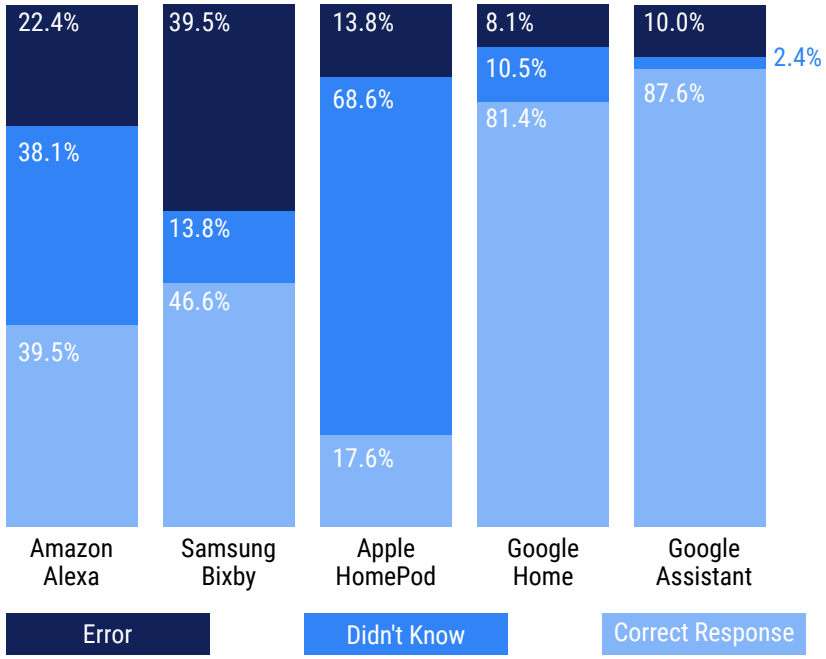
When it comes to answering questions about consumer product categories, once again Google Assistant outshines its peers whether accessed through a smart speaker or a smartphone. Apple's Siri is unable to answer most questions in this category and lets the user know it. "I can't get the answer to that on HomePod," is a common Siri refrain. Bixby leads once again in incorrect results.

The majority of Bixby's errors were the result of misunderstood intents which could be either an automated speech recognition (ASR) or natural language understanding (NLU) error. By contrast, Apple is liberal in saying it doesn't know the answer. That may be a result of strong ASR and NLU or simply a requirement that specific answers only be offered when confidence in the result is high.

A Choice Answer

Amazon, by contrast, is most likely to consult its own knowledge graph when answering product category questions. Sometimes these are simple answers and in many other instances a specific product from Amazon.com is offered for sale. This is particularly true when the word "best" is included in the question. For example, "What is the best deodorant for women?" One hundred percent of the time when a specific product is mentioned by Alexa it is an Amazon's Choice product and provides rating information and cost.

Relative Response Success by Voice Assistant for Product Category Queries

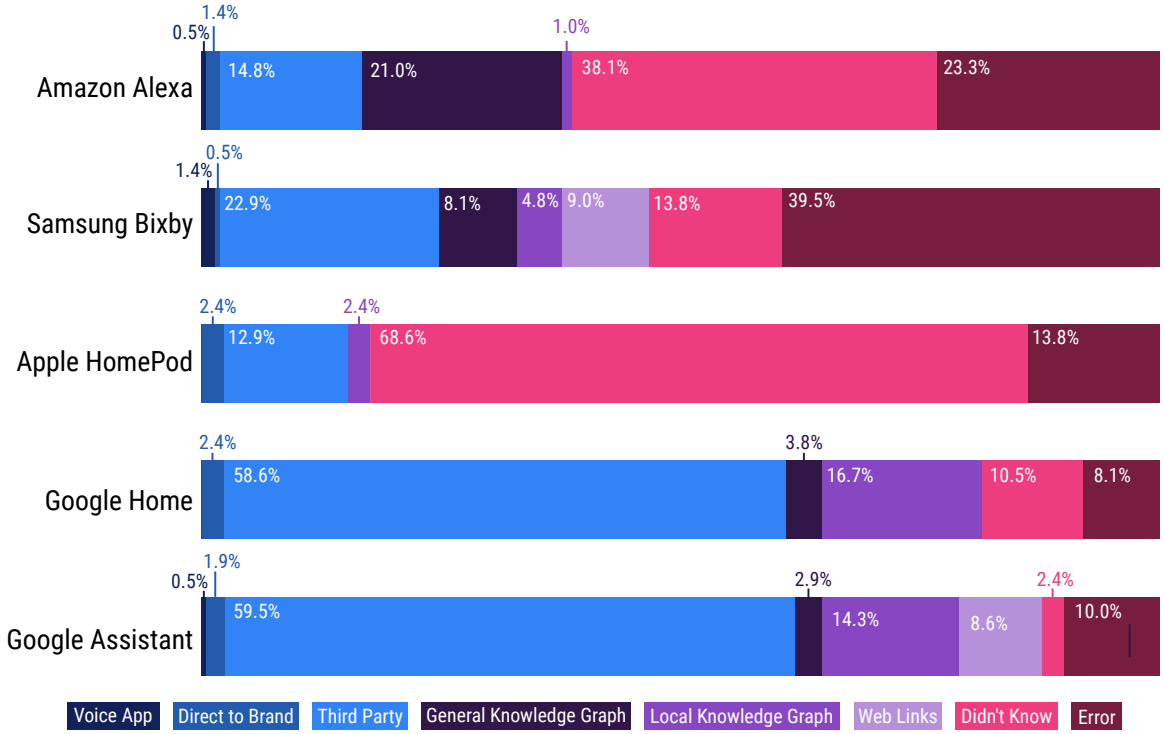


Very often, these Amazon Choice listing answers are reasonable responses to a request. These products achieve Amazon Choice status, at least in part, by having positive customer reviews and some reasonable sales volume. So, the products are “the best” based on Amazon’s criteria which involves feedback from consumer ratings and purchases. It is not surprising that Amazon did well in many of these questions given that its own knowledge graph is deepest in the area of consumer product information. It is after all the top search engine for product searches today.

Another interesting result from Amazon is the occasional answer from another Alexa user. When asked “Which beer has the most calories?” Alexa answers, “According to another Amazon customer, Samuel Adams Boston Lager has the most calories with 180 calories. Did that answer your question?”

This result is mined from Amazon’s Alexa Answers program introduced in late 2018. Information shared in December by Amazon said that in the program’s first month of beta testing more than 100,000 answers were provided by Alexa users and were delivered

Product Category Search Result by Voice Assistant



as answers to questions “millions of times.” We only noticed this type of response in three of over 800 questions asked of Alexa so it appears the database is not broadly applied yet to consumer product questions.

Hey Wiki, You’re So Fine

Results for voice assistant search look a lot like web search today when asking about a brand name. The number one resource for third-party knowledge used by voice search across all of the voice assistants is Wikipedia. Brands need to make sure the first sentence or two of their Wikipedia entry reflects their brand appropriately.

When voice assistants were asked “What is [BRAND NAME]?” the assistants referenced Wikipedia almost exclusively:

- Google Home // 99.4% of the time (172 out of 173 answered successfully)
- Google Assistant (phone) // 98.8% of the time (169 out of 171 answered successfully)
- Amazon Echo // 99.2% of the time (122 out of 123 answered successfully)
- Apple HomePod // 99.3% of the time (161 out of 162 answered successfully)
- Samsung Bixby (phone) // 87.6% of the time (141 out of 161 answered successfully)

Most brand marketers would prefer that these queries go to one of their owned properties, ideally a voice app, and if not, a website or social media page. There is a longer term play for marketers to steer these searches into their owned channels.

GOOD EXAMPLE // Jack Daniels
Establishes brand authority

“According to Wikipedia Jack Daniels is a brand of Tennessee Whiskey and the top-selling American Whiskey in the world…”

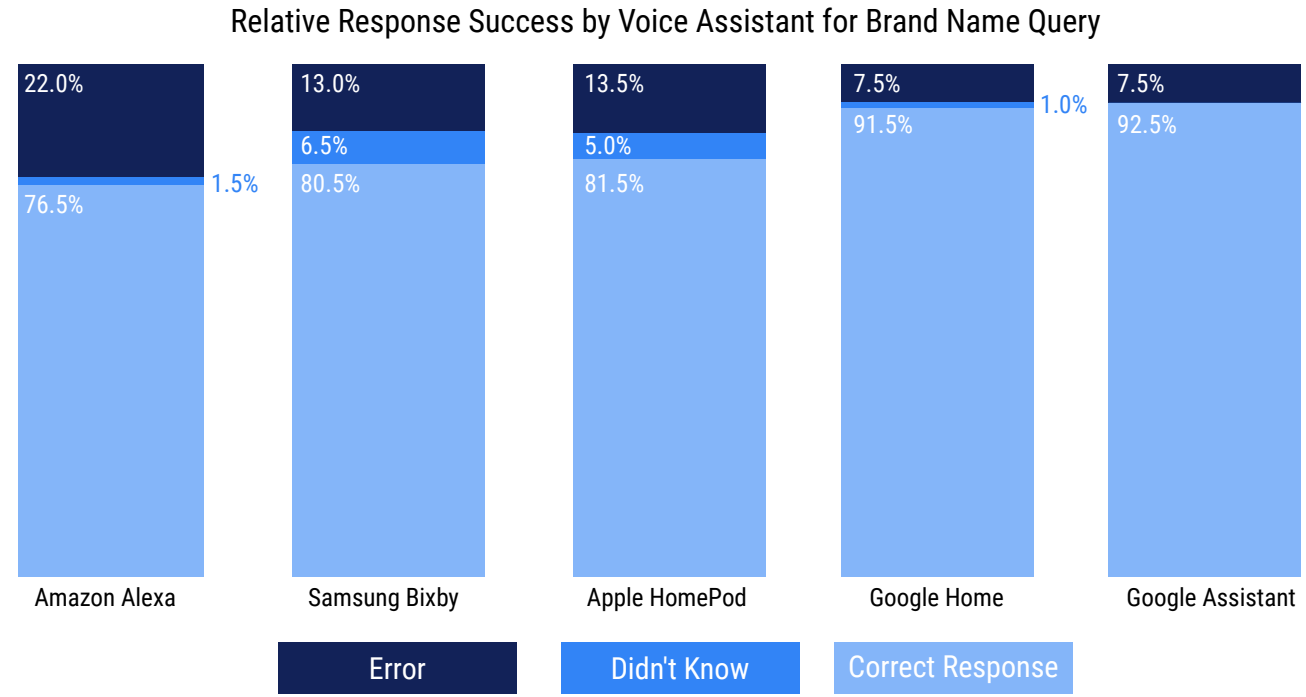
BAD EXAMPLE // Dasani
References competitor

“According to Wikipedia Dasani is a brand of bottled water from the Coca-Cola Company launched in 1999 after the success of Aquafina...”

However, the algorithms are what they are at the moment. Some brands are doing better than others when it comes to living with Wikipedia's current search results reign.

Wikipedia-Powered Accuracy

When you look at the search results data, it is immediately obvious why the leading voice assistants rely so heavily on Wikipedia. It helps them tremendously with their ability to accurately answer questions. Google Assistant on smartphones and smart speakers again leads in this test category, but the difference with its rivals is far less. Amazon Alexa did show a similar error rate of 22% as with the general questions about products. However, in that earlier test, Alexa was unable to answer 38% of the queries, but for these questions that fell to only 1.5%. In all, Alexa was able to correctly answer over 76% of these queries while Samsung Bixby and Apple HomePod both surpassed 80% by riding the robust information store that is Wikipedia.

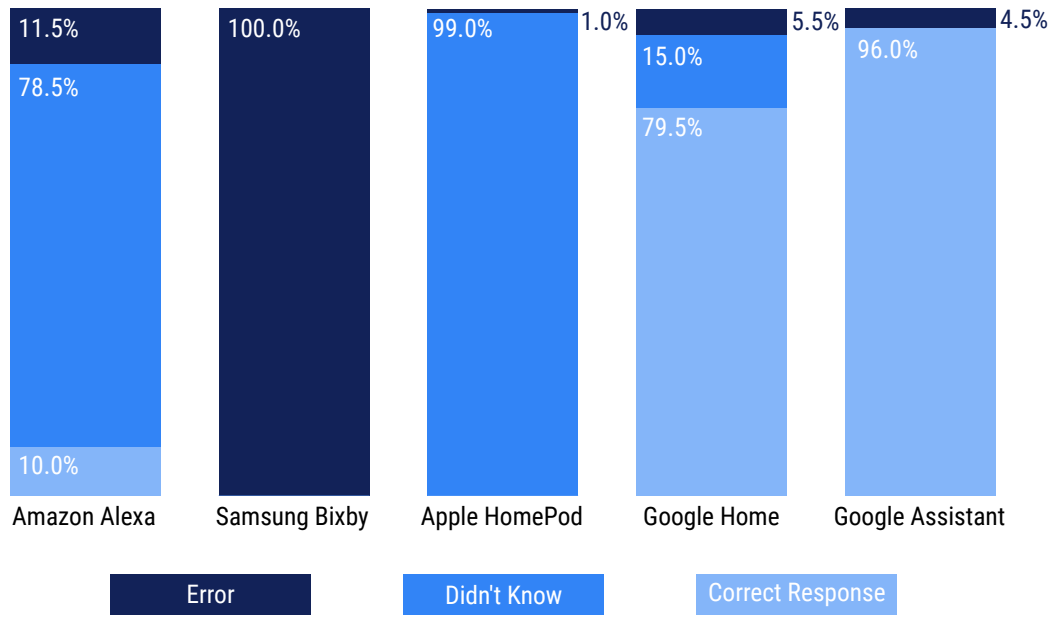


Call Me Maybe?

In the process of learning about a brand or in order to get support with a product, consumers sometimes need contact information. Asking your nearby voice assistant might be convenient, but only if the results are reliably accurate. Once again, Google's strength in search is exhibited when the question starts with, "How do I contact…" The other voice assistants essentially take a pass and don't really attempt to answer these types of questions.

Bixby stands out with a pile of errors because everytime you include "contact" in the query, it assumes you are trying to access your local contacts. That is an NLU problem that we assume will soon be addressed. However, in the meantime the end-results aren't that different from Alexa and Siri on HomePod. Siri fails to fulfill the intent, but lets you know, "I can't get the answer to that on HomePod." Alexa used a combination of a national telephone directory, local telephone numbers likely sourced from Yelp, reference.com, and wikiHow to answer 10% of these questions.

Relative Response Success by Voice Assistant for Brand Contact Query



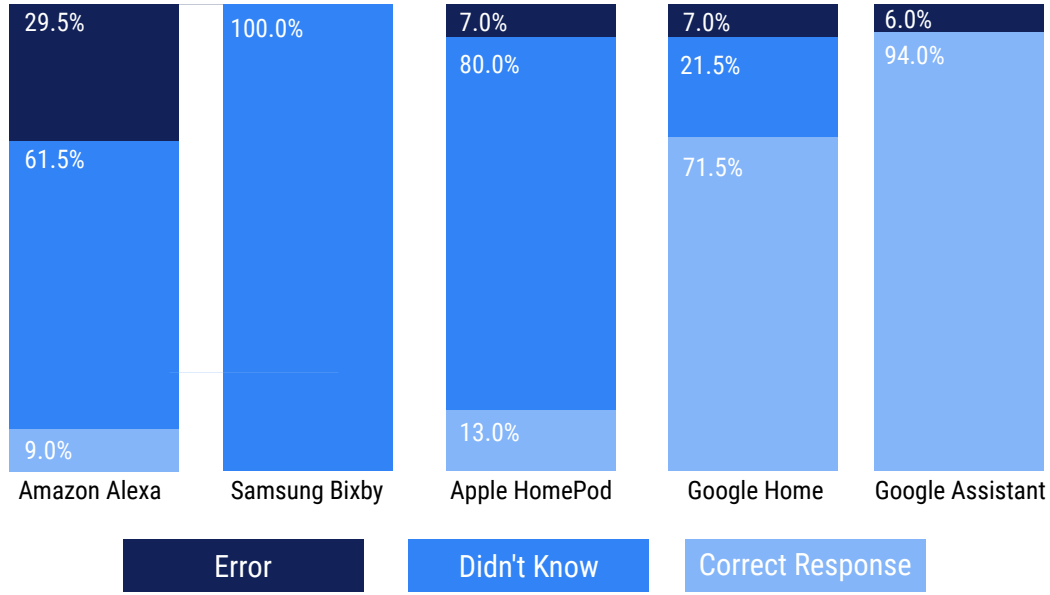
Google used a wide variety of information sources led by its core knowledge graph that was supplemented by both brand websites and third party sources. GetHuman.com and wikiHow were common third-party data sources identified by Google Home and Google Assistant. So, these are other data sources that may require some attention for brands to ensure they can be contacted when a consumer's interest is highest.

Won't You Buy Me a Mercedes-Benz

Sometimes, consumers simply need to know where to buy specific product brands. Once again, Google leads the pack by a wide margin for this information. A full 96% of these purchase location queries were successfully answered by Google Assistant on smartphones and 71.5% on a Google Home smart speaker. The next most successful was Apple HomePod with a 13% success rate.

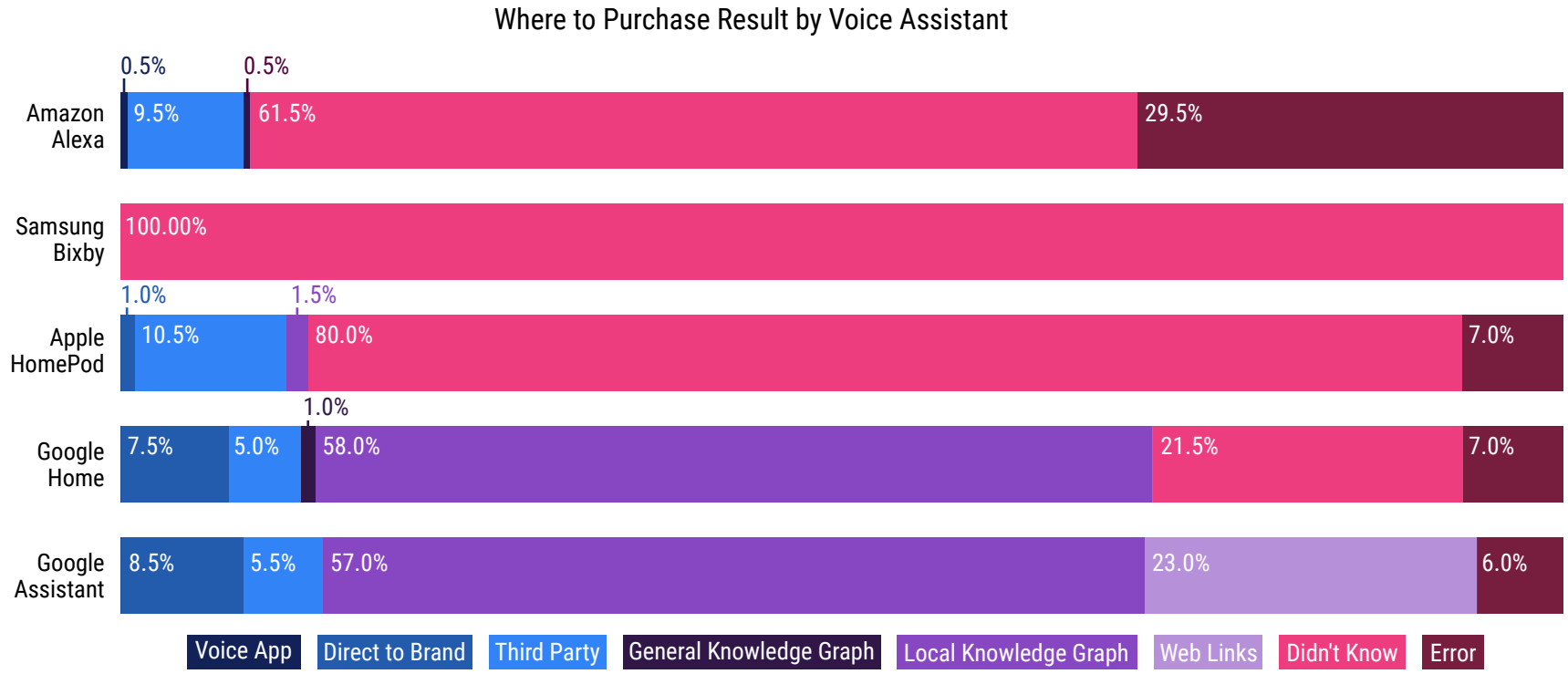
Similar to other categories, HomePod almost exclusively referenced Yelp when it was able to produce a correct result, but the vast majority of the time, it simply said the information was not yet available on HomePod. Bixby, for 100% of these queries responded, "Looks like that function isn't supported yet. I'll keep learning to make your experience better."

Relative Response Success by Voice Assistant for Brand Purchase Location



You might think that a question that starts with, “Where can I buy…?” would be easy for Amazon. Alexa could refer the user to Amazon.com or start suggesting some Amazon Choice brands. However, Amazon doesn’t sell all of the products that were queried and for others it seemed to be hitting the incorrect information source. Some of those sources were not related to the intent while others were for a location that was not geographically convenient for the user.

Many of the Google Assistant answers not only provided a location to purchase the requested products but also provided the inventory availability and price. This is the result of the local product inventory feed which enables retailers to list their goods for sale and makes them searchable through Google. The closest result by geographic distance will typically be the first result, but Google will provide additional options if you ask and want to compare pricing. Even when the other assistants could locate a place to purchase an item, they were not able to provide availability or pricing information.



Amazon Alexa Voice Search Insights for Brands

Wikipedia is a Key Source for Brand Information

Until you can get Alexa referring queries to your skill (see Canfulfillintentrequest below) or other digital property you own, it is a good idea to make sure the first sentence of your Wikipedia entry is accurate, and ideally on-brand. This will help you with your voice assistant SEO on Alexa and the others as well.

Yelp is Key Source for Local Searches

Yelp is the primary source for “where” queries and appears to pull the highest rated location nearby. Nealry 18% of correctly answered questions by Amazon Alexa that referenced a third party pulled the answer from Yelp (33 out of 186 location-relevant questions). Also, if Alexa cannot answer the query or cannot find anything local that has that information, it will pull results based on the key search terms.

Amazon’s Choice Pays Dividends on Voice

The prevalence of Amazon Choice products showing up as answers to product-related searches suggests the program has added benefits for voice search. That means strategies related to achieving Amazon Choice status may also result in voice search benefits through Alexa.

KEY AMAZON ALEXA INSIGHTS

- Wikipedia is a key source for brand information
- Yelp is key source for local searches
- Amazon’s choice pays dividends on voice
- Canfulfillintentrequest is not driving brand discovery yet
- Keep an eye on Alexa conversations

Canfulfillintentrequest is Not Driving Brand Discovery Yet

Last year Amazon introduced a new feature for skill developers called Canfulfillintentrequest (CFIR) that is designed to signal to Alexa when a skill can answer a specific type of question. We didn't see Amazon referring users to skills even though over one-in-four of these brands have one. Three things could be responsible for these outcomes:

1// The brands could answer some of the questions but have not yet implemented CFIR

2// The brands have not added content to their skills that can answer these types of queries so are not eligible for referral from Alexa because they cannot fulfill the user intent

3// Alexa is not yet fully leveraging CFIR data in fulfilling user requests

We suspect reality may be a combination of all three. However, two are in the control of the brand. It can deploy a skill that has content to answer common consumer questions and add CFIR data to signal to Alexa its capabilities. Very few brands have implemented FAQs for voice similar to what is common on websites. This could be the path to break out of the Wikipedia jail and have queries go directly to a skill the marketer controls.

Keep an Eye on Alexa Conversations

The other key Alexa development related to search and discovery is the June 2019 announcement of Alexa Conversations. This is a new programming approach that is designed to cut the code volume and data sample requirements of developers. In skills using this feature, Alexa will shoulder more responsibility for how the skill operates and in turn will know more about what it can do. That knowledge can then be used by Alexa to fulfill user intents that may require several skills to execute. This is referred to as cross skill goal fulfillment and by other terms, but is essentially Alexa asking multiple skills to fulfill elements of a complex user request.

The demonstration involved organizing a night out complete with movie tickets, dinner reservations, and a scheduled ride from Uber. Amazon will need to identify each of these user request scenarios and then configure them in some way to discover skills that can help. Voicebot has been told that the knowledge needed to discover these skills will require the developer to use the Alexa Conversations approach which is currently in developer preview.

KEY GOOGLE ASSISTANT INSIGHTS

- Local product inventory feed is important for product queries
- Local business info details are key to getting in top 3 results
- Google Assistant loves lists but not necessarily a FAQ page
- Google pulled back on implicit invocations

Google Assistant Voice Search Insights for Brands

Local Product Inventory Feed is Important for Product Queries

Google announced back in December 2017 that it was integrating its local product inventory feed with the Google Assistant to make it easier for consumers to find specific items locally. This service is available today for a wide-range of categories from beer and cosmetics to tablets and smartphones. Retailers that have this implemented are likely to get the number one slot or be available in a short list of options. And while Google continues to ask the consumer if they would like to hear more options, first is often best when it comes to voice.

The retailers that do this best are the larger box stores, such as Target, Walmart, Lowe's and Best Buy. One surprise was Total Wine and More, which has only 10% of the number of stores as the other leading retailers, but was referenced often for alcoholic beverages and even some other product categories it carries. This demonstrates that you do not have to have thousands of locations to take advantage of local product voice search.

Local Business Information Details are Key to Getting in Top Three

For nearby searches, Google Assistant lists the top three results for any "near me" or local query. This information is typically drawn from Google My Business pages. The key for local retailers is to add as many details as possible, especially considering the largest category of voice search on mobile is for local businesses. For instance, even though there are local places near me that provide catering, kid

menus, or a personal stylist, Google did not provide those that were nearest, but rather those businesses that added those details.

Google Assistant Loves Lists But Not Necessarily a FAQ Page

Google Assistant likes concise, fact-driven lists, but not necessarily a traditional FAQ page. FAQ pages today typically have a layout that features anchor links or accordions which are easy to read, but do not work for voice-first comprehension. Instead, Google Assistant tends to choose lists like "Top 5" or a concise break-down of important company information segmented by H2 headlines.

For Google Home, when asked general queries, four out of the five sources that referenced a brand website directly were blogs on topics directly related to their product in list form. This is more evidence that your reference content on the web is not necessarily voice-ready to answer questions.

Good Example

When asked, "How do I find the best skin care routine for me?" Google Home referenced a blog post from skincare retailer Dermstore titled "In What Order Do I Apply My Skin Care Products?" and then it provided a step-by-step list of the seven recommended steps.

Bad Example

When asked "How do I contact Adidas" Google Home did reference Adidas directly instead of using its knowledge graph. However, the Adidas site is your typical FAQ page which means Google Assistant responded "Here's a summary from the website m.Adidas.com Specialized Product 1. Baseball equipment 2. Cologne, Deodorant, Bath & Body 3. Eyewear and 4. Martial Arts." This was a poor, and essentially useless, voice user experience.

Google Pulled Back on Implicit Invocations

In 2018, we would have expected far more of these questions to be referred to Google Action voice apps by Google Assistant. The key signal to Google Assistant that a Google Action could answer a question was data added by the developer called implicit invocations (previously referred to as implicit discoveries). With this in place, consumers that don't know the name of a Google Action or even lacked awareness of its existence could be referred to it by Google Assistant. Some Google Actions were getting thousands of direct referrals from Google Assistant each month in 2018.

However, Voicebot has reviewed data and interviewed developers that show Google Assistant is referring far fewer generic voice queries to Google Actions. The change began toward the end of 2018 and the difference between Google Assistant referrals to Actions in October

2018 compared to January 2019 are significant in some instances. To its credit, Google did add a line to its developer documentation saying, “Due to the evolving nature of the recommendation algorithm, Google cannot guarantee that your Action will be recommended via implicit invocation.”

Google is characteristically not discussing its plans around implicit invocations and Google Action discovery. However, you should still implement them as a best practice. Google Assistant does today make direct referrals to Google Actions using implicit invocations even if the volume is greatly diminished. That could go back up again as the engineering team determines more effective methods for matching user intents with the abilities of Google Actions.

What About Siri and Bixby?

Siri doesn’t provide too many avenues for voice search optimization for brand marketers. The data show that it relies heavily on Wikipedia for generic questions about brands and Yelp for any information related to local businesses. Those represent your best options for optimization right now because almost all other queries are greeted with the dreaded “I’m sorry. I can’t get the answer to that on HomePod,” or “I couldn’t find any matching places.”

Siri does offer the concept of domains that you can add to iOS apps that enable Siri to interact with and access app features.There is also Siri Shortcuts which enables users to access app features based on a customer command or routine. However, these solutions have no connection to search. The requests must be explicit and the Siri services are not designed to drive discovery. You may see some of this change in 2020, but movement is not likely before then. Our testing on the iPhone suggests that your best strategy today for Siri is standard SEO for mobile with added emphasis on Wikipedia and Yelp.

As for Bixby, little can be done today around SEO or question-answer optimization. Bixby is in a 2.0 release and is still building out its capability set. Based on comments from company leadership, it is likely Bixby will seek to integrate with more third-party content sources to support robust voice search in the coming months and years. In addition, we still don’t know how Bixby will discover capsules (voice apps) that are relevant to users. That is said to be a core part of how Bixby is architected and may become more clear soon, but for now, we wait.

GRADING THE "EXPERTS"

WHAT SEO EXPERTS RECOMMEND

Rank	Recommendation	Articles Appeared In
1	Optimize for conversational trigger words	76%
2	Use colloquial phrasing	50%
3	Create solid web SEO foundation	45%
4	Focus on ranking for the featured snippets in Google	42%
5	Provide concise answers to questions of fewer than 29 words	42%
6	Optimize for local, “near me” questions	37%
7	Optimize for long-tail search queries	37%
8	Optimize for site speed	34%
9	Look at questions your target market is asking about your product	29%
10	Implement website security	24%

How the Search Industry Views Voice

We first evaluated consumer adoption of voice search and then assessed data we gathered from asking voice assistants about brand and product related searches. We also wanted to look at what more traditional SEO experts are saying about optimizing for voice search. In reviewing 38 articles and blog posts from the past year on voice search we identified 27 distinct strategy recommendations.

A few of these recommendations such as latent semantic indexing and selling on Amazon only received a single mention. However, a few recommendations arose frequently. By far the most common, appearing in 29 of the 38 articles, was the need to optimize for conversational “trigger words” such as Who, What, Why, Where, When, How, Best, and so on. This is not only common advice, but the data in Voicebot’s own study suggests this is a big gap for many brands. The top 10 most common recommendations from SEO experts to optimize for voice search are listed in the table nearby.

What does this information tell us? First, there is no consensus in the SEO industry on what should be done to optimize for voice search. Second, many of these recommendations are commonly found in lists for website or mobile SEO. There is clearly some overlap between web search and voice assistant led search, but there are many differences. The question then remains, what can brands do to position themselves for success in voice search especially for those consumer questions which are increasingly being answered by voice assistants?

Matching the Experts with Answer Data

The top result from the experts is logical. These trigger words were common among the queries Voicebot asked of the voice assistants in our study and that reflected how many consumers are phrasing requests like this every day. However, the data today doesn't suggest efforts around trigger words are having much impact for brands.

Surely some brands have taken the time to optimize for these search trigger terms but a traditional web search typically brings up information from media companies using these same terms or information aggregators such Wikipedia and Yelp. Today, the leading voice assistants seem to favor web page content with only slightly higher frequency than voice apps and both are rare occurrences for brand-related searches.

Two strategies we can see from our research data that can work for brands are optimizing for Yelp and securing a position as Amazon's Choice. These recommendations were only included in 11% and 5% of the expert articles respectively. You should definitely shore up your Yelp and Amazon shopping profiles if this is practical for your company even though these tactics are overlooked by most SEO experts. In addition, optimizing for reference websites such as Wikipedia, wikiHow, and GetHuman may also bring near term voice search discovery benefits.

Vague Guidance and the Promise of Voice Apps

Of all the leading voice assistant providers only Google has offered specific guidance on the topic of voice search. The Evaluation of Search Speech Guidelines was published by Google in December 2017 and the document has not been updated as of June 2019. A blog post from the time of publication outlined how Google was thinking about the problem:

> The Google Assistant is designed to provide help and information across a variety of platforms, and is built to bring together a number of products — including Google Maps, Search, Google Photos, third party services, and more. For some of these products, we have released specific evaluation guidelines, like Search Quality Rating Guidelines. However, the Google Assistant needs its own guidelines in place, as many of its interactions utilize what is called "eyes-free technology," when there is no screen as part of the experience.

The blog post and document went on to depict several examples of voice assistant searches and created a rubric for human testers to evaluate results. The key components include:

> Information Satisfaction // The content of the answer should meet the information needs of the user.

Length // When a displayed answer is too long, users can quickly scan it visually and locate the relevant information. For voice answers, that is not possible. It is much more important to ensure that we provide a helpful amount of information, hopefully not too much or too little. Some of our previous work is currently in use for identifying the most relevant fragments of answers.

Formulation // It is much easier to understand a badly formulated written answer than an ungrammatical spoken answer, so more care has to be placed in ensuring grammatical correctness.

Elocution // Spoken answers must have proper pronunciation and prosody. Improvements in text-to-speech generation, such as WaveNet and Tacotron 2, are quickly reducing the gap with human performance.

This doesn't tell us what to do, but it does offer some insights. The examples in the documentation provide some context about how the scoring algorithm is rating information satisfaction of potential answers. It also mentions length of response. The fifth most common recommendation that was identified by 42% of the SEO experts suggests that answers be no longer than 29 words. Of course, as good as this guidance may be, Wikipedia and other information repositories are still dominating search results through Google Assistant.

Samsung and Apple have been silent on these topics so far.

Amazon has focused on five strategies that will shape its search results over time:

1// Adding new information sources such as Wolfram Alpha and Yext to complement its earlier integrations with Bing and Yelp.

2// Integrating is own product search engine from Amazon.com to surface products for sales when relevant to a user question.

3// Initiating a crowdsourcing knowledge graph supplement called Alexa Answers which sources answers from Amazon Alexa users.

4// Implementing Canfulfillintentrequest so Alexa skill developers can indicate the type of questions they can answer to help users

5// Demonstrating Alexa Conversations and cross skill goal completion which will provide Alexa with even more information on what skills can do to meet user requests.

So far, the data show that the first and second strategies of third-party information sources and Amazon.com's product search graph are the dominant forces impacting search results related to brands and product categories. Strategy three is starting to show up but not often. The longer term tools to help Alexa respond to queries by delivering results from Alexa skills appears to still be an early stage work-in-progress.

PRACTICAL VOICE ASSISTANT SEO STRATEGIES

Where Voice Search is Headed and Things You Can Do

Through the balance of 2019, we expect voice search frequency to grow while the results provided through voice assistants follow the current pattern. This may shift in 2020 as there are changes being implemented this year that are likely to affect search result algorithms.

With that said, voice search going forward will increasingly be manifested as voice assistant-led search. Why would users go to a web page or text-based app and select a microphone when the voice assistant often requires no added steps? Users can simply start speaking or potentially tap a dedicated button on a device to get started. This is the lowest friction approach to initiating search. It may come with a perceived downside of hearing fewer responses than you see in a text-based search with “10 blue links and a snippet” but it wins the convenience contest.

In addition, voice assistants are the only vehicle today to match a voice query with an audible result. This may be accompanied by a visual of some sort, but matching a spoken question with an audible response is the best aligned user experience no matter how you augment it. Finally, there will also be text-based searches conducted through voice assistants as you see today in Google Assistant on smartphones. Assistants are likely to become increasingly used for multimodal input as well as output.

Search data today around queries that are impactful for brands suggest this shift to voice assistant SEO requires you to optimize for each assistant as opposed to some generic search that mimics the web experience. No voice assistant is yet dominant and it looks like four are likely to have large user bases with dozens more potentially providing niche expertise over the next several years. Since each voice assistant is constructing its search algorithm differently, it will be important to consider the nuances as you optimize for brand discovery and engagement. Granted, today, you can take several shortcuts for Wikipedia and Yelp optimization along with supporting shopping programs sponsored by

Amazon and Google. Over time, the assistants will seek to more expertly curate the responses to deliver a better user experience and these generic sources will yield to a growing library of voice-optimized results.

This means you should look at voice assistant SEO in both the near term and longer term. Conversational experiences such as voice apps are likely to get more traffic so there are some steps that can deliver results today while others will become robust referral engines as the voice assistants update their algorithms. If you are a brand marketer, you can largely ignore most of the voice search articles today based on our analysis that the tips aren't likely to make a big difference. That being said, these suggestions won't hurt. Most of the recommendations are also good web search hygiene. Things you can do today to better position your brand for voice assistant SEO are listed in the table nearby.

TEN STEPS FOR BRAND VOICE ASSISTANT SEO

#	Action	Rationale
1	Optimize your Wikipedia and Yelp profiles	These are goto sources for all voice assistants.
2	Sign up for Google Express or develop a strategy to achieve Amazon Choice status	These are strategies to become shopping options for users.
3	Implement Local Product Inventory Feed with Google if you are a retailer	Delivers compelling consumer discovery while they shop by voice
4	Claim your Google My Business profile	This can help your business show up in local searches through Google and Google Assistant.
5	Launch a voice app, or several	Canfufillintentrequest (CFIR), Alexa Conversations, Implicit Invocations and the like will all get better at identifying voice apps to refer and having something available is the first step to discovery. Also, you might want to have some voice apps designed solely to answer questions with trigger words about your product or service or even tailored to specific topics so there is no ambiguity on what intents you can fulfill better than Wikipedia.
6	Add CFIR and Implicit Invocations to your voice apps	Mapping these "intents" will enable you to earn referrals over time from Alexa and Google Assistant.
7	Build your Alexa skills going forward with Alexa Conversations	This feature will further raise your signal with Alexa for answering search queries.
8	Optimize your profiles on aggregation websites such as wikiHow and GetHuman	This can help drive a voice search to your webpage directly.
9	Use Schema structured data markup	For searches that do make it to webpages, many data points such as contact details for a business are more easily surfaces using schema.org structured microdata. Google Assistant uses this today in some circumstances.
10	Answer your trigger word questions in concise formats	The 29 words limit may or may not be a good goal for voice assistant search discovery but brevity is critical in any answer that will be read to a user as text-to-speech. 29 words is 10-12 seconds of standard speech. That is a good target. Answer "What, How, Where, When, and Who questions in your voice apps and on your web properties"

Voice Assistant SEO: Voice Apps and Other Data Sources

Brand marketers are correct to think about voice assistants as a new channel to create consumer engagement. This often means developing a voice app that includes a primary objective to drive consumer interaction, raise awareness, or initiate a conversion of some sort. However, consumer discovery of your brand or discovery of answers related to your brand can go beyond the voice app experience. This means that many brand marketers are well advised to either include information in their experience-focused voice apps that answer common consumer questions or launch standalone voice apps dedicated to providing this type of information.

There are also many steps marketers should take today beyond voice apps to optimize for voice assistant SEO. The assistants are likely avoiding voice apps today for search results because few are optimized to answer common questions. As a result, it is easier for the voice assistants to use “tried-and-true” sources from web search until they can better assess answer quality delivered by individual voice apps. That means optimization for those deep data repositories that curate information in soundbite form should be incorporated into your voice assistant SEO strategy.

Consumers say they are conducting an increasing amount of search by voice. Whether or not it is 50% of all search doesn’t matter much if it a quarter of a trillion searches are conducted by voice annually. Voice search is already at scale. Brand marketers need to pay attention to what sources are answering questions about them and their product categories. We hope this analysis dispels a few myths and provides a clearer path to voice assistant SEO success.

Additional Resources

Smart Speaker Consumer Adoption Report 2019

DOWNLOAD NOW

In-Car Voice Assistant Consumer Adoption Report

DOWNLOAD NOW

Voice Assistant Consumer Adoption Report

DOWNLOAD NOW

Voice UX Best Practices Ebook

DOWNLOAD NOW

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