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Overview of the Voice landscape 2022.

Why are Voice Assistants the next wave of digital engagement?

50%
market penetration

Voice assistants like Alexa, Siri and Hey Google have been rapidly gaining popularity since Siri burst onto the scene in 2011. When smart speakers launched they became the fastest selling consumer goods to reach 50% market penetration.

500M
Voice enabled devices

By 2018, there were half a billion voice enabled devices and the ability to communicate with voice assistants is now being incorporated into billions of third party products from microwaves to supercars. This third party OEM approach is driving the expectation of more voice enabled devices than humans by 2024.

50%
of total ecommerce

Mobile commerce took 50% of total ecommerce share in the 10 years between 2010 and 2020. Voice commerce will grow faster than mobile did as payment mechanics are already embedded within voice assistants in the form of Amazon/Apple/Google Pay.

3 key drivers of voice.

1 Ease of Use

We can communicate 3x faster using our voice than using a mobile keyboard (161.20 vs. 53.46 WPM) The learning curve for voice assistants is steep. If you can speak, you can quickly get a good user experience. Q4 2021 86% of UK consumers under 54 have used their voice to interact with some form of digital device in the last month (up 5% since Q2)

2 Powered by FAAMG

Facebook, Amazon, Apple, Microsoft and Alphabet's Google (short FAAMG) are the key drivers of physical voice devices and virtual voice assistants software. Not to mention Chinese tech giants such as Alibaba, Baidu or Xiaomi. However, Amazon is still a major player for smart speakers in the UK, as 77% of smart speaker owners have devices powered by Alexa¹. The size of the companies that create these voice assistants is vast. They hold an unimaginable understanding of user desires, triggers and how to market their products. As a consumer we will choose a voice assistant like we have chosen a mobile operating system (are you Android or iOS?) and with that comes enormous power to the assistant owner. These tech giants are very good at nudging your behaviour and where it reduces friction in your life it's hard to refuse.

3 User behaviours

Looking at the number one use case for smart speakers, 88.7% are using their device to listen to radio in general with 39.8% having a daily habit of tuning into live radio via their smart device². The voice market and the adoption of voice-enabled devices like smart speakers are undetachable from the audio market and influence listening behaviours tremendously. For advertisers this means any voice strategy should be tied to an audio strategy and vice versa.

Audio to web parity.

Web



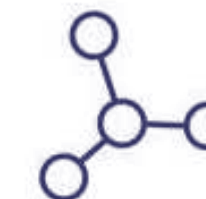
Display ad



Engagement



Landing page / microsite



Live data and reporting

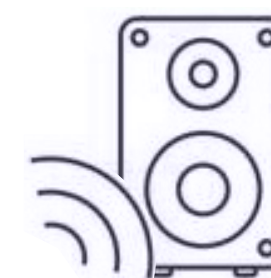
Audio



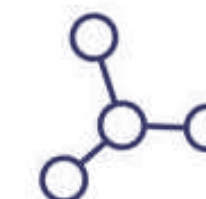
Audio ad with voice CTA



Human voice response



Voice dialogue



Live data and reporting

Making charity donations easier with Alexa.

Say It Now and Octave Audio joined forces with a series of charitable partners to make it easier for people to make charity donations via Alexa, a voice assistant housed within smart speakers.

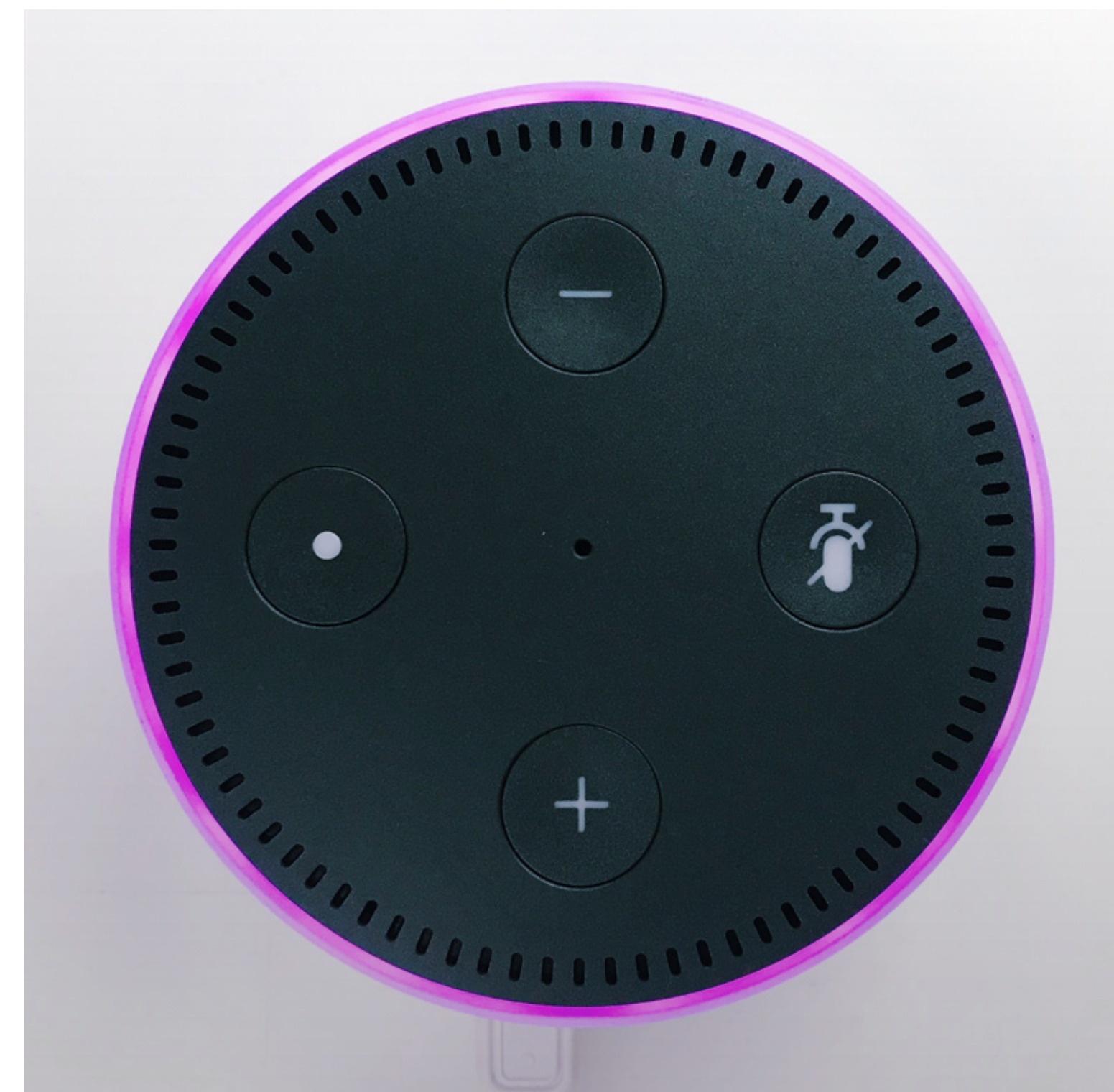
This decision was driven by three key factors. Firstly, against the backdrop of a pandemic that shook the charity sector to its core; donations dropped during a time of economic downturn and fundraising events were cancelled due to social distancing restrictions³.

Secondly, digital audio listening boomed during lockdown, with over 30m adults tuning in per week, often listening to their favourite stations through their smart speakers – with the number of people listening on voice activated speakers overtaking desktop/laptops for the first time ever in Q1 2021⁴. Lastly, it was found that Octave smart speaker listeners are 33% more likely to regularly donate to charity via the internet and more generous than Octave's mobile and desktop listeners⁵.

Aware of the acute impact of the pandemic on charities, and the insights about Octave's audience behaviour, Say It Now and Octave believed they could help mitigate this significant fundraising shortfall by raising awareness and driving donations – all by using Actionable Audio Advertising to target listeners and engage with them via simple, interactive means that only required the listener to use short voice commands.

As a result, Say It Now and Octave were able to effectively target a record number of radio listeners through Actionable Audio Adverts that were rooted in insight, creativity, and innovation.

The charitable partners we worked with include leading UK charities: NSPCC, Crisis UK and Macmillan. The campaigns ran between August and December 2021.



The challenge.

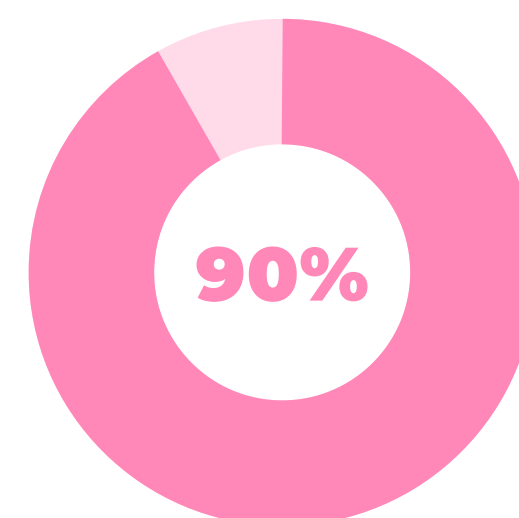
Covid-19 has had a severe impact on different sectors across the country, and amongst the worst hit were the nation's charities – who rely on donations to support those most in need.

According to research conducted by the Charity Commission, more than **90% of charities have been negatively affected by Covid-19**, and **62% of charities say that they "anticipate a threat to their charity's financial viability during the next year"**.

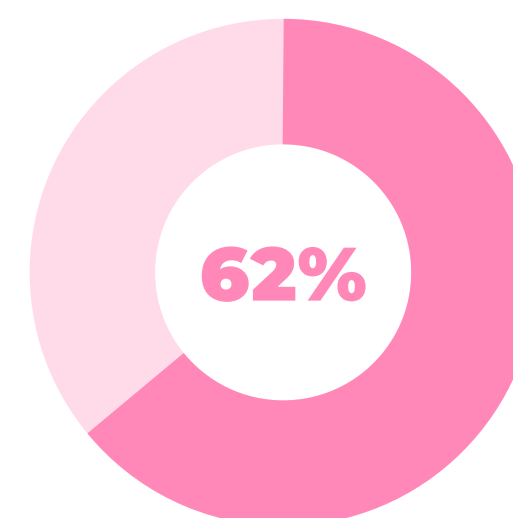
This impact has been compounded by the fact that, during the pandemic, the move towards a cashless society has accelerated; charities in the UK and worldwide take more than **50% of their donations in cash**⁶.

Aware of the acute impact of the pandemic on charities, Say It Now and Octave believed they could help mitigate this by raising awareness and driving donations – all by using Actionable Audio Advertising to target listeners and engage with them via simple, interactive means that only required the listener to use short voice commands.

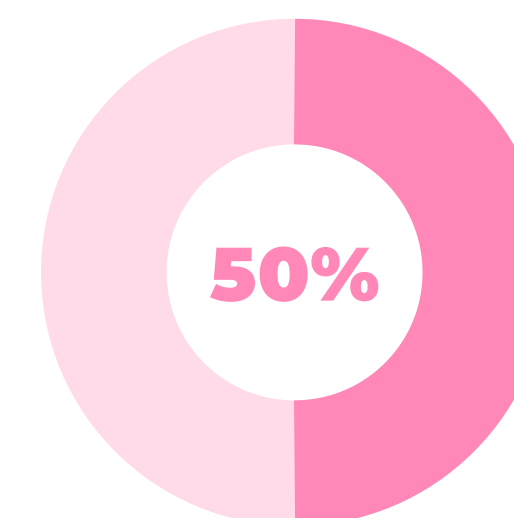
This was rooted in strategic insight: data shows that, as of March 2020, **34% of UK homes had a smart speaker**, and **digital radio listening has increased 12%** on these devices since the start of



90% of charities have been negatively affected by Covid-19



62% anticipate a threat to their charity's financial viability



50% of donations in the UK and worldwide are cash

the pandemic⁷. Research from Bauer Media found that during the pandemic, **59% of audiences listened to more radio on their smart speakers** than ever before, with **61% of them stating that they would continue** this increased smart speaker listening after restrictions have been lifted. Further, due to Octave's transparent portfolio of premium Radio brands - such as Magic Radio, Absolute Radio, Virgin Radio and talkRADIO - **Octave was able to identify smart speaker listeners as 33% more likely to regularly donate** to charity via the internet and even more generous than Octave's mobile and desktop listeners⁸.

Based on these insights, and in collaboration with our charitable partners NSPCC, Crisis UK and MacMillan, we set out with a key objective:

Use Actionable Audio Adverts to raise awareness and drive donations to help mitigate the negative impact of Covid-19 on these charities.

From this objective, our strategic approach was very clear and very simple:

- **Create interactive, Actionable Audio Adverts for the charities**
- **Raise awareness and drive charitable donations**
- **Continuously review the real time audience engagement data to adapt and improve the campaign**

The solution.

Say It Now worked in partnership with Octave Audio's expertise to enhance the powerful combination of digital targeting capabilities with the proven benefits of Radio advertising further by creating commerce ready branded voice first environments within the Alexa platform for listeners to engage, inspired by the audio campaigns.

By making audio adverts actionable and interactive, we enabled our charity partners to start a truly engaging, conversational experience with their key audiences (e.g. donors) and deliver a much stronger call to action. Working with our programmatic partners, we created audio campaigns that listeners could directly interact with – by requesting more information about the charity or by donating all through simple voice commands on their smart speakers.

It was this creativity and innovation that we embedded throughout our charity campaigns which invited digital listeners of Bauer Media and News UK stations to learn more about the individual charities and make donations securely through speech.



Crisis

Our Crisis campaign, the Actionable Audio Advert voiced by widely -recognised comedienne Jo Brand said to listeners:

“...Crisis is providing food, advice, a place to stay, and is helping people find somewhere to call home. Please donate by simply asking your smart speaker to ‘open Crisis UK’. Help someone take their first steps out of homelessness. Say ‘Open Crisis UK on this device now.’”



NSPCC

Similarly, our NSPCC campaign said:

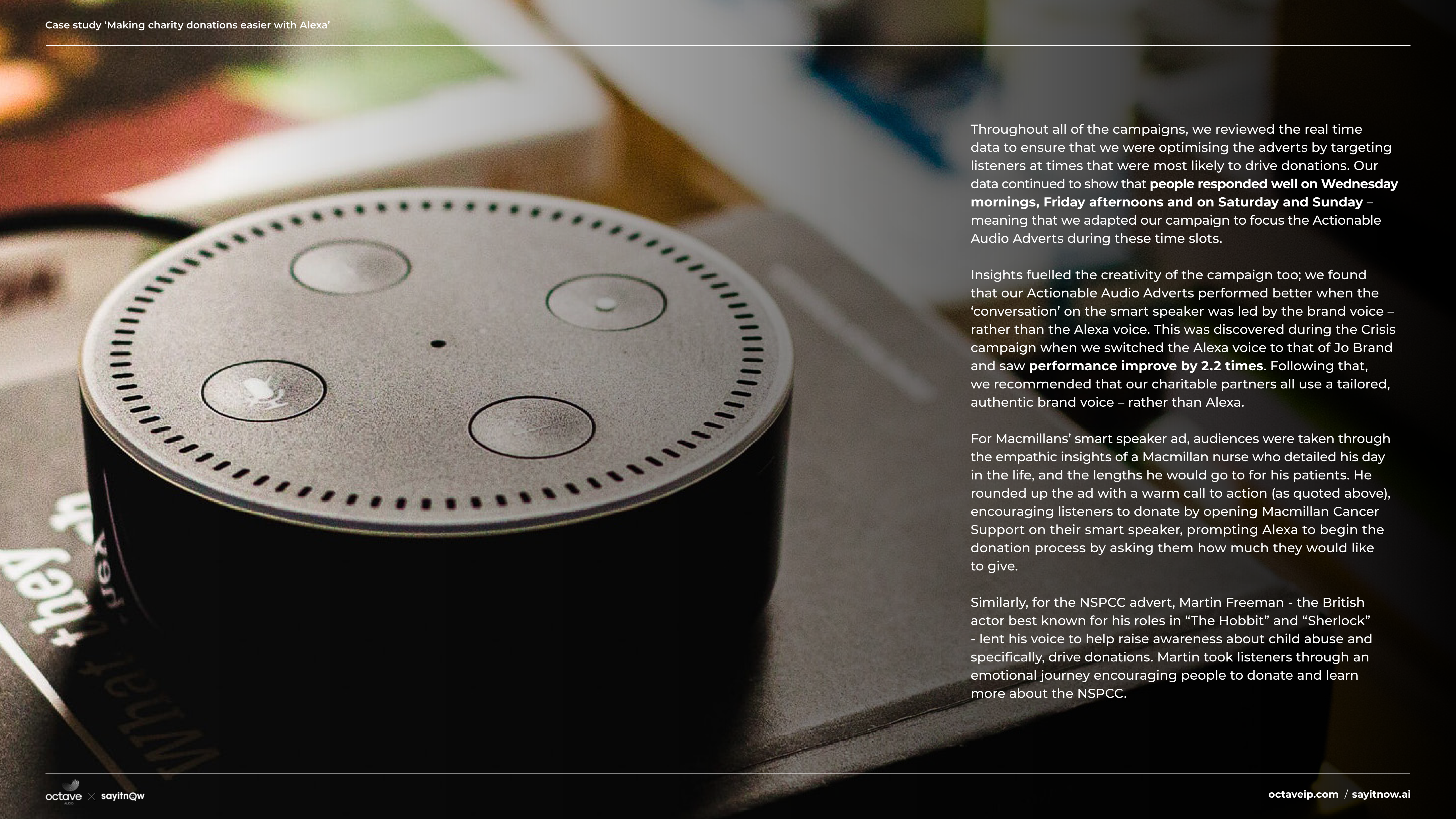
“...A child contacts the NSPCC's childline service every 25 seconds and you can help them now by using your smart speaker. Simply ask your device to open NSPCC to make a donation.”



MACMILLAN CANCER SUPPORT

And for our Macmillan advert, it said:

“There is nothing that I wouldn't do for my patients. I'm a Macmillan nurse. If they want me to stay with them at night while their partner gets some sleep, they just need to say. I do whatever it takes. So asking you to donate isn't a problem either. Just say: “open Macmillan cancer support to your smart speaker.””



Throughout all of the campaigns, we reviewed the real time data to ensure that we were optimising the adverts by targeting listeners at times that were most likely to drive donations. Our data continued to show that **people responded well on Wednesday mornings, Friday afternoons and on Saturday and Sunday** – meaning that we adapted our campaign to focus the Actionable Audio Adverts during these time slots.

Insights fuelled the creativity of the campaign too; we found that our Actionable Audio Adverts performed better when the ‘conversation’ on the smart speaker was led by the brand voice – rather than the Alexa voice. This was discovered during the Crisis campaign when we switched the Alexa voice to that of Jo Brand and saw **performance improve by 2.2 times**. Following that, we recommended that our charitable partners all use a tailored, authentic brand voice – rather than Alexa.

For Macmillans’ smart speaker ad, audiences were taken through the empathic insights of a Macmillan nurse who detailed his day in the life, and the lengths he would go to for his patients. He rounded up the ad with a warm call to action (as quoted above), encouraging listeners to donate by opening Macmillan Cancer Support on their smart speaker, prompting Alexa to begin the donation process by asking them how much they would like to give.

Similarly, for the NSPCC advert, Martin Freeman - the British actor best known for his roles in “The Hobbit” and “Sherlock” - lent his voice to help raise awareness about child abuse and specifically, drive donations. Martin took listeners through an emotional journey encouraging people to donate and learn more about the NSPCC.

Tangible results and outcomes.

When measured against our objectives, we saw that our charitable campaigns were a significant success, with many audiences engaging and showing positive intent, i.e. interacting with the content to learn more, play a game or access any other content:

Crisis

57.5%

positive intent

22.7%

donation intent

For the Crisis campaign, well over **half of active users (57.5%) showed a positive intent** and more than **one in five moved to a donation intent (22.7%)**. The voice of Jo Brand helped to drive **2.2x as many unique users** (ad reach) compared to the Alexa voice. Conversions to donation intents also saw a **2x increase**.

NSPCC

81.8%

positive intent

42.9%

opted to learn more

For our NSPCC campaign, of those who listened to the Actionable Audio Advert and 'activated' (or engaged with) the advert, **81.8% showed a positive intent**, while **42.9% opted to learn more** (helping to drive awareness of the campaign) and **6.8% donated**. Listeners spent an **average time of 1.5 minutes in the experience**. The conversion rate of entering the voice experience to a completed **donation stood at 11%**.

**MACMILLAN
CANCER SUPPORT**

24.4%

positive intent

16%

donation intent

For the Macmillan advert, **one in four (24.4%) of active users showed a positive intent** and **16% moved to a donation intent**.

Tangible results and outcomes.

Claire Rowney

Executive Director of Fundraising, Marketing and Innovation at Macmillan Cancer Support, said:

“Macmillan relies almost entirely on public donations to do whatever it takes for people living with cancer, so utilising a new channel to encourage listeners to donate through their smart speakers was a real game changer when responding to the fundraising challenges caused by the pandemic and reaching people at home. At a time when people with cancer need us more than ever, it has been really encouraging to see this innovation drive user engagement and donations, with one in four (24.4%) users showing a positive intention by activating the Macmillan skill and 16% moving towards making a donation.”

Daniel Gray

Transformation Lead at Crisis UK, said:

“The ability for listeners to speak back to our audio ad campaigns appealing in a growing cashless society. We wanted to find a solution to increase donations using a new channel to us, voice. We were pleased to see Say It Now and Octave Audio provide real-time data on performance, where we learned that Jo Brand’s voice helped to drive over two times as many unique users. It was intriguing to observe how this linked into consistent performance across the Alexa skill, and was a key brand learning for us that we could to optimise the ausio campaign in real time.”

Our results showed that when listeners engaged with the Actionable Audio Advert on smart speakers, **the results were overwhelmingly positive.** They enabled the charity campaigns to effectively raise awareness of their cause and drive immediate donations.

In summary, the joint initiative of Say It Now’s Actionable Audio Adverts and Octave’s access to insights and premium audiences at scale helped charities to bounce back after the pandemic at a time when donations plummeted, raising awareness and driving donations. The adverts injected immediacy and discoverability, utilising the high levels of trust audiences have with radio and combining that with the data insights and interactivity that Digital Audio can bring.



Guest contribution by Veritonic.

How to: a guide to harnessing the potential of actionable audio advertising

The “battle for the ears” is real, and advertisers and brands alike are recognising both creativity and quantifiable measurement data as two critical components of their audio strategies. So how do you make audio actionable when you can’t see it or touch it like other digital formats?

Explore new voice tools and platforms

A new range of responsive ad formats have started emerging in the last couple years – whether they are being broadcast on smart speakers, podcasts, or streaming music platforms – indicating audio advertising is growing and changing for the better. For example, the adoption rate of smart speakers around the world is burgeoning - over 38% of UK adults owned a smart speaker at the start of 2021, up from about 31% a year earlier⁹.

Consumers can now enter the world of voice - listen to a podcast or a recipe on their smart speaker whilst cooking - and not leave that experience to engage with a brand’s advertising.

By removing this barrier, a brand simply has to focus on ensuring that their voice and message are clear, resonating, and organic to the listening experience.

Know your audience - and their preferences

At Veritonic, our research has shown that speaking directly to your target audience will result in greater memorability, engagement, and emotional response. Therefore it is of prime importance to mind the tone and ensure that the voice you use feels familiar to your audience and encompasses your brand’s values and personality.

Additionally, the profile of voice talent is often an overlooked detail that can have monumental effects on performance. For example, in the Fast Food category, a lesser percentage of audio ads use a female voice, even though we continue to see that female voices over-index when it comes to performance. Testing various voiceover talents with different vocal characteristics is encouraged to see which resonate most with your target audience.

So what does that mean for celebrity voice talent? Do their voices always lead to a spike in attention? Not as consistently as you might think. This is why leveraging data to ensure the millions of dollars you’re dropping on an A-List celebrity is paying off, and isn’t equivalent to the return you’d see from a standard voice actor.

34%
of UK adults own
a smart speaker

31%
more than
a year earlier

An example where it certainly did pay off was for the Crisis skill on smart speakers. Engagement levels and subsequent donations increased when Jo Brand’s voice was used in place of the Alexa voice in the Crisis skill.

The bottom line? Don’t be afraid to experiment with ways to deliver your message in an optimised fashion for all of your audience segments.

Use insights and data to measure performance.

So, what makes experimentation and taking risks possible - without risking your job and the success of your marketing campaigns in the process? Testing.

When making audio creative decisions, measurement is a critical piece of the puzzle for all advertisers and brands. The ability to continuously optimise and evolve your audio strategy gets a lot easier with the help of data and insights.

For starters, canvass the audio landscape. Listen to the ads of your competitors and peers to understand the moves they are making. Are they advertising on both streaming audio and podcasts? What do their ads sound like, and what are their call-to-actions? Are they utilising skills for smart speakers? Are they using well-known voiceover talent? Understanding this information (and how well it's working) will provide you with a competitive advantage and allow you to make more informed decisions for your own audio assets.

Next, test your creative. You wouldn't purchase a car without driving it first, correct? We believe that audio creative should be thought of in the same manner. Whether you are repurposing existing creative or have newly-created adverts, test them first via a predictive scoring system or through more in-depth human panel test before you put them into the market. For example, compare Jo Brand's voice to Alexa and ask your audience what they think.

Last, measure your lift! In the spirit of continuously optimising your audio adverts and evolving your strategy, knowledge is power. By running brand lift studies around your audio campaigns, you are able to better understand the impact of your audio creative by measuring key metrics such as brand awareness, favourability, and purchase intent - what is the impact of the voice you use - voice actor, celebrity, synthetic?

Voice ads and voice commerce will only continue to grow - transactions with **smart home devices are predicted to grow to \$164 billion worldwide by 2025**, up from **\$22 billion in 2020**¹⁰.

Not only is now the time to adopt voice as a key area of your marketing strategy, it is the time to ensure you are using voice in the most optimal way in order to drive revenue and increase loyalty from your customers.

\$164B

smart home device growth by 2025



Contributors.



Octave Audio is a targeted audio advertising platform and joint venture of News UK's Wireless and Bauer Media.

Advertisers are able to reach the audiences of live radio broadcasts including talkSPORT, KISS, Absolute Radio, Virgin Radio, Magic Radio, Hits and Greatest Hits Radio as well as podcasts. Octave uses Bauer Media's and News UK's News IQ audience insights to identify engaged and quality listeners based on behaviour, emotion, opinion and habits for precise targeting.

sales@octaveip.com



Launched in 2018, Say It Now is a voice marketing and commerce business with a unique product set in a rapidly growing sector.

Say It Now's trademarked Actionable Audio Ads® allow brands to create audio campaigns that listeners can engage directly with – by requesting more information about a product or service, or by purchasing directly through simple voice commands on their smart speakers. As well as listing Diageo as a cornerstone client, Say It Now has secured media partnerships with Global, the media and entertainment group, and Octave Audio, strategic relationships with Hawk, and has been selected as one of four companies for the Havas Startup Program in 2021. Say It Now partnered with Bayer for an industry first interactive smart speaker advert with listeners to Global radio stations able to order a Berocca Boost by talking to their Amazon device during the commercial breaks.

In 2021 Say It Now acquired GetStarted – a North American voice technology platform – to accelerate its strategic growth and consolidate its market leading position.

Say It Now won the UK and European rounds of Amazon's Alexa Cup competition and achieved the bronze medal in the global final held at the end of July 2019.

info@sayitnow.ai



Veritonic is the industry's leading competitive, testing, and performance solution for audio. Our technology provides brands, publishers, and agencies with the data they need to optimize their omni-channel audio investments across podcasts, streaming audio, broadcast radio, audiobooks, video, and more. With competitive intelligence, creative testing, campaign performance and brand lift capabilities an one easy-to-use UI, the Veritonic platform is the most comprehensive solution for audio optimization and efficacy. Powered by our proprietary "Machine Listening and Learning"™ technology, the Veritonic platform also scores and benchmark audio assets, helping world-renowned companies put their best creative forward to cultivate deeper relationships with listeners and increase their return.

veritonic.com

Thank you

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Navraj Gata-Aura. Damian Scragg.