Hallam
Thrive online

Whitepaper

Voice & visual search:

How to reach your customers in the evolving search landscape

hallam.co.uk

Contents

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1.

Foreword by Hallam

The search industry is in a constant state of change, and that rate of change is accelerating.

One significant area of development is the change from searching via the keyboard to using other forms of input, and in particular using voice input and searching by image match.

Growth in the use of voice and visual search is growing exponentially, but the awareness and understanding these opportunities offer to search marketers is lagging.

We're operating in an evermore competitive search marketing landscape. Those who are able to adapt quickly to changing search habits and diversify their efforts across emerging networks stand to gain a competitive advantage now and in the longer term.

I'm hugely excited about the opportunities presented by emerging voice and visual search technology and I hope that you will put the information in this paper to use in order to better reach your customers.

Ben Wood
Digital Director

1.1. About Hallam

Hallam is a full service digital agency helping businesses and brands to thrive in a digital world.

Hallam's core values "Think. Act. Improve." drive campaigns for clients like the United Nations, Speedo and Suzuki who want to get found, to grow their business, and to stay connected.

Hallam's expertise has been recognised by multiple award wins over the past few years. Hallam is the 2018 winner of the The Drum's 'Grand Prix' award for the most recommended agency in the UK (40-100 staff) along with wins at Google's own Premier Partner Awards for EMEA (Europe, Middle East and Africa), Hallam has a growing trophy cabinet of industry awards celebrating successful digital campaigns.

Established in 1999, Hallam started out as an SEO agency, now operating from offices in Nottingham and London boasting an experienced team of 60 digital marketing specialists who deliver web design and development, PPC, social media, digital PR, ecommerce, email marketing, conversion rate optimisation and content marketing services.

PREMIER **Google** Partner

Grand Prix Winner:
Agency of the year
Winner 2018

The Drum
Recommended
Digital Agency
Awards

1.2. About the author

Ben Wood is Hallam's Digital Director, leading a team of more than 40 digital professionals.

Ben Wood
Digital Director

Ben joined Hallam in 2012, and has played an instrumental role in the growth and success of our company. He has delivered some outstanding results for our clients, and in 2018 was shortlisted for the Chartered Institute of Marketing (CIM) "Marketer of the Year".

Ben was invited to speak at the prestigious SMX West 2018 conference in California, where he shared his experience in Advanced Audience Targeting & Management Tactics.

He is a highly respected author, and writes regularly for The Journal of Social Media Marketing, Search Engine Journal and State of Digital.

1.3. Executive summary

Over the next five years, search will undergo a momentous shift.

This is around how people interact and manage relationships with other people, businesses and artificial intelligence due to increased trust being placed in virtual assistants and improving visual search technology. The key to unlocking the power of voice and visual search is convenience. The brands and tools solving problems will be those who profit. In search, we're already seeing consumer expectations migrating from links to answers.

Virtual assistants will continue to evolve from answers to actions. They will build awareness of individual context to deliver more accurate information and services based on voice and visual inputs.

In 2020 consumer intent and technology will power user experience and the advertising models of the future. Brands could move spend from text ads to voice ads, and from investing in clicks to answers and actions.

Structuring data for a growing number of informational queries will be a logical evolution of SEO. Meanwhile, paid search could be defined by intense competition for a decreasing number of advertising opportunities.

Consumer appetite for solutions will grow as more problem solving applications are built to address demand. "Search" will expand as we expect virtual assistants to figure out the best answer or action to take on our behalf.

2.

The rise of voice search

In 2017, there were 33 million voice search enabled devices in circulation, with 40% of adults using them everyday[1].

For many individuals, the use of voice search is now an everyday occurrence. With voice activated applications like Siri, Google Assistant and Cortana, virtually any smartphone user can ask their phone a question or set it a task. This has also extended to the home, with the likes of Amazon Echo, Google Home and Apple's HomePod installed in millions of homes across the world.

Voice search can often be mobile and locally focused and embedded into mobile apps and devices, for example location based searching.

And voice search can also be functionally focused, with digital assistants are integrating into products that are part of everyday life both at work and at home including searching for "how to" information, or controlling

By 2020, Gartner predicts that 30% of all searches will take place without a screen altogether, meaning voice or image search[2] and ComScore predicts by 2020 that, 50% of all searches will be via voice[3].

The voice recognition market is set to be worth $601 million by 2019(4); and it's crucial for brands to recognise if they don't start planning a strategy to capitalise on this emerging tech soon, they risk losing out on search growth potential in the long term.

This, coupled with growth in visual search capabilities on native apps and platforms such as Pinterest, Bing and Google search, is directly influencing search behaviour and changing the search marketing landscape as we know it.

Google trends imply queries associated with voice related commands have risen 35x since 2008 after launch of the iPhone and Google voice search

Source: KPCB
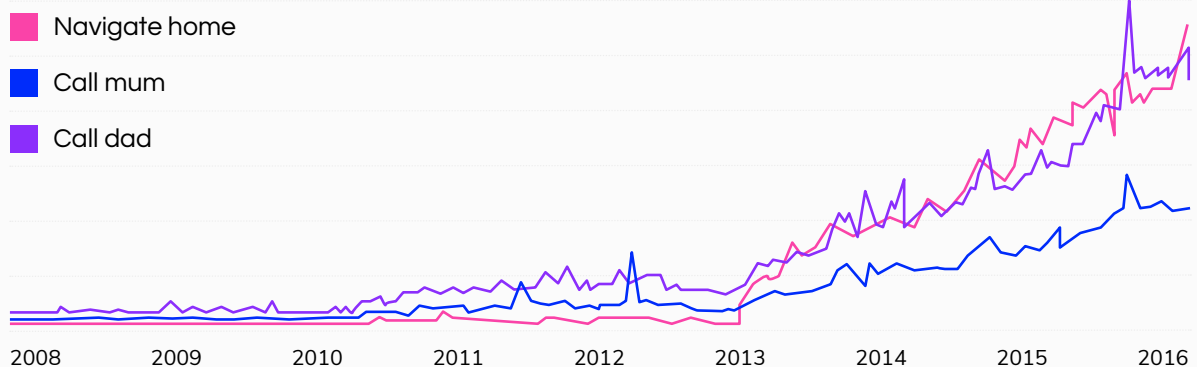
2.1. How users are engaging with voice search

Over the last couple of years, voice search has become a part of the daily routine of millions of digital users. Naturally, the way in which we approach voice search will be vastly different to that of text based searches.
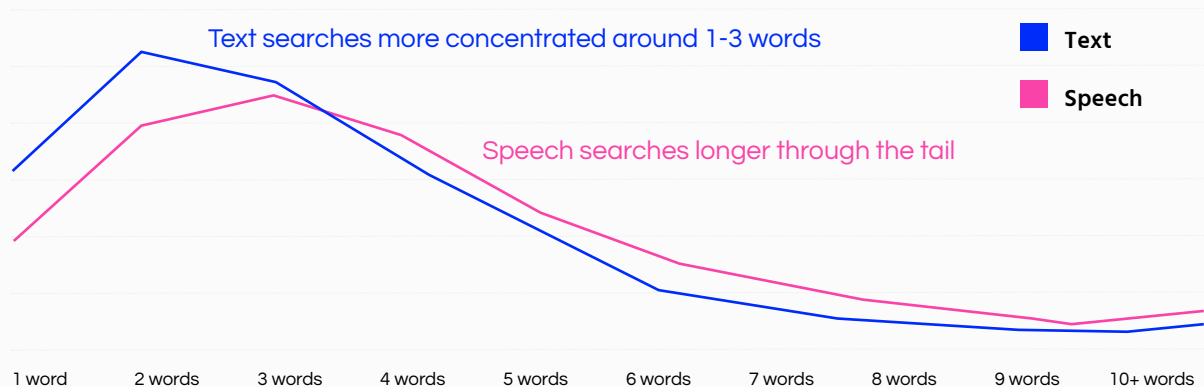
With 41% of people agreeing they talk to voice assistants as if they were a friend(5), it's clear the way we approach voice search drastically differs in behaviour in comparison to manual searches.

For example, if a searcher is typing a search for places to buy pizza, they might input "Best Pizza in London." However, using voice search,

users tend to automatically become more conversational and instead ask a question such as "Where can I get the best pizza in London?" or "Where are the closest pizza restaurants to me?".

One difference in voice search query behaviour is that the query string tends to be longer than keyboard written text queries.

Voice search queries are longer than text queries

Text searches more concentrated around 1-3 words

Speech searches longer through the tail

Text
Speech

1 word   2 words   3 words   4 words   5 words   6 words   7 words   8 words   9 words   10+ words

Source: Search Engine Land

What's also interesting is how intelligent voice assistants are becoming when answering search queries and how they're able to action certain requests on your behalf based on the nature of your query.. For example, at the recent Google I/O conference, Google Assistant showcased a very natural-sounding voice service that can now make phone call appointments and reservations as the next logical step to a voice query.

Technology is now at a point where virtual assistants can handle a backand- forth Q&A when calling a business. Google Duplex is a new technology for conducting natural conversations to carry out "real world" tasks over the phone. These virtual assistants will soon be able to bridge the gap between the need to complete business related tasks and making the ad hoc request by voice at the moment the service is required.

So, what does the rising adoption and these emerging trends in voice assistant technology mean for search marketers?

Let's now take a look at how brands can leverage voice search to their advantage.
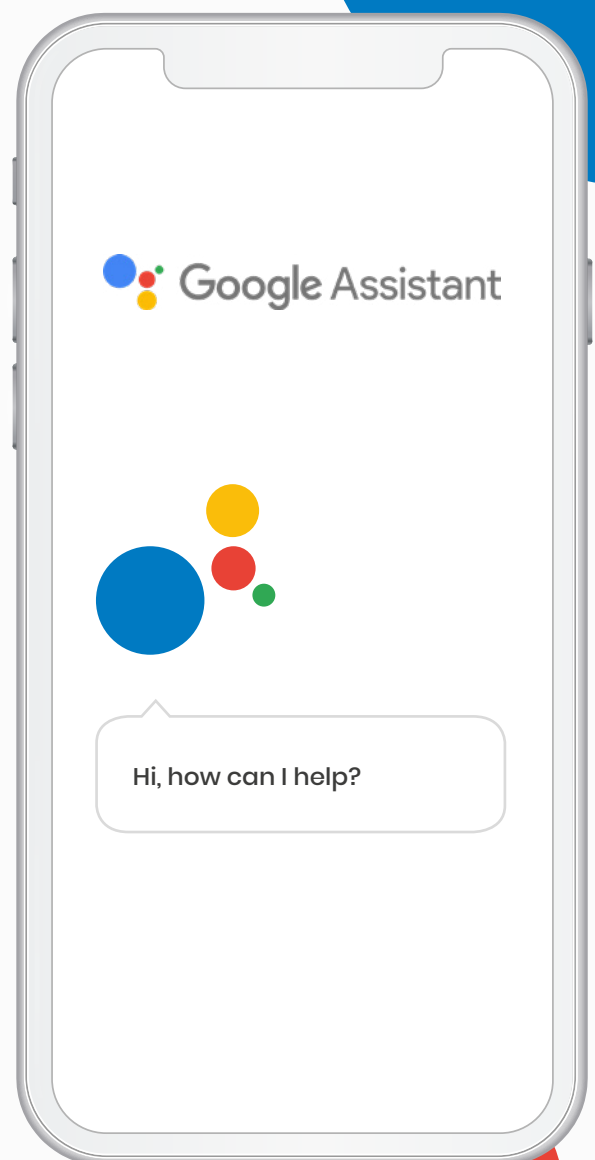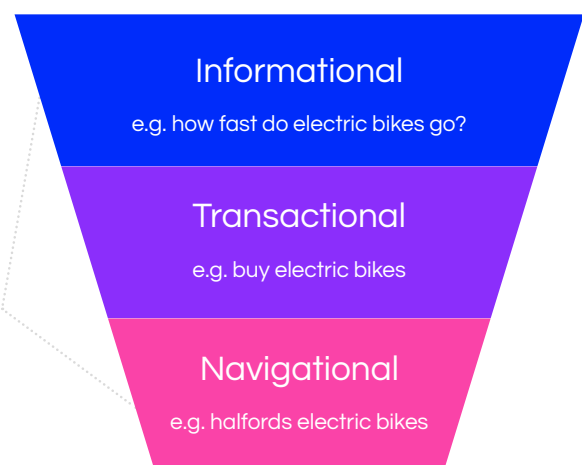
2.2. Five ways brands can leverage voice search

In 2017 users asked "How to" more than anything other type of query on their voice assistants, Brands and businesses need to create "how to" content in a format that search engines understand, and key to that understanding is Schema Markup.

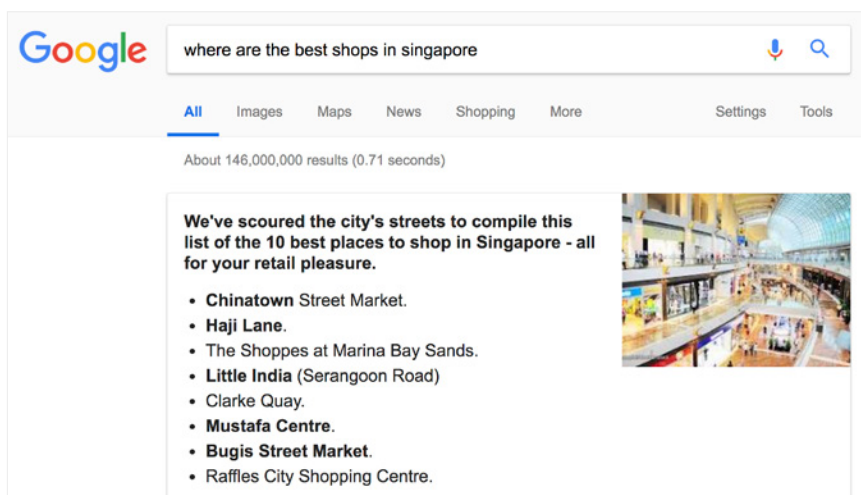### 1. Identify customers' informational queries and qim for featured snippets

The types of search queries most commonly used to begin voice search requests are likely to be informational, meaning a looking for the answer to a specific question.

Most used query types on voice search

Informational

e.g. how fast do electric bikes go?

Transactional

e.g. buy electric bikes

Navigational

e.g. halfords electric bikes

Source: Hallam

Up to 80% of these informational voice queries are answered by Google Assistant with a [featured snippet](#)[6]. A featured snippet, also known as "position zero" is an extract from a web page that answers the user's query, and can often take the form of a brief paragraph of text, a list of facts, or a table of information.

Source: Hallam

The opportunity for brand is to generate content that answers customers' informational queries that will be selected by voice assistants as the answer to the question.

There are a number of tactics for generating content suitable for being selected for featured snippets and the elusive "position zero;"

Identify and answer relevant questions:

Try tools like [Answer the Public](#) to research the questions commonly searched for that are related to your industry, and get visual representation of categories of questions. Use this query data to shape your content generation to answer customer queries

Be concise: Ensure the sentences answering the query are short and concise and avoid rambling discursive content.

Write conversationally: Don't forget that voice search queries are more conversational compared to written queries. Always aim to create content using conversational language to appeal to these searchers.

Placement of the answer: Google representatives have advised answering the question early in a document, paragraph, or sentence.

Source: Answer the Public

2. Structured data: "how to" and speakable schema

In 2017 users asked "How to" more than anything other type of query on their voice assistants, Brands and businesses need to create "how to" content in a format that search engines understand, and key to that understanding is Schema Markup.

Schema markup is, quite simply, code you put on your website content that contains specifically structured vocabulary that adds additional meaning to the content.

Marking up website content with HowTo schema would provide search engines (and virtual assistants) with clear instructions to 'how' queries, meaning pages using this kind of markup will be more likely to be returned for these types of queries.

Speakable schema is currently 'pending' but is intended for future use to mark up 'speaksable' areas of a web page that would be eligible to be returned via voice search. It is another element of the schema.org vocabulary that webmasters and marketers will need to keep a close eye on over the next couple of years.

Structured data makes it much easier for Google and other search engines to understand your website content - so implementing it for any content you'd like to be returned for voice search queries will make a significant difference in your visibility in the voice search results.

3. Clean up your local SEO

39% of voice search users are looking for business information. And voice searches taking place on a mobile device are three times more likely to be looking for local business information compared to desktop users[7].
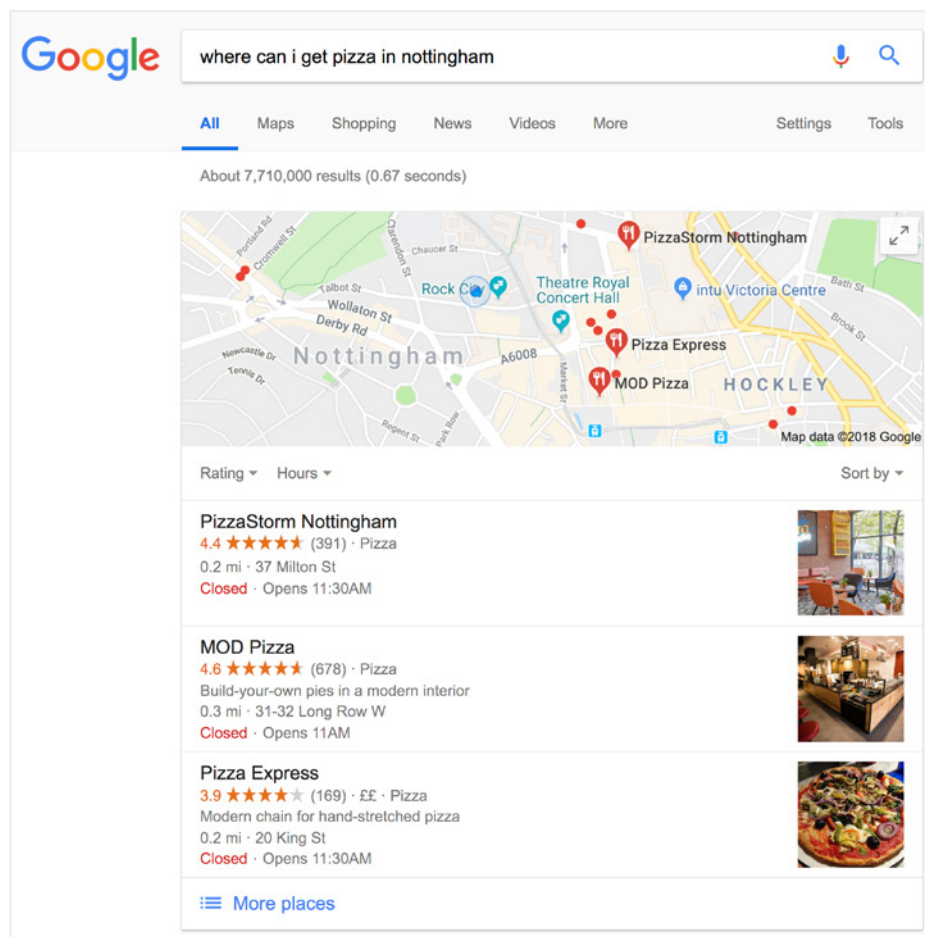
One key element to your rankings for local searches in the information your business provides in its [Google My Business directory](#) listing. Providing comprehensive, accurate and up to date information is key to being visible for local searches.

You should also carry out a thorough audit of how your business name, address, and phone number appear in listings across the web. If you have different NAP (name, address, phone) data listed, Google will have less confidence in your business and you won't rank as well locally or in Google's local pack Of course, there are many more elements that are important for [local SEO](#) but the best place to start is cleaning up local citations and Google My Business listing data to ensure consistency across the web.

4. Focus on page speed

Voice searches are predominantly carried out on mobile devices, and with Google recently making the move to a mobile-first index, implementing a [mobile search strategy](#) will increase your visibility in the mobile search results.

One element of your mobile strategy how quickly your web pages load, and page load speed is a key ranking signal.

Speed is important for ranking, but it is also important for user experience.

Google have found that bounce rates on mobile devices are 9.56% higher than on desktops[8] - meaning users are likely to be on-the-move, and will not spend their time waiting for pages to load, especially if it's costing them their data allowance.

To check whether your website is up to scratch, run your site through Google's Mobile [Friendly Test](#) and [Google's PageSpeed](#) Insights. This will provide you with a list of recommendations to make your site perform better on mobile, meaning you'll be in better shape to be returned for voice search queries.

5. Prepare for the new voice ads opportunity

With talks of Amazon approaching brands about implementing ads on their Echo device[9], could we soon start seeing paid media opportunities as a way to monetise voice assistant technology in the future?

Although Google doesn't currently offer paid opportunities on their voice assistants, a company spokesperson recently stated they are "looking at ways to create a business model that will provide a great user experience."

Taking the term "brand voice" literally, one change the search advertising landscape will be sure to see over the next few years is brands looking to create identities for when consumers can't see the products, such as developing a unique and instantly recognisable "voice" when announced on voice assistant devices.

In order to get a head start, Alexa's Skills and Google's Actions (apps for Google Home and Alexa) provide brands with an opportunity to explore the space to be better prepared as voice marketing expands over the coming years.
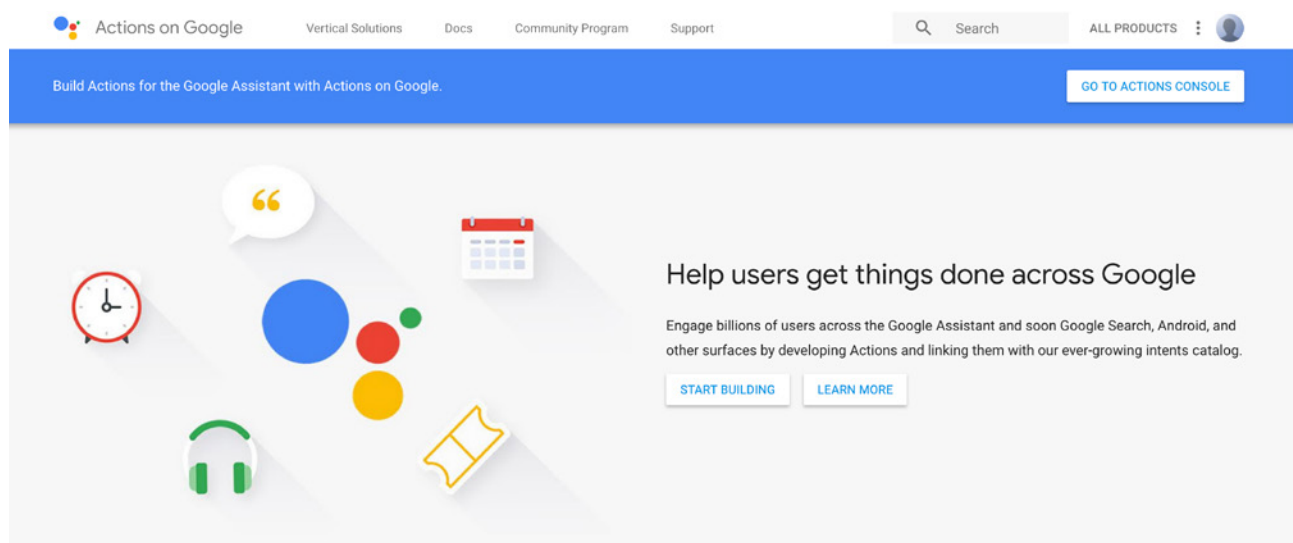
Source: Google

It's also worth noting that the future of shopping (and voice advertising) won't be completely blind. Amazon recently debuted its Echo Show—an Alexa-powered 7-inch screen, while Google has recently released its own competitive product, Google Smart Display.

2.3. Examples of brands leveraging voice search

Some brands are already leveraging the capabilities of voice search to boost brand engagement and sales using Alexa Skills and Google Actions.

Tide

Tide's Stain Remover Alexa app provides users with advice on how to remove a variety of stains and marks.

Source: Amazon

Tide - Stain Remover
by P&G Productions
★★★☆☆ 26
Free to Enable

"Alexa, open Tide." | "Alexa, tell Tide I have a juice stain." | "Alexa, ask Tide how to clean a grass stain."

Campbell Kitchen

Campbell's Kitchen reads out recipes and guides the cooking process by reading out instructions.

Source: Amazon

Campbell's Kitchen
by Campbell's Kitchen
Rated: Guidance Suggested
★★☆☆☆ 27
Free to Enable

"Alexa, open Campbell's Kitchen" | "Alexa, ask Campbell's Kitchen what's for dinner" | "Alexa, ask Campbell's Kitchen for easy chicken dinners"

Toyota

Toyota has just launched a 'skill' enabling users to start their cars via voice command.

Source: Amazon

Toyota
by Toyota Motors North America, Inc.
Rated: Guidance Suggested
★★★★☆ 5
Free to Enable

"Alexa, ask Toyota to start my car." | "Alexa, ask Toyota how much gas I have." | "Alexa, ask Toyota to lock my doors."

Uber

Uber have developed apps across both Google (Action) and Amazon (Skill) to offer users the ability to book an Uber via both Alexa and Google Home.

Uber
by Uber Technologies, Inc.
Rated: Guidance Suggested
★★☆☆☆ 212
Free to Enable

"Alexa, ask Uber to request a ride." | "Alexa, ask Uber to call me an Uber X from work." | "Alexa, ask Uber to change my default pickup location."

Shown in: English (US) : See all supported languages

This allows users to request a ride and receive real-time updates by simply making a voice request.
Source: Amazon

Ted Baker

Ted Baker recently partnered with Google Voice Search in a promotion at specific Ted Baker locations.

The window displays had key phrases on them which when activated via Google voice search, unlocked incentives. This is a great example of voice search being used as a central component of a marketing effort.

Source: @ted_baker Twitter

3.

The rise of visual search

While voice search has been increasing in usage over the last couple of years, so has visual search.

Over 75% of consumers are reportedly inspired to make purchases based on image and video content(10), according to new research from ViSenze — a statistic that highlights the growing importance of image-based search for marketers.

A 2017 report by Jumpshot & Moz further supports that discovery through pictures is alive and well, with around 27% of all searches

across 10 major properties being for images. Furthermore, Pinterest have seen an 140% year on year growth following the February 2017 launch of its Lens visual search functionality(11).

Monthly Pinterest visual lens searches

+140%

250 million — Feb 17

600 million — Feb 18
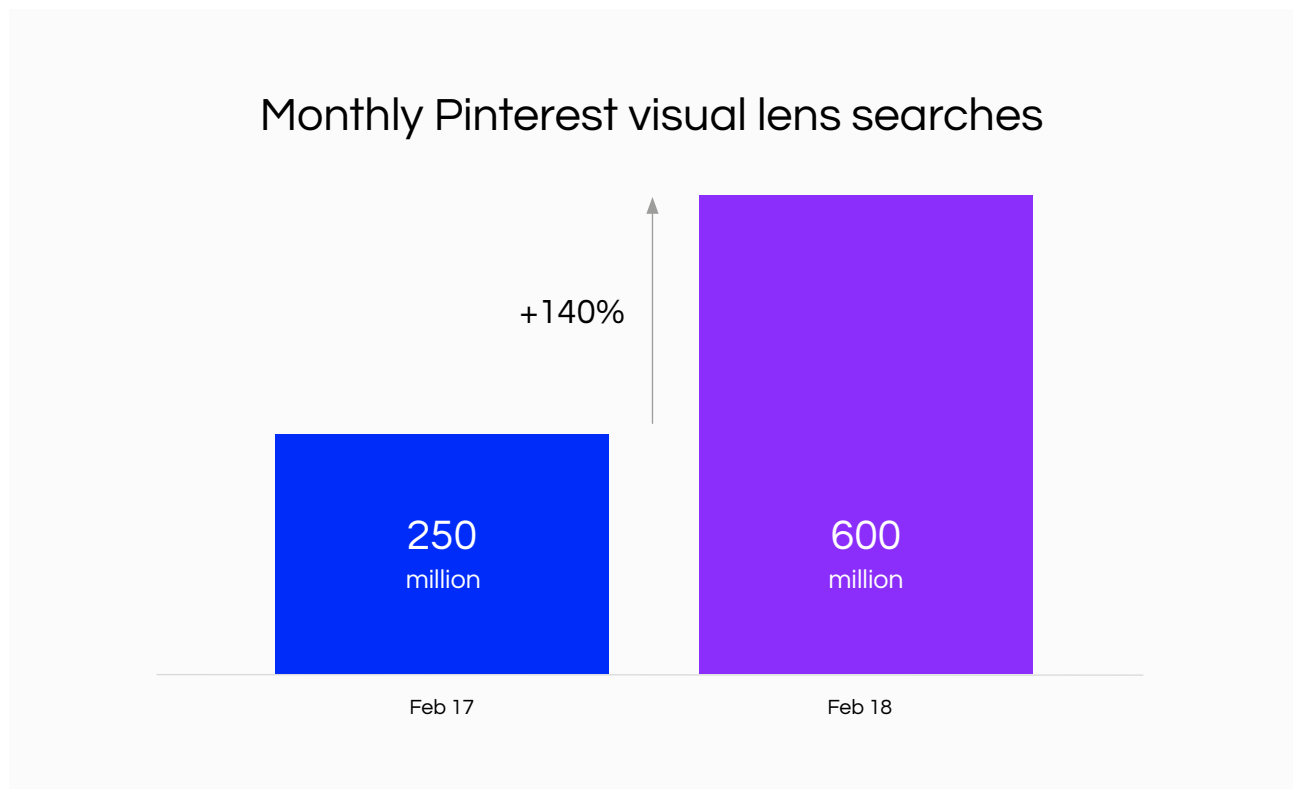
We now have an evermore impressive range of visual search methods available to us: we can search with images, search part of an image, search with our cameras and via augmented reality.

This combined with a rising number of visual search applications for ecommerce means visual search is now a powerful tool with huge future potential for retailers.

It's not tough to understand why visual search could continue to grow in popularity. Visual search presents an incredibly useful tool for shoppers who are looking for a specific item but aren't yet sure how to find it through regular search. Visual search reduces the amount of steps the user would otherwise have to go through, such as typing in a keyword or scrolling through results to find an item they may have just seen.

There are already more images and videos being returned as SERP features by Google each year. And that is only going to continue to grow.
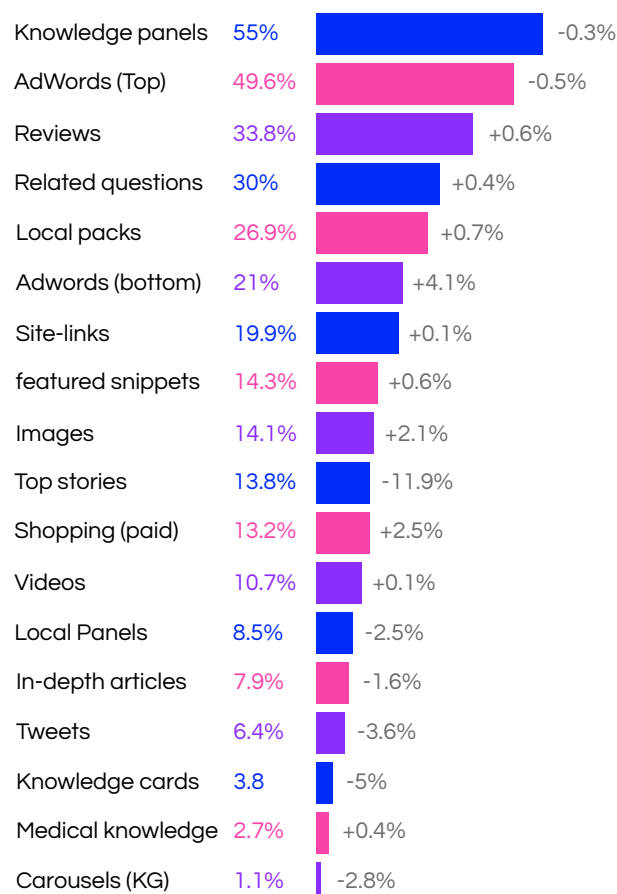
It's clear that visual search is growing rapidly, now let's explore how people are using it, what visual search technology is capable of and how it might develop in the future.

Feature	%	Change
Knowledge panels	55%	-0.3%
AdWords (Top)	49.6%	-0.5%
Reviews	33.8%	+0.6%
Related questions	30%	+0.4%
Local packs	26.9%	+0.7%
Adwords (bottom)	21%	+4.1%
Site-links	19.9%	+0.1%
featured snippets	14.3%	+0.6%
Images	14.1%	+2.1%
Top stories	13.8%	-11.9%
Shopping (paid)	13.2%	+2.5%
Videos	10.7%	+0.1%
Local Panels	8.5%	-2.5%
In-depth articles	7.9%	-1.6%
Tweets	6.4%	-3.6%
Knowledge cards	3.8	-5%
Medical knowledge	2.7%	+0.4%
Carousels (KG)	1.1%	-2.8%

% of queries returning each Google SERP feature
Source: Smart Insights. Comparison 2017 vs. 2016

3.1 How users are engaging with visual search

To get an idea of how people are searching images and the most popular types of search, we need look no further than Pinterest Lens (visual search technology) top search data from 2017:

Based on these usage statistics, brands operating in the fashion and home decor industries have the biggest opportunity to capitalise on image search right now.

It's no surprise then that fashion brands such as ASOS are already using image search to their advantage by implementing proprietary technology, allowing shoppers to snap an item they like in a shop and find similar items on Asos.com.

Position	Search categories	Trending searches
1	Fashion	Tattoos
2	Home decor	Nails
3	Art	Sunglasses
4	Food	Jeans
5	Products	Cats
6	Animals	Wedding dresses
7	Outfits	Plants
8	Beauty	Quilts
9	Vehicles	Brownies
10	travel	Natural hair

Source: Pinterest
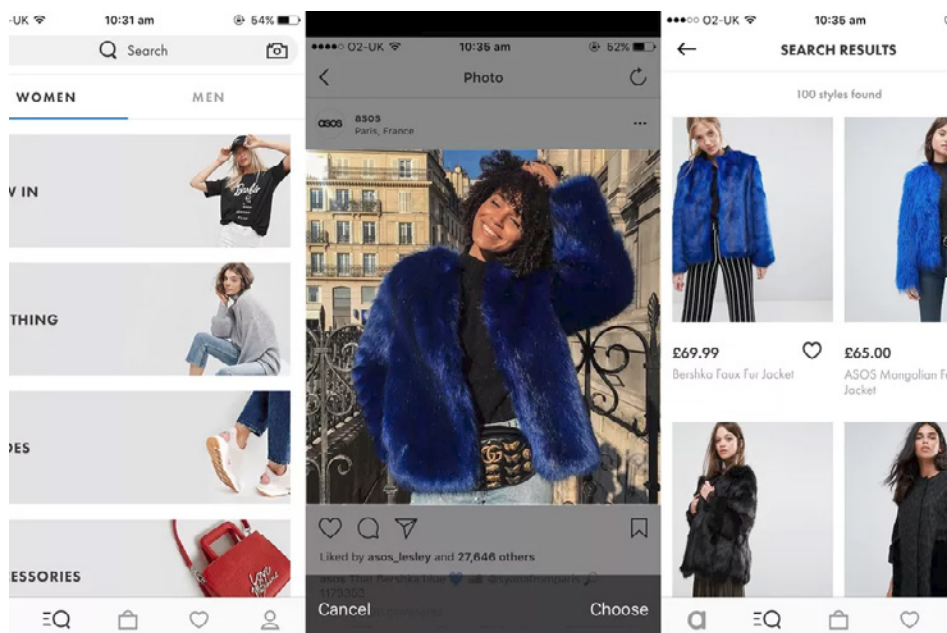
Source: The Verge

Let's take a look at a few of the most prominent platforms that are enabling image search and how brands are utilising them for visual search.

Pinterest

For Pinterest, accurate visual search is a primary business focus.

Pinterest has allowed users to highlight a specific part of a Pin and find other Pins that are visually similar to the highlighted area since 2014, ahead of Bing, who only introduced that functionality to its mobile image search in July 2016.

More importantly, Pinterest have since rolled out a search function that aims to match discovery to images, not words. Pinterest Lens "lets you use" the camera in your Pinterest app to discover ideas inspired by objects you see out in the real world," the company said.

Pinterest Lens is growing as an advertising platform and the technology is now also being sold to other brands for use in their own apps and websites! A recent report showed that 90% of weekly Pinterest users use the platform to make purchase decisions[12], and 78% of Pinners say content from brands on the platform is helpful[13].

With Shop the Look Pins, for example, people can find and buy products within fashion and home décor Pins by selecting specific parts of the image and 'shopping the look'.

Unlike Google, Pinterest is able to focus all its effort on the development and monetisation of its visual search engine which is why they're quickly becoming the leading name in visual search technology.

Source: Pinterest
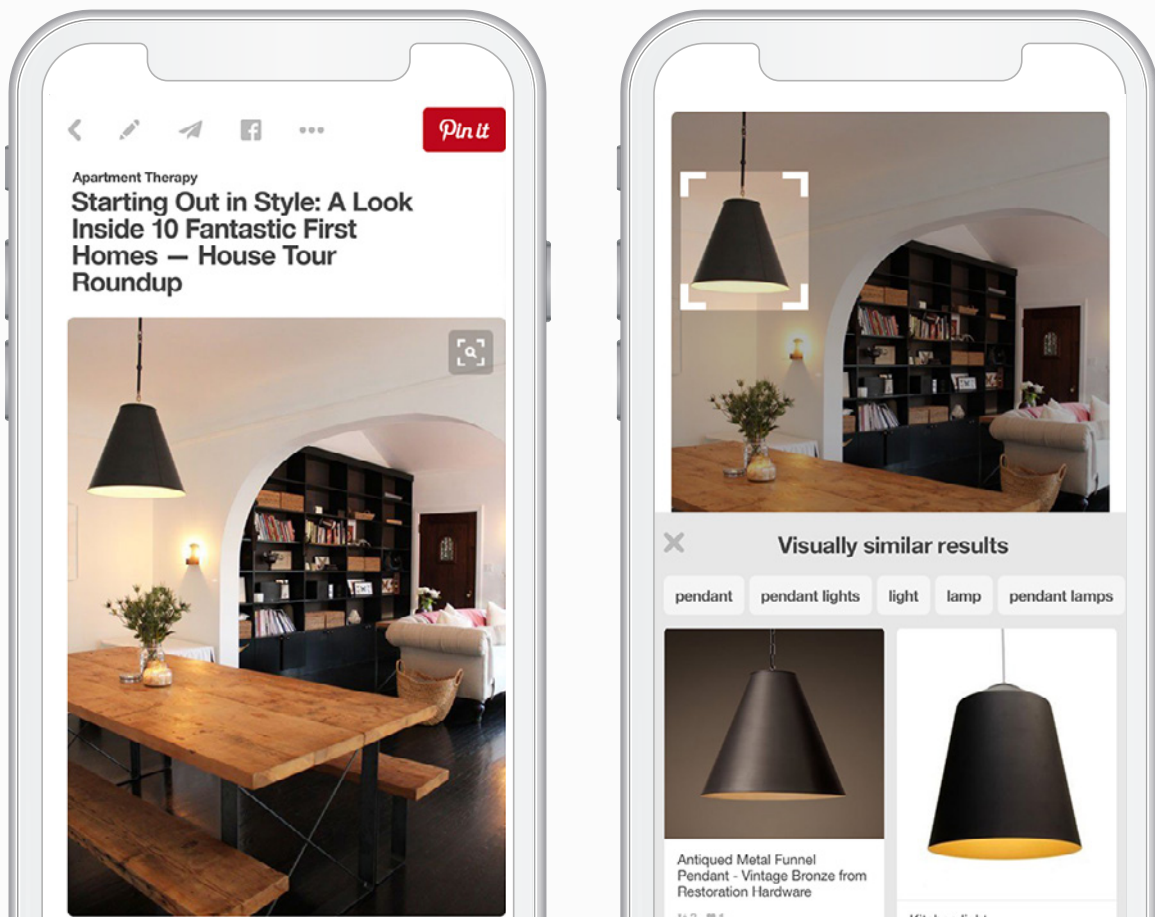
Bing

Bing have developed extremely similar image search technology to Pinterest, offering smart web-based image search and image search based on images taken by your camera.

Bing visual search is a useful tool that has significantly enhanced their image search product over the past couple of years compared to Google's current offering.

For example, below is a Bing search for "kitchen decor ideas", which showcases Bing's visual search capabilities within their image results:
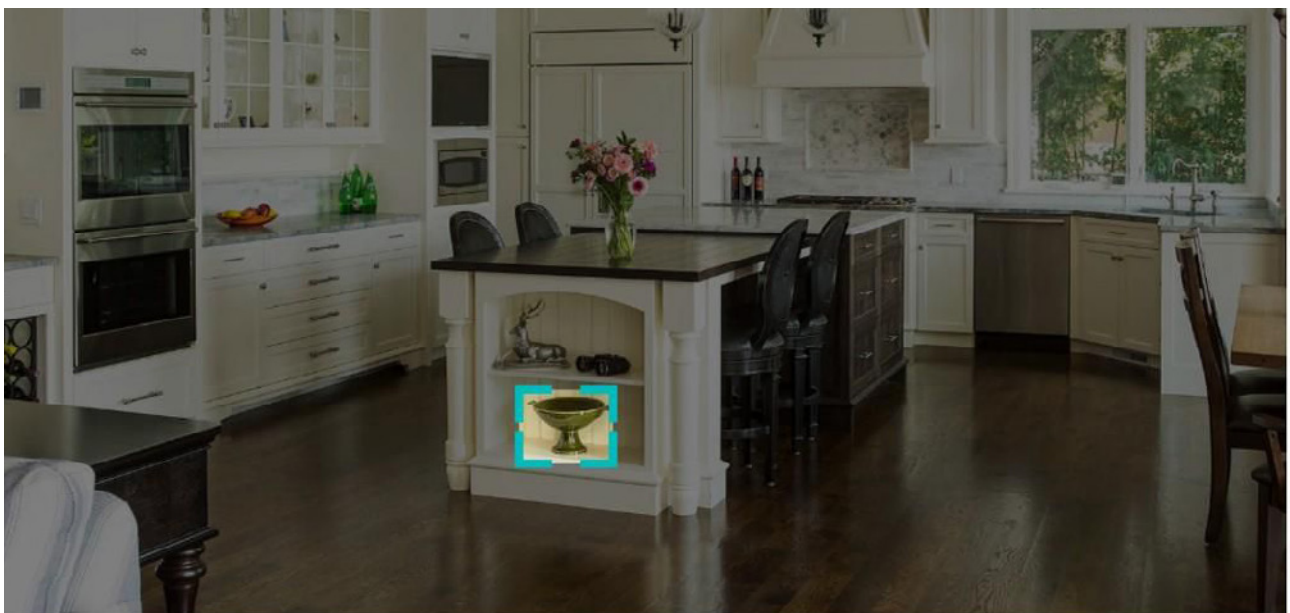
Source: Bing

Bing now give users the ability to search within images by narrowing in on a specific item and then searching for related objects.

Google

Google has also recently made a series of moves designed to make their image search simpler and more accessible, including the release of their own camerabased search (Google Lens).

The search giant is now focusing a lot of their efforts on how to further monetise their image results.

Having run Shopping ads in their image results since 2016, Google have launched additional features such as style ideas and 'shop the look' advertising in 2016.

With these aspects of image search aimed at enhancing fashion shopper experience, Google is also offering a way for retailers to take advantage of the additional assistance with an expanded carousel for "similar items" while searching for clothing products.

In the same vein, Google have updated their app and mobile results to include badges for image search. Now, in searches made within the app, users can see a badge in the bottom left hand corner of an image. For example, badges such as "recipe" or perhaps the most significant badge "product" – shown if the item is available for purchase online.

Source: Google

Ecommerce platforms

Google has also recently made a series of moves designed to make their image search simpler and more accessible, including the release of their own camerabased search (Google Lens).

Amazon visual search is aimed at capturing users who are visiting a physical store but checking and comparing prices online. Customers can use the camera icon to search for almost anything. For example, point the camera at a pair of shoes and the app will pull up a list of similar items.

Source: amazon
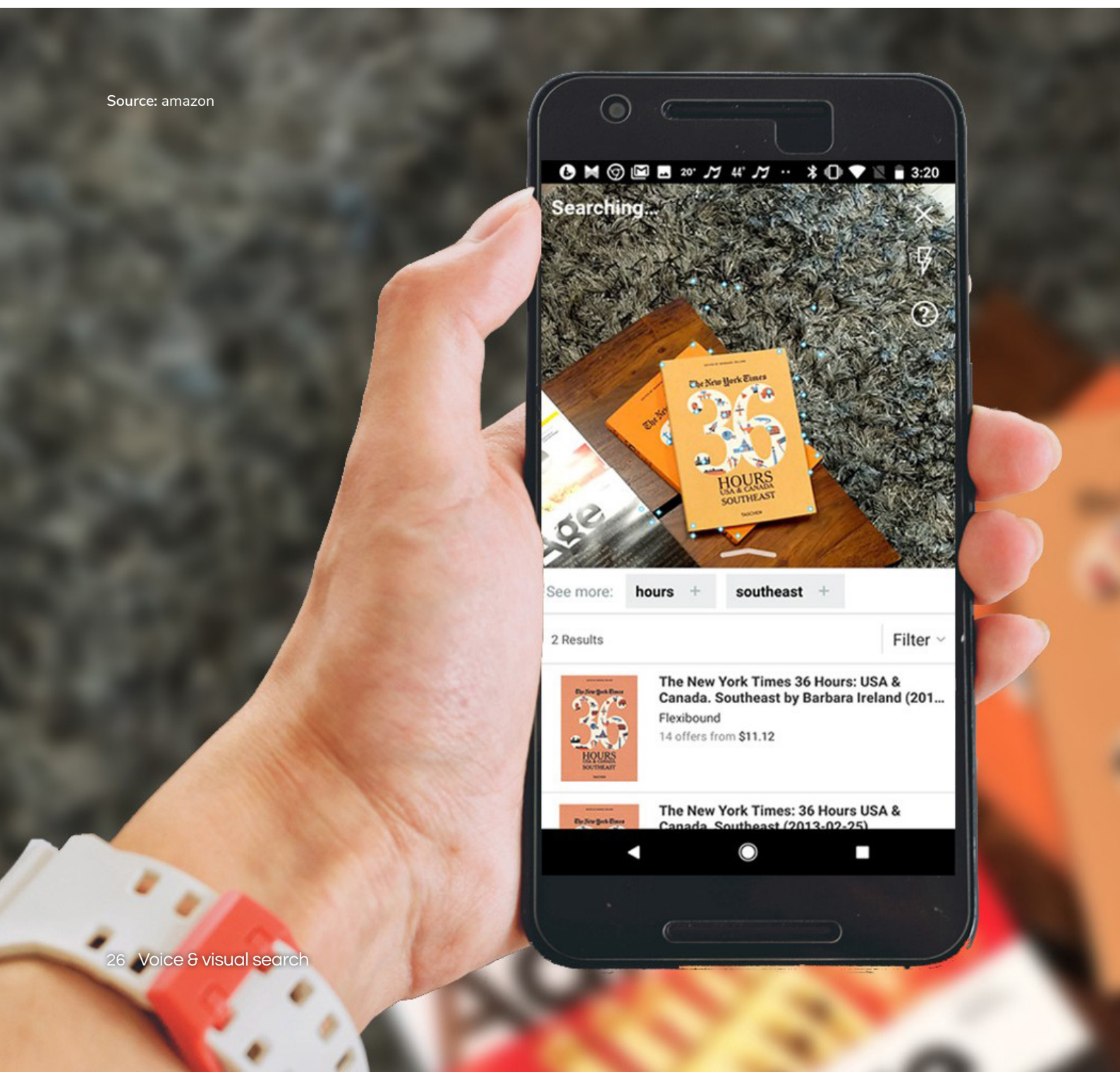
3.2. How brands can leverage visual search

Image search is a huge opportunity for brands, and there are a number of specific steps businesses and brands can take to leverage their visibility.

Focus on organic image visibility

One aspect of gaining traffic from visual search is your visual content ranking in the Image search engine results. A subset of the overarching search engine optimisation function is optimising for image search and businesses will need to create a strategy for prioritising and measuring the effectiveness of visual search campaigns.

Building image search into web inventory

Over the past year, Pinterest rolled out its visual search technology into USA retailer Target's apps and websites. As part of the deal, Target will reportedly increase ad spend with Pinterest and test new Pinterest ad formats[14].

We are now in a place where Pinterest is becoming a service to power some visual search for other products. Recent research from L2 found that only 8% of specialty retail brands have integrated a photo search capability into their apps[15], which is only set to increase in coming years.
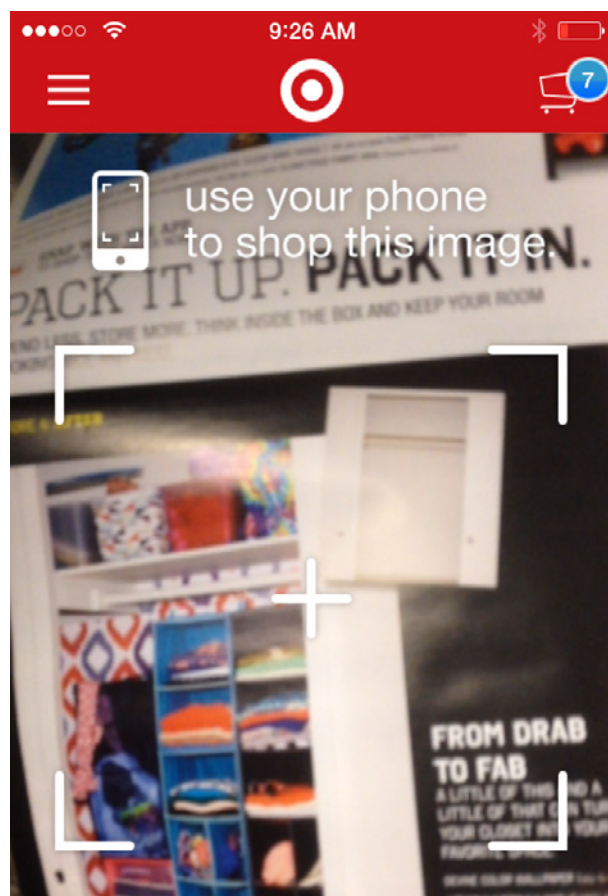
Source: Target
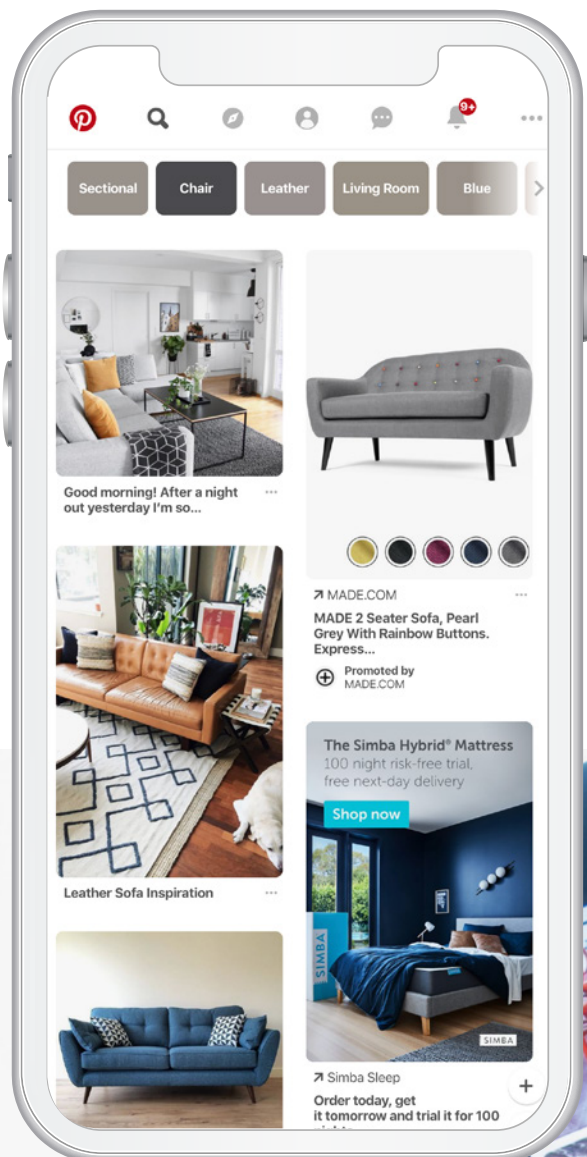
Advertising on Pinterest

61% of Pinterest users have discovered new brands or products from Promoted Pins[16], and half of Pinners have already made a purchase after seeing a Promoted Pin.

Pinterest advertisers will get the benefit of their ad showing up next to a product that is related to the ad based on its core visual search technology. In addition to promoted pins, ecommerce retailers have an opportunity to register interest in Pinterest shopping.
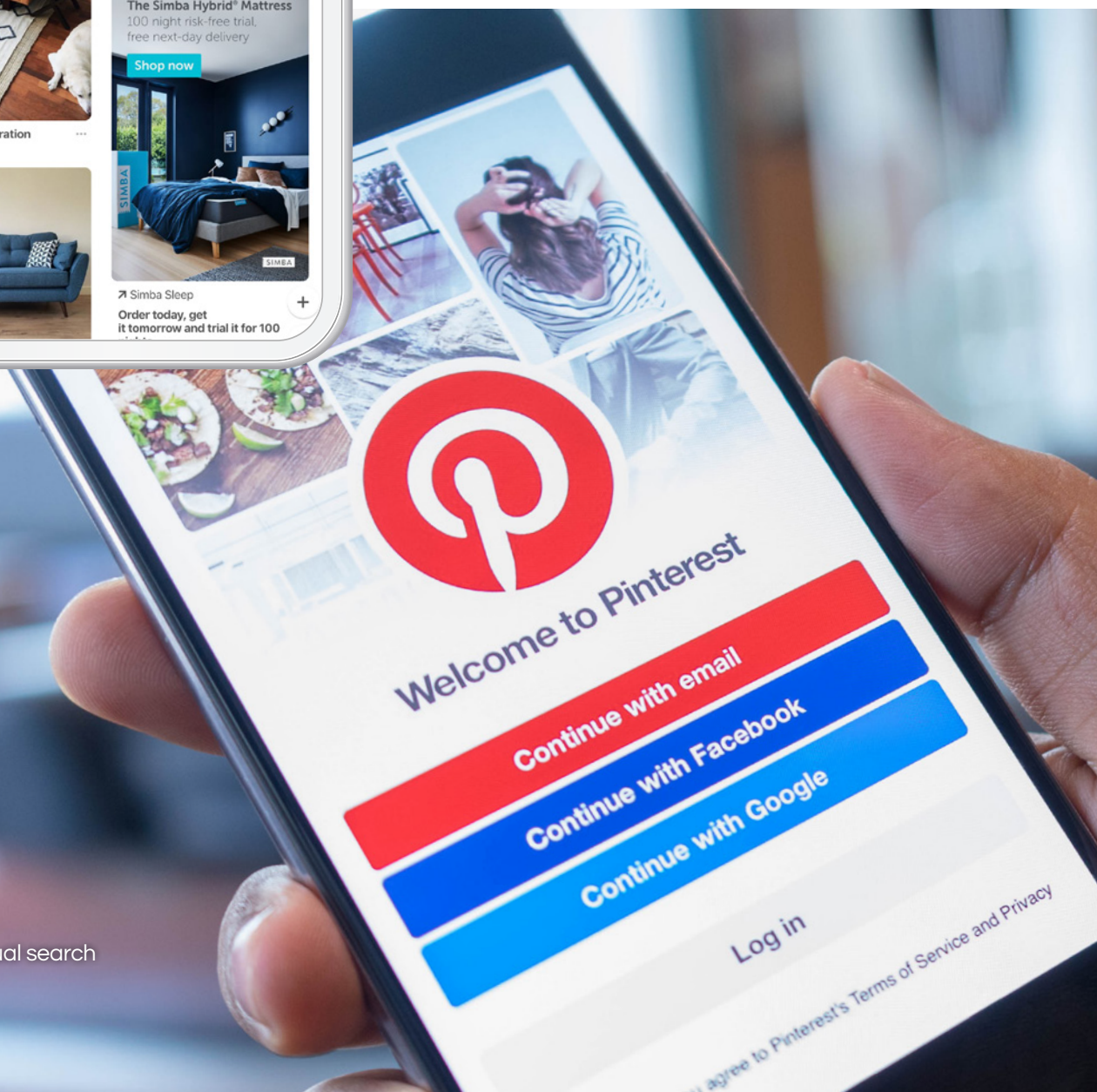
3.3 Examples of brands leveraging visual search

Some brands are already leveraging the capabilities of visual search to their advantage.

Target, who have an active partnership with Pinterest's Lens technology have clearly seen value in visual search, but which other brands have been investing in this technology?
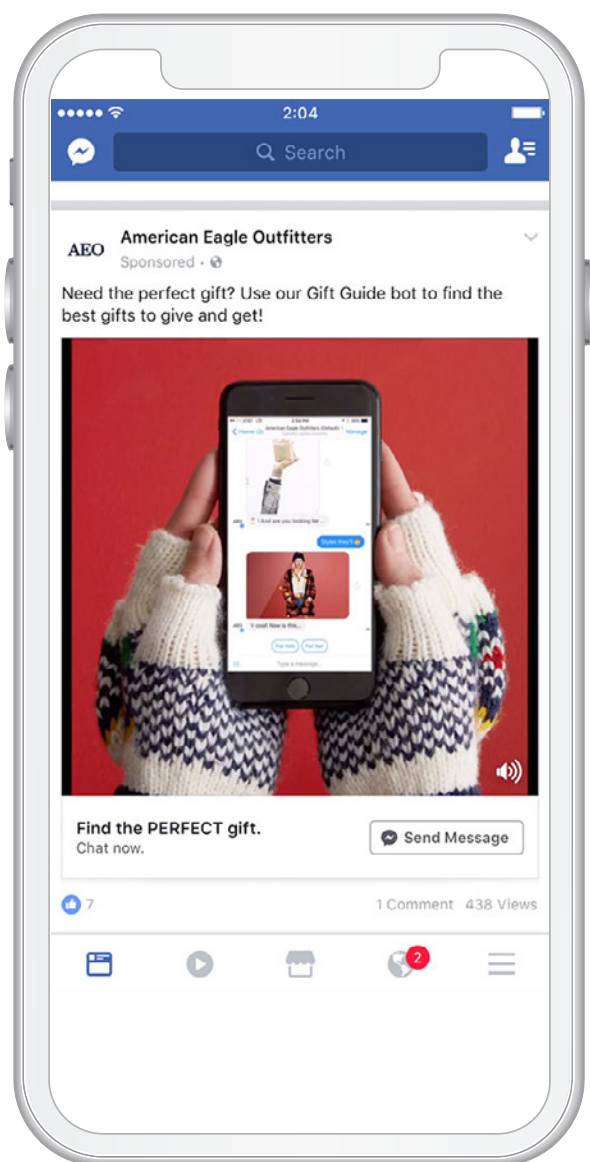
American Eagle

American Eagle have been investing heavily in chatbot technology which includes the ability to use visual search to query their product catalogue.

The company is developing an artificial intelligence feature that would allow customers to send the bot a photo of an article of clothing and then receive images of matching American Eagle Outfitters products in return—which they can then purchase directly through Facebook Messenger[17].

Tommy Hilfiger

Tommy Hilfiger launched their visual search app at Venice Beach fashion show in 2017 working in partnership with visual search tech company Slyce. Dubbed as the first app to feature 'runway recognition' technology[18], users were able to purchase the looks via the app as soon as they snapped the items on the catwalk.

B&Q

B&Q have been investing a lot of time and advertising spend on Pinterest and have utilised almost every ad feature available. Most searches for interior design inspiration will return eye catching B&Q advertisements which will no doubt be driving qualified traffic to their site.

B&Q have also recently written a co-branded piece with Pinterest on key interior trends that was published in the Independent, another sign of their close partnership.
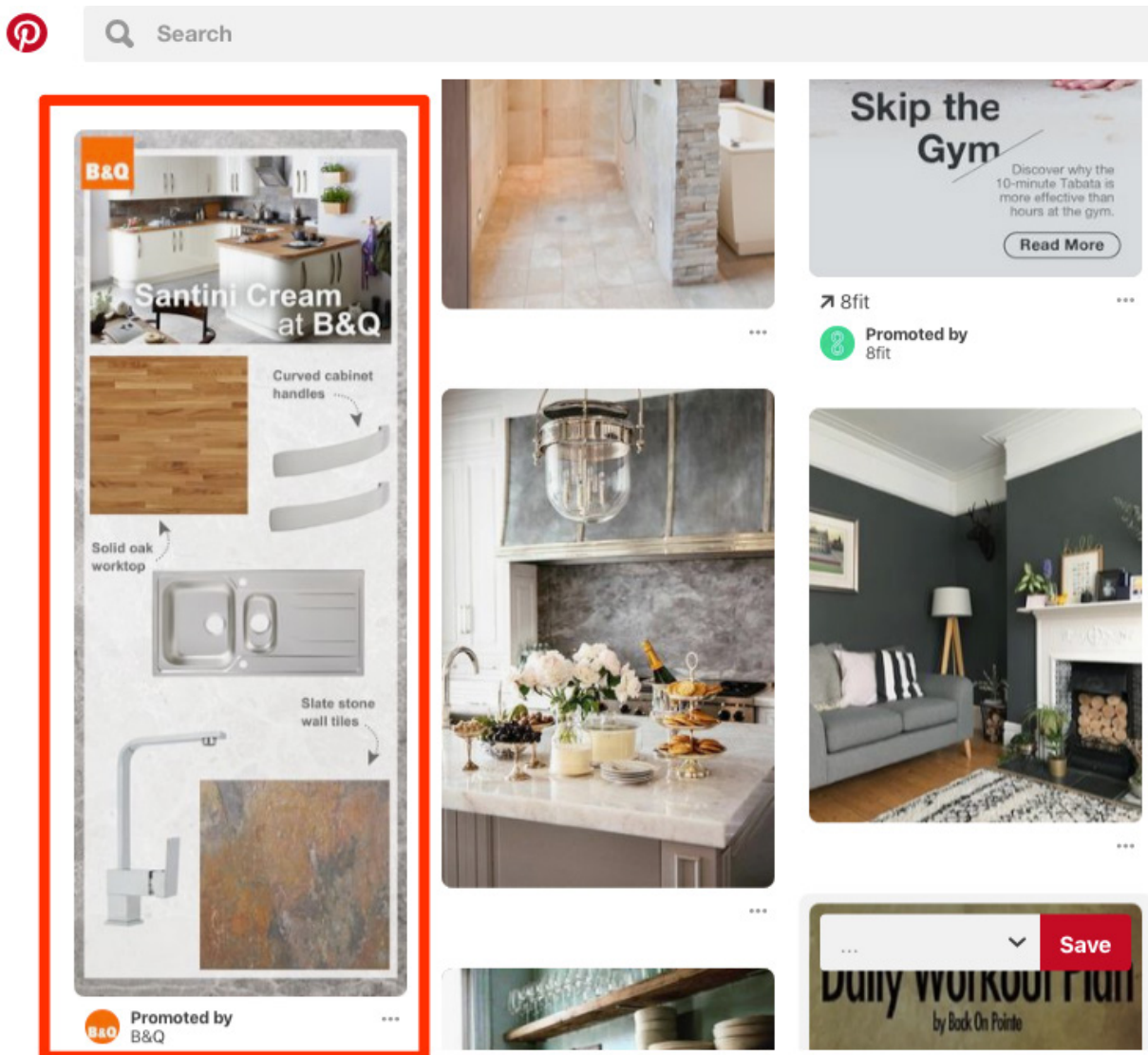
Source: B&Q

4.

Further considerations:

What could the search marketing landscape look like in 2023 and beyond?

It's clear that the search landscape has evolved significantly over the last couple of years. Both voice and visual search are leading to si gnificant opportunities for search marketers.

If you're proactive and willing to adapt based on the examples outlined in this whitepaper, you'll be well equipped to beat your competition to the punch.

Visual search

The future of search will heavily rely on pictures instead of keywords and visual search will only become more accurate and widespread.

With a few improvements to image recognition tech and better smartphone cameras, technology is not far from being able to take a picture of a stranger's outfit and buying the same clothes instantly. From there, the most natural evolution of visual search technology would be to incorporate augmented reality.

Although visual search will never replace the text-based search variety altogether, it will certainly open up a world of possibilities for certain types of brands - mainly fashion and home decor. It's safe to assume that the future of visual search engines will be retail-dominated.

Shifting focus from links to answers

Due to the decline in mobile organic CTR due to Google answering customer queries within the SERPs (search engine results pages), there's a need for brands to try to optimise for searches that might not necessarily result in a click.

Rand Fishkin recently produced a really interesting post on this topic which contained data on the rise of 'non-click' searches taking place on Google over the past three years.

Perhaps SEOs will have to account for influencing searchers without earning a click, and due to the absence of reliable attribution they may not even know that a search happened.

No-click searches, desktop vs. mobile, Google US

■ Desktop no-click searches ■ Mobile no-click searches
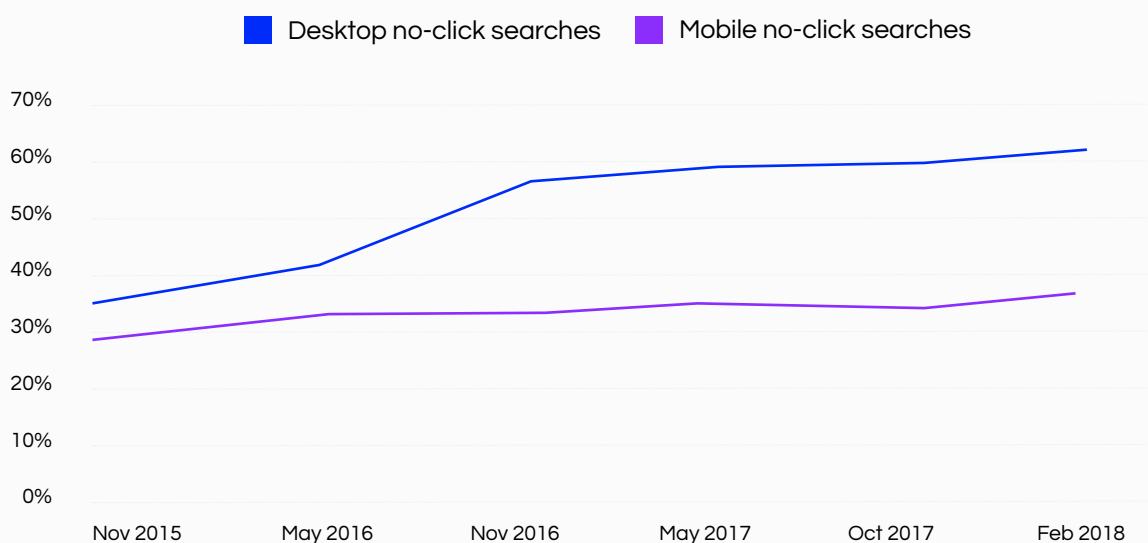
Source: Sparktoro

Essentially brands must continue to focus for optimising for position 0 and enabling Google to provide results without the need for a website visit.

4.3. The missing link: attribution

Attribution and reporting are big roadblocks when it comes to showcasing the value of voice and visual search to clients.

Many of the leading reporting platforms out there don't enable marketers to report on visual search impressions, and voice search reporting and attribution features are currently non-existent.

Over the next couple of years, major search engines will need to make this data available so marketers and agencies can use it to accurately judge and report on the value of voice and visual search.

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