**Google Assistant TTS Internationalization Screener**

Known, February 2023

Background & Objectives

Most of Google Assistant’s voices were built 3-5 years ago, and in that time, there’s been a shift in user expectations, shifts in our target audience, and TTS technology. Research today reveals that the GA voice is perceived less favorably than competitors in key international markets. There’s an opportunity to redefine GA’s voice strategy for the next 3+ years and develop voices that will strengthen ties with users.

|  |  |
| --- | --- |
| **Methodology** | **International:** * Online activities - 3 days starting on Monday, 3/13
	+ **BR, DE, FR, IN; N=45 each**
* Groups - week of March 20 (early in week)
	+ **BR, DE, FR; N=18 (6 groups of 3)**
	+ **IN; N=30 (10 groups of 3)**

**US:*** Online diaries: 3 days; week of April 10; **N=45**
* Groups: week of April 17; **N=18 (6 groups of 3)**
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| **Audience** | * **Standard Criteria**
	+ Mix of age 18+ (minimum of 10 of Gen Z, Millennials, & Gen X in each market) (S1B)
	+ Mix of gender, ethnicities (if applicable), employment, HHI, education, HH composition, political leanings (S0 - S10)
	+ Min 25% of respondents who speak more than one language at home in US, FR & IN / Best efforts in DE & BR (S11)
	+ No tech research participation in the past 3 months (S2)
	+ Non-compete/Industry-sensitive employment (same with HH members) (S3)
	+ Articulate (A1)
* **Tech Criteria**
	+ All must be current digital assistant users
		- 30% each of GA, Siri, & Alexa users and 10% Bixby users (S12)
		- Must use their DA at least every few days (S14)
		- ~75% mobile users (S13)
		- ~50% home device users (speaker and smart displays) (S13)
 |

**ATTENDEE INFORMATION**

DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

INTERVIEWER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

FULL NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CITY:

STATE/COUNTRY: \_\_\_\_\_\_\_

ZIP: \_\_\_\_\_\_

PHONE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Hello, my name is \_\_\_\_\_, I’m calling from \_\_\_\_\_\_\_\_\_, an independent market research company based in \_\_\_\_\_.

This is not a sales-related call. Your responses will be treated in the strictest confidence and none of the opinions you give us will be attributed to you.

**SCREENER**

Since we are seeking a variety of perspectives, let me first ask you a couple of questions about you.

Some questions can be sensitive in nature. We would like to remind you that your participation is strictly voluntary and that your responses are used for research purposes only. A “Prefer not to answer” option is available for you to select, if the case.

S1A. Which gender do you identify with?

\_\_\_\_\_ Male

\_\_\_\_\_ Female

\_\_\_\_\_ Non-Binary

\_\_\_\_\_ Prefer not to say

\_\_\_\_\_ Prefer to self-describe: (please specify)

**RECRUIT MIX**

S1B. What is your age? \_\_\_\_\_\_\_\_\_\_\_ (**RECORD**)

\_\_\_\_\_ Under 18 years old **[TERMINATE]**

\_\_\_\_\_ 18-25

\_\_\_\_\_ 26-35

\_\_\_\_\_ 36-45

\_\_\_\_\_ 46-55

\_\_\_\_\_ 56-64

\_\_\_\_\_ 65 or older

**RECRUIT A MIX ACROSS RANGE**

**MIN 10 OF GEN Z, MILLENNIAL, & GEN X IN EACH MKT**

**CODE AS GEN Z (1997-2012), MILLENNIAL (1981-1996), OR GEN X (1965-1980)**

S1C. What is your ethnicity? (Select all that apply) **LOCALIZE / REMOVE AS RELEVANT FOR EACH COUNTRY. WE WILL REMOVE THIS FOR INDIA**

\_\_\_\_\_\_\_ White

\_\_\_\_\_\_\_ Black or African American

\_\_\_\_\_\_\_ Native American or Alaskan Native

\_\_\_\_\_\_\_ Hispanic / Latino

\_\_\_\_\_\_\_ Asian

\_\_\_\_\_\_\_ Pacific Islander

\_\_\_\_\_\_\_ Other, please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_ Prefer not to answer [EXCLUSIVE]

**RECRUIT MIX (IF APPLICABLE)**

S2. For this portion of the study, we need some people who have participated in market research before and some who have not. When was the last time, if ever, you participated in a market research discussion about technology?

 **[DO NOT READ]**

 Within the past 3 months………………………………………………...1 **HOLD**

 More than 3 months ago………………………………………………….1 **CONTINUE**

 Never……………………………………………..…………………………………..1 **CONTINUE**

S3. Do you or does anyone in your household work in any of the fields or categories?

\_\_\_\_\_ A marketing, branding, advertising, or market research firm - [**TERMINATE]**

\_\_\_\_\_ A company involved in the clothing or fashion industry - [**CONTINUE]**

\_\_\_\_\_ A newspaper, magazine, or other written periodical -[**CONTINUE]**

\_\_\_\_\_ An entertainment or media company [**CONTINUE]**

\_\_\_\_\_ A software or technology company [**TERMINATE]**

\_\_\_\_\_ None of the above – [**CONTINUE]**

S4. Which of the following **best describes your employment status**? (Please select one).

\_\_\_\_\_ Employed Full-Time (working 30 or more hours per week)

\_\_\_\_\_ Employed Part-Time (working less than 30 hours per week)

\_\_\_\_\_ Self-Employed

\_\_\_\_\_ Laid-off / looking for work

\_\_\_\_\_ Homemaker or Stay-at-home parent

\_\_\_\_\_ Full-Time Student

\_\_\_\_\_ Part-Time Student

\_\_\_\_\_ Retired

\_\_\_\_\_ Other

 **RECRUIT A MIX BUT RECRUIT MAJORITY FULLY OR PARTIALLY EMPLOYED (~75%)**

S5. Which of the following income categories best describes your total **annual household income**? **(LOCALIZED FOR INDIA)**

\_\_\_\_\_Less than INR 10,00,000

\_\_\_\_\_INR 10,00,001 to 20,00,000

\_\_\_\_\_INR 20,00,001 to 30,00,000

\_\_\_\_\_INR 30,00,001 to 40,00,000

\_\_\_\_\_INR 40,00,001 to 50,00,000

\_\_\_\_\_INR 50,00,001 or more

\_\_\_\_\_Decline to answer- **TERMINATE**

**RECRUIT MIX**

S6. What is the highest level of education you have completed or are in the process of completing? **(LOCALIZED FOR INDIA)**

\_\_\_\_\_\_\_ No school - **TERMINATE**

\_\_\_\_\_\_\_ Elementary School- **TERMINATE**

\_\_\_\_\_\_\_ Middle School- **TERMINATE**

\_\_\_\_\_\_\_ High School

\_\_\_\_\_\_\_ Bachelor’s Degree

\_\_\_\_\_\_\_ Master’s Degree

\_\_\_\_\_\_\_ Professional degree or Doctorate (PhD)

**RECRUIT A MIX OF QUALIFYING EDUCATION LEVELS**

S7a. Which of the following best describes your household?

\_\_\_\_I live with a partner and one or more children under 18  **CONTINUE TO S7b**

\_\_\_\_I am a single parent with one or more children under 18  **CONTINUE TO S7b**

\_\_\_\_I live with a partner **SKIP TO S8**

\_\_\_\_ I live with other adult family members (eg, extended family, adult children)

 **SKIP TO S8**

\_\_\_\_I live by myself **SKIP TO S8**

\_\_\_\_I live with a roommate/with roommates. **How many?** \_\_\_\_\_\_ (**CAPTURE**)

 **SKIP TO S8**

\_\_\_\_Other [Please specify]

**RECRUIT MIX**

S7b. What are the ages of your children? \_\_\_\_\_\_\_ **(CAPTURE VERBATIM)**

\_\_\_\_0-5

\_\_\_\_6-9

\_\_\_\_10-12

\_\_\_\_13-16

\_\_\_\_17-18

**RECRUIT MIX**

S8. Which of the following do you consider to best describe where you live? **(LOCALIZED TO INDIA)**

\_\_\_\_\_\_\_ An urban area (TIER 1 OR 2 CITIES)

\_\_\_\_\_\_\_ A suburban area

**RECRUIT MIX**

S9. What is your city and state? \_\_\_\_\_\_\_ **(CAPTURE)**

**CODE AS GEOGRAPHICAL REGION**

**RECRUIT MIX FROM DELHI, MUMBAI, BENGALURU, HYDERABAD, INDORE, LUCKNOW (SMALL TOWNS AROUND LUCKNOW)**

S10. How would you describe your political views today? **(WORKS FINE FOR INDIA)**

\_\_\_\_\_\_\_ Very conservative

\_\_\_\_\_\_\_ Somewhat conservative

\_\_\_\_\_\_\_ Neither conservative nor liberal

\_\_\_\_\_\_\_ Somewhat liberal

\_\_\_\_\_\_\_ Very liberal

 **RECRUIT A MIX**

S11. What language(s) do you speak at home? **RECORD VERBATIM**

 **IF US, MUST INCLUDE ENGLISH**

 **IF DE, MUST INCLUDE GERMAN**

 **IF FR, MUST INCLUDE FRENCH**

 **IF BR, MUST INCLUDE PORTUGUESE**

 **IF IN, MUST INCLUDE HINDI**

 **US, FR: AIM FOR ~25% WHO SPEAK MULTIPLE LANGUAGES AT HOME**

 **BR & DE: AIM FOR 4-5 WHO SPEAK MULTIPLE LANGUAGES AT HOME**

**IN: TARGET MIN. 30% ENGLISH + NATIVE PROFICIENT IN REGIONAL LANGUAGE OTHER THAN HINDI (E.G. TAMIL, TELUGU, MALAYALAM, BENGALI, KANNADA, ORIYA) / 30% HINDI WITH NO/LIMITED PROFICIENCY IN ENGLISH / 30% BOTH ENGLISH + HINDI**

S12. “Digital assistants” (often called “voice assistants”) are applications or technologies with which you can communicate with using your voice on your phone, smart speaker or other smart device. Some examples of voice assistants are Apple Siri, Google Assistant (“Hey Google”), and Amazon Alexa. Do you use a digital assistant on any of your devices? If so, select which one(s).

\_\_\_\_\_\_\_ I never use a digital assistant - **TERMINATE**

\_\_\_\_\_\_\_ I use Google Assistant

\_\_\_\_\_\_\_ I use Siri

\_\_\_\_\_\_\_ I use Alexa

\_\_\_\_\_\_\_ I use Bixby

\_\_\_\_\_\_\_ Other [Please specify]

**MUST USE A DIGITAL ASSISTANT**

**RECRUIT MAX 10% BIXBY**

**RECRUIT 30% EACH OF GA, SIRI, & ALEXA**

S13. Which language do you prefer to use with your digital assistant? **RECORD VERBATIM**

 **IF US, MUST LIST ENGLISH**

 **IF DE, MUST LIST GERMAN**

 **IF FR, MUST LIST FRENCH**

 **IF BR, MUST LIST PORTUGUESE**

 **IF IN, MUST LIST HINDI OR ENGLISH (AIM FOR MIX)**

S14. How often do you use your digital assistant?

\_\_\_\_\_\_\_ More than once per day

\_\_\_\_\_\_\_ Once a day

\_\_\_\_\_\_\_ Once every few days

\_\_\_\_\_\_\_ Once a week **TERMINATE**

\_\_\_\_\_\_\_ Less than once a week **TERMINATE**

**MUST USE AT LEAST EVERY FEW DAYS**

S15. a. Which, if any, of the following do you use with your digital assistant?

[**READ OUT. SELECT ALL THAT APPLY**]

b. Could you please tell me the makes and models of the devices? [**RECORD MAKE/MODEL VERBATIM - ENSURE MAKE (BRAND) IS PROVIDED MODEL IS OPTIONAL**]

|  |  |  |
| --- | --- | --- |
| **(RANDOMIZE)** | **a.** Which, if any, of the following do you use with your digital assistant?  | **b.** Could you please tell me the makes and models of the devices?  |
| Smartphone | 1 | **AIM FOR 75%** |  |
| Tablet (e.g., Apple iPad, Samsung Galaxy Tab, etc.)  | 2 |  |  |
| Smartwatch (i.e., an electronic watch that can perform multiple functions such as accessing apps, playing music, making / receiving phone calls, etc.) | 3 |  |  |
| Smart Speaker (Echo Dot, Apple HomePod, Google Nest, etc.) | 4 | **AIM FOR 50%** |  |
| Smart Display (Amazon Echo Show, Facebook Portal, etc.) | 5 |  |
| Voice-controlled wireless earbuds (e.g., Apple AirPods, Google Pixel Buds)  | 6 |  |  |

**MUST USE ON SMARTPHONE, SMART DEVICE, AND/OR SMART DISPLAY**

**AIM FOR 75% WHO USE ON MOBILE DEVICE**

**AIM FOR 50% WHO USE ON SMART SPEAKER OR SMART DISPLAY**

**ARTICULATION & PAST PARTICIPATION**

A1. Share with me how you feel about your digital assistant

* What do you use your digital assistant for?
* What’s the best feature it has?

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**LISTEN FOR RESPONSE AND RECORD. NEEDS TO SAY A FEW PHRASES TO DEMONSTRATE THAT RESPONDENT IS THOUGHTFUL AND ARTICULATE.**

A2. Based on your responses you've qualified for a 2-part study that will take place online during the weeks of \_\_\_\_\_\_\_\_. The first part of the study will consist of you joining other participants and a moderator for a [90-minute virtual] focus group. In the second part of the study, you will spend about 30 minutes per day answering prompts via video, photo and text responses over a 3-day period. For your time and full participation, you will receive \_\_\_\_\_\_\_\_\_. We promise that the study will be fun and engaging! Are you available and agree to fully participate in this study?

 \_\_\_\_\_Yes

 \_\_\_\_\_No **[TERMINATE]**

To participate in the study, you will be required to read and agree to a participant consent form that confirms that you agree not to disclose any confidential information about the study to any third party or on any social media or digital platform, you authorize any audio or video recording of your participation in the study and to the collection and use of any personal information you provide, including, but not limited to, audio and video recordings, for use in connection with the study and for internal research purposes only, and you agree that any ideas, suggestions, inventions, designs, feedback or improvements you share or discuss during this study will be owned by the study sponsor. You will need to provide your consent prior to your participation in the study.

Do you agree to read this consent form prior to participation?

**Yes \_\_\_\_\_ (confirm and schedule)**

**No \_\_\_\_\_\_ TERMINATE**