

Milestone 1/4

Understanding the Market & Insights of ChatGPT's Voice input

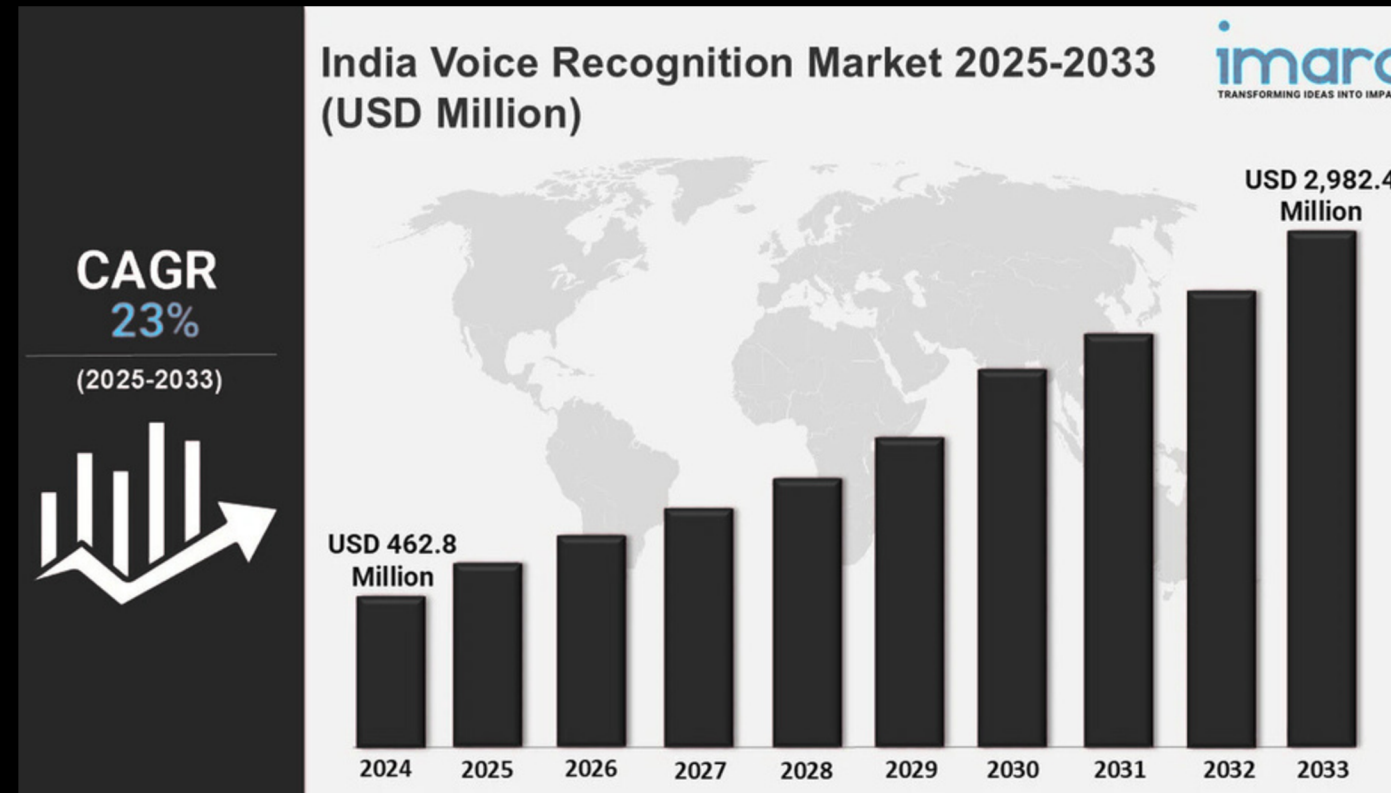


Increase the usage of
voice input on the
ChatGPT mobile app

Market Size

- Indian voice recognition market is experiencing rapid expansion, projected to grow at a 23% CAGR between 2025 and 2033. The market value was USD 462.8 million in 2024 and is forecasted to reach nearly USD 3 billion by 2033.
- The voice and speech recognition segment alone generated USD 322 million in 2023, expected to exceed USD 1.1 billion by 2030 at an annual growth rate of 19.3%.

Indian out input Market analysis



Adoption Patterns

- Devices: Smartphones and tablets accounted for 47.4% of the Indian voice recognition market in 2024, with wearables being the fastest-growing segment (24.3% CAGR).
- Consumer age trends: Highest adoption rates are among the 18-34 age group (77%), followed by 35-54 (63%), and 30% among those 55+.
- Top Platforms: Google Assistant leads, followed by Amazon Alexa and Apple Siri; regional solutions such as Haptik address local needs.

Growth Drivers

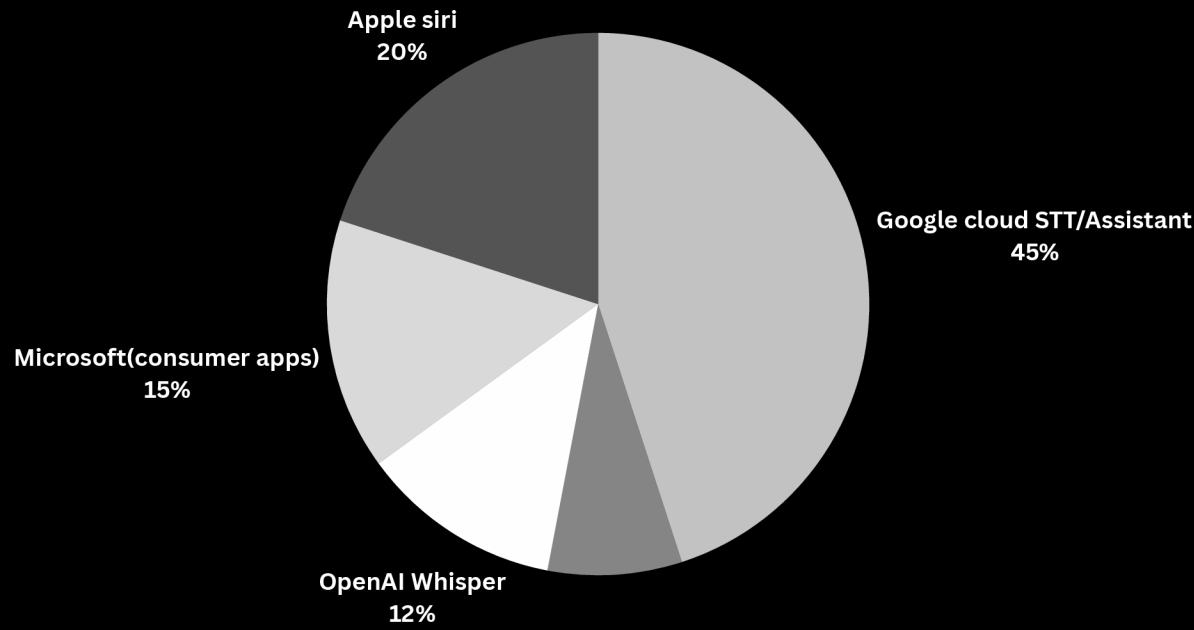
- Smartphone Usage: India's smartphone shipments reached 153 million units in 2024, making smartphones the dominant device for voice input adoption.
- Regional Languages: Over 60% of voice queries in India now occur in regional languages.
- Consumer Preferences: Voice, not typing, but hands-free is becoming the preferred input method — for users with limited literacy
- Tech Growth: AI-powered voice assistants support better accent and dialect recognition, making technology more accessible to diverse populations

Market Challenges

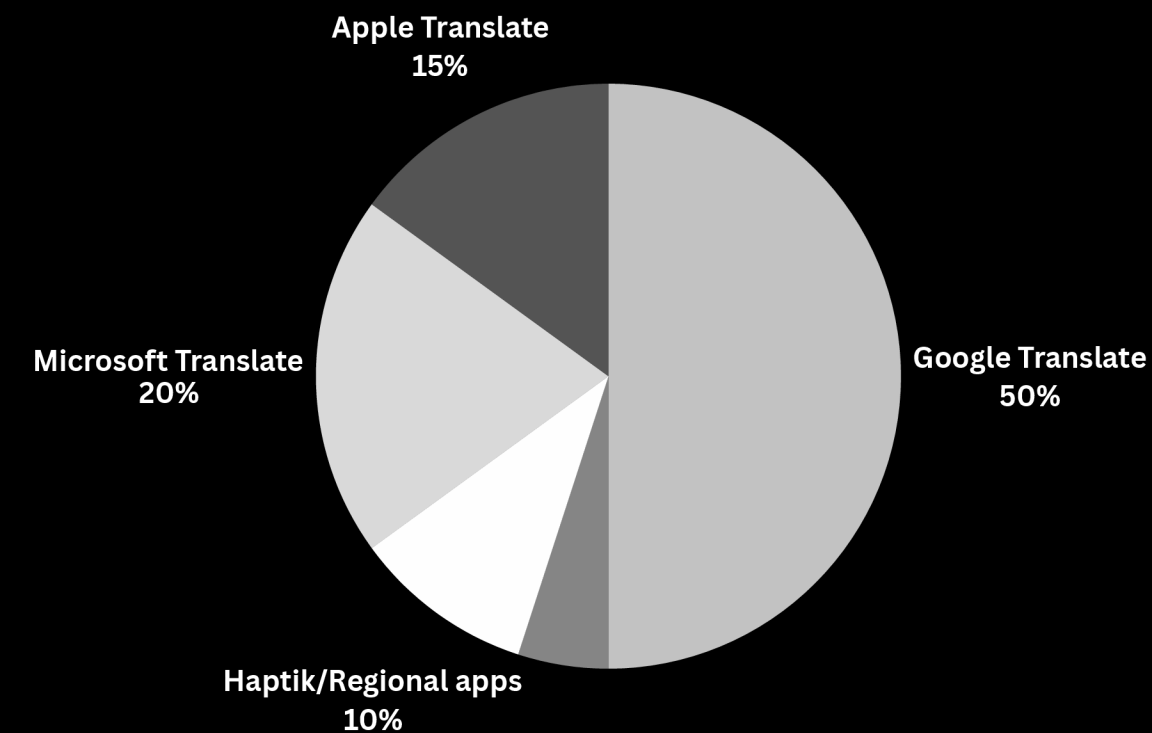
- Language & Dialect Diversity: India's vast linguistic landscape, and dialects, presents significant hurdles for achieving high speech recognition accuracy and delivering localized solutions.
- Digital Literacy & Rural Adoption: While affordable smartphones are increasingly available, many users in rural demographics—face barriers in adopting and effectively using voice technologies due to low digital literacy.
- Data Privacy & Security: The sensitivity of voice data, when used for financial transactions, healthcare, and digital government services, raises complex challenges around secure data collection, storage, and regulatory compliance.
- Accent & Code-Switching Complexity: Indian users frequently switch between languages and use highly varied accents or slang, which can confuse speech-to-text systems and affect reliability.
- Connectivity Limitations: Stable and fast internet is still not available in many remote and rural areas, impacting the performance and accessibility of cloud-based voice solutions that rely on online processing.

Competitor Analysis

Speech to Text Usage in India 2025



Speech to Speech Usage in India 2025



Parameters	ChatGPT	Perplexity	Whatsapp voice	Alexa	Siri	Google Asistant
Wake Word	Manual Prompt	Manual Prompt	Manual Prompt	“Alexa”	”Hey Siri”	“Ok Google”
Function	AI Search tool(STT/STS)	AI Search Tool	Voice Chat/Messagin g	Virtual Asistance	Virtual Asistance	Virtual Asistance
Icon Visibilty	Multiple icons for voice input	Mic tool	Mic tool	Mic Tool	touch	Mic Tool
Interactive modes	Text,Voice	Text,Voice	Voice chat,Calls	Voice,touch, Screen	Voice,Touch	Voice,Touch, Screen
Voice o/p Quality	Synthesized	Synthesized	Human Recordings	Natural,Exp resive	Natural,Expr essive	Natural,Expre ssive
Cross-Device Integration	Web,API, Mobile APP	Web, Mobile app	Mobile,Desktop	Speakers,Di splays,Smart Homes	Speakers,Dis plays,Smart Homes	Speakers,Disp lays,Smart Homes
Voice Pause Option	N/A	N/A	Available	N/A	N/A	N/A

Mapping Business Outcome to Product Outcome for ChatGPT's Voice Input

Goal

Increase the Adoption of users to voice input (speech-text/speech-speech) by creating an accessible experience. Encourage first time and repeat use while eliminating the barriers. making it a seamless interaction

Why the product Outcome matters?

Increasing the adoption of voice considering and improving the metrics derived from the below KPI, ensures broader accessibility and inclusion, making voice feature more useful in diverse scenarios and user needs. It improves engagement and retention by offering easy hands-free interaction. This drives over all product value, growth and competitive differentiation in Voice input market.

KPI

