THE NEW VOICES

PREPARING FOR A HEADS-UP WORLD

BY **MEDIAHUB**

MULLENLOWE
MEDIAHUB

FOREWORD

The voice revolution has arrived. The reality is that developments in AI have become a part of everyday life: One out of every six people across the U.S. owns an in-home assistant, market penetration of these devices just surpassed wearables, and not too long ago a baby's first word was "Alexa."

This excites us. It excites us because we get to be at the forefront of change. It excites us because it is a moment when humanity begins to change how it works and interacts with its surroundings.

Yes, 50% of all searches in 2020 will be voice, but digging deeper, it means that we as humans will be using our temporal lobe more frequently — building our hearing and imaginative skills in our brain and relying less on visual cues than in years before. And all of that means *change* for brands, marketers, and communicators.

At Mediahub, we believe challenger brands need to stay ahead of changing dynamics by digging into emerging technologies in a validated, multifaceted way. When we began our research, the studies to date were robust when it came to industry expert opinions, but light on consumer-first insights. So we set out to conduct a study that changed that narrative: We wanted to hear from people who are using voice devices daily in real life, and give some real, ready-to-use insights for marketers *right now*.

So with the consumer first in our mind, we set out to understand all the voices in the room, and better understand this heads-up revolution.

Here's to the future.

John Moore

METHODOLOGY

We developed a methodology that centered on our proprietary insights survey tool, Scout. Scout is built to identify the unique behaviors of today's media world. **Through Scout, we developed a custom study to understand voice through the lens of the consumer today and tomorrow, and uncovered how brands can be present and thrive in a voice-activated world.** We fielded an online survey of 72 questions to 500 consumers—400 in-home assistant users and a control group of 100 non-users. The panel of respondents were comprised of Internet users 13–44 who are English speaking. In-home assistant users were represented based on in-home assistant ownership across the U.S. (70% Amazon, 20% Google, 10% other). The survey was fielded in May 2018.

In addition to our quantitative study, we tapped into the Mediahub Voice Lab, an in-house test and learn space in New York City powered by voice devices including Amazon Echo, Google Home, Apple HomePod, and Microsoft Cortana, among others. The lab is run by a team of search and SEO experts whose primary focus is to stay ahead of the voice landscape by testing new innovations and upgrades to these devices. In the lab, we worked with the team to push further on the consumer insights gleaned from our qualitative study to understand their implications.

Finally, to round out our research, we interviewed Adam Marchick, CEO and founder of Alpine.AI, which powers voice platforms for retailers, for additional insight into the voice-enabled path to purchase.

scout™

WHY WE CONDUCTED OUR RESEARCH STUDY

OTHER RESEARCH STUDIES

INDUSTRY FIRST | Started with the experts, supported with quantitative

DEVICE FIRST | Started with devices to test current challenges and possibilities

CONSUMER FIRST | Scratched the surface on insights, but most were covered via syndicated studies

Skill concentrated and device obsessed

Single generations only, and missing teens

Future-focused

Simple stories around daily usage

Lacking cultural insights for media planning

Heaviest emphasis on shopping "disruption," and broader implications for industries

Designed for "why you should care"

OUR RESEARCH STUDY

CONSUMER FIRST + DEVICE INSIGHTS, EXPERTS AS AN ADDITIVE LAYER | We went to the consumers first to see what they thought before we formed our opinions. Then we took what we learned, got into our consumers voice, and went to the devices to go deeper in insights. Finally, once we formed our hypotheses, we brought them to the experts for added dimension.

Not just a "how-to" but a consumer insights piece built from real humans

Multi-generation focus

Past- present- and future-focused

Deeper in the context of all moments and usage

Found moments that matter in the upcoming planning cycle

A deeper dive in all verticals like cooking and beauty, and which ones have the most to gain

Designed for "how consumers care" and "how you should care"

KEY QUESTIONS WE WANTED TO ANSWER

AUDIENCE AND EMOTIONAL CONNECTION

What do consumers really think about, use, and want from their voice-enabled devices? What demographics are growing and not growing in the space? Who is using their device most frequently?

VOICE TODAY

How have voice adopters evolved the way they use their devices? What categories and commands can current users not live without? Where, when, and what time of day are devices being used?

VOICE TOMORROW

What are consumers' unmet needs in the voice space? What upcoming technology advancements like the Amazon Echo screen are consumers excited about? What upcoming media moments— like summer travel, back to school, and fall sports— will voice be a part of?

WHAT THIS MEANS FOR BRANDS

How is voice impacting major verticals like shopping, travel, and entertainment?
What brands and categories belong in the space? How can brands add value to voice?

5

KEY TAKEAWAYS

No. 1 *THE EMOJI GENERATIONS HAVE FOUND THEIR VOICE AGAIN*

No. 2 *FROM ONE TASK IN ONE ROOM TO TRANSFORMING THE WHOLE HOUSE*

No. 3 *CONSUMER TRUST IS HIGH, BRANDS AND PROVIDERS HAVEN'T CAUGHT UP*

No. 4 *THE SCREEN WILL FUEL SHOPPING; TRAVEL AND WELLNESS ARE NEXT TO BREAK*

No. 5 *BY 2020, 60% WILL BE HEADS-UP SEARCHING*

KEY TAKEAWAY NO. 1

THE EMOJI GENERATIONS HAVE FOUND THEIR VOICE AGAIN

Unlike most new technologies, adoption rate for in-home assistants was 2x higher for Gen X compared to Millennials. And while Gen X was the early adopter of the category due to their financial liquidity, we found their usage wavering. It's older Millennials, with their demand for tech connectivity and utility everywhere they go, that now make up the core audience of in-home assistant owners. Meanwhile, kids and teens are catapulting their way into the space and changing how the technology is leveraged, leading us to predict that the gap between younger and older audiences will widen dramatically in the near future.

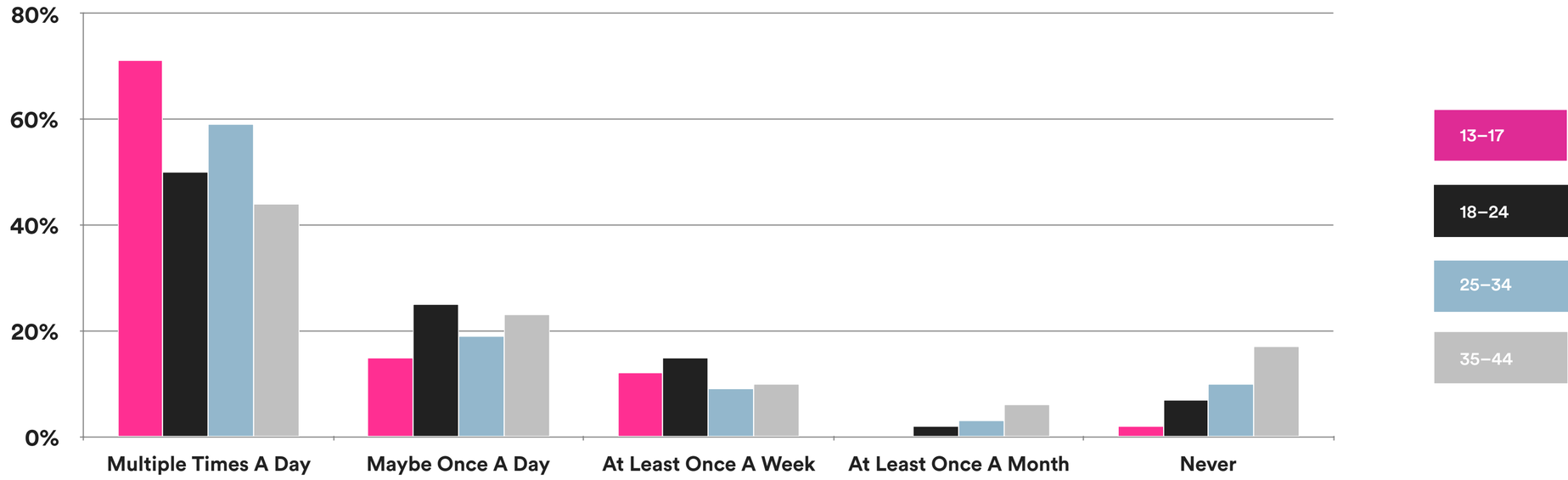
Among the different stages of adoption happening, different relationships have surfaced by demographic. On one end of the spectrum, older consumers are 28% more likely to use their in-home assistant for search in the privacy of their home, while Gen Z is leveraging their devices beyond basic functionality and looking to bring their devices into the physical world. When we look in the middle of the spectrum, differentiation is still prevalent even among daily tasks. For example, 18–24-year-olds are integrating in-home assistants into their daily lives in utility-focused ways: They are 38% more likely to use their device to transcribe texts or emails. 25–34-year-olds see utility as a way to achieve tasks more efficiently: They know what they are looking for, as they are 33% more likely to use their device for skills and actions, making them harder to reach via search. 25–34-year-olds are also 10% more likely to have the Amazon Dash button, which will likely expand into other applications and eradicate the typical shopping funnel.

KEY TAKEAWAY NO. 1

THE EMOJI GENERATIONS HAVE FOUND THEIR VOICE AGAIN

Even more interesting is that devices are giving youth a voice again. Specifically older Millennials and Gen Z, who are a part of generations known for refusing to talk on the phone, are now leaning in and talking to a robot. We found the most drastic shift with teens: 71% of teens use their device multiple times a day, 17% higher than the average user. Teens are 25% more likely than early adopters to connect their in-home assistant to other devices including their smartphone, stereo, Netflix, and even kitchen appliances. Their needs go beyond utility, wishing their device could provide aspirational content like beauty tips and fashion pairings.

HOW FREQUENTLY DO YOU USE YOUR IN-HOME ASSISTANT?



As devices become more used throughout the family, children ages 2–12 are just as nascent to adopt the technology. We found they are using voice to command TVs as often as they are using it for search (18%). Kids and teens are becoming the biggest ambassadors in the family, pushing in-home assistants beyond basic search for greater entertainment value. 18–24-year-olds are pushing even further into purchasing online and hoping voice technology will help them in retail stores. In contrast, we found that older consumers continue to rely on the functional value of the product: They are 28% more likely to use their device to search/ask questions, with entertainment largely untapped.

The path to awareness for voice varies across demographics—it's not a one-size-fits-all approach. Overall discovery comes from the feed, with 40% of users learning about skills from social media, with bloggers more prevalent among younger consumers and celebrities more prevalent among older consumers. TV is next in line, especially among older consumers: 35–44-year-olds are 15% more likely to discover skills through TV commercials.

THERE ARE OPPORTUNITIES ACROSS ALL AGE GROUPS, BUT AS A MARKETER YOU NEED TO UNDERSTAND THE NUANCES OF VOICE BETWEEN THESE DISTINCT AGE GROUPS

BEYOND THE PLAYGROUND
CHILDREN 2–12

DEVICE-INDEPENDENT

47% use their in-home assistant unsupervised

#1 time for usage is **AFTER SCHOOL**

28% less likely to view their device as an **ASSISTANT**

27% more likely to view their device as a **FRIEND**

ENTERTAINMENT DOMINATES UTILITY. ONLY DEMOGRAPHIC WHERE TV USAGE IS AHEAD OF SEARCH USAGE

IMPLICATIONS

TV IS YOUR GATEWAY

AFTERNOONS ARE THE MOMENT FOR IMPACT

NEW-SCHOOL CONNECTIVITY
13–17-YEAR-OLDS

EMOTIONALLY ATTACHED

27% more likely to speak to their device when they are lonely

71% use their device multiple times a day

40% use their device all day long

CONNECTIVITY TRANSFORMS ENTERTAINMENT

77% connect to their **smartphone**
46% connect to their **sound/stereo**
39% connect to **TV**
37% connect to **Netflix**

CRAVE HIGHLY INTERACTIVE EXPERIENCES

27% wish their device could provide **beauty looks**

20% wish their device could pair **outfit ideas**

IMPLICATIONS

AIM FOR INTEGRATION ACROSS DEVICES

DIAL UP THE ASPIRATION

ADDING PHYSICAL DIMENSION
18–24-YEAR-OLDS

OMNI-CHANNEL MENTALITY

43% more likely to order products

50% wish their devices could come with them to retail stores

TRAVEL AND BEAUTY ARE MASSIVE

38% more likely to use their in-home assistant for travel

96% more likely to seek out beauty

HUMAN-LIKE CAPABILITIES GO HAND IN HAND WITH TRUST

50% wish their device was a real person

75% more comfortable with their device having access to personal data

IMPLICATIONS

GET MORE PERSONAL

THINK PHYSICAL

TECH MAKES LIFE SIMPLE
25–34-YEAR-OLDS

USEFUL IS THE NEW COOL

30% had no reason to purchase their device

13% more likely to have a smart remote

10% more likely to have an Amazon Dash button

MULTITASKING IS THE WAY IN

43% wish their device could manage their schedule

24% wish their device could make dinner reservations

27% wish their device could manage their finances

PERSONALITY COUNTS

50% more likely to notice the "voice" of the assistant

IMPLICATIONS

FOCUS ON VALUE AND UTILITY

YOUR "VOICE" IS EVEN MORE IMPORTANT

UNDERDEVELOPED USAGE
35–44-YEAR-OLDS

NOVELTY HAS WORN OFF

21% less likely to be the primary user of their device in their household

TECHNOLOGY IS EVEN MORE OF A MYSTERY

70% less aware of technology behind their device

USAGE IS STILL TIED TO THE KITCHEN

18% more likely to use their in-home assistant in the kitchen

33% use while cooking

15% to want their device to inspire cocktail choices

CHRISTMAS 2018 WILL BE A PIVOTAL MOMENT

25% more likely to indicate purchase intent this holiday season

IMPLICATIONS

LEAST EMOTIONALLY ATTACHED GROUP

IMPACT WILL BE A CHALLENGE

KEY TAKEAWAY NO. 1

THE EMOJI GENERATIONS HAVE FOUND THEIR VOICE AGAIN

IMPLICATIONS

YOUR ONLY WAY IN IS TO MAKE AND TO TEACH

It might sound obvious, but for one of the first times in our industry you can't buy your way into a channel through media. You really have to be thinking about your audience, and be ready to promote what you're creating. For younger consumers, focus on aspiration, as they are more emotionally attached to their assistants and want to be inspired. For older Millennials, focus on value and how to achieve a task more efficiently.

HYPER-CONTEXT SHOULD BE YOUR STARTING POINT

The context of how, when, and why devices fit into consumers' lives is starting to emerge. One key example is that 18–24-year-olds are most open to sharing personal data and they are using their device to find activities in new cities, so take this context to provide recommendations for where they are going.

"SOUND" IS THE NEW LOOK AND FEEL

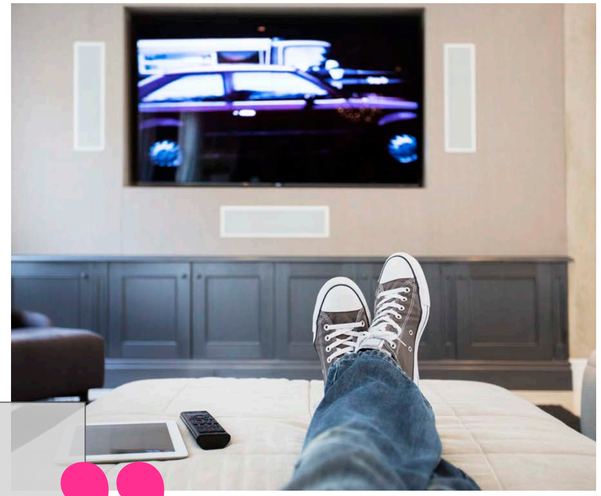
As you start to develop your creative and marketing components of your campaigns, don't just think about the look and feel of them, as you'll need to consider the sound. With so much conversation and discussion on diversity and image, are you thinking about your voice? What does your brand sound like? What does your logo sound like? What do your go-to emojis sound like?

KEY TAKEAWAY NO. 2

FROM ONE TASK IN ONE ROOM TO TRANSFORMING THE WHOLE HOUSE

Modern homes aren't fully wired for in-home assistant technologies, and in-home assistants aren't smart enough to govern modern homes. But it hasn't stopped device expansion inside of the home. **With the evolution of usage, in-home assistants are being promoted from their spot on the kitchen counter, now earning a seat on the couch and transforming the living room.** As primary usage is shifting from utility to entertainment, 57% of users are using their device in the living room, while only 36% are using in the kitchen. Younger consumers are championing this move away from quick tasks toward true entertainment, with older users 75% less like to use their device in the living room.

"I used to use my device exclusively to find and play music. Now I use it for a lot more, to find out what movies are playing near by or for games with my family."



"I love the way my device works with my smart TV to turn channels or help me look for what's on FX tonight."

"After purchasing my device I used to solely check the weather. Now I use it to turn on Netflix or Hulu, and I can ask her to search small things for me."

KEY TAKEAWAY NO. 2

FROM ONE TASK IN ONE ROOM TO TRANSFORMING THE WHOLE HOUSE

With the living room promotion, we will soon see a new symbol of home entertainment emerge. Within our study, we found 56% of all respondents are using their in-home assistants to help them find something to watch on TV. Major cases include questions like "Who are the actors in *Riverdale*?"and "Name that quote from *Game of Thrones*", which complement viewing. However, the tides are turning and as the "TV" continues to evolve it's likely to begin losing ground to voice assistants.

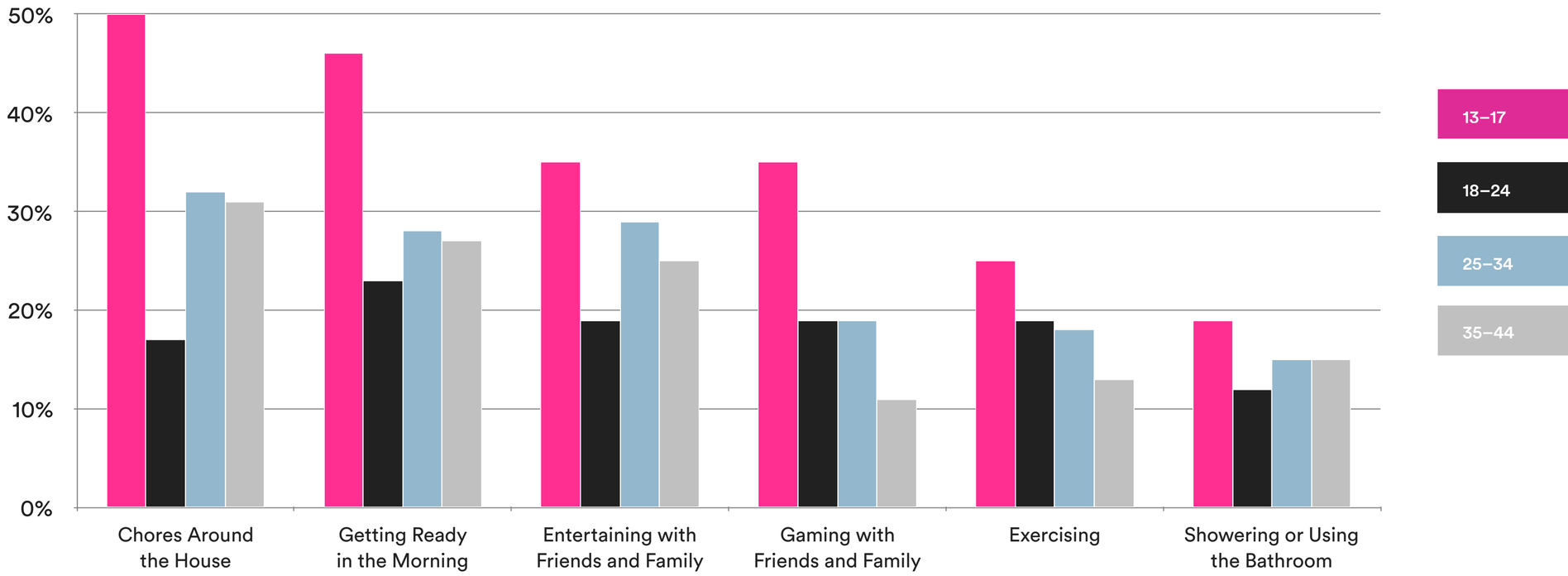
Sports are already seeing major impact: 28% of all respondents listen to the games on their device, such as a baseball game through MLB. While Gen Z and Millennials contribute to lower linear sports ratings, they have a higher propensity to use their device to find out the outcome of games, injury reports, and to follow their favorite players (e.g., how many points LeBron had), posing another challenge to advertisers to reach these audiences in a traditional format. For brands looking to activate around fall sports this season, 58% of respondents plan to use their in-home assistants for fall sports (NFL, MLB, and NFL), presenting a massive opportunity to be a part of this new viewing experience.

KEY TAKEAWAY NO. 2

FROM ONE TASK IN ONE ROOM TO TRANSFORMING THE WHOLE HOUSE

While devices transform the living room, they are also changing behavior throughout the home. Respondents are taking their devices with them as they move throughout their routines and devices are even invited as influencers to get-togethers and parties. Teens show the greatest appetite to integrate their device into moments throughout their lives, identified below, from doing chores around the house to exercising to gaming and entertaining with friends and family.

MICRO-MOMENTS WHEN THEY'RE UTILIZING VOICE



KEY TAKEAWAY NO. 2

FROM ONE TASK IN ONE ROOM TO TRANSFORMING THE WHOLE HOUSE

IMPLICATIONS

CHOOSING A TV SHOW WILL BECOME VOICE-LED

As devices become smarter and less command-focused, entertainment brands will win when they can become the content recommendation engine, providing what's on TV and continuing the conversation around preferred genres, new seasons, and current events.

VOICE CAN MAXIMIZE TV FOMO

Last year Nielsen reported that live tweeting makes up 57% of Twitter TV impressions, helping to fuel interest in live viewing. A major component of this social push comes from actors and actresses themselves. Both Amazon and Google have a notification component to send social media alerts, presenting an opportunity for talent and even influencer marketing across devices.

YOUR APPROACH TO SPORTS NEEDS TO BE REDEFINED (AGAIN!)

It's not just about following your favorite teams on social media or checking Bleacher Report for the quick highlights that are stealing attention from sports. Whether replacing live viewing or complementing the viewing experience, devices prove they are here to stay and will be major outlets for content during the upcoming fall season. Amazon is ahead of the curve, with a *Thursday Night Football* deal delivering the NFL games to Amazon Prime and Twitch users.

IN A WORLD OF DEVICES, NO OTHER DEVICE WILL BE SHARED LIKE IN-HOUSE ASSISTANTS

Mobile moments allow marketers to intercept cracks in the day, while voice provides marketers the opportunity to intercept contextual cracks in the day. First, individually in moments that we were't able to before, such as doing chores or exercising in the home. Second, with multiple people at the same time when devices are being used, in places like gaming with friends or watching TV as a family.

KEY TAKEAWAY NO. 3

CONSUMER TRUST IS HIGH, BRANDS AND PROVIDERS HAVEN'T CAUGHT UP

Although in-home assistants are moving deeper into the home and getting more personal, privacy concerns are top of mind for consumers and industry experts alike. **Consumers are looking for these devices to go beyond the capabilities of robots, looking for more human-like aspects of the products to bring both utility and security.** We dug into these areas further across lapsed users, non-users, and current users to understand impact.

Across lapsed users, we found frustration in usage: It's helpful, but not totally human. This group is 30% more likely to be frustrated with their device when it doesn't answer questions correctly. Core users are less discerning with product capabilities; they feel their in-home assistant is better at providing answers than their phone or computer and they trust it more than customer service reps, indicating higher satisfaction. Even more interesting, 52% of core users say that they trust their in-home assistant more than people.

However, all groups indicate they would use their in-home assistant more if it understand their questions all the time and spoke back as a human vs. a robot—they feel their devices continue to struggle with slang/nicknames, accents, dialects, natural speech, and an inability to understand context or complex sentences.

"I've gotten completely wrong searches because of my accent."

"I get frustrated sometimes when I have to repeat myself over and over again."

"She does't understand or know how to say my name, which is Mariana."

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KEY TAKEAWAY NO. 3

CONSUMER TRUST IS HIGH, BRANDS AND PROVIDERS HAVEN'T CAUGHT UP

The barrier of being a "robot" is one that Amazon and Google are putting significant resources behind, increasing options for voices and language expansion, with Google announcing over 30 languages by year end. Additionally both companies are making continued efforts to push the boundaries in conversation, while humanizing new skills. Google just launched Duplex, a voice assistant that sounds 100% human and can perform simple tasks like "make reservations" or "book an appointment at the salon". All of these developments will merge into extremely smart voice assistants that will transcend their hardware.

Privacy remains the biggest purchase barrier: 50% of non-users would consider purchasing an in-home assistant if privacy was guaranteed. When looking at lapsed users, we found that privacy is a concern for 40% of respondents. However, core users indicated that privacy has diminishing influence, with 20% of respondents expressing concern.

While trust remains a major concern, especially with non-users, and despite the recent privacy plunders with Alexa, the above data suggests consumers will start to trust voice assistants the more they become reliant on them. It's the same way consumers didn't trust social sites like Facebook and YouTube until they became absolutely hooked on them. Finally, as the technology improves, and more examples of the positive impact voice can make on people's lives emerge, we will see voice move to mass-market adoption.

KEY TAKEAWAY NO. 3

CONSUMER TRUST IS HIGH, BRANDS AND PROVIDERS HAVEN'T CAUGHT UP

IMPLICATIONS

DON'T BE LIKE GEN X

Voice is here to stay. If you're holding off on the space because you think voice is a fad, or voice just affects search, you're wrong. Voice is creating a whole new way to interact, and it's becoming an interface of its own.

MAKE YOUR PRESENCE MORE HUMAN

Take advantage of new offerings across devices that offer more human elements; Speech Synthesis Markup Language (SSML) changes Alexa's tone and Amazon Polly offers eight new voices for human-sounding skills. SEO is more critical than ever — brands need to use SEO to find what questions customers are searching for and build web pages or articles to answer these questions.

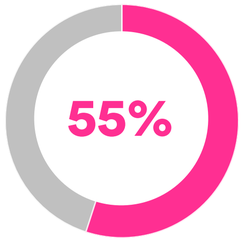
PRIVACY COULD BE USHERED BY GDPR

Voice presents some unique challenges when it comes to being GDPR compliant. Privacy could become even more heightened in the space as consumers have the option to opt out and remove their data.

KEY TAKEAWAY NO. 4

THE SCREEN WILL FUEL SHOPPING; TRAVEL AND WELLNESS ARE NEXT TO BREAK

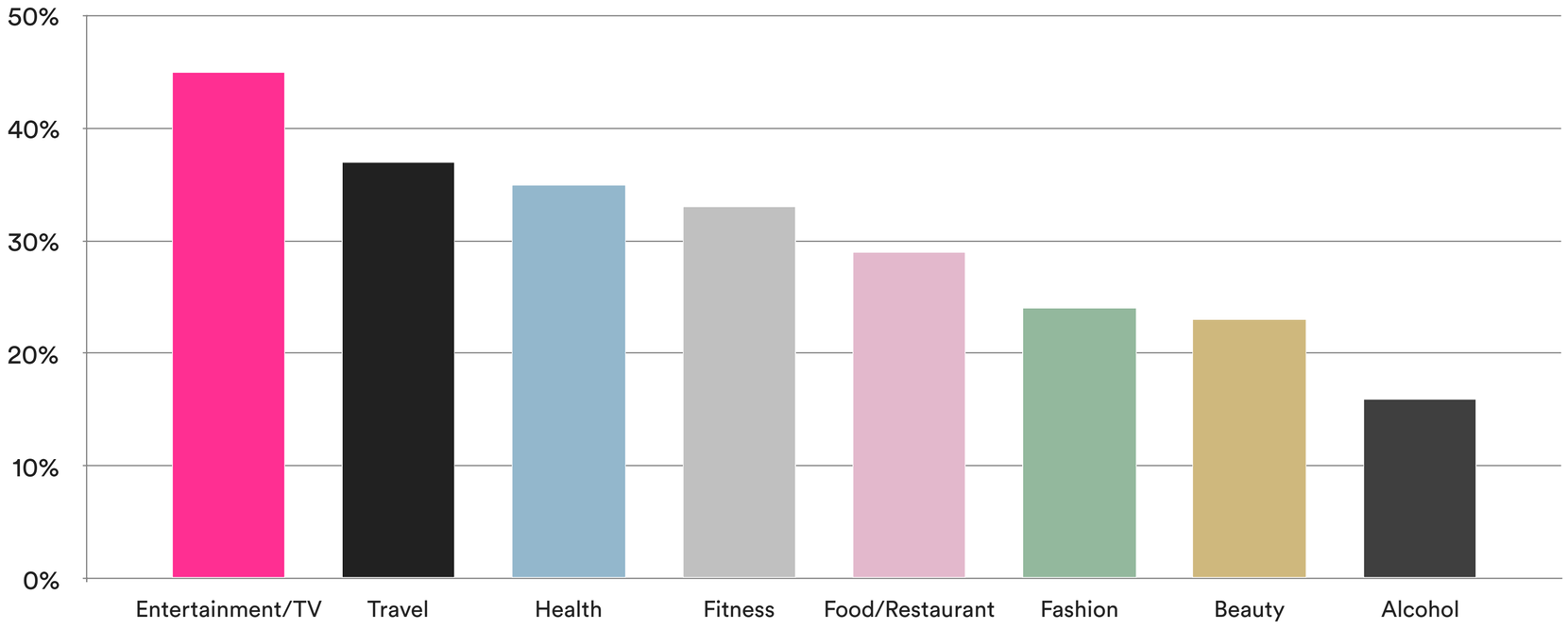
In-home assistant devices will turn the corner by adding an additional sensory layer with screens in late 2018. Given device history around the holidays with gifting and price reduction, we expect the Amazon Echo Show to increase in ownership. This will inevitably be the norm for future devices, and we will see accelerated disruption in categories where visual engagement is so important.



of respondents believe that a screen would make their in-home assistant more useful.

Brands will have the ability for consumers to explore and engage through voice like never before, and, more importantly, consumers are looking for it.

CATEGORIES RESPONDENTS WANT IN THE VOICE ENABLED SEARCH SPACE

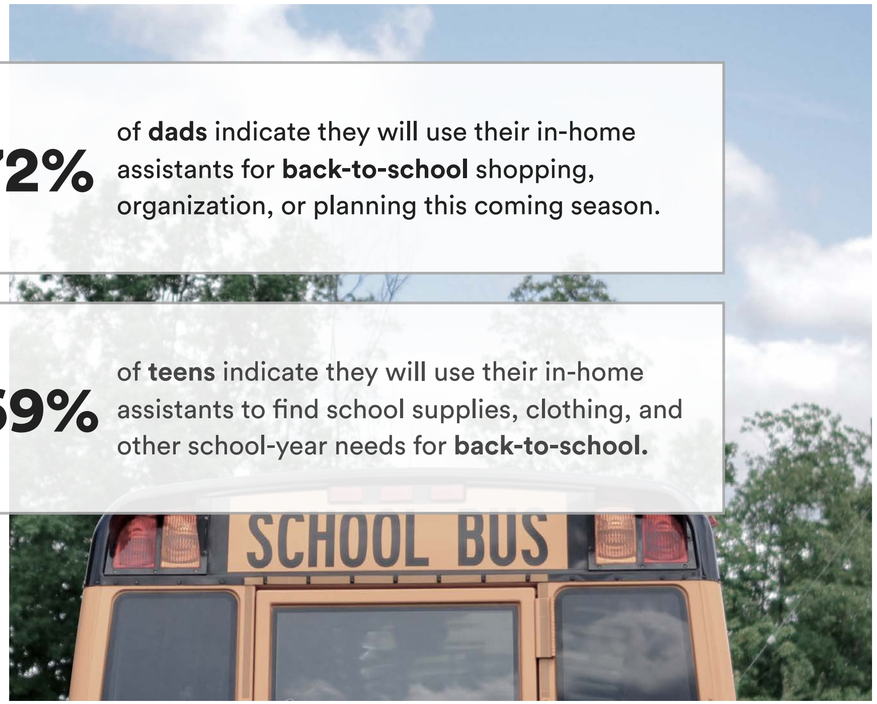


KEY TAKEAWAY NO. 4

THE SCREEN WILL FUEL SHOPPING; TRAVEL AND WELLNESS ARE NEXT TO BREAK

While voice commerce is still in its infancy phase, with 22% of respondents actually buying on their in-home assistant, a path-to-purchase where consumers are using smart assistants to make commerce decisions is here. Specifically females who are 18–24-years-old have the highest propensity to actually make a purchase or reorder a product using their in-home assistants, while Gen X is most likely to rely on their devices to help them find brick-and-mortar retail locations, utilizing the technology for location and store hours. We also found research and discovery extremely high around major shopping tentpoles, and increased ordering around the holidays:

BACK-TO-SCHOOL



72% of **dads** indicate they will use their in-home assistants for **back-to-school** shopping, organization, or planning this coming season.

69% of **teens** indicate they will use their in-home assistants to find school supplies, clothing, and other school-year needs for **back-to-school.**

Q4 SHOPPING AND HOLIDAYS

60% of all respondents plan to research products for themselves and others on their in-home assistants this holiday.

40% of **35–44-year-olds plan to buy** gifts for others on their in-home assistants this holiday.

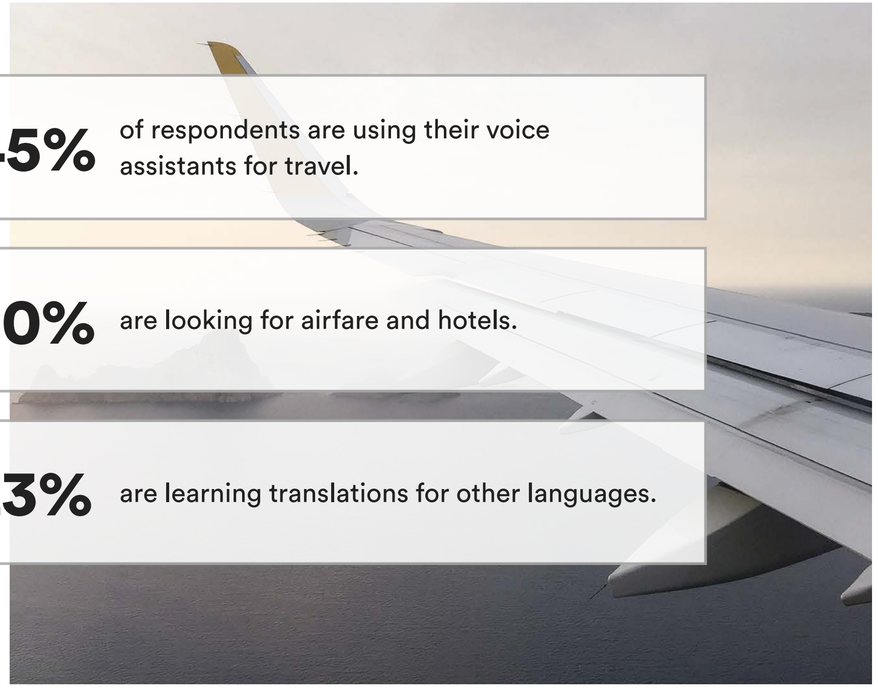
> *"If you don't have a voice assistant strategy, prepare to be forgotten. It's impossible now to not get involved—because if you're not involved, somebody else decides what your message is. You'll need to not only be available, but also more than a commodity."*
>
> *—Adam Marchick, CEO of Alphine.AI*

KEY TAKEAWAY NO. 4

THE SCREEN WILL FUEL SHOPPING; TRAVEL AND WELLNESS ARE NEXT TO BREAK

While shopping grows and evolves in the space, **it's travel and wellness that are next to be voice-ified.** Through our study we found immediate use cases as well as wants and desires:

TRAVEL

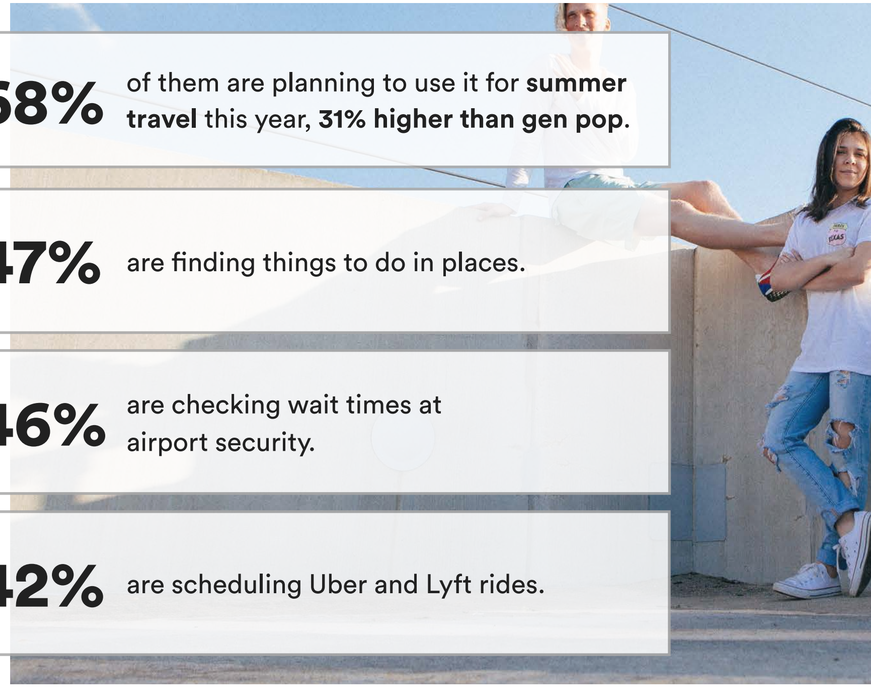


45% of respondents are using their voice assistants for travel.

30% are looking for airfare and hotels.

23% are learning translations for other languages.

TEENS SHOW THE GREATEST PENETRATION:



68% of them are planning to use it for **summer travel** this year, **31% higher than gen pop.**

47% are finding things to do in places.

46% are checking wait times at airport security.

42% are scheduling Uber and Lyft rides.

"I think it would be very useful when you're traveling in unfamiliar areas."

"Travel is a perfect fit because it could completely change the experience for a lot of people."

KEY TAKEAWAY NO. 4

THE SCREEN WILL FUEL SHOPPING; TRAVEL AND WELLNESS ARE NEXT TO BREAK

Across all categories, health/fitness was the category in which consumers said brands are best suited to have voice capabilities. As health/fitness expands into wellness, this has larger implications.

WELLNESS

42% of all respondents reported using their device for **cooking.**

89% of respondents feel comfortable sharing their **personal health** with their in-home assistants.

30% of multicultural Gen Z and Millennials use their in-home assistants while working out, 48% more than gen pop.

"I can picture voice helping you be more motivated to finish your exercises and do actual workouts."

"The voice assistants can act like fitness trainers in some circumstances."

"I think fitness might benefit from the voice space; Alexa could answer phones and book classes."

"With fitness it could be like having a personal trainer without having an actual person there."

KEY TAKEAWAY NO. 4

THE SCREEN WILL FUEL SHOPPING; TRAVEL AND WELLNESS ARE NEXT TO BREAK

IMPLICATIONS

BEAUTY HAS THE MOST TO GAIN FROM THE SCREEN

While brands will soon need to think about content in an even more agnostic way, creating web-based video content that can be fed into screen devices, beauty brands should be thinking about this most. Tutorials, how-tos, and DIY videos lead in category influence, and once voice gets to a place where product matching can be personalized (think L'Oréal app), consumers will be able to see unique nail art, red carpet makeup looks, and wacky hair trends as they happen.

SUGGESTIONS TO BUY SHOULD BE WOVEN INTO SKILLS

Retailers like Zara and Nordstrom should focus on building skills that make it easy to purchase and repurchase products and eventually build assistants that look for recommended products or discounts. With the voice strategy should come proactivity, and, eventually, evolution into true shopping assistants.

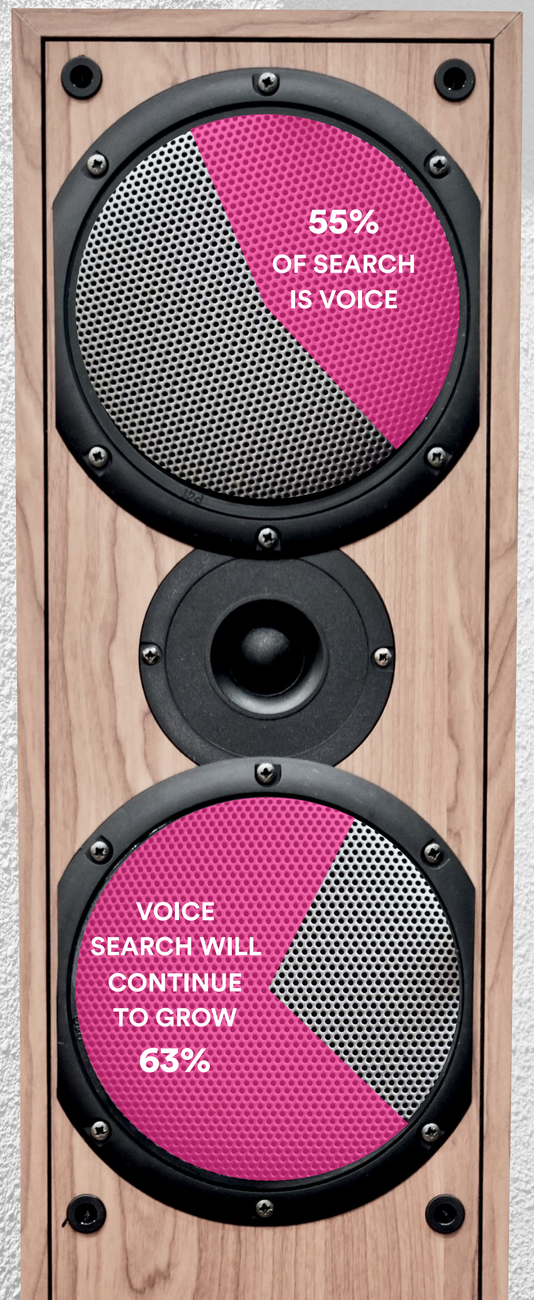
TRAVEL AND WELLNESS HAVE THE MOST TO GAIN RIGHT NOW

Travel and wellness brands, as well as publishers and influencers, should be giving voice as much consideration as they are other channels like social, as the skills space is massively untapped. For travel brands like Travelocity or *Travel + Leisure*, they could provide the newest vacation spots or adventures as five-minute stories. For hotels, it's time to ditch the iPads in rooms and replace them with voice devices to start learning.

Wellness brands like Goop or Pressed Juicery should move even faster, given that they aren't inherently visual the same way fashion and beauty are, so the category lends itself really well to the existing explanation format. The power for wellness brands will be in becoming true spiritual assistants, having cosmic impact in consumers' lives: asking users how they are feeling after they have booked a fitness class or went for a long hike, or asking about their sickness after they've ordered Advil.

KEY TAKEAWAY NO. 5

BY 2020, 60% WILL BE HEADS-UP SEARCHING



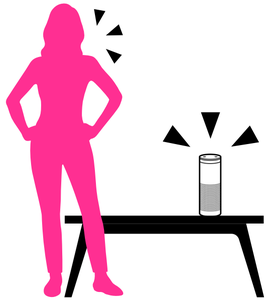
Search can ultimately be compared to history and human behavior: When we were cave people and hungry we would crawl out of our caves and search for food. Voice search, originating on mobile devices and moving to voice devices, makes searching very easy. Voice search is exploding because of the alignment of searching and convenience, and speaking your query is much more convenient than typing, especially if your hands are full or if you are multitasking.

We've all seen the headlines: "In 2020 50% of all search will be voice." What you haven't read is that the time is already here. Among in-home assistant users we found that 55% of their search is voice, with 45% remaining in typing search. Voice search will continue to grow, as 63% anticipate they'll increase voice search over the coming year. Teens are really driving this projected growth, as 78% of current users indicate they believe they'll be using voice search more in 2019 and 71% predict they will use typing search the same amount or less in the coming year.

KEY TAKEAWAY NO. 5

BY 2020, 60% WILL BE HEADS-UP SEARCHING

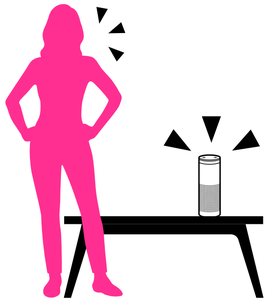
In 2018, it's been a mix of heads-up and heads-down when it comes to voice assistant interactions. Assistants can only get users so far with the voice interface, and eventually users are forced to put their heads back down and reach for their phone to finish the task. When the task becomes too personalized or complicated, the voice discussion ends. We project this moment will soon change. Once the screen is fully immersed within the voice ecosystem, categories like beauty, design, and travel will be propelled like never before as users are able to share, see, and engage with their assistants visually. At this moment, we believe that voice search will grow to 60%. As the devices get smarter and recognize questions beyond simple exchanges and commands, we will be entering a full heads-up era. Heads-down moments will be fully extinct in 2025, and we will officially be a part of a heads-up world.

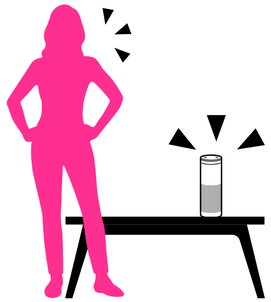


Q: How long will it take me to get to 40 Broad Street?

A: 40 Broad Street is 20 miles away. It should take you 35 minutes.

Google Maps: Traffic on route. Should take 57 minutes.





Q: What's the best dish at Pier 6?

A: Most popular dish is the lobster roll.

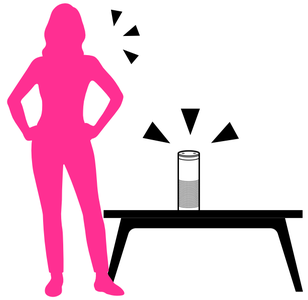
Q: Book me a table for two tonight at Pier 6?

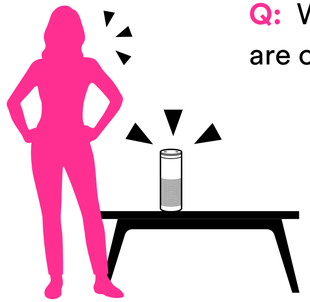
A: I cannot do that.

Goes to Open Table to make a reservation.

Q: What is the most hydrating lip tint?

A: Neutrogena Hydro Boost





Q: What shades are offered?

amazon echo show

KEY TAKEAWAY NO. 5

BY 2020, 60% WILL BE HEADS-UP SEARCHING

IMPLICATIONS

PUSH FOR DATA AND MEASUREMENT

Right now brands are unable to differentiate searches between devices (e.g., Google/Alexa) and search (e.g., text search/voice search). Google has publicly stated they will give webmasters data voice search queries related to their own content but has not provided a date for this yet. It's up to marketers to continue to stress the importance.

MEDIA PLANNERS NEED TO CONSTANTLY EVALUATE WEBSITE TRAFFIC

The rise of voice search will reduce traffic to websites and therefore reduce advertising revenues. By 2020, 30% of web browsing sessions will be done without a screen, so this is something that media planners will need to stay on top of.

SOON EVERYTHING WILL LISTEN

As you start to incorporate voice activations into media, do not think of voice as a siloed component of your media plan. What we know as voice assistants will soon become obsolete, as voice technology will soon power the consumer's world.

REMEMBER THE HUMAN IMPACT: VOICE REQUIRES CONSUMERS TO USE THEIR BRAINS AND THEIR MEMORY

The biggest change in voice search versus text search is that it changes the parts of the brain we use to absorb information. When you use text search, you're able to refer back to the thousands of results without thought. With voice search, you have a limited list, and that list, comprised of things like a recipe or subway schedule, has to be retained in your short-term memory.

LOOKING AHEAD

HAVE YOUR RESPONSES READY

Marketers are hyper-focused on hijacking the conversation to be a part of cultural moments like the Super Bowl. As brands get into the limelight they will no longer be able to rely on PR to form responses. What could Starbucks say about their gender pay gap announcement last month? What questions are consumers asking that your brand does and does not have answers to?

SOCIAL TRUST WILL BECOME KNOWLEDGE TRUST

We know that consumers no longer trust traditional advertising, and influencers and social media are the last ones standing. As trust for voice grows, this will likely diminish the role of social, and potentially even people. Brands have the opportunity to participate in what will soon be one of the only remaining trusted mediums. Have a question? Intelligent chat systems are always ready to talk.

VOICE RAISES THE BAR FOR CONTENT

Voice content is a not forced interactions or pre-roll that audiences have to watch. To get them to come back to your skill, your content will need to be extremely compelling, and it must hold up and continue the conversation. Ask yourself, can this piece of content live if it's only consumed via audio?

PREPARE FOR THE DEATH OF THE IP ADDRESS, AND MORE FRAGMENTATION IN MEDIA

Voice technology has jumped beyond the device, connecting to the home, and will eventually connect to environments. What will happen when consumers move away from their desktop and mobile devices in favor of voice and recognition becomes stronger and moves across households?

SPONSORED OPINIONS WILL BE THE NEW SPONSORED CONTENT

As voice devices grow, we can expect advertising opportunities to arise. As an example, let's say audiences are debating about politics as a group and turn to Vice to answer their question—expect brands to try to become a part of publisher opinion, brought to you by "name that brand."

OUR CHALLENGER POV

THINK OF VOICE AS YOUR INSIGHT CREATOR

Don't think about voice as a tether to the device that manufacturers make. Free your mind of the device, the technology is your tool. This technology is the only one out there that can go under the hood with real-time data and real-time moments. Voice can be your insight creator because of its use and utility. Start with your output of what you want to know, and write it from the inside out. Call us creepy, but here are a few examples:

AN AT-HOME DRESSING STYLIST

that can make suggestions as consumers try on the latest looks just delivered to their home, providing helpful fashion cues and gaining direct customer feedback.

A NEW-SCHOOL WAY TO FLY

where voice can act as an-flight entertainment catalogue and bartender during the plane ride, and potentially aid in destination recommendations based on trending activities and consumer taste.

BARISTAS TURN COUNTER COUTURE

at QSR restaurants by personalizing customer orders gleaned via license plate recognition, and going deeper by connecting mood triggers with facial recognition.

A HUMAN ANSWER (WITHOUT THE HUMAN AWKWARDNESS)

in places where people need it. Think the feminine care aisle, or the car dealership without human judgement or emotions, giving brands a real, unashamed way in.

A BEAUTY GURU

who embodies real inclusivity and can elevate the static makeup counter into a carefully crafted vlogger who knows the needs of as many skin- and hair-care types as possible.

THANK YOU