The Future of Voice in Entertainment

A future where content finds consumers 🎤

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Anticipating a disrupted media landscape

We're in the golden age of peak content. From the big screen to the small screen and every screen in-between there is more high-quality content available than ever before. And the content arms race seems to have no end in sight – the top 10 media and technology companies alone will spend $50 billion dollars on original content this year – much of which might never find the right audience.

While content creation is exploding, the means of distribution is splintering and re-aggregating in a way that makes it increasingly difficult for people to discover, experience and consume it.

Overwhelmed by choice, confused as to what service offers what content, and inundated with marketing messages, consumers are ripe for a better way to discover and experience content tailored for them.

Voice presents a future where the right content finds consumers: cutting through the clutter with accuracy, contextual relevance and curation. This research deep dives into consumer benefits and need states for Voice Assistants in the content space, and provides a framework for achieving engaging user experiences that leverage voice AI's unique advantages.

ENTERTAINMENT DRIVES SATISFACTION WITH VOICE TECHNOLOGY

>7 in 10
users want a device to know their taste and to recommend relevant content for them

The benefits that drive satisfaction with the device are linked to alleviating the friction in finding and playing content consumers want. Search is a huge challenge when it comes to content discovery, and more than 7 in 10 users want a device to know their taste and to recommend relevant content for them.

Out of a large array of possible benefits, the benefits that drive satisfaction with voice devices are the ability to find and play content easily and quickly, and the ability to make relevant content recommendations. Of the available entertainment and media voice skills in the marketplace, the skill most likely to drive satisfaction in a Voice Assistant device is the ability to provide personalized TV and movie recommendations. However, this action represents significant opportunity since only 6% of those who use entertainment skills on their Voice Assistant device use it to curate their content.

Consumers are interested in the device playing a more active role in driving the media and entertainment experience. When it comes to discovering new voice skills, word-of-mouth is currently the primary method for discovery, whereas the preferred method is to have the Voice Assistant inform users about new skills to try.
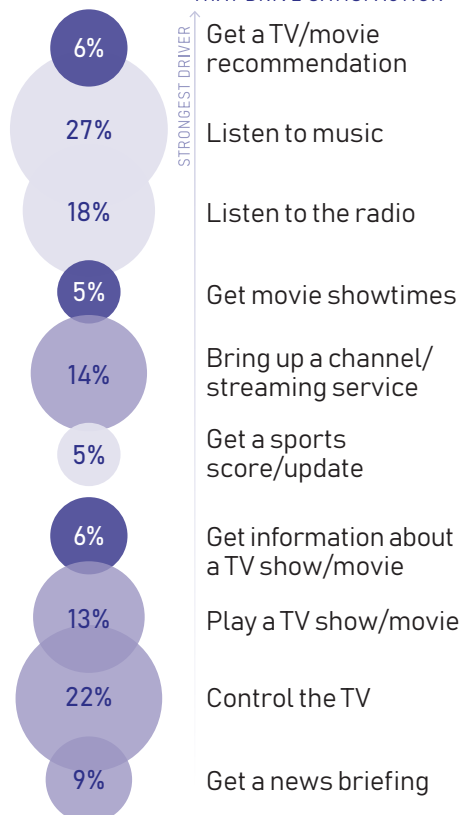
CURATION CONTROL CONTENT

USE RATE | **FUN + ENTERTAINMENT ACTIONS THAT DRIVE SATISFACTION**

STRONGEST DRIVER

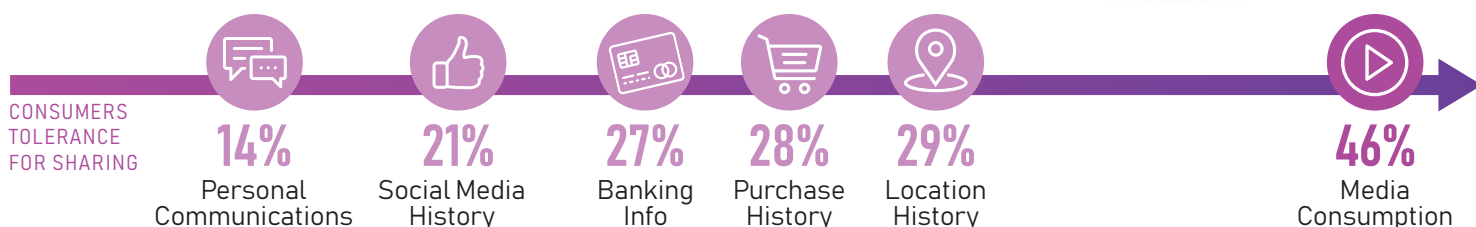| Use Rate	Action
6%	Get a TV/movie recommendation
27%	Listen to music
18%	Listen to the radio
5%	Get movie showtimes
14%	Bring up a channel/streaming service
5%	Get a sports score/update
6%	Get information about a TV show/movie
13%	Play a TV show/movie
22%	Control the TV
9%	Get a news briefing

Consumers are willing to share to enhance the media experience

2 in 3 people are willing to share some form of data with their Voice Assistant to enhance their media experience. There is approximately double the willingness to share media consumption above other forms of consumer data, such as personal communications, social media behavior, financial information, purchase behavior or location history.

Trust belongs to content brands who have "earned" it through repeated relevant recommendations. 2 in 3 people would be willing to link their favorite brands to their device, with Netflix, YouTube and Spotify ranking highest due to past effectiveness in recommending relevant content.

NETFLIX ▶ **YouTube** **Spotify**

CONSUMERS TOLERANCE FOR SHARING

14%	21%	27%	28%	29%	46%
Personal Communications	Social Media History	Banking Info	Purchase History	Location History	Media Consumption

Decoding desires and speaking to future behaviors

When mapping the hierarchy of consumer preferences for future entertainment voice actions, more than 8 in 10 of consumers desire actions that would help them consume more content (record my favorite show, remind me to watch something on my watchlist) and proactively inform them about their favorite media (give me live/breaking news about the TV shows I've told it about, tell me when a new game has come out).

% WHO WOULD PREFER TO BE **PROMPTED** FOR THESE TYPES OF ACTIONS		UNPROMPTED	NEVER DO
CONSUME	52% "RECORD MY FAVORITE TV SHOW"	36%	11%
INFORM	56% "TELL ME WHEN A NEW TV SHOW/MOVIE/GAME HAS COME OUT"	28%	16%
INTERACT	54% "SEND A RECOMMENDATION OF A TV SHOW/MOVIE/ GAME TO A FRIEND"	14%	32%
PURCHASE	51% "RENEW MY MEDIA SUBSCRIPTIONS"	13%	36%
INTERPRET	41% "INTERPRET MY MOOD, RECOMMEND SOMETHING TO WATCH/PLAY"	19%	40%

While habit learning is valued, so-called "sentiment analysis", or other forms of ambient computing, require more acceptance. Fewer than 1 in 5 are willing to let their Voice Assistant collect interpretive data unprompted as a basis for recommendations of what to watch or play.

Perfecting the privacy and personalization paradigm

While consumers want their "assistants" or smart speakers to have a certain degree of autonomy and to take initiative in providing them with an enhanced, more efficient user experience, privacy issues cause concern. 3 in 4 people are not comfortable with the device "always listening," and this is also the number one holdback among non-users. A voice UX that offers personalized content and features a trustworthy privacy mode satisfies 60% of the market.

2 in 3
people will share data with their Voice Assistant to enhance the media experience

VS

3 in 4
are not comfortable with their device always listening

Voice AI's echo across the broader media ecosystem

Smart speaker users are hungry for content—consuming 5% more content hours than non-users. Smart speakers are diversifying users' media diet, with users consuming 8% less TV and listening to 5% more audio content than non-users. Still, screens are not going anywhere. The vast majority of consumers want their favorite media brands to have an integrated voice experience that works with the screens they're already using, especially when it comes to video-only brands like YouTube (84%) and Netflix (80%). Among older audiences, connecting to a TV is crucial, and across all audiences, the TV screen is still the preferred format for a lean-in viewing experience.

When designing audio-first experiences, marketers must speak to the communal character of the technology. Voice is the UX and poses unique advantages for media consumers, who enjoy more shared quality time. 2 in 3 smart speaker users carry out media and entertainment actions with someone else, 60% go so far as to say that their device brings their family closer from interactive gaming to deciding what to watch.

"Voice technology, from the form factor of devices, to the underlying prediction machines that fuel them, is primed to become an integral part of the home entertainment experience," Grady Miller, VP of Strategy & Innovation, states. "The communal nature of dialogue itself, the ability to deliver highly personalized recommendations and the frictionless functionality to find and play content across platforms: voice AI is primed to be the pivotal technology for consuming all forms of entertainment."