

ALEXA, MUMMY AND ME:

NEW OPPORTUNITIES FOR KIDS AND VOICE



GAME CHANGERS



19% of adults (aged 15+) now own or have access to a voice-controlled digital home assistant device, significantly up from 14 per cent figure recorded in 2019.*

**“[we call her] Alexa Sassypants”
Girl, 10 years old**

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There has been much fanfare around voice technology over the last couple of years, and it certainly has the potential to disrupt media habits and brand interactions. Voice represents a new way for brands to speak to people and for people to speak back. Within this evolving conversation there are a huge number of opportunities, especially in the current context of lockdown and beyond. However, there are also risks for brands and organisations wanting to operate in voice that need to be fully considered.

At Ipsos, we have been tracking voice since 2017 with our Tech Tracker, a future casting study for the IAB, and (at the beginning of 2020) exploring how voice fits into family life through home immersions and self-led ethnography.

- We found voice technology in the home can **add real value to family life**. Where individual screens encourage insular behaviour, the Voice Assistant Device (VAD), **acts as a communal tech hub enabling families to share bonding experiences**.
- However, voice is **not yet a fully integrated member of the family**. There are significant **barriers to overcome** in terms of technical frustrations and maximising its potential.

It is important to consider these findings in the context of the current lockdown and most importantly, what will come after. 2020 will be a game changer for in-home technology as families spend more time at home and rely on it for different roles such as, entertainment, education and social bonding. In this context, voice technology could expand its role, and further integrate itself into family life in a way that has long lasting impact.

THE CHALLENGE OF INTEGRATING VOICE INTO THE HOME

From our primary research with families (pre Covid-19) we found that, in its current form, voice interactions with smart speakers in the home are not yet completely organic, natural or consistent. Effective communication demands clear, specific and well-structured commands which kids and parents stumble over. As 'digital natives', kids' expectations are high, making them quickly frustrated when they encounter issues communicating with their VAD (one family dubbing their smart speaker "**Alexa Sassy-pants**").

This is in part because the technology behind it (i.e. Natural Language processing and AI) is impressive, but not as smart as users think or expect it to be. Voice conversations are carried out by decision trees and numerous, complex algorithms designed by humans. As human speech is wondrously complex this makes it hard to replicate. The evolution of this technology will take time, and it is important to consider the opportunities for voice within the context of technological limitations and families ultimate desire for a seamless user experience. These technological challenges are unlikely to be resolved immediately and in the post lockdown world.


TIME, SPACE AND EDUCATION ARE NEEDED FOR FULL INTEGRATION INTO THE HOUSEHOLD

While voice is fun and convenient, its limitations and a lack of awareness of what it can do leaves many families feeling as though they could live without it.

Despite the initial excitement of purchasing a VAD, the novelty wears off quickly. Most families do not go beyond the Amazon/Google skills their VAD comes with, and few use (or even know about) the associated app. This means families rarely come across a brand's voice offering.

Users want to be made aware of different skills, but the proactivity required from parents feels too demanding.

Pre COVID-19, this created a **challenging space for brands to break through** and educate families on what voice can do. However, the current environment encourages a deeper exploration of tech, which tech providers and brands can profit from if they get it right. It is vital to **get in front of families with a set of broader use cases at this time**, so that they can be educated on the value good voice interactions can provide. Now is the time for voice to prove its worth, so that it has the best chance of becoming embedded in future (post Covid) routines.



“I don’t really feel the excitement of when we first got Alexa and we were learning new things to do with her”

Girl, 10 years old

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“Alexa is not like something you really want to have or need. But, it’s handy at times knowing it’s there.”

Parent of 8 & 6-year-old

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“Playing games with Alexa is similar to bringing out a board game”
Parent of 7 & 10-year-old

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“We skirt over the top of what we can actually do with it [so far].”
Parent of 2, 9 & 10-year-old

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VOICE OFFERS SIGNIFICANT BENEFITS FOR BRANDS TO BUILD ON

Families value in-home voice technology because it allows them to capitalise on the benefits of technology **without the addictive nature of screen time**. When using voice, kids and parents are less absorbed and can remain present and attentive at home – a vital need at this time.

For kids and parents alike, their VAD plays various roles, positively contributing to family dynamics which **brands and content providers can tap into**:

- **Comedian / Entertainer:** For younger kids, interacting with the voice is a game, which they do not grow easily bored of. Kids tend to associate their VAD with fun, laughter and play time, so it takes on the role of a personal comedian, entertainer and playmate. Parents describe how their voice assistant brings laughter into the home, telling jokes, singing songs, beatboxing and playing games with their kids. This is likely to be especially important in lockdown, where kids are missing out on social interaction and play with their friends.
 - **Teacher:** Voice provides quick and intuitive learning opportunities for kids, relieving parents from the pressure of educating their kids themselves, a vital need in these times! It's valued by parents when it can help research rather than when it provides their kids with instant gratification. However, parents are reluctant to trust the information Alexa provides because it is not referenced by source – they hope their kids will grow to critically assess rather than blindly accept.
 - **Magician:** The seemingly endless abilities of a VAD make it feel magical. This sets high expectations for everyday interactions and future scenarios. When it doesn't go to plan, the spell is broken, and kids grow frustrated.
- The exciting thing about this time of in-home immersion for the future of voice, is that families both **want and expect more from it** – they imagine genuine benefits with greater integration in the household. There are several key expectations and needs that can be built on further, to improve the voice experience both in lockdown and the post lockdown world.
- For **parents, Alfred (Batman's trusty butler)** personifies what they want from smart speakers in the future – a perfect blend of family doctor, PA, trusty companion who knows their needs/tastes inside out, but doesn't intrude. It would be responsible for making their domestic, personal and professional lives easier and taking on the repetitive, boring and complex tasks to free up their busy schedules as parents.
 - Parents can also envisage their VAD taking on the **part time role of super nanny** – with timers/reminders acting as parental backup for bedtimes/routine. This takes the pressure off parents during the school run and shifts the tiring, disciplinary role away from them. They also feel it could play more of a role in educating their kids, providing them with valuable learning opportunities from trustworthy sources.
 - **Kids** are comfortable with a much closer relationship with voice than their parents. In their eyes, voice can provide a **fulfilling friendship** as a wearable constant companion with the characteristics of a best friend. Kids want it to play with them, cheer them up, share their interests and even read their mind. If kids do develop this degree of closeness with their smart speakers in lockdown, this emotional bond is likely to carry forward into the post lockdown world.

“[Kid] but say if you’re sad, you wouldn’t have to say, “can you make me feel better”, it would just say “are you okay?”

[Mum] But would that make you feel better? If a machine is asking you if you’re alright?”

[Kid] Yes because it’s going to be like your little friend”

”



SO, WHAT'S NEXT FOR VOICE?

2020 will be an important year for voice technology in the home. Understanding its role within the current lockdown and future post lockdown landscape is vital when identifying new opportunities for brands and content providers to engage with families. Patterns that are established in this period could lead to long-term opportunities for brands and content providers.

We are already seeing brands respond to the changing environment to help support and engage families. Audible is providing free audiobooks for kids, Headspace offers free access to mindfulness resources to teachers, and Google Nest is teaming up with the WHO to roll out a new handwashing skill. However, we would suggest that much more could be done here to create deeper engagement, increase brand affinity and deal with technological frustrations across the board.

If you are a brand shaping your voice strategy, it is worth keeping an eye on developments over the coming period, but also to be mindful that voice is one channel among many; it has pros and cons and isn't right for every objective. Your voice strategy needs to be connected to your overall strategy to ensure effectiveness and must always be grounded in insight into how it can offer value to families in a fast-moving world.

We will continue to track engagement with voice in the coming months and look forward to hearing what the future brings.

*Source: Ipsos Mori Tech Tracker, GB face to face survey
Base: 1,000 GB adults aged 15+

Q1 2020 vs Q3 2019

ABOUT IPSOS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide a true understanding of society, markets and people.

To do this, we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.

Ultimately, success comes down to a simple truth:

You act better when you are sure.

OUR MEDIA EXPERTS

We are a close knit team of experts who work exclusively to help you understand the media and tech landscape. Through our work we leverage our deep understanding of people, society, and culture to make sense of audiences and how they use technology and consume entertainment. We work with integrated data sources and curated insights to contextualise your business challenges, so we are in the best position to help shape your strategy and ultimately create greater impact.

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