

THERE'S A QUIET REBELLION TAKING PLACE.
WE'RE SEEING PEOPLE START TO TURN THEIR BACK
ON THE DOOM AND GLOOM OF THE WORLD AND **FOCUS IN ON WHAT'S AROUND THEM.**

DEEPAKE

TECHNOLOGY BRINGS US TOGETHER
TO SHARE OUR EXPERIENCES
IN REAL TIME

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TRENDS 2019

MINDSHARE



THERE IS AN INCREASING SENSE OF UNCERTAINTY
IN ALL AREAS OF OUR LIVES, FROM POLITICS
THROUGH TO THE ECONOMY.

MINDSHARE FUTURES



Sophie Harding
Trends & Insights Director

INTRODUCTION

Welcome to our Trends for 2019! This report is a culmination of three months of intensive consumer-facing research and industry opinion that has identified those areas in technology, communications and culture we should be watching for the year ahead. This year we have identified five trends, covering a range of subjects from voice and the connected home to livestreaming and virtual beings.

Our trends always offer something different from other industry reports, with the extensive nature of our research getting right to the heart of consumer perceptions, fears and desires for the year ahead. With more consumer research included than ever before, this year's trends report really puts people at the centre of thinking, delivering on our audience-first proposition for clients and unlocking growth for them in the year ahead.

So, who exactly have we been out there talking to? The trends programme kicked off with mobile ethnography and trend exploration workshops with over 120 consumers to devise the initial trends. Quantitative research then followed with more than 6,000 consumers aged 18+ across the UK, plus social and search insights to help define and size their themes. Next came expert interviews to uncover the direction of the trends and industry impact. Then finally future-scoping consumer sessions to map out how these trends could develop over the next decade.

This unique combination of methodologies allows us to identify not only the who, the what and the how many, but to get to the crux of why – the human drivers behind people's thinking or behaviour. We talk to a wide spectrum of people, representing all age groups, areas of the country, tech abilities and walks of life. This is becoming increasingly important to the programme as we now see such marked differences in opinion and behaviour, when speaking to the variety of people we meet around the UK. This approach has helped us to identify a broader underlying theme which runs through all our trends this year. You can read about the implications of this in the next couple of pages, in *A Changing Climate*.

We are still of course tracking subjects such as VR, AR, biometrics, emotion tracking and visual search, but this year in particular, we have found ourselves focusing in on other subjects that have featured in past reports, as we finally start to see significant changes in adoption rates or behaviours manifest. From a consumer perspective, it's unlikely to be a year for shiny new emerging tech, but instead a year where some of the exciting innovations we have been talking about for a few years start to embed themselves more in people's lives.

So here they are – our five trends for 2019. And remember, the thoughts in this report certainly don't end here. We will be revisiting some of these topics and other tech innovations in our 2019 Futures programme as the year progresses, so stay tuned. Happy reading and do get in touch if you would like any more information.



In a turbulent world with a climate of political extremism, economic upheaval and general uncertainty, it's unsurprising that people are feeling fearful that the future is a little out of their control. But there's a quiet rebellion taking place. We're seeing people start to turn their back on the doom and gloom of the world and focus in on what's around them. They're grabbing hold of the reins, reducing the fear and uncertainty in their lives, and taking back control where they can.

The search for truth and transparency is a symbol of this new era. People are paying closer attention to the sources they use for information, as they seek to make up their own minds about what's going on around them. As people strive for greater knowledge and understanding, they find it easier to see how positive changes can be made, which inspires them to take action in their own lives.

This is not about dramatic life-changing decisions, but smaller everyday choices that lead to a more conscious way of living. In 2018, we've seen people embracing exercise, cutting down on vices, eating healthier, and wearing less or no make-up – some, for the very first time.

It's not just about the body either – whether it's taking the TV out of the bedroom, so the day doesn't start with bad news, or choosing to spend less time on social media, people are letting go of the things that get them down and embracing more of what makes them happy. Their focus is shifting back to what really matters – genuine relationships. Whether seeking to connect locally in real life, or globally through technology, they want to share their experiences with like-minded people and communities to feel part of something bigger.

Within the current climate of uncertainty, any difference they can make, even if small, makes them feel empowered. Volunteering, donating clothes, or going plastic free are ways to give back, and display kindness and humanity in a reality which feels increasingly brutal.

This search for authenticity, realness, and genuine connection is the underlying theme woven through our trends this year:

Whether physical or online, in **Live & Kicking**, technology enhances 'live' moments, strengthening our relationships with our loved ones and fostering new connections with like-minded people across the world.

Look Who's Talking explores how technology enriches the spoken word, to bring a level of intimacy, emotion and personal connection not offered by any other medium.

In **Mindful Media** we see people getting back in the driver's seat, as they seek greater knowledge and understanding of their media choices.

While in **Seconds Saved** processes are smoothed to ease friction in our lives and our minds, freeing up time to spend on the things that truly matter.

Finally, people are re-evaluating how they feel about the blurring of the real, fake and virtual in **Real or Replica**, and in some cases, choosing the virtual option. In a world of growing mistrust, by being genuinely fake, they are at the very least – transparent.

What's clear is that this need to get back in touch with the authentic and real is not at odds with the modern world. We don't need to go back to the pre-social media days of the 20th century to find genuine connection, kindness and truth.

As we evolve our thinking and behaviour to shape a better future for ourselves and the world we love, the idea of a tech free world is definitely not what people have in mind. The way they see it, technology is here to support our rebellion – in both the real and digital world.

Tech is good.

TRENDS OVERVIEW

06 **live and kicking**

'Live' moments are very much alive and kicking, as technology brings us together to share our experiences in real time.

24 **look who's talking**

The rapid adoption of technology and the spoken word to enrich our lives.

42 **mindful media**

The rise of the more conscious media choice.

60 **seconds saved**

Tech helping our lives run more smoothly, saving us seconds on every-day tasks.

78 **real or replica?**

In a world of growing mistrust, where tech is presenting us with curated social media, fake videos, voice assistants and virtual entities, people are re-evaluating who is real and who is not

WHAT IS IT?

live and kicking

‘Live’ moments are very much alive and kicking, as technology brings us together to share our experiences in real time

WHERE HAS IT COME FROM?

With the rise of digital, we are increasingly demanding things on our own terms – wherever and whenever we want it. However, there still remains an enduring human need for things happening at a specific moment and playing out live. There is much in human nature that can explain this. The rise of the experience economy is obvious. In a world where we now cherish experiences as much as possessions, it is no surprise that these live moments matter for people. They provide us with excitement, energy, exclusivity – these are one-time only opportunities that make us feel we are living in the moment, whilst at the same time, tap into our fear of missing out (FOMO).

Importantly, live moments also make people feel part of something and connected with the world around them. Live experiences have often had a social dimension, but technology is now enabling people to connect, share and interact around these experiences more than ever before. 34% of those we surveyed post comments on social media at least monthly about the shows they watch, or events they attend, rising to 51% for 18-34s. Iconic live moments of this year such as the Royal Wedding, Glastonbury and the World Cup were all extensively watched, shared, commented on and interacted with online. Brands are fighting for the rights to live content, and live sports, concerts, theatre and cinema are in all in rude health. Livestreaming figures are booming and live gaming is on the rise. People still want things in real time. Rather than digital diminishing the importance of live, it is in fact strengthening it – enhancing how we experience live moments.



HOW IS IT DEVELOPING?



There are so many spaces where we are seeing this new evolution of live, but we want to focus here on three areas in particular:

LIVE TV AND SURROUNDING CONTENT

Better broadband speeds and more reliable connections, combined with a growth in connected devices, including connected TVs, is resulting in a massive shift in how we watch TV content. However, it is a simple fact that there are still massive numbers of people watching live. OFCOM reports that in the UK, we watch on average almost 3 hours of live TV a day via a TV set – nearly 60% of all of our audio-visual daily viewing. Although our viewing via TV sets may be decreasing, it is increasing via other devices. Love Island is a great example of this, with almost 2 million live simulcast views via other devices, in addition to a live TV audience of 3.9 million for the final.

Emotions evoked from live viewing are now often shared and expressed via social media, creating a whole host of new content and enhanced experiences around some of our biggest TV moments. We are now starting to see new shared viewing apps come to market. Different to apps of the past such as Zeebox, people can now watch a video at the same time as sharing their thoughts and opinions, all captured in one app on their smartphone screens – providing us with a new way of viewing together in real time. Platforms such as YouTube, Facebook and Twitter have also moved into this space by upping their investment in content that can be watched live on their platforms and commented on. Not only are we using our devices to comment in real time, sharing chat, images and memes, we are also using them to vote on things as they happen, or search for related things as we are watching, such as featured clothing, scores or player stats. Live has reached a whole new level of interactivity. New players to the TV market are emerging in the big digital companies that are well matched to this new world of sharing, interactivity and livestreaming via multi devices. Amazon and Facebook in particular have been investing heavily in live content this year, particularly sports.



Twitter is kicking more sports to its social service, in a three-year deal with Major League Soccer that will include a slate of weekly programming including at least 24 live matches per season.



LIVESTREAMING

Video streaming is predicted to be worth \$70 billion by 2021 and live video streaming in particular is set to play a big part in this forecast. It's been on the radar for a good few years now, but is finally hitting the mainstream, already overtaking the growth of other types of online video. Specialist livestreaming platform Twitch, owned by a subsidiary company of Amazon, has been around since 2011 but has now grown to be one of the biggest livestreaming sites in the world. Livestreaming is now a mainstream proposition on social platforms too, with people using integrated livestreaming options including Facebook Live, Snap live stories, Periscope, and Instagram Live and IGTV in their droves. Not only are these platforms investing in their own livestreamed content, but they are also making it easier for others to livestream content too.

Interestingly, we are seeing a large amount of live UGC (user generated content) video moving to more private platforms like WhatsApp and Snap, and the more public networks investing in professionally produced content of their own, where there is more opportunity for advertisers. Brands themselves are also embracing livestreaming wholeheartedly as a new form of marketing and e-commerce, successfully integrating it into their owned media channels and

using it for everything from expert advice and product demos through to customer Q&As'. A good strategy since almost a third of people we surveyed said they would prefer to see a live video from a brand, rather than a post from them on social media. Many companies are finding that live video is delivering more emotional connection, engagement, shares and viewing time compared to standard video.

LIVE GAMING

Gamers are now going live in their droves too. Platforms like Twitch, YouTube Gaming and now Facebook's Level Up program are enabling people to livestream their own play, watch others and discuss in real time. This has also contributed to the rise of eSports where professional gamers compete in tournaments all around the world, with hugely captive audiences. Live quiz apps such as HQ Trivia have been phenomenally successful this year too, where people 'tune in' at specific times to compete against each other to win prizes. Whether you have been drawn into any of these live gaming crazes or not, it cannot be denied that they are encouraging people to come together around a shared passion. The incredible success of Fortnite can be attributed to the fact that it is available on so many platforms and has become somewhat of a social phenomenon, where friends can play and share their experiences live together.

IN THIS SPACE

01

Uptime Video Sharing

Google's start-up incubator Area 120 launched the video sharing app Uptime, allowing users to watch and share videos with friends in real time.

02

Twitch's Pokémon Livestream Experience

Twitch and Pokémon collaborated to livestream the Pokémon movies and TV series, which viewers could interact with.

03

Prime Football with Amazon

Amazon have secured a three-year deal with the Premier League and now own exclusive TV and streaming rights.

04

Dior WeChat Livestream

Dior have become the first luxury brand to utilise Chinese social platform WeChat's livestreaming feature to promote products.

05

MLS Tweets

Social media giant Twitter announced a three-year deal with Major League Soccer (MLS) in the US, bringing live matches to the platform.

06

Under Armour Playoff Quiz

Under Armour created an app for the 2018 NBA Playoffs called Steph IQ that went live every time ambassador Stephen Curry hit a three-point shot.

07

World Cup VR

Fox Sports collaborated with Telemundo on the 2018 World Cup to allow those with TV subscriptions to watch all 64 matches in virtual reality via their VR apps.

08

Live Who?

In June 2018, over 500 classic Doctor Who episodes were streamed back-to-back on streaming platform Twitch.

09

AR Beauty Livestreams

L'Oréal-owned NYX has announced plans to launch a livestream AR beauty service, allowing users to book sessions with real beauty assistants and test makeup using AR.

10

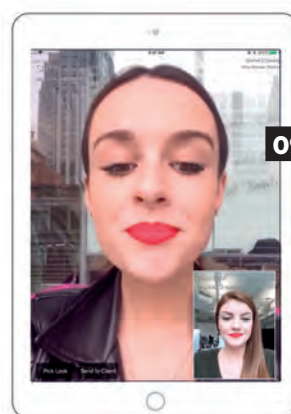
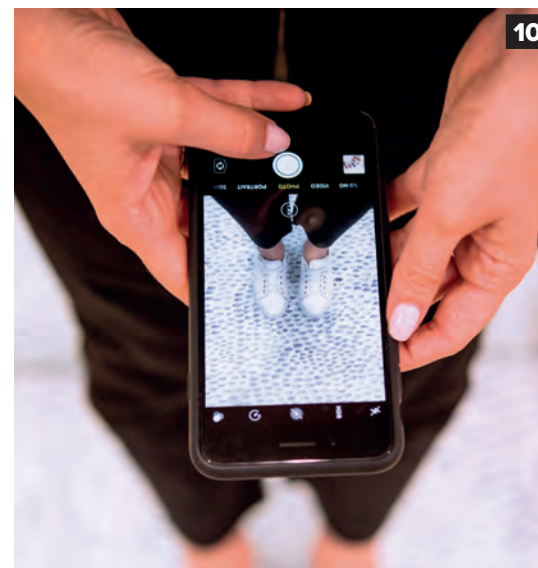
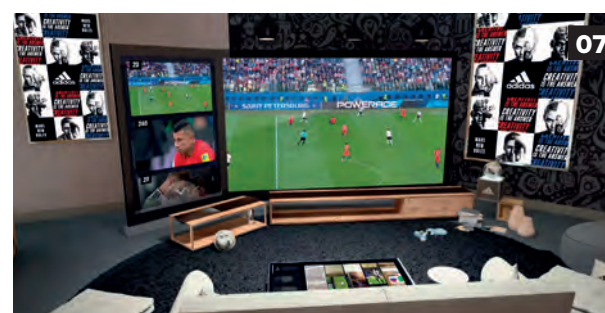
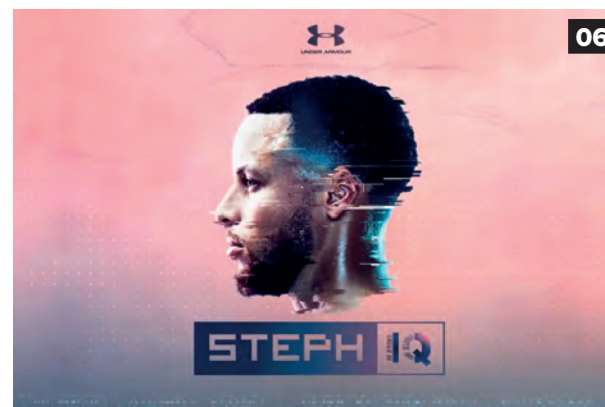
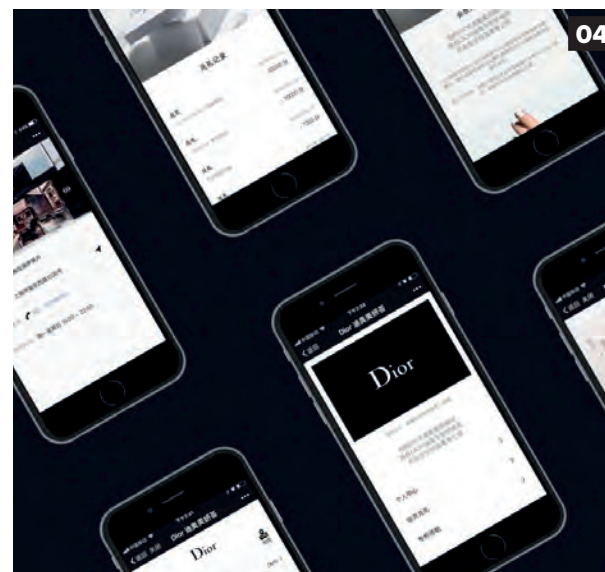
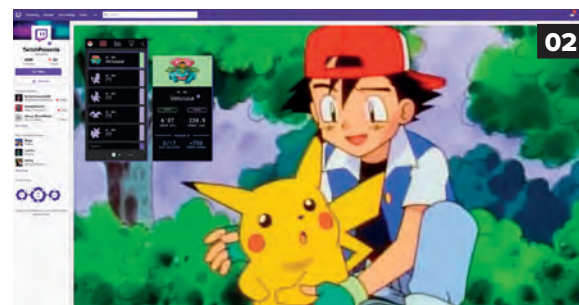
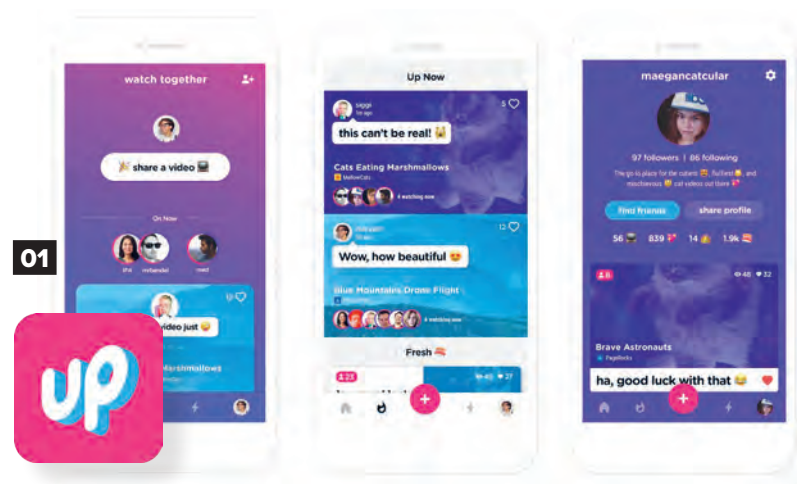
Instagram Live Style

Italian luxury footwear brand M.Gemi began previewing upcoming products via Instagram Live.

11

iFollow

A video platform allowing fans to watch football games outside of restricted broadcasting times for a small fee.



LIVE AND KICKING

LOOK WHO'S TALKING

MINDFUL MEDIA

SECONDS SAVED

REAL OR REPLICAS?

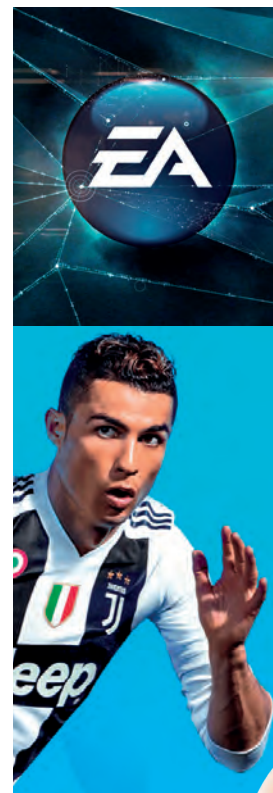


WHERE NEXT?

The appeal of live will be enduring and technology will continue to enhance live moments. When it comes to broadcast content, live viewing will likely fluctuate by device as we are presented with more screens and later, more surfaces to watch on. There will still be a role for big screen viewing, and the TV set may even see a resurgence, as we bring communities together around more shared live viewing and as audiences become even more participatory. But the role of the TV set will change.

We will move away from passive viewing as we are presented with more tools to involve us in the moment, from commenting on social media, to taking part in Q&As with experts, to additional 360-degree feeds giving us exclusive tours of sporting venues. Voice functionality will also be integrated into these tools. We will be able to see viewer interests and reactions as they happen, producing a vast array of data that brands and content makers will be able to use to optimise the right content, for the right audiences.

Livestreaming and live gaming will continue to grow at pace on all devices and may well encourage us to use our big screens more. Augmented and virtual reality will likely be built in to offer even more immersive experiences. In particular, we can see that streaming for gaming is here to stay, as big players launch new products in this space – EA's Project Atlas, Google's Project Stream Initiative and Microsoft's ProjectxCloud. Gaming is moving into the cloud and live will be a big part of this. Could we be moving towards a Netflix of gaming where titles are then streamed and played live with friends? Gaming is increasingly becoming more mainstream as entertainment, generating huge revenue opportunities for the dominant platforms.



Big events will continue to drive the success of both livestreaming and shared and participatory viewing. Companies will continue to fight for viewing rights to these. The sending of live video clips is already an intuitive form of communication for younger people, but this will become more typical as we become less worried about appearing on film or watching something that isn't quite perfect. The connection and honesty that live video provides will be its biggest draw.

Technology will offer us ways to improve the quality of live video, and artificial intelligence will have a part to play here. With an increased amount of live video content available we may start to see content aggregators that recommend what to view when, or even give us reminders for upcoming content. As technology evolves and broadband connections and coverage improve with 5G, it will be easier for anyone to livestream, anytime, anywhere and on any device.



01

EMBRACE AND EMBELLISH LIVE MOMENTS

Audience first. Look for the convergence of live moments and audience interests, then figure out how/if your brand can add or embellish the experience for them. Embrace existing behaviours, don't create new ones.

02

ASSESS THE BALANCE OF LIVE VERSUS ON DEMAND WITH YOUR AUDIENCE IN MIND

Think about the balance of media that people want on demand versus what they want live. This will vary considerably across demographics and for the live moment itself.

03

THINK MEASURING AND MONITORING

Measuring and monitoring in real time will go up the priority list. Make use of real time data to enhance people's live experiences.

04

LOOK AT CONSUMER BEHAVIOUR AROUND PAST LIVE EXPERIENCES

How have people commented or reacted during past live events? What can we learn about their behaviour? Perhaps there are common threads in this data that can inform the idea or activation of live for your brand.

05

ENHANCE AND ENGAGE

Enhance the participatory aspect of live for people – offer exclusive footage, stats and conversation alongside live events and programmes to enhance the experience. Be sure to engage with and respond to that live audience as they are consuming your live content.



06

CREATE OPPORTUNITIES TO GO LIVE YOURSELF

Are there any areas of your decision journey where going live would benefit consumers? Live presents a real opportunity to build trust and genuine connections with people, demo-ing products, answering questions, providing exclusive behind the scenes footage, giving advice in real time.

07

RETAIN BRAND VALUES

With everything happening so quickly in real time, it can be hard to stick to brand values. Ensure this is front of mind when producing any video/broadcast content or commenting in real time.

08

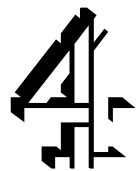
BRING LIVE TO PEOPLE THAT COULDN'T MAKE IT

There is real value in creating scarce content that is only available at a particular moment in time, but there will always be people who miss out. Think about how you bring the event to those that missed it, and how you can make this different and memorable for them.

09

HOW REGULATED IS THE CONTENT?

When placing an ad in live content, there is always an inherent risk. Advertisers should consider how safe and suitable the content and environment will be for the brand to align itself with. Regulation (or brand safety and content verification measurement) via independent third parties should be a must-have for all but the most risqué of brands.



Martin Greenbank
Head of Advertising
Research & Development

Live moments are a cornerstone of the TV industry and make up most of the minutes that viewers consume. Despite technology allowing viewers to watch anytime, anywhere, and on any device, live viewing via the TV set is proving amazingly resilient. Watching live is supported by the physical social phenomenon of shared viewing. It's just more enjoyable watching something with someone else, and this has pushed TV viewing back to the big screen and away from other devices. Commercial broadcasters are acutely aware of the disruption to viewing and their revenue models. The rise of OTT services and SVOD are creating new revenue opportunities for broadcasters but are also displacing live commercial audience volumes. Broadcasters have been adept in creating new advertising opportunities across their BVOD services, Ad Funded Programming (AFPs) and delivering innovation within their existing live airtime. The power of these are often aligned to TV's core strength – delivering impactful advertising messages to large-scale audiences over a short timeframe.



Frazer Hurrell
Creative Technologist

Livestreaming has become a huge deal on digital channels – from live sports and music events to Berkshire Hathaway's annual conference, which is livestreamed by Yahoo Finance to hundreds of countries and is watched by millions every year. As technology has improved, so has the capability and functionality of livestreaming, from infrastructure to serve the content, through to digital Content Delivery Networks (CDNs), to content overlays of info and live replays, and the advent of augmented reality in livestreams. This year's Macy's Thanksgiving Day Parade in New York saw Verizon overlay imagery of previous parade balloons through AR onto its 360-degree livestream of the world-famous celebration, giving viewers an interactive, fun experience in real time. This is where we'll see livestreaming blossom with the advent of 5G. Gone is worrying about bandwidth or buffering – this new technology will see us able to produce interactive experiences, content and capabilities in real time that we are only just starting to imagine. Take animation as an example, where there is no longer a need for hours of rendering through servers to produce cinematic animations. Instead we'll see live-action animation experiences, streamed in real time, allowing fans to interact with characters in their favourite animated worlds, through their headsets and other devices. It's going to be a whole new world of entertainment and brand experiences.



Stuart Turner
Europe COO

Live should mean exactly that – live in all cities to people at home in their living rooms. A stage presentation or a demo playable at an event in LA or Tokyo can go live to the world and shared in little more than a few clicks. eSports is almost following the football broadcast model – with a crowd attending but millions viewing from home, and with the conversations around the event worldwide. Gaming that is instantaneous, digital and box office works in the same way. In the gaming space, I'd expect to see traditional consumer shows die out, replaced by increasing number of fan-based events dedicated to specific brands but owned entirely by the publishers and developers. These are then simultaneously streamed and broadcast round the world directly to fans who can experience the digital event in the same way as they might have done a traditional consumer event, without the need to queue for six hours.



Glenn Gowan
Head of Commercial
Research & Insight

Our recent Primal Screen study highlighted that people are hungry for togetherness moments and TV has the power to satisfy this need. The success of the new series of I'm A Celebrity...Get Me Out of Here! shows that viewers want to be there in the moment, experiencing events as they happen. The show launched with 14.2m viewers across all devices, making it the biggest entertainment audience since 2010. The appetite for big TV events is alive and kicking.

Our strategy is to continue to make great programmes that bring people together, emotionally involve them and that live beyond the moment. Viewers can watch shows live on linear channels and ITV Hub. Younger viewers are increasingly use ITV Hub for simulcast viewing, as well as catch up, with programmes such as Love Island delivering record viewing with 1.3 million simulcast requests for the final. Our hugely successful programme apps enhance the live viewing experience for our viewers. In October we launched a brand new This Morning app allowing fans to get even closer to the programme. As well as clips from the show, the app will also include the opportunity for viewers to have their say on topics discussed in the programme, interactive polls and quizzes, a live streaming feature, competitions and exclusive videos, including the show's Best Bits.

ITV will be more than TV. We will be a structurally sounds integrated producer broadcaster. We will continue to make programmes that viewers love to watch across a range of genres. Creating massive TV events that bring the nation together will be at the heart of the future success of the business.



Lyndon Greenlees
Brand Partnerships Director

Brands have a hugely important role in growing this trend, which presents a major opportunity to engage millions of young people. As standard branded content and advertising fades and its efficacy wanes, sign ups to festivals and real-world experiences keep rising. Plus, content borne from such experiences keeps delivering increasing engagement rates.

Our 200+ events each year are the engine that powers our online content eco-system. Live events carry real and real time meaning for people, with communion and connection the key drivers – even if those connections are remote and online. Talk-ability and topicality are also major factors. When was the last time you were at the pub and somebody said 'Hey, did you see that awesome short-form advert video on Facebook?'. Unless it's truly exceptional, people generally don't galvanise around or eulogise about advertising disguised as content.

What people do talk about, however, is experiences and events, and they seek out the content that's generated from them. The way millennials consume and post content on their preferred social channels such as Snapchat and Instagram Stories really plays into the FOMO concept. The content is designed to showcase live experiences in real time, both giving friends a window into their experiences and presenting moments that they wish they were a part of. Brands have started to cotton onto this too. Over the past few years, there has been a major industry-wide shift towards producing branded content. The problem has been that, despite the trend moving away from ads and towards producing branded content, there has been next-to-no increase in consumer engagement, because most branded content still behaves like advertising rather than genuine content. Therefore, we are seeing brands move increasingly into the live space – a space people naturally gravitate towards and where they can share their experience with like-minded fans and followers.

EXPERT OPINION

BACK IN THE REAL WORLD

TOP 10 TAKEOUTS

01

Younger people are driving the appetite for this trend using gaming and livestreaming platforms such as Fortnite and Twitch, livestream videos, concerts and events. For older audiences it is more about live TV.

02

Londoners are more likely to engage with live viewing and events compared to the rest of the UK.

03

Whilst almost half of people claim their TV viewing is mostly on demand or catch-up, there is still appetite for watching things live, such as big sporting (World Cup) or cultural events (Love Island).

04

The fear of missing out (FOMO) is enough to make people tune into big live events (like the Royal Wedding) – watching live helps them feel part of something bigger.

05

It's not just about FOMO – people love to talk about the action as it happens, and they want to be part of the conversation. Eight in ten millennials read comments on social media about events they go to.

06

People are also keen to share their own experiences whilst at live events. Uploading photos and videos on social media or in WhatsApp groups is about sharing moments with others – not just about bragging rights.

07

Motivations for tuning into live events are mostly driven by the desire to connect with others and experience the atmosphere. Unsurprisingly, 45% find it unappealing to experience a concert or event via VR headset alone at home.

08

eSports events are more popular with men and those aged 18-34 (44%).

09

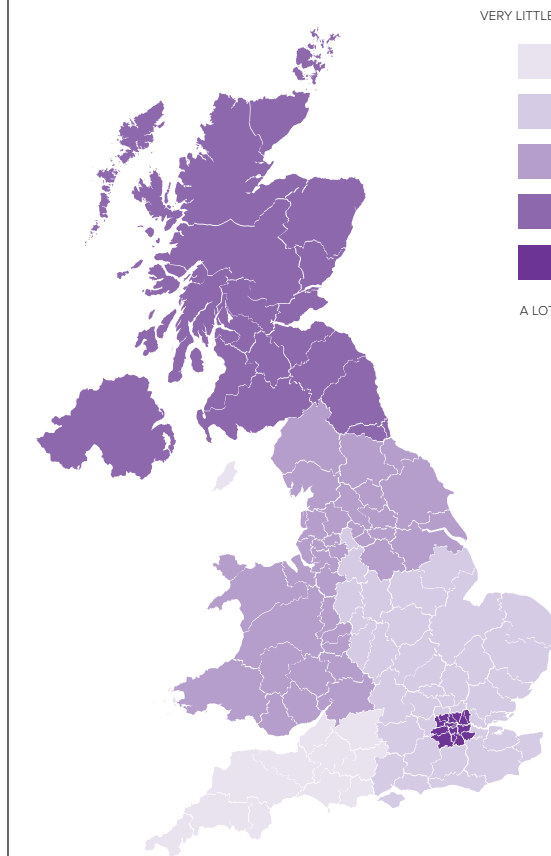
The participatory nature of live is important, with three in ten of people having taken part in a live game show (e.g. HQ Trivia), rising to over half of those aged 18-34.

10

When it comes to influencers and celebrities, livestreaming feels more real and is a refreshing change from the curated online personalities people often see. Almost half of millennials would rather watch a live video than read a post from a blogger.

LIVESTREAMED CONTENT

Consuming livestreamed content



EMOTIONS

How do you feel about where this topic could go in the future?

EXCITED
6%



ENTHUSIASTIC
10%



INTERESTED
26%



INDIFFERENT
30%



APPREHENSIVE
13%



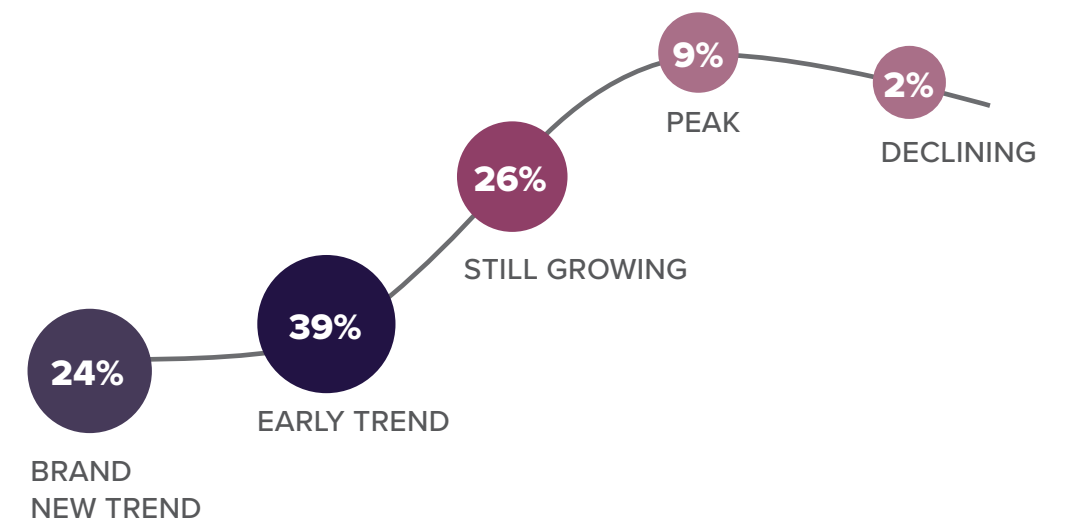
UNCOMFORTABLE
9%



WORRIED
4%



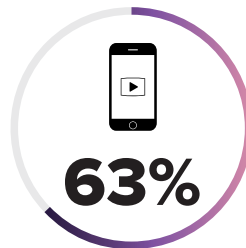
LIFE CYCLE



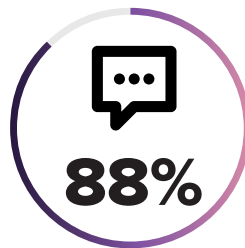
LIVE TV AND SURROUNDING CONTENT



STATS & FACTS BACK IN THE REAL WORLD



of adults have streamed live TV online – rising to 80% for millennials



of millennials read other people's comments on social media about the shows they watch or events they go to – 80% post comments on social media about shows they watch/events they go to

"The Royal Wedding was something you had to watch in the moment. Something to be a part of with the rest of the country. My phone was going crazy with Facebook notifications of how she looked, what was going on. I would have been gutted to not be a part of that."
Female, 45-54, London

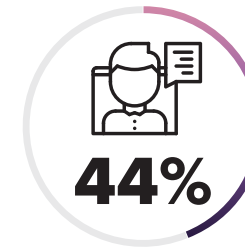


Love Island in general generated
6M
tweets

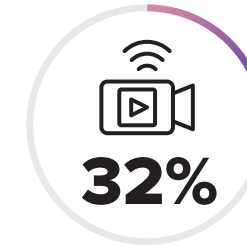
"I watched the World Cup live for the experience of doing it in sync with friends, so we could talk about it as it happened! I wouldn't even press pause, it had to be live otherwise it didn't seem real."
Male, 35-44, South West

The most tweeted moment in 2018 World Cup was Brazil's first goal, generating
170K
in 60 seconds

LIVESTREAMING



of millennials feel that when they watch a blogger's livestream, it feels more 'real'

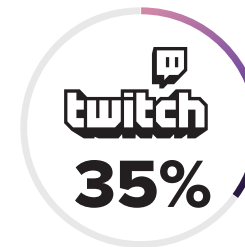


of adults would prefer to see a live video from a brand than a post from them on social media – rising to 45% from Londoners and 41% for parents

"I've watched bloggers do Q&A's live on social media...it's interesting to see how they present themselves when they can't edit. Being live is a vulnerable thing for people who want to make a whole career online."
Female, Millennial, London



LIVE GAMING



of men have watched people gaming on Twitch



of men have attended an eSports event

"My son not only loves playing Fortnite with 'friends' he's met through the game, he also spends hours watching other people play too."
Mum, South West

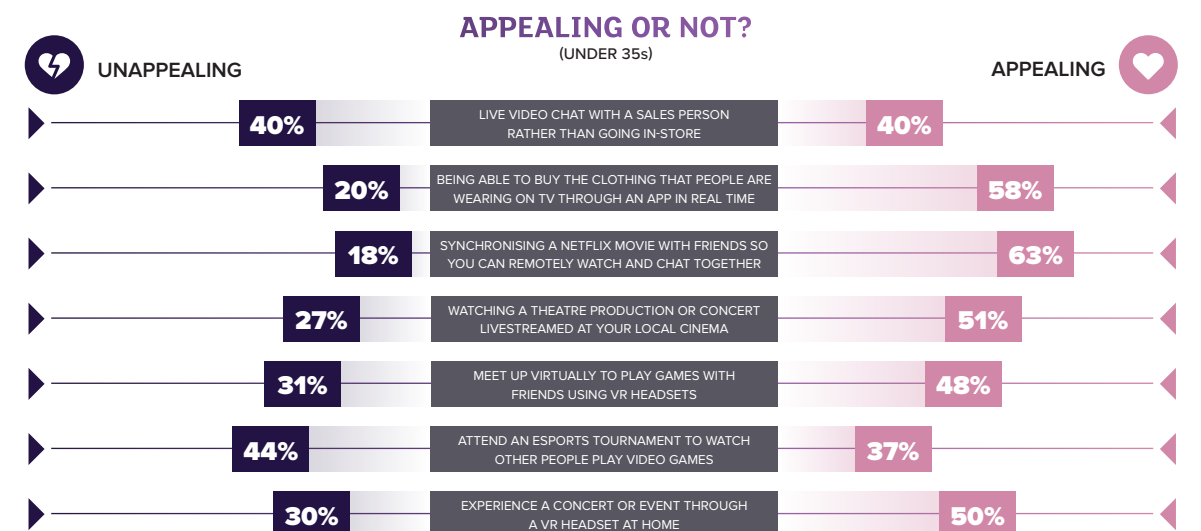
Who people play online games with

67%
By myself

33%
Random players online

30%
Friends or family
(in the same room)

30%
Friends or family
(virtually)



FUTURE SCOOPING

Those we spoke to in our research are fully embracing 'live' in many different ways – from immersing themselves in live TV content, through to livestreaming and live gaming. They are aware, however, that this is the now, and that there is room for so much potential beyond watching something live in different places to really believing they are there in real life and feeling the sensations they would feel in that moment.

34%

of UK adults think that in the next ten years, we won't leave the house as technology will bring live events to us – however, 76% hate this idea.

"As VR and AR get better you won't just feel like a guy watching a video, you'll feel like a guy who from his living room is living this experience."

Male, Gen Z, Portsmouth

"I think in ten years' time it could be very possible that things you see on TV could be completely personal to you. So, if you hate someone on The Apprentice, they'll just filter out that moron for you – even if you're watching live."

Male, Millennial, London



Consumers look forward to sharing an experience, whilst being in completely different places, by watching live event with friends via virtual reality.

Entering as Simon

Those watching content want to take it one step further and be a part of the content by entering the TV show virtually as one of the cast. Imagine walking into X Factor virtually as Simon Cowell and seeing the content unfold through his eyes.



Even more immersive, people are imagining Ready Player One style tactile bodysuits that give haptic feedback and sensations so that players can really feel a part of the game.

WHAT IS IT?

look who's talking

The rapid adoption of technology and the spoken word to enrich our lives

WHERE HAS IT COME FROM?

'Another trend about voice', I hear you say. Old news. But really, it's new news. The spoken word is our most powerful and intuitive tool. From a functional perspective it enables us to communicate quickly and effectively but also from an emotional perspective, it brings with it an added level of intimacy, emotion and personal connection not offered by any other medium. These drivers are now really starting to fuel a greater use of technology and the spoken word. Finally, we are seeing real adoption combined with a noticeable step change in people's mindsets and behaviours in this area. The

uptake of podcasts and audiobooks is exploding, the use of voice messaging is increasing, and people are starting to use the growing number of apps that can help us with text to speech or speech to text functionality. Then of course, we have the more conversational forms of technology that are being presented to us in the form of voice assistants on our phones and in our homes, which people are becoming more comfortable using, for a wider variety of tasks. These types of interactions are growing in number and are set to enrich our lives from a whole host of perspectives.



HOW IS IT DEVELOPING?

Three areas where we have seen major change this year are podcasting, voice messaging and text to voice apps, and voice assistants. Let's investigate in more detail.

PODCASTING

Podcasts have been around for well over a decade but this year are well on their way to mainstream, with around six million of us now listening to podcasts every week according to RAJAR – almost double that of just two years ago. Our research shows 37% of British people now listen, with a skew towards millennials – especially male 18-34s, where numbers rise to 61%. These figures will continue to grow, which is no surprise when you think about what podcasting offers. As humans we think in stories. Podcasts allow us to digest and remember things more easily and pick and choose our content. Lack of visuals means our imaginations can run riot. We can either absorb ourselves fully in a podcast or equally multi-task while we are listening and still learn something new. To top it off, they are free – at the moment anyway (see our 'where next' section!). Podcasting is now moving into a broader entertainment space with bigger name celebrities and TV style budgets and approaches. One of Spotify's Original podcasts recently included a \$1 million deal with Amy Schumer. Linking podcasts to popular TV shows in the UK is also working, with Love Island's daily podcast 'The Morning After' proving phenomenally successful. We will see more daily format podcasts in the news space in particular, as the big publishers jump on board. Both PwC and the IAB are forecasting that ad revenues for podcasting will double by 2020. Not only are more brands aligning themselves with the increasing amount of existing podcasting content out there, but they are also creating their own podcasts. We will see more quality content in this branded content space. Who can blame brands for getting involved, when a third of listeners say that they have purchased a product or service they discovered through a podcast.

VOICE MESSAGING AND TEXT TO SPEECH APPS

Since text messages were developed over 25 years ago, our messaging style has developed – first into shortened text speak, then followed by emoji's. But a lot can still be lost in translation when written and shortened to this extent. Now, we are going back full cycle and returning to voice to help us get our message across, just as speedily but with added feeling. This year, we have noticed a much larger contingent sending voice messages to friends and family. By a voice message we mean a recorded voice note sent within a messaging app, rather than a simple voicemail. The use of voicemail is established and universal across all age groups, but voice messaging is being driven by younger audiences with two thirds of 18-34s having sent a voice message. This is indicative of the platforms this audience are using, but also reflects a difference in mindset between generations. Older audiences are not quite comfortable with voice messaging yet, not understanding the benefits and would rather still make a phone call. As with any technology offering shortcuts there are claimed concerns around whether it is making us lazy, but this is unlikely to slow the growth of voice messaging in the long term.

We are also seeing a greater number of speech to text or text to speech conversion apps. For example, Google Go can read virtually any written website aloud in a variety of languages, allowing readers to consume web pages and articles in different ways and on the go. App Pocket does a similar thing. When we discussed these kinds of apps in our research, people of all ages were very open to using them, but many didn't know of their existence.



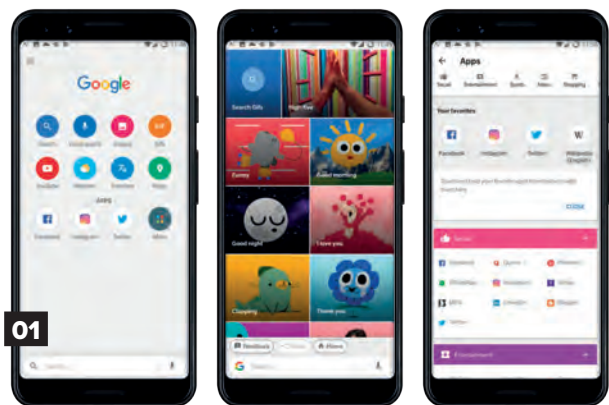
VOICE ASSISTANTS

After years of talk about voice assistants (including smart speakers) they are finally starting to play a bigger part in our everyday lives. Our research shows that 21% of the UK population now own a smart speaker, up significantly from 13% last year. And even if people do not yet own smart speakers, they have more experience of using them – 34% now claim to have used a smart speaker, increasing to almost half of under 35s. Phrases like 'Ok Google' and 'Alexa' are not as alien as they were a few years ago. For those not using voice assistants the same issues are cropping up – people can't see a use case for it, there are wider security concerns (such as Alexa might be listening in) and we are so accustomed to seeing things on screens, people struggle without this visual element. Other barriers are slowly being broken though. For example, people are now becoming more comfortable using voice technology in public.

Our qualitative research showed some quite apparent changes for smart speaker owners, compared to previous years. Over half of those that own a smart speaker say they are using it for more things than they used to. This ranged from checking the news, to carrying out searches or connecting to other smart home products (see our 'Seconds Saved' trend). Smart speakers are beginning to

play a bigger role in our home life and people are feeling differently about them. Parents in particular are seeing the effects with 47% agreeing that their smart speaker feels like part of the family. And voice assistants are indeed going to appear even more human to us, with the big tech companies investing big money and resource into doing just that. It is a difficult task to understand how we communicate via speech – small distinctions in language, tone, slang and words used, for example, but the tech companies are trying to crack it, along with the big elephant in the room, context.

But although we are seeing this significant change in consumer mindset, it is still very early days for advertisers in this voice space, with limited paid opportunities available. The tech companies are treading carefully, as they want the user experience to be at the centre of things, particularly while people are still getting familiar with using their platforms. Alexa 'skills' and Google 'actions' seem to be the most common testing grounds for brands at the moment. Fewer are thinking about their overall voice strategy. Voice may well manifest itself quicker and in a different way than brands had anticipated, and the industry as a whole will need to be prepared.



01

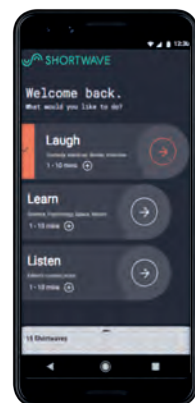


02



03

10



06



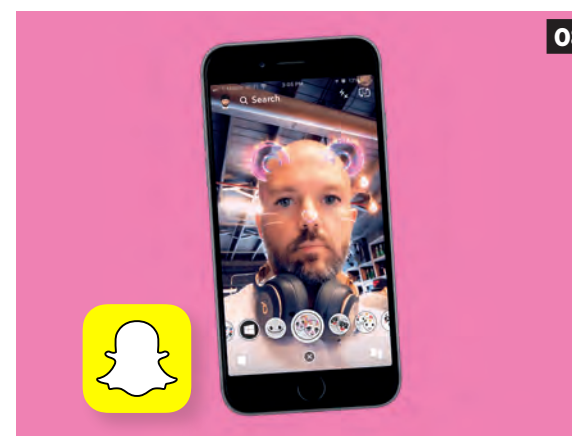
04



05



07



08



09

IN THIS SPACE

01

Google Go

Google Go can now read nearly any website to you, with the option of over twenty languages.

02

The Guardian Visual Podcasts

The Guardian US have launched visual podcasts, featuring visuals users can scroll through whilst listening to podcasts.

03

Amazon Alexa Gadgets

Amazon has revealed a variety of voice-enabled devices for every room in the house, including a microwave oven, wall clock and security camera.

04

Sensible Object

UK start-up Sensible Object have launched the first board game to feature voice augmentation. 'When in Rome', the travel trivia game, is hosted by Amazon's Alexa.

05

Google Maps in-car Integration

Google is working with vehicle giant Renault-Mitsubishi-Nissan to put Google Maps, the app store and voice assistant into vehicles by 2021.

06

Novel Effect

The Novel Effect app adds sound effects, theme music and animations to stories as books are read aloud, adapting to reading speed.

07

LingoZING App

The text to speech LingoZING app assists users in learning another language using digitised comic books.

08

Snapchat Speaks

Snapchat has introduced the first voice command-activated lenses, triggered when users mention keywords such as 'hi', 'wow' and 'love'.

09

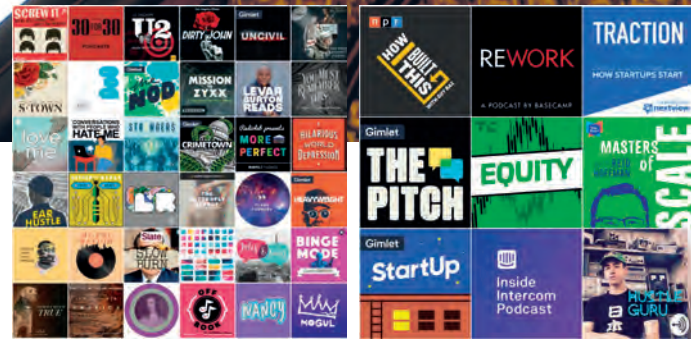
American Airlines

American Airlines launched the first voice activated in-flight entertainment service for the Amazon Echo, giving information about the flight and available entertainment options whilst onboard.

10

Google Shortwave

Google is currently developing a podcasting app called Shortwave, which delivers only personalised and relevant sections of a podcast.



WHERE NEXT?

The amount of podcast content available will increase and this will be mostly of better quality. We will see more experimentation in podcast formats and new genres, and with so much choice there will be more demand for curation to help us navigate it. Google's Shortwave App has just launched with the aim of using AI to curate podcast material but also to splice existing podcasts into shorter chunks for those short of time. Another kind of personalisation is also happening. Entale Media is creating content where listeners can engage with pictures, maps, links, quotes and other chapters for an interactive and more rewarding podcast experience. The Guardian US has launched a web-based audio platform that gives listeners extra content in the same way.

With the popularity of podcasts rising and as more quality content gets produced, it is very likely that podcasts will follow the route of music, TV, publishing and video into a subscription-based model or some form of payment for exclusive content. Content would need to be both unique and outstanding for this to happen, but

it is possible as the Chinese model shows us. What's for certain, with the greater prominence of voice assistants via a variety of devices, more people will be able to listen to podcasts in more places than ever before. There will undoubtedly be more opportunities for brands in this space.

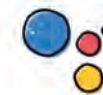
When it comes to voice messaging, we can see growth being fuelled by an extension of its use to other audiences beyond the under 35s. This will similarly be the case with text to voice apps. In our research we set our respondents two tasks – to use text to voice app Pocket for a week and to send three voice messages to friends and family. For a minority, especially with voice messaging it was just not going to be their thing and there were complaints about the robotic voice itself with Pocket. But on the whole, for those that had not used this technology before they were surprised at how useful it was and realised a number of use cases in the future. With the latest evolution of Apple and Samsung's AR emoji that allow people to send a voice note using emoji that track facial movements too, it is clear that this is just the beginning of this trend.

amazon alexa

SHOPPING THROUGH VOICE



Hey Google,
TELL ME SOMETHING GOOD.



As the concept of voice assistants becomes more familiar to people, they are finding it easier to imagine a future where voice is integrated into more devices, from microwaves to cars. The big tech companies will continue to battle it out in this space and may well play a bigger part in the other areas of this trend we have mentioned too. Google in particular are gunning for Amazon if CES 2018 is anything to go by. It will be interesting to see how Apple progresses with Siri, and see how other players, such as IBM, evolve in this space. What is certain is that devices from all of these players will need to do a better job of connecting together, for consumers to fully feel the benefit. The big areas to watch in the voice assistant space are, of course, search and commerce. 44% of people are already using voice assistants to search for things they would usually type into a search engine and this is clearly set to grow rapidly as people start to appreciate the fast and hands-free nature of the technology. Voice searches are becoming more accurate due to developments in AI

and more contextual information such as location and search history will be taken into account. Brands need to have a voice optimised SEO strategy going forward and this will continue to prove challenging until we understand more about the nuances of how people search using voice and how to navigate the different platforms' operational systems.

Commerce via voice assistants is growing more slowly, despite the efforts of the big tech companies. The majority of people are not quite comfortable yet handing over those purchase decisions to a third party, where they also cannot see what they are purchasing. The only instances where this felt more acceptable was for ordering more regular products or replacements. Having said this, voice does hold the key to a completely new world of commerce going forward. Initially, buying these replacement products will be key to making people more comfortable in this space and will be the gateway to voice becoming a dominant force to be reckoned with in the commerce model of the future.

01

AN OPPORTUNITY TO CONNECT WITH HARD TO REACH AUDIENCES

Both voice messaging and podcasts currently offer a real opportunity to connect and build trust with those elusive under 35s, especially males.

02

OPPORTUNITIES FOR TEXT TO SPEECH CONVERSION AND VICE VERSA

Text to speech or speech to text. Either way brands should be looking at what works for their customers at different stages along the consumer journey. Offering both allows for people to choose what's most useful and to suit the mood they are in.

03

RETHINK YOUR COMMUNICATIONS ENTIRELY WITH THE SPOKEN WORD IN MIND

To be truly futureproof, voice should not be viewed as another type of ad platform but rather a completely new form of communication (the spoken word) requiring a rethink of how brands need to communicate overall. Think overall voice strategies.

04

CREATE VALUE FOR YOUR USER

Using voice technology in a way that drives real value for the user, whether that's an emotional need or functional need. Understand pain points, where things could work faster or easier, or simply times when customers will have their hands full, to create useful solutions for people. Think seriously about the actual use cases for voice.



05

DESIGN VOICE EXPERIENCES THAT REQUIRE MINIMUM EFFORT

At these early stages, complicated will put people off. Be as simple and easy to use as possible to help highlight the ease of the medium itself.

06

PLAN AHEAD AND CHOOSE THE RIGHT VOICE

Much has been said about the importance of choosing the right voice. Think tone of voice, accent, gender. Deciding this ahead of jumping in will give cohesion and help to build a sonic identity.

07

INTEGRATE VOICE INTO CUSTOMER SERVICE OPTIONS

Voice and spoken messages will not replace any other technology, certainly not quickly anyway. Instead it will work alongside our existing visual and written methods. When customers want to get in touch for customer care or feedback, what are their options? Do they have to write an email? Can they call? Or even better, can they leave you a voice note?

08

THINK CAREFULLY WHEN CONVERTING TEXT CHATBOTS TO VOICE

A great idea to have chatbots that can be activated by both voice and text. However, voice and text are quite different interfaces and text is not easily converted to voice. May require anything involving voice to be designed from scratch.



Joe Copeman
UK Country Manager

From a content point of view, we will see even more experimentation in podcast formats – flourishing new genres include structured reality, scripted drama, daily shows from big news publishers and more. As podcasting becomes even more mainstream, even more diverse formats will emerge. From an advertiser perspective, a big area set to grow yet further is branded content. We will hear more and more quality branded content in the podcasting space from advertisers. We've already seen success at Acast with the likes of Land Rover, NatWest, O2 and more, and there is a real opportunity for brands to craft high-quality brand stories through audio next year. The concept of 'audio everywhere' has really taken hold. In the last year we've launched integrations with the likes of Google Assistant, Alexa, Ford and more, meaning people can listen to podcasts more readily than ever before, wherever they are. The easier access to voice becomes, the greater opportunities to listen and the bigger the audio on demand industry will be. The sky's the limit for audio creators, platforms, advertisers and listeners!



Vicky Foster
Commercial Director,
Digital

The spoken word and radio hold a deeply personal and important place in our lives, and this is rising due to technology development. It's in our car, our home, our work, our pocket and our headspace. Our listeners are increasingly turning to podcasts, which is why we're feeding this demand with our own podcast content, including The Grazia Advice Bureau, My Planet Rocks, as well as developing Empire and Pilot's podcasts. Podcasts occupy a unique space in our audiences' media habits, giving an intimate, one-on-one connection. This makes them very attractive to advertisers because of the trust and depth of connection that comes from the personal relationship between presenter and listener. Voice can play a key role in delivering a brands marketing objective and should therefore be considered far earlier in the marketing planning cycle.

In early 2018, we were the first commercial radio media owner to launch all our radio brands on Alexa enabled devices. The skills are tailored to give an interactive experience enabling listeners to ask things like, 'Alexa what's playing now?' Advertisers can hyper-target smart speaker users as well as running dynamic audio advertisements for brands (take this out) through our logged in listening product Instream. Voice interaction helps to further build brand values and personality. Research has shown that audio in marketing is more memorable than visual imagery for 60% of consumers and now that the technology exists to personalise both the editorial and advertising content that listeners hear, we believe that 2019 will be the year that brands start to embrace Voice to deliver on their marketing strategies.

Podcasts are becoming more and more popular, and are starting to move beyond the early adopter phase into the mass market. This is reflected in the increasing diversity of formats, from super-niche long form podcasts to more generalised, shorter content that can be more easily fitted into busy lives. Podcast listening is exploding on Spotify, and the level of creativity and production values is increasing alongside that. Having said that, we're still at the start of the podcast boom, and there's still so much opportunity for creative ideas. Podcasting is one of the only media where you can hold people's attention for long periods of time week after week and deliver complex, nuanced ideas in a focused environment. Podcasts are already a key part of Spotify's offering and are becoming increasingly important. To my mind they drive the same emotions and have a similar place in people's lives as music. There's something about listening to something via audio that allows you to attach your own visions and memories, and inhabit your own little world. Our ambition is to be an audio network, rather than just music, and podcasts are a major component of this. We have some incredibly exciting developments to come in 2019 and beyond, and can't wait to help push podcasts on, and see what they can become! I also expect to see increasing creativity and experimentation around episode cadence, episode length, live shows, syndication, format, and personalisation. We are starting to see this already with examples such as The Daily from the New York Times, which proved that there is a market for a daily podcast from a national Newspaper; and our own Spotify Original in Germany, "Das Allerletzte Interview", which blurred the boundaries between fiction, autobiography, and real life in groundbreaking ways.



James Cator
Head of Podcast
Partnerships
EMEA



James Chandler
CMO, IAB UK

Voice is exciting, in part, because it offers a whole new, more personal and human-like way for brands to speak to people. Increasingly, voice will also offer people the opportunity to speak back directly to brands. This new, two-way communication, opens a host of opportunities for brands.

Currently, voice tech is synonymous with building Alexa skills. As time goes on, advertisers will create new, more diverse voice tech strategies that take advantage of the different iterations of this technology. For example, creating voice enabled branded content, voice interactive digital audio ads or augmenting existing apps and chatbots with voice.

Voice tech today is also synonymous with smart speakers. As it becomes embedded in more connected devices and around the connected home (and ultimately the smart city!) voice technology will give advertisers new opportunities to reach people in new areas, at new times of the day and in moments when people simply can't use a digital screen.

In short, voice tech will make our lives easier by completing tasks on our behalf. Currently the 'brains' of voice tech devices are based on a complicated, pre-coded conversation architecture (a comprehensive set of possible permutations of the human conversation the voice assistant is trying to replicate). Because of this, voice tech will start by helping us complete relatively straightforward tasks like booking a train ticket. Over time we can expect vastly more complicated conversations to take place allowing people to use them for complex tasks such as booking an entire holiday. Voice technology will also remove some of the current barriers to purchasing, making it easier for people to buy certain products and services. A good example of this comes from Domino's Alexa skill. All people need to utter is the six words, 'Alexa, ask Domino's to feed me' and the tech takes care of the rest.



Oliver Deane
Commercial Digital
Director

Brands have spent many years considering their visual identity but very little time considering their audio identity. As more and more interactions take place on screen-less devices, where there is no visual trigger, advertisers will increasingly have to consider their brand's vocal and, more broadly, its sonic identity. Voice is a huge creative opportunity which should be embraced. We learn a lot about people by the way they sound – especially if we can't see them! Advertisers can use differences of tone, rhythm, pitch and projection to shape consumer's view of them. In a quest to get noticed, brands will need to define their personality through audio. Brands that have a familiar sound, a name that you know how to pronounce, memorable music and a distinctive voice will succeed.

We're seeing a big effect from people using voice to talk to their smart speakers, asking them to play their favourite radio station, music streaming service or podcast content. 15% of all online listening is now through voice activated smart speakers, which is tremendous growth in just two years (Midas, Autumn 2018). Advertisers are starting to produce specific creative for voice activated smart speakers – telling people that they can do tasks varying from buying train tickets to making charity donations on their smart speakers.

As voice activated devices feature more prominently in our homes and the technology continues to become more intuitive, it will create further opportunities for advertisers to work on smart digital audio campaigns. This could take various shapes: new types of short-form content for advertisers to be aligned with or the creation of seamless interactive ads on voice activated devices. The industry isn't far off from this.

EXPERT OPINION

BACK IN THE REAL WORLD

TOP 10 TAKEOUTS

01

Over a third of people have listened to a podcast before (rising to half of Londoners). The key reason people are listening is so that they can multi-task while learning something new.

02

In a world where it can be difficult to know what news sources are trustworthy, over half of Gen Z users trust podcast hosts more than traditional news presenters.

03

Trust in podcasts spills over into advertising with over a third of London listeners never skipping the ads and almost half claiming they have purchased something that they have discovered through a podcast.

04

A whopping two thirds of under 35s send voice messages, with two in five preferring them to texts. Under 35s feel that voice messages can be a more personal way to communicate, with less chance of being misinterpreted.

05

The younger generation send voice messages because they're fast, fun and convenient, but for the majority of other people, texting or calling are still better ways to communicate.

06

Almost half of Londoners feel comfortable sending voice messages in public and would happily speak to a voice assistant outside of the home.

07

Ownership of smart speakers has increased significantly from 13% in 2018 to 21% in 2019. Awareness levels of smart speakers have also increased to 80% (versus 69% in 2018).

08

Almost two thirds of families have found they are now using their smart speakers more than they used to – predominantly driven by their kids.

09

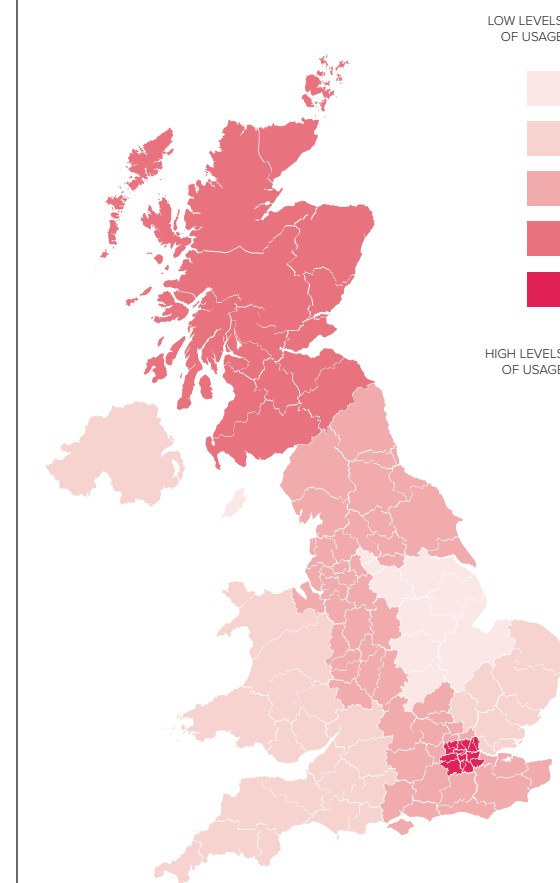
With the growing adoption of smart speakers, people are becoming more open to using voice technology built into other devices. Seven in ten can see a use for voice technology in their car, and over half of parents would like voice technology built into their oven.

10

Over a quarter of people believe that we will soon do away with voice technology completely and just communicate with our minds!

VOICE TECH

Use of voice technology



EMOTIONS

How do you feel about where this topic could go in the future?

EXCITED
5%



ENTHUSIASTIC
8%



INTERESTED
26%



INDIFFERENT
26%



APPREHENSIVE
16%



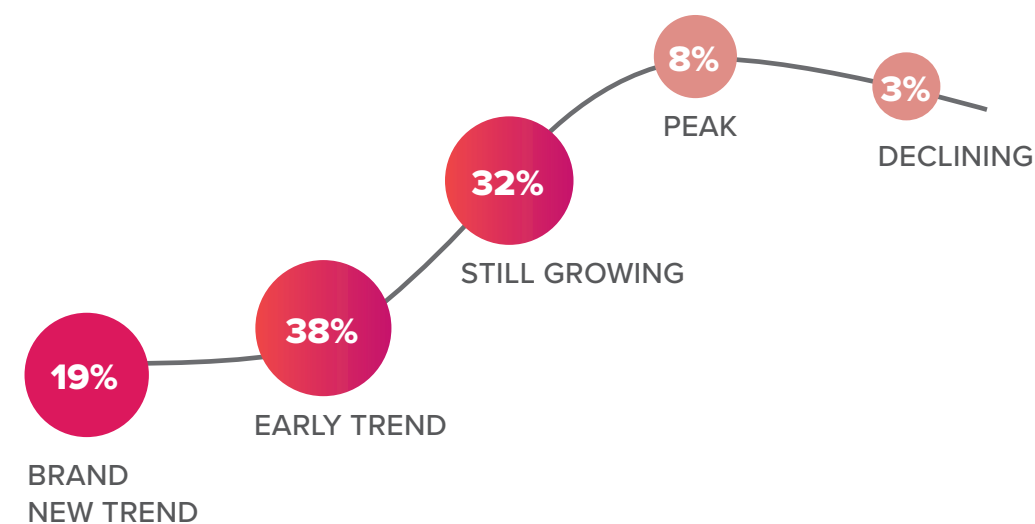
UNCOMFORTABLE
14%



WORRIED
6%



LIFE CYCLE



PODCASTING

"I first started listening to podcasts because one of my favourite YouTube personalities started doing his own one. I then found I really enjoyed listening to all kinds of podcasts from various different people and genres."

Male, Gen Z, London



31%

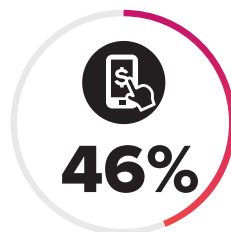
say that they tend to listen to podcasts more than music these days

"I'm addicted to podcasts. Listen to 2-3hrs of them a day! It's taken over from my TV watching habits."

Female, 45-54, North of England



trust podcast hosts more than radio/TV presenters



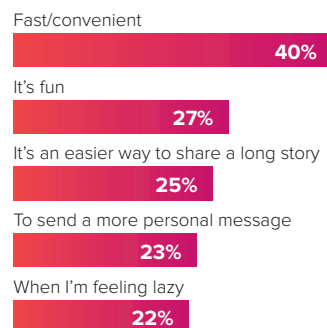
of Londoners purchased a product/service they discovered through a podcast



of Londoners trust the information they hear on podcasts more than other sources

VOICE MESSAGING

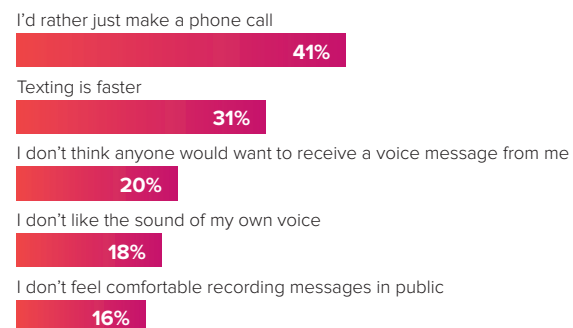
REASONS FOR SENDING VOICE MESSAGES



"I think it's laziness, we switched to texting because calling was too much effort. Then we moved to voice messages because typing a text was too much effort."

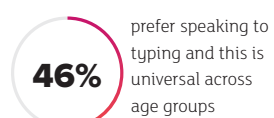
Male, Millennial, South England

REASONS AGAINST SENDING VOICE MESSAGES

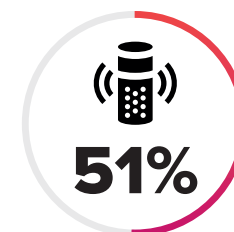


"I could see this as an improvement on texting as people can often misconstrue the meaning or tone of a text message. Far more unlikely to happen with a voice or video message."

Female, 35-44, West Midlands



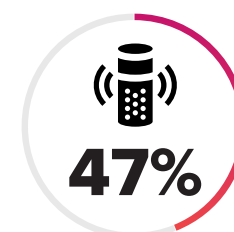
VOICE ASSISTANTS



are using their smart speaker for more things than they used to – rising to 60% among parents

"We use Amazon Prime a lot. I love the idea of being able to ask Alexa to order things online for you and have them delivered the next day! Brilliant."

Female, 35-44, South West

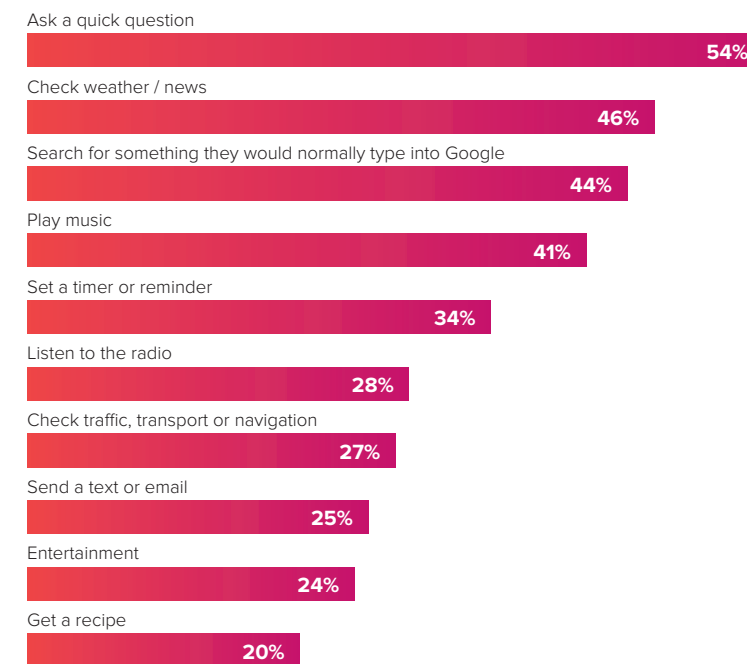


of parents agree that their smart speaker feels like a part of the family

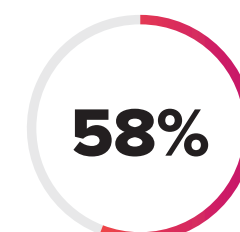
"I love the fact that she is able to do so many things and all just from talking to her. She can find and play my niece's favourite song when she gets upset, reorder the dog food, time my cakes in the oven and read a story to my daughter using Audible."

Female, 35-44, North England

WHAT ARE PEOPLE USING THEIR VOICE ASSISTANTS FOR?



VOICE ASSISTANT CONCERNS...



feel that voice assistants are making us lazy

"I think the Siri and Alexa speech is improving all the time – but it's not quite there – another few years and I reckon they will be good enough."

Male, 55-64, London

Alexa's a bit freaky though when you think about it. She's always listening, isn't she?"

Female, Millennial, South England

BACK IN THE REAL WORLD

FUTURE SCOOPING

When we spoke to people about the future for this trend, for some it was simply about voice working more seamlessly and in the background. For others it was about more obvious and tangible things – a world where doors open at our command, where lessons are taught by voice assistants whilst teachers simply monitor the room. Some even thought further ahead and forecast a future beyond voice technology, where our surroundings read our thoughts and desires altogether taking away the need for us to speak aloud. Although these imaginations vary widely, they all share a utopian dream of a world that works for us, making our lives more interactive, and overall, easier.



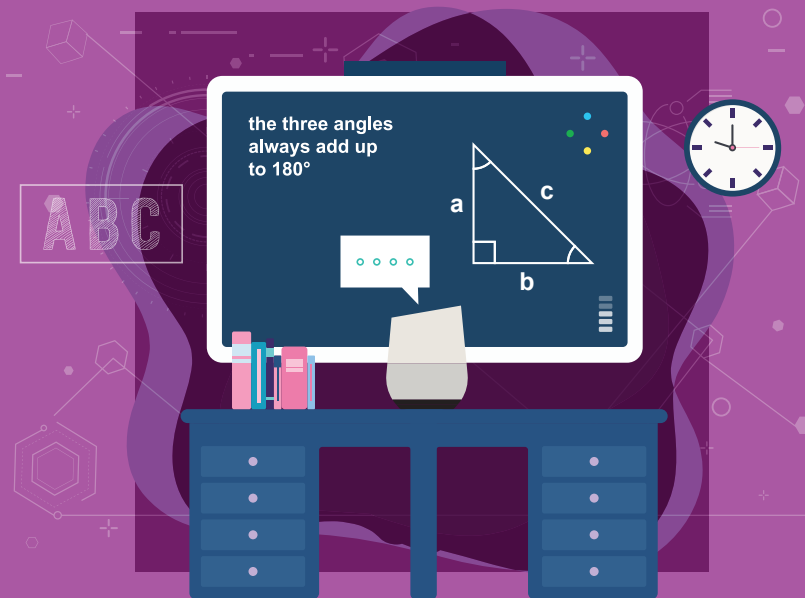
of millennials think that in the next 10 years, voice technology will just surround us in the air

"I think that in ten years' time Google will be integrated into everything. You won't have to go on a computer or a smartphone, you'll be able to say anything, anywhere, any language, any accent and it will get it right."

Male, Parent, London

"Voice activation will die out and then suddenly you will have visual tracking in your house where you can wave, and your TV goes away or something."

Female, Millennial, London



The vital job of teaching, that just a few years ago would have been deemed as being irreplaceable by robots, is now being reimagined with consumers imagining voice assistants teaching in schools.



People want voice technology to grow and expand beyond its current place in the car and in the house to being omnipresent and helping us with reminders as we go about our daily routines.



Consumers envisage a future where we no longer talk to each other. Instead conscious gestures are used to communicate and convey information.

WHAT IS IT?

The rise of the more conscious, deliberate media choice

mindful media

WHERE HAS IT COME FROM?

There is an increasing sense of uncertainty around many aspects of our lives these days. We have just lived through a decade that started with a financial crisis and ended in the divisiveness of Brexit and Trump. Many people are now worried, distrustful and feeling that too many of the big decisions in life have been taken out of their hands.

In reaction to this, people are looking out for those areas where they can reclaim control and influence – to get back into the driving seat effectively. Increased levels of knowledge and understanding are facilitating this shift in behaviour, with people focusing on the areas that

will impact directly on their lives. This reclaiming of control is now shaping many of the smaller decisions people make, particularly around areas such as health and wellness. In Mindful Media, we can see some of these behaviours extending into the area of media choices as well.

The earlier manifestations of this trend – in particular Digital Dieting from two years ago – saw more of a black and white response to media behaviours, often resulting in a binge/avoid cycle. This time round, reactions are more thoughtful and better informed, with these increasing knowledge levels creating a more considered, balanced reaction to the role that technology is now playing in our lives.



LIVE AND KICKING

LOOK WHO'S TALKING

MINDFUL MEDIA

SECONDS SAVED

REAL OR REPLICCA?

MORE CLUED UP

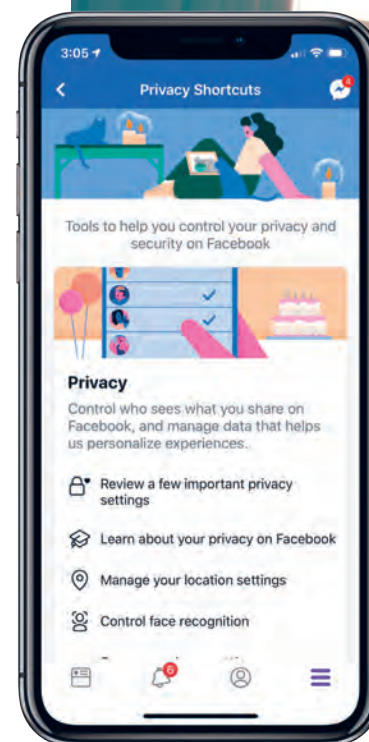
Technology and data have lost some of their mystery over the last year. The impact of GDPR – remember all those frenzied emails back in the spring pleading with you to stay in touch? – has resulted in people feeling generally more informed about how companies use their data, with just under half the people we interviewed now feeling more savvy about this topic. Similarly, the many news stories and resulting adverse publicity around technology company practices, have shined a light onto what was previously an inaccessible world of jargon, particularly amongst younger or more tech confident audiences.

As a result, people are now feeling more confident and knowledgeable about how companies are using the information that is gathered about them, and how they operate in general.

TECH COMPANIES RESPOND

These increasing levels of consumer knowledge mean that people now have higher expectations around media and technology companies – both in terms of how they operate as companies, and in how they impact our everyday lives. To some extent it's a question of 'you've had a hand in this mess, now take some responsibility and sort it out' (particularly when it comes to the impact of social media).

Many of the tech platforms are now designing tools and alternative products to address this new mindset – effectively enabling people to better manage their relationship with technology through applying it more cleverly. Facebook, for example, are now running a cyberbullying initiative – something that will be welcomed by the two thirds of parents we interviewed, who agreed that social media companies should be running courses to educate children on using technology responsibly. Along a similar line, Apple's Screen Time release, monitoring mobile time usage is also being well received – in our qualitative stage, people highlighted how the app was making them more aware of their screen use and the results for some were surprising. Whether they decided to do something about this or not depended on the individual, but they wanted to be presented with this information so that they could make that more conscious choice. Other developments, perhaps building on Tencent's trial of facial recognition technology to control your child's access to particular games, are also likely to be well received by UK audiences. One of the most consistently repeated concerns we heard about were on parental fears around how their children are using technology.



CONSCIOUS CHOICES

Whilst technology companies are helping to provide some of the solutions, people are readjusting behaviours under their own steam as well. Over half our sample agreed that they were now making more conscious, deliberate choices about the media they consumed these days, something that was particularly true for parents, and for the more tech savvy.

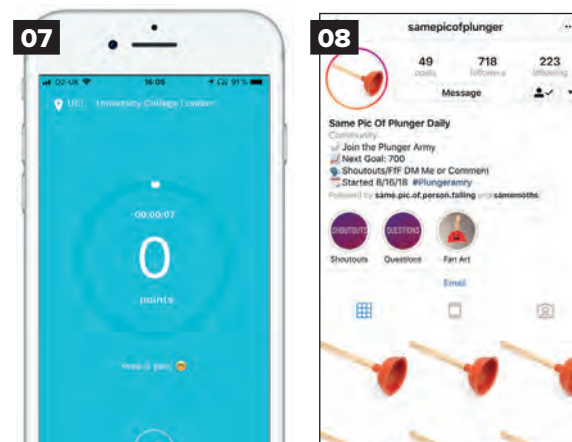
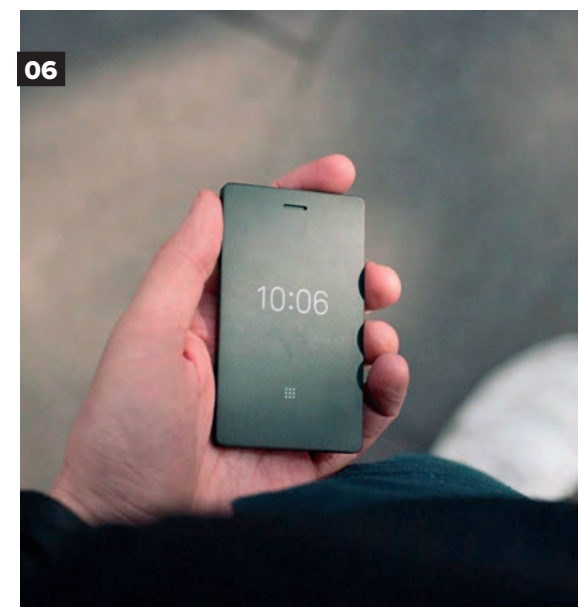
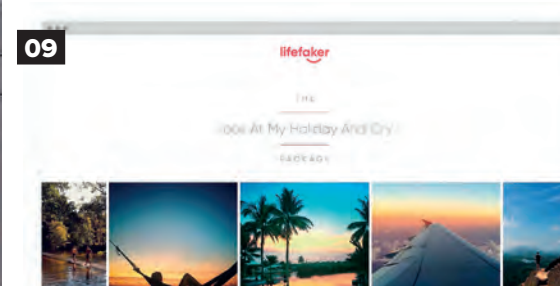
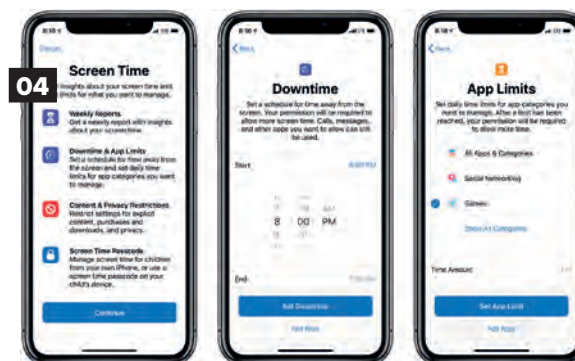
These choices were partly facilitated through the introduction of good habits and routines to help disconnect from devices, but other more selective behaviours could be seen too. More discerning content consumption was an emerging theme for younger, urban, high tech consumers. This behaviour could be seen across a range of activities – from increased selectivity around what was being watched on TV, through to consciously watching a highly enjoyed series at a slower pace – a reaction to the now mainstream box-set binge watch.

News habits were changing as well – an area that has also been explored in some depth by the Edelman Trust Barometer, with similar findings emerging. Almost a third of the people we spoke to were already paying closer attention to the sources they used for news. And tapping into that theme of how can technology help me manage my tech better, we found that even higher numbers of people liked the idea of an app that would show them how a story is reported differently across sources – with just under 6 in 10 under 34s thinking this was a good idea. It's not just about what source of news is consumed though;

the amount matters too – with younger audiences, Londoners and parents claiming to avoid the news more these days because it's all doom and gloom. Little wonder that RAJAR in August 2018 reported a decline in radio news ratings as listeners switched to music instead.

Social media – from a bad habit and a poor experience perspective – was an area of emotional focus for many, both in terms of how they felt about it for themselves, and in relation to children in particular. As one parent described it, 'I think the kids actually lose their lives on Snapchat, they seem to feel the need to respond immediately to everything, irrespective of what they're actually doing. Case of the tail wagging the dog.' So far, these concerns have not resulted in a wholesale abandoning of platforms, though there were some indications that a small number of people had already disengaged completely as a result. Instead, wider behaviour change was more centred around how the platform was now being used – with high reported levels of people unfollowing accounts that no longer made them happy, posting less personal content in particular, or just posting less in general. We saw people picking and choosing the parts of social media platforms that work for them, suiting the platform to their own use. Many were still using Facebook as a link to communities, for business reasons or for features such as marketplace, for example, but had shifted to Instagram for actual content. Overall, people were still using social media as a sharing platform but more of the personal content has migrated to more private platforms, such as WhatsApp and Snapchat.





01 LCD-Blocking Glasses

Smashing its Kickstarter target, the IRL sunglasses block light from LCD and LED screens, making them appear black - thus giving wearers a 'screen less' view.

02 Honour of Kings Facial Recognition Tech

Chinese tech giant Tencent unveiled a facial recognition system that detects if players are minors when they sign onto a game.

03 Facebook Teach Against Cyberbullying

Facebook have announced a million pound package, which will be enough for every secondary school in the UK to have a 'digital safety ambassador', to prevent online bullying.

04 Apple Screentime

Apple's new iOS update allows consumers to look at their app analytics and monitor their usage.

05 Nintendo Labo

Nintendo have introduced Labo, encouraging children to create game elements using cardboard kits.

06 Light Phone

The Light Phone II, a slim device for those wishing to reduce screen-time but not become completely unreachable, offers text messaging, Bluetooth and 4G connectivity only.

07 Hold

The Hold app gives students incentives to put down their phones and study, with users receiving points as the time without checking their phone increases. These can then be used to unlock prizes.

08 Instagram Duplicates

As a response to the stresses of running a personal brand on social media, thousands of Instagram accounts posting the same picture every day have attracted tens of thousands of followers.

09 Lifefaker

At first glance, Lifefaker provides downloadable sets of Instagram 'perfect life' content, however when users follow a 'download' button, they are taken to Sanctus' site with information on the negative health effects of social media.

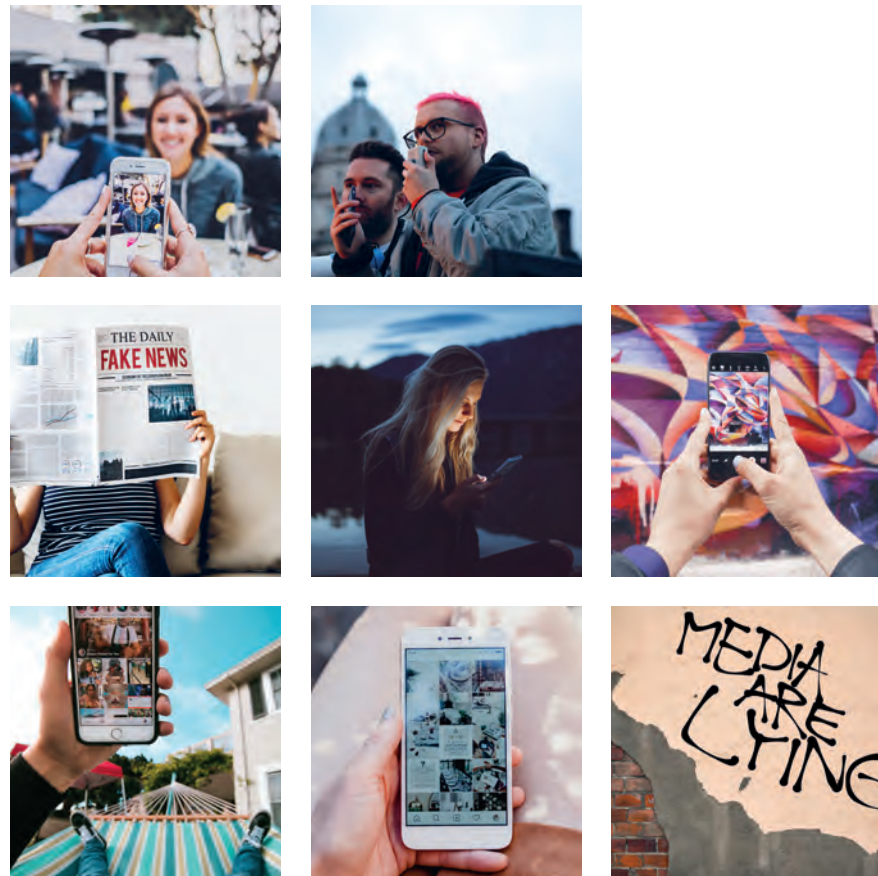


WHERE NEXT?

Activities around technology and media consumption are moderating across many channels, with these more thoughtful, considered behaviours influencing both how much and what is being consumed. However, it is within the realms of social media where the most emotionally charged changes are starting to appear, indicating that our use of it may well take on a different trajectory in the future, in comparison with the other media choices we make within our day to day lives. An indication of this strength of emotion can be seen in the fact that over half of the people we interviewed agreed they would be happy if social media had never been invented, a bold statement that was expressed with some consistency across the different audiences we spoke to. This negative response was being followed through with behavioural change as well – 44% of people agreed that they now post less on social media than they did 12 months ago, rising to even higher levels amongst younger and more tech confident audiences. These statements do need to be taken with a pinch of salt, as when people refer to social media they are usually

referring to the more public platforms and often do not consider WhatsApp or Snapchat in this equation. Plus, as we found with our trend *Live and Kicking*, there are just as many people that say they cannot resist the in-the-moment live feeling that social gives them.

The motivation behind these statements is more likely coming from a place that is explored in our trend *Real or Replica?* Is it becoming more apparent that what we see in the public domain can often not be the reality? Whether it's a filtered edit of the best bits of people's lives, algorithms that are over-tailored to our likes and dislikes, or the fake news we might be presented with, this is beginning to wear people's enjoyment levels down. What was once easy and fun, now requires effort from us, as we try to verify the news we've just seen or avoid those people whose views we don't share, or posts we've stopped liking. As one of our interviewees summed up, 'I try not to use social media too much because it depresses me, it makes me feel like I'm not living my life even though I know none of it's real. Everyone wants to post



the best bits, so it's not their fault – it just has the awful effect of making me feel like I'm doing something wrong with my life when really, I'm just living it.' People are just posting this stuff less. When it comes to the platforms as entities themselves, the majority of people want to see social platforms become more accountable and transparent, and can see a future where the platforms are more regulated. More tools will be in demand to provide us with further information and clarity of what these platforms are doing at the backend and to support self-management of how we use these platforms ourselves.

A particularly interesting area where we will likely see more conscious thought and changing attitudes in the future, will be around how people feel about the big tech companies. Currently the likes of Google, Amazon, Facebook, Apple, Netflix are seen as useful companies, although chinks are starting to appear, as we have discussed, with Facebook. As long as these companies are providing useful services, people will

be on side. But an area that people had not really considered was how far-reaching these companies are becoming. A minority were aware of Amazon moving into pharmaceuticals, for example, but few had really thought about the size and influence of these companies going forward. Most people never make the connection that Google owns YouTube or that Facebook also owns Instagram and WhatsApp. If this hasn't hit their radars yet, the real breadth of these companies is certainly something far from people's actual comprehension. But this won't be for long, as Google moves into more tangible areas such as connected cars, Amazon is more present on the high street and in our homes, and Facebook starts to permeate other areas of our lives as they offer us more exclusive content and technology. That's before you even consider the investments these companies also have, like Google's mega investment in Uber. The list is really endless for the scope of these companies and it's just not something that is landing with people yet. But, watch this space!

01

KNOW WHEN NOT TO DISTURB YOUR CUSTOMERS

With people making more thoughtful, considered choices around their media habits, being in the right place at the right time is key. Think about how your brand can be more sensitive to context and can adapt to situation and mood. Be respectful of switch-off moments.

02

CONSIDER LESS INTRUSIVE ROUTES FOR COMMUNICATION

Rather than shouting out to grab people's attention, think about technology solutions which are more on their terms, rather than yours. Smoother, less interruptive interfaces are more likely to be welcomed.

03

QUALITY, NOT QUANTITY

Don't overwhelm people with irrelevant volume. With media choices getting more selective, any brand communication needs to feel equally special. Less may well be more.

04

GIVE BACK CONTROL

Think about ways in which you can give people more space to choose the content they receive from your brand, with alternatives that help address different needs – consumer free choice can positively impact brand relationships.

05

CULTIVATE A HEALTHY SOCIAL PRESENCE

Be thoughtful about how you appear in the social space in particular. Is it healthy? Does it have purpose? Or is it perpetuating perfection?

06

BE TRANSPARENT ABOUT YOUR PRODUCTS AND SERVICES

Make information about your products and services freely available so that people can make that more conscious choice. Sometimes people are more interested in the back end detail than you would think!





Maths Mathisen
CEO and Co-Founder

Today's society is overloaded with news, videos, messages and content. We are consuming information in 70% of our waking hours, checking our phones 150 times a day and spending more than 76 days a year on our devices. This has led to a society which has become reliant on our smartphones as we have not learnt how to effectively manage our time spent on our devices. Unfortunately, we have become addicted to social platforms which are hijacking our mindset and profiting massively from this.

From an advertiser perspective, the current problem is not just to reach the next generation, but about building a connection to them and engaging them in an authentic and meaningful way. How important and effective is a like, click, follow and comment for a brand? The next generation is proven to be more purpose driven as they care about what the brand stands for. The need for transparency and the need to change from a pushy marketing tactic to a pull is important – as Gen Z hates ads.

The issue of smartphone addiction will be further amplified with the increasing mass of information available. We believe that offline time is the new luxury and there is a much wider trend that Hold is tapping into as people want to be able to switch off and 'Digital Detox.' There is a shift as people are becoming more aware of the dangers of excessive phone use and the impact on mental health. It also helps that celebrities such as Simon Cowell are acting as self appointed ambassadors of this movement and refraining from using their phones for ten months.

We believe that we can help everyone develop a healthy relationship with technology. Through using artificial intelligence, social components and positive reinforcement, Hold will become your personal coach and change your behaviours. Hold will start to take ownership of different contexts where mobile usage is harmful and should be limited. For example, we want to incentivise you to switch off while you have a meal with your friends and family. We also want you to switch off when driving and we want to make sure that you have a more productive work day.



Tom Butcher
Group Head

Mindful media is an interesting one and certainly something that we, as a social publisher, are totally aware of. Due to the way we engage with our followers, we naturally see any changes in the way they consume our content almost immediately. We now create positive social campaigns, addressing these issues to our mass community with the aim of creating social movements with tangible results. Essentially, we want our community to feel good about themselves after engaging with our content. After realising we had a huge platform to talk about important subjects, the current trend is users coming to our brand to get information and discussion on these topics in a way that's relatable to them. A few years ago, we were very much seen as just a viral publisher.



Denise Turner
Insight Director

With the advent of new platforms, newsbrands today are reaching more people than ever before. These titles have remained beacon brands in a world of uncertainty and instability – they are trusted editorial advisors. People understand that newsbrands have an opinion and they don't necessarily agree with their newsbrand's stance on everything all the time. But these shared values are extremely powerful in turbulent times.

A vital consideration for media brands – and advertiser brands too – is the strength of the brand. Strong brands with a strong point of view and a strong understanding of their audiences, are essential navigating guides in times of uncertainty and seemingly unending choices. Quality editorial and programming is a given – if we want people to spend time with our media, it needs to inform, provoke, satisfy, entertain, help people unwind, tap into their passions. This speaks to careful curation, thoughtfulness, seeking to inspire rather than clickbait and transitory factoids.

People seek out and value authenticity and true community. Real, tangible, grass roots level interaction where they feel back in control. Your newsbrand already feels like a like-minded community, because of shared value systems and beliefs, because they genuinely campaign for change. Increasing this sense of community, through membership, subscriptions, live events, courses and suchlike are at the heart of newsbrands' strategies for now and the future.

The Telegraph

Emma Elford
Content Sales and
Strategy Director

Telegraph Spark is the in-house branded content division at TMG. Branded content has always been split into two camps – branded content and branded 'editorial' - the difference being one is what a brand wants to tell an audience and the other, what an audience wants to hear from a brand. The best solutions are a blend of both. A few years back, before we called it branded content, we flirted with the native content label and before that, my favourite - Creative Solutions.

Regardless of name, the principle remains the same; branded content is a trade off - spend some time with brand x and in return we'll tell you something which is either informative, entertaining or surprising. When a brand or publisher fails to deliver on one of those three criteria it fails to be 'mindful' in this context and moreover fails to deliver a client results, which we must remember is the purpose of branded content in the first place.

A lot of clients are now coming to us to align with our authentic voice and with issues, concepts and ideas that are much broader than their core area of influence. And they are being much braver - allowing our editorial voice to come through. All of our content is made in house as Telegraph Spark and much of our activity has a sponsored editorial feel. The best partnerships are those where we have a robust and healthy, close relationship with the agency and client who hold us to account to ensure we deliver on the brand objectives as well as the editorial objectives. Whilst clunky and trite advertorials are the enemy to content solutions so to are partnerships where you have no idea why the brand is involved and worse still; who the brand is.

After a few years when the market demanded a 'stack it high, sell it cheap' policy for branded content the tide has turned again. With increasing demand for transparency and trust in media, as a quality news publisher The Telegraph is in a unique place to respond to that demand.

TOP 10 TAKEOUTS

BACK IN THE REAL WORLD

01

People are more aware of how much time they're spending on their screens and how they're behaving online. Over half believe they are making more conscious and deliberate choices about the media channels they interact with.

02

People are now taking small, regular steps to manage their tech use. Four in ten have put routines in place to make sure they regularly disconnect from their devices.

03

While ultimately people feel that they are responsible for regulating their own tech usage, help from companies is welcomed. Pop-up messages to warn about excessive usage of social media, or social media companies educating children on their digital activities are both seen as appealing.

04

Given the right incentives, millennials are even more likely to take a break from technology. Almost two thirds would use an app that rewards them for time spent off their phone.

05

With all of the news stories of the past year (including GDPR), almost half now feel that they are better informed about how social media companies work and how their data is being used.

06

The publicity around fake news has made people increasingly mindful of information sources. One in three have started paying more attention to where they get their news from in 2018. A third of people are avoiding news altogether because it's all doom and gloom!

07

In what increasingly feels like a split society, people are deliberately seeking out viewpoints alternative to their own, to help them understand the full picture. Almost a third of people have started doing this more in 2018.

08

While still enthusiastically consuming content on social media, people are posting less of their own content on these platforms choosing to share directly with their friends and family on messaging apps instead.

09

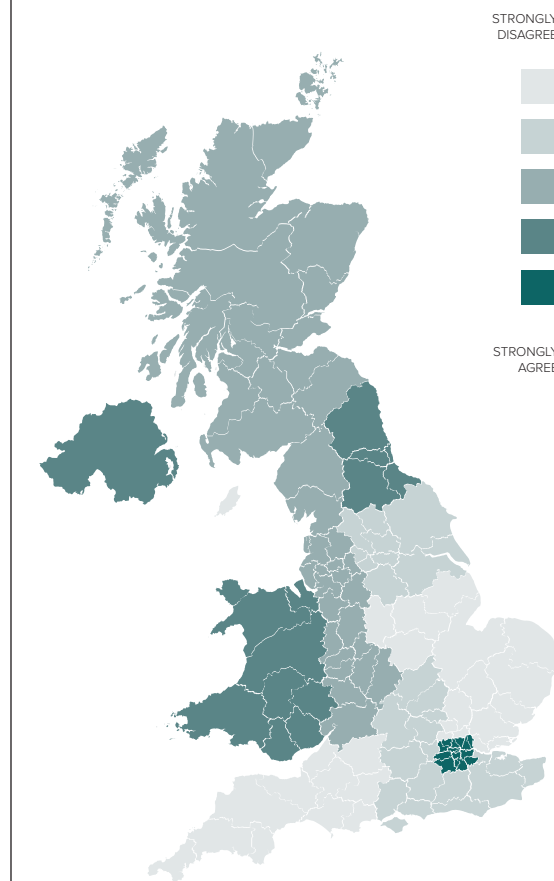
Technology is a native language for most children these days. While parents are reliant on their kids to keep them up to date with new technology, there is a growing anxiety that the next generation will lack the basic communication skills required to properly connect with each other.

10

TV viewing is becoming more selective for many. Just under six in ten people are now claiming to be more selective about what they choose to watch, with a return to slower, more savoured viewing for those programmes that they really enjoy.

TECH TIMES

I've deliberately cut down how much time I spend using technology



EMOTIONS

How do you feel about where this topic could go in the future?

EXCITED
4%



ENTHUSIASTIC
8%



INTERESTED
21%



INDIFFERENT
35%



APPREHENSIVE
15%



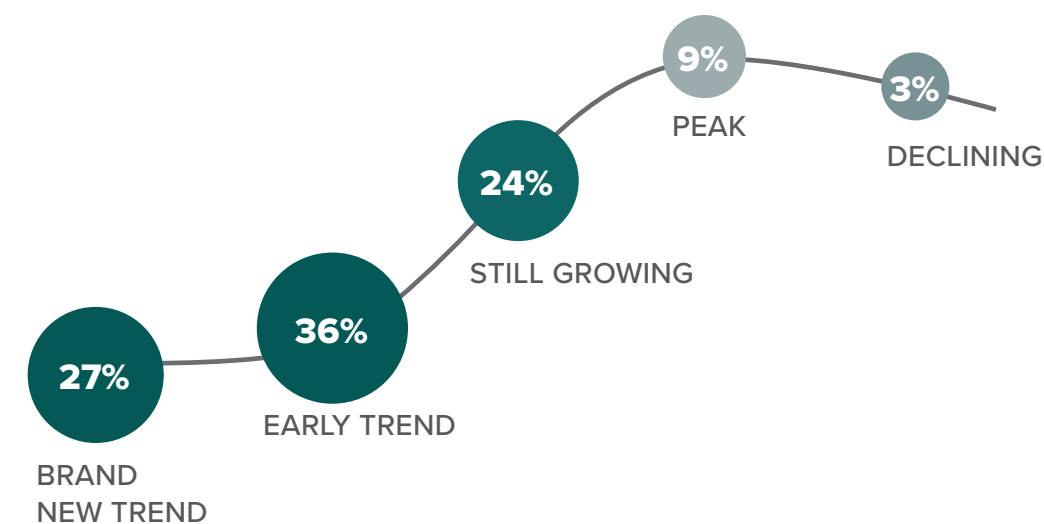
UNCOMFORTABLE
9%



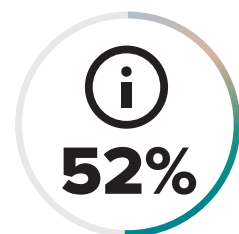
WORRIED
8%



LIFE CYCLE



MORE CLUED-UP



of adults feel more clued-up about media and technology these days, vs 61% of 18-34s & 62% of parents

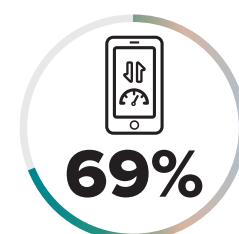
"I'm very cautious about it now, how companies use personal information. Data is like gas – despite the most advanced sealed containers available, some will always leak out."

Male, 45-54, South England

"They're getting greedier and greedier, the YouTube algorithm is less about providing users with the most relevant videos and more towards disabling influencers' earning power. I worry that it'll become less about reaching and educating people, and more of a money making scheme."

Male 35-44, North West

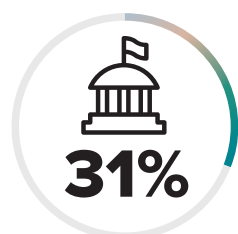
ROLE OF TECH COMPANIES



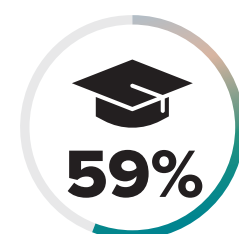
of parents find an app that allows them to monitor their children's tech use appealing



of parents would be open to facial recognition system that identifies and blocks minors from playing online video games



of people would find it appealing if the Government provided guidelines and advice on how much screen time we should have – rising to 45% for parents and 48% of Londoners



find it appealing for social media companies to run courses to educate children about how to use tech responsibly

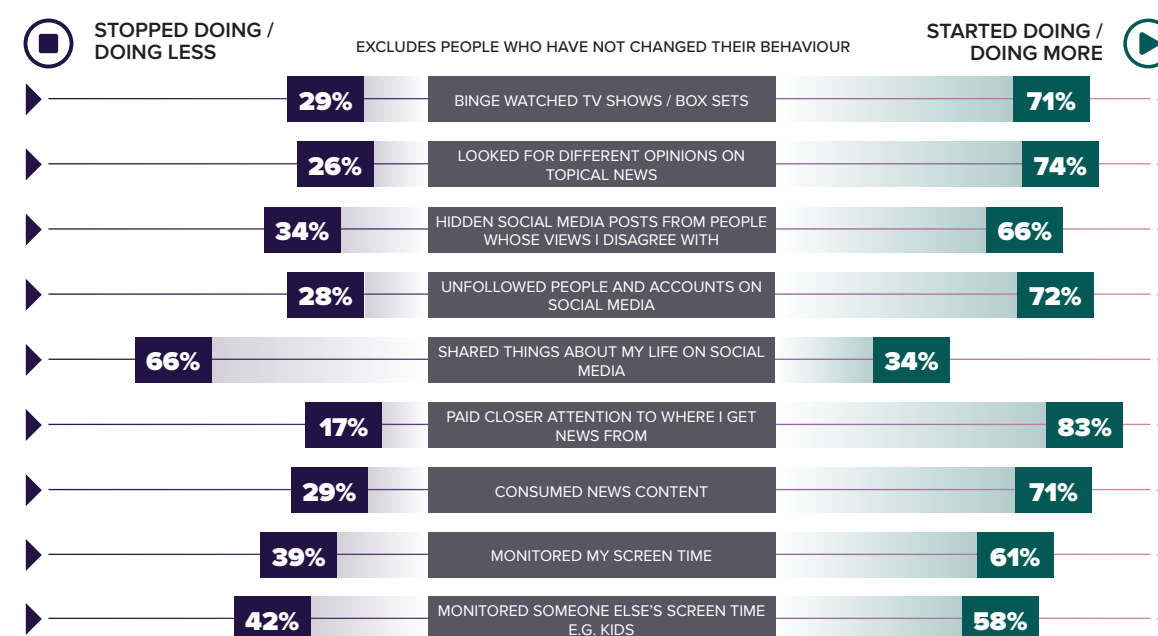


would welcome pop-up messages on social media warning about excessive usage, rising to 51% of 18-34s

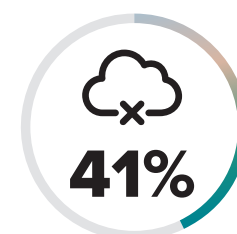


of adults would be happy if social media had never been invented

HOW HAVE PEOPLE'S BEHAVIOURS CHANGED IN THE PAST YEAR?



CONSCIOUS CHOICES



have routines to make sure they regularly disconnect from devices – rising to 50% of Londoners

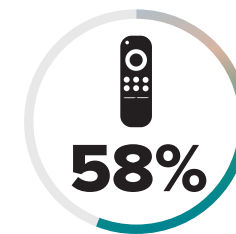
"When I feel that it is becoming too much, I try logging out of the apps I use. It makes it harder to go on and have a quick flick through."

Female, Millennial, South West

"I follow a lot less people nowadays – it avoids having my feed cluttered. I only really like posts by my friends, or things I actively engage with."

Male, Gen Z, London

"Sometimes I do turn the Internet off in the house and my kids literally run down the stairs as if there's a fire." Mum, South West



of adults are being more selective about the TV they watch these days

THOUGHTS ABOUT MEDIA COMPANIES

COMPANIES PEOPLE FEEL NEED TO BE REGULATED MORE...

facebook

Google

COMPANIES PEOPLE SEE THEMSELVES USING MORE OF IN THE FUTURE...

amazon

NETFLIX

Google

COMPANIES PEOPLE THINK WILL BE REPLACED BY AN ALTERNATIVE...

BBC

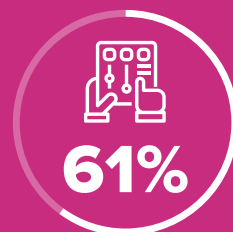
facebook

Apple

BACK IN THE REAL WORLD

FUTURE SCOOPING

People are aware of the impact of technology on their physical and mental wellbeing, yet when faced even with the idea of a future without phones or media in general, they simply can't imagine it. It's one step too far. To fight this fear, some people imagined ways that their technology might instead bring them warnings in the similar way to 'unhealthy' substances today. On the other end of the spectrum there are those that think we'll abandon phones, media or technology altogether. With this, people began to imagine a polarisation of society where people either fully embrace technology in all ways, or step back from technology entirely to lead a tech free life. After much discussion about the dominance of the big tech companies, people then envisaged a future where one or two tech giants dominated all areas of our lives. One thing that was clear was that those who do embrace tech will be looking at a world ruled by these superior technology providers.



of adults feel that in the next ten years, we will control technology rather than it controlling us – and 81% love the thought of this.

"We won't have to worry about regulating our mobile use because we won't have any mobiles."

Female, 35-44, London

"I think Amazon will have hammered things like the big supermarkets. It will be the death of the high street."

Male, Millennial, London



It is easy to imagine health warnings on our new technology purchases like the labels we now have on cigarettes today.



We're still attached to our phones

of people hate the idea that mobile phones may no longer exist in the next ten years.



As they hear about more and more about retailer closures, consumers fear the death of the high street. What is more concerning is what they believe could replace it - a series of Amazon shops to suit their every need.

Have



Have Not

Our society may begin to split as the divide between those embracing and those dismissing technology becomes ever greater.

WHAT IS IT?

Tech helping our lives run more smoothly,
saving us seconds on everyday tasks

seconds saved

WHERE HAS IT COME FROM?

We live in a world where people are busier and every second counts. Dull habitual tasks take up precious time that could be spent in more valuable ways, just enjoying life. The appeal of technology is that it not only allows us time better spent, but in some cases, it can ease our minds or relieve us from even having to think about the task at all. Technology is now rethinking and removing some of those processes, perhaps only shaving off fractions of moments, but smoothing and improving our experiences.

When this is done well, it can leave people with a real sense of satisfaction. But hasn't tech been doing this for years? The answer is yes, but this year we are seeing some significant differences in uptake – in particular around the areas of payment and the connected home. New payment solutions are proving popular thanks to the large tech companies' 'one-click to buy' buttons and services that allow for payment by simply presenting our mobiles. Contactless payment is now

widely accepted as an alternative to cash (eight in ten of those we surveyed now use it) and this easy 'tap and go' mindset has encouraged people to trial other new forms of payment.

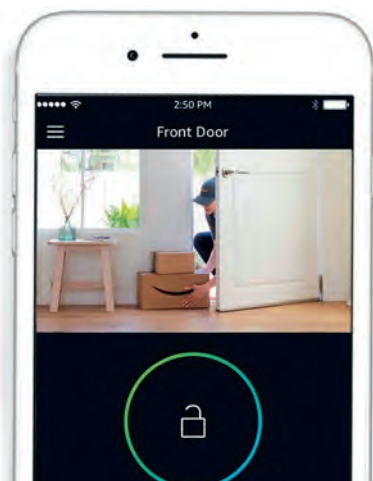
It is early days when it comes to the connected home, but people are noticeably starting to embrace elements of the smart home, such as heating, lighting and security. Increased penetration of entertainment and hub devices including smart speakers and smart TVs mean more points of control for smart home products and the uptake and appeal of this technology is increasing along with comfort levels. We expect to see further adoption and innovation in these areas as processes are automated and streamlined, and products connect more seamlessly, especially with 5G imminently on the horizon for the UK. These smoother processes and seconds saved combined are set to have a big impact on our day to day lives in the future.





HOW IS IT DEVELOPING?

The Internet of Things (IoT) and Artificial Intelligence (AI) take this trend beyond a promise into a reality. Many technologies that consumers use every day now have AI quietly working away in the background to improve the user experience. The same uptake can be seen within enterprises where the use of AI is becoming more common, and although it is far from ubiquitous, it is being used to improve existing services. As more and more objects come online, an ecosystem will be created which will bring safety and savings of time, headspace and money. Let's look in more detail at the two areas in which we are seeing significant change.



THE SMART HOME

The uptake of smart products is being driven in part by the adoption of smart entertainment products such as smart TVs and smart speakers, creating a gateway into a smarter home for many users. We now see 13% of people in the UK who have smart speakers using them to control other products in their home (rising to 20% of Londoners). We are starting to see people invest in smart light bulbs, security systems, and thermostats. Once people start their smart home journey it just takes one more piece of tech, such as a light bulb, for them to imagine other ways that their home could start to work for them. Other products that are gaining popularity are smart doorbells and door locks. New innovations are launching in these areas, such as the Amazon Key which launched this year and allows customers to watch their doorstep and have parcels delivered inside their front door.

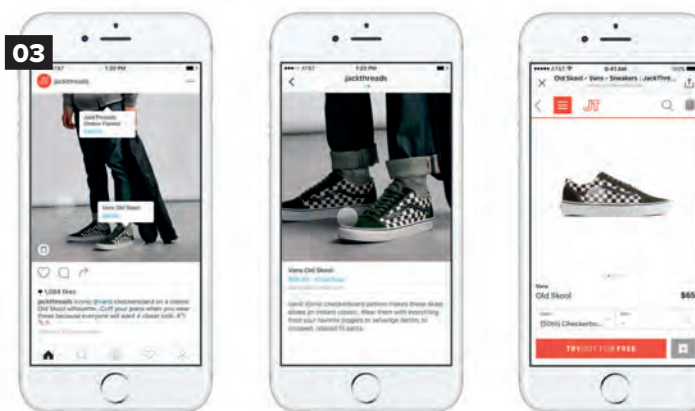
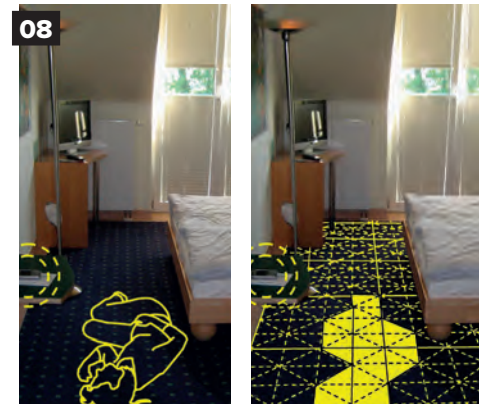
Cost is still a major barrier for people who are not yet investing in smart home products – particularly for those larger smart home items such as fridges, which people are unlikely to invest in unless replacing their current product. But in reality, some of the reluctance may be more to do with the perception of these things being expensive, due to the actual value of them not being realised. Many people struggle to imagine the benefits these products bring until they actually have experience of them. People also say they fear laziness if automation and smart products are relied on too much. This tends to be the reaction of some of our older audiences, who struggle to imagine the benefit of these products and is reflective of their desire to remain self-reliant.

NEW PAYMENT METHODS

People are now more aware than ever of the new ways in which they can pay; both online or in brick-and-mortar stores. Apple Pay was widely discussed in our qualitative research and adoption rates are rapidly increasing. As more customers become aware of the opportunities, confidence increases around its security and as handsets are upgraded, we are only going to see adoption grow further. The attraction is that new payment methods such as Apple Pay, Fitbit wearables, payment rings etc. save time and energy in various ways, whether it's allowing people to leave home without their wallet, or simply saving them from having to enter their details again online.

Yet, this trend goes far beyond that of mobile payments. Brands are starting to take notice of the need for speed and are adapting their services to reflect this consumer desire. M&S, for example, has recently launched a checkout-free mobile payment service to speed up the buying experience in a small number of its stores. Another brand taking this up a level is Amazon, with its sensor-filled, cashier-less Amazon Go supermarkets, coming soon to the UK. And then there's Dirty Lemon which opened a checkout-free store in New York where payment is made later by text message. As more and more customers experience frictionless shopping, it will become a necessary service, not a luxury.

IN THIS SPACE



01 M&S Mobile, Pay, Go

M&S's new mobile app function lets customers scan, shop and pay so they don't have to visit a checkout.

02 Uber Cash

Uber Cash provides a closed-loop payment system that lets users add funds to their Uber accounts, so that they then use Uber Cash to pay for all Uber products.

03 Instagram Native Payments

Instagram users can now register a credit or debit card and make payments within the platform.

04 Waitr

The Waitr app allows restaurant diners to place orders and pay bills without speaking to a member of staff, and includes both a take-away feature and loyalty program.

05 EasyJet Look&Book

Look&Book, accessible via EasyJet's app, allows users to upload screenshots of destinations from Instagram, then sends users to their website's booking section with flights to the location.

06 Amazon Key

Amazon have developed Amazon Key, designed to let customers give permission for couriers to open their door and deliver parcels inside their house.

07 Pup-eeze

Pup-eeze is a smart dog collar which monitors your dog and connects with the smart home – ensuring the house is at the correct temperature for your dog, for example.

08 SensFloor

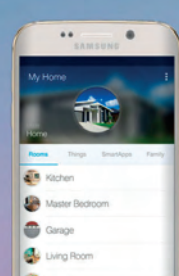
SensFloor is a smart flooring system which can detect when and where people are walking. Used as a first responder tool, it can alert emergency services if it detects someone lying unresponsive on the floor.

09 Samsung's SmartThings

Samsung's SmartThings app enables users to control all smart products remotely – such as lights, locks, thermostats and other household appliances.

10 Apple Shortcuts App

Apple have introduced the Shortcuts app, which allows users to program their own 'shortcuts', such as putting their phone into Do Not Disturb mode if Siri is told they are watching a film.



App



Hub



Things



WHERE NEXT?

As we look ahead we can see that many people, especially younger audiences and parents, are excited about the possibilities that these technologies can deliver, with the prospect of smoother experiences and more time saved in sight.

We are on the first steps of a long journey towards the fully smart home. Our research shows growth in ownership of smart home products is finally cutting through. On another positive note, it also shows that people are becoming more open to imagining a future filled with useful smart home technology, although their awareness of what this might practically include is still relatively limited. Small steps but positive ones.

A world run using AI to manage our homes ultimately is what's heading in our direction. To a degree, this is potentially too big a concept for people to grasp when thought about as a whole. People are still finding it easier to think about individual use cases for smart tech, and how each of these will make a difference to their

day, rather than the bigger picture of how it could all link up. And who can blame them? The very separate ecosystems from the tech companies have not made this easy to imagine, with separate apps/hubs to negotiate, and compatibility between devices not top of their list. This will change as tech companies work hard to improve this. We have recently seen this with Samsung's SmartThings app that works with hundreds of compatible devices to allow for a seamless experience across providers and appliances. We will also see AI start to take context into account, as it learns more about our habits from our connected home devices. Amazon this year launched Alexa Hunches, a tool that uses deep neural networks to understand a person's daily routine and habits. This data is then used to assist with the small things such as asking the user if they meant to leave their hair straighteners (plugged into a smart socket) on or asking if they would like this switched off. From helping us to stock up on essentials, to telling us when we have left the lights on and turning them off, automation and intelligence promise to



remove many chores and worries from our daily lives.

When it comes to new payment methods, people are a little further along the adoption curve, but it is still early days for the frictionless shopping that we are starting to see. For example, new customers seen shopping at Amazon Go stores are reported as being slightly hesitant and confused. It may take some time for people to adopt a level of ease around cashier-less stores and other new technology, but when adoption does take off it will snowball, and those stores not adhering to the trend or tapping into the motivations behind it, will find themselves losing customers.

As this trend develops and AI becomes even smarter, companies will take the Seconds Saved trend even further. Amazon, for example, have plans to use intelligence to predict which products an

individual is going to buy, and then start shipping it to them before it has even been bought. And on the delivery side as well, a large number of patents have been filed to create the perfect drone delivery system, incorporating AI with contextual understanding and predictive capabilities. 5G will be switched on in many of our major cities in 2019 and with faster download speeds and connection capabilities, this promises fuel the fire for any 'Seconds Saved' technologies going forward.

There will also be growth in this trend beyond that of the smart home and new payment methods. Other services such as law, finance and health are seeing similar changes, with AI being applied to speed up processes, ultimately saving hours, not just seconds.

WHAT THIS MEANS FOR BRANDS

01

DATA, DATA AND MORE DATA

Data is at the heart of many of these technologies, and with increased adoption we will see even more data added into the mix and available to brands. Think about how this data could be used usefully – how to connect it to and enrich existing data sets, or to tell us more about people's behaviour.

02

RESPECT THE DATA VALUE EXCHANGE

People understand that to have these devices they must be willing to give away their data as a valuable exchange. Companies do need to ensure however that they maintain security and trust with their customers' data, as it is a fine line between acceptance and rejection in these early days.

03

WHERE CAN YOUR BRAND HELP TO SAVE SECONDS?

A focus on consumer pain points can help brands to spot the processes or products that can be streamlined to reduce friction. Could a chatbot, voice assistant or other automated service fill this gap or be a solution? Are you using AI to make processes and decisions smarter for people? Or are you offering subscription payment models that allow customers to get on with their daily life?

04

FIGHT OR FLIGHT?

Companies such as Amazon find it easier to provide rapid, seamless experiences because of their wealth of data, company set-up and infrastructure. But how do those organisations that are smaller keep up with this consumer demand? This raises the question of whether brands should partner with the bigger players or remain independent to meet consumer demands.

05

BUILD LOYALTIES SOONER RATHER THAN LATER

This level of automation potentially leads to a scenario where systems make decisions on behalf of people. With this outcome, how do brands ensure they are kept top of mind and remain the product of choice? Working to increase brand awareness now will pay off later.

06

TEAM WORK MAKES THE DREAM WORK

As more technology providers (Amazon, Apple, Samsung, etc.) continue to work both with each other and other brands, we will start to see the ecosystem expand and adoption rates increase. Brands should think of ways in which partnerships will be fruitful from both a B2B and B2C perspective.

07

CONTROL MATTERS

It's human nature to want to feel in control of a situation. As processes become more automated, think about how you can ensure people feel as if they are still running the show, rather than it being run despite them.



Andy Hill
Head of Food Creative,
Content and Comms.

We know our customers are busier than ever before. Whatever stage of life they're at, they're using technology to fit more into their lives. But at the same time, it's a matter of balance – they tell us that they want to save time on repetitive, dull tasks, so that they can spend time doing the things they enjoy with friends and family. Technology, used well, can help us improve every aspect of the customer journey, and it's an area we're investing in as part of our 'Digital First' ambition. For example, our 'Mobile Pay Go' app, currently being piloted in a number of London stores, allows customers to scan their shopping on their own phone as they browse the store, and then pay via their phone. It saves them time, does away with queuing, and makes the whole experience quicker and more enjoyable. Across the market, we know technology will be integral to every aspect of the shopping experience. But what's key to us is that it's always used to make things better, and deliver a more pleasant, more engaging shop. So for M&S Food it's not just about saving time, it's also going to be about bringing the experience to life, whether that's giving customers more information about the provenance of our products, bringing cooking instructions to life, or giving inspiration for healthy family meals.



Elena Corchero
Futurist

As with all new technology, people adopt it faster if the benefits are clear to them. We're also at a time where there is a genuine appetite for this technology. Advances in smartphone tech, and a greater awareness of how apps and assistants can support their daily lives mean that the leap to smart devices in the home isn't as great as it was.

We're going to see more convergence of tech. You'll start to see more smart speakers that have screens, and more screens that have voice assistants built in. At some point there will be a shift from people relying solely on smartphone apps to interact with their home AI systems, as voice tech becomes more ubiquitous and sophisticated.

As home AI systems take over the running of the home – fridges restock, or appliances book their own maintenance – we call this the new era of B2B marketing: bot to bot.

Brands are going to have to work harder to find a place in the economics of the home to avoid being bypassed because of the tech. Some of this will be affect advertising and media strategy. For instance, if your fridge is configured to automatically replenish your favourite soda, that means that any competitor brand is going to have to work extra hard to connect with you emotionally, to drive you to change your replenishment settings. Some brands are going direct to manufacturers. Siemens already manufacture a dishwasher that is factory set to re-order Finish detergent... does that mean we could see fridges that are pre-set to order from Sainsburys, or Amazon?

Other brands are writing themselves into the content we consumer in our smart speakers... like Diageo and its 'Open the Bar' skill, which recommends Diageo brands in its cocktail recipes.

The issue of brand bypass is also relevant for publishers. When you ask your smart fridge for dinner ideas, where will the recipes come from: BBC Food, Martha Stewart... or will people turn to brands like Kraft or Heinz, or to retailer platforms?



Neil Bruce
Head of Mobile
and digital Innovation

Social researchers liken the adoption of new technology to the way an infection spreads through a population. The slow rate of initial adoption is due to innovation having to start from outside the social system – and as a result, few are susceptible. At a crucial, 'tipping point', a sufficient portion adopts the innovation, overcoming resistance as a period of hyper-growth ensues. Excluding Smart TVs (already heading into maturity), UK adoption of smart home technology (speakers, thermostats, lighting) stands at 27%. While worldwide adoption of Apple Pay is between 16 and 20% – with similar levels for Android Pay. We've hit a tipping point – and as a result, expect adoption of time saving technologies to increase dramatically.

As adoption increases, consumers' lives will be streamlined, starting with routine tasks before beginning to use these technologies in more advanced ways. However, the cynic in me says that these time savings will not be noticed by the consumer. We can expect to see companies introduce new products and services to infill this newfound free time. Amazon's smart home technology is designed to sell you stuff, while Google's is designed to sell you – we can expect consumers using these technologies to encounter marketing initiatives based on their time savings.

We already see this happening – navigation Apps like Waze know the time they've saved you and make recommendations based on this. Moving forward, someone booking a flight through their smart speaker, for example, can expect to be pitched relevant Amazon products, or be advertised relevant services by Google.

I don't think we'll see Jetson-esque lifestyles straight away, but there'll be increased expectations that homes have basic smart functions. When my goddaughters visited from America last year, they asked Alexa to play 'Let It Go' as they walked in – they just assumed Alexa would be there. Until (or indeed if) Amazon and Google decide they can play together, I see consumers locked into one of two smart home ecosystems. While consumers will use them similarly, their experiences will differ, and advertisers will need to approach them with different marketing strategies.

Many of the technologies needed to take this trend to the next level (e.g. delivery drones) will likely result in a need for legislation, which could curtail rollouts (just look at dockless cycles to see what an uncontrolled release looks like). However, new technologies that streamline delivery to the extent of same day delivery will become the expectation.



Robert Cross
Creative Technologist

The novel experience of buying into these technologies has passed, adoption is now driven by the value of the overall service instead. Connected technologies are now simply a building block of a company's service design toolkit. One that previously only focussed on good industrial design, user interfaces and customer service.

There will be very little impact on consumers lives. The first few interactions aside, a consumer shouldn't have to care about how they told a lamp to turn on, or the fact they could see their banking history so transparently. These are experiences that will come to be taken for granted until they break and don't work as expected. There's nothing more frustrating than being misunderstood by Alexa, and having spice girls blast from your speakers while you stand in your living room in the dark.

This trend is driving existing institutional services, such as banks, energy utilities, even pizza delivery to be better, which will lead for a better experience for every consumer. As an advancing technological society, we level up, and look to the next tier of user interaction friction points to tackle next.

01

Over two thirds of people believe technology will play such a big part in our lives in the future that we'll no longer think about it – whether we like it or not.

02

27% of people now own at least one smart device in their home (compared to 21% in 2018).

03

Busy families show the greatest demand for smart devices that save time – with almost two thirds interested in a thermostat that automatically adjusts based on your temperature.

04

Younger people are also keen to embrace connected home products like smart kettles and, further in the future, vacuum cleaners that also pick up items off the floor!

05

We aren't moving towards a fully automated world just yet – over two thirds of people still find enjoyment in doing tasks manually.

06

People are getting more demanding when it comes to delivery. Over four in ten would find it appealing to have their online purchases delivered to them wherever they are – even if they're out and about.

07

Londoners are embracing new payment solutions with a quarter making payments using a smart watch at least once a week and four in ten finding appeal in paying for things via a chip embedded in their hand in the future.

08

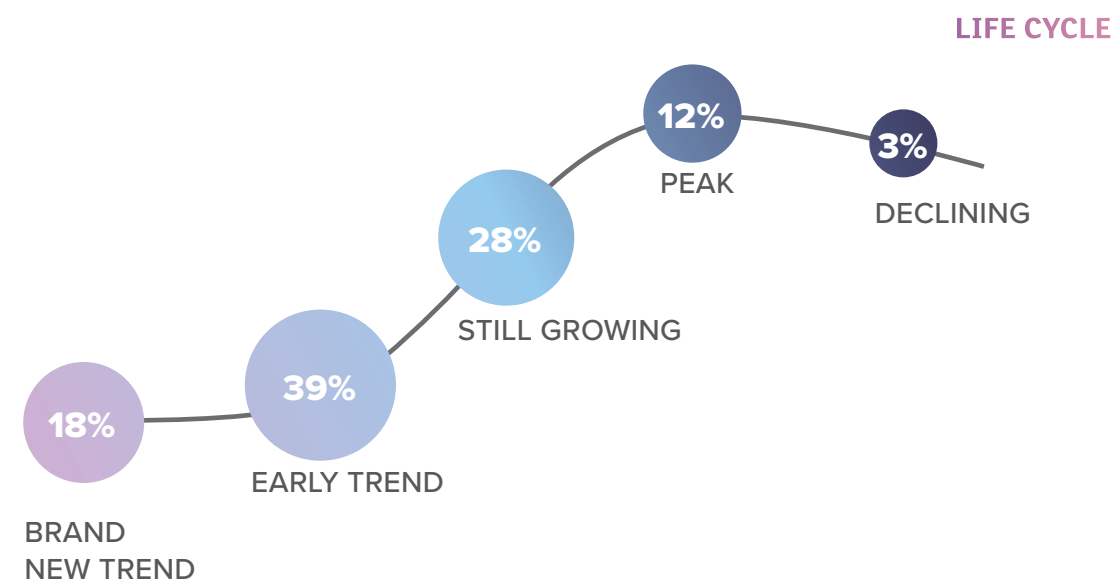
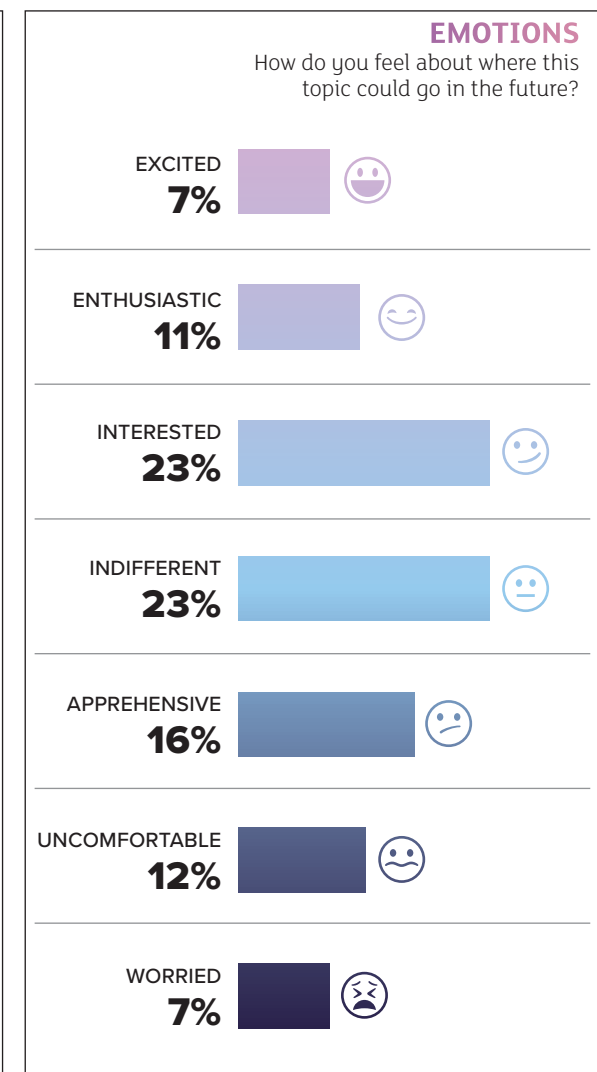
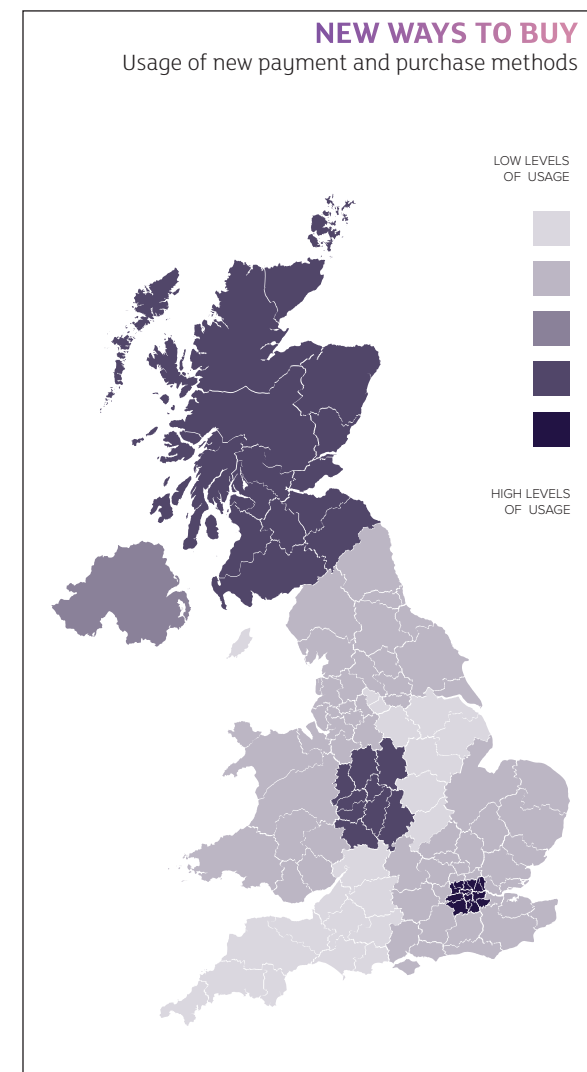
A third of people in the UK would like to own a driverless car. People think it will improve traffic flow and reduce the chance of accidents.

09

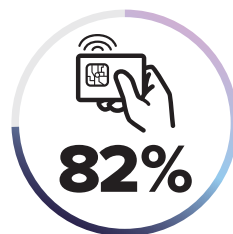
Smart technology creates a tension for people between the control it gives us over our lives and the concern over how reliant we are becoming on technology for the little things in life, especially for older audiences.

10

Almost a third of people believe their phone knows more about them than their family, rising to almost half of under 34s.



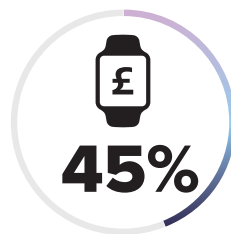
NEW PAYMENT METHODS



of adults have made contactless payments – 59% at least weekly



of Londoners make payments using Apple Pay – only 24% for rest of UK



of Londoners have made payments using a smart watch – only 17% for rest of UK

“Don’t even carry my wallet anymore. That’s old skool – I just need my phone!”

Male, Millennial, London

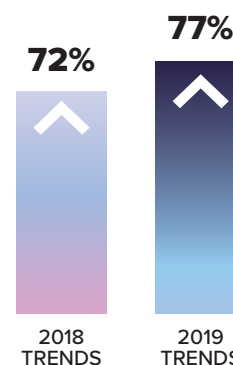
“I store payment information online for quick access. I use PayPal more often for convenience, use my mobile for scannable vouchers and loyalty cards such as Tesco Clubcard.”

Male, Millennial, Northumberland



THE SMART HOME

AWARENESS OF SMART HOME DEVICES



“I think we will become lazier as things get done for us by technology – 100%. We’ll be doing less physical work, so chores, cleaning, cooking. I think everything could be automated.”

Male, Parent, London

“We have a robot vacuum cleaner which schedules itself to clean up once a day – we have a lot more free time now.”

Male, Millennial, North

“I love my Nest, it allows me to turn my heating on when I arrive back in the UK after being on holiday. If I forget, I can turn it off from anywhere where I have a WIFI connection.”

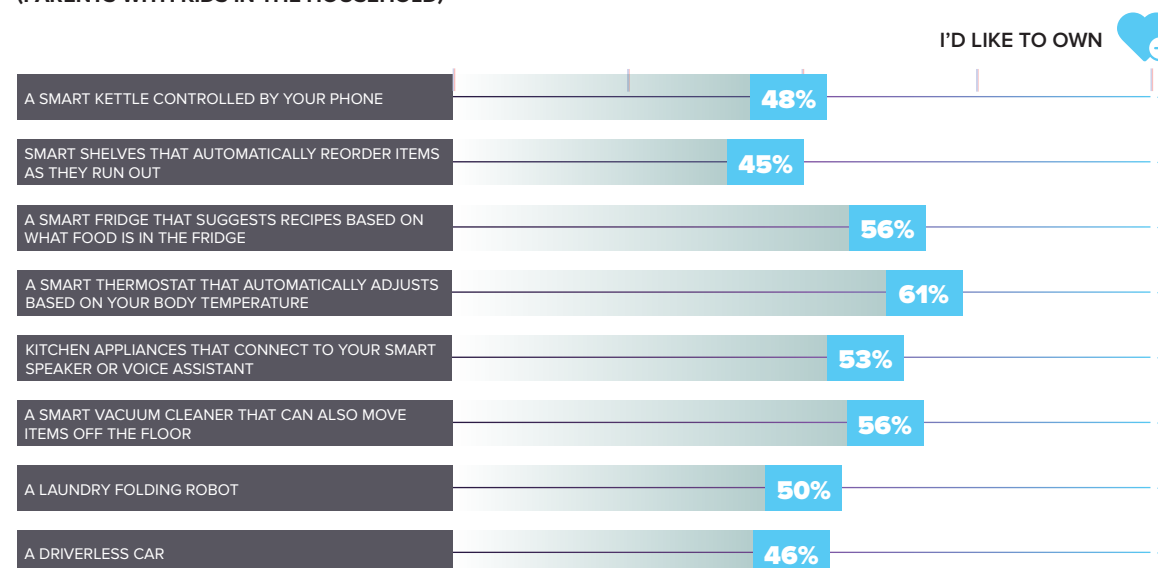
Female, Parent, Midlands



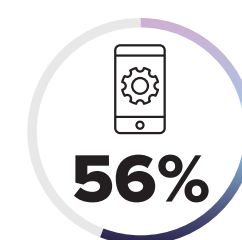
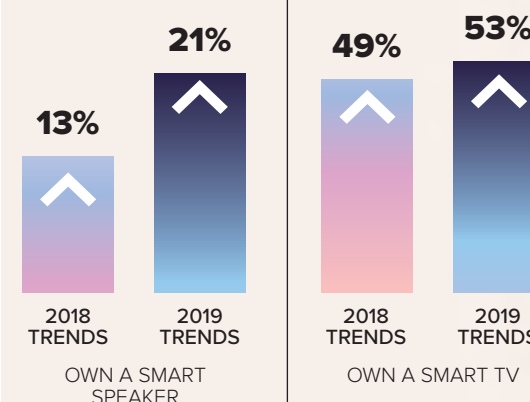
of households with kids use a smart speaker to control things in the home, versus 28% of households without kids



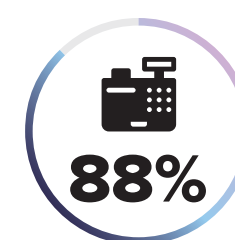
WHAT WE WOULD LIKE IN OUR HOMES (PARENTS WITH KIDS IN THE HOUSEHOLD)



SMART SPEAKER VS. SMART TV



of parents agree ‘smart’ devices give them more control over their lives



have used self-check out



use same day delivery services – rising to 72% for those living in urban areas

“The only thing with tech doing everything for us is that you lose that sense of accomplishment that you get when you do something yourself.”

Male, 55+, London

“Is it making us more impatient though, or is it making us more savvy with our time?”

Female, Parent, Manchester

BACK IN THE REAL WORLD FUTURE SCOOPING

When people are asked what would help them to save seconds in the future they tell us about their automated dream home (that they ultimately still control!). For example, a house that fills a bath to the right temperature for when they arrive home, a fridge that lets them know what they need to replace and orders it for them, or an alarm that sets of a series of actions around the house to ensure they are up in the morning. Robots played a big part in their imagined home of the future, but in reality everything they need is going to be delivered by AI and connected home products in the same way. In terms of payment methods, people are now really starting to appreciate the time and convenience these technologies provide, but they are also aware that there is more to come. For example, they are also able to envisage a future of buying through Virtual Reality and are aware that cryptocurrencies such as Bitcoin could be the future. VR payments are unlikely to be widely adopted any time soon, but there are other things people find it easier to imagine that are not far from reality – no cash, tills with facial recognition inbuilt, an iris scanning payment system or even an implanted chip on our hand that is recognised as we walk out of the store.

54%

think that in the next ten years, robots will do all the everyday tasks we hate in life - millennials in particular love this idea

"I think everything is going to be contactless, literally. We'll be like the royal family, we won't carry money."
Male, Millennial, London

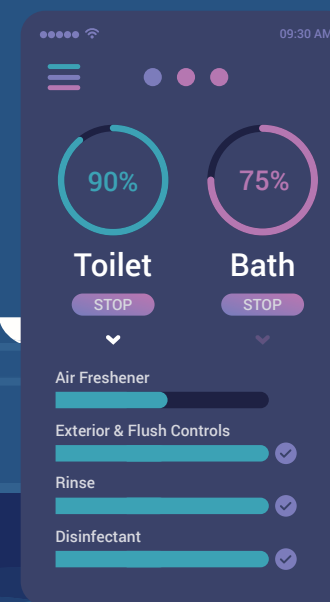
Those stacked for time, or perhaps just juggling too many things, want to evolve themselves into part human, part machine with a microchip in their arm for actions such as payments.



59%

of Londoners expect that in the next ten years all surfaces will become digital interfaces, compared to 45% of those in the rest of the UK

People imagined a luxurious future where they will arrive home and the dinner will be on the table, but this time cooked by robots while they were out.



As people thought more about this, they began to image their entire home working for them by cleaning itself and being controllable through their mobile.

WHAT IS IT?

real or replica?

In a world of growing mistrust, where tech is presenting us with curated social media, fake videos, voice assistants and virtual entities, people are re-evaluating who is real and who is not

WHERE HAS IT COME FROM?

It used to be a lot easier to know what was real and what was fake. What was true and what was a lie. But the events of the last few years have made many of us question these old certainties. The long-term decline of trust in institutions, brands, and above all, politicians has been well documented. The financial crisis of ten years ago, followed by a decade of austerity and increased inequality, has challenged liberalism across Europe and the US. Events exploded spectacularly in 2016. Trust in authority was further undermined by the influential power of a social media model that rewarded content engagement over quality or veracity. The US election and EU referendum provided a specific focus for this distrust to flourish,

resulting in fake news, bots and the concept of post-truth being introduced to the world. Meanwhile, technology has been busy redefining boundaries for us as well. The rapid developments in the application of AI to conversational interfaces has meant that our relationship with technology has changed, becoming more sophisticated and complex. The boundaries between reality, the fake and the virtual are becoming increasingly blurred. People are not only questioning how they feel about this, but in some cases are re-evaluating and choosing the virtual option, where by being genuinely fake it is at the very least, transparent.





HOW IS IT DEVELOPING?

FAKE IT

With the rise of fake news and bots, many people are now finding it increasingly hard to work out what's real and what's fake, with nearly six in ten of the people we interviewed claiming 'It's getting harder to separate what's real and what's fake'.

With areas spanning from politics, through to news, through to our friends' lives – or if we're being very honest, even our own lives at times – over half of the people we interviewed expressed concerns that a lot of the information they were exposed to online was now made up. Everyday reality is becoming distorted and hard to trust for many.

As we scroll through our social newsfeeds we're presented with the edited and filtered highlights reels of our friends and family, so it's no surprise that nearly four in ten feel 'everything on Instagram is fake to some extent,' and are now consuming online content from a starting position of mistrust, rather than an opening assumption of honesty and good faith.

This scepticism is likely to be further challenged in the coming 12 months. So far fake news has largely been confined to the written word or simple clickbait images. The application of machine learning and open-source software to audio and video is now leading to the emergence of an even more insidious form of misinformation – deepfakes. These are entirely fake videos, built from existing footage or pictures, that are largely undetectable as fakes to the viewer. One of the best known examples to date was a concept built by University of Washington computer scientists based on Barack Obama's weekly televised White House addresses (see 'In This Space').



Deepfakes are just one example of how technology in the hands of malevolent actors and social media's systemic bias towards the sensationalist are combining, resulting in ever increasing levels of uncertainty over what's real or fake.

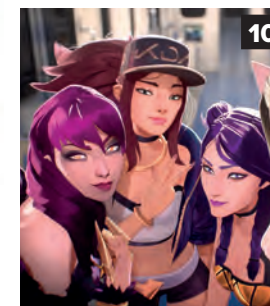
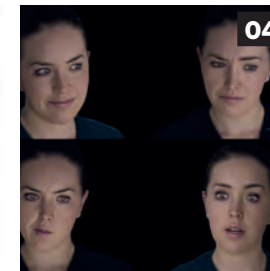
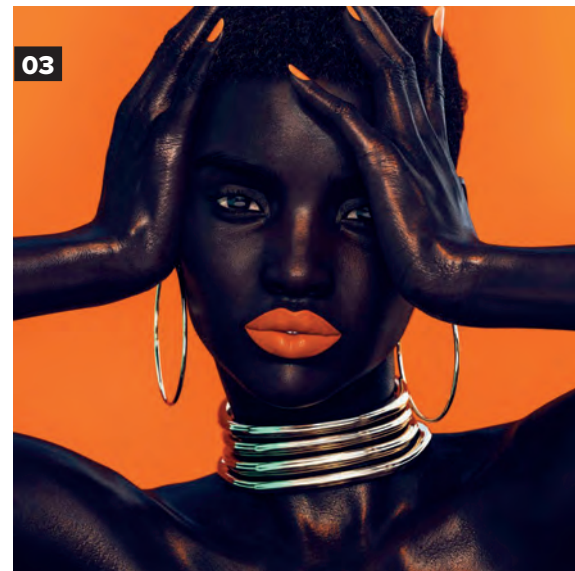
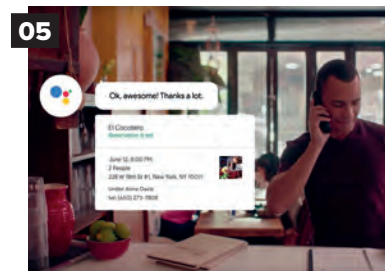
VIRTUAL RELATIONSHIPS

With concerns growing for many around what is real and what is fake, the virtual is at least reassuringly direct and simple. When you can never be sure what's true, perhaps the only place for certainty and safety is in what's genuinely unreal or virtual. Virtual relationships are starting to offer people a form of escapism from the uncertainty and mistrust of the rest of their lives. The recent emergence of virtual influencers on Instagram like Lil Miquela (1.5 million followers) sharing style advice with striking hyper-real imagery demonstrates just how popular this area is now becoming. Whereas a constant stream of tweaked images from friends showcasing the best bits of their lives might leave people feeling a bit inadequate, a virtual influencer's life is pure fantasy and followers know where they stand. On this basis, it's little surprise that a third of 18-34s say 'I follow profiles on Instagram or Twitter that I know aren't real'. We've even

seen the explosion in late 2018 of virtual K-Pop band K/DA – originally created to promote the purchase of in-game skins in League of Legends – who racked up 80 million views of their debut single in ten days, reaching top 5 on the Apple Music charts and performed live next to the actual singers at the eSports 2018 World Final's opening ceremony.

NEW MEMBERS OF THE FAMILY

The certainty that consumers are finding in virtual beings is being taken to its highest, most complex level in the changing relationships that many of us now have with our voice assistants – the smart speakers that are now part of around 21% of UK households. For many of the owners of these devices, the relationship with the voice assistant has changed how they feel and think about the tech – 44% of smart speaker owners, for example, felt that their device was more human when compared with the other technology they use, with over a third of them happy to agree that it was now 'a part of the family' (rising to 47% for parents). The trust implicit in the developing relationship people have with their voice assistants could act as respite from the mistrust so prevalent in the rest of our digital lives.



01
Tourist Board Virtual YouTuber

The Ibaraki Prefecture announced a virtual YouTuber to promote tourism, highlighting local news and things to do in the area.

02
Lil Miquela

Influencer Lil Miquela is a 19 year old Instagram influencer who has partnered with brands such as Prada and has over 1.5 million followers, but isn't real.

03
Shudu

Fenty released a photo of CGI Instagram model Shudu wearing their lipstick, receiving over 222,000 likes. The artist was forced to apologise when it was revealed the model wasn't human.

04
Soul Machine

New Zealand start-up company Soul Machine are attempting to humanise AI and chatbots by creating photorealistic avatars that learn on-the-go.

05
Google Duplex

Duplex is Google's new AI system that allows Google Assistant to make calls, such as restaurant bookings, on behalf of users.

06
Deepfake Obama

Jordan Peele created a 'deepfake' video with his words appearing to be spoken by a very realistic but virtual Obama.

07
Louis Vuitton

Louis Vuitton collaborated with Final Fantasy to bring fictional video game avatar, Lightning, to their ad campaign.

08
Xinhua Virtual Anchor

Chinese media agency Xinhua has developed a digitally generated news reader who can read in both English and Chinese.

09
Virtual YouTuber

Kizuna AI claims to be the world's first virtual YouTuber. The Youtuber now has two accounts, with over 3.4 million subscribers in total.

10
League of Legends Music Video

League of Legends uploaded a music video to YouTube featuring a virtual K-Pop group which went viral with over 94 million views in the first month.

11
Manly App

An app where users can edit their physical appearance in their images to become more 'manly', with functions such as the ability to add a six-pack.



WHERE NEXT?

Since the events of 2016 and the subsequent exposés of Russian state interference and Cambridge Analytica, social media companies have made some moves to reduce the problem of fake news, without going as far as accepting a full editorial role. But the problem of fake news is far from being resolved. Indeed, the emergence of deepfakes shows us that the technology used to enhance or distort is evolving faster than society's ability to understand, control or mitigate its effects. One possible consequence of this, is that people will essentially give up the fight and disengage from trying to separate true from false – a condition that US academic Aviv Ovadya at the Tow Center for Digital Journalism at Columbia describes as 'reality apathy'. Facing a torrent of

misinformation, people may give up on trying to work out what's true and "People stop paying attention to news and that fundamental level of informed-ness required for functional democracy becomes unstable."

Another path may be that we see cynicism deepening further, with the question of something's veracity skirted over, as long as it meets the individual's needs or preconceptions – what could be called the 'alternative facts' approach. Already a third of 18-34s say that "If I agree with something on social media, I'll like or share it even if I know it's fake". Playing fast and loose with the truth may become even more common.

This disillusionment with reality is likely to also deepen consumers' relationships with the virtual in the years to come. Advances in AI will also make conversations with voice assistants or other virtual personalities more sophisticated and more rewarding for users. The acceptance that digital assistants such as Google Duplex should declare that they are not human when interacting with other people on behalf of the user, will reassure people about their relationship with these virtual creations. Virtual relationships may also come to be seen as a way to deal with

the increasingly recognised problem of loneliness, as is already the case in Japan where virtual companion Azuma Hikari is marketed to lonely young men. People who rarely see their elderly relatives may start giving them a virtual companion. And we may find significant proportions of the population spending time in virtual reality environments, not necessarily gaming or connecting with friends, but socialising with virtual companions freed from the mistrust, misinformation and uncertainty of the real world.



WHAT THIS MEANS FOR BRANDS

01

TIME TO REAPPRAISE INFLUENCER STRATEGIES?

As mistrust proliferates, the power of influencer marketing may start to wane. Conversely, perhaps virtual influencers where any brand endorsement is nakedly transparent may become more influential. Either way, as consumers' relationships with the truth and reality evolve in the post-truth era, brands will need to reappraise the role of influencers.

02

BRANDED ESCAPISM FROM REALITY

Brands can look to take part in or even provide the virtual havens from misinformation that consumers are seeking. Brands could create their own virtual personalities or influencers and seed them within social or messaging environments.

03

EMBRACE TRANSPARENCY

If brands are to rebuild trust in an era when mistrust and suspicion abound, they will need to close the gap between the brand promise and reality. As consumers understandably suspect brands and big business have something to hide behind their shiny communications, brands will need to become increasingly comfortable with opening themselves up to scrutiny and inspection. Allowing people (journalists, pressure groups, CSR auditors, Joe Public) greater exposure to how they operate will help close the discrepancy between promise and reality that breeds mistrust.

04

BUILD YOUR DIGITAL PERSONA

If people are going to be increasingly comfortable flitting between the real and the virtual, and indeed find virtual relationships more attractive in some circumstances, then brands will need to think about how they interact with customers in virtual spaces (e.g. voice, AR/VR, bots). Brands are in many ways already virtual concepts, living as a mental construct, representing our perceptions and experiences with products and services. Brands will need to come up with ways to deliver virtual experiences that help convey the brand meaning in a way that fits with people's desire for certainty in an uncertain world. That means developing interactions in virtual environments, with clear characteristics and personas, that deliver an authentic (yet ephemeral) experience. Not easy!

05

REASSESS HOW YOU ARE USING VOICE ASSISTANTS

People are becoming increasingly attached to their voice assistants as they play a bigger part in our lives. It's not just about building a skill or an action. Think about how human your proposition is. How will it relate to people in the context of how they feel about their voice assistant?



Sean Pillot de Chenecey
Insight/Strategy
Consultant, and author of
'The Post-Truth Business'

Organised disinformation is indeed a growth business, but we're mistaken if we think that living in a media landscape where the truth is deliberately manipulated is a new problem. When it comes to state-sponsored misinformation, then classic examples can be traced back to the era of Stalin. And when it comes to the entertainment industry, questions over our emotional connections with 'real-fakes' have always been centre-stage; from the earliest days of Hollywood, to the Situationist intentions of Malcolm McLaren, to the film 'Her' etc. So K-Pop bands are just the latest incarnation of this issue.

Something we now know is that recognising fake news is only going to get harder; with new technology meaning that we now need to question not just what we read in the papers, but things that we see and hear in the online and broadcast media. Due to facial and speech copying technology delivering 'more real than real' image and sounds (to quote The Tyrell Corporation) this is going to become a 'Fake News Mk2' issue, with the weaponising of information moving on rapidly from the basic type of fake news and disinformation that we've unfortunately grown used to recently.

The home is an ever-greater battleground for brand, in the context of voice-activated technology and virtual assistants. These are perceived as being either welcome technology sent to make our lives easier, or Trojan Horses that can be utilised to spy on us. As the issue of privacy becomes ever more vital, brands need to answer two clear questions regarding the credibility of the trust-based consumer-relationship they need: whose side are they on, and why should we trust them.



Frazer Hurrell
Creative Technologist

As we move into a world where it will be hard to tell the difference when you're speaking or listening directly to another human, or a robot, or indeed a digitally-manipulated version of that human the question becomes as much about the 'intent' of the content as it is about the source. People will need to question if they truly believe that this person would say what they're hearing/watching. Or could this be someone else's attempt to manipulate?

Successful brands, whether they are media, FMCG or celebrity/influencer (or, indeed, politicians), are all built on trust; consumers trust that brand to serve them well and have their best interests at heart. In a time where AI technology allows fake videos to be created by bad actors, there's as many efforts by well-intentioned people to use the same technology to detect and highlight them. Allowing people to properly interrogate the source and make a decision as to whether or not they trust the intention behind the content.



Stuart Turner
Europe COO

There will come a point where you have to anchor your ship somewhere, to your sources, your trusted media, your trusted brands... and if that's a virtual being, then so be it. As humans we all crave stability and reassurance there is much more stability in something created with set parameters, however, like anything, the question needs to be asked who is controlling the virtual and for what means?

In gaming we're seeing a huge upsurge in multiplayer and co-operative games where the rules and structures are set, and people can gather together and play under the agreed rules. In an era where gaslighting is the norm, this arena offers a space where you don't have to be real but you can't fake it, as it's based purely on ability alone and cheats are called out. It almost offers a simple structure and stability in human relationships that can be trusted and relied upon in an era where that is few and far between.

The era of gaslighting will bring on an era of apathy, where nothing is trusted, the tipping point will come and I hope that people will again turn back to each other for moral reassurance, almost like a resetting of the system. Failing that we'll all just pop on our VR goggles and fall in love with whatever our virtual partner is programmed to do, while buying the brands they recommend to us.



Andrew Tenzer
Director of Group Insight

Since the birth of the internet and social media more specifically, trust has become more than just a binary measure – we now go through many layers to get to the truth (and even then we might not believe it). As a consequence, much of this trend has been playing out for some time, and has even gone mainstream. We shouldn't forget that people are the ones driving this, technology is just the enabler.

We live in a society where everything (and everyone) has to work harder to gain people's trust. In that sense, we're constantly questioning what's real or not. Our views are becoming increasingly entrenched – we know what we trust and we stick to it.

The question of who to trust leads to confusion. People's natural response is to eliminate and create shortcuts on what is and isn't trustworthy. Whilst the background noise becomes louder with the advancement of new technology, people will filter out and be quicker to discount who and what they choose to believe. This will create a stronger implicit trust with those who make the cut. As adoption grows, voice assistants have the potential to be our window to the world – it's feasible that they could become the only channel we trust.

01

In an online world, it's getting harder and harder to separate the real from the fake. Over half of people worry that a lot of the information they see is made up, and over a third have read posts that they later realised were fake.

02

People are looking for a guaranteed source they can trust. Six in ten people would prefer a single source of truth over having access to a wide range of information, whether it's real or fake.

03

However, people (especially millennials) will still share fake things if they are entertaining, and do not care where they came from.

04

Four in ten people reading content on social media start with an assumption that it's not true – rising to half amongst high tech consumers.

05

Almost half of parents feel that their smart speaker is part of the family, with the majority believing their smart speaker is more human than any other device that they own.

06

With exposure to virtual celebrities still at relatively low levels, people are currently more comfortable with the idea of virtual and tech entities that are designed to help us with functional tasks – three in ten would prefer a robot personal assistant over a human to organise their lives for them.

07

People are aware that unattainable and idealised lifestyles on social media have the potential to perpetuate anxiety and insecurities, particularly in younger people and children.

08

Despite this, people don't always portray their own lives accurately. Just under half of millennials agree their social media profiles showcase only the best aspects of their lives.

09

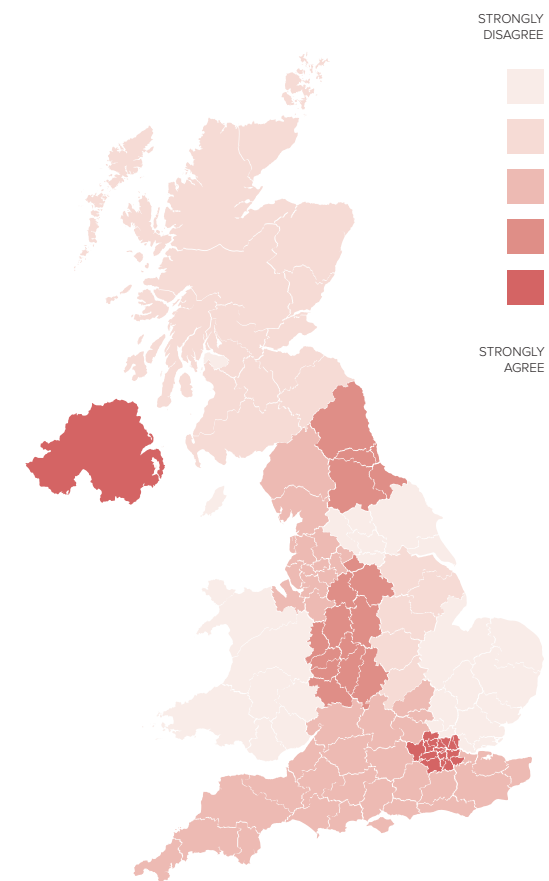
Parents have concerns about their children looking up to virtual celebrities, particularly when they don't know how these 'role models' are created. Many are uncertain if a real person sitting behind these entities would be better than if it was an AI creation.

10

It isn't hard for people to envisage a future where virtual entities become so realistic that we can have meaningful connections with them that feel real to us.

DEEP FAKE

I am hearing more about videos of celebrities or politicians that people are creating with AI



EMOTIONS

How do you feel about where this topic could go in the future?

EXCITED
4%



ENTHUSIASTIC
4%



INTERESTED
12%



INDIFFERENT
26%



APPREHENSIVE
20%



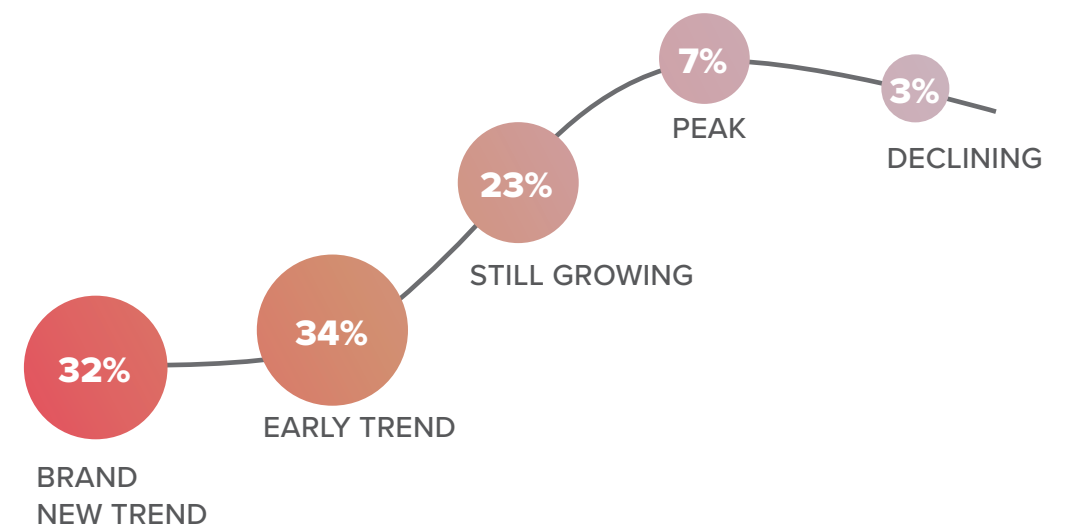
UNCOMFORTABLE
20%



WORRIED
15%

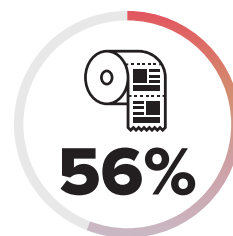


LIFE CYCLE

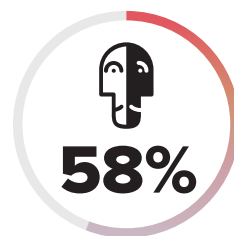


STATS & FACTS

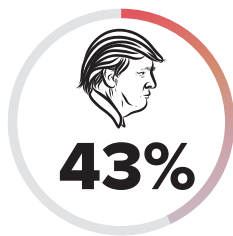
FAKE IT



worry that a lot of the information they see online is made up



say it's getting harder to separate what's real and what's fake



are hearing more about fake videos of celebrities or politicians



don't know how to tell if a news article is from a verified source or fake, and 40% have read posts they later realised were from fake accounts or bots

"When I'm on Facebook, I'm always a little unsure about stories that people share. It's hard to tell where they've actually come from originally."
Male, Millennial, North West



When reading something on social media

start with the assumption of 'not true'

"There is an overload of information being shared constantly and yet no one has access to the same news – it's literally tailored with algorithms to each individual. So we are all getting our perceived realities constantly justified and moving further away from the truth."
Female, Millennial, London

LIVE

FAKE NEWS

Female
Millennial, London

"I just think I would like just one media source that guarantees that what is being said is the truth."

VIRTUAL RELATIONSHIPS

44%

of smart speaker owners say that it feels more human than any other device they own – rising to 54% for Londoners

33%

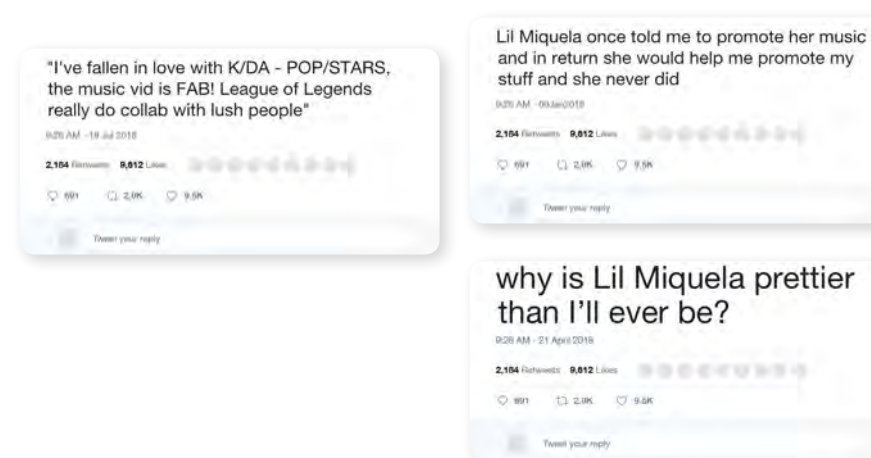
of millennials will share something on social media if they agree with it, even if they know it's fake

32%

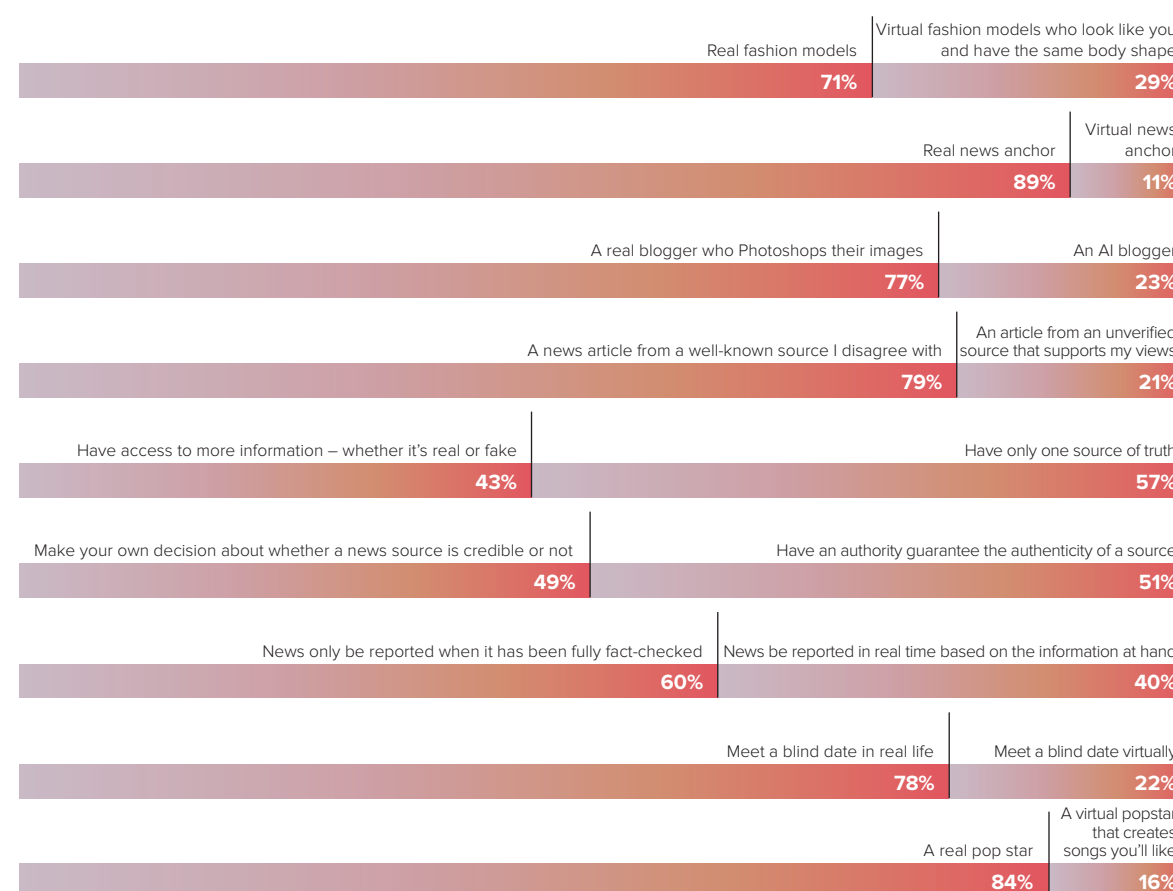
of millennials follow profiles on Instagram or Twitter that they know aren't real

31%

don't care if a picture online has been enhanced with filters or Photoshop – rising to 44% for millennials and 45% for Londoners

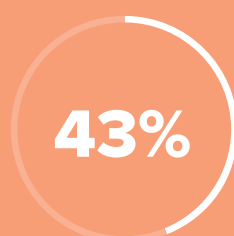


WHAT WOULD WE PREFER?



BACK IN THE REAL WORLD FUTURE SCOOPING

When we spoke to people about the future of this trend, several had never heard of deepfake videos and were yet to come across any virtual beings, such as influencers, so found this one hard to grasp. But there was real awareness amongst younger audiences and it was amongst this group that imaginations ran wild. Holograms played a big part in how they see the future for this trend, for example. Despite other people's lack of awareness, once they knew of the possibilities, they could also imagine the ways in which our real world could take on a new virtual identity. Those users of virtual assistants could totally understand how we could develop more emotional attachments with them in the future. Transparency was also talked about at length and many could see us becoming more skeptical in the future, asking for more and more information to verify the truth.



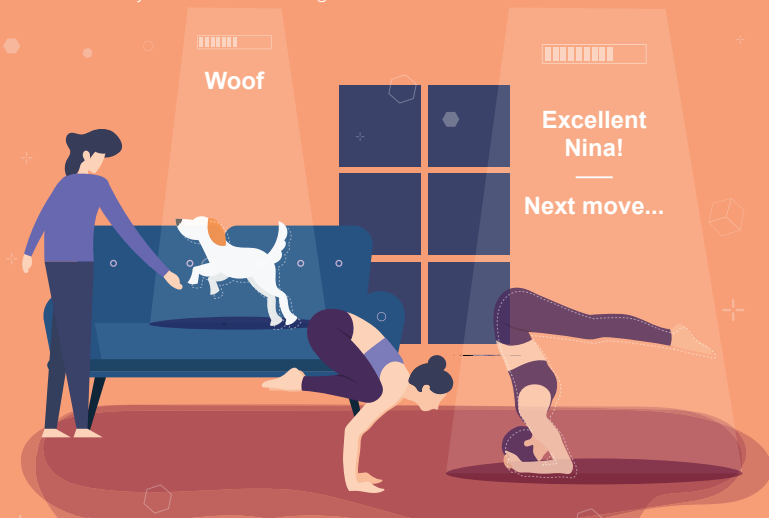
think that in the next ten years, virtual entities and holograms will be all around us, rising to 53% amongst the tech savvy



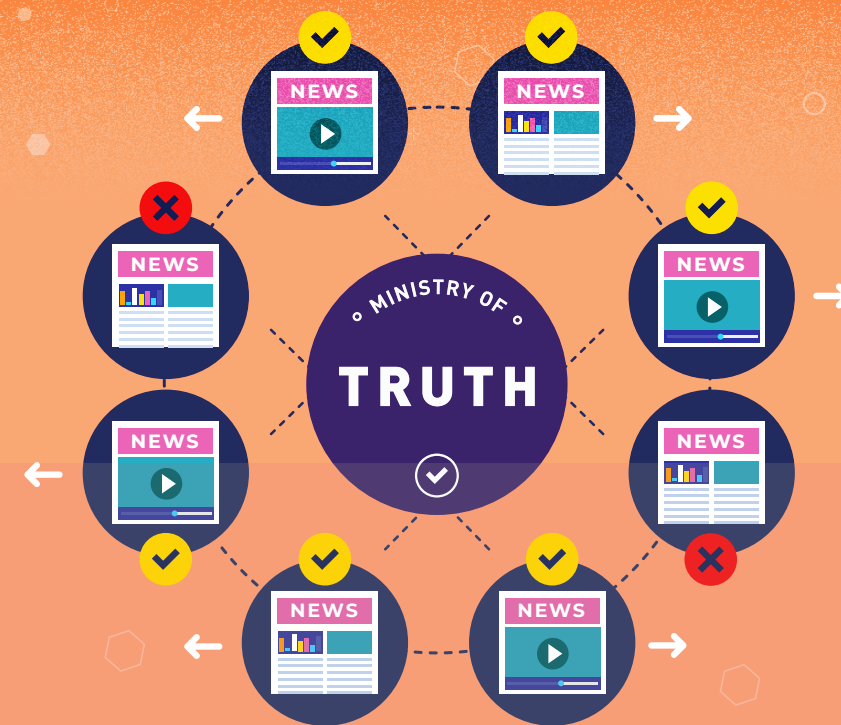
expect that in the next ten years we will assume everything is fake and will need proof that it is true – rising to 63% of Londoners

"I think transparency is going to just increase. You're going to see everything. Everybody will know everything. Transparency will be at its highest."

Male, Gen Z, London



Virtual entities won't just be in the sky but in our homes as people begin to use replicas in place of the real thing, such as pets and yoga instructors, to save money, time and, in some cases, responsibility.



A little help can go a long way when deciding between the legitimate and the fake. Our panelists proposed a 'Ministry of Truth' used to certify news with a genuine stamp if it's trustworthy.



One panelist imagined a future of politics where Theresa May appears as a hologram in the sky telling the latest news to people all over the UK.

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