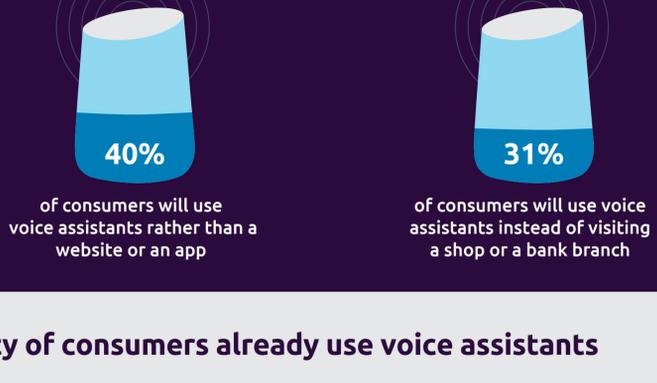


Voice assistants are about to revolutionize commerce

Voice assistants will become a dominant mode of consumer interaction, three years from now



Majority of consumers already use voice assistants



Users of voice assistants have already been adopting them for making purchases



Source: Cappgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 2,558 users in the US, UK, France and Germany.

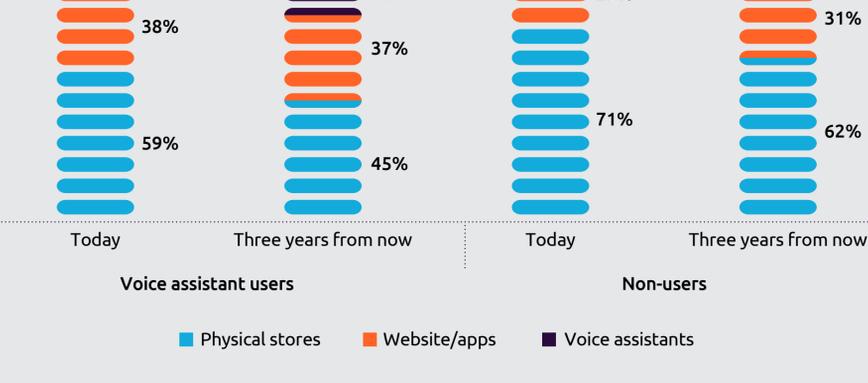
Leading retailers and brands have sensed consumer interest and launched voice shopping for products and services

- Walmart** partnered with Google to launch its voice platform to allow consumers to shop more than two million Walmart items through voice.
- The French cosmetics retailer, **Sephora**, recently launched its app on Google Assistant, allowing consumers to book beauty services.
- Ocado**, the British retailer, launched voice ordering capability on Amazon Alexa in August 2017.
- Early in 2017, **Starbucks** launched voice ordering capabilities via mobile app and a reorder skill on Amazon's Alexa platform. Users can simply say: "Alexa, order my Starbucks" to order their usual items.
- Capital One** launched an Amazon Alexa Skill to allow consumers to access their account information and even pay their credit card bill through voice commands.

¹ Company websites and news articles

Consumers will be voting with their wallets in favor of voice assistants over other channels

Spending via voice assistants is expected to grow as much as sixfold in three years for users of voice assistants



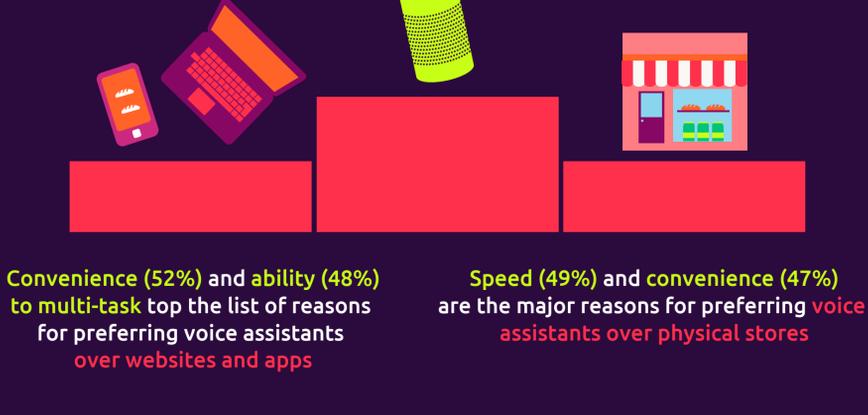
Source: Cappgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 5,041 consumers in the US, UK, France and Germany.

Conversational Commerce can be used to enhance the relationship between the retailer and consumer in the store



Why consumers love voice assistants

Consumers like the convenience, speed and the ability to multi-task



Conversational Commerce yields concrete benefits for retailers and brands

Positive word-of-mouth

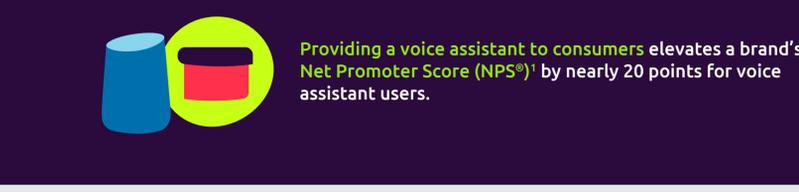


More business

- In return for receiving a good voice assistant experience:
- A third of users have transacted more frequently with the brand, at least a few times, and
 - Users are willing to increase their spending by 8%, on average.



Higher consumer satisfaction



How can retailers and brands devise a sound Conversational Commerce strategy?

Organizations need to focus on four key areas for building a robust Conversational Commerce strategy



Source: Cappgemini Digital Transformation Institute Analysis.

¹Net Promoter, NPS[®], and the NPS[®]-related emoticons are registered service marks, and Net Promoter Score and Net Promoter System are service marks, of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld