

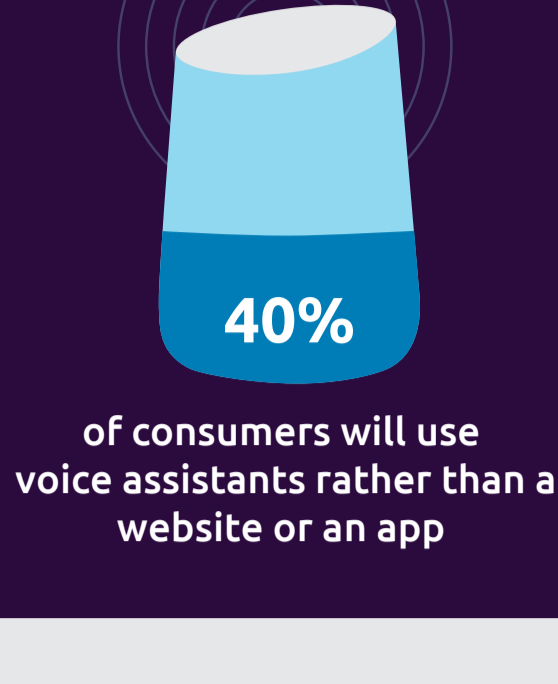


Conversational Commerce

Why Consumers Are Embracing Voice Assistants in Their Lives

Voice assistants are about to revolutionize commerce

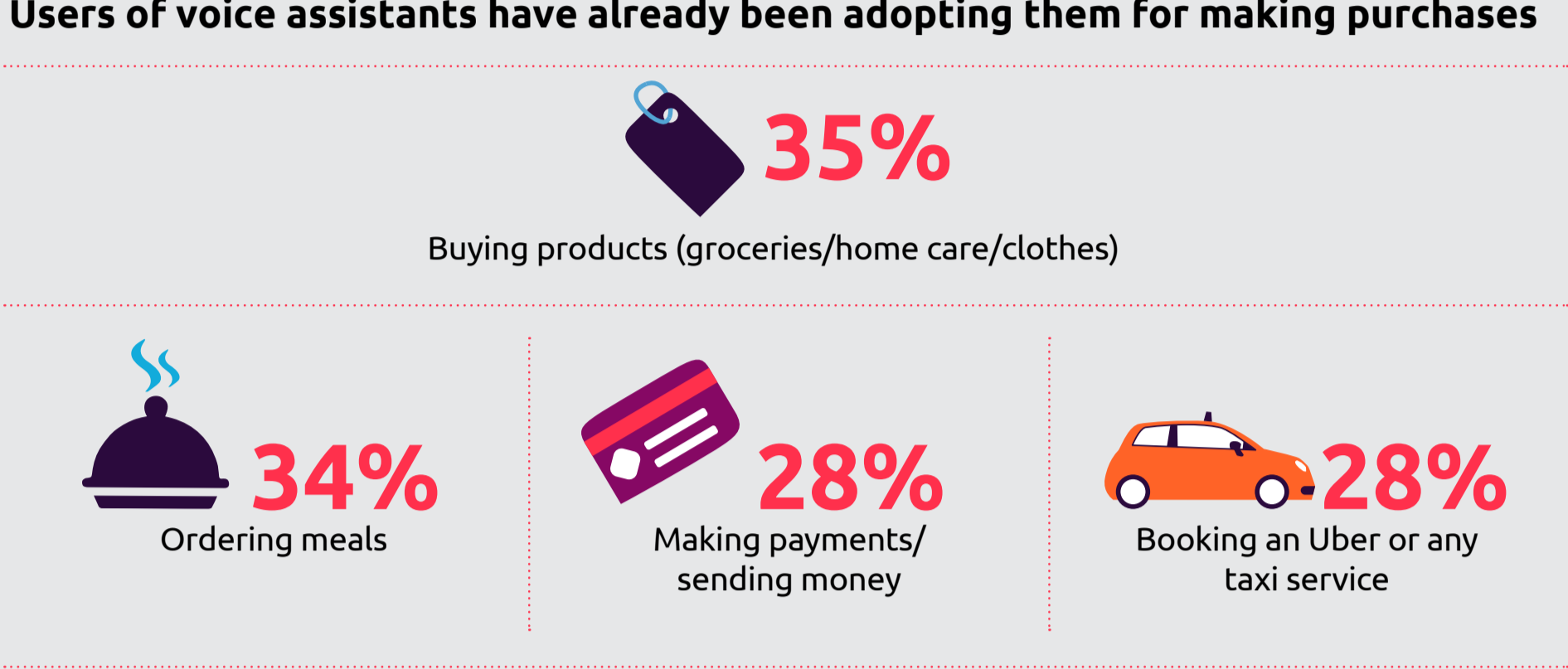
Voice assistants will become a dominant mode of consumer interaction, three years from now



Majority of consumers already use voice assistants



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



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

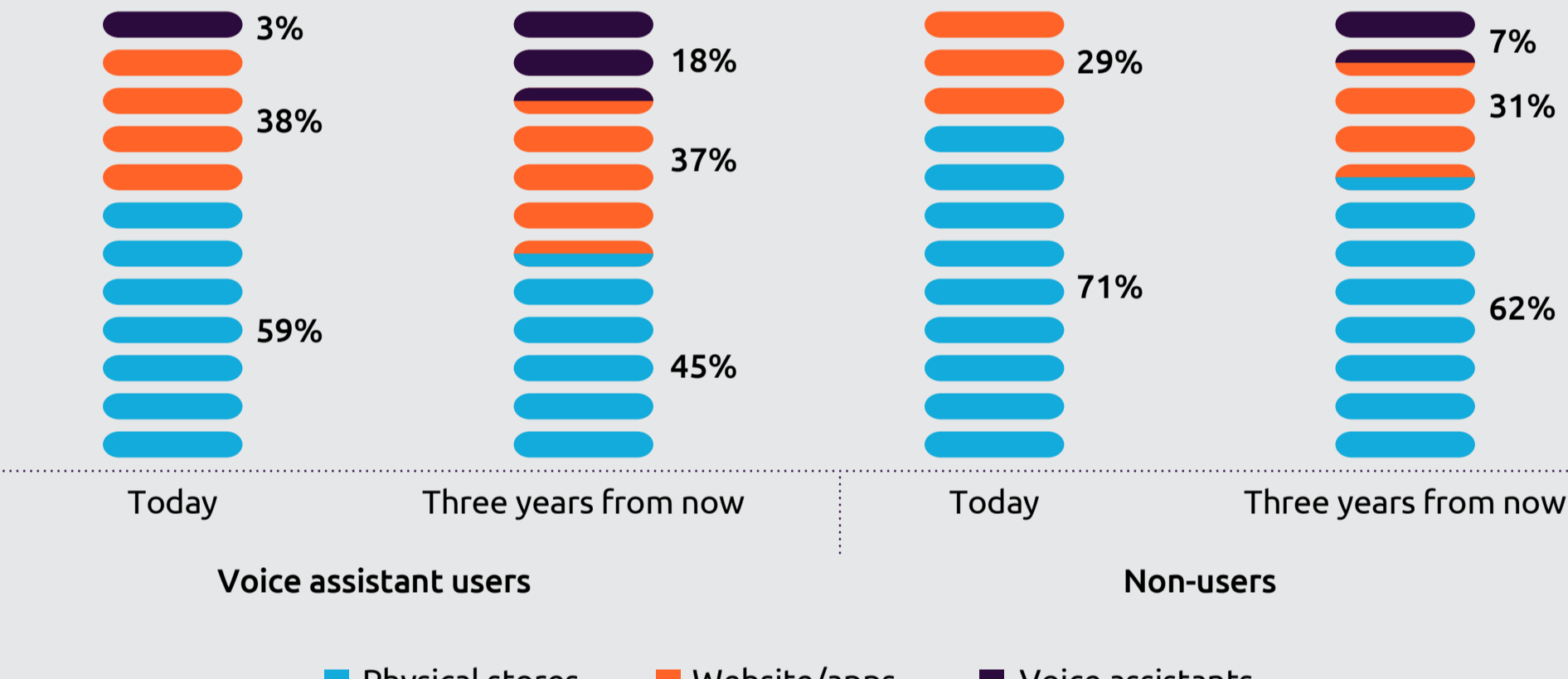
Leading retailers and brands have sensed consumer interest and launched voice shopping for products and services

- 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.
- 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.
- 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.

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 voices assistants



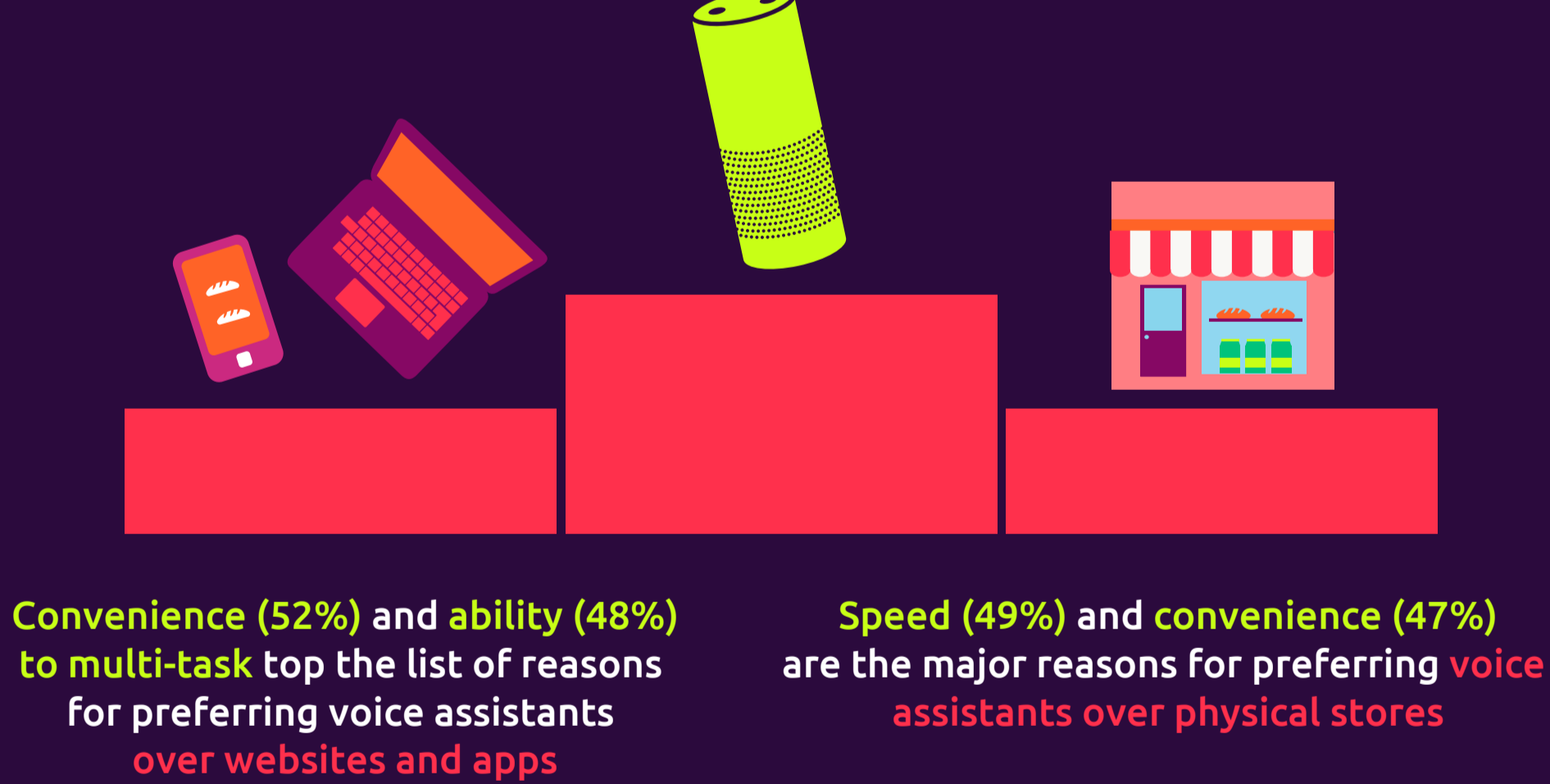
Source: Cappgemini Research Institute, Conversational Commerce Survey, October–November 2017, N = 5,041 consumers in the US, UK, France and Germany.

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

On having a good experience with a personal voice assistant, more than a third of users have shared their positive experiences with friends and family.

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

Providing a voice assistant to consumers elevates a brand's Net Promoter Score (NPS)¹ by nearly 20 points for voice assistant users.

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

Start small and have an iterative approach to solve for four key areas of Conversational Commerce

- Design and execute compelling voice customer experiences
- Apply conversational intelligence to understand your target consumers
- Devise sound business operations voice solutions
- Implement technology solutions that seamlessly integrate voice

Prepare the organization for the new voice channel

Source: Cappgemini Research 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