

Press contact:

Priyanka Roy

Tel: + +91 900 454 1119

E-mail: priyanka.a.roy@capgemini.com

Capgemini research shows 95% of drivers will use an in-car voice assistant in the next three years

Consumer appetite for interactive in-car experience soars, but concerns over privacy, data security and user experience remain

Paris, November 14, 2019 – Almost every driver (95%) will be using a voice assistant in the next three years, but automotive companies must improve the experience to meet user expectations, a new research report from the [Capgemini Research Institute](#) has found.

The "[Voice on the go: How can auto manufacturers provide a superior in-car voice experience](#)" report looks at the consumer adoption of the in-car voice experience and their expectations. It identifies the opportunities for automotive companies to grow revenues and boost engagement through voice technology, but also finds that the industry rates the current performance of voice assistants more highly than consumers. Key points from the study include:

In-car voice assistants are being widely used, a trend set to accelerate

Almost half (49%) of consumers surveyed are using voice assistants in their vehicles for a variety of functions; this figure is expected to surge to 73% in the future. At present, 77% of consumers use voice to play music and check directions (this is expected to rise to 85% in the future), 46% book appointments for their vehicle to be serviced (set to rise to 74%) and 45% order specific services such as food (set to rise to 72%). Within the next three years, 95% of consumers expect to be using a conversational assistant, including a voice assistant in the car to access information, 54% of them "all the time."

Consumers want the user experience to improve, but have security concerns

When asked to rate their experience using in-car voice assistants, only 28% described it as "great," with 59% agreeing that "it was satisfactory, but the experience needs to be improved." A clear majority believe improvement is needed when using voice assistants to integrate with at-home systems such as temperature control (63%), providing feedback or making complaints (61%), ordering specific mobility services (60%) and booking vehicle service appointments (60%).

As well as improving the experience across key use cases, automotive companies must address concerns over privacy and data security, cites the report: 50% of consumers said they do not trust voice assistants with their personal data, and 48% that they are too intrusive and seek too much personal information.

"Voice assistants are becoming an essential part of how people experience cars, and safely manage their lives while on the move," said Markus Winkler, Global Head of Automotive at Capgemini. *"This report demonstrates how the automotive industry should be using voice as a strategic asset both to build customer engagement and grow revenues with connected services over time."*

"To make further progress, the industry needs to educate consumers about voice capabilities and data security. It must build adaptability and personalization but also more intelligence to achieve better situational relevance and better integration between in-car and at-home voice assistants to maximize value," he further added.



Voice offers revenue and customer engagement opportunities

According to the report automotive companies that can improve their voice assistants stand to benefit from both higher customer engagement and improved revenue opportunities. Customers who have a good experience with a voice assistant said they are likely to tell their friends and family (73%), rely more on the voice assistant over traditional customer service systems (65%), and subscribe to other services offered by the same automotive company (58%).

In addition, that greater engagement has the potential to translate into revenue gains. Globally, over a third of consumers (37%) said they would be willing to pay a premium or monthly subscription price for a voice subscription installed or embedded in their car and 48% said they might consider this in the future. Younger drivers were most likely to be willing to pay, including 47% of those aged 22-31 compared to 29% of 45-59 year-olds and 18% of over-60s.

The industry overestimates the capabilities of its voice assistants

Automotive executives understand the strategic importance of voice assistants, with 72% saying they are a key enabler of the organization's business and customer engagement strategy. However, the report highlights that they are currently out-of-tune with their customers about the capabilities of voice assistants. The vast majority, 81%, said that assistants "understand the consumer's needs and preferences when making suggestions," a view endorsed by only 59% of consumers. There was also a gulf between the proportion of executives (84%) and consumers (65%) who believe assistants keep improving based on a user's personalized suggestions; and on the question of whether they take context into account when interacting (74% of executives compared to 59% of consumers).

A copy of the report can be downloaded [here](#).

Report methodology

For this research, Capgemini Research Institute surveyed:

- Over 7,000 consumers using in-car voice assistants across France, Germany, India, Italy, Netherlands, Norway, Spain, Sweden, United Kingdom, and United States.
- 300 executives from large automotive organizations, across these ten countries, with revenues of more than 1 billion US dollars
- Conducted more than ten in-depth interviews with senior auto executives and voice-service providers.

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