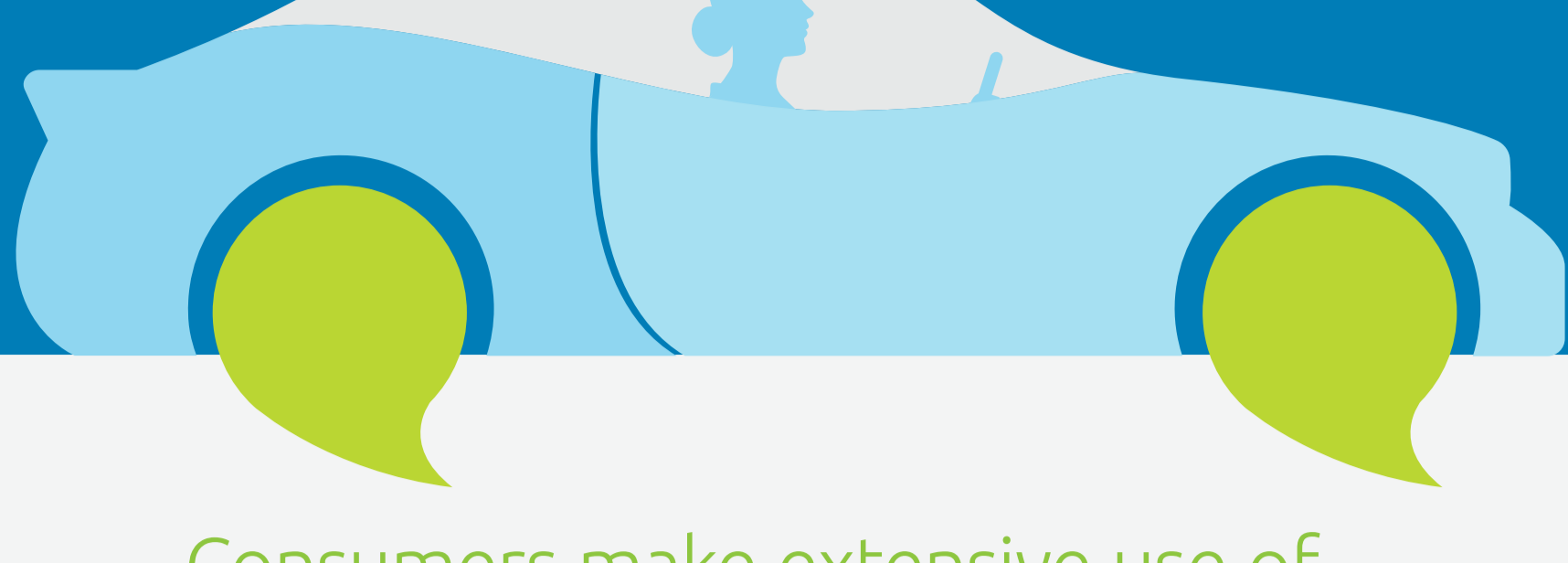


# Voice on the go

How can auto manufacturers provide a superior in-car voice experience

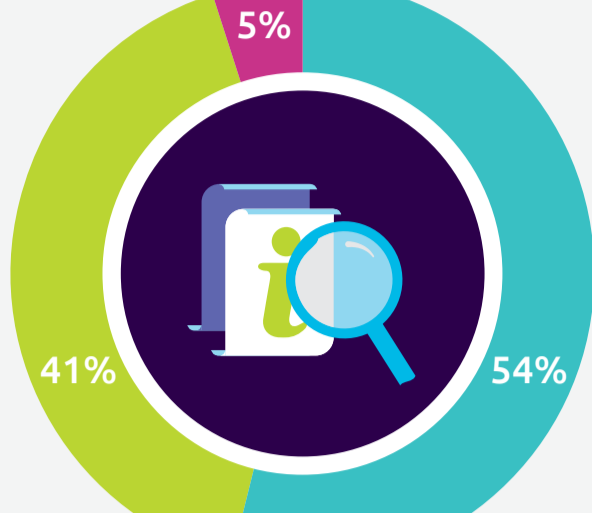


## Consumers make extensive use of voice assistants inside cars

### Usage of voice assistants will surge in the next three years

Three years from now, 95% of consumers expect to use a conversational assistant, including voice assistants, in the car for accessing information

Three years from now...



- I expect to use these assistants all the time
- I expect to use these assistants on very limited occasions
- I expect I will not use these voice assistants

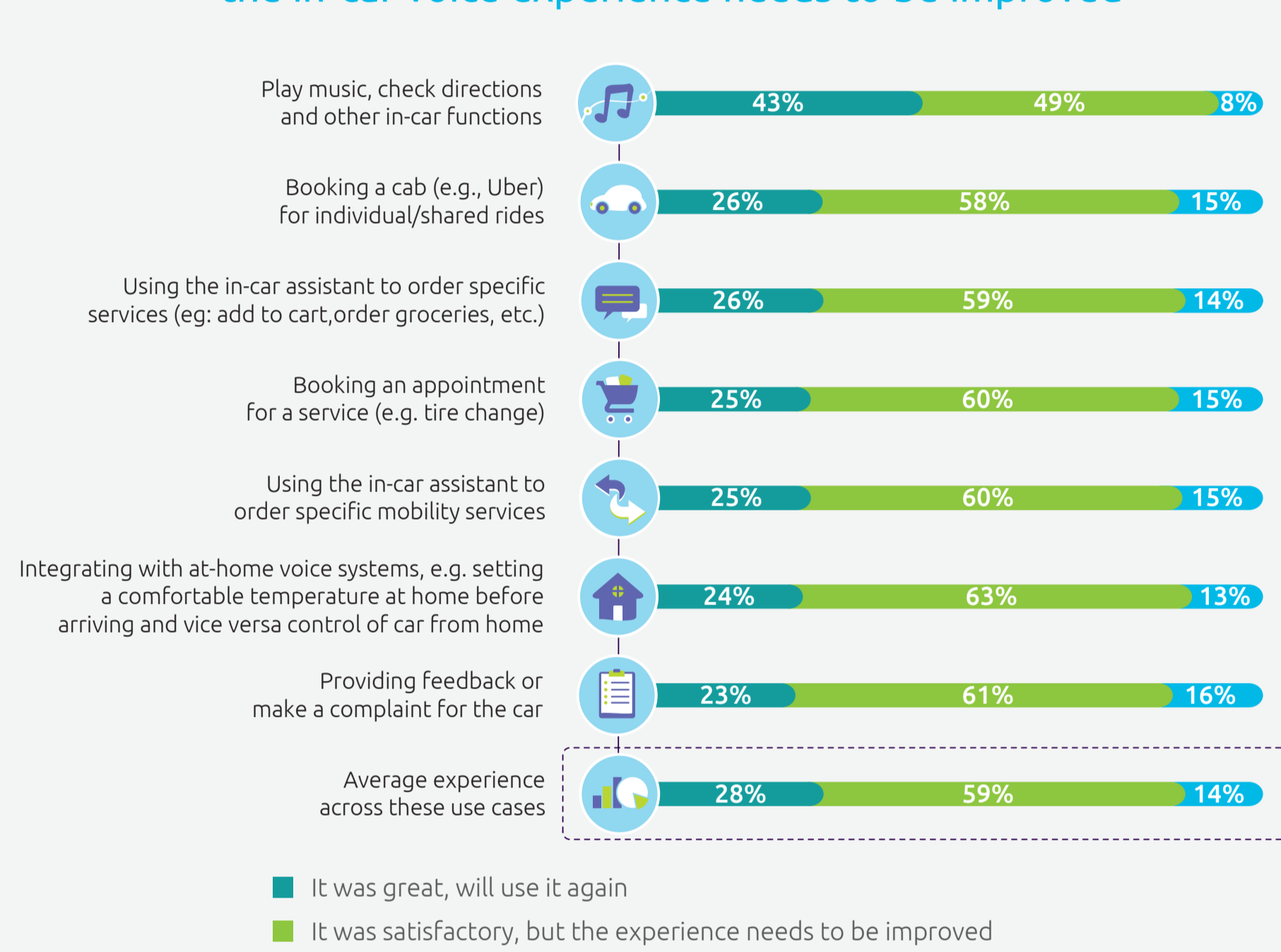
Source: Cappgemini Research Institute, Conversational Interfaces Research, Consumer Survey, April 2019–May 2019, N=7,078 consumers using in-car voice assistants.

## Voice assistants are progressively replacing direct visits and calls to dealers/showrooms



Source: Cappgemini Research Institute, Conversational Interfaces Research, Consumer Survey, April 2019–May 2019, N=7,078 consumers using in-car voice assistants.

## Despite the convenience offered, nearly 60% of consumers feel that the in-car voice experience needs to be improved

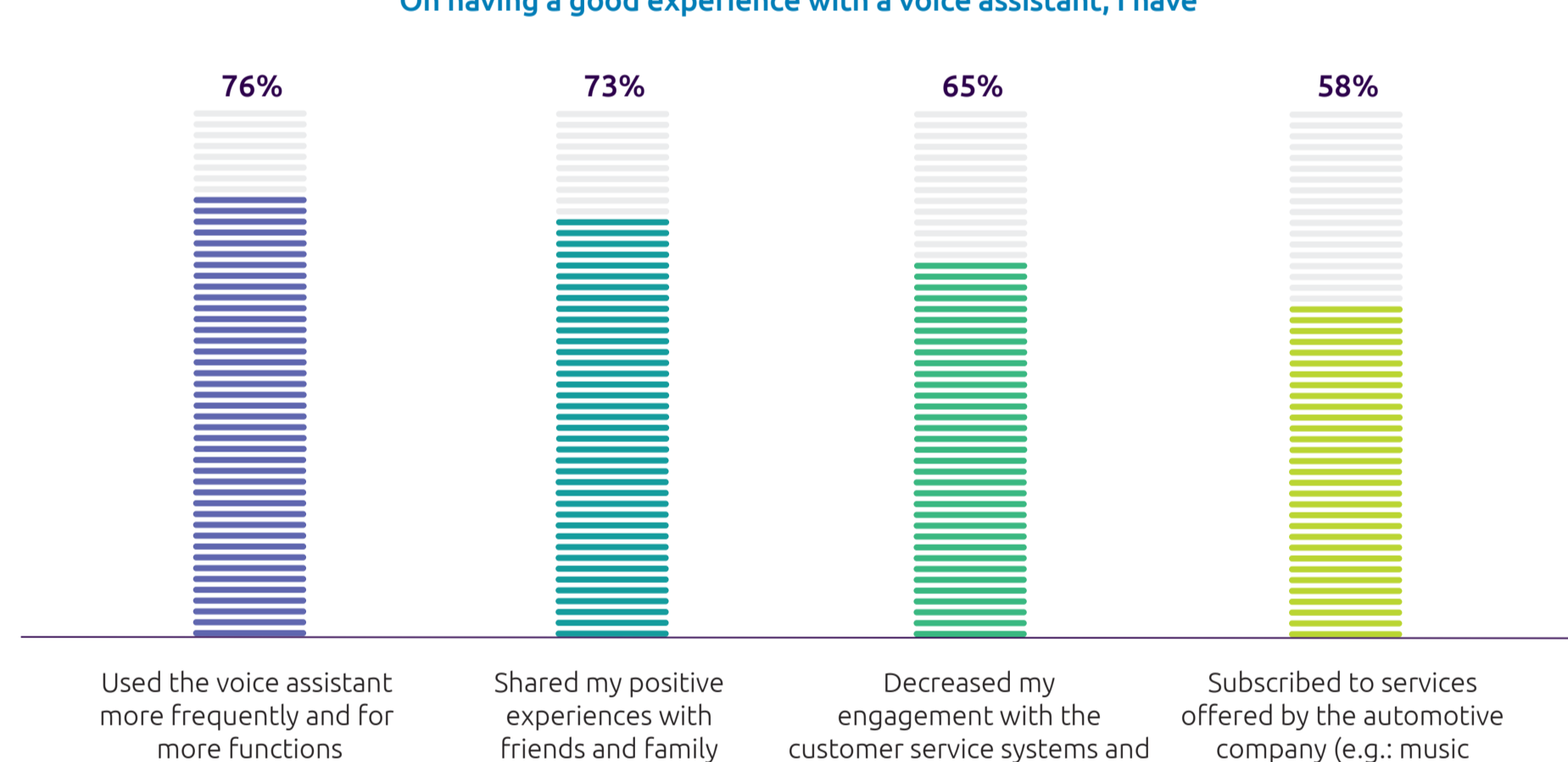


Source: Cappgemini Research Institute, Conversational Interfaces Research, Consumer Survey, April 2019–May 2019, N=7,078 consumers using in-car voice assistants.

## Automotive organizations have a great opportunity to enhance the customer experience through voice assistants

### A positive experience will drive higher customer engagement

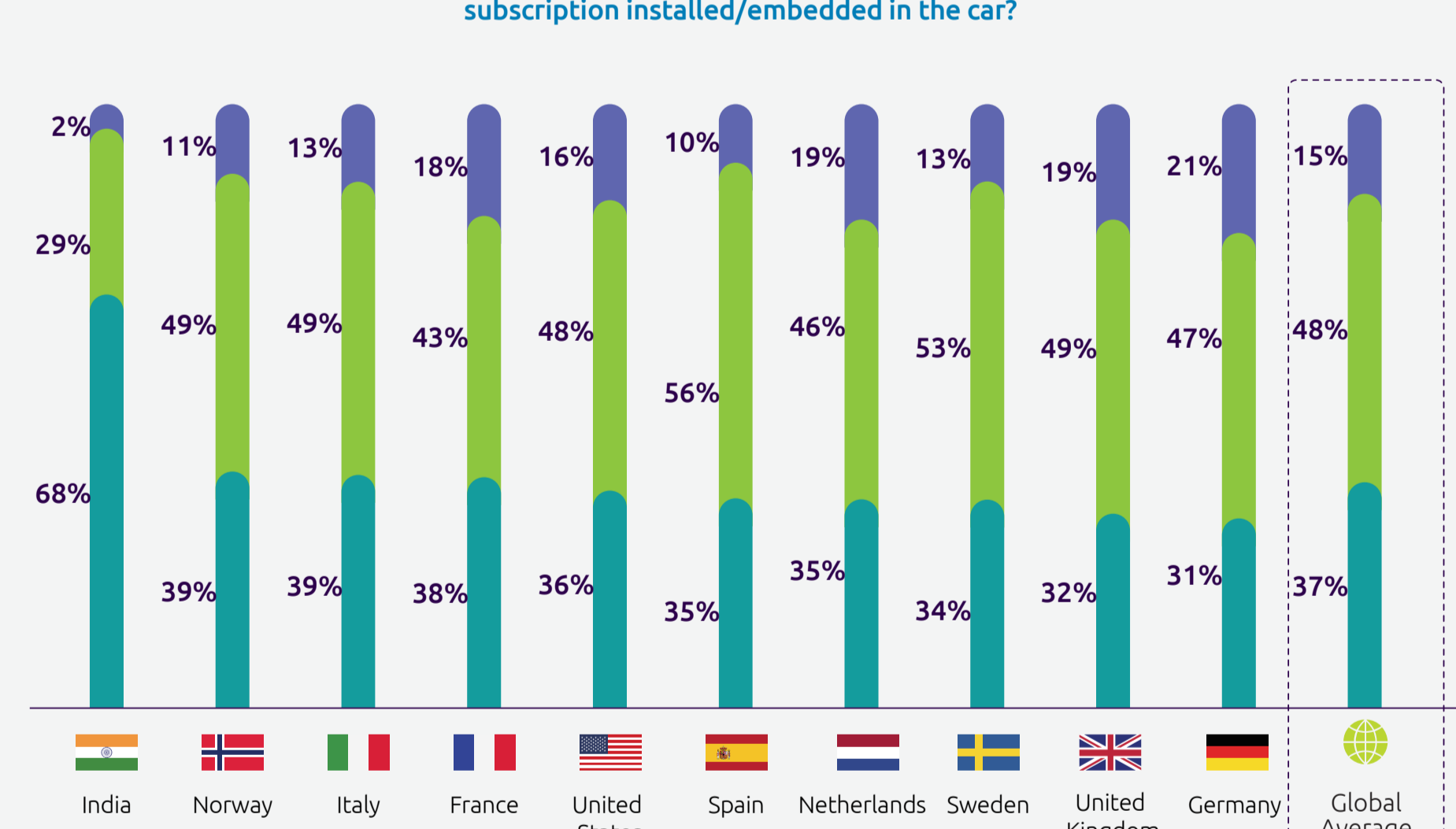
On having a good experience with a voice assistant, I have



Source: Cappgemini Research Institute, Conversational Interfaces Research, Consumer Survey, April 2019–May 2019, N=7,078 consumers.

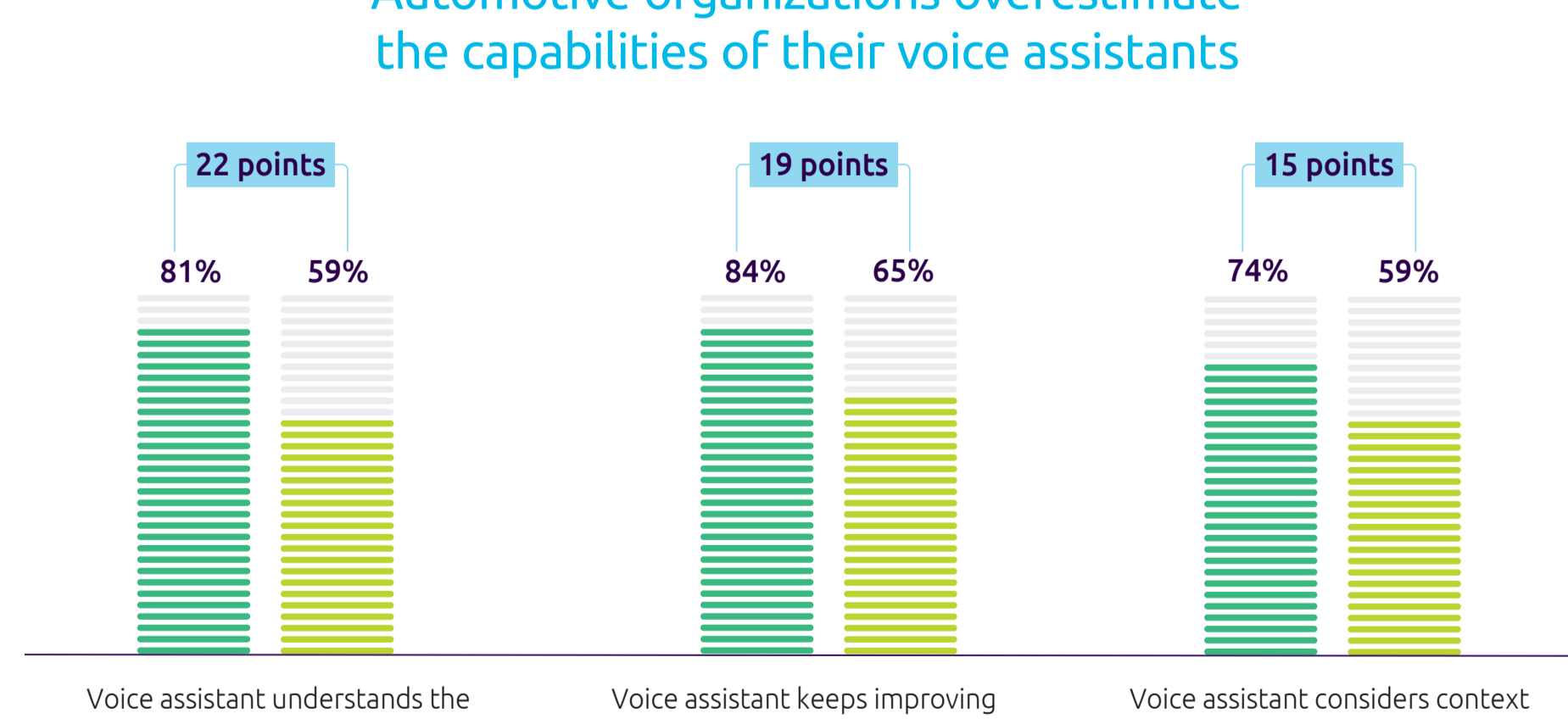
## Customers are willing to pay a premium for voice assistants

Will you be willing to pay a premium/monthly subscription price for a voice subscription installed/embedded in the car?



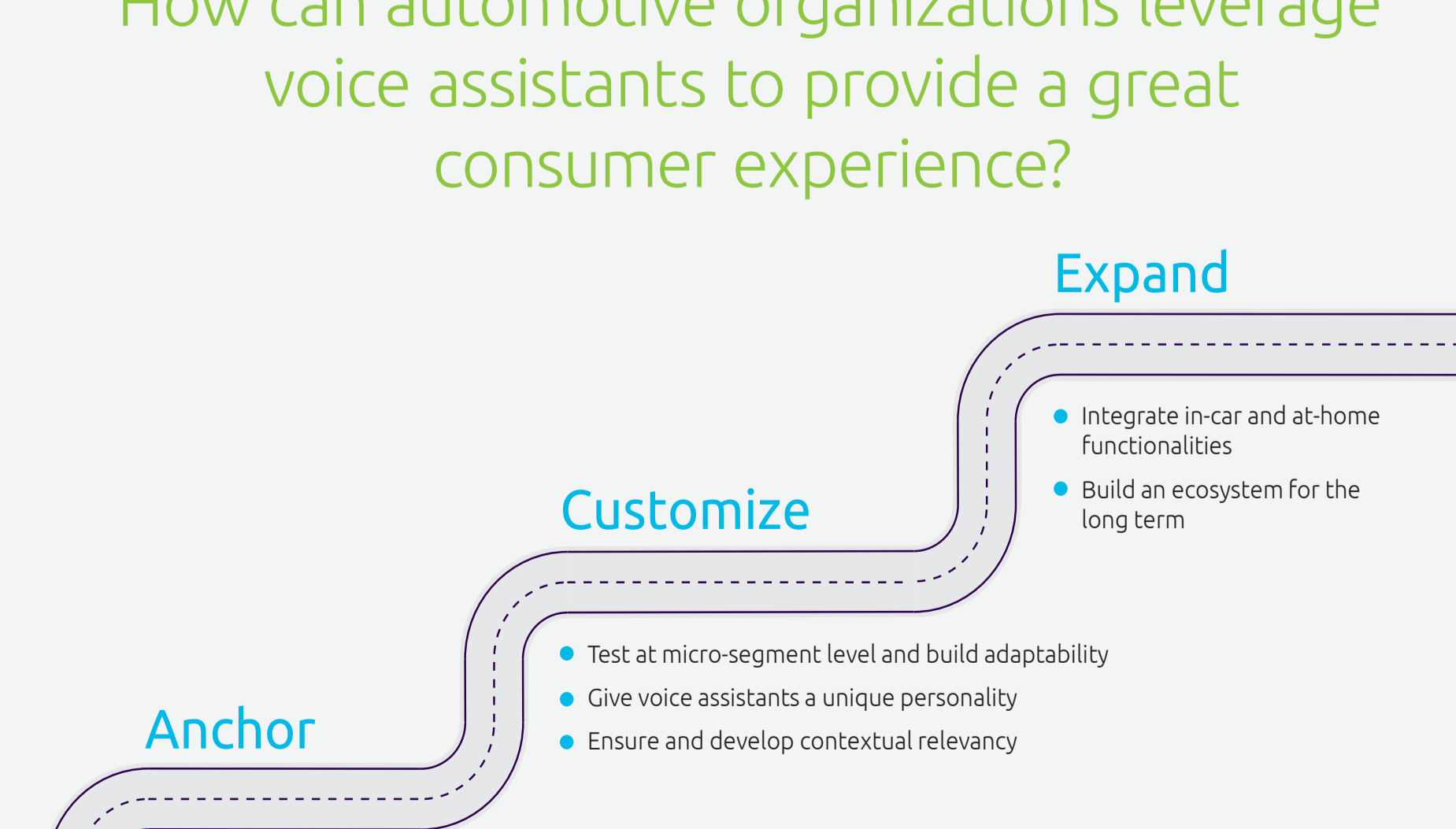
Source: Cappgemini Research Institute, Conversational Interfaces Research, Consumer Survey, April 2019–May 2019, N=7,078 consumers using in-car voice assistants.

## Automotive organizations overestimate the capabilities of their voice assistants



Source: Cappgemini Research Institute, Conversational Interfaces Research, Executive Survey, April 2019–May 2019, N=6,386 consumers, N=117 Automotive organizations.

## How can automotive organizations leverage voice assistants to provide a great consumer experience?



Sources: Cappgemini Research Institute analysis.

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