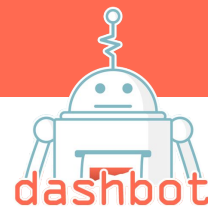


THE CONTEXT OF VOICE: IN-CAR, AT HOME, ON THE GO



OVERALL USAGE: smartphones and cars drive volume but smart speakers drive adoption

Rationale:

- Smartphones and cars have high penetration
- Use of voice in cars started in 2004, 10 years before the first smart speaker
- Americans spend 54 min a day in average day in their car

% OF OWNERS WHO USE VOICE ASSISTANTS



% OF DAILY USERS



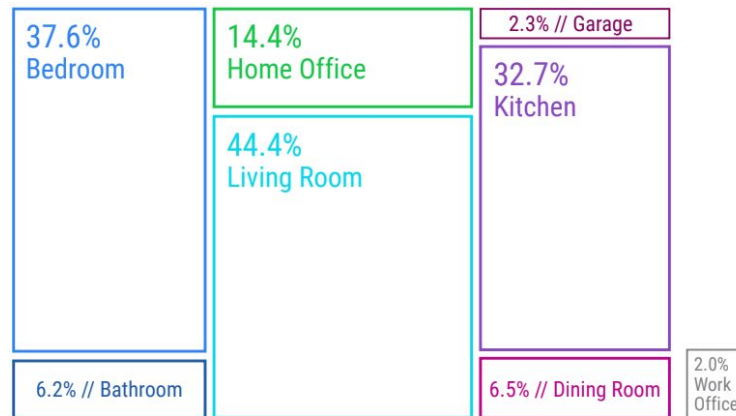
OF MONTHLY US VOICE USERS



TOP 3 USES CASES

- Play **music**
 - Ask for **weather** forecast
 - Set **alarm** or reminder
-
- Initiate **phone calls**
 - Access **navigation** information
 - Control **in-car features** (windows, temp...)
-
- Ask a general **question**
 - Ask for traffic or **directions**
 - Find a **place to eat**
- 62% while driving
21% while walking

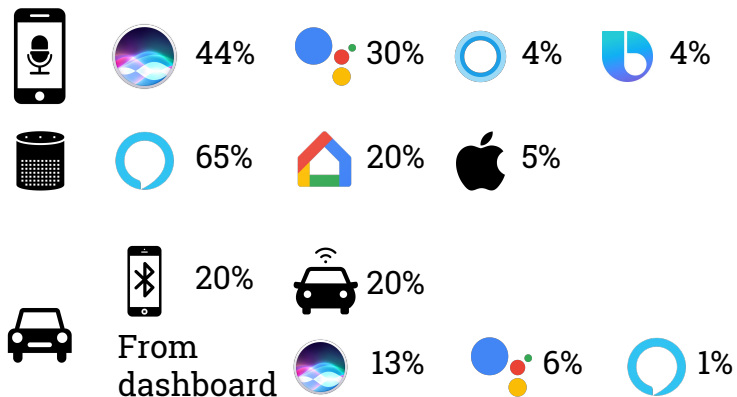
SPEAKERS LOCATIONS



Note: Multiple responses accepted, numbers total more than 100%

ECOSYSTEM:

Several layers in the car cabin



HIGH STAKE FOR CAR MAKERS

59% of drivers are more likely to buy from a specific car manufacturer if their in-home voice service is available in their car
74% for Gen Y / 79% for Gen Z

TOP 3 BRANDS BY VOICE ADOPTION

Conversion from trial to monthly voice use



IN-CAR CONVERSATION SPECIFICITIES

The specifics of driving impact the conversation paths and content

- Safety first, conversation second: At anytime the user might **need to quit the conversation** and come back later.
- **Offline** use is likely (underground garage, remote area)
- Physical constraints are **challenging for voice recognition** (cabin noise, microphone positioning...)
- Some **use cases** are car-specific (e.g. cabin controls, questions about the surroundings)

The multi-layered ecosystem pushes for cross-assistant conversation capabilities

- 76% of drivers are interested in having their in-home voice service in their next vehicle because
 - No learning curve for the user (66%)
 - No learning curve for the voice assistant (57%)
 - They want seamless experience (49%)
- Tesla registers the worst conversion rate (50%) from trial to monthly use of voice in car because it does not support Apple CarPlay and Android Auto

Sources:

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State of Voice by Adobe Digital - 2019

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