The Growth of In-Car Intelligent Assistants: Will voice experiences be the bridge to connected commerce?

JEFF FERMAN, HEAD OF AUTO SKILLS, ALEXA AUTOMOTIVE
Over half of US adults have used a voice assistant in the car

US Adults That Have Used a Voice Assistant in the Car

252 Million
U.S. Adult Population

129.7 Million
in-car

Source: Voicebot.ai In-Car Voice Assistant Consumer Adoption Report 2020
Voice assistants are projected to be embedded in nearly 90% of new vehicles sold globally by 2028.

-- Sam Abuelsamid, Principal Research Analyst, Navigant Research at Automotive World, Oct. 2019
TOP CUSTOMER COMPLAINT

Built-in voice recognition
Challenges with Traditional Voice Recognition Systems

“Limited in what it can do.”

“Needs more capabilities integrated into vehicle.”

“It does NOT understand what was asked/told gives incorrect information and options not even close to what it was asked/told.”

“Not intuitive, doesn't understand, hard to use.”

“...cannot understand a sentence string command and must slowly go through prompts to complete tasks (i.e. to dial a number not in phone system must say Phone, dial, number and confirm or deny number read back before dialing).”

“[I have to] learn the specific words to activate features.”

“Outdated, can only use to make phone calls, and navigation is unreliable and takes longer to input.”

“... the maps seem outdated.”
ON-THE-GO

“Alexa, time to go to work.”
Q: Would you want to have the same brand of in-home voice assistant device installed in your next vehicle?  

US N=5000 Germany N=780

Interest in Same Brand of In-Home Voice Service To Be On Next Vehicle

DESIRE FOR SAME SERVICE IN CAR

US
- Definitely Would: 78%
- Probably Would
- Don’t Know
- Probably Would Not: 12%
- Definitely Would Not

Germany
- Definitely Would: 80%
- Probably Would
- Don’t Know
- Probably Would Not: 15%
- Definitely Would Not
Going Beyond Car Features

Top Desires of In-Vehicle Voice Service

- **Navigation**
  - US: 88%
  - Germany: 81%

- **Musical entertainment**
  - US: 70%
  - Germany: 70%

- **Driver warnings**
  - US: 67%
  - Germany: 63%

- **Communications**
  - US: 48%
  - Germany: 67%

- **Vehicle controls**
  - US: 63%
  - Germany: 63%

- **Automotive services**
  - US: 51%
  - Germany: 70%

- **Personal needs**
  - US: 44%
  - Germany: 54%

- **Reading entertainment**
  - US: 32%
  - Germany: 54%

- **Vehicle education**
  - US: 18%
  - Germany: 25%

Q: Rank, in order of importance, what you would want your vehicle voice assistant to be capable of doing. US N=5000 Germany N=780

2020 J.D. Power/Alexa Automotive In-Vehicle Voice Connectivity Study

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Amazon Pay

A simple way for customers to pay for products and services using the information already stored in their Amazon account.
Connected Consumers

56% of customers who own a smart speaker said they are likely to use voice to purchase products in the next three years.¹

¹ Amazon Pay, How are connected consumers using voice?, 2020.
“Alexa, pay my electricity bill.”
EXAMPLES OF FEATURES/SKILLS SPECIFICALLY DESIGNED FOR AUTOMOTIVE

“Alexa, open Urgently.”

“Alexa, I have a flat tire.”

“Alexa, ask what3words to navigate to cloth grit dice.”

“Alexa, ask RingGo If I can park here.”

“Alexa, sag Pay By Phone dass ich 2 Stunden parken möchte.”

“Alexa, find parking.”

“Alexa, ask Parkbob, what parking rules apply here.”

“Alexa, ask ParkingRhino to show nearby parking location.”

“Alexa, pide a LetMePark aparcar por aquí.”

“Alexa, pay for gas.”

“Alexa, demande à MOOVILITY, où est la station la plus proche.”

“Alexa, where can I find gas nearby?”
“Alexa, pay for gas on pump 3”
Video

ALEXA PAY FOR GAS
Vehicle Integrations
ALEXA CUSTOM ASSISTANT
Video

ALEXA CUSTOM ASSISTANT
Thank you

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