



Conversational Commerce Research

Why Consumers Are Embracing Voice Assistants in Their Lives

L'IA au service de la relation clients

31 janvier 2019



Customer experience
as it was meant to be

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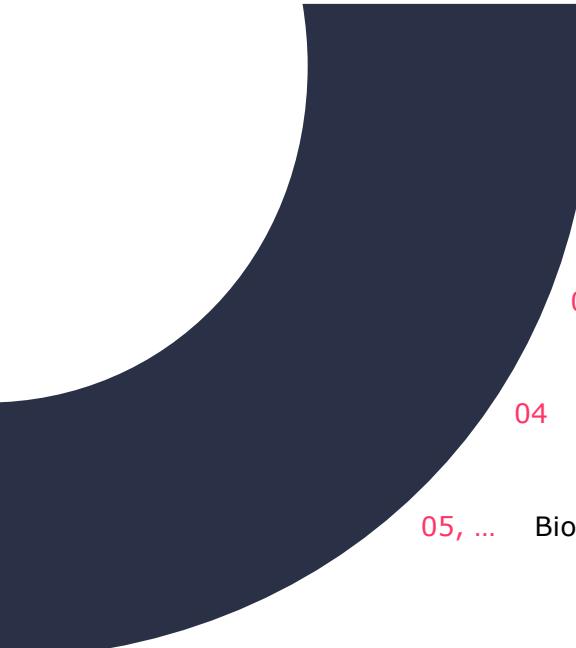
Enterprise cloud contact center

Customer experience as it was meant to be

Odigo helps big organizations connect with individuals. It's an omnichannel contact hub that cultivates the value in every conversation – building happy, productive relationships between your people and your customers.

L'IA au service de la relation client

Les usages de l'intelligence artificielle dans la relation clients et le commerce

- 
- 01 **Intelligence conversationnelle : assistants personnels, chatbot, voicebots, ...**
 - 02 Conseiller augmenté
 - 03 Routage intelligent
 - 04 Connaissance client : segmentation, profilage, recommandations, ...
 - 05, ... Biométrie vocale, détection d'intention, lutte contre la fraude, etc.

Le paradoxe de l'intelligence conversationnelle en 2019

De nombreuses annonces...

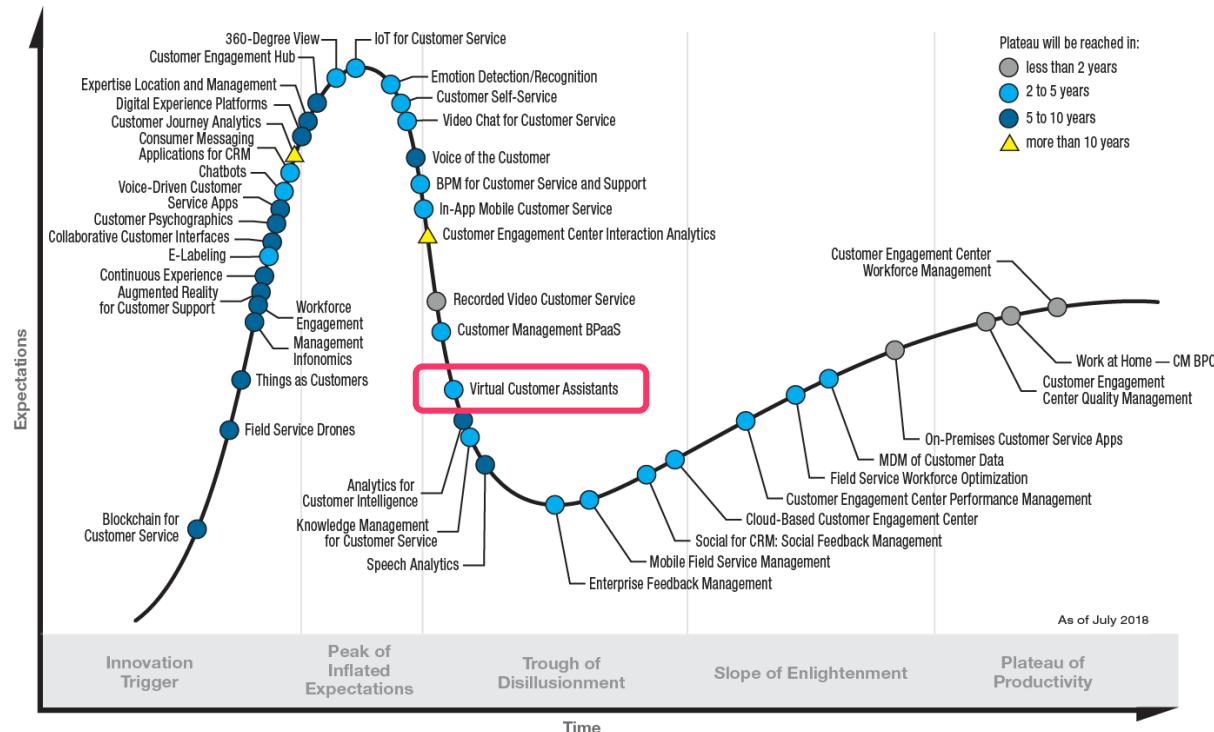


Amazon a déjà placé Alexa dans 100 millions d'objets connectés
lesechos.fr



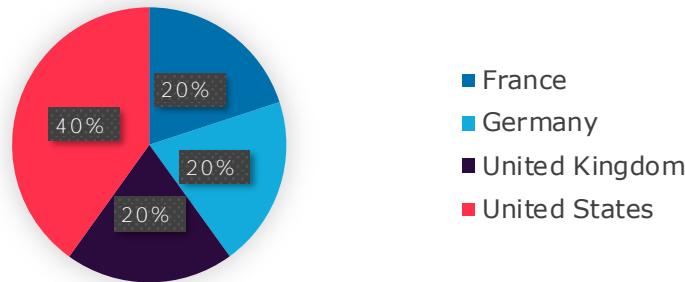
... Des interrogations sur la réalité opérationnelle et le potentiel business

Hype Cycle for CRM Customer Service and Customer Engagement, 2018



Un éclairage : l'étude “Conversational Commerce – Why Consumers Are Embracing Voice Assistants in Their Lives” réalisée par Capgemini en 2018

Country Distribution of Survey Respondents



Definitions

We define **users** of voice assistants as those respondents who have used voice assistants at least once in any form via:

- smartphones,
 - smart speakers,
 - screen-based and other devices enabled with voice assistants (not smartphones);
- Everyone else is termed a **non-user**.

Consumer Survey

We surveyed **5,041 consumers** (aged 18 or above) across four countries—France, Germany, the United Kingdom, and the United States.

Consumer Focus Groups

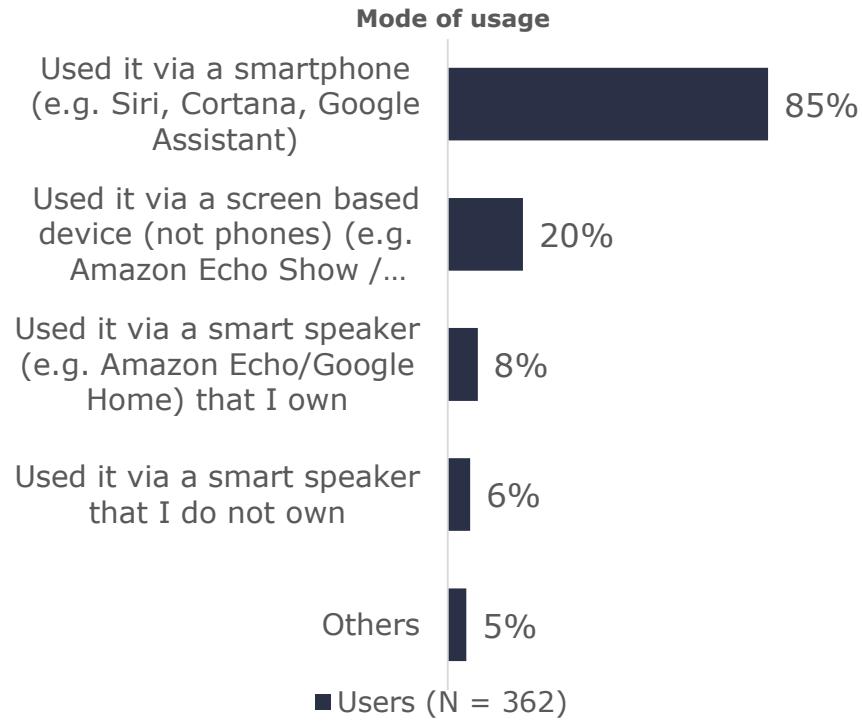
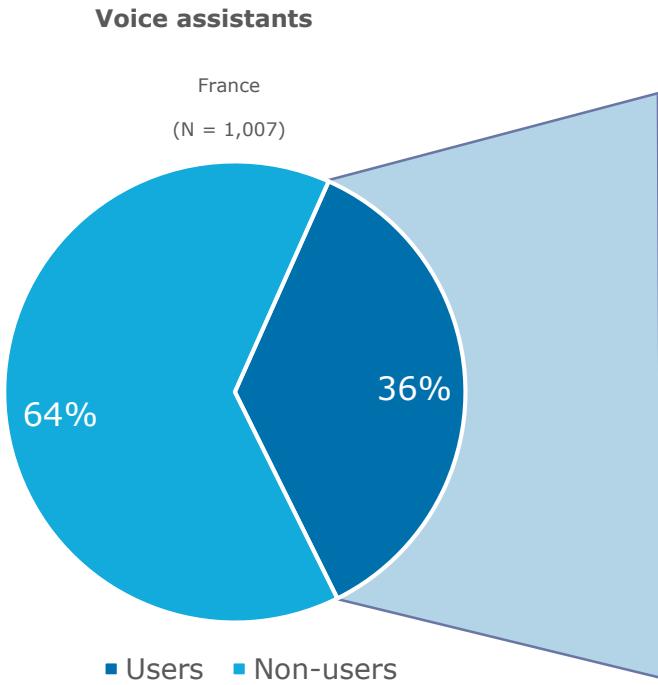
We conducted **four virtual focus groups** with consumers, one each for France, Germany, the United Kingdom, and the United States. Each focus group had eight to ten participants, and consisted of a mix of users and non-users.

Source: Capgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 5041 consumers in the US, UK, France and Germany.

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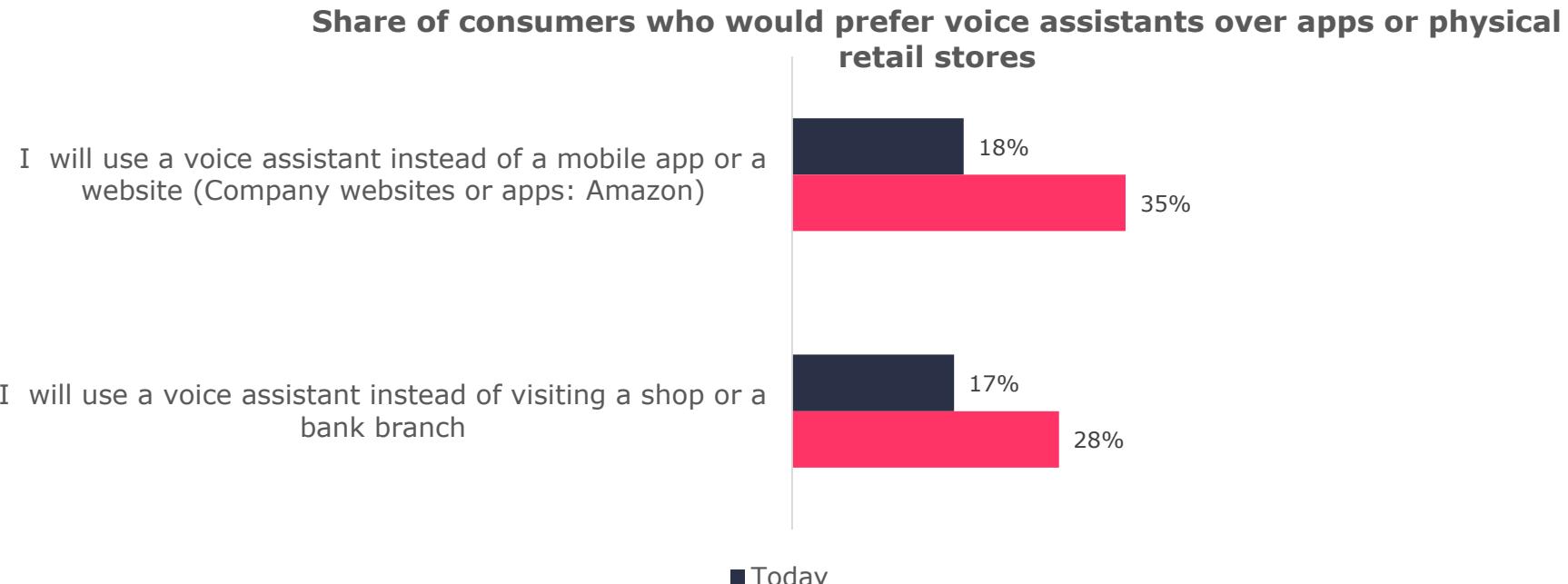
Une part importante des consommateurs utilise déjà des assistants vocaux



Source: Capgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 1,007 consumers in France.

Les assistants vocaux sont appelés à devenir un mode d'interaction client important dans les trois années à venir

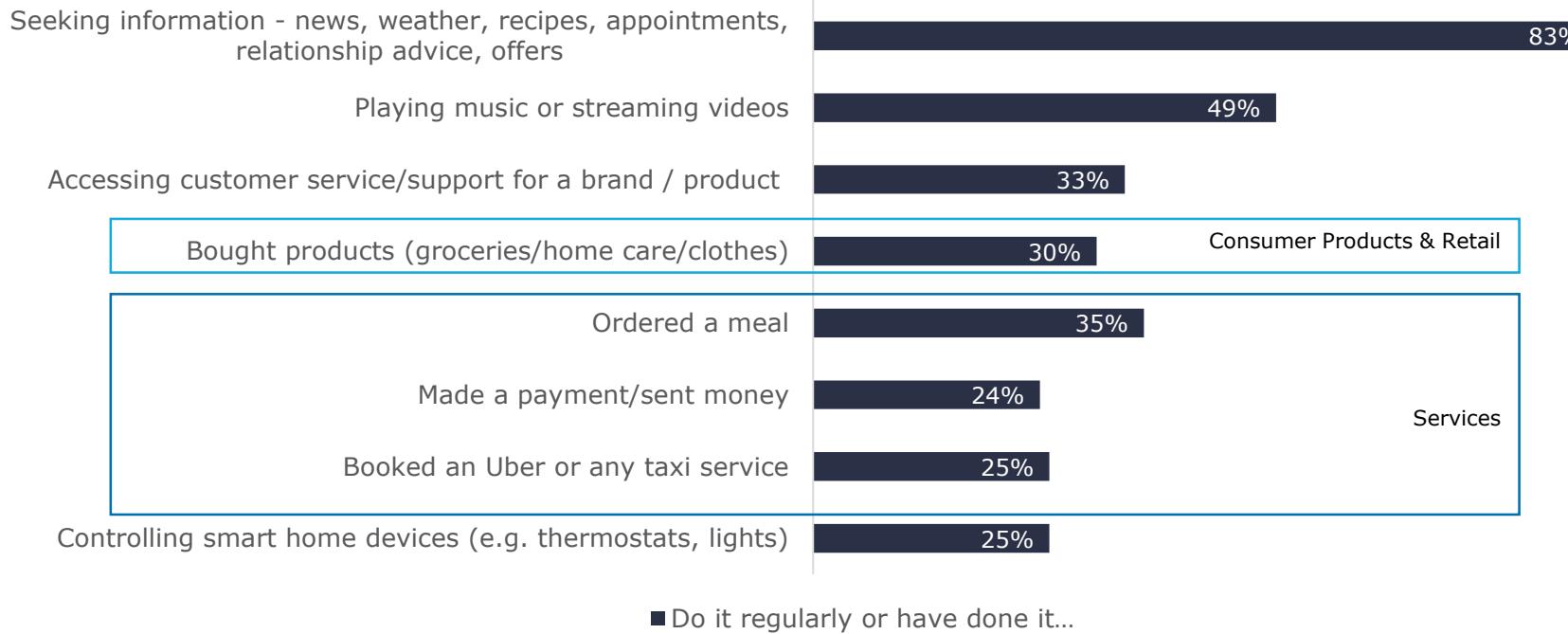
Consumers are developing a strong preference for interacting with companies via voice assistants



Source: Capgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 1,007 consumers in France.

Les consommateurs ont déjà adopté les assistants vocaux pour un large spectre d'usages

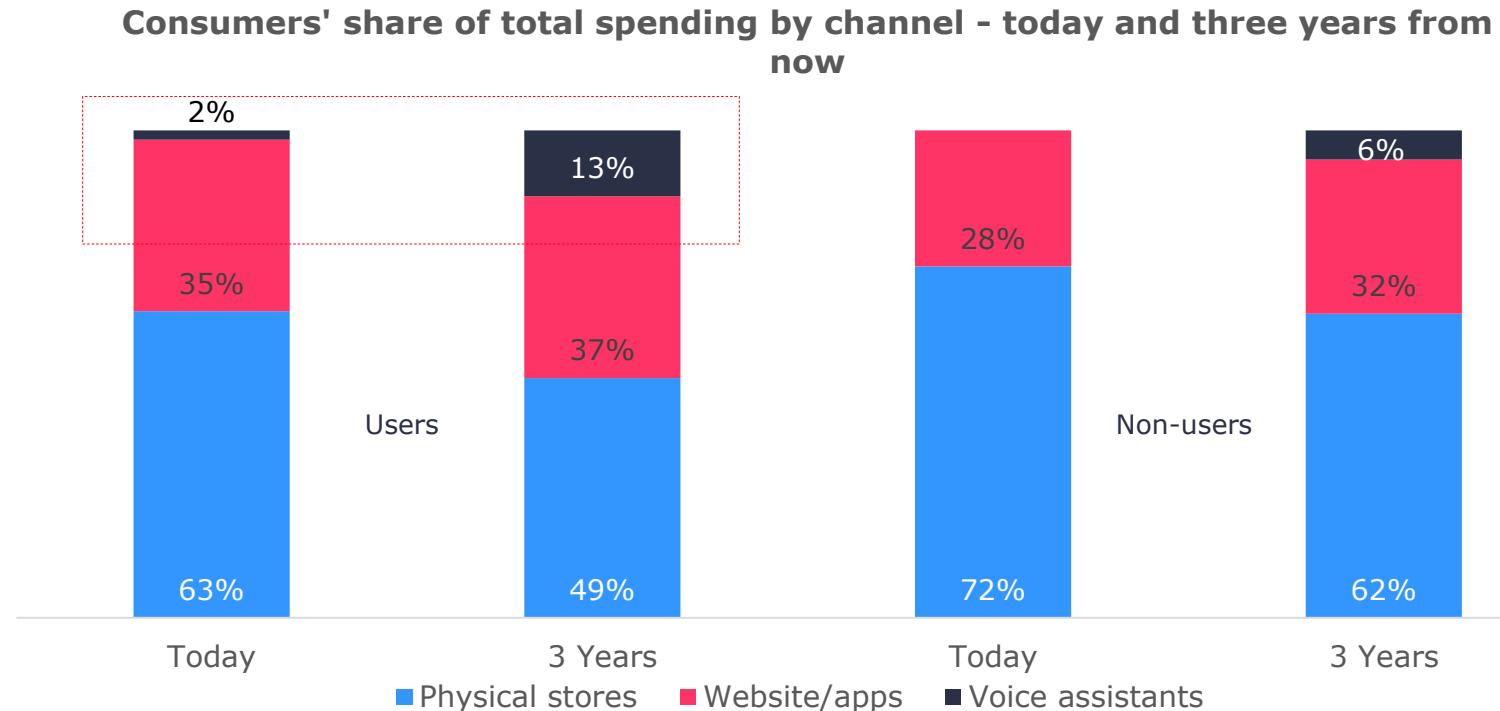
Level of usage



For the purpose of this paper, we define products as all things that are covered in consumer products and retail; and we define services as ordering a meal, banking related transactions, and booking a taxi service.

Source: Capgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 362 users in France.

Pour leurs utilisateurs, les dépenses via les assistants vocaux devraient être multipliées par six dans les 3 ans à venir

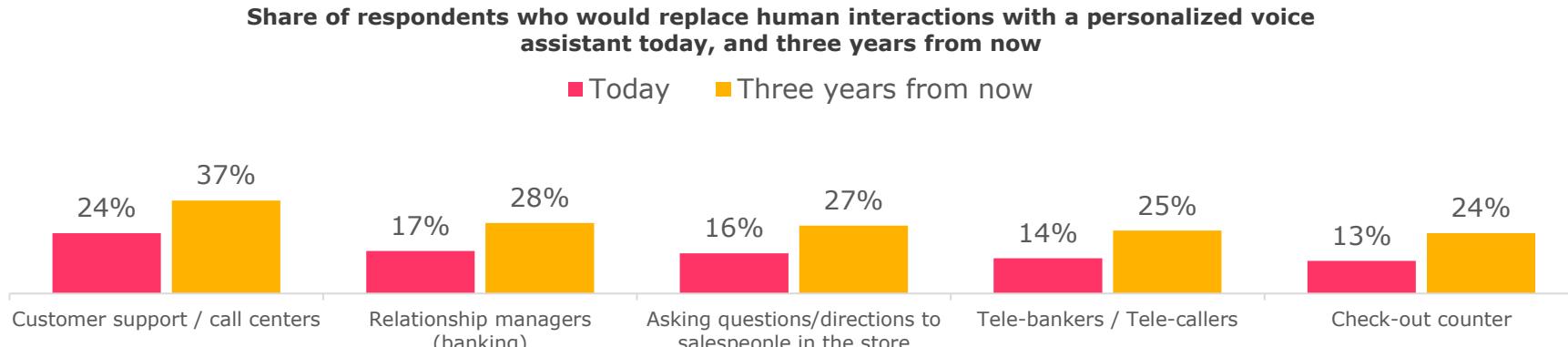


Source: Capgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 1,007 consumers in France.

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Le commerce conversationnel représente une alternative à l'interaction humaine



Source: Capgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 1,007 consumers in France.

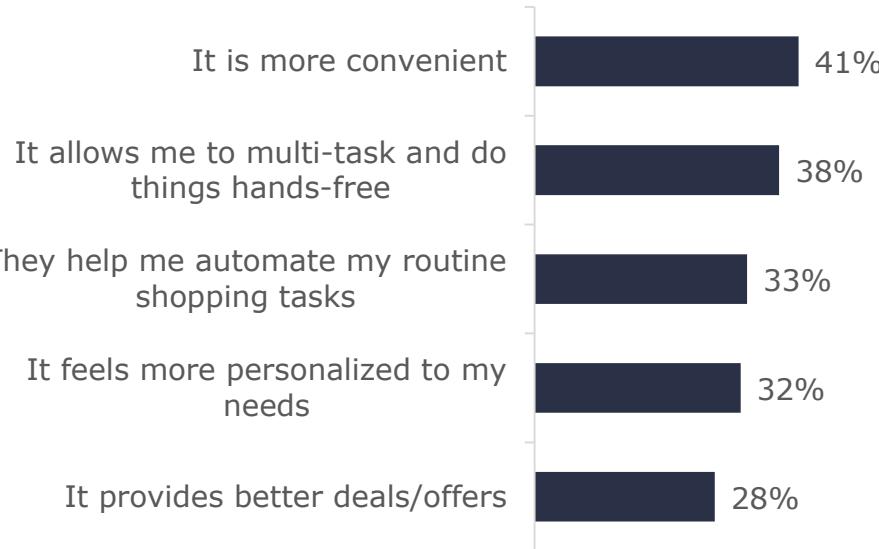
Consumer Focus Group

"I think if I had a choice, I would use a voice assistant. It would be faster and less stressful. I have had some really hard time sometimes with customer support. I think the voice assistants could take away a lot of stress and headache." - US focus group participant

"If I need to locate something in the shop, I would rather have a voice assistant help me find it than find a salesperson." - UK focus group participant

La praticité et le multi-tâche sont les premiers intérêts des assistants vocaux

I would prefer a Voice Assistant over a website or an app because (top five reasons)



Source: Capgemini Digital Transformation Institute, Conversational Commerce Survey, October-November 2017, N = 1,007 consumers in France.

Consumer Focus Group

- *"The biggest thing for me about voice assistants is to be able to do what I want to do hands-off, like if I am cooking. In such situations I don't want to touch the phone or the tablet and would just like to use the voice assistant for convenience."* - US focus group participant
- *"With two kids and a life that's going so fast, I think it would save a lot of time to automate daily chores. For example, during driving, checking maps or finding a parking space would be much more practical."* - French focus group participant

La rapidité est le premier motif cité pour préférer les assistants vocaux aux interactions humaines

**Reason I prefer voice assistant over human interactions in shops/call centers
(top five reasons)**

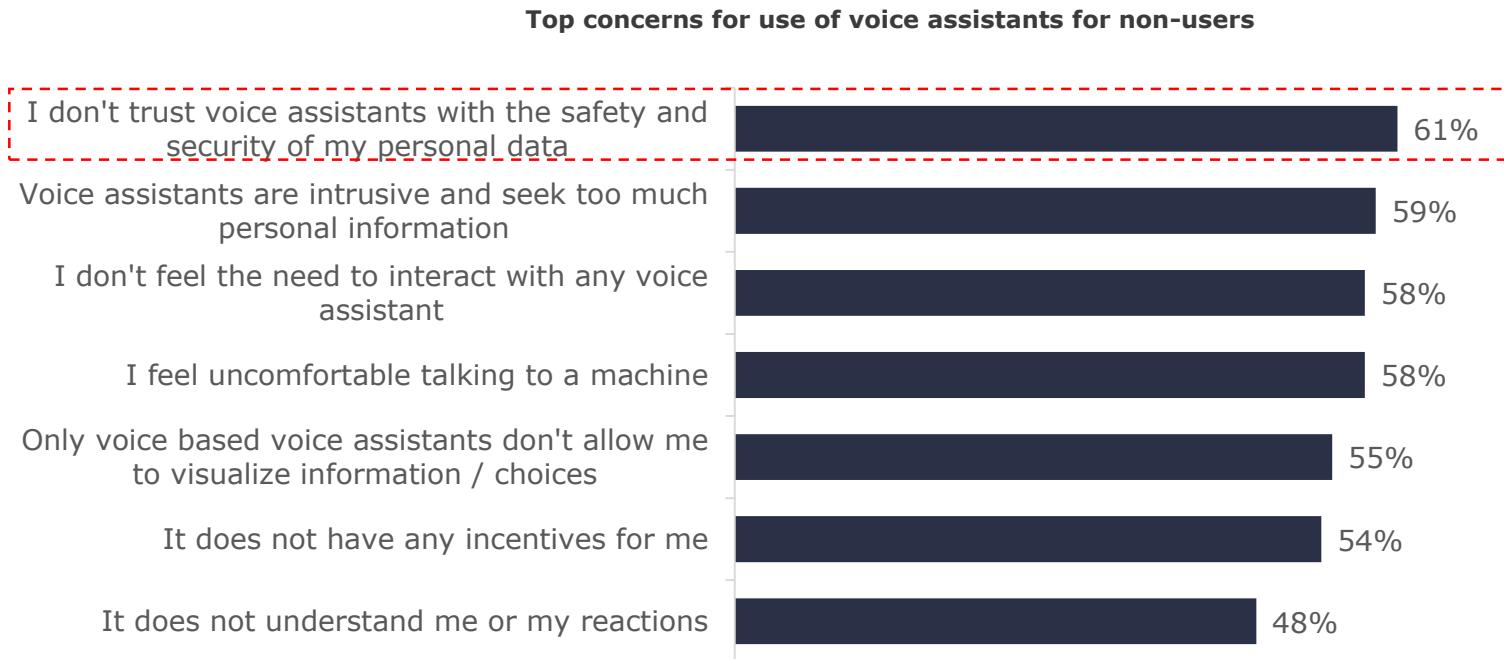


Source: Capgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 1,007 consumers in France.

Consumer Focus Group

- *"I would rather interact with the voice assistant, especially while making purchase orders. It would just make it more accurate, because with humans, they could write it down wrong or get the quantity incorrect or other factors."* - US focus group participant
- *"When I am ordering my usual coffee at Starbucks, I would rather go with a voice assistant. It saves time and effort on my part. But if I am going to the bank, I would like a person to help me, because there could be greater complexity."* - UK focus group participant

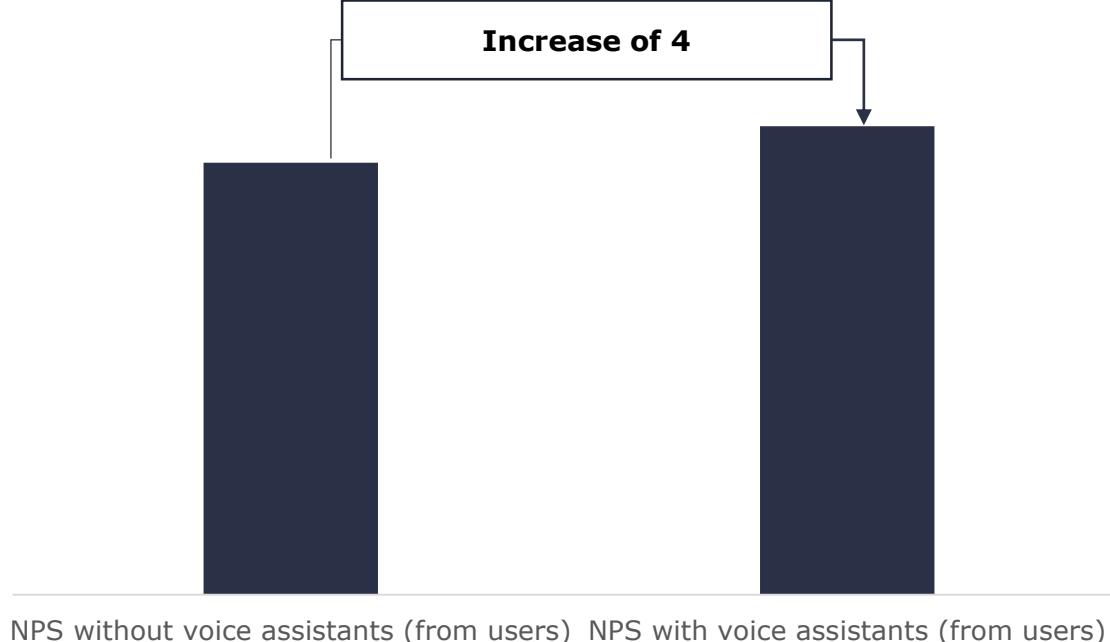
Les non-utilisateurs expriment des inquiétudes sur l'usage des assistants vocaux



Source: Capgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 645 non-users in France.

Fournir un assistant vocal est susceptible d'augmenter le NPS d'une marque de 4 points

Change in NPS for brands that provide a voice assistant over brands that do not



Source: Capgemini Digital Transformation Institute, Conversational Commerce Survey, October–November 2017, N = 362 users in France.

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Quels enseignements pour la suite de nos débats aujourd'hui ?

- Un intérêt des consommateurs
- Des usages réels
- Des freins à prendre en compte
- Une perspective d'évolution dans la durée



About Odigo

Odigo helps big organizations connect with individuals through world-class, cloud-based contact center solutions. Our cutting-edge, proprietary technologies enable a seamless, efficient, omnichannel experience for your customers and a satisfying, engaging experience for your service agents.

Odigo serves more than 400,000 agents and business users globally. With a 25-year history of industry firsts, Odigo has more than 350 clients around the world.

Odigo is a Capgemini brand, which means we benefit from the scale and expertise of one of the world's foremost providers of consulting, technology services and digital transformation.

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