

Global and China Automotive Voice Industry Report, 2019

Sep. 2019

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

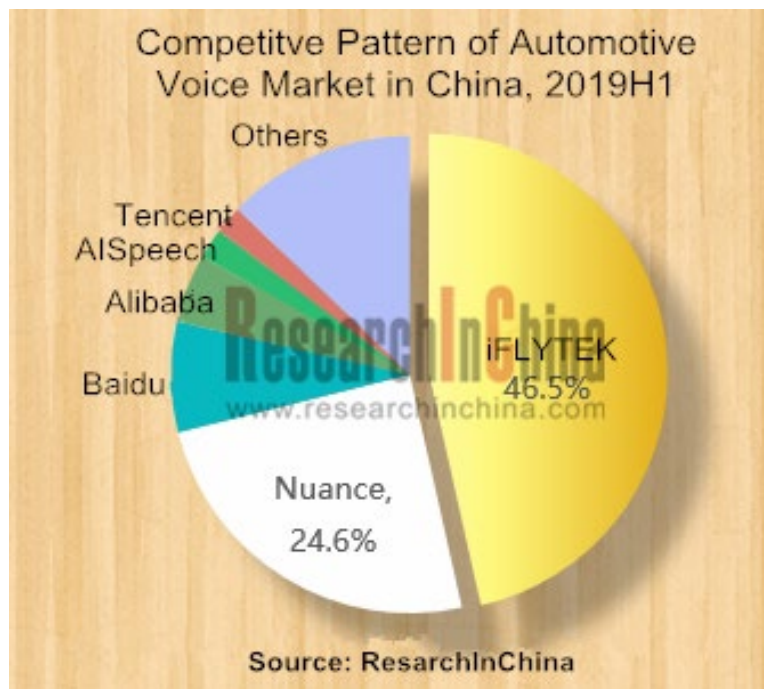
Automotive Voice Market: Installation in New Passenger Cars in China Hit 28.7%

As software and hardware technologies advance, voice has been a key way for people to communicate with machines, particularly in automotive field where big auto brands are racing to launch the capability.

In 2019H1, 28.7% of new passenger cars on offer in China carried voice capability, with installation soaring by 57.8% from the same period of last year; brands that largely equipped their vehicles with the function included Geely, Nissan, Buick and Changan.

In 2018, China's automotive voice market size ballooned by 73.5% year on year. Market competition is characterized by the following:

- iFLYTEK as a bellwether in the market, swept 46.5% shares, and developed joint-venture brand customers beyond homegrown automakers.
- Cerance (Nuance) is a voice provider for joint-venture brands, with a market share of 24.6% in the first half of 2019. Its voice convergence solutions have been an option for several companies.
- Vehicle models packing voice technology of Baidu, Alibaba and Tencent (BAT), have begun to be spawned since 2018.
- Among BAT, Baidu is the most aggressive; Alibaba slows down in installation; Tencent will step forward by developing voice-enabled WeChat vehicle version and applets.



As the biggest speech provider in China, iFLYTEK has established a foothold in automotive field for 16 years, with rich experience in the area. By the end of 2018, iFLYTEK had forged close partnerships with a number of OEMs, with total installations of OEM automotive voice outnumbering 15 million.

iFLYTEK is working on IVI system by virtue of superiority in speech technologies. Its Feiyu IVI system has iterated to version 2.0 adding capabilities like voiceprint and face recognition beyond multi-dimensional voice interaction functions from integrated voice recognition, natural language understanding and speech synthesis to voice wake-up, voice enhancement, intelligent search and full duplex voice. Moreover, Feiyu 2.0 provides custom-made services, for example, IVI interface can display OEM's unique label. The system has already been mounted on Changan CS95, Haval H7, Chery Arrizo GX/EX and Dongdeng Xiaokang 580.

Nuance as the world's largest voice provider is about to complete spin-off of its automotive business in October 2019. The separate company named as Cerence, has 70 speech models (e.g., mandarin, Cantonese and Shanghainese), 1,250 patents, and a workforce of 1,300 including 240 staffs in China.

Cerence sees a rising share in the Chinese market as it broke the barriers on localization. ECARX GKUI 19 begins to use Cerence voice enhancement technology; Cerence local voice solution also becomes available to Banma Zhixing 3.0.

Tencent lags behind Baidu and Alibaba a bit in automotive voice. In August 2019, the launch of WeChat vehicle version invigorated new vitality into Tencent. WeChat vehicle version features voice-enabled message receiving and sending and a deep integration with navigation. The availability of smartphone Bluetooth perception allows automatic login when users get in car and automatic logout when they get off. Changan CS75 Plus is currently the first model carrying vehicular WeChat. For what to do next, Tencent Auto Intelligence will roll out an applet framework designed for voice and vehicle HMI, which enables voice wake-up driven by scenario engine, with lighter cloud load.

Global and China Automotive Voice Industry Report, 2019 highlights the following:

- Intelligent speech industry and market (industry chain, application scenarios, development history, market size, competitive pattern, etc.);
- Global and China automotive voice markets (size, competitive pattern, development trends, major players' layout, their development characteristics, etc.);
- Chinese automotive voice suppliers (profile, operation, product system, R&D system, major clients, development plan, etc.).

1. Overview of Intelligent Voice Industry

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