

# **Global and China Automotive Voice Industry Report, 2020**

**November 2020**

## 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: the Installation Rate Jumps to 64.8%; Baidu and VW-Mobvoi are gathering pace**

As artificial intelligence technology advances, voice has been a crucial way for people to communicate with machines, particularly in automotive field where voice interaction has improved driving safety and convenience significantly.

In 2019, 48.8% of passenger cars in China carried voice capability. From January to September 2020, the installation rate rose to 64.8%.

By brand, Volkswagen currently stays ahead in installations and keeps growing. From January to September 2020, Volkswagen installed voice capability in 1.08 million cars, an annualized upsurge of 42.2%. As for price range, the penetration rate of voice capability in cars priced between RMB300,000-500,000 is relatively higher, staying above 90% in the first nine months of 2020.

At present, iFLYTEK as a bellwether in Chinese automotive voice market boasts a market share of more than 40%. Its voice solutions are basically seen on Chinese brand vehicle models. As of October 2020, iFLYTEK's open platform has attracted at least 1.6 million developers who developed a total of over 930,000 applications for 3.02 billion end users or more.

Cerence is a voice technology provider for joint-venture brands, ranking second with a market share of 30%. In Greater China, it is mainly engaged in smart mobility and IoT technology. Cerence has so far developed more than 100 voice projects in China and served over 50 automotive and IoT customers.

Baidu, Alibaba and Tencent (BAT) have embarked on automotive voice. Among them, Baidu is at a faster gallop and with a market share of over 5%. Baidu Telematics has forged partnerships with more than 60 well-known auto brands worldwide, covering over 400 cooperative models. The production models equipped with Baidu's intelligent connectivity capability ran a total of 1 billion kilometers in 2019.

Moreover, VW-Mobvoi which has a background in OEM has dabbled in automotive voice as well. VW-Mobvoi has supported SOL, Passat, Magotan, Audi A4L and other models, and announced that it will cover all models of FAW-Volkswagen by the end of 2020.

Incentivized by the policies concerned, market demand, technical features and enterprises' promotion, the automotive voice market will be ever expanding.

The automotive voice technology will head in directions as follows:

1. Voice interaction will evolve from passive mode to active one;
2. Personalized voice services will enjoy new opportunities;
3. Voiceprint recognition will be a boon for the personalized services of automotive voice;
4. Voice-driven entertainment will become common, setting the stage for voice control over car bodies and life services being the next hotspot;
5. Car-home interconnection will still be a trend;
6. Multimodal interaction will hold a trend;
7. Convergence solutions will become trending;
8. Automotive voice will be essential to digitalize cars;
9. Heuristic active telematics voice services will be a trend.

Global and China Automotive Voice Industry Report, 2020 highlights:

- ◆ Intelligent voice industry and market (industry chain, applied 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.);
- ◆ Development trends of automotive voice (market and technology).

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- 1.2 Voice Becomes the Mainstream Way of Human-Machine Interaction
- 1.3 Voice Interaction Tends to Center on Cloud
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