



## **From lost time to prime time: Cars as an experience platform**

**Cars no longer just get us from point A to B. Today, they act as a charger or hot spot, an office, a place to relax, or even an entertainment venue. With cars now valued not just for convenience but also their safety (over public modes of mobility), the time is right to upscale ambitions for what the future in-car experience can and should be.**

### **What's going on**

Not so long ago, the car was simply how we got from one place (and experience) to another. The time spent riding in them was effectively wasted. However, this has been totally upturned by technology, especially connectivity.

Today's vehicles are becoming an extension of our homes. Increasingly, cars are seen as another valued member of our digital device family—much like an Alexa or iRobot vacuum cleaner—they're a way for us to connect with our lives at home even while we're away.

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Cars as an experience platform**

BMW has been leading the way for years with BMW ConnectedDrive.<sup>1</sup> This digital, connected “drive-o-tainment” and services suite allows the user to control in-car comfort, entertainment and security, and also manage multiple facets of their daily life—from configuring at-home devices to booking services—all while on the road.

Subsequently, BMW brought on board key strategic partners to expand ConnectedDrive’s connected services and experience ecosystem. Particularly notable is its integration into Tmall Genie, the first smart voice assistant developed by China’s Alibaba AI Labs.<sup>2</sup>

General Motors’ GM Marketplace, the industry’s first in-car commerce platform, is the next step in brand experiences for customers. It connects users with the brands they love, providing offers and discounts, loyalty programs, restaurant reservations, parking spot bookings and a curb-side concierge for retail pickup and orders to go.<sup>3</sup>

Meanwhile, in the U.S., Fiat Chrysler Automotive has introduced Uconnect Market, a commerce platform that facilitates services like ordering food conveniently, finding the nearest gas station, or making dinner reservations using the vehicle

touchscreen. The car’s dashboard goes way beyond providing car information—rather, it’s a concierge that helps drivers navigate everyday life.<sup>4</sup>

Much like our phones, car dashboards now go far beyond their initial use. And when connected with mobile devices that help us control our lives at home—such as Alexa or Nest—the ability to incorporate a home’s functionality into a car’s functionality promises a whole new world to explore from behind the wheel.

Benefits to the user range from optimizing errands with shopping and pick-up functionalities to feeling confident in conducting meetings on the go, knowing you can check on home from miles away. And people’s appetites for this in-car functionality are growing.

In the long term, cars will offer the biggest opportunity for 5G Internet of Things and, by 2023, the automotive industry will become the largest market for 5G IoT solutions, Gartner predicts.<sup>5</sup>

**What’s next**

While varying degrees of connected vehicles currently cruise the roads, forecasts suggest an installed base of 700 million units of connected vehicles by 2030, with all new cars being connected from 2020 and beyond.<sup>6</sup>

Historically, connectivity and integrated flexible software platforms limited adoption.

With the advent of 5G, Android-based car platforms and Apple Play integration, for example, automotive industry original equipment manufacturers (OEMs) will develop new ways vehicles can increase productivity and build value over and above their transportation capability.

All of this creates the ideal environment for the automotive industry to reimagine the in-car experience and upscale ambitions for what its future can and should be.



## Opportunities for reimagination

# 1. Car as extended living space

Before the pandemic, consumers were spending more time at home.<sup>7</sup> Then, as we were forced to engage with more of the external world from inside our personal spaces, this shift was further accelerated in 2020 by COVID-19.

Today, the home is the place where most of our experiences in work, health and play reside—not just for now, but for the foreseeable future. Some 43% of people who had never worked from home pre-COVID now say their preferred working pattern post-pandemic would involve working from home at least once a week, our own research shows.<sup>8</sup>

Among employers, there are now indications that many businesses may never go back to traditional ways of working. Unilever<sup>9</sup> and Nationwide<sup>10</sup> are among those to have recently confirmed plans to change post-pandemic working patterns.

Our spending more time at home has given our cars the chance to shine as an additional

space. In fact, just as the home's role in an array of our daily activities has grown, so too will we see the car's role extended. One-fifth of British motorists used their cars as a spare room over the first half of 2020, according to a Skoda study.<sup>11</sup> Alternative uses ranged from catching up on work to watching TV, taking a nap or creating a play space for kids.

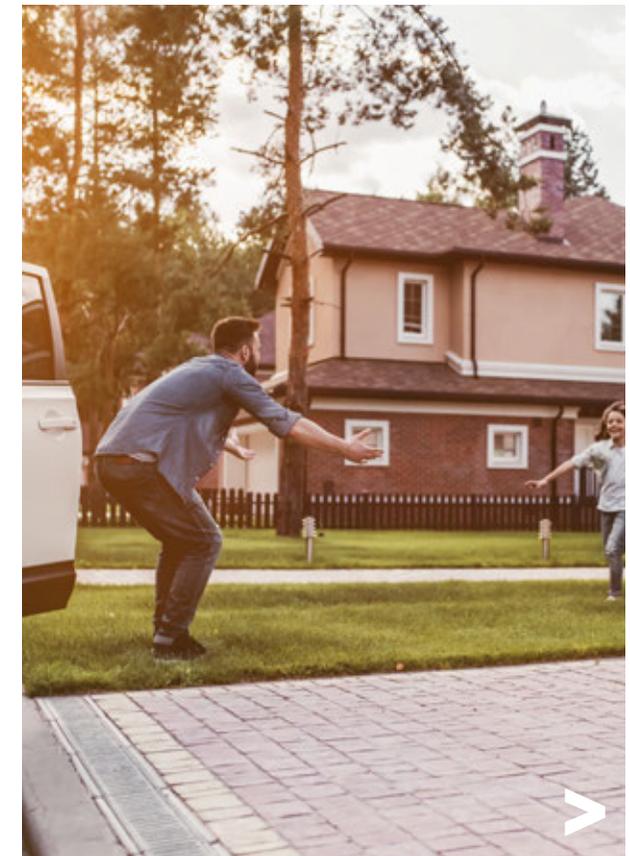
Airo, a concept car from London-based Heatherwick Studio for a Chinese-built green car, includes flexible interior features easily reconfigured to suit different needs. These include a dining table and swivel chairs and reclining seats that can convert to a double bed.<sup>12</sup>

Voice-activated services—increasingly used in a growing number of homes via smart speakers like Echo and Alexa—and the potential to integrate them more deeply across home and car are important parts of this opportunity.

Mercedes-Benz's bespoke in-car voice technology system, Mercedes-Benz User Experience (MBUX), is one of the most intelligent voice assistants on the road.<sup>13</sup> MBUX is a concierge in the dashboard that caters to a wide range of driver and passenger needs. By leveraging a variety of biometric technologies, it also provides a new level of personalization and security that are quickly accessed using voice.

Opportunities will also arise from OEMs partnering with third parties that are already doing voice-activated services well in other sectors. The key will be not building bespoke, siloed gardens that might limit future options while broadening the array of aspects of daily life their customers can control from inside their car.

The question for OEMs, then, is: What new products, services and experiences can they create around the car's new role as extended living space?





## 2. It's game time

Many have talked of the potential for a new world of in-car entertainment once autonomous cars become an everyday reality and drivers become passengers with extra time on their hands.

But why wait? The in-car entertainment experience is already ripe for reimaging. There's plenty of scope to create more immersive experiences for passengers, which is what Holoride is now doing.

Holoride's mission is to turn vehicles into moving theme parks.<sup>14</sup> By combining real-time vehicle data with XR, it offers a dynamic backseat experience that matches every movement of the car to turn each ride into a thrill. By harnessing the data and idleness at hand to create experiences ranging from gaming to educational tours, it's transforming dead time into time well spent.

## 3. Safe and sound

For years, in-car safety has been about airbags, crumple zones and driver assistance systems. Then customers' health and safety concerns changed as a result of the pandemic.

Today, physical safety features remain just as important. But we're now more likely to see our cars as safety bubbles that can protect us from an invisible virus more effectively than shared public transportation, for example.

Chinese automaker Geely Auto, whose parent company owns high-end brands Volvo Cars and Lotus, announced in February 2020 that in response to the coronavirus, its forthcoming Icon electric SUV would feature an N95-certified air purification system that could "isolate and eliminate harmful elements in the cabin air," including viruses.<sup>15</sup>

But what about beyond the pandemic? How could OEMs evolve health and safety within the car further and make it more enjoyable? Smarter cars mean smoother rides and the promise of relief from motion sickness. In fact, advanced driver assistance vehicles showed a 27% reduction in bodily injury claim frequency and a 19% reduction in property damage frequency, according to a report from LexisNexis Risk Solutions.<sup>16</sup>



## What automotive leaders can do next

### 1. Empower autonomy

Autonomous vehicles will create many opportunities to connect to adjacent areas like wellness, entertainment, and beyond. To prepare, OEMs need to actively experiment in these spaces and start understanding consumer needs in a much wider context than just getting from point A to B. And they need to partner up across industries to make it happen—following the example set by the likes of Waymo or Cruise for their development of self-driving cars.<sup>17</sup> Toyota's e-Palette self-driving vehicle was developed with partners like Amazon and Uber.<sup>18</sup>

In the future, mobility needs to reach beyond automotive partnerships: Think big. Imagine restaurants sending a car to pick you up for a truly door-to-door experience, dealers sending cars to your door for a test drive and many more multilayered experiences.

### 2. Remember: 1 + 1 > 2

From fleets to app development and beyond, the key to future industry success lies in OEMs' ability to form partnerships that supersede their past collaboration efforts. In a complex system of emerging tech, it's only logical that companies look to third-party collaborators. While the past was about secrecy, the trend toward multiparty systems provides a shared data infrastructure to enhance trust, transparency and collaboration—even among competitors.<sup>19</sup>

The benefits of sharing data extend beyond outcomes and efficiencies. Sharing data also contributes to a more connected society and, in the case of advanced driver-assistance systems (ADAS), safer and more satisfied consumers.

### 3. Think big, act bigger

It's time to think bigger than the sale of a single car as a main objective.

Nearly half of all drivers in a multicountry survey of 7,000 consumers said they would consider giving up vehicle ownership in favor of autonomous mobility.<sup>20</sup>

OEMs need to fully commit to embracing alternatives to the ownership model. The power of thinking big and acting bigger



is neatly demonstrated by Turo, which is capitalizing on rental car companies slashing their fleets during the pandemic with its app that enables private car owners to rent out their private vehicles.<sup>21</sup>

To keep customers in the future of autonomous mobility, experimenting and dabbling in ideas now isn't enough. OEMs need to start positioning mobility services as a valid alternative to car ownership.



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