



FUSE
F O R E S I G H T

Creating New Autonomous In-Vehicle Experiences

Anticipating emerging needs and unexpected demands

RICH RADKA | 16 OCT 2019 | DUBAI WORLD CONGRESS FOR SELF-DRIVING TRANSPORT



MOBILITY ENDGAME

Existing transport value chains are collapsing.
People begin to view mobility as a utility.

Understanding tomorrow's customer today lets you
identify in-vehicle experiences that differentiate you.

To find competitive advantage
in new mobility, companies
must provide experiences that
make it easy for people to do
what they want.

EXPERIENCES MATTER

\$62bn

are lost every year
due to poor experiences.

Forbes

80%

of companies believe they
deliver good experiences, but
only 8% of their customers agree.

HBR Research

32%

higher revenues for
design-driven companies.

McKinsey

What in-vehicle experiences mean for you



Identify new
opportunity spaces



Anticipate
credible futures



Shape people-centric
teams and cultures



MOBILITY options are changing fast.
However, what people strive for in their lives remains constant.

Trust
Control
Convenience

CHANGING EXTERNAL FACTORS

ELECTRIC VEHICLES (EVS)



AUTONOMOUS VEHICLES



SHARED MOBILITY



UNCHANGING INTERNAL MOTIVATIONS

ELECTRIC VEHICLES (EVs)



AUTONOMOUS VEHICLES



SHARED MOBILITY



INSTINCTUAL



EMOTIONAL



RATIONAL



An aerial, high-angle photograph of a busy city street. The street is filled with many pedestrians walking in various directions. The image is in black and white, with a dark blue semi-transparent rectangular box overlaid in the center. The box contains white text. The overall scene conveys a sense of a crowded, active urban environment.

How will unchanging human motivations lead to completely new kinds of in-vehicle experiences?

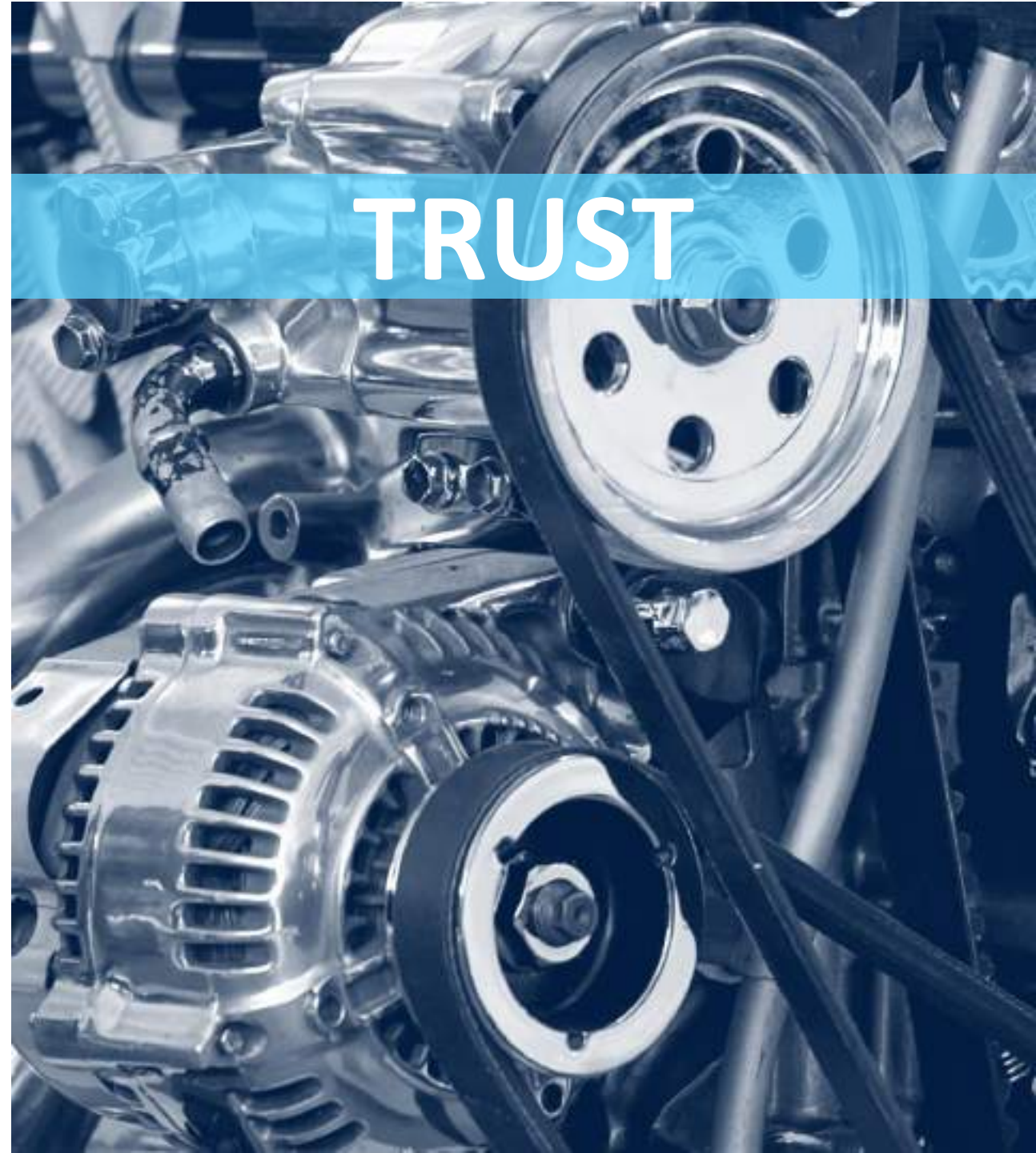
UNCHANGING HUMAN MOTIVATIONS

Capability

Intent

Know me

Security



UNCHANGING HUMAN MOTIVATIONS

Not your father's transport

Black box experiences

Individuality

Mastery



UNCHANGING HUMAN MOTIVATIONS

Amazon Effect

Expectations

Shifting mobility behaviours

Cityscapes

CONVENIENCE





How can we identify the right new in-vehicle experiences to deliver?

KEY EXPERIENCE FACTORS TO FOCUS ON

Digital expectations

Driver → Passenger

Unintended complexity

Making commodity vehicles “mine”

No longer a place of escape

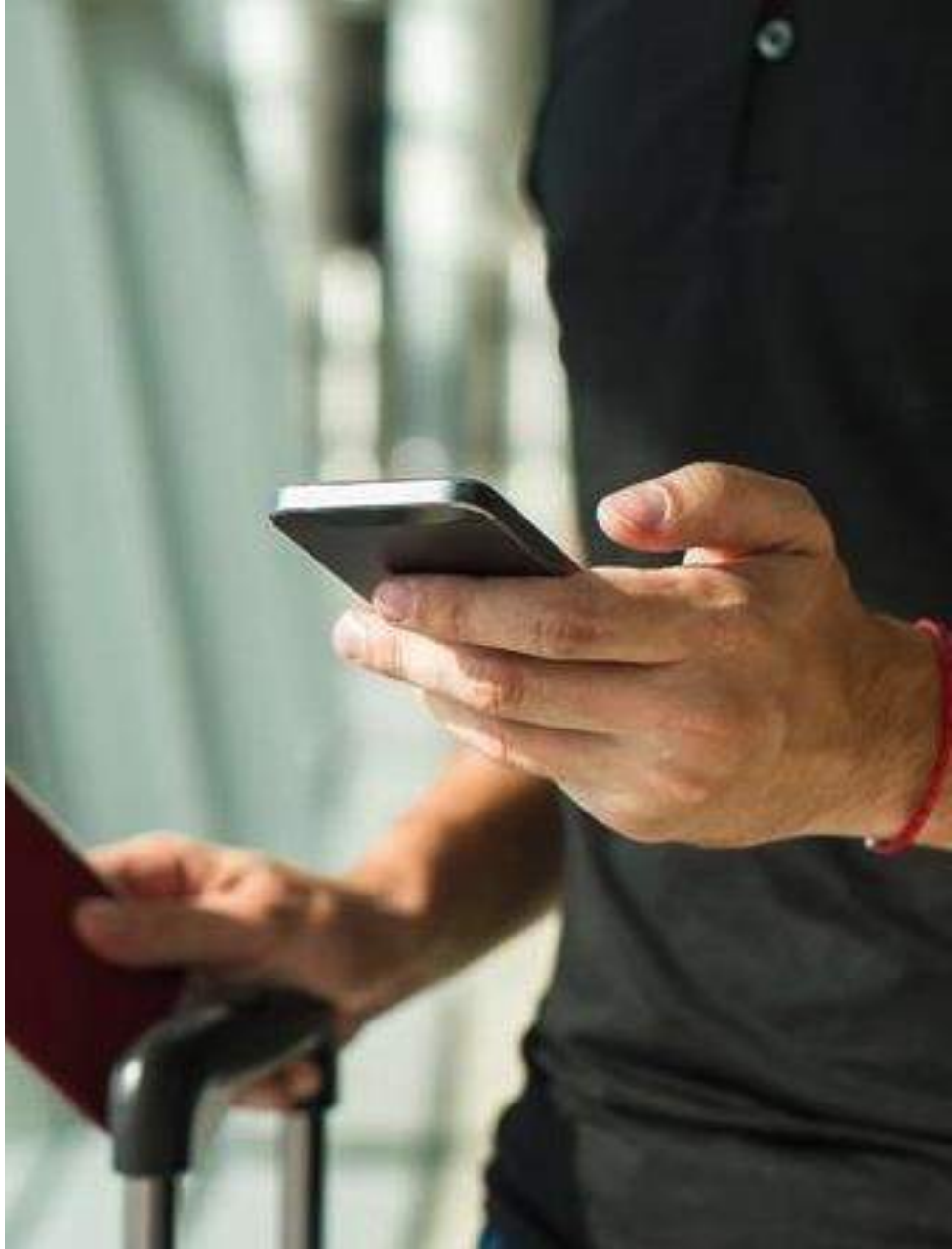
Holistic design vs. collections of features

Digital expectations

People smoothly navigate their lives through mobile devices.

Smartphones have irreversibly shaped our habits and expectations towards simplicity and ease-of-use of all embedded technologies.

**User-friendly software is critical inside the car.
Better to create new habits or to support existing ones?**





Driver → Passenger

In our shift towards connected and automated cars, drivers will gradually become their own passengers.

With resulting spare time and attention, drivers will be able to (and *need to*) define their new in-car roles and identities.

**What new and valuable features will emerging roles demand?
How to deliver interfaces that scale to various identities?**

Unintended complexity

We have engineered computer-assisted decision-making into every drive.

V2V and V2I interactions, increased vehicle functionality and autonomy, and the rise of smart cities make in-vehicle contexts more complex than ever.

What information is meaningful and relevant in any given context?

How to prioritise and provide in non-intrusive ways to enable riders to act and benefit appropriately?



Making fleet vehicles “mine”

The rent vs. buy dichotomy has been replaced by dozens of car-access choices.

A variety of shared vehicles, ride hailing services, and last mile devices will expose drivers to many different types of vehicles in different contexts from one day, or one trip, to the next.

How can we identify features and design elements that adapt to lifestyles and preferences of multiple user types seamlessly and more deeply than today?





No longer a place of escape

Due to ubiquitous connectivity, cars are losing their status as the “last refuge”.

People need their time off the grid and sometimes need “plausible unreachability” in a world of relentless connectivity.

What will consumers demand from experiences to meet needs for tranquility, privacy, relief and escape; modes that need to balance connection with freedom?



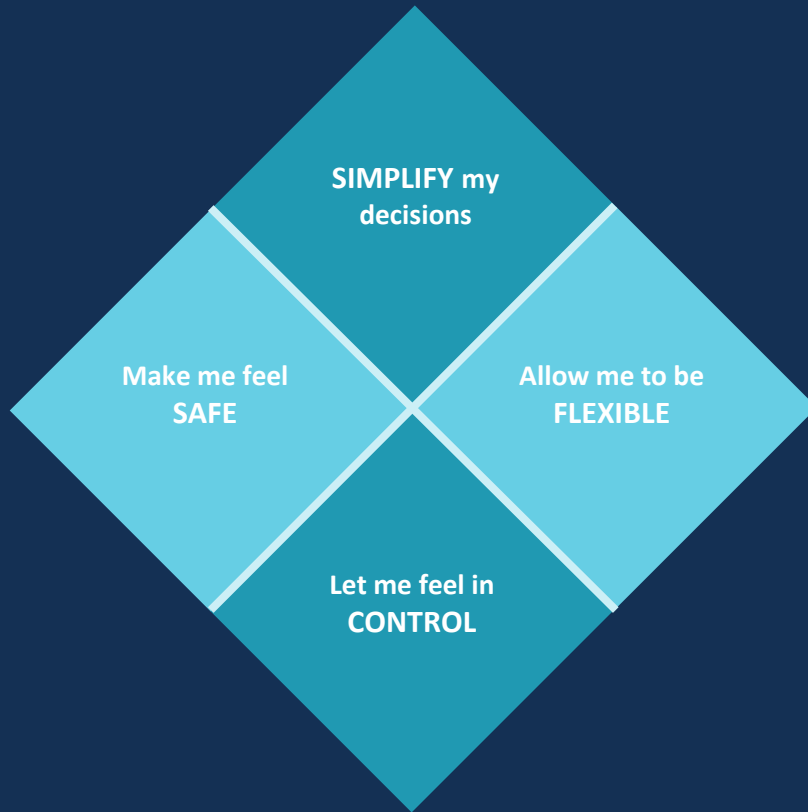
Holistic design vs. collections of features

Current technological solutions are often based on extensions of our existing experiences.

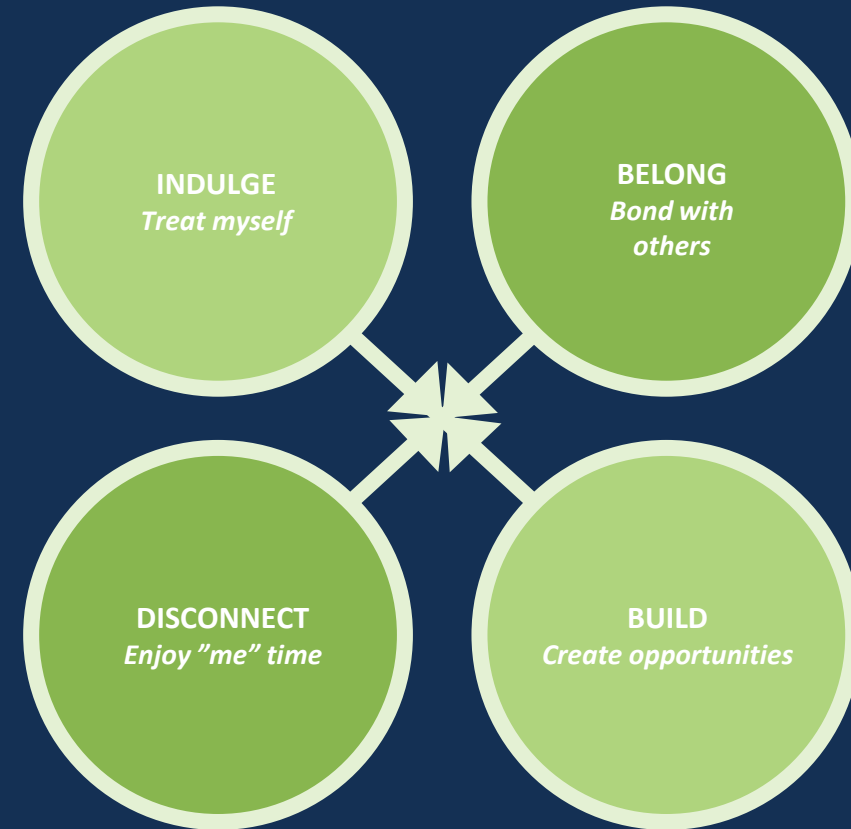
People value cars for experiential qualities — the feeling of the road, comfort, and the pleasure of travel. Unfortunately, “feature-itis” can destroy these qualities by drawing attention to themselves or not working well together.

How can we make sure that adding features will not overshadow the sense of control and exhilaration that we value in the driving experience?

SPECIFIC INSIGHTS LEAD TO UNIQUE OPPORTUNITIES



PRIMARY BASIC NEEDS



SECONDARY ASPIRATIONAL MODES

FROM OPPORTUNITIES TO VALUED EXPERIENCES

Path to building compelling in-vehicle experiences



1. Mix and match value propositions

100s of unique value propositions in the mobility space based on human insights



2. Check relevance with needs framework

Mobility needs framework ensures services answer real user needs



3. Identify potential partners (and competitors)

Scan clusters of companies with specific value propositions



4. Design business models

Canvas for multi-actor business models – is their ROI on the experience?



5. Define service model based on design principles

Adapt and prioritise human-centered design principles to guide development of services

KEY TAKE-AWAYS

1

AV technology isn't in isolation –

EV tech, shared mobility, V2V, V2I create a complex ecosystem for in-vehicle experience development

2

The mobility landscape changes but people's motivations remain constant –

These motivations are instinctual, emotional and rational

3

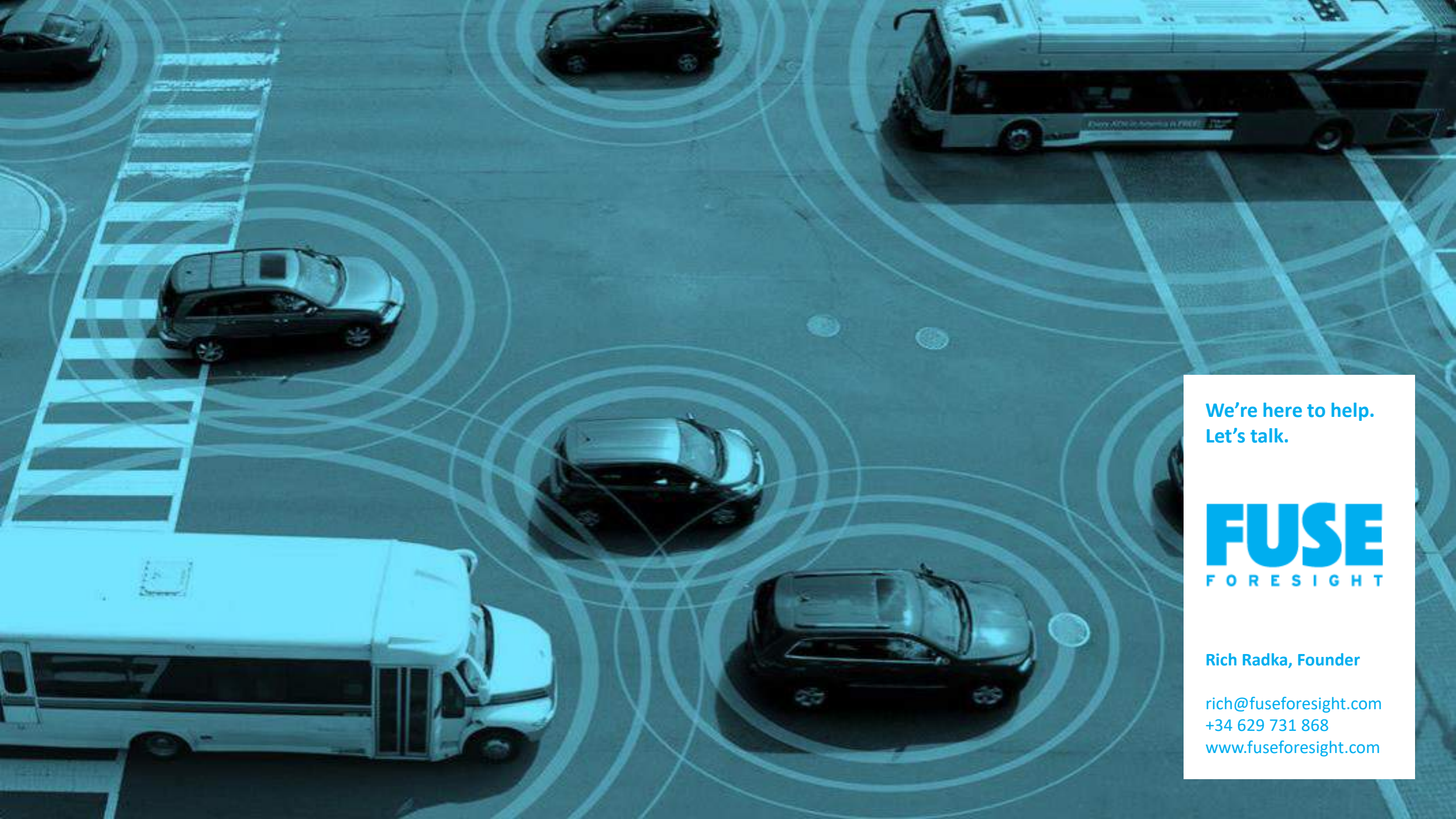
One size does not fit all –

Individual lifestyles and local contexts determine essential specifications for successful services

4

Other factors must be solved for to provide valuable services –

From entrenched digital expectations to changed relationships with vehicle



We're here to help.
Let's talk.

FUSE
F O R E S I G H T

Rich Radka, Founder

rich@fuseforesight.com
+34 629 731 868
www.fuseforesight.com