FROM CONNECTED TO AUTONOMOUS
A Vision for the Future of Automotive Travel
The vehicles of tomorrow will be vehicles of human intent.

Powered by data science and artificial intelligence, vehicles will become mobile platforms that anticipate people’s desires and enrich their travel experiences.

The great question for the automotive industry is how to survive this transformation. In the century since Henry Ford offered consumers any color they wanted as long as it was black, the auto industry has delivered a galaxy of options to the vehicle-buying public.

But the new era will expose trim packages and sport suspensions as a chimera of consumer choice. After all, engineers decide the features we drive home with. In the years to come, emerging technologies will place choice squarely in the hands of consumers.

Of course, engineers will always determine the physical infrastructure—engine, drivetrain, unibody and support systems—of automobiles. But engineers are already losing control of the driving experience as companies like Microsoft, Apple and Google deliver in-vehicle operating systems.

The evolution of the smartphone provides a likely window on vehicles’ transition into mobile platforms. An ecosystem of AI-driven apps will emerge, enabling drivers (and passengers) to customize their travel experiences to suit their precise needs and unique tastes.

As a global leader in mobility solutions with a growing clientele in the connected vehicle space, DMI believes automakers and OEMs have no choice but to embrace these changes. In that spirit, DMI surveyed more than 1,200 U.S. drivers to figure out what they want from automakers in the connected vehicles of the future.

This eBook opens with a quick overview of the survey’s results. In the following section, we advocate a forward-thinking, mobile-first vision for the evolution of automotive travel.
AT A GLANCE
KEY INSIGHTS

DMI’s survey of more than 1,200 U.S. drivers asked them about the connected-vehicle features they would most like to see in the future. We sorted their responses into five feature categories: Safety, Time Savings, Maintenance, Money Savings and Driver Experience. Safety figured most prominently in drivers’ minds, accounting for the top two and four of the top 10 most-desired future features.

**SAFETY**
Respondents showed a strong desire for automated safety features in tomorrow’s connected vehicles. Indeed, the top two in the list of the 10 most-desired future features had safety implications. For instance, 79% of respondents said they would like to see vehicles that can complete a full scan after an accident to determine if the vehicle is safe to drive.

**TIME SAVINGS**
Survey takers said they want features that help them save time while driving. 62% of respondents expressed a desire for potential time-savers such as connecting to prepaid parking. Also, 60% of respondents said they would like the vehicle to convey other travel options based on traffic conditions such as walking distance, bus stops or subway routes.

**MAINTENANCE**
Almost three-quarters of respondents said they would like to see the vehicle keep them apprised of factors like tire status and lifetime value of the vehicle. They would also prefer recommendations on the replacement status of parts on the vehicle.

**COST REDUCTION**
Drivers think tomorrow’s vehicles should help them save money on the road. An overwhelming three out of four drivers said they would like a connected vehicle feature that recommends a more fuel-efficient route.

**DRIVING EXPERIENCE**
Respondents would like tomorrow’s vehicles to deliver more enjoyable driving experiences. 64% of drivers said they would like their vehicle to tell them how their overall treatment of the vehicle—both short and long term—affects the vehicle’s overall condition. Moreover, 61% also would like their vehicle to send driving suggestions based on based on weather, city and time-of-day variables.
车辆在发生事故后通知驾驶员，确认车辆是否安全回家。

车辆进行全面扫描，以便在事故后追踪保养问题。

车辆推荐更节能的出行路线。

车辆自动录制和存储视频或安全录像，以跟踪任何事故或损害。

车辆提供轮胎状态、寿命值、状态和零部件更换的建议。

车辆自动通知紧急联系人（例如工作、家庭、预约）。

车辆提供有关日常和长期治疗如何影响整体状况的数据。

车辆拥有内置的停车通行证，无需支付街边停车或停车场费用。

车辆根据天气、城市和时间的建议驾驶方式。

车辆推荐基于上下文元素的额外旅行选项（例如，由于交通、地铁或地铁更快）。

车辆与其他旅行服务和网络集成（例如，实时航班状态、火车延误）。

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**TOP 10 DESIRED FEATURES FOR THE FUTURE BY DRIVERS**
DMI's survey results reveal broad support for a diverse range of connected-vehicle features in the years ahead. But customer desire is only part of the story. Indeed, today’s vehicles are much like cell phones before the iPhone — innovative enough to satisfy current customers, but poised for a technology-driven transformation.

In the pages to come, Michael Deittrick, DMI’s senior vice president for digital strategy and chief digital officer, outlines a vision of where we see the auto industry going in the years to come. It has five parts:

- **PART 1**
  The CATE model: Connected Autonomous Transport Ecosystem

- **PART 2**
  The Vehicle as a Mobile Platform

- **PART 3**
  Mobile Personas for Every Traveler

- **PART 4**
  Monetization – connecting commerce to the vehicle

- **PART 5**
  Data science, AI and automation

Boxes in each section explore the categories of our survey: safety, time-saving, maintenance, cost reductions and driver experience.
DMI sees the automotive sector as ripe for disruption as mobile technologies become engines of consumer choice. When vehicles become networked platforms, travelers will expect applications that adapt to their unique needs.

“Choice is a major factor in people becoming loyal to brands,” says Michael Deittrick, DMI’s senior vice president for digital strategy and chief digital officer. DMI believes that automakers who embrace consumer choice stand the best chance of fending off disruptive upstarts.

To help automakers adapt, DMI developed a framework called CATE (Connected Autonomous Transport Ecosystem). “We started with the outcome we anticipate—fully autonomous vehicles—and worked our way back from there,” Deittrick says. CATE envisions an agile, voice-driven driving experience that adapts to each new wave of technology as it arrives. It has three sub-frameworks:

Connected: Where we are now—automakers and OEMs integrating mobile technologies into the driving experience.

Hybrid: Where we’re going in the next five years—adapting ever more automation and transitioning vehicles into networked mobile platforms.

Autonomous: Where we’ll be in a decade—automated technologies take over the driving, creating a travel landscape radically different from the one we occupy today.

The auto industry must shift its perspective throughout this continuum, Deittrick says. “In the current connected framework, carmakers are thinking inside-out, connecting drivers to the outside world,” Deittrick says. “We have to start thinking outside-in, pulling the outside world into the driving experience.”

An outside-in perspective integrates external networks, databases, applications and technologies into in-vehicle operating systems. That allows each driver and passenger to import shopping, tourism, commuting, parking, and many more activities in ways they only dream of today.

“Our survey shows drivers clearly want access to content in their vehicles,” Deittrick says.

In the hybrid framework, innovations in data science, machine learning and automation help automakers improve safety and increasingly customize the driving experience to suit each person’s tastes and desires. As automation advances, vehicles will scan their exterior environment and help the driver decide what to do next—from an automated lane change to a distinctly human travel experience.
“If you’re driving past the Washington Monument, your vehicle will recognize it and ask you if you want more information on visiting it,” Deittrick says. Parking garages, restaurants and other destination businesses will be able to project availability to customers. In-vehicle assistants will make reservations for people in transit.

In the fully autonomous framework, everybody becomes a passenger. 5G mobile networks empower mobile platforms that replicate driving. Vehicles read their environments while processing volumes of the data far beyond the capacities of the human brain. The vehicle understands the context of travelers’ intentions, informed by their location, destination and previous travels.

As a global mobile technology integrator, DMI expects to develop backend systems that help automakers bring this vision to reality. “Engineers will create the technologies that enable autonomous vehicles,” Deittrick says. “DMI will leverage the data these systems generate to create richer connected experiences.”

**BOX 1: SAFETY IN THE AUTONOMOUS ERA**

In the transition to the hybrid framework DMI envisions, vehicles should become safer. For instance, using data science and machine learning to merge massive data sets and add reliable driving-assist features can remove human factors that heighten highway dangers.

“Automation and data collection that are separate from human interaction always enhances safety,” DMI’s Michael Deittrick says. “The information is processed faster and understood sooner, and it enables predictions. Human beings can’t do that.”

The greatest challenge will emerge in the autonomous framework—convincing people to take their hands off the wheel and let the vehicle do the driving.

“Trust is the biggest issue in autonomous vehicles,” Deittrick says. “People have to look at the decisions a vehicle makes and feel confident they would’ve made the same choice.”

Trust is an emotion-driven, purely human condition that a machine may never be able to replicate. But machines can be configured to amass data about their environment to make smart decisions that remove emotion from the equation.

“The question is, how do we appeal to the emotional aspects of drivers giving up control,” Deittrick says. “Well, control is an illusion. We’re never totally in control because we can’t control everything around us.”

The designers of autonomous vehicles have to develop technologies that read a vehicle’s external environment and develop predictive capabilities. “When the vehicle does something you can’t do, that’s big,” Deittrick says. Proving that vehicles can outperform human drivers will be central to ceding control and building trust. “Then the trust will allow people to believe the vehicle is safer,” he says.
DMI’s CATE framework envisions vehicles evolving into voice-activated, networked mobile platforms built on four anchors:

- **Connectivity**: Mobile technologies make each automobile a node on the global internet.

- **Human-centered design**: Technology documents behaviors, anticipates desires and enables consumer choice.

- **Autonomous capabilities**: Automation goes where it makes the most sense on the way to creating fully autonomous vehicles.

- **Data-driven focus**: Applications, databases, IoT sensors, vehicle data and analytics empower travelers.

Today’s automobiles connect to GPS satellites, cell-phone networks and cloud-hosted applications, but they’re not networked in the conventional sense. That will begin to change as enhanced 4G and high-capacity 5G wireless networks redefine the possibilities of mobile networking.

“Connectivity needs to evolve away from telematics and toward dynamic networks,” DMI’s Michael Deittrick says. “When that happens, vehicles become networked platforms—nodes on a network like PCs that can talk to each other.”

A raft of technicalities will have to be worked out, such as how vehicles from disparate brands communicate with each other. But the essential innovation will be adding vehicles to the global network. “That’s where we make the transition to a truly human-centric data platform,” Deittrick says.

57% of drivers want future vehicles to integrate with other travel services and networks.

**Box 2**

Human-centered design, one of DMI’s core competencies, will become crucial in the new networked environment because it’s built on a foundation of user choice. The network will allow drivers to pull everything they enjoy in smartphones and PCs into their driving environment.

Deittrick believes in open ecosystems that facilitate consumer choice. “A closed ecosystem owned by the OEM focuses on what a brand wants to deliver, instead of allowing humans to determine what they want delivered into their vehicle. That reduces choice,” Deittrick says.

In the new environment, drivers should be able to choose the content that best suits their personality.
“That’s what revolutionizes how vehicles are used and how much time people spend in them,” Deittrick says. “And it will change transportation forever.”

Emerging autonomous capabilities will help propel the revolution. “Right now, people are just focused on ‘can a vehicle drive itself?’” Deittrick says, but there’s a lot more to think about as automation evolves.

For instance, today’s GPS systems can help drivers chart a path linking two destinations. But AI-assisted systems could let drivers change their destinations on the fly, pull in content explaining the appeal of multiple attractions and help them build a genuinely human-centered experience.

Fully autonomous vehicles pose deep questions about the meaning of travel. How will people’s behavior change when there’s a bot behind the wheel? Will they travel more or less? Will they feel more need to own a vehicle, or will the ownership model collapse?

Data science will glean insights from an ever-growing collection of information sources to answer these and many more questions. Principally, data analysis delivers two key insights: where we need to go and what we’ve been missing. “When you put these two pieces together, then you can transform the human experience through an understanding of the information,” Deittrick says.

“BOX 2: SAVING TIME WITH AUTOMATED ASSISTANTS

Today, tech titans like Amazon, Apple and Google are winning consumers with advanced digital assistants that perform a host of everyday chores, saving people time and simplifying their lives. Those who use time-saving digital assistants at home naturally want them in their vehicles.

Voice-activated technologies will be crucial to the evolution of safe digital assistants in vehicles. Automakers might think, ‘we’re not in the natural language processing business, how can we do that?’” DMI’s CATE framework provides a straightforward answer: a voice assistant that reaps the advanced functionalities of popular voice-command systems.

“The voice-activated component of CATE is really just an abstract assistant that talks to other assistants,” DMI’s Michael Deittrick says. “This reduces costs because we don’t have to build a large AI capability. Instead, CATE creates a relationship between the vehicle and people’s preferred content providers. If travelers use Google, Alexa and Siri, then CATE should talk to them—just as if it was their best friend."

CATE will rely on automation and APIs to help automakers embrace the choice-driven future of travel. That gives incredible freedom to carmakers because they don’t have to choose one technology and then lose every traveler who does not use it.

“If I’m an OEM, I don’t have to decide whether my voice assistant is Android-based or capable of leveraging Alexa, Google Home or Apple Car,” Deittrick says. “CATE lets me offer all three. If another assistant emerges, we just teach CATE how to talk to it.”
PART 3

MOBILE PERSONAS FOR EVERY TRAVELER

CATE anticipates the development of sophisticated digital personas that accompany travelers everywhere they go — enabling a wealth of choice along the way.

Personas will take at least three shapes:

- **Drivers:** Their personas go with them to each vehicle they drive.
- **Passengers:** Vehicles become less driver-centric as people develop distinct passenger personas.
- **Non-owner models:** Personas follow people when they borrow, rent or rideshare.

A digital persona documents a traveler’s destinations, purchases, habits and interests. Next-generation mobile apps will use AI and machine learning to place persona data in the context of a current trip, whether it’s to the corner store or across the country. Imagine asking CATE for movie recommendations. CATE notes you’ve seen six sci-fi movies in the past year, finds out where the latest Star Wars sequel is playing, buys a ticket and reserves a parking space in a nearby garage.

74% of respondents said they’d like to see future vehicles that review tire status, lifetime value, recommendations on status and replacement.

Box 3

Moreover, sub-personas can personalize the driving experience in countless ways.

“Today I’m driving on business, so I have my business persona,” DMI’s Michael Deittrick says. “If I’m on vacation with my family, my persona has a vacation mode.” Group personas can merge the interests of multiple family members or guide people traveling in multiple vehicles.

All these variations influence the content a driver pulls into the vehicle. “The content would change based on the people you surround yourself with,” Deittrick says. So, your connected vehicle delivers different content choices if you’re driving to a golf outing or taking the kids out for pizza.

Personas also can overcome the driver-focused design of today’s in-vehicle experiences. “The passenger experience can become as contextual as the driver’s experience,” Deittrick says.
“We have to start thinking that everybody is worthy of getting content,” Deittrick says. “And how do I give everyone a single unique experience or a mixed group experience?” If the in-vehicle AI understands a family is vacationing together, for instance, it can facilitate connectivity between the kids and their parents, nurturing unique travel moments.

The CATE model gives carmakers the flexibility to shift with ownership patterns. If travelers embrace more ride-sharing and buy fewer vehicles, personas can still travel with them in any vehicle, anywhere in the world.

“We’re talking about transforming the way that people interact with their vehicle: changing it from a transport device into a node on a network that happens to be mobile,” Deittrick says. “And if we start to think of it that way, we can stop thinking of the vehicle in the engineering sense and start thinking of it as a place we spend time—and how valuable that particular time is.”

All this flows from the immense personalization options that come from embracing traveler personas and folding them into the driving experience.

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**BOX 3: KEEPING VEHICLES PHYSICALLY FIT**

Such features would be an improvement over today’s in-vehicle maintenance experiences, which may include a message flashing on the dashboard telling the driver it’s time for an oil change.

As predictive analytics become more sophisticated, our vehicles may be able to predict the lifespan of essentials like tire tread, brake pads and hydraulic fluids. The CATE model anticipates the ability to connect on-board maintenance data to dealerships, quick-oil-change shops, and other service providers. “CATE could send a driver alert that says ‘your oil has another 200 miles. Would you like me to schedule an oil change?’ It’s location- and context-aware, so it knows how to fix the problem,” DMI’s Mike Deittrick says.

Picture an automated assistant removing the hassle of setting up repairs at the dealership.

“When dealership schedules become electronic, CATE can say ‘12:00 to 12:30 is open at your dealer on Wednesday, October 21st. Can I book that for you?’” Deittrick says. “If that time doesn’t work, CATE keeps trying until you’re satisfied.

“So, it has this whole iteration model of intent that helps you get your vehicle fixed,” Deittrick says.

The autonomous era kicks everything up a notch, Deittrick says. “CATE says, ‘If I drop you off here for lunch, I can drive myself over to the dealer, get everything fixed and pick you up at 2:00.’ That’s mind-blowing, right?”
One question cannot be ignored: Who’s going to pay for all this? DMI’s CATE model anticipates multiple possibilities, based on:

- **Financial incentives:** Merging the interests of travelers, destination businesses, and automakers.
- **Revenue sources:** Identifying opportunities to create value and generate cash flow.
- **Open architecture:** Tapping into a commercial network rather than inventing or creating one.

Carmakers and OEMs need a financial incentive to participate in the CATE framework. DMI’s Michael Deittrick says the opportunities are abundant—if you know where to look.

“My number one rule is working backward from the outcome,” Deittrick says. “That helps you identify all the little pieces that have to occur all the way back to the point of origin.”

The pieces of the monetization puzzle include restaurants, hotels, toll booths, quick-oil-change shops, car dealerships and countless other travel destinations. If people go there and spend money, there’s an opportunity to monetize it.

“When you know all the players, you can start creating real value for the customer by understanding what’s feasible across all the people and the vendors,” Deittrick says.

Consider a simple parking garage in the downtown of large city. ‘Automakers don’t make a dime when their vehicles park there today,’ Deittrick says. Moreover, they have no interest building parking garages—or any other businesses that people drive to.

But what if their vehicle is a networked mobile platform that can automatically reserve a spot in a parking garage? Then, the automaker can take a small transaction fee in exchange for helping the garage fill its parking spaces. “It’s a small piece of the pie, but if you do that across 10 million vehicles, it’s millions of dollars a day. Automakers aren’t getting any of that.”

Open architecture makes this possible. Automakers and OEMs do not have to build a large monetization platform or extract fat commissions from

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75% of the drivers favored in-vehicle sensors to help find the most fuel-efficient route for trips.

*Box 4*
PART 4 (continued)

MONETIZATION – CONNECTING COMMERCE TO THE VEHICLE

businesses. Instead, they participate in a commercial network enabled by traveler choice.

“CATE envisions an ecosystem where merchants access your system and participate in your platform model,” Deittrick says. “You can create advocacy from your vehicles to the platform to the merchant and create an entire transactional history. It will allow you to do as credit cards do: charge a merchant for participating.”

Ultimately, it comes down to creating value—for travelers, merchants and automakers. In the networked future of travel, picture the challenges confronting a mom and dad on vacation. They need to find a hotel 200 miles down the Interstate, refill the gas tank and feed the family. They’ll derive genuine value from an in-vehicle assistant that handles these chores. And all the merchants have customers they might otherwise miss.

“This is the beauty of open architecture: All the automakers have to do is facilitate access to the network,” Deittrick says.

BOX 4: COST REDUCTION—SLICING SHORT- AND LONG-TERM TRAVEL EXPENSES

As software becomes more sophisticated, networked vehicles will be able to offer this and similar budget-friendly features.

Traveler personas will create parameters for travel based on real-time priorities. These parameters can help travelers save time and money.

“Let’s say you have to be at an important meeting in 45 minutes and you’re 30 minutes away,” DMI’s Michael Deittrick proposes. “CATE looks at your persona and helps you get the most value from that extra 15 minutes. Do you grab lunch in a drive-thru and eat in the vehicle?”

The mom on vacation who wants enriching cultural experiences for her children has different goals in mind. Perhaps she’s willing to pay more for gas or hotels if they are near attractions she wants the kids to see. CATE’s prediction model helps her resolve these challenges quickly and efficiently.

“That’s the real power and value of what we’re talking about here,” Deittrick says.
Advanced computing technologies will simplify the lives of travelers at every point in the transition from connected to hybrid to fully automated vehicles. DMI sees three key issues:

→ **Data science**: Gleaning crucial insights from multiple data sets.
→ **Predictive analytics**: Detecting patterns to anticipate travelers’ desires.
→ **Ethical models**: Delivering value while protecting travelers’ privacy.

Data science will inform every facet of the CATE framework. “Data science improves our understanding of the vehicle’s maintenance history—what it needs, what it wants and how people actually use it,” DMI’s Michael Deittrick says.

That data can be correlated to everybody who uses the vehicle and all of their destinations. Insurance company might slice the data to ensure low-risk drivers pay lower rates. “Looking at all these pieces and pulling data from the system helps us make better decisions,” Deittrick says.

AI and automated assistants will place data science in the context of people’s personas, driving habits and marketplace preferences. “Those abilities allow us to understand what the data really means,” Deittrick says.

Predictive analytics will use software to analyze people’s activities and offer up options based on past behavior — theirs and other people’s. “Predicting what will happen is not based on the individual,” Deittrick says. “It’s based on massive amounts of information about people in similar situations. These similarities allow us to do predictions.”

It’s crucial to understand that automation is about helping travelers reach smarter conclusions faster than they could do on their own. It’s not about turning decisions over to the machines. “We shouldn’t let the AI decide how we’re going to get someplace,” Deittrick says. “It should be allowed to recommend how to do something.”

Moreover, people have to think long and hard about the ethical implications of network-connected vehicles. “Vehicles are one of the most trackable
BOX 5: DRIVING EXPERIENCE, AI AND VOICE COMMANDS

DMI’s CATE framework expects voice-driven AI to become pivotal to the driving experience of the future. Developers of future driving experiences need to understand that people will not be getting into complex conversations with the bots behind their dashboards, DMI’s Michael Deittrick says.

The human brain does an excellent job of capturing context and nuance—subtle variations in tone, emphasis and body language that confound AI-informed algorithms. Picture asking CATE what to do on a sunny day. CATE could answer “how about going to the beach?” If you reply, “OK. Which beach is nicest?” CATE cannot say, because “nice” is a nuance that mystifies a bot.

An automated assistant can be programmed to capture the intent of travelers, asking a series of questions that help the human zero in on an ultimate answer. But what if the bot just can’t figure out what you mean by “nice”?

“This creates a whole new business model for automakers, putting people to work using human insight to help people do everything the bots cannot do,” Deittrick says.

devices in the world,” Deittrick notes. Are drivers ready to swap their location data for access to real-time services? Will merchants feel comfortable handling this data? How do we keep the hackers out?

“With AI and data science, how do we create ethical models around data collections that are still valuable to all the third parties participating in the platform,” Deittrick asks, “while also ensuring user privacy, capability and value?”

A fully networked, AI-enhanced vehicle can solve a spectrum of human challenges, but some questions require people to find the answers.

Data science will glean insights from an ever-growing collection of information sources to answer these and many more questions. Principally, data analysis delivers two key insights: where we need to go and what we’ve been missing. “When you put these two pieces together, then you can transform the human experience through an understanding of the information,” Deittrick says.

PART 5 (continued)
DATA SCIENCE, AI AND AUTOMATION
Change is in the wind for automakers and OEMs. Engineering-driven companies must reorient themselves to an evolving consumer-driven marketplace. People who have spent decades designing, manufacturing and marketing devices—from brake pads to infotainment centers to SUVs—need to shift their perspective.

“Don’t focus on the device,” DMI’s Michael Deitrick advises. “Focus on the software.”

As vehicles evolve into nodes on the global network, software will help the automotive industry deliver consumer choice on a global scale. Digital personas will ensure travelers get what they want, when they want it, and wherever they want it. AI, data science and machine learning will help automakers integrate ecommerce into people’s travel experiences.

DMI’s CATE framework gives the auto industry a vision for making this future happen. Built on open standards, much like today’s internet, CATE addresses the desires of travelers accustomed to the app-rich world of the smartphone.

The deeply personalized travel of tomorrow poses a stark choice for the auto industry today: Embrace the coming mobile ecosystem or watch somebody else do it.

CONCLUSION

CONSUMERS WILL DECIDE THE FUTURE OF TRAVEL
DMI INSIGHTS

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