

Automotive Research Topical Report

Telematics Systems 2009: Here to Stay

By Anna Buettner, Analyst

Forecast

Frequency, Time Period

- 8-year historical data
- 7-year annual forecasts

Measures

- Auto attach rates
- Unit sales
- Revenue
- OEM
- Aftermarket

Regions, Markets

- USA
- N. America
- France
- Germany
- Italy
- UK
- W. Europe
- Japan
- China
- Asia-Pacific
- Other regions
- Worldwide

Applications/Products Covered

- OEM telematics
- Aftermarket telematics

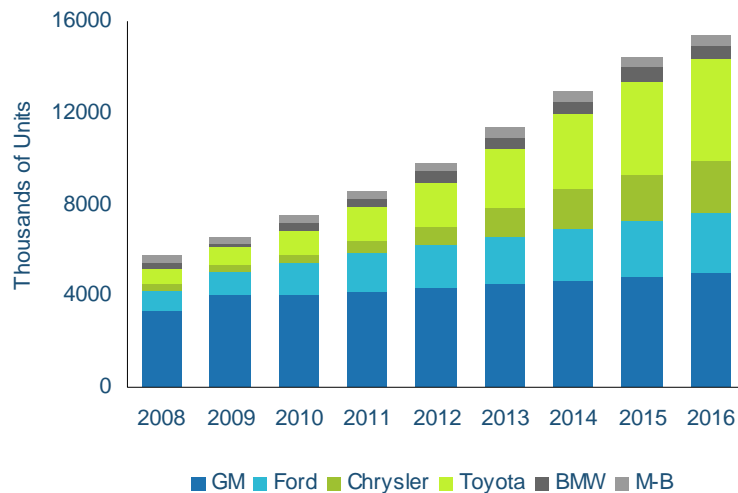
Technologies Covered

- Embedded or monitored telematics
- Non-embedded or non-monitored telematics

Telematics has finally reached critical mass in many regions around the globe. All major OEMs have committed to the introduction of telematics in some shape or form. While safety and security features are still the most prevalent form of telematics, these services will turn into commodities over the years. Connected “premium” services are necessary to improve telematics retention and average revenue per user (ARPU). In the meantime, these services add daily relevance that users can relate to, and more importantly, will be willing to pay for. In other words, a sole reliance on safety- and security-related services will not be sustainable, and OEMs should instead leverage them as base applications and include other applications with frequent usage that can constitute premium services.

iSuppli also believes that telematics will become a communication platform for many applications and services that go across all auto domains—powertrain, chassis, ADAS and infotainment. This linkage will further strengthen the power of telematics within the vehicle.

USA Telematics Sales by Key OEMs



Critical Questions Answered

- What are the main approaches for telematics platforms?
- What are the expected sales by telematics platforms?
- How do regions vary in telematics adoption rates?
- What auto manufacturers are leading the telematics market?
- What are telematics sales forecast by automotive OEMs?
- Who are the leading telematics service providers?

Who Should Read This?

- Automotive OEMs
 - Product planning
 - Competitive analysis
 - Strategic Planning
- Automotive Tier 1-3 Component Suppliers
 - Marketing
 - Product planning
- SC/Systems/Software Suppliers
 - Marketing

Analyst

Anna Buettner, Analyst

At iSuppli, Anna is responsible for the study and research on Germany's automotive and telematics market and analyzes German domestic OEMs. She is also responsible for the management of EMEA Automotive and services content.

Prior to iSuppli, Anna worked with policy research organization Center for Rural Policy and Development as a Researcher to evaluate issues from a rural perspective. She analyzed the economic, demographic and cultural factors that affect rural Minnesotans and their communities.

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Table of Contents

- Introduction
- Telematics Overview
 - Wi-Fi Availability Across Regions
- Findings and Implications
- Telematics Market Status
- U.S. Telematics Market Status
 - GM and OnStar
 - BMW Telematics
 - Mercedes-Benz Telematics
 - Ford Telematics
 - Toyota Telematics
 - Chrysler Telematics
 - Other OEMs
- European Telematics Market Status
 - BMW Telematics
 - Fiat Telematics
 - PSA Telematics
 - Volvo Telematics
 - Other OEMs
- Japan Telematics Status
 - Honda Telematics
 - Nissan Telematics
 - Toyota Telematics
 - Other OEMs
- Telematics in Other Regions
- Telematics Market Forecasts
 - U.S. Telematics Forecast
 - Worldwide Telematics Forecast
 - Regional Telematics Forecast
 - Telematics Forecast by OEM
 - U.S. Telematics Forecast by OEM
 - Western Europe Telematics Forecast by OEM
 - Japan Telematics Forecast by OEM
- Conclusion
- Appendix A: Telematics Definitions
- Appendix B: Telematics Availability by OEM Brands
 - U.S. Telematics Availability by OEM Brands
 - Western Europe Telematics Availability by OEM Brands
 - Japan Telematics Availability by OEM Brands

Figures

- Connected Car Technology Evolution
- U.S. OEM and Aftermarket Telematics Sales
- U.S. OEM Telematics Sales
- U.S. OEM Telematics Retail Value
- Worldwide OEM and Aftermarket Telematics Sales
- Worldwide OEM Telematics Sales
- Worldwide OEM Telematics Retail Value
- Regional OEM Telematics Sales

- Europe and Asia-Pacific OEM Telematics Sales
- Regional OEM Telematics Retail Value
- U.S. Telematics Sales by OEM
- Western Europe Telematics Sales by OEM
- Japan Telematics Sales by OEM
- Telematics Functional Definition

Tables

- Telematics Segmentation
- Wi-Fi Availability Across Regions
- Telematics Landscape
- Embedded Telematics Availability Trend
- Mobile Device Telematics Availability Trend
- GM Telematics Status
- BMW Telematics Status
- Mercedes-Benz Telematics Status
- Ford Telematics Status
- Toyota Telematics Status
- Chrysler Telematics Status
- Other OEM Telematics Status: USA
- BMW Telematics Status
- Fiat, Lancia, Alfa Romeo Telematics Status
- Peugeot Telematics Status
- Citroen Telematics Status
- Volvo Telematics Status
- Other OEM Telematics Status: Western Europe
- Honda Telematics Status
- Nissan Telematics Status
- Toyota Telematics Status
- Other OEM Telematics Status: Japan
- Other Countries with Monitored Telematics
- Telematics Forecast Summary
- U.S. Telematics Forecast
- Worldwide Telematics Forecast
- Auto Manufacturers' Brands
- Telematics User Segments
- Telematics Acronyms
- Embedded Telematics Availability: U.S.
- Bluetooth Mobile Device Telematics Availability: U.S.
- Embedded Telematics Availability: France, Germany, Italy, UK
- Bluetooth Mobile Device Telematics Availability: France, Germany, Italy, UK
- Telematics Service Availability: Japan
- Bluetooth Mobile Device Telematics Availability: Japan