China Passenger Car Telematics Industry Report, 2014-2017

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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.

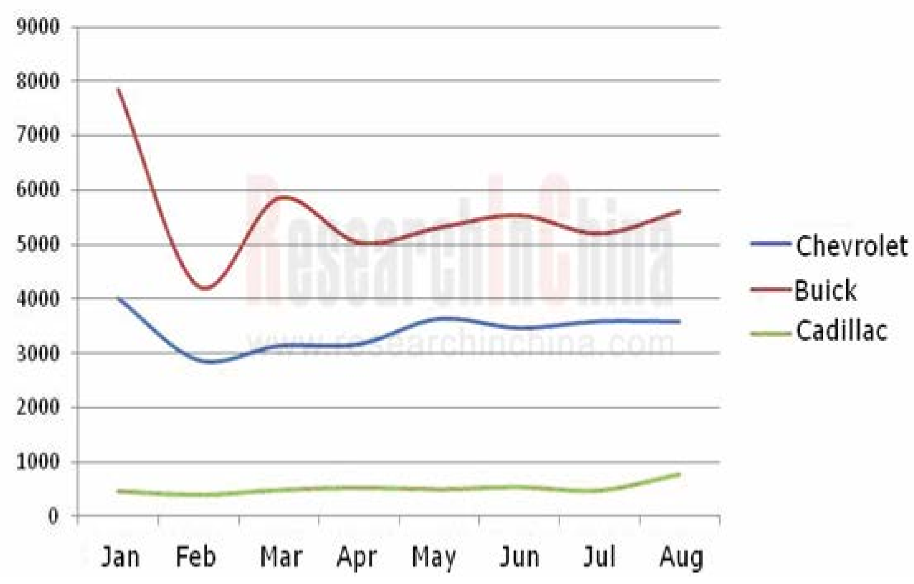
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Since GM OnStar and Toyota G-Book officially embarked on China's market in 2009, passenger car brands have launched their own Telematics products, such as Ford SYNC, Nissan CARWINGS, SAIC InKaNet, HondaLink, Geely G-NetLink, Mercedes-Benz CONNECT, Volvo Sensus, BMW ConnectedDrive, Yueda KIA UVO, Dongfeng Citroen Connect, Dongfeng Peugeot Blue-i, Hyundai Blue Link, Changan in Call, Chery Cloudrive and so on.

In order to occupy "the fourth screen" in the mobile Internet era, domestic and foreign Internet giants begin to highlight Internet of Vehicles (IOV) in 2014, for example, Apple has released CarPlay vehicle system, Google has launched Android Auto, Alibaba has acquired AutoNavi and cooperated with SAIC to develop connected vehicles, Tencent unveiled Lubao Box and held stake in Navinfo, Baidu collaborated with TimaNetworks to launch CARNET. As China's position in the global automotive market becomes more important, the competition in the Chinese passenger car telematics market will turn to be more intense.



Chinese passenger car telematics market falls into OEM market and aftermarket. The traditional OEM market focuses on traffic safety, such as remote assistance and other functions; the aftermarket emphasizes entertainment and other personalized services. However, OEM brands have paid more attention to the combination with mobile Internet and hope to make users have better experience; coupled with their inherent advantages in the industrial chain, they expect to master higher market share in the future.

There were more than 4,000 enterprises engaged in telematics aftermarket in China around 2012, but most of them have closed down or been struggling to survive now. For now, even large suppliers (like PATEO and Chinatsp) linked with considerable automobile companies see unsatisfying profitability. The fundamental reason lies in the lack of eye-catching telematics applications which users are eager to pay for. Navigation and radio of the traditional vehicle information system are the most frequently used functions for users. Telematics vendors intend to introduce a variety of innovative applications to intensify user viscosity, but they see little effect, which directly makes the telematics activation rate of new cars remain at less than 30%.

In the Chinese passenger car telematics market, GM OnStar has always played a leading role. In the first eight months of 2014, OnStar developed about 77,000 new passenger car users in China, and the majority of them were Buick owners.

Currently, the second-ranked passenger car telematics brand is Ford SYNC. In the first eight months of 2014, Ford SYNC attracted about 48,000 new users in China.

In the future, Telematics should not only function as a marketing tool for automobile enterprises to enhance sales volume, but also a product that users really need. In order to stimulate consumption, all manufacturers need to accelerate the integration of IVI and mobile Internet devices to provide users with diversified mobile Internet value-added services, as well as vigorously promote mobile mapping and connection with smart wearable devices to serve customers considerately.

With the participation of a large number of Internet companies and enriched telematics services, the activation rate of passenger car telematics services in China is expected to keep rising, and the telematics user base will also expand rapidly.

The report includes the following aspects:

- Overview of Chinese passenger car telematics market (including market profile, industry chain, market size, service contrast, product support, etc.)
- Analysis on Chinese passenger car telematics brands (embracing business, pricing, number of new users, supported vehicle models, development strategy, technological trends, etc.);
- Chinese passenger car TSP enterprises (products, business, application cases, customer structure, development modes, etc.).

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