

Report on Chinese Automakers' Telematics Products in 2019

June 2019

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.

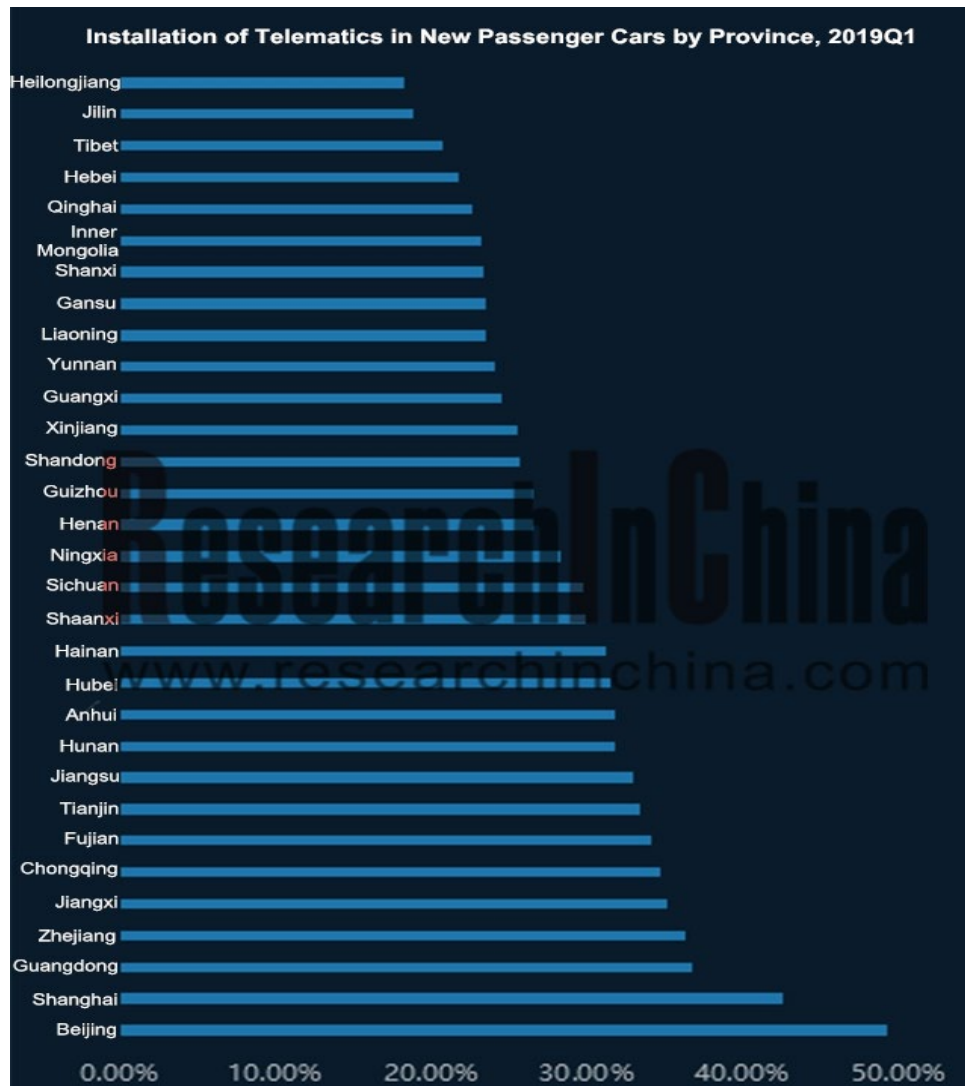
Abstract

It is Shown from the Findings of Our Research on Chinese Automakers' Telematics Products: Telematics is Available to 49% New Vehicles in Beijing, Compared with a Mere 18% in Heilongjiang.

In the first quarter of 2019, Beijing, Shanghai and Guangdong stay ahead of other provinces in availability of telematics in new passenger cars, with rates of 49.2%, 42.5% and 36.7%, respectively; Jilin and Heilongjiang were left behind with installation rates of 18.9% and 18.2%, respectively, far below the country's average of 30.2%, according to Report on Chinese Automakers' Telematics Products in 2019 we released recently.

Automotive telematics solution falls into built-in and external types. Built-in telematics system enables vehicles with direct connectivity; external telematics system offers connectivity for vehicles via a smartphone or other devices. Built-in telematics system has become the mainstream configuration for new vehicles as ever more of them used the system in recent two years, making the external type give its way to it. In 2018, telematics (built-in + external) installation rate in China just rose a bit.

Only in terms of built-in telematics system, installation of telematics in new vehicles has soared, expectedly up to 51.9% in the fourth quarter of 2020 compared with a mere 11.94% in the first quarter of 2017.



Installation of Telematics in New Passenger Cars in China, 2017Q1-2020Q4



The report compares and analyzes telematics products of more than 10 Chinese automakers from the aspects as follows: features, technology providers, human-machine interaction, communications, map and navigation, voice, big data and service, dashboard and central console, car owner's APP, remote control, cloud technology, in-vehicle infotainment, mobility services, life services, car-home interconnection deployment, pre- and after-sale services, charge mode, installation of telematics products, installation by province and municipality, etc.

Comparison of Features between Telematics Products of Typical Automakers

Telematics Product	SAIC	Geely	Changan	BYD	Dongfeng Fengshen	Great Wall	NIO	Xiaopeng Motors
	Banma Zhixing	GKUI	In Call 4.0	DiLink	WindLink 3.0	WEY Intelligent Interconnection	NIO	Xmart OS Intelligent System
Vehicle information display and settings	√	√	√	√	√	√	√	√
Map-based navigation	√	√	√	√	√	√	√	√
Entertainment system (radio, music, social media, etc.)	√	√	√	√	√	√	√	√
Bluetooth phone	√	√	√	√	√	√	√	√
Driving data	√	√	√	√	√	√	√	√
Vehicle localization and monitoring	√	√	√	√	√	√	√	√
OTA updates	√	√	√	√	√	√	√	√
Remote lock/unlock door	√	√	√	√	√	√	√	√
Remote air-conditioner control	√	√	√	√	√	√	√	√
Remote flashing/honking	√	√	√	√	√	√	√	√
Emergency rescue	√	√	√	√	√	√	√	√
Car-home interconnection	√	√	√	√	√	√	√	√
Payments	√	√	√	√	√	√	√	√
Prompt for travel restriction	√	√	√	√	√	√	√	√

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