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Global Automotive Infotainment Technologies Market 2013-2023: In-Car Audio, Entertainment & Navigation

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Abstracts

The infotainment technologies market encompasses information and audio visual entertainment systems for the purpose of navigation, safety, security, communications and leisure. In recent years in-vehicle infotainment (IVI) has seen substantial growth with the increased popularity of smartphones and tablets. IVI in its current form has been around since the 1990s but improvements in computing technology and the wireless infrastructure have resulted in new possibilities. Meanwhile consumer expectations are also changing ensuring steady growth of demand, forcing vehicle manufacturers to offer advanced infotainment systems in their cars. Visiongain assesses that the global automotive infotainment technologies market will total $31.72bn in 2013.

Most current infotainment systems are mimicking the interface found on tablet computers and smartphones. This has been a positive development for automotive OEMs but it has also showed some of the weaknesses of the current automotive infotainment industry.

The biggest and most obvious disadvantage of the majority of infotainment systems is they feel dated and underdeveloped compared to modern tablets. These shortcomings are somewhat inherent to automotive infotainment as development times for vehicles are so much longer than for other consumer technology. However, it is also somewhat caused by the automakers' inadequate approach in developing their head-unit infotainment systems. Carmakers have so far mostly set themselves the goal of integrating existing automotive technology in a touch-screen head-unit that resembles a smartphone or tablet computer. This has resulted in systems that provide very little to no gain in usability and do not offer any additional functions or benefits either. Although this would seem a logical progression in terms of automotive technology, it is a glaring

deficiency in terms of infotainment in general.

The difference between what automotive infotainment currently offers and what is technologically possible and expected is most obvious to people who are used to modern technology. Unfortunately for carmakers this group of people is exactly the target-group they are trying to reach with their new touch-screen head-units.

This approach of the automotive industry is unlikely to be accepted by tech-savvy consumers for long. Moreover automotive infotainment systems are hindered by being almost unacceptably poor value for money to consumers; the most simple systems start at similar prices to top of the line tablets such as the Apple iPad and offer smaller, lower resolution screens, vastly less functionality and limited practicality from being built-in. More advanced systems are even more expensive but are usually offered as part of a package of active safety systems making them more marketable and offering slightly more potential for the future.

The pricing issue nevertheless shows that carmakers are unable to compete with consumer technology companies on value or content. As an increasing number of people own portable touch-screen devices, collaboration between tech companies and automotive OEMs seems inevitable. It is likely that the long product and development cycle of the automotive industry has been the only factor that has prevented this kind of cooperation from happening so far. Indeed, Apple is offering integration of its Siri (voice-control) and Maps technology in cars and has recently announced that its mobile operating system (iOS) will be coming to nine brands.

Apple's move into the head-unit software market is certain to shake up the sector and push all carmakers to reconsider their infotainment business models. Increased competition in this sector will put some pressure on unit prices but the battle is more likely to be focused on features and usability than on price.

A positive effect of increased competition and improved built-in software will be that head-units can regain competitiveness against external devices such as smartphones and tablets. Competition will continue to increase in this market sector. Google already offers its 'Maps' application in some vehicles but following Apple's move it is undoubtedly making plans to put its Android operating system in vehicles as well.

Bluetooth and USB connectivity are also becoming ubiquitous in vehicles and GPS and navigation applications are similarly omnipresent in touch-screen devices. This will slowly negate some of the need for separate touch-screen devices at home and in a vehicle.

This trend will mainly hit the lower, less expensive automotive segments where carmakers are struggling to offer value for money in the tech area and at the same time attempting to cut costs. Higher segment vehicles may turn out to be relatively immune to the trend of external technology due to the aforementioned safety packages as well as the lower relative price of infotainment.

There have also been concerns about the safety risks of using infotainment systems whilst driving. Regulations about the use of infotainment will certainly create some challenge but most will not be difficult to overcome. First of all consumers will still demand these systems in their cars so regulations can only limit the types of use but are unlikely to outlaw it completely. Furthermore, many infotainment systems already rely on voice-activation for most services, a technology that decreases driver distraction significantly. There are also possibilities of integrating active safety features such as driver monitoring with in-vehicle connectivity, this will allow manufacturers to actually improve safety through the use of infotainment and telematics.

Despite these aspects of concern, the infotainment technologies market will experience growth. Global demand will continue to grow with economic development and improved wireless infrastructure. Carmakers, aftermarket suppliers and technology companies will need to respond to this increasing demand by continuous innovation. They will also need to address the difference in product development cycle between vehicles and consumer technology. The automotive sector is used to moving relatively slowly, something that will have to change as modern technology is increasingly introduced into the car.

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Tech Tech Mahindra

Tech Mahindra (formerly Tech Mahindra) is an Indian supplier of infotainment and telematics systems. The company is part of the Mahindra Mahindra conglomerate which also has a strong position in the Indian vehicle market. Tech Mahindra has a strong presence in a large number of Indian and global markets, its experience from different sectors, like telecoms, will be useful in expanding its position in the automotive telematics market.

The company's current focus in the automotive infotainment technologies market is to invest heavily on NMACS (Networking, Mobility, Analytics, Cloud and Security) which is bound to transform the consumer and business landscape in the future. The company is working on enhancing and delivering end-to-end connected vehicle solutions. Integration of analytics support to the service delivery platform, eCall and back-end infrastructure for incident location detection for shorter turn around time and integration of real time content to the vehicle's backbone will be of prime importance.

Visiongain spoke to Karthikeyan Natarajan, Senior VP and Head of Integrated Engineering Services, and we are grateful for his contribution.

Airbiquity's Role in the Automotive Infotainment Technologies Market

Airbiquity is a software company that provides the connected vehicle infrastructure for more than sixteen million vehicles worldwide. Their platform brand, Choreo, provides services and connectivity for large players in the automotive infotainment technologies market such as Ford, Nissan, Bosch, Motorola, BMW and GM's OnStar. Airbiquity has a strong focus on integrating mobile devices and cloud storage into vehicles. The company sees this as the most reliable and cost-efficient way to get wireless connectivity into the vehicle. The Choreo platform is also strongly focused on creating OEM value from connected vehicles. This value comes primarily from remote diagnostics where the vehicle itself provides feedback to the manufacturer.

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