

The market and technical trends for Smart Key systems in Europe



Smart key technology has been available on luxury vehicles in Europe since the late 1990s. Despite its introduction on a wider range of vehicle segments since then, lack of customer awareness of both the availability and the benefits of the technology has resulted in lower market penetration and customer take up than expected.

SBD's report *The market and technical trends for Smart Key systems in Europe* provides essential information on the issues that will influence the future development of smart key systems. Additionally, for the first time, the report includes a top level summary of the results of SBD's recent end customer survey, providing an insight into the real needs of the customer.

This report will help you to:

- Understand the **market and technical issues** influencing smart key development in Europe
- Identify the main obstacles to **greater adoption**
- Design **improved smart key systems** that meet market demands
- Gain insight into customers needs to help you plan how to **stimulate customer interest** and increase take up of smart key technology

Who should buy this report?

Drawing upon SBD's unparalleled expertise on smart key systems, this report provides **vehicle manufacturers, suppliers and product planners** with the technical, market and design information they need to develop successful smart key systems for the European market.

The market and technical trends for Smart Key systems in Europe forms part of SBD's "World Class" Smart Key Solution Series.



For additional information and price enquiries, please contact Juanita Appleby by e-mailing jappleby@sbd.co.uk.

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Insight into the future of Smart Keys

Smart key systems have been available in Europe since 1999, when they first started to appear on luxury vehicles. Since that time they have been rolled out on a wide range of vehicles and they are now available on a total of 77 different models from 23 manufacturer brands. However, smart key fitment rates still remain relatively low.

Most of the luxury vehicle manufacturers fit smart key systems as standard on all or part of their model range, with the exception of **Mercedes** and **BMW** who offer it as a cost option on virtually all models. In the mid and low segments it is the Japanese manufacturers who fit systems as standard, with **Mazda, Mitsubishi, Nissan, Suzuki, Subaru** and **Toyota** all fitting systems as standard on high grades of several models. Smart key fitment in Japan is higher than in Europe and these manufacturers are able to take advantage of using common technology between Japan and Europe.

The challenge for vehicle manufacturers is to predict how the market for smart key systems will develop in Europe so that they have effective solutions available when the market is ready for wider adoption.

In 2007, SBD estimates the fitment rates to be an *average* of around 5% in the main European markets of France, Germany, Italy, & the UK. However, due to the increased availability of systems on a wide range of models (especially the increase in standard fit on certain grades) and the bundling of smart key systems as standard on many high grade models, SBD expects that the fitment rate will increase over the next 3 to 4 years, almost doubling by 2010.

However, to ensure that the smart key system is perceived as a value added feature, the vehicle manufacturer must be careful that the smart key system does not present any new areas of customer concern that were not previously present.

SBD have benchmarked a wide range of systems from different manufacturers against customer convenience, system performance and vehicle security. There are a number of issues that need to be addressed during the design stage to produce a convenient and secure system that meets customer expectations and market requirements.



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About the report author



Graeme Acott is a key member of SBD's security team, with expertise in vehicle Smart Key systems. After graduating from Stafford University in 1990 with a degree in Electrical & Electronic engineering, Graeme gained experience in electronic systems for a Tier 1 supplier. He also worked for a vehicle manufacturer gaining detailed experience of in the design of electronic security systems before joining SBD in 2005.

Think Smart Keys - Think SBD

This report forms part of SBD's "World Class" Smart Key Solution Series. Other related smart key activity includes:

- Individual vehicle benchmarking reports
- End customer survey
- Bespoke Smart Key workshops

For more information about how we can support your Smart Key needs, please contact rogerwilson@sbd.co.uk.

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