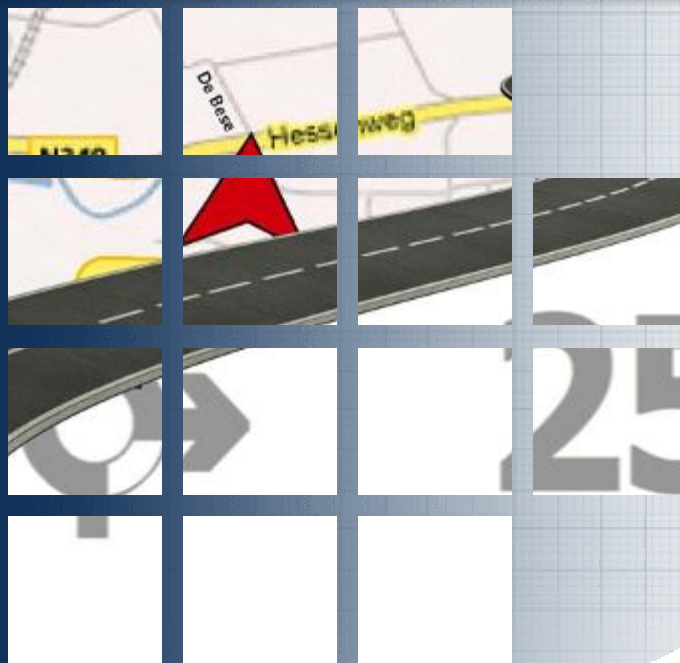


## Ensure a future with connected navigation services



### The main trends and business models for the future of the navigation market

As the automotive and navigation industry continues a “try-anything” approach to its systems and services, it has become increasingly difficult to differentiate between short-term fashion trends and long-term sustainable strategies.

In its latest navigation research, SBD analyses these approaches and identifies which are most likely to succeed in improving the navigation experience for the driver. This provides the industry with crucial knowledge to prioritise future designs, ensure consumer satisfaction and gain competitive information.



The Navigation research stream includes the following four deliverables:

- **Market trends report** - navigation for the “app” generation
- **Technical trends report** - an end-to-end analysis of connected navigation services
- **Sales forecasts** - 5 year sales forecast for OE navigation system sales by manufacturer, supplier and geographic criteria
- **Feature database** - detailed benchmarking tool on the business models and connected services for OE, PND and Smartphone navigation systems

SBD's Navigation research stream provides an end-to-end analysis of the evolving navigation market across Europe addressing the rapidly growing interest in connected services within the PND and Smartphone market and its potential impact on the future for in-car navigation systems.

For additional information please email [jappleby@sbd.co.uk](mailto:jappleby@sbd.co.uk) or telephone Juanita on +44 (0) 1908 305101 and she will be happy to deal with your enquiry.



# »» The future for the navigation market...



## Market trends report - Navigation for the “app” generation (Ref: 2411)

The navigation industry has undergone dramatic changes particularly with the adoption of Smartphone navigation from mainstream consumers, or what SBD deems as the “app” generation. This report analyses the costs and popularity of the Smartphone navigation market and how that will impact on established portable and embedded systems.

- **The navigation landscape**  
An overview of the OE embedded and PND markets before introducing the key changes in the Smartphone navigation industry.
- **Dawn of the navigation app era**  
The story of how software suppliers and PND manufacturers have introduced navigation applications for Smartphones.
- **Meeting the demands of the app generation in the car**  
Understanding how changes in user attitudes will affect future navigation devices in the car.



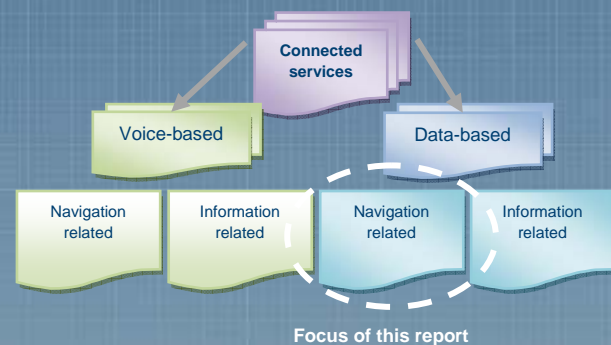
With the integration of GPS modules into mobile phones and the introduction of application (app) stores, consumer attitude towards navigation is changing. The number of navigation apps is growing quickly and consumers now have the freedom to purchase and download the app (software) of their choice to their existing Smartphones.



## Technical trends report - An end-to-end analysis of connected navigation services (Ref: 2412)

The automotive industry is actively developing a range of connected services for embedded navigation systems in an effort to remain competitive with PNDs and Smartphone navigation systems. However, vehicle manufacturers face a range of inter-related decisions on the design of their in-car system, the architecture of the off-board servers and their business model. This report examines the potential solutions, identifies the benefits and limitations of each approach and provides SBD’s view of the future.

- **Defining connected navigation**  
Categorising and identifying the various elements of the service chain.
- **In-car architectures**  
Explaining the main Service Access Methods and communication links with benefits and limitations of each.
- **Content generation and business models**  
An overview of the server architecture and potential business models that vehicle manufacturers and service providers can adopt.



Navigation-related applications based on a data-connection are the most practical solution that can be applied to both OE embedded and PND markets. This report focuses on the two use-cases that are expected to become the most widely implemented: POI search and destination send-to-device from a PC.

# »» ...know what tomorrow brings

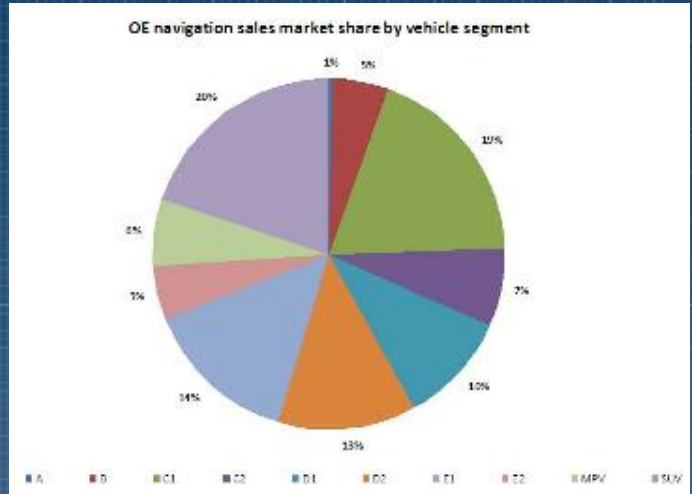


## Sales Forecasts (Ref: 2413)

The sales forecasts help determine growth over the next five years for the navigation market with additional information on embedded navigation systems such as the variations between low-cost and high-end functionality.

These forecasts answer the following key questions:

- What market growth can be expected for each of the navigation device types?
- Has market growth for PND systems peaked and when will it be overtaken by Smartphone navigation?
- When will OE embedded systems experience the same level of sales as it did 2008?



## Feature Database (Ref: 2414)

This database is an easy-to-use benchmarking tool covering the features and services being offered by OE, PND and Smartphone navigation systems. In addition to connected services, the database also includes enhanced map features on PNDs and the different business models used for Smartphone navigation.

This database contains the follow features:

- Feature fitment and connected service availability for OE navigation systems.
- Enhanced map and connected service features as well as content and software upgrades for portable navigation devices.
- Business models and unique services for Smartphone navigation-enabled devices.
- Photographs and screenshots to give a better understanding of systems and features.
- System functionality for 25 leading connected PNDs and Smartphone providers.

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- Navigation Technical Trends Report - €1400**
- Navigation Sales Forecast - €1000**
- Navigation Feature Database - €1000**

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When you purchase the entire Navigation research stream, SBD gives you the added benefit of a FREE day of consultancy time with our Telematics experts. This means that you can make full use of our independent expertise and knowledge – ideal for securing additional competitive advantage.



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(includes Market Trends, Technical Trends, Sales Forecast and Feature Database)



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**Fax:** +44(0)1908 305 106

**Email:** [jappleby@sbd.co.uk](mailto:jappleby@sbd.co.uk)

**Phone SBD:** +44 (0)1908 305 101