



TABLE OF CONTENTS

- Introduction
- Bird's Eye View
- Executive Summary
- The Basics
- What's New?
- Analysis
- Summary Tables
- Ecosystem
- Future Outlook
- Next Steps

RELATED SBD REPORTS

526 – Connected Services Guide

This set of reports provides detailed descriptions and comparisons of services, technologies, key suppliers & partners, business models, architectures, availabilities of services per model and country.

Countries Editions are: Canada, Brazil, Russia, Indonesia, Thailand, Malaysia, South Korea, Japan, Australia

#531



Connected
Car

Automotive App Guide

The automotive industry is experiencing a shift that will gradually see vehicles defined more by the software they utilize and integrate than the hardware they are built on. As such, the significance of in-vehicle apps for both the industry and the overall user experience is increasing. These apps, developed by OEMs and third-party developers, work to offer consumers the functionality and convenience experienced in consumer electronics.

To make sense of the automotive app market for OEMs and developers, SBD has produced the Automotive App Guide. The guide works to understand the automotive app landscape by providing insight into the latest trends and activities from key players in different regions. It takes a deep dive into the in-vehicle app ecosystem, profiling and comparing the apps offered from a broad selection of legacy OEMs and new players.

The guide is updated bi-annually with dedicated versions for Europe, China, and North America to help OEMs and developers stay on top of trends and up to date with this rapidly evolving landscape. The guide's Apps to Consider section includes recommendations from SBD's UX experts for apps that few or no OEMs are offering today but could see success in the future.

COVERAGE



FREQUENCY



PUBLICATION FORMAT



PAGES



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Key questions answered

- > Which OEMs have the most competitive connected car services/apps offering and what are they planning next?
- > How is the end customer sentiment on the implementation analysis of user reviews?
- > What are the different ways in which apps are developed by OEMs?
- > What are the main use cases to cover?

This research supports



PRODUCT PLANNERS



C-SUITE



MARKETING



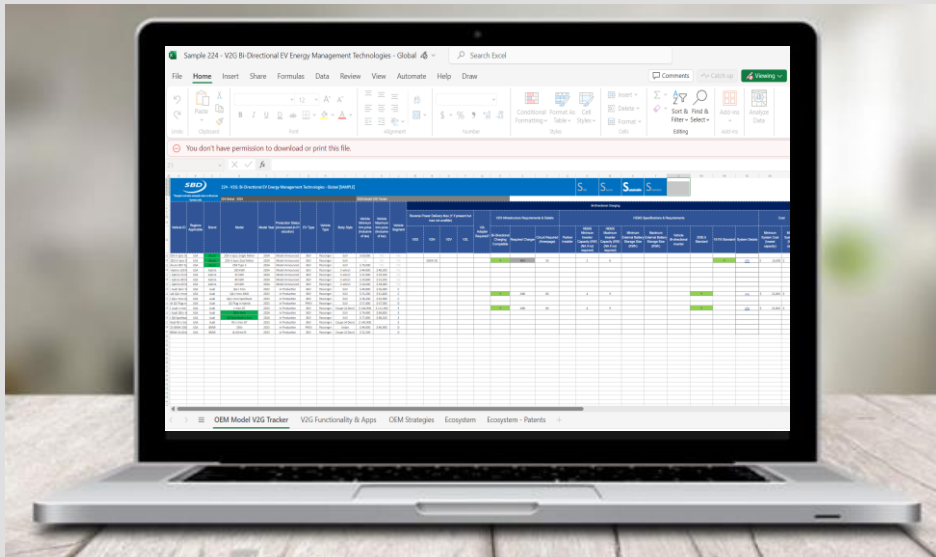
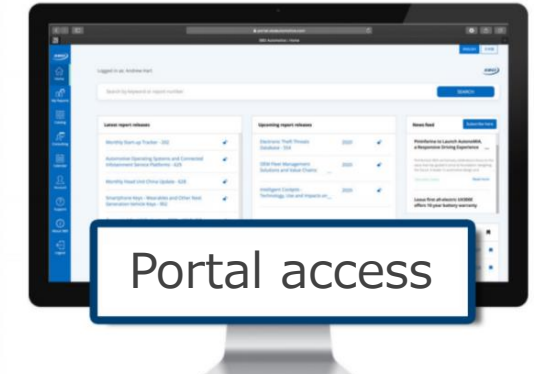
ENGINEERING

Do I have access?

100+ Reports published per year

50k+ Slides of insights, forecasts & data

4,000+ # of auto professionals who access our reports



View Excel Data Sheet Sample

Automotive App Guide

For an in-depth brand/model-level app data, including features and ratings/reviews and tools allowing users to build own queries

>53,000 datapoints

39 OEMs, 200+ unique application details

Smartphone duplication, Ranking and Ecosystem, etc.

[Click for Sample](#)





[Request price](#)



531 Automotive App Guide

531 – Automotive App Guide - Europe

<u>Introduction »</u>	4	<ul style="list-style-type: none"> ▪ OEM vs 3rd Party apps 	
<u>Bird's Eye View »</u>	7	<ul style="list-style-type: none"> ▪ Third Party Apps 	
<u>Executive Summary »</u>	16	<ul style="list-style-type: none"> ▪ Explore 	
<u>The Basics »</u>	23		
<u>What's New? »</u>	30		
<ul style="list-style-type: none"> ▪ Newly launched OEM-branded apps/services ▪ Notable Announcements ▪ Partnerships & Acquisitions ▪ Case Study 			
<u>Analysis »</u>	36	<u>Summary Tables »</u>	51
<ul style="list-style-type: none"> ▪ Consolidation of Apps ▪ Use case availability ▪ OEM App Use-Case Distribution ▪ Built-In Apps ▪ Remote control OEM apps ▪ Halo OEM apps ▪ App ratings vs reviews ▪ App Growth ▪ Focus on app development 		<ul style="list-style-type: none"> ▪ Understanding OEM group ▪ BMW Group ▪ BYD Group ▪ Ford Motor Company ▪ Honda Motor Company ▪ Hyundai Motor Company ▪ Isuzu Motors Limited ▪ Lucid Group ▪ Mazda Motors ▪ Mercedes-Benz Group ▪ Mitsubishi Motors Corporation ▪ NIO ▪ Nissan Motor Corporation ▪ Renault Group ▪ SAIC Motor ▪ Stellantis ▪ Subaru Corporation 	
		<ul style="list-style-type: none"> ▪ Suzuki Motor Corporation ▪ Tata Motors Group ▪ Tesla Motors ▪ Toyota Motor Corporation ▪ Volkswagen Group ▪ Zhejiang Geely Holding Group ▪ Explore 	
		<u>Ecosystem »</u>	79
		<u>Future Outlook »</u>	84
		<u>Next Steps »</u>	91
		<u>Contact us »</u>	98



Introduction

Introduction

Vehicles have moved beyond being a mode of transportation into a source of convenience and entertainment both inside and outside the vehicle. **Consumer apps** have been a part of passenger vehicles for over a decade; now expanding **across multiple OEMs** in various forms depending on the **future of Safe, Secure, Sustainable, and Seamless mobility** and Automaker strategy.

In today's rapidly advancing connected car industry, staying informed about the latest developments is both crucial and complex.

SBD's 531 – Automotive App Guide provides a landscape of app integrations within automotive, with data-driven insights into the various App offerings by OEMs. The report looks at **FOUR key benefits of Apps for automakers**:



What are the key findings of this report?

- Which OEMs have the most competitive connected car services/apps offering and what are they planning next?
- How apps are developed by OEMs: embedded, for smartphone integration within the car or use on smartphones whilst outside of the car?
- What are the main use cases emerging apps cover?
- How is the end customer sentiment on the implementation analysis of user reviews?
- How are OEMs improving smartphone companion apps?

Section	Content
Bird's Eye View	An overview of the key findings from SBD's view of what's important in the Automotive App industry.
Executive Summary	A high-level overview of the Automotive App industry across the regions (US, EU, China)
The Basics	Definition of all App-related terms covered throughout this report.
What's New?	Section focusing on new models launched, notable announcements, partnerships and acquisitions, and trends in the Automotive App industry.
Analysis	In-depth information on the trends and strategies used by automakers for OEM built apps and third-party apps
Summary Tables	The Market Summary section provides the market share of automotive app use cases under different categories. The section also highlights ratings and reviews of each OEM groups.
Ecosystem	Understanding the suppliers, their offerings, and their contribution to the automotive app ecosystem.
Future Outlook	Four personas that drive the OEMs going forward with new development, innovation, and partnerships.
Next Steps	Can SBD help you with any unanswered questions?

We Listened and Invested In Our Report to Align to Your Goals



You Said...

"I sometimes struggle to relate conclusions from research reports to the Outcomes and KPIs that we are working towards..."

"I would like to see what has recently changed within a forecast or domain to help decide if any changes to strategy need to be made..."

"I want to know where we stand 'head-to-head' against the competition on major industry trends..."

"I can find it difficult to take actionable next steps on Guides without assessing the future direction of the industry..."

"It would be helpful to identify disruptive companies and start-ups to keep an eye for partnerships in the future..."

"I would like the topics to be more 'forward looking' to help with future planning and take advantage of enabling technologies."



We Did...

Added **BIRDS-EYE VIEW** chapter with a high-level overview of all our Automotive app reports.

Enhanced **CROSS-REFERENCING** with insights from our Connected Services Guide.

Introduced **FUTURE OUTLOOK** chapter with motivations such as brand loyalty, and its drivers and barriers over time.

More **DATA-DRIVEN ANALYSIS** through our Summary Table, Analysis, and Executive Summary.

Created an **Automotive App OEM RANKING** and an **ECOSYSTEM** chapter with offering, acquisition, and patent insights for key non-OEM stakeholders.

Example slides from the report

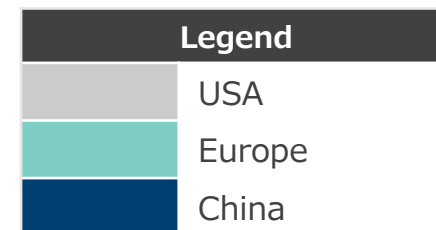
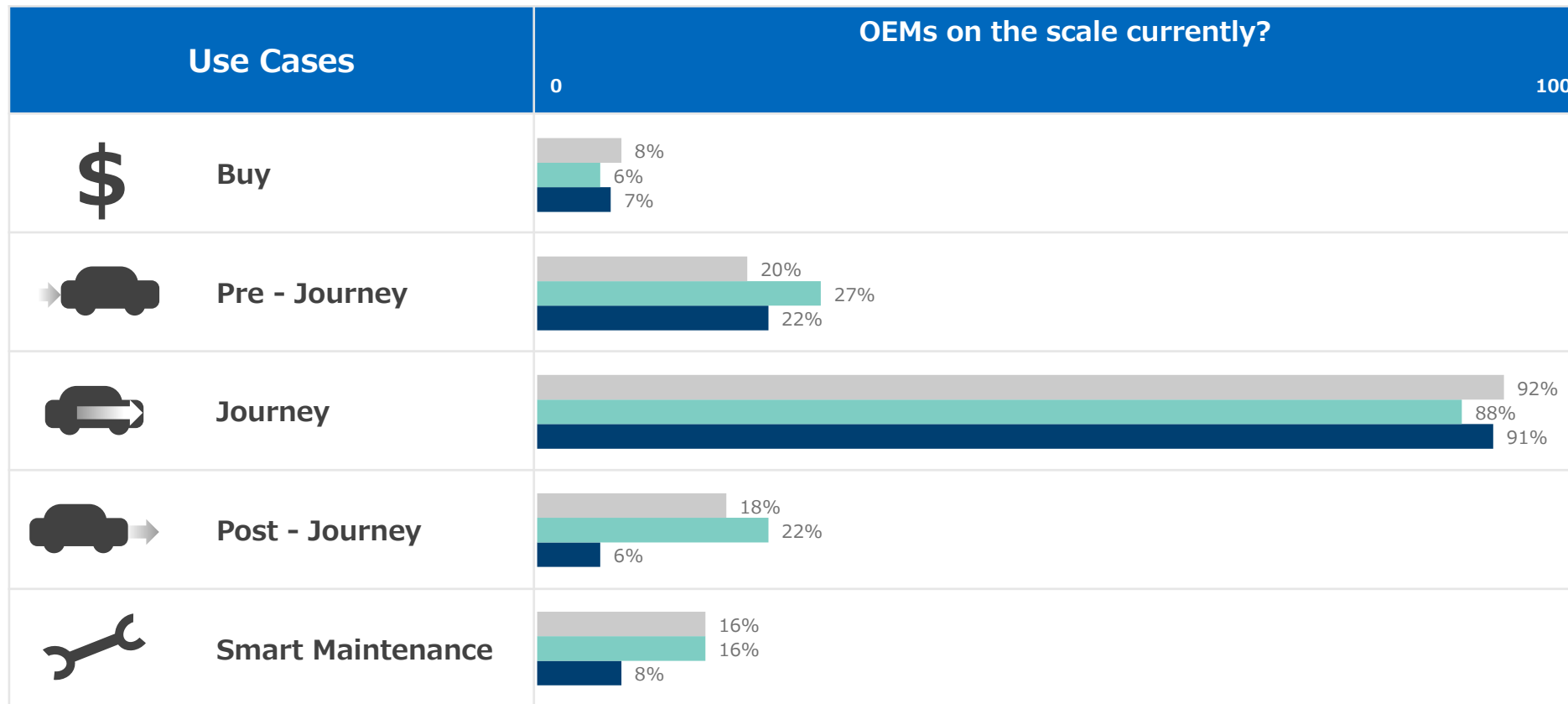


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Journey use cases is major availability in the automotive apps




The chart shows the availability rate of each use case by OEM brands (available) across the regions



Automotive App Guide

The guide helps us understand the automotive app landscape by providing insight into the latest trends and activities from key players in different regions.

[Learn more](#) 

Popular sub-categories						
	<ul style="list-style-type: none">• Internet-based entertainment• Find my car• Current offers• Dealer locator• Door lock / unlock			<ul style="list-style-type: none">• Current offers• Find my car• Travel information• Driving behavior analysis• Schedule a service		
	<ul style="list-style-type: none">• Explore & compare models• Destination send-to-car• Internet-based entertainment• Door lock / unlock• Schedule a service					



'Seamless' & 'Personalized' are key factors for In-vehicle app experience

Approach 1 (Adopted Expertise)



Mercedes Benz partnered with Forvia to integrate Aptoid **app solution**

Approach 2 (In-house Expertise)



GM's Ultifi platform, enabling authorized third-party developers to innovate

Approach 3 (Hybrid approach)



Ford Sync AppLink acts as a facilitator between in-car systems and the smartphone app

Example

Technology

SDK

API

App Store

SDK

API

App Store

SDK

API

App Store

App Development

Native

Third-Party

Native

Third-Party

Native

Third-Party

Ease of Access

With AA-CP

Without AA-CP

With AA-CP

Without AA-CP

With AA-CP

Without AA-CP

User Interface

Familiar

New

Familiar

New

Familiar

New

App Authority

Vehicle Brand

App developer

Vehicle Brand

App developer

Vehicle Brand

App developer

App Updates (OTA)

Low

Medium

High

Low

Medium

High

Low

Medium

High

Experience

Functional

Seamless

Personalized

Functional

Seamless

Personalized

Functional

Seamless

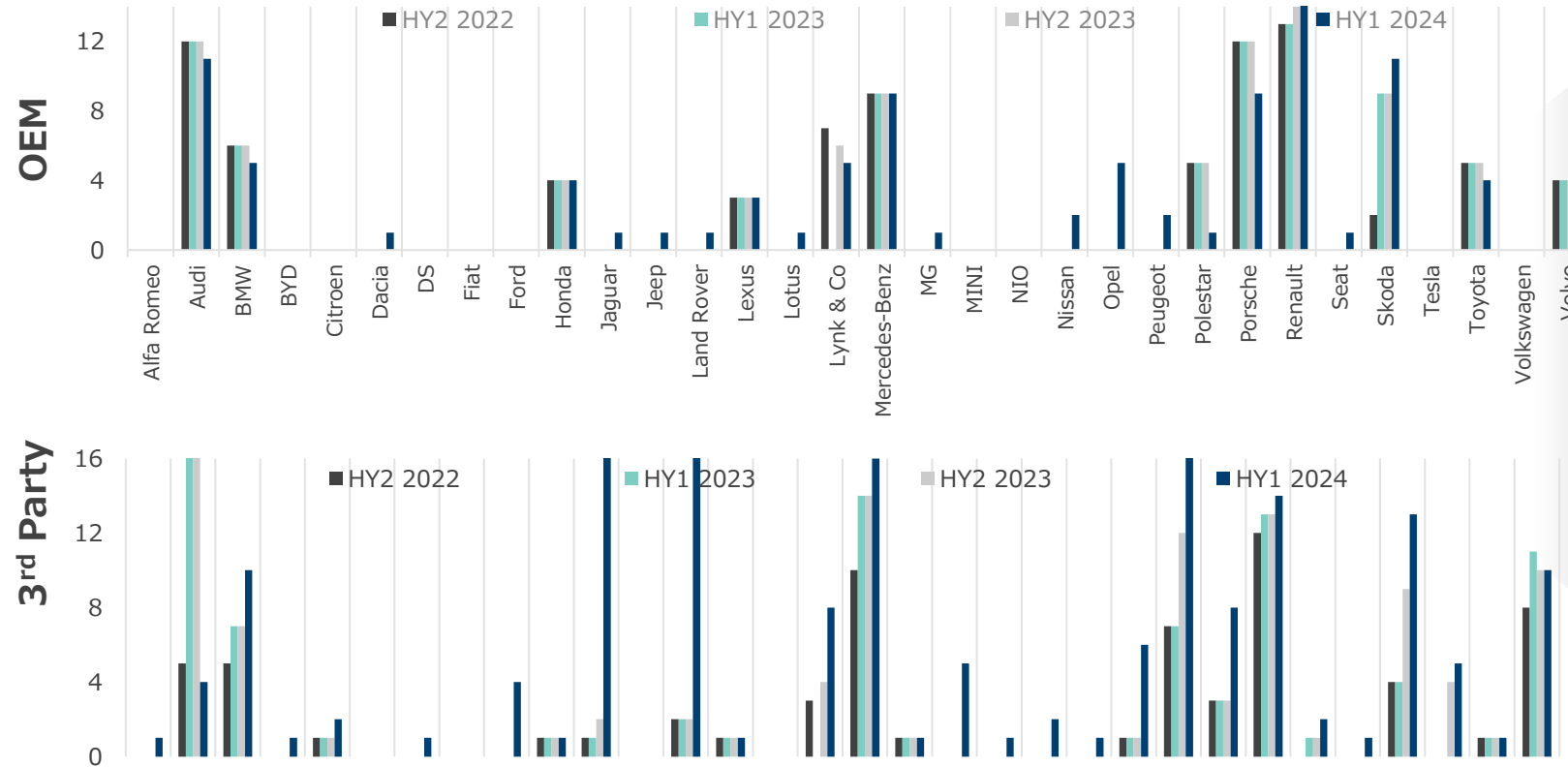
Personalized

SBD's Viewpoint

- In-vehicle app integrations have been around for decades, the technology however, is only starting to get seamlessly with newer partnerships for app platforms.
- The SDK Ford AppLink solution has long been an inconvenience to use in conjunction with Android Auto/ CarPlay, in terms of parallel inaccessibility.
- The latest trend of 'In-vehicle app stores' addresses concerns like this, providing consumers an ease to access with seamless and personalised approach.



Unlike US, OEMs in Europe emphasize greatly on 'OEM apps'



Note: The above chart represents the variation in app count across 3rd party & OEM-developed apps over the years.

Key highlights

- Premium Brands such as **Audi, BMW, Mercedes, Porsche & Volvo** strongly rely on 3rd party apps making it accessible on HU to enhance 'journey' experience, while also providing multiple OEM apps to address 'pre-journey' & 'post-journey' convenience.
- Meanwhile, only select volume OEMs count upon OEM-based apps/ app store **looping revenue in-house, major player being Renault**, in addition to a few other in-line such as Skoda, Toyota, Honda.



Mercedes-Benz: Faurecia Aptitude Automotive integrates with MBUX infotainment to offer over 200+ apps in a multi-year agreement to supporting use-cases such as navigation, traffic, streaming, payment, parking & charging stations with the latest add-on of TikTok in-car.



Volkswagen Group: The voluminous brand of Volkswagen rolls-out its 'In-house' app store across all its brands through Cariad, in partnership with Harman & Faurecia; showcasing a unified in-car software platform across the brand.

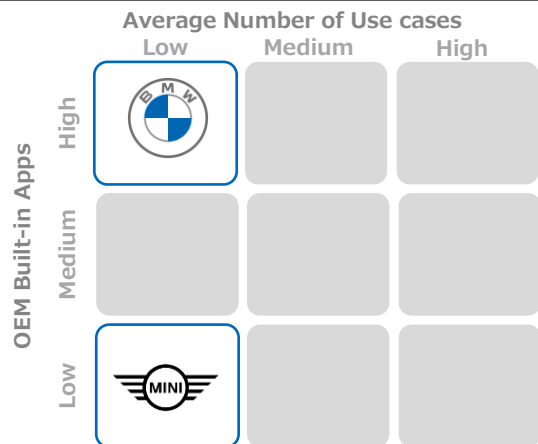


Renault: Renault strongly relies on OEM & 3rd party apps with native OEM developed R-Link platform. Renault is further expected to launch V2G in Europe supported by in-house brand 'Mobilize' to develop a smart charging app, regulating energy management.

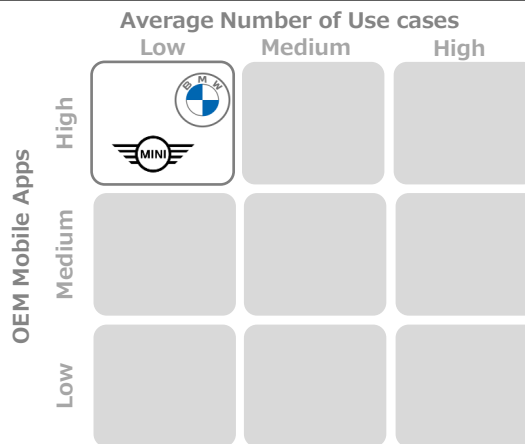


BMW Group

Built-In Apps



Smartphone Apps



Overall Group Apps rating



Legends

Built-in	Smartphone	Free
----------	------------	------

Reviews



The MyBMW app is more than helpful. BMW is great!



No ability to control windows from within the application, no notification if alarm is triggered, would be nice to have lock screen widgets showing charging information.

Use case availability

Brand	Buy		Pre-Journey		Journey		Post-Journey		Smart Maintenance	
BMW	-	4%	-	17%	94%	62%	6%	4%	-	13%
MINI	-	-	-	18%	100%	66%	-	3%	-	13%

Paid Apps

Built-in Apps

Smartphone Apps

	Built-in Apps		Smartphone Apps	
Initial Price	0%	100%	0%	100%
Subscription	35%	65%	8%	92%
In-App Purchase	40%	60%	36%	64%

Key Highlights

- The **latest MINI app update has introduced** many new features like personalized trip insights, convenient window control with Digital Key Plus, detailed charging station data, monthly charging statistics, visible alarm activation, and improved parking garage selection filters. It is also **compatible with Apple Watch**.
- BMW Digital Premium** is optionally available for the models with BMW Operating System 9 and offers a selection of third-party apps in the categories of music & audio, news & magazines, and gaming for the infotainment system.
- Customers driving compact models with **BMW Operating System 9 have also been able to access the Video App with BMW Digital Premium**. As announced, these will be followed by further models over the course of 2024, such as the BMW X2 and all models in the new MINI family.

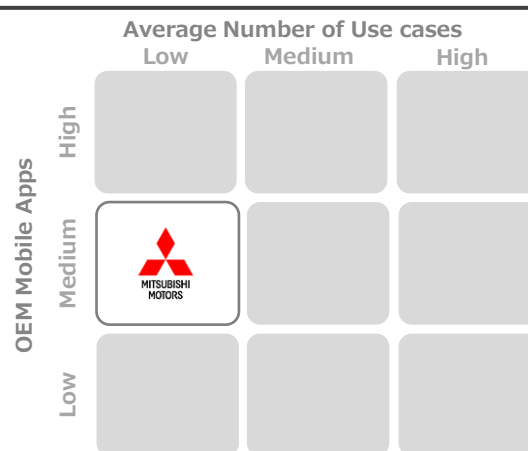


Mitsubishi Motors Corporation

Built-In Apps



Smartphone Apps



Overall Group Apps rating



Legends

Built-in	Smartphone	Free
----------	------------	------

Reviews



Lots of information at a glance and a great way to check car vitals.



An update to provide users the ability to search specific content. It would be helpful if there were manuals also in this app.

Use case availability

Brand	Buy		Pre-Journey		Journey		Post-Journey		Smart Maintenance	
Mitsubishi	-	3%	-	33%	-	53%	-	13%	-	-

Paid Apps

Built-in Apps

Smartphone Apps

Initial Price	No Built-in apps available for Mitsubishi	0%	100%
Subscription		0%	100%
In-App Purchase		0%	100%

Key Highlights

- Mitsubishi** does not offer any built-in apps. The minimum number of smartphone apps offered by Mitsubishi covers use cases of all the categories, except Smart Maintenance.
- Mitsubishi **smartphone apps are 38% smartwatch** compatible.



Prioritize Innovation, Customization & Quality to gain customer acceptance

Vehicle 4.0 Benefit 2-Brand loyalty / extended brand experience

Extend experience beyond physical car with a familiar and convenient UX for customers accustomed to app stores on smartphones

2024

2025

2026

2027

2028



Early adopter/Innovator

Disruptor
Premium Brands
Chinese new entrant



Develop data analytics and insight repository incorporating customer info, vehicle details, and usage patterns etc.



More loyalty programs, offers on services parts, coupons. To encourage customers to be loyal to the brand



Develop and provide cross-platform compatibility

Proactive service reminders
seamless device integration

Cautious observer – (Mass-market value-driven OEMs)

Monitoring industry developments and likely to outsource development.



Curating quality over quantity, ensuring resources are tasked with only launching quality, validated, and value-centric apps



Offer premium features for a free trial period to increase uptake, quality of execution will ensure retention.

Incorporating premium brand experience



Create a simple user-friendly interface, easy to navigate app



Creating an alert on maintenance, timely remainder could help build relationship with brand



Have a designated customer center department to resolve queries

Convenient and user-friendly ownership experience

Slow adopters - Hesitant to adopt new technologies such as in-vehicle app stores. Generally, behind the curve on most aspects of vehicle development.



Outcome



Barriers



Solutions



Request the price



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Contact SBD Automotive

Do you have any questions?

If you have any questions or feedback about this research report or SBD Automotive's consulting services, you can email us at info@sbdautomotive.com or discuss with your local account manager below.



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