



# Infotainment Report 2011

This report assesses key trends in infotainment, and considers many of the market drivers and market barriers for the various participants in the infotainment eco-system. The report reviews the activities of many industry forums active in developing standards for infotainment hardware and software.

The report also includes a comprehensive review of infotainment sub-systems and technology, including satellite radio, DAB, HR radio, internet radio, Bluetooth, navigation, telematics, voice recognition and smartphone integration strategies. Furthermore, the report analyses the latest developments of the major suppliers in this sector.

## **Background to this Research**

While some OEMs are responding to economic pressures with a range of “value” vehicles, promoting fuel efficiency and safety, others are focusing on product innovation and differentiation inside the vehicle in an attempt to win customers hearts as well as their heads, and – consequently – a larger share of their wallet.

Nowhere is this product innovation more apparent than in the area of infotainment systems. Infotainment is considered by most OEMs as important to the brand and often a key differentiator in the car-buying decision, with a customer appetite for functionality driven not by the brand but by experiences with consumer electronics.

## **Table of contents**

### **EXECUTIVE SUMMARY**

### **INTRODUCTION**

Infotainment trends to watch 2011-12

Human Machine Interface:

Connectivity:

Services/Apps:

Content:

The Cloud

Software in the car

## Industry Challenges

Driver Distraction  
Product Development Cycles  
In-vehicle integration challenges  
Opportunities for the Aftermarket  
Regional differences

## **SMARTPHONES IN THE VEHICLE**

Connected vehicle applications

1. Embedded Telematics Solutions
2. Tethered Connectivity Solutions
3. Remote Terminal Solutions
4. Remote Skin Approach

The New Value Chain - Automotive Apps Store

## **IN-VEHICLE AUDIO**

Satellite Radio  
HD Radio  
Digital Audio Broadcasting (DAB)  
Internet Radio in the Car  
Navigation Systems  
Bluetooth  
Example smartphone A2DP application – Ford Sync  
In-Vehicle Voice Control  
Architecture

## **INFOTAINMENT INTERFACE STANDARDISATION ACTIVITIES**

AMI-C  
AUTOSAR  
Car Connectivity Consortium  
CE4A - Consumer Electronics for Automotive  
GENIVI  
GENIVI Reference Platform  
IEEE1394 Auto  
JASPAR  
MOST Cooperation

## **INFOTAINMENT SUPPLIER ACTIVITY**

Alpine Electronics

Audiovox

Autonet Mobile

Blaupunkt

Bosch

BOSE

Clarion

Continental

Multi Media Platform

Continental Case Study: The Telematics App Store:

Car View

Mobile View

Partner View

Service Configuration and Certification

Applications and Services:

Eco-System Partners

Delphi Corporation

Denso

Toyota Entune

iPhone Integration and Drowsy Driver System

Microsoft Collaboration

Dual View Screen Technology

Blue Harmony

Elektrobit

Audi

Fiat's Blue&Me

Ford SYNC

Delphi / Audi

Harman

Mercedes

Volkswagen

BMW

Ferrari

INTEL

Johnson Controls

JVC

Kenwood

Magneti Marelli

BMW Entry Level Platform

Fiat's Blue&Me

Overview of PSAs RTx Series

Other Areas:

Microsoft

Fiat Blue&Me

Ford SYNC

MyFord Touch

Kia UVO

Panasonic

Parrot

Peiker Acustic

Pioneer

SONY

VISTEON

Current Products

### **List of Figures**

Figure 1: Infotainment feature availability (Source: iSuppli)

Figure 2: Generic connected vehicle application groups

Figure 3: Enhancing embedded solutions by bringing in off-board functionality

Figure 4: Augmenting Mercedes Head Unit with smartphone apps – cradle solution

Figure 5: Nokia Terminal Mode

Figure 6: Range of options for delivering apps to the car

Figure 7: Range of typical automotive apps

Figure 8: Distribution of Sirius vs XM by OEM

Figure 9: Pioneer DEH-P7200-HD Radio

Figure 10: Sony CDX-GT700HD

Figure 11: HD Radio Converter Boxes from JVC and Kenwood

Figure 12: Ford Sony DAB radio in the Ford Grand C-MAX

Figure 13: Philips CEM3000B digital radio  
Figure 14: Sony Cdx-Dab6650 DAB radio with MP3, CD and FM stations  
Figure 15: Bosch RNS Navigation System in 1997 Ford Mondeo  
Figure 16: Renault TomTom Carminat  
Figure 17: Ford MyFord Touch Navigation  
Figure 18: Entune Speech Recognition  
Figure 19: GENIVI Platform Vision (courtesy GENIVI)  
Figure 20: Potential applications for IEEE1394 Auto  
Figure 21: MOST interfaces to consumer electronics

Figure 1: Alpine MRX-V60 and PXA-H800  
Figure 2: Alpine RUX-C800  
Figure 3: Alpine CDE-123 CD receivers showing different audio modes  
Figure 4: Alpine CDE124-SXM head unit  
Figure 5: Alpine INA-W910  
Figure 6: Audiovox GM OE-styled multimedia & navigation system - OGM1  
Figure 7: Audiovox Universal OE Multimedia & Navigation System  
Figure 8: View from Audiovox rear camera, showing standard, birds eye and corner views  
Figure 9: AudioVox CarLink App  
Figure 10: Audiovox AVDBR1 Blu-ray player  
Figure 11: Audiovox PS2 installation  
Figure 12: Autonet CarFi product  
Figure 13: Blaupunkt New York 800  
Figure 14: Blaupunkt 410 BT Tuner  
Figure 15: Blaupunkt San Francisco 310  
Figure 16: Blaupunkt Atlanta 110  
Figure 17: Bosch RNS 310 for VW  
Figure 18: Nissan Connect system by Bosch  
Figure 19: Bosch Navigation iPhone App  
Figure 20: Bosch Head Unit in Smart fortwo  
Figure 21: Bosch Head Unit in Opel Corsa  
Figure 22: Corsa CD500 Navi  
Figure 23: Jaguar XJ Dual View screen  
Figure 24: BOSE CENTREPOINT system in 2010 Mazda CX-7  
Figure 25: Ferrari Scaglietti 612 head unit  
Figure 26: BOSE Audio in Renault Koleos  
Figure 27: BOSE audio system on Chevrolet Volt  
Figure 28: Clarion NAX-700 (1993)  
Figure 29: Clarion AutoPC (1998)  
Figure 30: Clarion VRX755VD  
Figure 31: Clarion HDD AV Navigation System  
Figure 32: Clarion NX501  
Figure 33: Clarion NZ501  
Figure 34: Clarion CX501  
Figure 35: Clarion NZ501  
Figure 36: CRASVIA NX10  
Figure 37: Smoonavi 710  
Figure 38: Conti Black Panel Centre Stack Concept

Figure 39: Conti Multi Media Platform  
Figure 40: Conti RNS 510 Multimedia System  
Figure 41: Conti Flat Panel Radio  
Figure 42: Continental AUTOLINQ approach  
Figure 43: AutoLinQ concept showing different use conditions  
Figure 44: AutoLinQ head-unit  
Figure 45: AutoLinQ - web-based navigation  
Figure 46: Conti view of OEM App Store  
Figure 47: AutoLinQ customer groupings  
Figure 48: AutoLinQ Sample Apps: Traffic View and Address Book  
Figure 49: Tyre Pressure App  
Figure 50: Delphi Connected Navigation Radio for Audi  
Figure 51: Car-aware flexible smartphone OS  
Figure 52: Delphi s Software Radio (Source: Delphi)  
Figure 53: Delphi s Receiver Roadmap (Source: Delphi)  
Figure 54: Delphi Cockpit Concept  
Figure 55: Delphi Smart Fob with NFC  
Figure 56: Toyota Entune Display  
Figure 57: Denso concept showing iPhone mounted in steering wheel  
Figure 58: Denso Blue Harmony concept  
Figure 59: Toyota Venza - Denso Nav system  
Figure 60: Toyota Lexus Nav System  
Figure 61: DAB Display, developed with Elektrobit s GUIDE  
Figure 62: Audi A5 Gesture Recognition System  
Figure 63: Fiat s Blue&Me implementation showing driver controls and displays  
Figure 64: Ford SYNC device and remote display  
Figure 65: Delphi Navigation solution for Audi A1  
Figure 66: Navigation screens for Audi A1 using Elektrobit Street Director  
Figure 67: Harman infotainment system in Hyundai Equus  
Figure 68: Forward view of Harman augmented reality nav display  
Figure 69: Mercedes E Class showing Harman Kardon system  
Figure 70: BMW X5 Harman Soundsystem  
Figure 71: Ferrari FF cockpit with JBL QuantumLogic system  
Figure 72: Intel IVI Reference Design  
Figure 73: IVI Reference Platform Implementation  
Figure 74: IVI Reference Platform Architecture  
Figure 75: Bluestar TIVI Product in the Hawtai B11  
Figure 76: Johnson Controls VFD (Vacuum Fluorescent Display)  
Figure 77: JCI Connected Centre Stack Display  
Figure 78: JCI Connected Centre Stack  
Figure 79: JVC KW-HDR720 HD Radio with Pandora  
Figure 80: JVC KW-NT50HDT Navigation with Clear Channel Radio  
Figure 81: JVC KD-R520 USB/CD Radio with iPhone interface  
Figure 82: JVC-AVX840  
Figure 83: Arsenal KW-ADV794 Multimedia  
Figure 84: Integrated navigation system manufactured by Kenwood and JVC for the first time (for Japanese consumer markets)  
Figure 85: KIV-700 Digital Media Receiver

Figure 86: Kenwood DNX9980HD Navigation system co-developed with Garmin  
Figure 87: Kenwood KVT-696 Entertainment System with Optional Navigation module.  
Figure 88: Kenwood KDC-X-995 CD 1-DIN Receiver  
Figure 89: Blue&Me - connection of MP3 player in USB slot  
Figure 90: Blue&Me - connection kit for iPod/iPhone  
Figure 92: Blue&Me initiation switch on steering wheel – note the Microsoft logo  
Figure 92: Blue&Me switch array, in vehicle headliner, showing SOS call and Concierge service  
Figure 93: Blue&Me MAP Navigation display, integrated into instrument cluster  
Figure 94: Blue&Me TomTom integrated screen  
Figure 97: Peugeot central console showing RT4  
Figure 97: RT4 control panel  
Figure 97 Main RT4 control screen  
Figure 98: Marelli thirdgeneration Telematics unit for PSA  
Figure 99: Panasonic Uconnect Touch 8.4N  
Figure 100: Uconnect on Dodge Charger  
Figure 101: Fender branded speaker in VW Jetta  
Figure 102: Saab 9-5 Navigation System  
Figure 103: Honda DVD Entertainment System  
Figure 105: Honda Odyssey Rear-seat Entertainment System  
Figure 104: CY-VHD9401N RSE system  
Figure 106: Parrot Gateway Module  
Figure 107: Parrot ASTEROID receiver  
Figure 108: Detachable faceplate on ASTEROID  
Figure 109: Parrot ASTEROID in VW  
Figure 110: Delphi head unit for Audi, including Parrot telephony  
Figure 111: Aha Radio app on Pioneer AVIC series  
Figure 112: Pioneer AVIC-Z130BT  
Figure 113: Pioneer AVIC-X930BT  
Figure 114: Pioneer Smart Cradle for iPhone  
Figure 115: Pioneer App Radio - Image courtesy CrunchGear  
Figure 116: Pioneer MVH Series media receivers  
Figure 117: Sony head unit in Ford Flex  
Figure 118: Sony head unit in Ford C-Max  
Figure 119: Sony Xplod aftermarket infotainment system  
Figure 120: Visteon Integrated Centre Panel  
Figure 121: Visteon Demo Infotainment Platform  
Figure 122: Visteon infotainment platform display  
Figure 123: Visteon DVD/CD Platform  
Figure 124: Visteon Thin Profile Audio  
Figure 125: Visteon Digital Audio Card  
Figure 126: Visteon Innovation Radio  
Figure 127: Visteon Rear-seat USB Module