

Executive Summary

The internet revolution has shown that development of a broad access to telecommunication technologies are central to improve global competitiveness and handle information in a most efficient perspective. Technologies for connected and autonomous vehicles are rapidly improving. The benefits for daily life are clear and widespread, including increased safety, less traffic, reduced environmental impact and more comfort for drivers and passengers. V2X technologies are key enablers for this evolution.

The rising demand for vehicular data, enhanced comfort and entertainment features, stringent safety regulations, growing smartphone and vehicle integration, and the need for improved operational efficiency and profitability also results in the growth of the telematics market.

According to Global System for Mobile Association (GSMA) intelligence, Brazil in particular is seeing a strong 4G growth - from only 10% of connections at the beginning of 2016, take-up has grown to 34% and will reach 57% by 2020 – the first country in the region to reach more than half of total connections on 4G.

Today, there are some great-connected car services available over 4G LTE networks such as telematics, infotainment (passenger entertainment) and remote-control functions to start the car or unlock doors.

Connected autonomous cars will generate an explosive amount of data. Therefore, data transmission volume is expected to grow exponentially in the coming years. Making these huge data transfers more affordable 5G network optimizations will be required.

As the race to introduce autonomous cars picks up, more automakers are introducing more advanced safety, infotainment and semi autonomous features to vehicles. Car tech has graduated from large, in-dash touch screens to technologies that can steer a car down the highway, connect it to smart home devices and even talk back to you.

People love being connected to digital services, the demand continues to grow and the number of services and applications continues to expand. Car buyers are increasingly focusing on tech and efficiency rather than power or torque. More than half of shoppers now say that in-vehicle technology is more important than a car brand, according to a recent Autotrader study. Furthermore, according to Bright Consulting's VEHICLE TECHNOLOGY MONITORING SYSTEM, in 2017, 49% connected vehicles were sold in the country and this number is expected to reach over 55% by the end of 2018.

Independently of the size of the Brazilian market after the last recession and the low recovery for the coming years, buyers driven by the Centennials (Generation Z) will request in their cars the same level of connectivity they see worldwide.

The fast-paced adoption of new technologies, smartphones, and social media is building up a new digital future. With consumer preferences shifting to a digital paradigm, brands are exploring new ways to digitally drive their futures.

Virtual assistants as an interaction channel has become a reality. The release of affordable, voice-enabled devices by tech giants such as Google and Amazon has increased the adoption of virtual assistants significantly. Customer adoption of these globally is expected to reach US\$1.83 billion by 2021, growing at a rate of 29.4% CAGR. This rapid rise presents a new opportunity for brands to speak with their customer in a completely different way.

The current generation of automotive assistants already leverages artificial intelligence, including deep

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