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## Research

### Mobile Electronics Market Update

by Jim Spoonhower, Vice President of market research for SEMA



The mobile electronics market has faced its challenges over the years and continues to grow. During the six years between 1999 and 2005, the mobile electronics market grew 67%, going from \$3.3 billion to nearly \$5.5 billion. Last year, the Fredonia Group forecast that the demand for automotive entertainment systems, which include just about everything we classify as mobile electronics, will reach nearly \$10 billion by 2008.

Mobile electronics is not a new phenomenon. In fact, probably one of the first modifications to early cars was the attachment of an "aftermarket" radio. Today, mobile electronics can be very sophisticated, even works of art.

When it comes to today's mobile electronics in the performance parts and accessories side of the automotive aftermarket, we are talking about a wide range of products such as gaming consoles, mobile satellite TV, navigation systems, satellite radio, amplifiers, CD changers, DVD players, video monitors, head units and, of course, speakers.

If you don't think the market is big, just ask any of the 186 companies that exhibited in the Mobile Electronics section of the SEMA Show. For 2006, this section boasted 57 first-time exhibitors in addition to Show regulars.

The really interesting thing is that the market has shifted from a concentration on sound systems to one that is increasingly about navigation and entertainment systems. In 1999, navigation and entertainment systems accounted for just under 12% of the total mobile electronics retail sales. By 2005, that market share had increased to almost 23%.

Like all other performance parts and accessories, mobile electronics is all about the consumer. The following consumer related information comes from a survey of individuals who subscribe to any one of 21 automotive enthusiast magazines.

Of the nearly 5,000 responses, those that responded indicated they had installed or planned to install mobile electronics in their vehicles. Since these people subscribe to automotive magazines, we would classify them as enthusiasts. Their responses may not be typical of every vehicle owner out there, but they do represent the main consumer base for our industry. In this case, the responses represent enthusiasts who have selected mobile electronics products to modify their car or light truck.

The majority, nearly 67%, of these folks, begin modifying their cars or light trucks within the first two months of ownership. Other modifications are performed over time, which may be a function of the budget of the vehicle owner.

Even though we see navigation and entertainment systems gaining market share, sound systems are still the heart of mobile electronics. The top six mobile electronics items that automotive enthusiasts have installed or plan to install are sound system components. Notice that nearly 35% have or plan to install amplifiers in their vehicles.

Not only did we ask enthusiasts what products they use to modify their vehicles, but we also asked them about their thought process when making a purchase. Specifically, we asked them about the importance of certain factors when they were making their selections.

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