



NSR

NORTHERN SKY RESEARCH

An Analysys Mason Company

Connected Vehicles via Satellite

February 2023

DISCLAIMER

Northern Sky Research LLC, an Analysys Mason company

Whilst we have used reasonable care and skill to prepare this publication, we are not responsible for any errors or omissions, or for the results obtained from the use of this publication. The opinions expressed are those of the authors only. All information is provided “as is”, with no guarantee of completeness or accuracy, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose. In no event will we be liable to you or any third party for any decision made or action taken in reliance on the information, including but not limited to investment decisions, or for any loss (including consequential, special or similar losses), even if advised of the possibility of such losses.

No reference should be made to Northern Sky Research LLC, or Analysys Mason in a regulatory statement or prospectus on the basis of this publication without our prior written consent.

© Analysys Mason Limited and/or its group companies 2023.

Executive Summary**Definitions****1. Global Overview**

1. Regional Picture
2. Factors Impacting Connected Vehicles
3. Largest Drivers for Connected Vehicles
4. In-service Units and ARPU
5. Revenues

2. Connected Cars

1. Connected Car In-service Units and ARPU
2. Connected Car Revenues
3. Connected Car Bottom Line

3. Connected Trains

1. Connected Trains In-service Units and ARPU
2. Connected Trains Revenues
3. Connected Trains Bottom Line

4. Connected Buses

1. Connected Buses In-service Units and ARPU
2. Connected Buses Revenues
3. Connected Buses Bottom Line

5. Connected Trucks

1. Connected Trucks In-service Units and ARPU
2. Connected Trucks Revenues
3. Connected Trucks Bottom Line

6. First Responder Vehicles

1. First Responder Vehicles In-service Units and ARPU
2. First Responder Vehicles Revenues
3. First Responder Vehicles Bottom Line

7. Heavy Equipment

1. Heavy Equipment In-service Units and ARPU
2. Heavy Equipment Revenues
3. Heavy Equipment Bottom Line

Appendix: Methodology

Executive Summary

- **Connected Vehicle Total Retail Revenues by Form Factor, 2032**
- **Connected Vehicle Total In-Service Units by Region**
- **Connected Vehicle Total Retail & Wholesale ARPU**
- **Connected Vehicle Total Retail Revenues by Capacity Type**

1. Global Overview

- In-service unit forecast, 2022 to 2032 (000s)
- Regional Breakdown (Net Growth '22 to '32)
- Retail and Wholesale ARPUs

2. Connected Cars

- Connected Car In-Service Units (000s)
- Regional Breakdown (Net Growth '22 to '32)
- Retail and Wholesale ARPUs
- Connected Car Market Revenues (USD\$M)
- Regional Breakdown (Cumulative '22 to '32)
- Retail Revenues By Capacity

3. Connected Trains

- Connected Train In-Service Units (000s)
- Regional Breakdown (Net Growth '22 to '32)
- Retail and Wholesale ARPUs
- Connected Train Market Revenues (USD\$M)
- Regional Breakdown (Cumulative '22 to '32)
- Retail Revenues By Capacity

4. Connected Buses

- Connected Bus In-Service Units (000s)
- Regional Breakdown (Net Growth '22 to '32)

- Retail and Wholesale ARPUs
- Connected Bus Market Revenues (USD\$M)
- Regional Breakdown (Cumulative '22 to '32)
- Retail Revenues By Capacity

5. Connected Trucks

- Connected Truck In-Service Units (000s)
- Regional Breakdown (Net Growth '22 to '32)
- Retail and Wholesale ARPUs
- Connected Truck Market Revenues (USD\$M)
- Regional Breakdown (Cumulative '22 to '32)
- Retail Revenues By Capacity

6. First Responder Vehicles

- First Responder Vehicles In-Service Units (000s)
- Regional Breakdown (Net Growth '22 to '32)
- Retail and Wholesale ARPUs
- First Responder Vehicles Market Revenues (USD\$M)
- Regional Breakdown (Cumulative '22 to '32)
- Retail Revenues By Capacity

7. Heavy Equipment

- Heavy Equipment In-Service Units (000s)
- Regional Breakdown (Net Growth '22 to '32)
- Retail and Wholesale ARPUs
- Heavy Equipment Market Revenues (USD\$M)
- Regional Breakdown (Cumulative '22 to '32)
- Retail Revenues By Capacity



[@NSR Satcom](#)



NSR on [LinkedIn](#)

Northern Sky Research, an Analysys Mason company
info@nsr.com | www.nsr.com | +1 (617) 674 - 7743