Legacy audio models are misaligned with the lifecycle value SDV can unlock

Legacy Audio Challenges

Current hardware-centric audio strategies limit innovation and do not align with evolving SDV architectures.

Collaboration and Integration Issues

Poor coordination between hardware, software, UX, and suppliers causes inefficiencies, impacting feature prioritization and sourcing decisions, leaving significant lifecycle value on the table.

OEMs — Lack clarity on table-stakes vs. premium content across brands and models, hard to define ROI and lifecycle value, delayed alignment of next-gen audio within broader SDV roadmaps.

Suppliers — Without a strong software-led narrative, suppliers' risk being commoditized as true value becomes invisible to OEMs.

Why take part?

The **Software-Defined Audio Framework** is a structured, future-ready blueprint for delivering right-sized intelligent, adaptive, and personalized audio. Backed by a strategic report and consumer survey data to guide faster, smarter decisions.

OEMS

- Streamlined decisions across hardware, software, and UX for faster product cycles
- Ability to craft distinctive, brand-aligned in-cabin sound experiences
- Clear pathways to differentiate beyond traditional hardware metrics

Suppliers

- Expanded addressable market enabled by transparent capability mapping
- Stronger, more aligned OEM partnerships grounded in shared language and expectations
- Development and integration cycles that align with OEM SDV workflows

The Software-Defined Audio Advantage

- ✓ **Accelerate innovation** and feature development while **reducing BoM and integration costs**
- ✓ **Deliver stronger differentiation** through adaptive, branded audio experiences that hardware alone cannot achieve.
- ✓ **Realize greater lifetime value** through OTA updates, personalization, and FaaS revenue streams

The Software-Defined Audio (SDA) Framework

✓ **Defines tiered, SDV-aligned audio strategies**

Mapping entry, mid, and premium/luxury audio approaches to digital maturity, architectural roadmap and constraints, and lifecycle expectations.

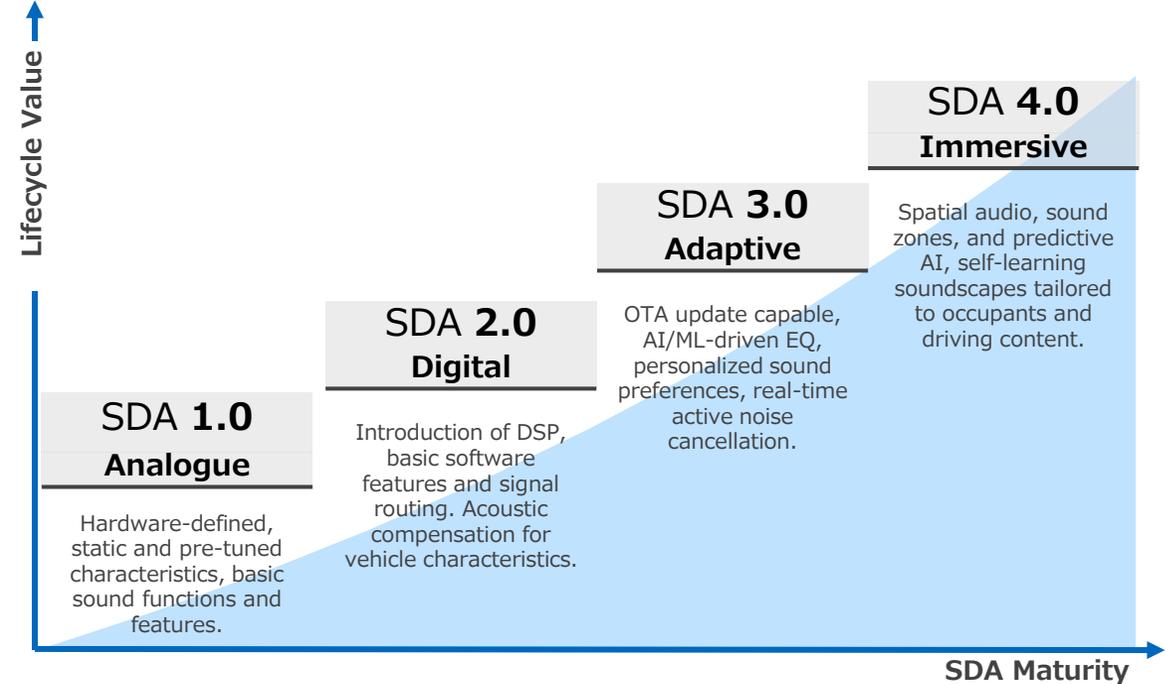✓ **Clarifies where software creates differentiation**

Providing structured guidance on the value contribution of tuning, personalization, OTA feature evolution, and Features-as-a-Service (FaaS).

✓ **Aligns consumer expectations, brand identity, and E/E prerequisites**

Ensuring audio roadmaps match OEM brand positioning, UX goals, and the realities of central compute, zonal architectures, and SDV-native development workflows.

✓ **Establishes a shared language for OEM–supplier collaboration**

Reducing friction by defining maturity progression, enabling suppliers to articulate capabilities clearly, and giving OEMs a standardized basis for comparing approaches outside of BOM-driven procurement.

Lifecycle Value →

SDA 1.0 — Analogue
Hardware-defined, static and pre-tuned characteristics, basic sound functions and features.

SDA 2.0 — Digital
Introduction of DSP, basic software features and signal routing. Acoustic compensation for vehicle characteristics.

SDA 3.0 — Adaptive
OTA update capable, AI/ML-driven EQ, personalized sound preferences, real-time active noise cancellation.

SDA 4.0 — Immersive
Spatial audio, sound zones, and predictive AI, self-learning soundscapes tailored to occupants and driving content.

SDA Maturity →

Sponsor's Role

- Shape the direction of the framework through direct input.

- Influence the voice of the customer survey questions to shape discovery of what customers value most.

- Showcase technical capabilities mapped to the SDA Maturity Framework.

Initiative Components

Software-Defined Audio Framework
Industry blueprint for technical and CX excellence with supplier ecosystem mapped capabilities

Consumer Survey (US, EU & CN)
Data and Insight on priority features, value drivers, perceived audio branding, and monetization opportunities

Research Report
Actionable forward-looking analysis that clarifies the strategic roadmap, perquisites and value

SBD Automotive Industry Roadshow
High-visibility showcase and education to elevate market awareness through targeted industry engagement.

Sponsors onboard by April 15th, 2026

Delivered by June 30th, 2026

Ongoing

About SBD Automotive

SBD Automotive is a global automotive research and consulting firm which combines primary research, competitive benchmarking, and deep technical analysis to help automotive OEMs and ecosystem partners design differentiated digital cockpit experiences, architect scalable SDV platforms, and optimize premium audio strategies. SBD Automotive translates market intelligence and industry insights into clear, actionable strategies for delivering Safe, Secure, Sustainable and Seamless mobility outcomes worldwide.

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