SBD Automotive

Research Reports - 2026

SBD's expansive research library provides automotive industry professionals with the essential reports and insights they need

Q1 2026



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6 Appendix: Basic Terms of Sale & Contact Us

1

Who We Are

About Us

28
YEARS
1997-2025

Helping our clients succeed through **safe**, **secure**, **seamless** & **sustainable** mobility*

*What we're not: another management consulting company.

Our Areas of Expertise


Connected Vehicles


Autonomous Vehicles


SW-Defined Vehicles

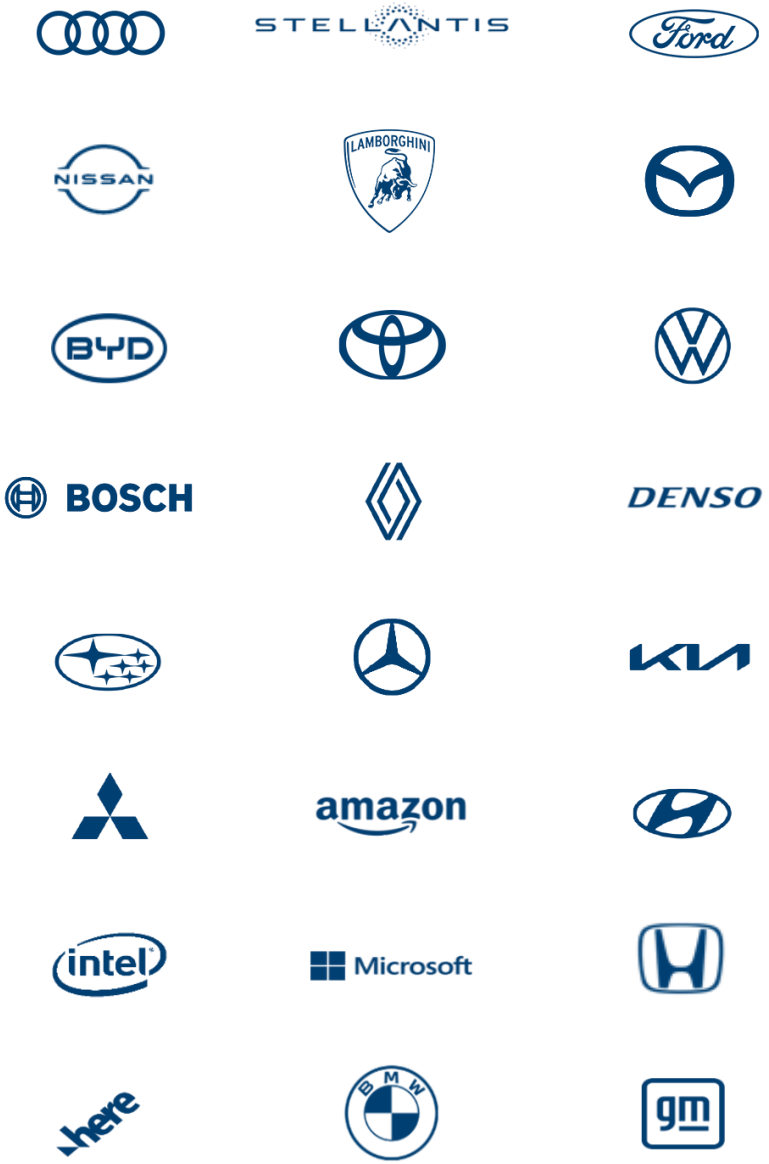

Electric Vehicles


Cyber Security

Our Regional Offices

USA | **UK** (Headquarters) | **Germany** | **India** | **China** | **Japan**

sample clients **we support**



What drives us? **4S Mobility**



Bringing **humanity together** through **Safe**, **Secure**, **Sustainable** and **Seamless Mobility**

What make us unique?



Passionate.

Our passion for delivering 4S mobility means we'll always go the extra mile to help you succeed.



Expert.

Our expertise means we can challenge clients to ask the right questions and guide them to the right answers.



Independent.

Our independence means you'll always get hype-free, holistic, and objective insights and recommendations.

What our clients think

"Throughout the entire project, SBD delivered an unparalleled level of support, embedding actionable insights in fresh new ways that helped us make quick decisions. We couldn't have done it without them.

Head of Mobility, **Major Automotive OEM**

2026 Report Catalog Introduction

Broader Context To Help Prioritize What Insights Matter

SBD's 2026 Catalog Solutions

- Added **9 new titles** with a more focus on eco system coverage and deeper research into technology and feature availability across domains.
- **Enhanced context and breath of coverage** though domain specific **Industry Events reports** across SDV and Digital Connected Services.
- A new **Quarterly Technology & Innovation Tracker** focused on **Chinese OEMs and Technology Players** developed by our analysts in the market.
- **Introducing** contextual **Consumer Insights** data and analysis into 4 Guides to help bring clarity to market need and consumer expectation.
- **Improved Playbook reports** that brings together the key trends across the domain to help analyze market positioning of an OEM across a normalized view of the entire domain.
- **Improving accessibility of data** and comparison views between OEMs **on 16 Guides** by simplifying our data dashboards.

Domains That Are Aligned To Automotive Functions

Software-Defined Vehicles

4 reports +

Digital Connected Services

8 reports +

Cockpit & Infotainment

5 reports +

Electrification

7 reports +

ADAS & Autonomy

4 reports

Security

4 reports

User Experience

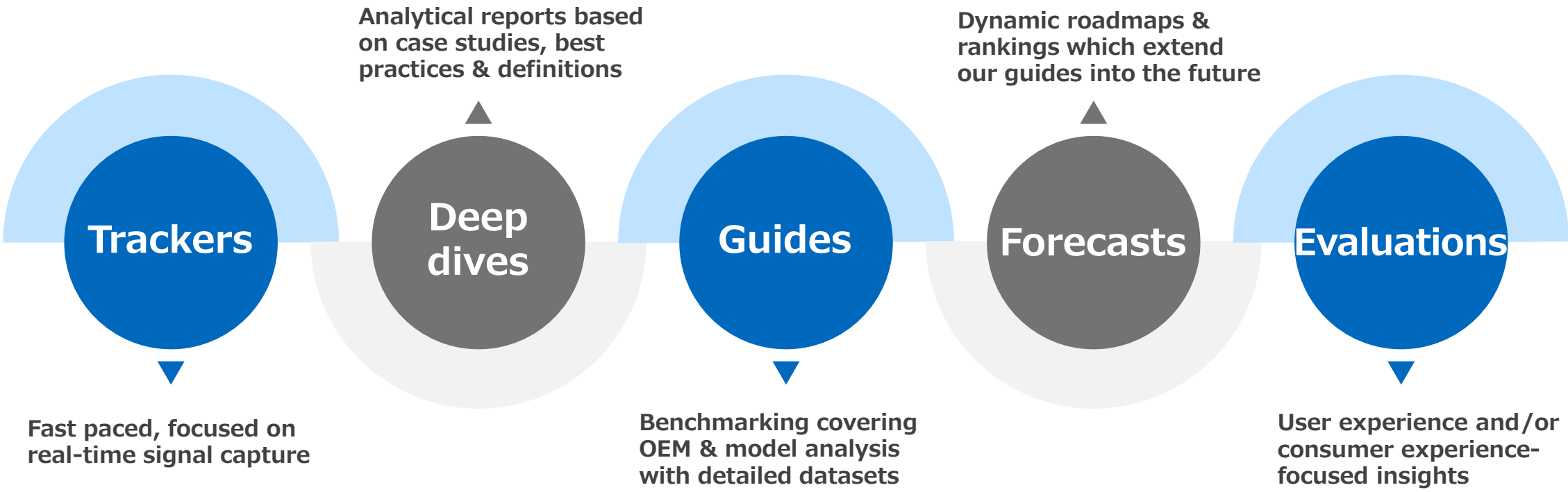
3 reports

Innovation & Strategy

10 reports

Playbook Report Available: Customer-specific insights delivered quarterly interfacing across data contextualizing what, how, why and so-what of the domain

Report Types That Are Designed for Specific Needs



Highlights ▶▶▶

Shorter form content focused on summaries, key snippets, niche topics and breaking news

New for 2026: Playbooks

IMPROVED FOR 2026

Playbooks

Customer-specific studies which interface across data contextualizing the what, how, why and so-what

Challenges facing the industry today

Automotive OEMs

- Struggle to benchmark their competitiveness across critical market domains.
- Need clear visibility into how “best-in-class” peers are achieving leadership.

Suppliers & Ecosystem Partners

- Lack timely insight into the strategic, technological, and feature decisions of their OEM customers.
- Require better intelligence to align offerings and anticipate future needs.

Our solution – Playbooks

- Our Playbooks breaks down the **best-in-class** across key domains with grounded data and evidence
- For each domain, they contextualize the **‘what and why’** of these solutions through using our rankings and add personalized analysis, while mapping out next steps
- 4 of our 8 industry domains will offer Playbooks in 2026 **exclusively to Domain Pass and Full Catalog** purchasers
- These Playbooks are tailor-made for your needs – **summarizing what you need to know**, allowing you to analyze yourself against/within a normalized view of the entire domain.

Our Playbooks provide

- **For Automotive OEMs:** An essential tool that delivers a clear, objective view of each market domain — highlighting your position versus competitors, pinpointing areas of advantage, and exposing gaps to close in global markets.
- **For Suppliers & Ecosystem Partners:** A critical resource offering deep insight into OEMs’ strategic priorities — enabling you to align roadmaps, anticipate needs, and craft robust commercial strategies that strengthen partnerships.

Overview of Our 2026 Reports Catalog Titles

SDV Software-Defined Vehicles

- **401** - Software-Defined Vehicle Guide
- **402** - Software-Defined Vehicle Forecast 2027-2037
- **440** - **Software-Defined Vehicle Industry Events Tracker**
- **636** - **Software-Defined Vehicle Ecosystem Players Guide**

Digital Connected Service

- **526** - Connected & Digital Services Guide
- **528** - Connected Car Legislation Tracker
- **536** - Connected Car Forecast 2027-2037
- **540** - **Digital Connected Services Industry Events Tracker**
- **546** - LCV Fleets Connected & Digital Services Guide
- **565** - **Digital Connected Services Ecosystem Players Guide**
- **638** - FOTA & Software Delivered Features Guide
- **712** - Digital Key Guide

Cockpit & Infotainment

- **531** - Automotive Smartphone Companion App Guide
- **616** - Digital Cockpit & Infotainment Guide
- **644** - Digital Cockpit & Infotainment Forecast 2027-2037
- **651** - Automotive Cockpit App & Ecosystem Guide
- **656** - In-Car VPA & Voice Guide

Electrification

- **217** - EV Charging & Infrastructure Guide
- **218** - EV & Sustainability Legislation Tracker
- **219** - EV Battery Technologies Guide
- **223** - EV Digital Services & Features Guide
- **224** - HEMS, V2G & Future of Smart Vehicle Charging Guide
- **228** - EV Incentives Tracker
- **623** - Electric Vehicle Guide

ADAS & Autonomy

- **534** - ADAS & Autonomy Guide
- **538** - ADAS & Autonomy Forecast 2027-2037
- **535** - Autonomous Car Legislation Tracker
- **816** - **Autonomous Strategies & Ecosystem Players Guide**

Security

- **539** - Cyber & SDV Legislation Tracker
- **554** - E-Theft Threat Guide
- **905** - Cyber Intelligence Guide
- **907** - **Cyber Trends Guide**

User Experience

- **635** - Automotive UX Evaluation
- **645e** - **Vehicle UX Best Practice: Robo Taxis**
- **645f** - **Vehicle UX Best Practice: AI Use Cases**

Innovation & Strategy

- **201** - Innovation Guide
- **202** - Start-up and Partnerships Tracker
- **215** - AI for Automotive Guide
- **225** - Automotive Sustainability Guide
- **298** - Automotive Roadmaps Tracker
- **301** - Premium Event Report
- **351** - Disruptions to Vehicle Ownership Deep Dive
- **353** - **China: Technology & Feature Innovation Tracker**
- **403** - **Automotive Organization Strategies Deep Dive**
- **750** - **Business Strategies of Disruptor OEMs Deep Dive**

Highlights

- **2210** - Quarterly Highlights
- **3000** - Event Flash Report

New for 2026

Our Engagement Model

Individual Report

Individual reports that explore our core domains through topics such as innovation scanning, feature planning, and competitive benchmarking

Access to **purchased reports**

- Access to **Quarterly Highlights** report
- Access to **Industry Event Highlights**
- Report **Query Support**

Strategic Domain

A set of domain passes that each provide a foundational view of a topic and a powerful, custom-made, Playbook for select domains.

Access to all **domain specific reports**

All benefits of **Individual Report** plus:

- Access to **domain specific Playbook**
- Access to select domain specific **strategic titles** from past catalogs
- **Premium support** on domain reports
- Quarterly **Analyst Briefing**
- **Customize** selection criteria of Playbook

Includes Bundle Discount

Full Catalog

Our entire expertise in one offering, covering all major domains and custom Playbooks that deliver rich, contextual, and personalized insights

Access to **entire catalog**

All benefits of **Strategic Domain** plus:

- Access to **all domain Playbooks**
- Access to select **strategic titles** from all domains from past catalogs
- **Collaboration** on Playbooks **development**
- Quarterly **Analyst Briefing + Q&A**
- **Influence** SBD research focus & content we create

Includes Additional Discount

3

Pricing & Packaging

Domain Packaging

Our Pricing Model

Individual Report

Individual reports that explore our core domains through topics such as innovation scanning, feature planning, and competitive benchmarking

Access to **purchased reports**

Pay-per-report

Strategic Domain

A set of domain passes that each provide a foundational view of a topic and a powerful, custom-made, Playbook for select domains.

Access to all **domain specific reports**

Domain	Global Reports	Single Region Reports*
Software-Defined Vehicles		
Digital Connected Services		
Cockpit & Infotainment		
Electrification		
ADAS & Autonomy		
Security		
User Experience		
Innovation & Strategy		

Full Catalog

Our entire expertise in one offering, covering all major domains and custom Playbooks that deliver rich, contextual, and personalized insights

Access to **entire catalog**

Catalog	Global	Single Region*
Full Access		

* includes region-specific editions from multi-region reports and all global reports

Software-Defined Vehicle Domain

Reports

Code	Title	New 2026	Type	Frequency	Publication Date CY 2026				Format		Regional Editions		
					Q1	Q2	Q3	Q4	PPT/PDF	XLS	USA	EUR	China
401	Software-Defined Vehicle Guide		Guide	Annual		●			●	●	Global		
402	Software-Defined Vehicle Forecast 2027-2037		Forecast	Annual				●	●	●	Global		
440	Software-Defined Vehicle Industry Events Tracker	●	Tracker	3 Shows	Varies By Event				●		Global		
636	Software-Defined Vehicle Ecosystem Players Guide	●	Guide	Annual	●				●		Global		
450	SDV Enablement Playbook	●	Playbook	6 Monthly Refresh	●		Refresh		PDF		Global		

Software-Defined Vehicle Domain Pass

Key Benefits This Domain Pass Helps Address

- Identify SDV EE architectures, s/w and functional strategies set by various OEMs
- Provides a deep dive on how an OEM achieved best-in-class SDV architecture and how were they able to deliver a leading connected experience
- Highlights the architecture and software strategy utilized to achieve this

Complimentary 2025 Title

- 405 Sourcing the SDV

Playbook: Outlines an OEM's position within SDV and identifies gaps separating them from competitors in EE architecture, Cyber, S/W Application and cloud layers

SDV Enablement Playbook
(Link)

Digital Connected Services Domain

Reports

Code	Title	New 2026	Type	Frequency	Publication Date CY 2026 Q1	Q2	Q3	Q4	Format PPT/PDF	XLS	Regional Editions USA	EUR	China
526	Connected & Digital Services Guide		Guide	2 x year	●		●		●	●	●	●	●
528	Connected Car Legislation Tracker		Tracker	Quarterly	●	●	●	●	●	●	Global		
536	Connected Car Forecast 2027-2037		Forecast	Annual				●	●	●	Global		
540	Digital Connected Services Industry Events Tracker	●	Tracker	3 Shows	Varies By Event				●		Global		
546	LCV Fleets Connected & Digital Services Guide		Guide	Annual		●			●	●	●	●	
565	Digital Connected Services Ecosystem Players Guide	●	Guide	Annual		●			●		Global		
638	FOTA & Software Delivered Features Guide		Guide	Quarterly	●	●	●	●	●	●	●	●	●
712	Digital Key Guide		Guide	Annual			●		●	●	●	●	●
550	Connected Technologies Enablement Playbook	●	Playbook	6 Monthly Refresh		●		Refresh	PDF		Global		

Digital Connected Services Domain Pass

Key Benefits This Domain Pass Helps Address

- Detailed view and insights of OEM vehicle connectivity, service offerings, and services across each of their brands and models
- Visibility into digital services available and what consumers can download post-sale
- Strategies on hardware/cockpit interfacing with FaaS and FOTA

Complimentary 2025 Title

- 406 Software Development for the SDV

Playbook: Outlines an OEM's position within connected technologies and identifies gaps separating them from competitors in OTA, FaaS & digital keys

Connected Technologies Enablement Playbook (Link)

Cockpit & Infotainment Domain

Reports

Code	Title	New 2026	Type	Frequency	Publication Date CY 2026				Format		Regional Editions		
					Q1	Q2	Q3	Q4	PPT/PDF	XLS	USA	EUR	China
531	Automotive Smartphone Companion App Guide		Guide	Annual		●			●	●	●	●	●
616	Digital Cockpit & Infotainment Guide		Guide	2 x year	●		●		●	●	●	●	●
644	Digital Cockpit & Infotainment Forecast 2027-2037		Forecast	Annual				●	●	●	Global		
651	Automotive Cockpit App & Ecosystem Guide	●	Guide	Annual		●			●	●	●	●	●
656	In-Car VPA and Voice Guide	●	Guide	Annual		●			●	●	Global		
600	Digital Connected Experience Playbook	●	Playbook	6 Monthly Refresh	●		Refresh		PDF		Global		

Cockpit & Infotainment Domain Pass

Key Benefits This Domain Pass Helps Address

- Compare digital cockpit and infotainment system fitment and pricing strategies
- Strategies used for delivering smartphone companion apps and OEM cockpit apps
- Expert view on how disruptions in service enablers like voice can be built into better cockpit experiences

Complimentary 2025 Title

- 635(25j) 2025 Summary Report - In-Car HMI UX Evaluation & Benchmarking

Playbook: Outlines an OEM's position in Connected Experiences analyzing underlying enablers and identifies gaps separating them from competitors in Cockpit Apps, HUD and In Car VPA

Digital Connected Experience Playbook (Link)

Electrification Domain

Reports

Code	Title	New 2026	Type	Frequency	Publication Date CY 2026				Format		Regional Editions		
					Q1	Q2	Q3	Q4	PPT/PDF	XLS	USA	EUR	China
217	EV Charging & Infrastructure Guide		Guide	2 x year		●		●	●	●	●	●	
218	EV & Sustainability Legislation **Tracker**		Tracker	Quarterly	●	●	●	●	●	●	Global		
219	EV Battery Technologies Guide		Guide	Annual		●			●	●	Global		
223	EV Digital Services & Features Guide		Guide	Annual			●		●	●	Global		
224	HEMS, V2G & Future of Smart Vehicle Charging Guide		Guide	Annual				●	●	●	Global		
228	EV Incentives Tracker		Tracker	Quarterly	●	●	●	●	●	●	Global		
623	EV Guide		Guide	2 x year	●		●		●	●	●	●	●
200	EV Experience Playbook	●	Playbook	6 Monthly Refresh	●		Refresh		PDF		Global		

Electrification Domain Pass

Key Benefits This Domain Pass Helps Address

- Analyze how OEMs are differentiating their EV features and services including driving status, charging availability, service ecosystem, digital payments, etc.
- Plan infrastructure roadmap, partner identification and EV user journey experience
- Optimize EV digital experiences and customer touchpoints across apps, navigation experience and charging services

Complimentary 2025 Title

- 645d Vehicle UX Best Practice: Public Charging for EVs

Playbook: Outlines an OEM's position within charging experience and identifies gaps separating them from competitors on topics like public charging, EV app, navigation etc.

EV Experience Playbook
(Link)

ADAS & Autonomy Domain

Reports

Code	Title	New 2026	Type	Frequency	Publication Date CY 2026				Format		Regional Editions		
					Q1	Q2	Q3	Q4	PPT/PDF	XLS	USA	EUR	China
534	**ADAS & Autonomy Guide**		Guide	Annual		●			●	●	●	●	●
535	**Autonomous Car Legislation Tracker**		Tracker	Quarterly	●	●	●	●	●	●	Global		
538	**ADAS & Autonomy Forecast 2027-2037**		Forecast	Annual				●	●	●	USA & EUR (excl. China)		
816	**Autonomous Strategies & Ecosystem Players Deep Dive**	●	Analytical	Annual	●				●		Global		

ADAS & Autonomy Domain Pass

Key Benefits This Domain Pass Helps Address

- Understand the differences in strategies used by OEMs to provide ADAS systems and what underlying technologies/suppliers they rely upon
- Evaluate the functional differences and ecosystem partnerships leveraged between similar features offered by each OEM
- Plan sensor strategies based on how L0-L3 uptake is expected to evolve over the next 10 years

Complimentary 2023 Title

- 817 Localization & Map-based ADAS

Security Domain

Reports

Code	Title	New 2026	Type	Frequency	Publication Date CY 2026				Format		Regional Editions		
					Q1	Q2	Q3	Q4	PPT/PDF	XLS	USA	EUR	China
539	Cyber & SDV Legislation Tracker		Tracker	Quarterly	●	●	●	●	●	●	Global		
554	E-Theft Threat Guide		Guide	Annual		●			●	●	Global		
905	Cyber Intelligence Guide		Guide	2 x year	●		●		●	●	Global		
907	Cyber Trends Guide	●	Guide	Annual			●		●		Global		

Security Domain Pass

Key Benefits This Domain Pass Helps Address

- Understand the type and breadth of tools and devices available to overcome security systems, bypass systems, program keys/ECUs, re-write commands or data, or re-flash vehicle firmware
- Track real-world theft methods that have an impact on the desirability or insurability of vehicles
- Monitor cyber security regulatory changes in various regions and gain insights into the impact of new and existing legislation and mandates

Complimentary 2025 Title

- 408 Scaling the SDV

User Experience Domain

Reports

Code	Title	New 2026	Type	Frequency	Publication Date CY 2026 Q1	Q2	Q3	Q4	Format PPT/ PDF	XLS	Regional Editions USA	EUR	China
635	Automotive UX Evaluation		Evaluation	9 x year + summary	●	●	●	●	●		Global		
645e	Vehicle UX Evaluation: Robotaxis	●	Evaluation	Annual		●			●		Global		
645f	Vehicle UX Evaluation : AI Use cases	●	Evaluation	Annual			●		●		Global		

Targeted list of 9 vehicles for 2026 UX Evaluation (3 test in China, 4 in Europe and 2 in the USA)

Priority target vehicles: BMW Neue Klasse IX3 or 3 series
Zeekr 7X
AUDI E5 (China)
Lucid Gravity
Honda/Sony Afeela 1
Mercedes CLA or GLC

Vehicles Considered (TBC): Maextro S800
Citroen DS8
IM LS9

User Experience Domain Pass

Key Benefits This Domain Pass Helps Address

- Receive fair, unbiased and objective views and insights of the latest in-vehicle HMI solutions in the US, Europe, and China markets
- Evaluations are carried out by user experience experts with a deep understanding of the infotainment, navigation, ADAS, and autonomy domains.
- Actionable Kano analysis and benchmarked ranking across multiple years of UX testing

Complimentary 2025 Title

- 635(24c) Xiaomi SU7 - In-Car HMI UX Evaluation & Benchmarking

Innovation & Strategy Domain

Reports

Code	Title	New 2026	Type	Frequency	Publication Date CY 2026				Format		Regional Editions		
					Q1	Q2	Q3	Q4	PPT/PDF	XLS	USA	EUR	China
201	Innovation Guide		Guide	2 x year		●		●	●	●	Global		
202	Start-up and Partnerships Tracker		Tracker	Quarterly	●	●	●	●	●	●	Global		
215	AI for Automotive Guide		Guide	2 x year	●		●		●	●	Global		
225	Automotive Sustainability Guide		Guide	Annual			●		●	●	Global		
298	Automotive Roadmaps Tracker		Tracker	Weekly	●	●	●	●		●	Global		
301	Industry Event Tracker		Tracker	3 events	Varies By Event				●		Global		
351	Disruptions to Vehicle Ownership Deep dive		Deep dive	Annual		●			●		Global		
353	China: Technology & Feature Innovation Tracker	●	Tracker	Quarterly	●	●	●	●	●				●
403	Automotive Organization Strategies Deep Dive	●	Deep dive	Annual			●		●		Global		
750	Business Strategies of Disruptor OEMs Deep Dive	●	Deep dive	Annual		●			●		Global		

Innovation & Strategy Domain Pass

Key Benefits This Domain Pass Helps Address

- Understand the broad cross-section of new and upcoming disruptive technologies while cutting through the hype and clarifying potential automotive use cases
- Actionable insights on AI, sustainability, start-ups helping monitor and/or act on these trends
- Track technologies that help OEMs progress to their next generation of vehicles though fast paced signal tracking and long-term roadmaps plotted in our reports

Complimentary 2025 Title

- 251 2040 Vehicle Technology Guide

I Highlights

Reports

Code	Title	New 2026	Type	Frequency	Publication Date CY 2026 Q1	Q2	Q3	Q4	Format PPT/PDF	XLS	USA	EUR	China
2210	**Quarterly Highlights**		Highlights	Quarterly	●	●	●	●	●		Global		
3000	**Industry Event Highlights**		Highlights	Up to 5 events	●				●		Global		

Free for all report customers

4

2024/2025 Reports

2024/2025 Report Titles (Not re-published in 2026, but currently available for sale!)

Reports

Code	Title	Publication Date	Format		Regional Editions		
			PPT/PDF	XLS	USA	EUR	China
251	2040 Vehicle Technology Guide	Dec-2025	●		Global		
407	Automotive OS for SDV Deep Dive	Jun-2025	●		Global		
408	Scaling the SDV Deep Dive	Jun-2025	●		Global		
628	China Head-Unit Tracker	Dec-2025	●	●	Global		
635	Automotive UX Evaluation (Individual Vehicle Report)	2024/2025	●		Global		
645c	Vehicle UX Evaluation: Navigation for Electric Vehicles	Dec-2025	●		Global		
645d	Vehicle UX Evaluation: Public Charging for Electric Vehicles	Dec-2025	●		Global		

Software-Defined Vehicle Reports

SDV | Software-Defined Vehicles

401-

Software-Defined Vehicle Guide

Report Focus

OEM E/E platform, vehicle platform OS and dynamic software stack defining SDV strategies

Introduction

A planned, holistic, approach to architecting an SDV will increase vehicle safety, security and system usability, while also reducing costs to the manufacturer.

For 2026 SBD is expanding the SDV E/E Architecture Guide to a more holistic Software-Defined Vehicle Guide that evaluates today's state of-the-art architectures while supporting planners and engineers on the journey to enable an SDV. It further provides insight into key SDV trends and technologies, as well as the decisions enabling year-on-year delivery with optimal utility and cost to each vehicle made. An accompanying Excel version offers the latest data to encourage strong decision-making, with thousands of data points presented with every release.

Benefits

- E/E strategies and deployments covering over 60 automotive OEMs
- Detailed analysis of archetypes by models, Vehicle 3.0 archetypes, functional domains, centralized computing as well as ethernet bus, gateways, architype outliers, cost vs. complexity, and most technologies and deployments
- Single point of call for all your E/E architecture and software intelligence needs
- Complex EE circuit diagrams formulated into easy to analyze and interpret formats. Helping you understand the what OEMs are implementing, trends within and across them.

Contents



- **>8,000 datapoints**
- **60+ OEM Brands & 360 models**
- **Dashboards, Ranking, Ecosystem, and more**

XLS Data

Home Page
Content introduction and useful shortcut

Deep Dive
Data list at model-level detail including technical specifications, market coverage, pricing and sales figures

Executive Summary
Showcasing key points though data visualization

Comparison Dashboard
Pre-built interactive dashboard showing OEM to OEM comparisons

Ranking
OEMs ranking with details of single categories scores

Definitions & FAQs
Listing data and ranking definitions

PPT Insights

Introduction
What is the SDV Guide all about?

Executive Summary
Key report takeaways and ranking summary and related conclusions

The Basics
Introduction to the essentials of E/E architecture and software referenced throughout this study

What's New?
Latest news, archetype mentions and case study in the E/E architecture and software spaces

Analysis
E/E, software, application and cloud trends identified in the associated Excel spreadsheet, identifying patterns between the OEM groups and highlighting the market leaders, outliers and fast followers

Summary Tables
Summarizing the SDV trends and highlighting notable archetypes with simplified topological circuit diagrams (indicative)

SDV's Bird's Eye View
Key headlines from reports within the SDV Domain Pass

Future Outlook
Realizing the Benefits of Software Defined Vehicles

Next Steps
SBD advises on the so what and action to take as a reader

Useful Links:
Sample / Latest Edition

Markets Covered:
USA Europe China **Global**

Release /Update Timing
Q1 **Q2** Q3 Q4

Languages available
English **Japanese** Chinese

SDV | Software-Defined Vehicles

402-

Software-Defined Vehicle Forecast 2027-2037

Report Focus

2035 view of the OEM E/E platform, Vehicle Platform OS and Dynamic Software Stack for SDV

Introduction

The introduction of new car features and experiences relies heavily on each automaker's ability to successfully enable E/E architecture changes, software creation and deployment, and the introduction of scalable and connected platforms adopted from the broader ecosystem.

The Software-Defined Vehicle Forecast provides a grounded assessment covering the future growth of SDVs based on a detailed examination of the enablers and modelling underpinning SDV adoption across different automakers, segments, and regions. An adjacent Excel version offers detailed, data-driven, analysis by brand.

Benefits

- Highlights SDV strategies and scenarios mapped to specific OEMs' leading vehicle deployments, and the implications for the speed and volume of SDV transitions
- Identifies specific SDV enabling technologies and their role in shaping the future SDV
- Benchmarks SDV timing and adoption against major competitors
- Offers detailed 10-year forecasts of volumes and penetration rates of SDVs
- Provides a forward-looking view of our ranking in guides to provide a similar view 10 years into the future.
- Defined methodology that uses both top-down and bottom-up approaches

Contents



XLS Data

Home Page
Content introduction and useful shortcut

Market Forecast
OEM platform-level penetration over 10-year forecast

OEM Forecast
OEM brand-level architype penetration including volume and percentages

Definitions
Architype definitions

Signals and benchmarking
OEM-level signals review for vehicle 2.0, 3.0, and 4.0 enablers

PPT Insights

Introduction
How to understand the ten-year forecast on how major OEM groups will deploy future E/E architecture elements

Executive Summary
Key conclusions and forecast summary

The Basics
Introduction to the essentials of E/E architecture and software referenced throughout this study

Analysis
Analysis on industry signals and key trends in Software Defined Vehicles development over the next ten years

Summary Tables
OEMs' architype evolution from the current offering and over the next 15 and 10 years with mention of future strategies

SDV's Bird's Eye View
Key headlines from reports within the SDV Domain Pass

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Realizing the Benefits of Software Defined Vehicles

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Sample / Latest Edition

Markets Covered:
USA Europe China **Global**

Release /Update Timing
Q1 Q2 Q3 **Q4**

Languages available
English **Japanese** Chinese

SDV | Software-Defined Vehicles

440-

Software-Defined Vehicle Industry Events Tracker

Report Focus

Experts on-site at events reporting on innovations, products and partnerships and key insights

Introduction

There are no substitutes to the innovations, presentations, and new technologies introduced live during the world's largest consumer and automotive events and trade shows.

For 2026, SBD Automotive's SDV Industry Event Tracker will send experts on-site to cover events such as Automotive Ethernet Congress. These events have major implications for the automotive industry and provide an opportunity for companies from around the world to showcase their latest innovations, products and partnerships.

SBD Automotive's SDV Industry Event Tracker is your way to stay up-to-date on the SDV topic with the reveals, demonstrations, sessions, trends and implications of the industry's most important events.

Benefits

- Highlights insights and discussions on SDV technology and development
- Rapid and comprehensive reactions to all tech-related announcements at these major events
- Key talking points and themes from each event extracted and clarified to help teams with internal briefings
- Designed for industry professionals, these in-depth publications cover every auto tech announcement

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Markets Covered:

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Release /Update Timing

3 Pre-Show Summaries +
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Languages available

English Japanese Chinese

SDV | Software-Defined Vehicles

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Software-Defined Vehicle Ecosystem Players Guide

Report Focus

The report supports companies on their software-defined journey. It can prove a useful tool in helping assess, plan, and implement their vision for the software-defined vehicle, by providing useful information on business, technology, and supply chain.

Introduction

As OEMs integrate more software-defined solutions into their vehicles, there is the potential for future vehicle architecture to be defined by the software it uses, and the platforms adopted from its ecosystem. The end goal is a Software-Defined Vehicle (SDV) - a car that leverages software to reduce the cost of development, boost performance, and enhance the in-vehicle user experience.

SBD Automotive's SDV ecosystem players report supports OEMs and suppliers in identifying the SDV stakeholders and outlines how OEMs can utilize platforms and services to build cars that can be continually updated, and progressively maintained, by cross-platform software.

Benefits

- Defines the SDV: Understand the Software Defined Vehicle, the KPIs, high-level architecture and patterns, and the key technology domains.
- Global OEM activities & impacts: How SDVs are changing OEM businesses, as well as their partnerships, investments, platforms and organizations.
- Supply chain activities and impacts: How tier 1s, tier 2s and service providers support the SDV.

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Markets Covered:
USA Europe China **Global**

Release /Update Timing
Q1 Q2 Q3 Q4

Languages available
English **Japanese** Chinese

SDV Software-Defined Vehicles

404 –

Securing the Software-Defined Vehicle

Introduction

As the automotive industry shifts its focus from hardware to software and from discrete ECUs to HPCs, new cyber security threats and attack points will be introduced, requiring OEMs and suppliers to manage new risks and adopt new mitigation technologies.

The aim of this report is to take a chip-to-cloud look at Software-Defined Vehicles, to provide a high-level threat model of a typical architecture and to identify best practice for preventing, detecting and containing malicious cyber security attacks at each layer of the SDV technology stack.

Benefits

- Know what questions to ask and answers to expect when developing your SDV cyber security strategy
- Understand and plan for new threats and attack points early in the concept stage to avoid late and expensive design changes
- Identify best practice and industry direction to remain competitive without over-engineering your designs.
- An accessible training guide for OEMs as new in-house software teams take responsibility for cyber security for the first time

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Secure software
Keywords: Hypervisor, container, runtime monitoring, integrity checks, etc.

Secure cloud
Keywords: Edge & cloud computing, containers, API security etc.

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Keywords: Deciding how much is enough, R155 compliance, future roadmap, etc.

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Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Sept. 2023

Languages available

English **Japanese** Chinese

SDV | Software-Defined Vehicles

405-

Sourcing the Software Defined Vehicle

Report Focus

The shift to software-defined vehicles is disrupting the automotive supply chain, reshaping OEM–supplier relationships, and driving new strategies for technology readiness, ECU consolidation, and organizational alignment.

Introduction

The rise of software-defined vehicles (SDVs) is unlocking opportunities for OEMs that were not possible with traditional automotive architectures, enabling safer features, more convenience, and enhanced user experiences. This shift is reshaping the supply chain as OEMs strengthen in-house software capabilities, reducing reliance on traditional Tier 1 suppliers. In response, established suppliers are diversifying their strategies, while new entrants are moving up to Tier 1 or even Tier 0.5 status through joint development partnerships with OEMs. The report explores these disruptions through SBD market intelligence and OEM interviews, analyzing SDV maturity levels, OEM approaches, supplier readiness, and ECU consolidation trends.

Benefits

- Clarity on the evolving requirements OEMs will issue to both traditional and non-traditional electronics, software, and platform suppliers as their SDV platforms mature.
- Unlock opportunities from advances in SoC capabilities that enable ECU consolidation and greater efficiency.
- Understand which electronic components and domains will be consolidated, when, and by which types of OEMs—helping you align with leaders, fast followers, and laggards.
- Assess and strengthen your organizational and portfolio readiness for the SDV using industry benchmarks and OEM insights.

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Useful Links:

Sample

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Jan. 2024

Languages available

English **Japanese** Chinese

SDV | Software-Defined Vehicles

406-

Software Development for the SDV

Report Focus

Considering implications of Three Design Principles on software development: Modular Software, Getting Data in and out of the vehicle, Continuous Development

Introduction

Software development sits at the core of SDV success, and is having a transformative impact on vehicle development, E/E platform evolution, and how roles and responsibilities between automakers, enabling technologies, and the supplier ecosystem are evolving at large. Following the publish of four SBD industry-leading SDV publications in 2024, Report 406 takes a strategic look into how automotive OEMs and the ecosystem around them are specifically tackling the most critical software development challenges for the SDV. The research will further identify how automakers and their partners are leveraging the cloud, digital twin and DevOps tool kits to further accelerate SDV software development and ensure success.

Benefits

- Identification of software best practices from industry disruptors who are leading the SDV revolution
- Understand how organizational and technical strategies can work together to optimize vehicle software development
- Greater confidence and direction to build your SDV software strategy with grounded roadmaps, case studies, software domain insights, and a holistic view of this complex ecosystem

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Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China Global

Release /Update Timing

Sept. 2024

Languages available

English Japanese Chinese

407-

Automotive OS for SDV Deep Dive

Report Focus

Choices for vehicle operating systems, commercial models and the maturities of open-source SW

Introduction

In a world of software-hardware decoupling, managing the complexity of the growing supplier base will be one of the biggest challenges an OEM will face while realizing the SDV. Here, OEMs will need to prioritize systems that help address this by promoting collaboration and faster integration. OS platforms have the potential to boost product competitiveness for OEMs, but must go through rigorous market verification and meet international advanced standards.

Developing a sourcing plan for a thorough evaluation of open-source, and how to accommodate it, will be critical for OEMs interested in, or actively develop, a software-defined vehicle. This study will support those OEMs in deciding what to in-source and outsource from a software development standpoint.

Benefits

- Identify OEM preferences on OS sourcing and differences by safety criticality requirements.
- Map the commercial models of different in-vehicle OSes in the current market, their benefits to OEM business, and challenges to adoption.
- Evaluate the current maturity of open-source OSes for in-vehicle use
- Understand OEMs preferences on sourcing in-vehicle operating system in terms of in-house development and supplier contract.
- Review the potential impact of OS development on vehicle cost structures, comparing BOM-cost based vs TCO-based structures.

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Useful Links: Sample / Portal

Markets Covered: USA Europe China **Global**

Release /Update Timing **June 2025**

Languages available **English** **Japanese** Chinese

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Scaling the SDV Deep Dive

Report Focus

SDV H/W roadmap and EE architecture scaling, zonal architectures, decoupling of H/W and S/W

Introduction

As SDV strategies take center stage in OEM investments plans for the next product planning cycle, it is key to identify not just the short-term win in implementing SDV, but also the key milestones and roadmaps needed to scale them across models, carlines, platforms, and even regions. While many OEMs now have a defined sourcing strategy and implementation plans for SDV, cost, and complexity, both speed and timing can alter once scalability is put into focus.

This study focuses on future-casting SDV hardware roadmaps and planning E/E architecture transformation, alongside the decoupling of hardware and software, to help plan an OEM's next set of SDV milestones. It helps address ambiguity around the role of SDV across segments and regions and what problems need to be overcome to scale SDV. This will include decisions on considering a zonal architecture and aim to answer whether this is a key decision factor in scaling the SDV.

Benefits

- Detailed case study-based analysis at OEMs and partners on overcoming scaling to all/corner segments
- Reveals gaps in hardware and software capability for each OEM hardware, based on identifying best-in-class, disruptions and follower approaches
- Highlights differences in implementation and key focus areas (cost, complexity, speed, timing etc.)
- Plots the eco system and partnerships being set up by each OEM highlighting the key players in the value chain

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Useful Links: Sample / Portal

Markets Covered: USA Europe China **Global**

Release /Update Timing **April 2025**

Languages available **English** **Japanese** Chinese

Digital Connected Services Reports

Digital Connected Services

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Connected & Digital Services Guide

Report Focus

Connected vehicle strategies and features offered, including features-as-a-service (FaaS)

Introduction

Almost all automakers have now launched connected car services in one or more markets. With connectivity now considered to be a core part of every OEM's strategy, the focus has shifted to what car makers can do with it.

The Connected & Digital Services Guide includes everything that OEMs and suppliers need to pinpoint differences in connected vehicle strategies and features offered. Published on a bi-annual basis covering USA, EU, and China market. Additionally, the guide highlights features-as-a-service (FaaS) and various digital services such as video and gaming, showcasing the rapid evolution of service offerings.

Benefits

- Single point of call for all your connected car intelligence at model level
- Updated regularly to ensure you are always making key decisions with the latest data
- Over 100,000 data points per release, with highest standards of accuracy
- New connected car services comparison template showing more granularity between offerings
- FaaS and digital services coverage
- Connected platforms architectures mapped out and analyzed

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- **>320,000 datapoints**
- **39+ OEMs covered**
- **Smartphone duplication, FaaS details, Ranking, Ecosystem, and more**

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Release /Update Timing

Q1 Q2 **Q3** Q4

Languages available

English **Japanese** Chinese

Digital Connected Services

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Connected Car Legislation Tracker

Report Focus

Threats and opportunities generated by government mandates, licensing requirements, restrictions, policies, and guidelines

Introduction

SBD's Connected Car Legislation Tracker provides quarterly coverage of how and where legislation is impacting automotive connected services in Europe, the USA, and China. Information is also provided on relevant legislation from other countries around the world on an ad-hoc basis when an important development emerges. This guide identifies the threats, implications and opportunities generated by government mandates, incentives, standards, and other regional and country regulations.

Benefits

- Understand the legislation applicable in different regions, and across the globe, that will impact both connected services and the software-defined vehicle
- Identify the latest updates in developing legislation
- Focus on the most significant regional and global legislation and mandates
- Gain insight into the impact of new and existing legislation on vehicle manufacturers and Tier 1 suppliers

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Useful Links:
Sample / Latest Edition

Markets Covered:
USA Europe China Global

Release /Update Timing
Q1 Q2 Q3 Q4

Languages available
English Japanese Chinese

Digital Connected Services

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Connected Car Forecast 2027-2037

Report Focus

2035 view of availability of vehicle connectivity type and essential connected features, fitment rate by OEM and by market

Introduction

The market for connected car features relies on the correlation between technology readiness, government mandates, regulations, OEM investment policies, and vehicle lifecycle management as well as customer expectations and acceptance. SBD's Automotive's Connected Car Forecast provides a detailed outlook into the penetration of vehicle connectivity type and key connected features, detailing their fitment rate and OEM strategies in the market through 2035.

Benefits

- Realistic perspectives with expert assumptions based on vehicle fitment strategies adopted by OEMs, technology maturity & consumer acceptance of price point, and the likeliness consumers will expect or accept services
- This forecast delivers detailed guidance for industry stakeholders to understand the level of influence from the barriers and enablers driving vehicle connectivity
- Analysis broken down by region, connectivity type and service type (volumes and penetration rates)
- Provides a forward-looking view of our ranking in guides to provide a similar view 10 years into the future.

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Markets Covered:

USA Europe China **Global**

Release /Update Timing

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Languages available

English **Japanese** Chinese

Digital Connected Services

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Digital Connected Services Industry Events Tracker

Report Focus

Experts on-site at events reporting on innovations, products and partnerships and key insights

Introduction

There are no substitutes to the innovations, presentations, and new technologies introduced live during the world's largest consumer and automotive events and trade shows.

For 2026, SBD Automotive's Connected Digital Services Industry Event Tracker will send experts on-site to cover events such as Mobile World Congress. These events have major implications for the automotive industry and provide an opportunity for companies from around the world to showcase their latest innovations, products and partnerships.

SBD Automotive's Digital Connected Services Industry Event Tracker is your way to stay up-to-date on the Digital Connected Services topic with the reveals, demonstrations, sessions, trends and implications of the industry's most important events.

Benefits

- Highlights insights and discussions on SDV technology and development
- Rapid and comprehensive reactions to all tech-related announcements at these major events
- Key talking points and themes from each event extracted and clarified to help teams with internal briefings
- Designed for industry professionals, these in-depth publications cover every auto tech announcement

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Useful Links:

Sample

Markets Covered:

USA Europe TBC Global

Release /Update Timing

3 Pre-Show Summaries + 3 Premium Event Reports

Languages available

English Japanese Chinese

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LCV Fleets Connected & Digital Services Guide

Report Focus

Fleet management and connected vehicle strategies and features offered, including aftermarket solutions

Introduction

Across the passenger vehicle segment, connected car services are becoming increasingly common. Today, almost all OEMs have launched their services in at least one market – contributing to a vast ecosystem that benefits consumers and service providers alike. As this ecosystem grows, the connected services market for Light Commercial Vehicles (LCVs) is experiencing a similar evolution.

Our LCV Fleets Connected & Digital Services Guide provides key, up-to-date, insights into the connected services available for vehicles in the segment. In doing so, it details the landscape of these services while identifying the strategies being leveraged by service providers to deliver them. The report similarly highlights the latest supplier-OEM partnerships that will facilitate the development of new connected technologies, and assesses which OEMs have the most competitive connected service offering for LCVs overall.

Benefits

- Single point of call for all your connected LCV and related fleet management services intelligence needs
- Over 20,000 data points per release, with highest standards of accuracy

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Sample / Latest Edition

Markets Covered:

USA **Europe** China Global

Release /Update Timing

Q1 **Q2** Q3 Q4

Languages available

English **Japanese** Chinese

Digital Connected Services

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Digital Connected Services Ecosystem Players Guide

Report Focus

The report supports companies on their Digital Connected Services journey. It can prove a useful tool in helping assess, plan, and implement their vision, by providing useful information on business, technology, and supply chain.

Introduction

SBD Automotive's Digital Connected Services ecosystem players report supports OEMs and suppliers in identifying the stakeholders and outlines how OEMs can utilize platforms and services to build cars that can enable seamless end to end connectivity.

Benefits

- Defines the Ecosystem: Understand the services, the KPIs, high-level architecture and patterns, and the key technology domains.
- Global OEM activities & impacts: How Connected Digital Services are changing OEM businesses, as well as their partnerships, investments, platforms and organizations.
- Supply chain activities and impacts: How tier 1s, tier 2s and service providers support the ecosystem.

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Markets Covered:
USA Europe China **Global**

Release /Update Timing
Q1 **Q2** Q3 Q4

Languages available
English **Japanese** Chinese

Digital Connected Services

638-

FOTA & Software Delivered Features Guide

Report Focus

OEM activity around OTA, updates being delivered by OEMs and the technologies utilized

Introduction

Many OEMs have now ramped up their Firmware-Over-The-Air (FOTA) update strategies. As more OEMs update different ECUs in the car more regularly, it becomes harder for product planning and engineering teams to evaluate the competitiveness of features and platforms.

SBD's FOTA and Software Delivered Features Guide has been designed to track new capabilities and release cycles. It delves into the updates being delivered by OEMs today – identifying the types of updates being delivered, their frequency, and the technologies utilized in the process. The guide similarly understands the new feature types enabled through FOTA and how quickly OEMs are shifting towards implementing high-frequency updates.

Benefits

- Right-size your OTA strategy by evaluating how quickly competitors are shifting towards high-frequency updates
- Anticipate changes in consumer expectations by understanding what types of new features are being enabled via OTA
- Set internal KPIs around bug fixing and software releases

Note: Features-as-a-Service (FaaS) updates and business models are available in SBD Report 526 – Connected & Digital Services Guide

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- **>25,000 datapoints**
- **38+ OEMs covered**
- **OTA Update History, Ranking, Ecosystem**

XLS Data

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Useful Links:
Sample / Latest Edition

Markets Covered:
USA Europe China Global

Release /Update Timing
Q1 Q2 Q3 Q4

Languages available
English Japanese Chinese

Digital Connected Services

712-
Digital Key Guide

Report Focus
Features, pricing models and technologies used to deliver smartphone powered vehicle access services

Introduction
Digital key systems are the latest must-have automotive access technology. Using a smartphone to lock/unlock and start your car is not only seen as a premium feature, but in the future could be common across all vehicles, replacing current passive smart key systems and maybe even permanently replacing the key fob.

The annually-published Digital Key Guide tracks the latest offerings from OEMs in three major regions. Also tracked are the features and pricing models of each system, as well as the technologies used to produce them.

Benefits
- Understand different digital key technology variants, their pros and cons for convenience and security, and how they are applied on which vehicles by various OEMs
- Single point of call for all your questions around digital key fitment and pricing in the three main regions
- Compare after-market solutions with OEM offerings

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- **>4,000 datapoints**
- **15+ OEMs & >20 Aftermarket suppliers per region**
- **Ranking, Ecosystem, and more**

XLS Data

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Detailed feature definitions and common questions

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Introduction

Key questions answered in this report and an overview of each chapter

Executive Summary

Overview of how digital key technology has evolved over time, the ecosystem and stakeholders involved

The Basics

Digital key feature and technology classifications

What's New?

Focusing on the new partnerships, the latest technologies that OEMs have introduced or new digital key launches

Analysis

Quantitative and qualitative deep dive on key trends and market direction

Summary Tables

Summarizing the Digital Key Guide based on OEM groups

Connected & Digital Service Bird's Eye View

Key headlines from reports within the Connected & Digital services Domain Pass

Future Outlook

Realizing the benefits of digital keys in automotive

Next Steps

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA **Europe** **China** Global

Release /Update Timing

Q1 Q2 **Q3** Q4

Languages available

English **Japanese** Chinese

Cockpit & Infotainment Reports

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Automotive Smartphone Companion App Guide

Report Focus

Companion app features, services and mobile experience offered by OEMs

Introduction

As consumers become more acclimatized to a connected, digital experience, their perception of must-have to attractive features, and the overall quality of these digital touchpoints, will become a key factor in their experience.

For 2026, SBD will have two studies within the Cockpit & Infotainment domain focused on the overall app market for automotive OEMs. 531 and 651 - Automotive Cockpit App & Ecosystem Guide

SBD's Automotive Smartphone Companion App Guide helps you make sense of the differentiations between mobile apps (utilized away from the vehicle rather than apps on the infotainment system) offerings for automotive OEMs. A thorough analysis of this market assesses what features are available, identifies when they can be used (according to the state of the vehicle), and highlights their consumer rating based on app store reviews.

The guide ultimately draws a picture of the automotive app landscape by providing deep, expert insight into the latest trends and activities from OEMs on their mobile applications by region. To capture the latest data from this landscape, the guide is updated annually with analysis on new apps.

Benefits

- Granular detail covering the breadth of companion apps available today, and how the competition stacks up (embedded apps and app stores)

Note: A UX review of various companion apps is available via SBD Report 645a: Companion Apps

Contents



- **>53,000 datapoints**
- **39 OEMs & 200+ unique application details**
- **Smartphone app features, Ranking, and more**

XLS Data

Raw Data Sheet
Brand/model-level app data, including features and ratings/reviews

Screenshot Library
Database of all app UIs and smartphone duplications images to visualize their main functionalities

Comparison Dashboard
Comparison tabs by OEM/model

Dashboard
Pre-built dashboard showing OEM competitiveness

Ranking
A data-based scoring of each OEM

Definitions
Detailed feature definitions and common questions

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Key questions answered in this report and chapter overviews

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An overview of the mobile app market development, how consumers perceive this market, and who among OEMs/ third-party developers are gaining relevance in the automotive sector.

The Basics
Automotive app classifications & definitions

What's New?
Trends through the lens of the announcements, acquisitions, partnerships and case study

Analysis
Trends identified in the associated Excel spreadsheet, through the lens of alternative answers to two key questions: How and Which?

Summary Tables
Summary of the automotive apps and use cases covered by OEM groups

Cockpit & Infotainment Bird's Eye View
Key headlines from reports within the Cockpit & Infotainment Domain Pass

Future Outlook
Future-looking benefits for Cockpit & infotainment services/ strategies

Next Steps
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Useful Links:
Sample / Latest Edition

Markets Covered:
USA **Europe** **China** Global

Release /Update Timing
Q1 **Q2** Q3 Q4

Languages available
English **Japanese** Chinese

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Digital Cockpit & Infotainment Guide

Report Focus

In-car input and output HMIs and associated features, services and technologies, including pricing

Introduction

As vehicles become more automated, more immersive HMI technologies are introduced, and the in-vehicle cockpit is increasingly being referred to as the third living space.

SBD has put together a comprehensive Digital Cockpit & Infotainment Guide that includes everything automotive players need to know about how in-vehicle experiences and HMI systems are evolving. With more than 100,000 data points per release, it thoroughly details the availability, fitment, and pricing of cockpit systems while spotlighting key industry partnerships and trends.

Benefits

- Single point of call for digital cockpit and infotainment system fitment and pricing strategies at the model level
- Updated twice a year to ensure it is always fresh
- Profiles hundreds of individual configurations across the USA, Europe, and China, with more than 100,000 data points per release
- Includes queries on haptic feedback, digital rearview mirror, biometrics, and wireless charging data
- Model-level granularity of vehicle data, features, and pricing for the USA Europe and China regions, allowing analysis across SBD guides

Contents



- **>200,000 datapoints**
- **39+ OEMs covered**
- **Cockpit images, Supplier details, Ranking, Ecosystem, and more**

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Model-level cockpit platform/feature/pricing data

Screenshot Library
Database of HU Images

Query Builder
Tool allowing users to build their own queries and side-by-side comparisons

Dashboard
Pre-built dashboard showing OEM competitiveness

Definitions
Detailed feature definitions and common questions

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Key questions answered in this report and chapter overviews

Executive Summary
A high-level overview of the digital cockpit landscape across the regions covered by the report

The Basics
Defining some key aspects of digital cockpits

What's New?
Latest announcements, new cockpit designs and partnership activities

Summary Tables
Summarizing digital cockpit trends and features by OEM groups

Cockpit & Infotainment Bird's Eye View
Key headlines from reports within the Cockpit & Infotainment Domain Pass

Future Outlook
Future-looking benefits for Cockpit & infotainment services/ strategies

Next Steps
SBD advises on the so what and action to take as a reader

Useful Links:
Sample / Latest Edition

Markets Covered:
USA **Europe** **China** Global

Release /Update Timing
Q1 Q2 **Q3** Q4

Languages available
English **Japanese** Chinese

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Digital Cockpit & Infotainment Forecast 2027-2037

Report Focus

2035 view of penetration of cockpit elements and features with fitment rate

Introduction

The digital cockpit relies on the correlation between technology readiness and vehicle lifecycle management as well as customers' expectations and acceptance. Today, more intelligent cockpit solutions are being rolled out by an increasing number of OEMs around the world, with software-focused solutions constantly improving through over-the-air updates.

SBD Automotive's Digital Cockpit & Infotainment Forecast report provides an outlook on the penetration of cockpit elements and features, showing the fitment rate by market 10 years into the future. While highlighting alternative future technology trends, it offers deep analysis into cockpit systems by region, connectivity, and service type.

Benefits

- Forecasts of volumes and penetration rates of digital cockpits and infotainment in cars
- Analysis broken down by region, connectivity type and service type
- Future insights into enabling technologies, in-vehicle displays, user interfaces, and intelligent cockpits
- OEM categorization and data to segment innovators, Innovators, Early Adopters, Early Majority, Late Majority and market Laggards
- Defined methodology that uses both top-down and bottom-up approaches to provide an objective and realistic view into the future.
- Provides a forward-looking view of our ranking in guides to provide a similar view 10 years into the future.

Contents



XLS Data

Forecast Data Sheet

Brand/Country/Service-level hardware forecast, including revenues

Benchmarking & News

News by OEM and Region including description and links

Ranking (New for 2025)

Data-based ranking of OEMs

Definitions

Detailed feature definitions and common questions

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Defining the background and objectives of this report

Exec Summary

Key conclusions and high-level forecasts/changes

What's New?

Summary of what's changed from previous forecast

Key Trends

Analysis of service, feature and technology trends broken down by digital cockpit elements with additional potential routes for future development.

Cockpit & Infotainment Bird's Eye View

Key headlines from reports within the Cockpit & Infotainment Domain Pass

Next Steps

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 Q3 **Q4**

Languages available

English **Japanese** Chinese

651-

Automotive Cockpit App & Ecosystem Guide

Report Focus

Cockpit app features, app stores, services, experiences, and their enabling ecosystem

Introduction

To offer end-users the functionality they have come to expect in the consumer electronics world, automotive OEMs and other developers are offering apps in the center consoles of their cars. The Automotive Cockpit App Guide helps you make sense of the differentiations in the app offerings for automotive OEMs.

For 2026, SBD will have two studies within the Cockpit & Infotainment domain focused on the overall app market for automotive OEMs. 531 and 651 - Automotive Cockpit App & Ecosystem Guide.

A key focus for 2026 is the ecosystem used by each OEM to enable their apps and app stores. The guide draws a picture of the automotive app landscape by providing insight into the latest trends and activities from OEMs and 3rd-party players in their respective regions and is updated with the latest apps.

Benefits

- Complete view of the ecosystem an OEM utilizes to launch and maintain their cockpit app store and apps.
- Granular detail covering breadth of automotive offerings and how the competition stacks up (embedded apps and app stores)

- Over 100,000 data points, with highest standards of accuracy

Note: Detailed coverage of EV apps is available SBD Report 223 EV Digital Services & Features Guide.

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- **>53,000 datapoints**
- **35 OEMs & 200+ unique application details**
- **Cockpit app & app store, App Ecosystem, Ranking, and more**

XLS Data

Raw Data Sheet

Brand/Model-level app data, including features and ratings/reviews

Dashboard

Pre-built dashboard showing OEM competitiveness

Ranking

A data-based scoring of each OEM

Definitions

Detailed feature definitions and common questions

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Defining the background and objectives of this report

Executive Summary

An overview of the cockpit app market development, how consumers perceive this market, and who among OEMs/ third-party developers are gaining relevance in the automotive sector.

The Basics

Automotive Cockpit app classifications & definitions

What's New?

Trends through the lens of the announcements, acquisitions, partnerships and case study

Analysis

Trends identified in the associated Excel spreadsheet, through the lens of alternative answers to two key questions: How and Which?

Summary Tables

Summary of the automotive apps and use cases covered by OEM groups

Cockpit & Infotainment Bird's Eye View

Key headlines from reports within the Cockpit & Infotainment Domain Pass

Future Outlook

Future-looking benefits for Cockpit & infotainment services/ strategies

Next Steps

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA **Europe** **China** Global

Release /Update Timing

Q1 **Q2** Q3 Q4

Languages available

English **Japanese** Chinese

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In-Car VPA & Voice Guide

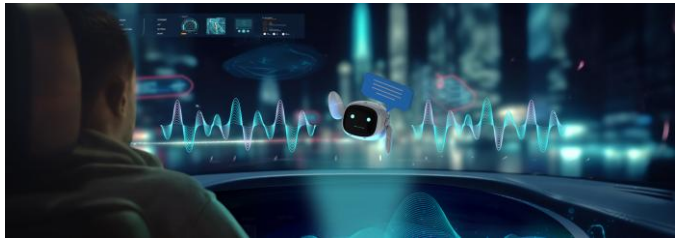
Report Focus
Voice assistants and voice-enabled services are powering new connected experiences

Introduction
Car manufacturers are increasingly adopting voice AI technologies to elevate the driving experience, boost safety, and enhance vehicle performance. In utilizing voice AI to manage various in-car functions, passengers can enjoy a more personalized and interactive journey while automakers can use them as brand differentiators. Alongside reliability and effectiveness in all environments and conditions, OEMs need to plan for a wide ecosystem of first- and third-party services to compete in this market.

SBD's In-Car VPA & Voice Guide details the latest virtual personal assistants (VPAs) being launched, while highlighting the range of VPA-adjacent features being delivered via OTA that expand on the role of voice in the car. This study will help OEMs prioritize a set of VPA and more broadly voice features that will be most effective for their customers, and more broadly plan a roadmap for the overarching role that voice AI can play in their vehicles.

Benefits
- Offers a database of VPA features by brand and model, while identifying the various states of use for each one
- Differentiates between multi-model, personalization, and orchestration layers including controlling multi-VPAs and other voice features
- Assesses the number of VPA updates delivered over time, using data from our OTA study
- Defines a set of unconnected capabilities that vehicles are offering today through voice as a service.

Contents



- **>50,000 datapoints**
- **30 OEMs & 100+ unique application details**
- **VPA features and development, Ranking, and more**

XLS Data

Raw Data Sheet
Brand/Model-level VPA data, including features and ratings/reviews

Dashboard
Pre-built dashboard showing OEM competitiveness

Ranking
A data-based scoring of each OEM

Definitions
Detailed feature definitions and common questions

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Defining the background and objectives of this report

Executive Summary
An overview of the Automotive VPA market development, how consumers/ OEMs perceive this market, and who among OEMs/ third-party developers are gaining relevance in the automotive sector.

The Basics
Automotive Virtual Personal Assistant classifications & definitions

What's New?
Trends through the lens of the announcements, acquisitions, partnerships and case study

Analysis
Analysis of service, feature and technology trends broken down by in-car VPA/voice AI elements with additional potential routes for future development?

Summary Tables
Summary of the automotive VPAs and use cases covered by OEM groups

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Key headlines from reports within the Cockpit & Infotainment Domain Pass

Future Outlook
Future-looking benefits for Cockpit & infotainment services/ strategies

Next Steps
SBD advises on the so what and action to take as a reader

Useful Links:
Sample / Latest Edition

Markets Covered:
USA Europe China **Global**

Release /Update Timing
Q1 **Q2** Q3 Q4

Languages available
English **Japanese** Chinese

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China Head-Unit Tracker

Report Focus
Head-unit fitment and feature, visual highlights & images, innovative services and it's availability at variant level

Introduction
The China automotive market has more new vehicle model launches and facelifts per month than any other region globally. International and domestic OEMs are constantly breaking new ground with innovative connectivity, content, and UX features – many of which are not yet seen in other markets.

This report is updated monthly for the China region and global decisionmakers to account for the development of these systems and provide up-to-date information to ensure overall competitiveness and feature parity. While highlighting the market's most innovative vehicle launches, it takes a deep dive into the offerings of one of these models. Here, expert analysis and insights are provided throughout as well as detailed comparisons between system generations.

Benefits
- Provides a dynamic summary of the infotainment and digital cabin highlights from key vehicle launches and flagship systems
- Ensure the market competitiveness of your next infotainment system or product launch
- Identify innovative new features to follow or bring to global markets
- Track systems and partners to bring your content or services to the market
- Analyze specifications (screen size, display, features, and more) of emerging systems

Contents



XLS Data

2025
2025 head-unit fitment and feature availability

HU Images 2025
Images of head-units launched in 2025

2024
2024 head-unit fitment and feature availability

HU Images 2024
Images of head-units launched in 2024

PPT Insights

Introduction
Key questions answered in this report and chapter overviews

The Basics
List new vehicle models released each month and identify new systems launched

What's New?
Latest activity in the digital cockpit space in terms of partnerships, investments and new product announcements

Summary Tables
System details of 4-6 systems each month
HMI and service comparisons of new systems

Next Steps
Can SBD help you with any unanswered questions?

Useful Links:
Sample / Latest Edition

Markets Covered:
USA Europe **China** Global

Release /Update Timing
Monthly

Languages available
English **Japanese** **Chinese**

Electrification Reports

Electrification

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EV Charging & Infrastructure Guide

Report Focus

Charging trends, CPO capabilities & OEM strategies impacting EV Infrastructure

Introduction

Today, rapidly-growing EV sales have motivated an interest in the build-up of charging networks. Optimizing these networks, however, is an increasingly complex challenge as the ecosystem evolves and consolidates quickly, while many CPOs continue to operate at a loss.
This guide tracks the footprint of EV charging networks globally, assessing the growth in charging points and how charging networks vary by region.

Benefits

- Understand the levels, complexity, and maturity of EV charging infrastructure eco-systems by region
- Understand the strengths and weaknesses of different charging operators
- Plan charging network partnerships that deliver the optimal charging experience for your customers
- Review business models being adopted by different charging networks
- Landscape analysis of OEM investment in proprietary charging networks, where and how
- Detailed data on the growth of charging providers, their networks and how efficiently they are distributed

Contents



>36,000 datapoints

93+ CPOs, 52 Regions

Dashboards, Ranking, and more

XLS Data

Geography Data
Statistical and demographic data by geography, charging types, network size

Operator Dashboard
Pre-built dashboard showing charging point operator competitiveness

Geography Dashboard
Pre-built dashboard allowing users to build their own queries and side by side comparisons between each geographic region

Ranking
A data-based scoring of CPOs

Definitions
Detailed feature definitions and common questions

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Key questions answered in this report and chapter overviews

Executive Summary
High-level abstracted summary of the EV charging & infrastructure trends

CPO & Geography Ranking
CPO & geography ranking based on coverage and charging

What's New?
Trends of automakers providing charging solutions with lower initial prices and establishing partnerships to improve the EV ownership experience

Analysis
Charging infrastructure considered in the report, their related business models, and pricing trends

Charging Operator Summary Tables
Summation of the CPOs identified in the associated Excel spreadsheet

Electrification Bird's Eye View
Key headlines from reports within the Electrification Domain Pass

Future Outlook
Future-looking benefits for Electrification services/ strategies

Next Steps
SBD advises on the so what and action to take as a reader

Useful Links:
Sample / Latest Edition

Markets Covered:
USA **Europe** China

Release /Update Timing
Q1 **Q2** Q3 **Q4**

Languages available
English **Japanese** Chinese

Electrification

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EV & Sustainability Legislation Tracker

Report Focus

How and where legislation is impacting electrification in the automotive industry

Introduction

The EV & Sustainability Legislation Tracker provides in-depth analysis of how and where legislation is impacting electrification in the automotive industry. In doing so, it helps OEMs and lawmakers understand the regulations and incentives surrounding EVs and sustainability today, as well as the developing legislation that will shape their regulatory future in different regions. This report is released quarterly to provide the latest updates and offers an accompanying Excel version with deep, data-driven, analysis.

Benefits

- Understand the legislation working in different regions and across the globe that will impact electrification and sustainability
- Identify the latest updates in developing legislation
- Focus on the most significant regional and global legislation/mandates through the report's 'Global Summary' section
- Gain insight into new and existing legislation:
    - Europe (examples): Alternative Fuels Infrastructure Regulation (AFIR), Green Deal and Fit for 55, VAT and Weight Tax, UK Vehicle Excise Duty
    - USA (examples): Inflation Reduction Act (IRA), Infrastructure Investment and Jobs Act (IIJA) of 2021, California Air Resources Board (CARB
    - China (examples): license plate lottery/quotas policy, "Fourteenth Five Year Plan" for emissions reduction, manufacturer

Contents



>10,000 datapoints

Regulations, Legislations, Standards, Guidelines and Best Practices, and more

XLS Data

Raw Data Sheet
Detailed data for relevant regulations, incentives, guidelines and best practices across each region

Change Tracker Sheet
Filterable list of changes from previous versions

Interactive Dashboard
Pivot table allowing users to build their own summary tables

Map Sheet
Maps showing the status of selected regulation types across regions

Related News
Related news by region, including descriptions of, and links to, news stories

Definitions
Detailed definitions of various types of regulations

PPT Insights

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Key questions answered in this report and chapter overviews

Executive Summary
A high-level overview of key regulatory activities in the EV space

The Basics
Classifications of different types of regulatory initiatives and market incentives

Analysis
Some major, important, and new announcements about policy activities

Summary Tables
Summaries of the various regulations, legislations, guidelines, and policies from the associated Excel spreadsheet in terms of their legal status and latest activities

Legislation Bird's Eye View
Key headlines from reports within the Legislation Domain Pass

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SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 **Q2** **Q3** **Q4**

Languages available

English **Japanese** Chinese

Electrification

219-

EV Battery Technologies Guide

Report Focus

Key players, technologies and ecosystem, including the factors encouraging innovation across the battery lifecycle

Introduction

As electric vehicles continue to proliferate globally, OEMs are racing to improve their efficiency, range and, of course, their bottom line. With the battery employing cutting-edge technologies, and representing the most expensive component of an EV, battery systems continue to be a focal point for innovation and investment across the automotive industry.

Building upon SBD's 2024 EV Battery Technologies & Ecosystem report, the 2025 edition has scaled into a data-rich industry guide covering automaker strategies for leveraging key battery technologies. The guide similarly understands how OEMs are leveraging both their partners and the emerging upstream and downstream battery ecosystems as part of their overall end-to-end electrification strategy, while defining critical battery technologies.

Benefits

- Understand the strategy and competitive position of various global automakers and how they are each pursuing an EV battery value proposition
- Identify existing and emerging suppliers as well as the battery start-ups partnering with OEMs
- Prioritize which technologies and companies are worth paying attention to, and which are less likely to be a transformative force
- Understand which players are unlocking true innovation in the battery reuse and recycling industry

Contents



- >3,000 datapoints
- 37+ OEMs covered
- Dashboards, Ranking, and more

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Model-level data on EV batteries, including technology, chemistry, packaging, & special features

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Comparison tabs by OEM/model

Executive Summary

Summary tables for the number of battery chemistries offered by OEM, etc.

Ranking

A data-based scoring of OEMs

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Highlighting the main trends within the report

What's New?

Summary of EV battery partnerships, eco-system, and major changes

Analysis

A review of the EV battery industry technology trends, battery chemistries, drivers, financial figures

Summary

Overview of the EV battery industry with a look at the future leading to 2030, financial figures, and market drivers

Electrification Bird's Eye View

Key headlines from reports within the Electrification Domain Pass

Future Outlook

Future-looking benefits for Electrification services/ strategies

Next Steps

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Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 **Q2** Q3 Q4

Languages available

English **Japanese** Chinese

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EV Digital Services & Features Guide

Report Focus

Digital tools and services for the EV user journey including remote and in-cabin EV digital experiences

Introduction

Electric vehicles rely on a multi-channel communications approach (incorporating smartphone apps, owner portals, and in-vehicle systems) to inform the (prospective) vehicle owner of EV features and services, battery status, charging availability, digital payments, and more broadly command/control of EV value-added services.

SBD's EV Digital Services & Features Guide provides an industry breakdown of how automakers are provisioning EV apps and a digital CX through five key steps - education, pre-purchase, purchase, post purchase and ownership - to increase EV consideration while ensuring owner awareness, support, and satisfaction throughout the purchase and ownership experiences.

Benefits

- Benchmark and ensure your competitiveness as you better understand each OEM's end-to-end digital experience for EV information and services
- Leverage an expert framework to identify potential areas of digital innovation along a consistent five-step journey mapped by SBD experts
- Gain insights into how digital tools and services can convince weary consumers on the benefits of EVs and reduce anxiety/barriers to adoption
- Identify best practices for digitizing key components of the EV user journey
- Prioritize new EV features and capabilities for your next-generation EV app or infotainment head-unit

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Model-level tech/feature/pricing data

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Dedicated view highlighting changes vs. previous release

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Tool allowing users to build own their queries and side by side comparisons

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A data-based scoring of CPOs

Dashboard
Pre-built dashboard showing OEM competitiveness

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Detailed feature definitions and common questions

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Goal / How to use this Guide / Last Update

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Main points of the report

What's New?
Summary of new offering & major changes

Analysis
Quantitative and qualitative deep dive on key trends and market direction

Summary Tables
Brand-level summaries of features/technologies offered

Electrification Bird's Eye View
Key headlines from reports within the Electrification Domain Pass

Future Outlook
Future-looking benefits for Electrification services/ strategies

Next Steps
SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 **Q3** Q4

Languages available

English **Japanese** Chinese

Electrification

224-

HEMS, V2G & Future of Smart Vehicle Charging Guide

Report Focus

Home energy management, plug & charge, battery swapping, wireless charging, robotic charging

Introduction

Electric vehicles are not only a critical user of electric power from homes, charging networks, and energy grids but are rapidly being designed to enable bi-directional power distribution back to buildings, homes, other EVs, utility providers, and a broad spectrum of energy providers overall.

In this new guide, SBD's experts break down the numerous opportunities and challenges presented by bi-directional charging, including vehicle enablement, integration with Home Energy Management Systems (HEMs). The guide also explores how bi-directional charging will facilitate virtual power plants and enable new collaborations with energy and infrastructure players.

Benefits

- Track the adoption of EV bi-directional pilots, commercial announcements and their competitive implications for enabling new experiences and value exchange between OEMs, vehicle owners, and third parties
- Identify the changes to vehicle charging standards and compatibilities required to provide a seamless bi-directional service experience
- Track emerging commercial contracts and business models
- Pinpoint opportunities to play a direct role in the bi-directional charging value chain

Contents



- **>10,000 datapoints**
- **35+ OEMs covered**
- **V2G/HEMS Hardware & Software covered**

XLS Data

Vehicle Tracker

Includes vehicle details, bi-directional charging, specifications & requirements

Functionality & Apps

V2G functionality and apps

Executive Summary

Main points of the data sheet

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Pre-built dashboard showing OEM competitiveness

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A data-based scoring of various bi-directional charging solutions

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Highlighting the main trends within the report

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Basics and energy management technology classifications

What's New?

Summary of new offering and major changes

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Quantitative and qualitative deep dive on key trends and market direction

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Brand-level summaries of features/technologies offered

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Key headlines from reports within the Electrification Domain Pass

Future Outlook

Future-looking benefits for Electrification services/ strategies

Next Steps

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 Q3 **Q4**

Languages available

English **Japanese** Chinese

Electrification

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EV Incentives Tracker

Report Focus

Covers EV incentives across 20+ categories from vehicle purchase, charging infrastructure set up to battery recycling/2nd life.

Introduction

The EV Incentives Tracker provides in-depth analysis of the incentives that are presently impacting electrification across the automotive industry. In doing so, it helps OEMs and dealerships understand the incentives being offered for EVs today, and the developing trends around incentives that are impacting their customers' buying decisions in different regions. This report is released quarterly to provide the latest updates and offers an accompanying Excel version with deep, data-driven, analysis.

Benefits

- Compare the incentives being offered in different regions and across the globe that will impact electrification
- Identify the latest updates on new trends around these incentives
- Support marketing campaigns on EVs by highlighting the most significant changes that have occurred and their potential impacts on consumer purchasing decisions

Incentive Types Covered:

EV purchase	Tax exemption	Renewable energy usage
Emissions	OEM incentives	End-of-life
EV parking regulations	Usage incentives	Battery handling
EV manufacture	Procurement & supply EV components	EV charger
Safety requirements		Battery manufacturing
Charging infrastructure	Vehicle purchase incentives	Charging infrastructure
ZEV deployment	Ownership	Usage
Company car incentives	Battery handling	Registration fee
Consumer fees/registration		

Contents



XLS Data

Raw Data Sheet

Region-level data on EV incentives, including policy type, incentives/disincentives, areas of application

What's New

A change summary has been provided to clearly show which incentives have been added

Change Tracker Sheet

Filterable list of changes from previous versions

Interactive Dashboard

Pivot table allowing users to build their own summary tables

Models Affected & Website Links

List of topics on which incentives are rolled out

Definitions

Detailed feature definitions and common questions

PPT Insights

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Key questions answered in this report and chapter overviews

Executive Summary

Highlighting the main trends within the report

The Basics

Introduction to the history of, and trends surrounding, EV incentives

What's New?

What types of incentives are being rolled out

Summary Tables

Summaries of the various regulations, legislations, guidelines, and policies from the associated Excel spreadsheet in terms of their legal status and latest activities

Legislation Bird's Eye View

Key headlines from reports within the Legislation Domain Pass

Next Steps

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 **Q2** **Q3** **Q4**

Languages available

English **Japanese** Chinese

Electrification

623-
EV Guide

Report Focus
Electric vehicle ecosystem, major players, disruption, EV sales.

Introduction
With OEMs rapidly launching new EV models, governments forming new EV policies, and startups exploiting new business models, staying up to date on EV activity has never been more important, and more difficult.

SBD's EV Guide provides insight into current EV specifications, their features, charging infrastructure, as well as their environmental impact and policy considerations for them. The guide offers comprehensive insights into the evolving electric vehicle ecosystem and its major players in the US, EU, and China markets.

Benefits
- Understand the latest market disruptors and see the correlation between government policies, EV sales volumes, and regional environmental impact
- Stay up to date on the latest vehicles, most promising start-ups, and newest technologies
- Efficiently compare up-to-date OEM mass produced passenger and light commercial EV specifications in PowerPoint and Excel formats
- Understand the charging infrastructure industry, who the leaders are, and the technologies supporting it
- See how in-vehicle interfaces support the EV user experience

Contents



- **>10,000 datapoints**
- **>45+ OEMs & 200+ EV models**
- **Market Details, Announcements, Ranking, Ecosystem, and more**

XLS Data

Raw Data Sheet
Model-level data on EVs, including technology, charging data, pricing, special features, and more

Market Dashboard
Dashboard to view EV sales by region and year

Executive Summary
Pivot table allowing users to build their own summary tables

Ranking
Data-based ranking of OEMs

OEM Partnerships & Segments
Partnerships by company and region, as well as industry segments

PPT Insights

Introduction
Key questions answered in this report and chapter overviews

Executive Summary
A high-level overview of the EV industry across the regions covered by the report

The Basics
Defining some key aspects of the EV Guide

What's New?
Trends through the lens of the EV market – such as the latest technologies boosting EV sales, new models introduced, notable announcements, new acquisitions and partnerships

Analysis
Data-driven trends identified in the associated Excel spreadsheet answering specific questions on EV features, model-level penetration, and more

Market Summary
A summary of EV market trends across 32 European countries

Vehicle Summaries
A summary of automakers based on the specifications of their electric vehicle models

Focus on Technology
Identifying the different technologies being deployed across the electric vehicle market

Electrification Bird's Eye View
Key headlines from reports within the Electrification Domain Pass

Future Outlook
Future-looking benefits for Electrification services/ strategies

Next Steps
SBD advises on the so what and action to take as a reader

Useful Links:
Sample / Latest Edition

Markets Covered:
USA **Europe** **China** Global

Release /Update Timing
Q1 Q2 **Q3** Q4

Languages available
English **Japanese** Chinese

ADAS & Autonomy Reports

534-

ADAS & Autonomy Guide

Report Focus

Sensor technology, artificial intelligence, and data processing for active safety features

Introduction

With a growing number of manufacturers relying on Advanced Driver Assistance Systems (ADAS), it has become increasingly difficult to accurately track competitors and differentiate between brands. With more advancements in sensor technology, artificial intelligence, and data processing than ever before, OEMs are now being challenged to offer a wide range of active safety features at an affordable price

The ADAS Guide represents the reference and planning baseline to track ADAS technologies and assess their overall competitiveness across every major brand in the market. Covering more than 17 distinct ADAS systems deployed in the market, it also compares these features on several verticals - including their availability and pricing models - and dispels the jargon used by OEMs to describe them.

Benefits

- One master source for checking ADAS offerings across three main regions
- Over 300 individual vehicle models covered annually
- Identify which OEMs (and in which carlines) are fitting ADAS just to meet regulation or NCAP requirements, and which ones are providing advanced assistance or L2-to-L3 systems
- Compare offerings by convenient Excel data and concise summaries

Contents



XLS Data

Raw Data Sheet
Model-level ADAS tech/feature/pricing data

Query Builder
Tool allowing users to build their own queries and side by side comparisons

Dashboard
Pre-built dashboard showing OEM competitiveness

Definitions
Detailed feature definitions and common questions

Ranking
A data-based scoring of various bi-directional charging solutions

PPT Insights

Introduction
What is the ADAS Guide all about?

Executive Summary
High-level abstracted summary of the latest ADAS trends

The Basics
Introduction to the essentials of ADAS

What's New?
Latest news, product launches and case study in the ADAS/AV space

Analysis
ADAS trends identified in the associated Excel spreadsheet, as well as overviews of the most popular ADAS, OEM market leaders, pricing strategy and much more

Summary Tables
Summarizing the ADAS trends in terms of single sensor and sensor fusion offerings by OEM brands (with their pricing points)

ADAS & Autonomy Bird's Eye View
Brief overview of the key concepts in automotive ADAS & Autonomy Domain Pass

Future Outlook
Future-looking benefits for ADAS & Autonomy services/ strategies

Next Steps
SBD advises on the so what and action to take as a reader

Useful Links:
Sample / Latest Edition

Markets Covered:
USA **Europe** **China** Global

Release /Update Timing
Q1 **Q2** Q3 Q4

Languages available
English **Japanese** Chinese

ADAS & Autonomy

535-

Autonomous Car Legislation Tracker

Report Focus

Legislation and regulatory impact of active safety systems, threats and opportunities generated by government mandates, incentives, standards

Introduction

SBD's Autonomous Car Legislation Tracker provides timely, quarterly, coverage of how and where legislation is impacting active safety systems in Europe, the USA, and China.

Here, it identifies the threats, implications and opportunities generated by government mandates, regulations, incentives, best practices, and standards, as well as other regional and country regulations with in-depth analysis of how and where legislation is impacting safety systems

Benefits

- Understand the legislation applicable in different regions and across the globe that will impact ADAS and autonomous vehicle technology deployments
- Identify the latest updates in developing legislation
- Focus on the most significant regional and global legislation and mandates
- Gain insight into the impact of new and existing ADAS legislation on vehicle manufacturers and Tier 1 suppliers

Contents



>10,000 datapoints

Regulations, Legislations, Standards, Guidelines, Best Practices, and more

XLS Data

Raw Data Sheet

Detailed data for relevant regulations, incentives, guidelines, and best practices across each region

Executive Summary

Summary of active policies, their status, and more

Dashboard

Pivot table allowing users to build their own summary tables

Related News

Related news filtered by region including descriptions and links

Definitions

Detailed definitions of various types of regulations

PPT Insights

Introduction

Key questions answered in this report and chapter overviews

Executive Summary

A high-level overview of key regulatory activities in the autonomous car space

The Basics

A brief description of legal terminologies covered across this report

Analysis

Key highlights and major announcements around new policy activities for ADAS

Summary Tables

Summarizing the various regulations, legislations, guidelines, and policies in the associated Excel spreadsheet in terms of their legal status and latest activities

Legislation Bird's Eye View

Brief overview of the key concepts in automotive Legislation Domain Pass

Next Steps

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 **Q2** **Q3** **Q4**

Languages available

English **Japanese** Chinese

538-

ADAS & Autonomy Forecast 2027-2037

Report Focus

2035 view of differences in penetration for L0 to L3 ADAS and the technologies supporting these features

Introduction

As L4 autonomy takes longer to become a commercial reality, the focus among many OEMs has shifted to expanding the availability of lower levels of autonomy (L1/L2) and stretching the functionality of their existing ADAS systems (L2+/L3).

This forecast analyses the growth of ADAS features on passenger vehicles across the USA, Europe and China. Here, it works closely with the 18 ADAS systems covered in SBD's ADAS Guide (534), and accurately projects volumes and penetration rates by major vehicle manufacturers.

Benefits

- Build ADAS strategies based on a granular, bottom-up, forecast by features, region and OEM
- Right-size your ADAS strategies according to target segments and regions
- Check competitive gaps for assessing new ADAS system introductions
- Track OEM ADAS strategies, their SAE levels, and their implementation of LIDAR, camera, and radar sensors.
- Provides a forward-looking view of our ranking in guides to provide a similar view 10 years into the future.

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XLS Data

Forecast Data Sheet

Brand/technology-level ADAS forecast

Features by OEM

ADAS features by OEM

Technologies by OEM

ADAS technologies by OEM

Ranking

Data-based ranking of OEMs

Definitions

Detailed feature definitions and common questions

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Introduction

Key questions answered in this report and chapter overviews

Exec Summary

Key conclusions and high-level forecasts/changes

What's New?

Summary of what's changed from previous forecast

Feature Trends

Analysis of forecast of feature penetration for each feature in the market, as well as drivers and barriers

OEM Trends

Analysis overview of the OEM in terms of their autonomy offering and supporting sensors

ADAS & Autonomy Bird's Eye View

Brief overview of the key concepts in automotive ADAS & Autonomy Domain Pass

Next Steps

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global** Excl. China

Release /Update Timing

Q1 Q2 Q3 **Q4**

Languages available

English **Japanese** Chinese

816-

Autonomous Strategies & Ecosystem Players Deep Dive

Report Focus

ADAS and autonomous vehicle players, technology providers, innovations, and industry strategies.

Introduction

The shift towards autonomous technology already impacting the automotive industry and will continue to do so until it arrives. Understanding its Eco-system today can give OEMs the upper hand when this happens. This report examines this Eco-system thoroughly, detailing the autonomous strategies of major OEMs and the key partnerships within it. Its scope extends further to highlight the technologies and regulations at the center of vehicle autonomy as well as the latest initiatives within the sector.

Benefits

- Understand the different levels of autonomy and the key technology domains.
- Understand the market land scape of the core technologies on the sensors powering the autonomy.
- Global OEM activities & impacts. How advanced driving assistant and autonomy are transforming OEM businesses, as well as changing their partnerships, investments, platforms and organizations.
- Supply chain activities and impacts: How tier 1s, tier 2s and service providers support the implementation of autonomous vehicle technology.

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PPT **Insights**

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Goal / How to use this Deep Dive / Last update

Executive Summary
Main points of the report

Analysis
Key trends across stakeholders in the domain

OEM Profiles
Brand-level summaries of the functions enabled by their product and service solutions.

Supply Base Profiles
Brand-level summaries of the functions enabled by their product and service solutions.

Consumer Service and Retail Profiles
Brand-level summaries of the functions enabled by their product and service solutions.

Wider Ecosystem Profiles
Brand-level summaries of the functions enabled by their product and service solutions.

ADAS & Autonomy Bird's Eye View
Brief overview of the key concepts in automotive ADAS & Autonomy Domain Pass

Future Outlook
Future-looking benefits for ADAS & Autonomy services/ strategies

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SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 Q3 Q4

Languages available

English **Japanese** Chinese

ADAS & Autonomy

815-

L4 Autonomy Forecast

Introduction

Mobility services around the world are expected to benefit greatly from L4 autonomy. However, a variety of legal, technical, and commercial obstacles must be overcome by service operators. SBD's L4 Autonomy Forecast report delivers a grounded, data-driven, forecast and comprehensive insights into the expected growth of AVs and L4 services by segment and region. It also details key deployment strategies across the market, helping service operators plan and map out their own L4 strategies across different regions and segments.

Benefits

- This report mainly focuses on three regions which are dominating this sector (USA, Europe and China), analyzing the technical, regulatory, user acceptance and commercial factors for major segments. Some other notable regions and technology trends are also included in the report
- The forecast assumptions are grounded, hype-free and data-driven covering L4 vehicles/services, enabling users to plan their own L4 strategies with confidence
- Ability to pinpoint specific segments within L4 autonomy that will generate the highest opportunity in the short, mid and long-term

Contents



- >640 datapoints
- All major segments
- Dashboard

XLS Data

Forecast Data Sheet

Brand/Country/Service-level L4 forecast

Change Tracker Sheet

Filterable list of changes from previous versions

Query Builder

Pivot table allowing users to build own summary tables

Definitions

Detailed feature definitions and common questions

PPT Insights

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Goal / How to use this Forecast

Exec Summary

Key conclusions and high-level forecasts/changes

Segment Trends

Analysis of key trends broken down by L4 segments (e.g. robotaxis, shuttles, etc.)

Technology Trends

Analysis of key trends broken down by L4 technology

Regional Trends

Analysis of regional drivers / barriers for L4 adoption and expected growth rate

ADAS & Autonomy Bird's Eye View

Brief overview of the key concepts in automotive ADAS & Autonomy Domain Pass

Next Steps

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Mar-2024

Languages available

English **Japanese** Chinese

817 –

Localization & Map-based ADAS

Introduction

OEMs are overlaying map and localization information onto other on-board sensors t907o optimize existing systems and deliver more refined functionality.

Though SAE levels outline a path to automation, the actual route for OEMs and their teams is unclear. Higher automation requires more hardware and redundancy, which raises costs. At lower levels, the driver can act as redundancy, but at “hands off, eyes off” levels this is not possible.
High-definition maps and map-based ADAS are viewed by some as critical technologies for autonomy. These maps provide 3D environmental data, such as lanes, traffic furniture, and road elevation, and OEMs already use them to enhance ADAS.
Maps can supplement on-board sensing systems like cameras and radar, which feed data to a central computer to locate the vehicle. However, sensing systems face noise from clutter, blur, weather, and lighting. Developing robust detection of objects such as traffic signs and markings remains challenging, especially in urban areas.

This report presents use cases and recommendations for deploying localization and map-based ADAS.

Benefits

- Gain a clear and grounded understanding of how localization is likely to evolve in the automotive industry
- Understand all the factors that are likely to influence the growth of localization features and services
- Gain insights into benefits of maps for ADAS use cases
- Track profiles of significant players active in localization for ADAS

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Goal / Overview of report contents / How to use this report

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Main points from the report

Localization systems
Overview of various map levels (Standard, Mid, High Definition) and how they support localization

Regional Differentiations
What is being implemented by region to address specific local challenges and technical requirements

Use cases
What are the main use cases where localization brings actual vehicle, business, or consumer value

Eco-system
Analysis of OEMs and suppliers supporting localization and new potential entrants

Market Outlook
ADAS sensor roadmap for localization and 5-year forecast for adoption

Recommendations
Stakeholder-specific recommendations on how to succeed at map and localization information

Go Deeper
Outline of additional data sources & potential projects relating to localization and map information

ADAS & Autonomy Bird’s Eye View
Brief overview of the key concepts in automotive ADAS & Autonomy Domain Pass

Future Outlook
Future-looking benefits for ADAS & Autonomy services/ strategies

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SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Dec. 2023

Languages available

English **Japanese** Chinese

Security Reports

Security

539-

Cyber & SDV Legislation Tracker

Report Focus

Cybersecurity legislation, best practice guidelines and technical standards that impact in-car and off-board systems

Introduction

SBD's Automotive Cyber & SDV Security Legislation Tracker identifies the threats and opportunities generated by government mandates, guidelines, and standards within Europe, the USA, and China as well as further major markets around the world.

It offers a usable, comprehensive, reference tool that allows you to confidently focus your attention on the issues that matter most. Here, the report maps out both the background and timeline of each piece of cyber security legislation, while highlighting best practices, standards, and their implications to strengthen your cyber security strategy.

Benefits

- Monitor regulatory changes across various regions by referring to a quarterly monitoring report vs. having to check disparate, and complex, legislative sources
- Gain insights into the impact of new and existing legislation and mandates surrounding the automotive cyber security landscape
- Receive quarterly alerts on changes and updates

Contents



>10,000 datapoints

Regulations, Legislations, Standards, Guidelines and Best Practices, and more

XLS Data

Raw Data Sheet

Detailed data for relevant regulations, incentives, guidelines & best practices across each region

Executive Summary

Summary of active policies, status etc.

Dashboard

Pivot table allowing users to build their own summary tables

Related News

Related news filtered by region, including description and links

Definitions

Detailed definitions of various types of regulations

PPT Insights

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Key questions answered in this report and chapter overviews

Executive Summary

A high-level overview of key regulatory activities in the automotive cybersecurity space

The Basics

A brief description of legal terminologies covered in this report

Analysis

Some major, important and new announcements about policy activities

Summary Tables

Summarizing the various regulations, legislations, guidelines, and policies detailed in the associated Excel spreadsheet in terms of their legal status and latest activities

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Brief overview of the key concepts in automotive Legislation Domain Pass

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SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 **Q2** **Q3** **Q4**

Languages available

English **Japanese** Chinese

Security

554-
E-Theft Threat Guide

Report Focus
Methods in vehicle theft, theft tools and devices including their functionality, compatibility, and availability

Introduction
The E-Theft Threat Guide identifies the range of methods that play a role in the theft of vehicles today. Contemporary theft tools and devices are extensively profiled, with insights into their source, cost, and the types of theft they enable.

This guide is a fully searchable reference tool, and a catalog of the various theft devices available designed to overcome standard-fit security systems. Its Excel counterpart offers a comprehensive list of current devices, what they are designed to do, what the seller claims they can do, and the cost of each one. The spreadsheet lists the vehicle brands, models and (where possible) the model year that each device claims to overcome or program.

Benefits
- The guide is designed to help engineers, designers, investigators and strategists better understand the type and breadth of tools and devices currently available and being used to overcome vehicle security systems
- The tools listed can either bypass systems, program keys/ECUs, re-write commands or data, or re-flash vehicle firmware
- Track real-world theft methods that can have an impact on the desirability or insurability of vehicles
- Prioritize anti-theft measures by focusing on the highest-impact tools
- Improve your brand's insurability and customer satisfaction protecting against emerging threats

Contents



- **>10,000 datapoints**
- **>290 tool details covered**
- **Models affected & website links**

XLS Data

Raw Data Sheet

Brand-level data on e-theft tools, including cost, type, availability, and compatibility

What's New

A change summary has been provided to clearly show which new tools have been added

Models Affected & Website Links

List of affected models and links to websites

Definitions

Detailed feature definitions and common questions

PPT Insights

SBD selection of ten latest tools and analysis to aid understanding and context to the excel database

Introduction

Key questions answered in this report and chapter overviews

The Basics

Introduction to the history and the demand for this type of tool

What's New?

What are the latest tools?

Security Bird's Eye View

Brief overview of the key concepts in automotive Security Domain Pass

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Future-looking benefits for services/strategies against e-theft

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SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 **Q2** Q3 Q4

Languages available

English **Japanese** Chinese

Security

905- Cyber Intelligence Guide

Report Focus
Public white and black-hat attacks, technical analysis of threat actors' methods, proposed mitigations

Introduction
If a vehicle's computer systems aren't properly protected, malicious adversaries can steal data or even take control of the vehicle. This makes automotive cyber security a major concern for consumers, auto companies, and OEMs alike.

SBD's Cyber Security Intelligence Guide has been designed to analyze and raise awareness on the diverse threats and vulnerabilities that affect vehicles, as well as connected and autonomous vehicle systems. At the same time, this report works to promote a positive security culture within OEMs, suppliers and other key players - offering insights into the recommended defense and mitigation countermeasures while highlighting the importance of incident response analysis within the industry and deeply analyzing attack methodologies as part of a broader threat analysis.

Benefits
- Foster a positive security culture within your business
- Gain thorough insights into the recommended defense and mitigation countermeasures
- Highlight the importance of incident response analysis within the industry
- Provide an input into the threat monitoring process mandated by UNECE R155

Contents



- >5,000 datapoints
- 50+ companies covered

XLS Data

Raw Data Sheet

Database of vulnerabilities, including source, type and vehicle systems affected

Threat Database

A data-based list of threats, including damage and threat scenario

Dashboard

Dashboard showing attack types and characteristics

Definitions

Detailed feature definitions and common questions

PPT Insights

Introduction

The purpose and scope of this report, as well as a breakdown of its methodology

Executive Summary

A breakdown of the latest automotive industry hacking trends

Vehicle Attacks

Analysis of attacks associated with the vehicle's internal network and automotive applications

Backend and Smartphone Attacks

Analysis of attacks associated with the backend and other off-board systems

Extended Automotive Ecosystem Attacks

Analysis of attacks associated with OEM organizations and the automotive supply chain

Security Bird's Eye View

Brief overview of the key concepts in automotive Security Domain Pass

Future Outlook

Future-looking benefits for services/strategies against e-theft

Next Steps

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 **Q3** Q4

Languages available

English **Japanese** Chinese

Security

907 -
Cyber Trends Guide

Report Focus
The new Cyber Trends Guide mirrors the existing Cyber Intelligence Guide to identify trends in key threats and outline mitigations being adopted within the industry, including definition, characterization and levels of implementation.

Introduction
With most OEMs sharing little publicly of their cyber-security implementation status and release plans, SBD Automotive's new Cyber Trends Guide takes an OEM persona approach to cut through the uncertainty and provide clarity on the types and penetration of solutions across segments, markets and OEM types.

Benefits
- Cut through the fear and hype with clear definitions of threats and mitigating solutions being rolled out in the industry
- Understand the types of roll out strategies being adopted and how they vary
- Use the Cyber Trends Guide as a set of clear data points to aid you in product planning and roll out plans

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Goal / How to use this Guide

Executive Summary
Key report takeaways and actions

The Basics
Introduction to the essentials of the state of the art of solution within Cyber-security

What's New?
Summary of new announcements & major changes

Analysis
Quantitative and qualitative deep dive on key trends and market direction

Deep Dive
Threat & Mitigation analysis, and profile-based adoption trends

Security Bird's Eye View
Brief overview of the key concepts in automotive Security Domain Pass

Future Outlook
Future-looking benefits for services/strategies against e-theft

Next Steps
SBD advises on the so what and action to take as a reader

Markets Covered:
USA Europe China **Global**

Release /Update Timing
Q1 Q2 **Q3** Q4

Languages available
English **Japanese** Chinese

User Experience Reports

User Experience

635-

Automotive UX Evaluation

9 individual vehicle reports + 1 summary report assessing the features, execution and perceived quality of UX.

Report Focus

Expert analysis and ranking based on vehicle UX evaluation of infotainment, navigation, ADAS & autonomy domains.

Introduction

With new technologies, features, and services being integrated into vehicles faster than ever before, the consumer user experience now represents a critical element that can ensure a successful product launch and overall usability, as well as long-term satisfaction and loyalty with the vehicle and its digital services.

In this industry-leading report series, we provide a comprehensive, expert, evaluation of the most innovative vehicles launched in the USA, EU, and China. For 2026, our experts will review nine vehicles – with one detailed UX report created for each vehicle – while a yearly summary highlights key comparisons and best practices. Product planners, engineers, and UX/HMI experts alike can leverage SBD's testing methodology and hands-on results to compare their solutions across vehicle segments and markets.

Benefits

- Standard methodology used to test vehicles that allows comparisons across markets and segments
- Vehicle ranking in terms of functionality and UX
- Main features analysis based on Kano model implemented
- Recommendations to enhance customer experiences
- A consumer-experience outlook on the future of automotive UX
- New Birds Eye View chapter with macro level summary, and new Future Outlook chapter with a forward roadmap to achieve the CX principles

Contents



Vehicle list (subject to change based on availability and market interest)

Vehicle	Purpose
BMW Neue Klasse iX3 or 3 series	Panoramic Vision head-up display across windscreen, minimalist cockpit with trapezoid touchscreen
Lucid Gravity	Grand Touring trim, AR HUD, immersive experience with different modes/themes offered and dynamic ambient lights, large 7-seater EV, large screen on dash and additional lower central display
DS N°8	16-inch floating touchscreen, AI voice control, 3D infotainment effects, interior light reacts to driving modes and emotions
Sony Honda Afeela 1	First car from Sony together with Honda, full-width panoramic dash display, AI-driven Afeela Personal Agent with natural voice chat and proactive suggestions

PPT

Insights

Introduction
The purpose, scope and methodology followed in this report

Exec Summary
Key highlights and conclusions from the report

The Basics
What do you need to know about SBD's CX evaluation methodology?

Usability analysis
Analysis of report findings, success of implementation and overall execution of various system elements

Features & Functionality
Overview of key features and functionality by domain

Perceived quality
Scoring and analysis of interior perceived quality levels

Voice recognition domain
Summary and scoring of various aspects of the voice recognition system

General system domain
Highlights and analysis of key positive and negative points within the general system domain

Navigation domain
Highlights and analysis of key positive and negative points within the navigation domain

ADAS domain
Highlights and analysis of key positive and negative points within the ADAS domain

Infotainment domain
Highlights and analysis of key positive and negative points within the infotainment domain

Other UX domain
Highlights various features such as Exterior HMI

User Experience Bird's Eye View (in summary report)
An overview of the key findings from SBD's various CX-related and adjacent reports

Future Outlook (in summary report)
Seven UX principles are considered against drivers and barriers into the future of the report's test vehicle.

Next Steps (in summary report)
SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 **Q2** **Q3** **Q4**

Languages available

English **Japanese** Chinese

User Experience

645e-

Vehicle UX Best Practice: Robotaxis

Report Focus

Experience analysis of robotaxis highlighting case studies of disruptive solutions.

Introduction

The way in which key features are deployed in a car can have a significant impact on how consumers perceive them. As such, deploying them in a manner that facilitates a satisfactory user experience is crucial to ensuring successful vehicle launches and securing customer loyalty.

In 2024, SBD launched the 645 UX Enabling Tech Series to analyze the technology performance of various OEM aspects that have the biggest impacts on usability and the customer experience. The technologies selected for this series represent those that have highest impact on their end user experience and enable the biggest differentiation for brands.

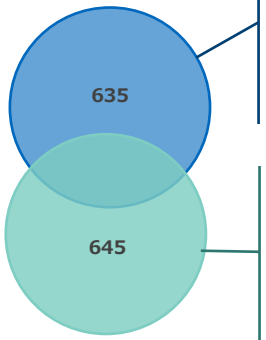
For 2026, a priority item is 'Robotaxis'. Utilizing previous robotaxi tests, more than 10 years of experience from our 635 Vehicle Evaluation Series, and the overall usability study based on secondary data, the report will highlight good and bad solutions from the automotive industry.

Benefits

- Deep case studies of each robotaxi experience backed by objective testing data and desk-based analysis
- Identify best practices and novel ways of delivering seamless user experiences across different use cases
- Evaluate the technical and functional differences in the implementation of the selected features across the vehicles
- Recommendations to enhance the customer experience for your own systems and technologies

Contents





Analysis of all **UX features, execution, perceived quality and domain analysis** part of a 9 selected vehicle series.

Parts E and F of our **detailed technology deep dive** cover **Robotaxi + UX and AI use cases** across the automotive landscape, **including - but not limited to - vehicles evaluated in our 635 Report Series**.

PPT

Insights

Introduction
The purpose, scope and methodology followed in this report

Exec Summary
- Key Takeaways
- Positive best practice examples
- Common system failure points
- Overview of established UX laws and UX guidelines

User Experience Principles
Explanation of every UX principle with Robotaxi related example

Best Practice Example
Best practice examples for every aspect of the Robotaxi user journey

Common failure points
Overview of common Robotaxi failure points

Rules and Guidelines
Outline of 13 UX laws that can assist in creating a sufficient in-vehicle infotainment and app solution.

User Experience Bird's Eye View
An overview of the key findings from SBD's various CX-related and adjacent reports

Future Outlook
Seven UX principles are considered against drivers and barriers into the future of the report's test vehicle.

Next Steps
SBD advises on the so what and action to take as a reader

Markets Covered:
USA Europe China **Global**

Release /Update Timing
Q1 **Q2** Q3 Q4

Languages available
English **Japanese** Chinese

User Experience

645f-

Vehicle UX Best Practice : AI Use Cases

Report Focus

Experience analysis of AI use cases highlighting case studies of disruptive solutions.

Introduction

The way in which key features are deployed in a car can have a significant impact on how consumers perceive them. As such, deploying them in a manner that facilitates a satisfactory user experience is crucial to ensuring successful vehicle launches and securing customer loyalty.

In 2024, SBD launched the 645 UX Enabling Tech Series to analyze the technology performance of various OEM aspects that have the biggest impacts on usability and the customer experience. The technologies selected for this series represent those that have highest impact on their end user experience and enable the biggest differentiation for brands.

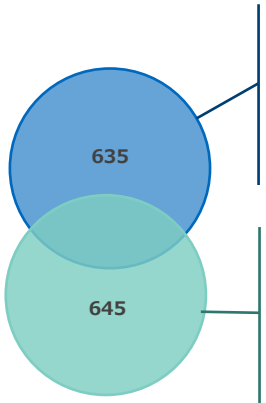
For 2026, a priority item is 'AI Use Cases'. Utilizing the vehicles tested in our 635 Vehicle Evaluation Series, other models SBD tested, the overall usability study based on secondary data, OEM announcements and event data, the report will highlight AI solutions and its impact on the user experience.

Benefits

- Deep case studies of each AI experience backed by objective testing data and secondary data
- Identify best practices and novel ways of delivering seamless user experiences across different use cases
- Evaluate the technical and functional differences in the implementation of the selected features across the vehicles
- Recommendations to enhance the customer experience for your own systems and technologies

Contents





Analysis of all **UX features, execution, perceived quality and domain analysis** part of a 9 selected vehicle series.

Parts E and F of our **detailed technology deep dive** cover **Robotaxi + UX and AI use cases** across the automotive landscape, **including - but not limited to - vehicles evaluated in our 635 Report Series**.

PPT

Insights

Introduction

The purpose, scope and methodology followed in this report

Exec Summary

- Key Takeaways
- Positive and Negative examples

Opportunities and Risk

Explanation of Opportunities but also Risks that comes with an AI integration

Best Practice Example and Trends

Best practice examples of AI solution on the market and current trends

Case Studies

Feature Case Studies

User Experience Bird's Eye View

An overview of the key findings from SBD's various CX-related and adjacent reports

Future Outlook

Seven UX principles are considered against drivers and barriers into the future of the report's test vehicle.

Next Steps

SBD advises on the so what and action to take as a reader

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 **Q3** Q4

Languages available

English **Japanese** Chinese

635-

Automotive UX Evaluation

9 individual vehicle reports + 1 summary report assessing the features, execution and perceived quality of UX.

Report Focus

Expert analysis and ranking based on vehicle UX evaluation of infotainment, navigation, ADAS & autonomy domains.

Introduction

With new technologies, features, and services being integrated into vehicles faster than ever before, the consumer user experience now represents a critical element that can ensure a successful product launch and overall usability, as well as long-term satisfaction and loyalty with the vehicle and its digital services.

In this industry-leading report series, we provide a comprehensive, expert, evaluation of the most innovative vehicles launched in the USA, EU, and China. For 2026, our experts will review nine vehicles – with one detailed UX report created for each vehicle – while a yearly summary highlights key comparisons and best practices. Product planners, engineers, and UX/HMI experts alike can leverage SBD's testing methodology and hands-on results to compare their solutions across vehicle segments and markets.

Benefits

- Standard methodology used to test vehicles that allows comparisons across markets and segments
- Vehicle ranking in terms of functionality and UX
- Main features analysis based on Kano model implemented
- Recommendations to enhance customer experiences
- A consumer-experience outlook on the future of automotive UX
- New Birds Eye View chapter with macro level summary, and new Future Outlook chapter with a forward roadmap to achieve the CX principles

Contents



Vehicle list (subject to change)

2025 Vehicle List
Volvo EX90
Cadillac Escalade IQ
NIO ET9
Renault 5 e-tech
Tesla Model Y (Juniper)
IM LS6 or L6
Lynk & Co 900
NIO Firefly
Mercedes-Benz CLA-Class

2024 Vehicle List
BMW X1
Mercedes-Benz E-Class
Xiaomi XU7
Lincoln Nautilus
Hyundai Kona Electric
Acura ZDX
Avatr 12
Audi Q6 e-tron
MINI Electric Countryman

PPT

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Introduction
The purpose, scope and methodology followed in this report

Exec Summary
Key highlights and conclusions from the report

The Basics
What do you need to know about SBD's CX evaluation methodology?

Usability analysis
Analysis of report findings, success of implementation and overall execution of various system elements

Features & Functionality
Overview of key features and functionality by domain

Perceived quality
Scoring and analysis of interior perceived quality levels

Voice recognition domain
Summary and scoring of various aspects of the voice recognition system

General system domain
Highlights and analysis of key positive and negative points within the general system domain

Navigation domain
Highlights and analysis of key positive and negative points within the navigation domain

ADAS domain
Highlights and analysis of key positive and negative points within the ADAS domain

Infotainment domain
Highlights and analysis of key positive and negative points within the infotainment domain

Other UX domain
Highlights various features such as Exterior HMI

User Experience Bird's Eye View (in summary report)
An overview of the key findings from SBD's various CX-related and adjacent reports

Future Outlook (in summary report)
Seven UX principles are considered against drivers and barriers into the future of the report's test vehicle.

Next Steps (in summary report)
SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Released

2024 **2025**

Languages available

English **Japanese** Chinese

645a-

Vehicle UX Best Practice : Companion Apps

Report Focus

Deep-dive in addition to 635 providing detail on implementation, differentiation & USPs of features

Introduction

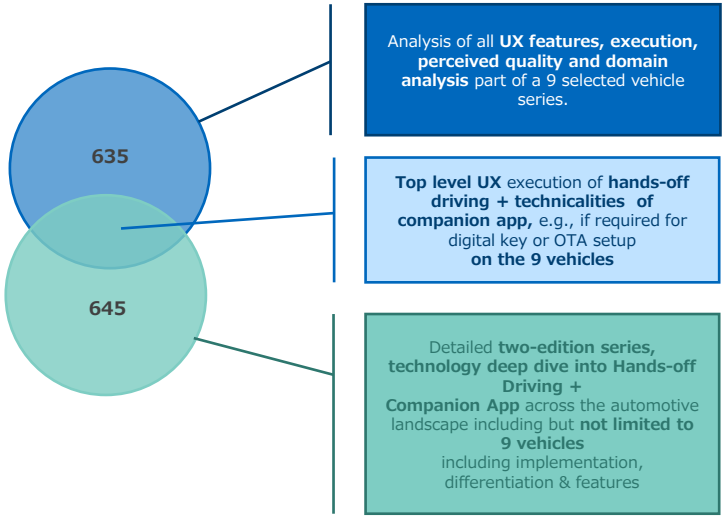
The way key features are deployed in a car can make a significant difference to enabling a satisfactory user experience. SBD usability experts will be performing a further deep-dive into testing the technology performance of OEM companion apps and hands-off driving systems utilizing the vehicle models from our 635 Vehicle Evaluation Series. For Companion Apps the report will highlight experiences on the phone as well as how it interacts with connected vehicle features. For Hands-off Driving, it will evaluate each model's system experience including implementation of warnings and monitor the driver's level of attentiveness.

Benefits

- Ranking of each companion app and hands-off experience backed by objective testing data.
- Identification of best practices and novel ways of delivering the experience across these technologies
- Recommendations to enhance the customer experience for your own systems and technologies

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Exec Summary

- Comparison of the tech on each vehicle tested
- Positive examples from vehicle testing
- Negative examples from vehicle testing

The Basics

A brief description of legal terminologies covered across this report

Usability Analysis

- Impact to OEMs due to tech adoption
- Considerations needed to be made by OEMs

Feature Analysis

- Description of the tech
- Images of the tech execution

Best Practices

Best practices adopted in different related contexts

User Experience Bird's Eye View

An overview of the key findings from SBD's various CX-related and adjacent reports

Future Outlook

Seven UX principles are considered against drivers and barriers into the future of the report's test vehicle.

Next Steps

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Dec. 2024

Languages available

English **Japanese** Chinese

645b-

Vehicle UX Best Practice: Hands-Off Driving

Report Focus

Deep-dive in addition to 635 providing detail on implementation, differentiation & USPs of features

Introduction

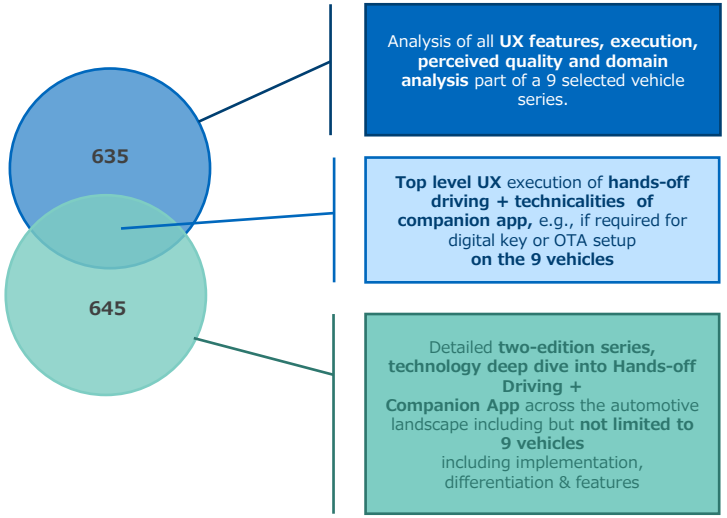
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- Comparison of the tech on each vehicle tested
- Positive examples from vehicle testing
- Negative examples from vehicle testing

The Basics
A brief description of legal terminologies covered across this report

UX Elements
UX overview including training education, support, retaining driver attention, etc.

Analysis
Description of the tech, highlights and key decision

Case Studies
Key case studies' review

User Experience Bird's Eye View
An overview of the key findings from SBD's various CX-related and adjacent reports

Future Outlook
Seven UX principles are considered against drivers and barriers into the future of the report's test vehicle.

Next Steps
SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Dec. 2024

Languages available

English **Japanese** Chinese

645c-

Vehicle UX Best Practice: Navigation for EVs

Report Focus

Experience analysis of EV navigation highlighting case studies of disruptive solutions

Introduction

The way in which key features are deployed in a car can have a significant impact on how consumers perceive them. As such, deploying them in a manner that facilitates a satisfactory user experience is crucial to ensuring successful vehicle launches and securing customer loyalty.

In 2024, SBD launched the 645 UX Enabling Tech Series to analyze the technology performance of various OEM aspects that have the biggest impacts on usability and the customer experience. The technologies selected for this series represent those that have highest impact on their end user experience and enable the biggest differentiation for brands.

For 2025, the priority item is 'Navigation for EVs'. Utilizing the vehicle models tested in our 635 Vehicle Evaluation Series, other models we have tested, and the overall usability study based on secondary data, the report will highlight the best user experiences offered by EV navigation systems and understand how they interact with the EV's connected features.

Benefits

- Deep case studies of each navigation experience backed by objective testing data
- Identify best practices and novel ways of delivering seamless user experiences across different use cases
- Evaluate the technical and functional differences in the implementation of the selected features across the vehicles
- Recommendations to enhance the customer experience for your own systems and technologies

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- Positive examples from vehicle testing
- Negative examples from vehicle testing

The Basics
A brief description of legal terminologies covered across this report

Methodology
Overview of methodology and report structure

Analysis
- Impact to OEMs due to tech adoption
- Considerations needed to be made by OEMs

Car-by-car Summary
- Description of EV navigation technologies
- Images of the technology in use

User Experience Bird's Eye View
An overview of the key findings from SBD's various CX-related and adjacent reports

Future Outlook
Seven UX principles are considered against drivers and barriers into the future of the report's test vehicle.

Next Steps
SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 Q3 **Q4**

Languages available

English **Japanese** Chinese

645d-

Vehicle UX Best Practice: Public Charging for EVs

Report Focus

Experience analysis of EV public charging services highlighting case studies of disruptive solutions

Introduction

The way in which key features are deployed in a car can have a significant impact on how consumers perceive them. As such, deploying them in a manner that facilitates a satisfactory user experience is crucial to ensuring successful vehicle launches and securing customer loyalty.

In 2024, SBD launched the 645 UX Enabling Tech Series to testing the technology performance of various OEM aspects that have the biggest impacts on usability and the customer experience. The technologies selected for this series represent those that have highest impact on their end user experience and enable the biggest differentiation for brands.

For 2025, the priority item is 'Public Charging for EVs'. Utilizing the vehicle models tested in our 635 Vehicle Evaluation Series, other models we have tested, and the overall usability study based on secondary data, the report will highlight the best user experiences offered by EV charging service and understand how they interact with the EV's connected features.

Benefits

- Deep case studies of each navigation experience backed by objective testing data
- Identify best practices and novel ways of delivering seamless user experiences across different use cases
- Evaluate the technical and functional differences in the implementation of the selected features across the vehicles
- Recommendations to enhance the customer experience for your own systems and technologies

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Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 Q3 **Q4**

Languages available

English **Japanese** Chinese

Innovation & Strategy Reports

201-
Innovation Guide

Report Focus
New technologies and disruptions impacting advanced planning for automotive supply chain

Introduction
The first steps to being innovative are understanding the marketplace that you operate within and having a clear visibility of oncoming trends within that marketplace. With budgets for automotive R&D remaining tight, OEMs and suppliers continue to grapple with the convergence of industries, development models, and the hype cycle.

SBD's Innovation Guide can serve as your go-to tool to prioritize and monitor the trends that have the most significance across the automotive industry. Published bi-annually, this guide helps teams prioritize innovation efforts by clarifying the opportunities, maturity and eco-system associated with each new technology and emerging trend.

Benefits
- Information on the impact of CE trends on automotive innovation
- Trend and partner identification with 7 Domains, 22 trends, 67 sub-trends and more than 110 potential partners.
- Helps clients understand the broad cross-section of new and upcoming technologies, while cutting through the hype and clarifying potential automotive use cases.
- Clear action on whether to monitor, and/or act, on each of the innovations listed in the report.
- Actionable market landscape of major automotive OEMs, suppliers, and other companies.

Contents



- **>4,600 datapoints**
- **29+ OEMs & 17+ suppliers**
- **New Trends, Dashboards & Summary charts**

XLS Data

Raw Data Sheet
Database of main innovations pursued by OEMs

Summary charts
Major trends and comparisons across OEMs

Company profile Sheet
Select a company to see all innovation initiatives

Trend profile Sheet
Select an innovation to see all companies investing in it

Roadmap
Historical and future outlook of major innovations

PPT Insights

Introduction
Key questions answered in this report and chapter overviews

Executive Summary
Key highlights and conclusions from the report

What's New?
Summary of new innovations added, and major changes to existing innovations

Domain Analysis
- Analysis based on SBD's 7 other domains with the latest updates on news relating to trends and sub-trends, as well as OEM and partner activities.
- Industry convergence, development models, and hype cycles continue to cause OEMs and suppliers to struggle
- Includes trends and partners which includes 4 categories, 22 trends, 68 sub-trends, and 110 partners.
- Understand a broad cross-section of new and upcoming technologies, while cutting through the hype and clarifying their potential automotive use cases.

Potential Partners Detailed Profiles
Potential partners profiles

SBD's Innovation Guide Methodology
Methodology description on how to find new partners

Market Radar Bird's Eye View
Highlights from SBD's Market Radar Insights

Next Step
SBD advises on the so what and action to take as a reader

Useful Links:
Sample / Latest Edition

Markets Covered:
USA Europe China **Global**

Release /Update Timing
Q1 **Q2** Q3 **Q4**

Languages available
English **Japanese** Chinese

Innovation & Strategy

202-

Start-up and Partnerships Tracker

Report Focus

Profiles automotive tech and mobility start ups and their offerings that can bring disruptive solutions to the market

Introduction

Our Start-up and Partnerships Tracker series provides the latest news on innovative new start-ups with automotive potential, cross-industry collaborations, and recently announced investments and acquisitions.

Published every quarter, the tracker will keep you informed and save time by bringing clarity to the most important news and developments from the global automotive-related start-up ecosystem. This report is highly relevant for venture teams, innovation teams, or traditional automotive product planners looking for emerging alternatives to their existing supply base.

Benefits

- Understand the latest updates from leading start-ups providing an array of services to the automotive industry
- Track the most interesting start-ups each quarter
- Understand the significance of these updates through SBD Insights made throughout the report
- Observe detailed analysis of these updates and understand their importance in relation to relevance, timing, and impact

Contents



- **>15,000 datapoints in a relational database**
- **2000 + start-ups covered**
- **News, Partnerships, Investments, Events, Venture Capital Funds and more**

XLS Data

Raw Data Sheet
Data on all analyzed start-ups and incubators, including focus area, status and funding

News
Start-up news by year, quarter, and article links

Company Information
Information on founding year, HQ locations, technology category and industry type

Collaboration Information
Data on collaboration by company, collaboration type, and category

Venture Capital Funds
Data on Venture Capital Fund portfolios, dates of investments in start-ups and exit dates

Event attendance
Which start-ups have exhibited at industry events

PPT Insights

Introduction
Key questions answered in this report and chapter overviews

Executive Summary
Key highlights and conclusions from the report

The Basics
Definition of all the start-up features covered in this report with their maturity stages

What's New
The latest updates from the automotive industry related to start-up, collaboration, and investments from OEM and non-OEMs

Domain Analysis
- Analysis based on SBD's 7 other domains with the latest updates on news relating to trends and sub-trends, as well as OEM and partner activities.
- Each domain section is split into subcategories showing trends in partnerships, investments and acquisitions for each of those categories.
- Information on the types of companies acquiring startups and partnering with startups to give an indication of the future activities of those companies.

Innovation and Strategy Bird's Eye View
Key headlines from reports within the Innovation and Strategy Domain Pass

Next Step
SBD advises on the so what and action to take as a reader

Useful Links:
Sample / Latest Edition

Markets Covered:
USA Europe China **Global**

Release /Update Timing
Q1 **Q2** **Q3** **Q4**

Languages available
English **Japanese** Chinese

Innovation & Strategy

215-

AI for Automotive Guide

Report Focus

Use cases and outcomes for OEMs in their domains or AI applications.

Introduction

With generative AI making significant progress across the consumer tech, advertising and digital industries, it is critical to identify and future-cast its impact on the automotive value chain. Its initial use cases for automotive point toward upstream applications like product dev, image classification, path planning, in-car personalization, and more. With this impact likely to extend to a functional level, identifying which players are driving innovation and how OEMs will need to adapt is key for s/w functions, corporate strategy, marketing to M&A and partnership identification divisions.

This report offers insight into the automotive use cases for generative AI while mapping out how it will impact the industry. Here, the outcome for use case identified (including the trends/sub trend driving them), what the future would be for those use cases and the obstacles the value chain will face in delivering them form the core of the study. The report also provides a list of potential partners, and identifies the different approaches being taken towards the technology by players today.

Benefits

- Highlight case studies on generative AI in upstream automotive applications and functional verticals.
- Showcase the differentiation in approaches by the various players
- Profile and review potential partners to drive AI innovation, grouped by application and domain.
- Clear differentiation in approaches for AI today, and an actionable list of use cases to consider over the next five years.

Contents



XLS Data

Company Profiles
Covering major generative AI players, and their potential involvement in automotive

OEM Landscape
Landscape of current OEM involvement with generative AI such as partnerships

Investments & Acquisitions
Noteworthy investments & acquisitions in generative AI.

Ranking
A data-based scoring of each generative AI company's potential to disrupt/support automotive

Dashboard
Pre-built dashboard showing OEM competitiveness

Definitions
Detailed feature definitions and common questions

PPT Insights

Introduction
Goal / How to use this Guide / Last Update

Executive Summary
Main points of the report

What's New?
Actionable list of players in AI to consider for partnership and potential use cases

Analysis
Deep dive on key trends and market direction

Deep Dive
Brand-level summaries of features/technologies offered

Innovation and Strategy Bird's Eye View
Key headlines from reports within the Innovation and Strategy Domain Pass

Future Outlook
Future-looking benefits for innovation and strategy

Next Steps
SBD advises on the so what and action to take as a reader

Useful Links:
Sample / Latest Edition

Markets Covered:
USA Europe China Global

Release /Update Timing
Q1 Q2 Q3 Q4

Languages available
English Japanese Chinese

Innovation & Strategy

225-

Automotive Sustainability Guide

Report Focus

Sustainability technologies adopted and sourcing strategies for materials and components beyond the battery

Introduction

Sustainability is now a corporate goal to detailed functional KPIs among all major OEMs. Sustainability initiatives revolve around building a Zero Emission portfolio, the breath of Sustainability has spread beyond vehicles to wider environmental and societal aspects like carbon neutral manufacturing and human welfare conscious material sourcing to name a few. The biggest challenge around sustainability is to identify prioritizations in technologies and applications that will enable to balance compliance with cost effective changes to product and process.

In 2026, rather than focusing on OEMs portfolio against CO2/km and % sales SBD's analysis focuses on OEM corporate and vehicle level sustainability initiatives and practices.

Benefits

- Track the landscape of sustainability centric technologies adopted by OEMs and Value Chain players.
- Understand the latest sustainability strategies/technologies adopted by major OEMs.
- Extend your insight on sustainable sourcing strategies beyond batteries to other materials and components used in vehicles.
- Understand what changes your organization needs to make in relation to EU batteries directive around sustainability angle of battery traceability.
- Get a comprehensive view of regional regulation and incentives overview for GHG emission reduction, recycling.

Contents



- **>12,000 datapoints**
- **>30 OEM Groups covered**
- **Country sustainability guidelines**

XLS Data

Product Offerings
Benchmarking OEM Group level sustainability initiatives across product categories

Corporate Strategies
A view of OEM sustainability initiatives and trajectories

Query Builder
Tool allowing users to build own queries and side by side comparisons

Ranking
Data-based ranking of OEMs

Dashboard
Pre-built dashboard showing OEM competitiveness

Definitions
Detailed feature definitions and common questions

PPT Insights

Introduction
Goal / How to use this Guide / Last Update

Executive Summary
Main points of the report

What's New?
Corporate sustainability best practices and profiles on the latest sustainability strategies and technologies adopted

Analysis
Quantitative and qualitative deep dive on key trends and market direction

Sustainability Bird's Eye View
Highlights from SBD's sustainability ecosystem overview

Future Outlook
Forward looking insight on major impacts

Next Steps
Outline of additional data sources & potential projects

Useful Links:
Sample / Latest Edition

Markets Covered:
USA Europe China **Global**

Release /Update Timing
Q1 Q2 **Q3** Q4

Languages available
English **Japanese** Chinese

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Automotive Roadmaps Tracker

Report Focus

Automotive technology market signals tracked across news articles, automotive announcements, patent filings etc.

Introduction

Does covering the global automotive market keep you up at night? Do you wonder if you're seeing the complete picture? SBD's Automotive Roadmaps Tracker provides a powerful tool to enable confident, clear and fast responses to competitive questions in an increasingly complex and fast-changing market. Curated from tens of thousands of trusted and validated sources, it provides distilled intelligence data validated by human expert analysis in a normalized & actionable way. Automotive Roadmaps Tracker helps you save time, optimize products, uncover gaps and align teams to create market confidence.

Benefits

- 13 OEM groups and a minimum of 50+ trends tracked each quarter
- Full Trend Market coverage for the USA, Europe and China; signal coverage for Japan and South Korea
- Standard definitions, comprehensive coverage, 100% traceable and regularly updated
- Team training sessions and definition support

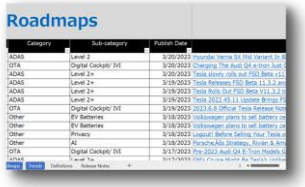
Example Trends

- C.E. payments
- Level 3-5 ADAS
- 5G & 6G
- Video streaming
- Gaming
- Gesture recognition
- Wearables
- DTC sales
- Holographic displays
- Features as a service
- Bendable displays
- Subscriptions
- Metaverse/NFTs

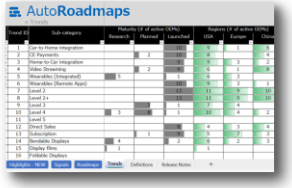
Contents



Highlights



Roadmaps



Trends



Definitions

Eliminates the 'many to many' problem - dozens of separate teams x thousands of competitive announcements...

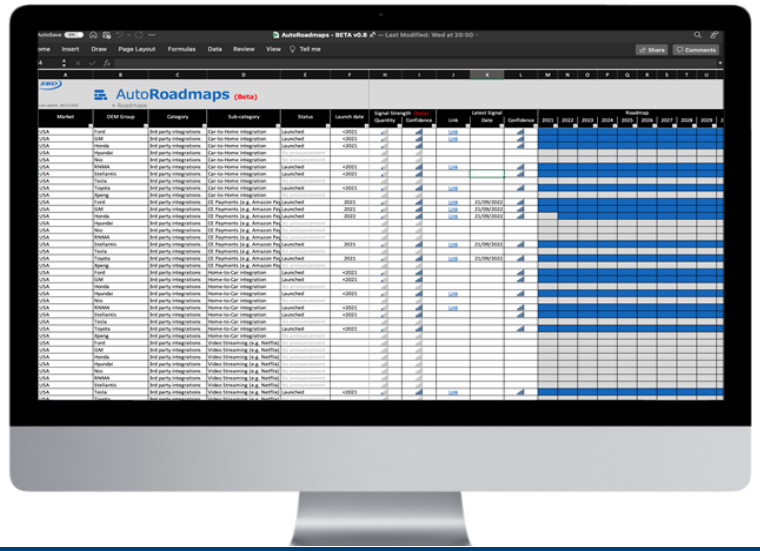
7,000 per month

# of auto-related signals (articles, patents, press releases, etc.)

150 per month

# of high impact signals that companies need to track

…and focus on *what matters to you*



Useful Links:

Request a free trial data set | Sample

Markets Covered:

USA | Europe | China | Japan/ S. Korea

Release /Update Timing

Weekly Update

Languages available

English | Japanese | Chinese

301-

Premium Event Report

Report Focus

Experts on-site at events reporting on innovations, products and partnerships and key insights

Introduction

There are no substitutes to the innovations, presentations, and new technologies introduced live during the world's largest consumer and automotive events and trade shows.

For 2026, SBD Automotive's Premium Event Report series will send experts on-site to cover CES 2026 (USA), Auto China Show (China), and Paris Auto Show (Europe). These three events have major implications for the automotive industry and provide an opportunity for companies from around the world to showcase their latest innovations, products and partnerships.

SBD Automotive's event report series is your way to stay up-to-date with the reveals, demonstrations, sessions, trends and implications of the industry's most important events.

Benefits

- Includes a "Pre-Show" summary report detailing what to expect from each of the events covered by the series
- Rapid and comprehensive reactions to all tech-related announcements at these major events
- Key talking points and themes from each event extracted and clarified to help teams with internal briefings
- Designed for industry professionals, these in-depth publications cover every auto tech announcement

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3 x events

CES 2026	Q1
Auto China 2026 – Beijing Auto Show	Q2
Paris Motor Show 2026	Q4

PPT

Insights

Introduction

A brief introduction to the event and the report

Exec Summary

The buzz topics and key trends from this year's most important shows and what they all mean

Conference & Sessions

Summary of presentations and panels during the show with insights into the trends discussed there

Key Announcements

Brand-by-brand breakdown of the key announcements that were made by exhibitors

Next Steps

Can SBD help you with any unanswered questions?

Useful Links:

Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

3 Pre-Show Summaries + 3 Premium Event Reports

Languages available

English **Japanese** Chinese

Innovation & Strategy

351-

Disruptions to Vehicle Ownership Deep Dive

Report Focus

Transportation, MaaS and new mobility models and experiences transforming vehicle purchase, usage and ownership decisions

Introduction

While, today, OEMs are focused on scaling EV sales to new frontiers and customer demographics, they will need to strategize a longer-term risk and threat assessment to their conventional business models.

Most OEMs already have a set of ownership improvement strategies in their horizons, such as prioritization of digital channels, personalization, and direct-to-consumer delivery. However, beyond that horizon, there are broader trends friction points from different modes of travel, that will see different customer segments treat vehicle ownership differently.

This study aims to provide OEMs with a framework of how to start evaluating the impact of these trends alongside their sub-trends, like city bans on ICEs, Gen Z buying trends, and the experiential priorities of customers.

Benefits

- Deep dive into the threats and opportunities to vehicle ownership that are outside OEM horizons
- Analysis on sub-trends like city bans on ICE, Gen Z buying patterns and the accessibility of new mobility solutions
- Case study assessment of efforts being taken by OEMs today in new mobility that have the potential to tackle these pressures
- Detailed persona analysis that profiles various buying groups and highlights disruptions

Contents



PPT **Insights**

Introduction

Key questions answered in this report and chapter overviews

Executive Summary

Introducing the latest updates on news relating to trends & sub-trends, and OEM & MaaS activities

The Basics

A brief description of legal terminologies covered across this report

What's New?

Summary of new innovations and market launches of OEM new mobility and MaaS solutions

Scenarios

Future scenarios built on upcoming technologies and potential evolutions of existing services

Business Models

Overview of key business models contributing to the mobility industry

Innovation and Strategy Bird's Eye View

Key headlines from reports within the Innovation and Strategy Domain Pass

Next Step

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 **Q2** Q3 Q4

Languages available

English **Japanese** Chinese

353-

China: Technology & Feature Innovation Tracker

Report Focus

Tracks the latest model launches, systems and solutions coming from the region

Introduction

In several regions across the western world, a growing number of luxury and mass-market OEMs are delivering new vehicles and technologies year-on-year. However, alongside these launches, the Chinese automotive market continues to innovate and excel, seeing more facelifts and model launches than any other market around the world. With China's market releasing more models and announcing new vehicle line-ups at increasingly rapid pace, the rate at which domestic and international OEMs are breaking new ground and evolving is increasing at a similar pace. SBD Automotive's new China: technology and Innovation Tracker keeps readers informed of the latest trends and innovations.

Benefits

- Increased understanding and familiarity on key advancements outside of your local environments
- Stay up to date on key advancements

Contents



PPT **Insights**

Introduction
Key questions answered in this tracker

Executive Summary
Key highlights and conclusions from the quarter

The Basics
Explanation of China trends in each of the domains

Analysis
Combining China Innovation Trends with insights from SBD's other Innovation and Strategy Reports

Cockpit & Infotainment Trends
Technology and feature innovations for the domain

Digital Connected Services Trends
Technology and feature innovations for the domain

Security Trends
Technology and feature innovations for the domain

Software-Defined vehicle Trends
Technology and feature innovations for the domain

ADAS & Autonomy Trends
Technology and feature innovations for the domain

Electrification Trends
Technology and feature innovations for the domain

Innovation and Strategy Bird's Eye View
Key headlines from reports within the Innovation and Strategy Domain Pass

Next Step
SBD advises on the so what and action to take as a reader

Markets Covered:
USA Europe **China** Global

Release /Update Timing
Q1 **Q2** **Q3** **Q4**

Languages available
English **Japanese** Chinese

Innovation & Strategy

403 –

Automotive Organization Strategies Deep Dive

Introduction

The transition towards software-defined vehicles is just one of the trends and increasing priorities that is creating new opportunities for OEMs to break established automotive paradigms (such as 'Make vs Buy' or 'Functional vs Vehicle-line decision leadership') to deliver benefits such as rapid pace of deployment and better customer experiences.

This transformation requires a strategic realignment for car makers, which will increasingly need to consider the overall ecosystem and how to adapt their own organizations to fit the new paradigm of 'a smartphone on wheels'.

Rather than focusing on head-count or reporting hierarchies, SBD's analysis focuses on the required culture shifts and a holistic focus on outcomes.

Benefits

- Gain a clear understanding of the different strategies being incorporated and rolled out
- Understand all the organizational factors that are likely to influence the development of the automotive industry in the next decade
- Confidently build your forward strategy with grounded roadmaps and a holistic view of the ecosystem

Contents



PPT

Insights

Introduction
Goal / How to use this report

Executive Summary
Main points of the report

The Basics
Considering the benefits of a Software Defined Vehicle and aspects that must be considered in assessing organizations and strategies

Case Studies
Examples of companies seeking to undergo organizational change to break established automotive paradigms.

Analysis
Key automotive paradigms, and how they can be 'unlocked' by OEMs/partners:
- Delivering experiences
- Information & Innovation to all
- FaaS+
- Lifetime Delivery
- Empowering Informed leadership
- Transformed service & sales model
- Deterministic agile & smart choices
- Modular creation & ownership
- Continuous twin
- Risk appetite

Analysis of key enablers for delivering experiences, pace and other benefits

Recommendations
Strategies for transitioning organizations and strategies including necessary enablers which should be in place.

Innovation and Strategy Bird's Eye View
Key headlines from reports within the Innovation and Strategy Domain Pass

Next Step
SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 **Q3** Q4

Languages available

English **Japanese** Chinese

Innovation & Strategy

750 –

Business Strategies of Disruptor OEMs Deep Dive

Introduction

The aim of this report is to give an insight into how a business is performing, its structure and any recent decisions, partnerships or announcements related to a strategy for keeping the business competitive. Understanding how a business is performing can give an insight into how the market views the business and what 'the market' thinks of the organization.

The aim of this report is to also act as a signal for new emerging technologies. Understanding a business strategy can also give an insight into which technologies are being prioritized and whether this aligns with media releases, concepts and product announcements.

This report aims to show topics and decisions made may competitors that may usually be analyzed by investors or to those making decision about the appropriate strategy for a business, but not necessarily for an individual product or feature.

Benefits

- Gain a clear understanding of the different strategies being incorporated and rolled out.
- Understand all the organizational factors that are likely to influence the development of the automotive industry in the next decade.
- Confidently build your forward strategy with grounded roadmaps and a holistic view of the ecosystem.

Contents



PPT

Insights

Introduction

Goal / How to use this report

Executive Summary

Main points of the report

The Basics

Definitions and descriptions of different areas of business strategy, different types of company and corporate structure.

Analysis

- Company-by-company chapters showing details of recent partnerships, company structure, subsidiaries and market valuations for each company.
- Themes and news from each companies' annual reports and meetings and information about their investor relation activities.
- Any examples of a where a company has been through organizational change to break established routines or start development of new products.

Innovation and Strategy Bird's Eye View

Key headlines from reports within the Innovation and Strategy Domain Pass

Next Step

SBD advises on the so what and action to take as a reader

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 **Q3** Q4

Languages available

English **Japanese** Chinese

251-

2040 Vehicle Technology Guide

Report Focus

Highlights technologies required to power future 3.0 and 4.0 generation of vehicles across Connectivity, Autonomy, Electrification and Security

Introduction

The next generation of vehicle platforms are expected to have a higher level of convergence between the currently disperse technology roadmaps spread across CASES today. By deploying a centralized SDV strategy, OEMs will have the potential to roll out technologies that deliver multi-domain impacts.

This report focuses on providing a 2040 snapshot of what technology convergences are expected to occur between safety, EV, seamless connectivity, security, and cyber that will power the Vehicle 3.0 and 4.0 generations defined across SBD's main guides. Our Guides more broadly focus on defining the individual roadmap for each of the domains listed above and forecasting a 10-year view of how OEMs will progress through the milestones set within these roadmaps.

Benefits

- Focus on the intersections of technologies across safety, EV, seamless connectivity, security and cyber that will have the widest impact on the industry
- Provides a readiness index by OEM for the adoption of these technologies that highlights what customer-facing outcomes they will each achieve
- Helps develop a gap assessment in advanced planning and R&D roadmaps for next-generation vehicle platforms

Note: Bridging study between our Guides, Forecasts and Innovation Guide

Contents



PPT **Insights**

Introduction

Defining the background and objectives of this guide

Exec Summary

Key conclusions and high-level forecasts/changes

Analysis

Quantitative and qualitative deep dive on key trends and market direction

Summary Tables

Summary of OEM portfolios by readiness

Innovation and Strategy Bird's Eye View

Key headlines from reports within the Innovation and Strategy Domain Pass

Future Outlook

Forward-looking insight on major impacts

Next Step

SBD advises on the so what and action to take as a reader

Useful Links:

Sample / Latest Edition

Markets Covered:

USA Europe China **Global**

Release /Update Timing

June 2025

Languages available

English **Japanese** Chinese

Highlights

2210-

Quarterly Highlights

Report Focus

A clear, concise roundup of the most interesting, most impactful, automotive technology developments from each passing quarter

Introduction

Keeping up with the pace of industry change across the automotive and mobility landscape is becoming nearly impossible. Today's time-pressed industry leaders often need an 'outside-in' perspective that captures what they need to know each quarter and helps them re-tune strategic tactics.

SBD Automotive's industry-leading Quarterly Wrap-ups are designed to provide a structured and focused analysis of automotive technology developments strictly over the most recent quarter, and a preview of what to expect in the coming months. Designed to be consumed in 1 hour or less!

Benefits

- Market Radar content is provided on a complimentary basis to SBD Automotive subscribers
- Available in PPT/PDF to share with teams and partners
- Catch up on everything you may have missed in the last 3 months
- Map out next steps into what announcements mean and how they affect the eco-system
- Discuss with your SBD regional sales professional about in-person premium briefings and analysis of the market (additional cost/customer commitment)

Contents



PPT

Insights

Exec Summary

Concise slides covering the quarter's top announcements, trends, and news at-a-glance.

Top Trends

The very top trends from all SDB reports published each quarter mapped against SBD's Trend Radar. Covers timing and impact of new automotive technologies, business models, and emerging strategies across eco-system, government, consumers, and technology.

Major Movers

Each publication highlights SBD's industry choice for Top Disruptor, Top Performer, Top Newcomer, Top Innovator, and Top Communicator while analyzing their impacts on the industry as a whole.

Everything Else

Simple round-up and links of all key automotive & mobility announcements which occurred in previous the quarter with links to stories to learn more.

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 **Q2** **Q3** **Q4**

Languages available

English **Japanese** **Chinese**

3000-

Event Flash Report

Report Focus

Cutting through the noise to extract major, top-level, takeaways from key automotive, and/or auto-adjacent, events and trade shows.

Introduction

Major industry events and specialized conferences provide an opportunity for companies to showcase their latest products and partnerships, but too often present a challenge for attendees or remote followers to digest and summarize the overall industry trends.

SBD Automotive's Industry Event Highlights are an excellent way to keep up-to-date with the major takeaways and top-line news from each show. Each new entry covers a different event, taking a deep dive into their latest reveals and trends alongside their key talking points and topics. The series also works to understand the implications of these reveals for the industry at large. This report series will span several events taking place over the year, with new entries released within two weeks of the event itself.

Benefits

- Market Radar content is provided on a complimentary basis to SBD Automotive subscribers
- Available in PPT/PDF to share with teams and partners
- Rapid reaction to automotive technology announcements at key events
- Key talking points and themes extracted to support internal briefings
- SBD Automotive will publish a light summary of up to 3 targeted events in 2025, but SBD subscribers should consider purchase of the 301 Premium Event Report Series for further events and deeper coverage/analysis.

Event list (tentative/subject to change):

- Executive summary of CES 2026, Auto China, Paris Motor show 2026 and potentially other targeted events of importance to industry

Contents



PPT **Insights**

Introduction

Summary of the event and its importance to the automotive industry

Top trends

Top-level insights into the buzz topics and major trends observed at the event

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Varies by event schedule

Languages available

English **Japanese** Chinese

Playbooks

Playbook

450-

SDV Enablement Playbook

Report Focus

Outlines an OEM's position within SDV and identifies the gaps separating them from competitors in areas like E/E architecture, cyber, software application and cloud layers.

Introduction

Playbooks help analyze how an OEM is performing on enabling technologies like Connectivity and SDV and the experiences derived from them in cockpits and EVs. Our SDV studies have highlighted that there are diverse OEMs strategies and - while many SDV implementations have not translated into features – the combination of features, services and technologies OEMs are able to roll out has a direct impact on their SDV strategy.

- Our updated 2026 SDV Enablement Playbook will act as a single point of reference for a fast discovery of what you need to know from all of our reports, tailored to your company.
- Use your ranking to identify your position hindering the experiences you are enabling, comparing to others to learn lesson to identify key enablers to achieve.
- A domain best-in-class SDV OEM through grounded data and evidence.
- Benchmark strategic position in the normalized ranking and contextualize the 'what and why' of how that OEM earned its position in our rankings.
- A final 'Next Steps' section assesses their impact to you, while mapping out Recommendations, opportunities, and further reading.

Benefits

- Provides an essential tool that delineates your SDV position in the market.
- Identifies your specific areas of advantage, or the gaps separating you from competitors in global markets.
- Highlights the architecture and software strategies utilized to achieve this.

Contents



What is different about a Playbook

These Playbooks are tailor-made for your needs - allowing you to both evaluate your brand's strategy and understand the trends in our reports that are most relevant to you.

Let us know topics in our reports that are of most interest and we will aim to tailor our Playbook to best support.

What We Deliver

Our first edition to you will provide the tailored content with specific analysis to you on this domain topic.

The second edition, and those in future years will refresh and keep the tailored Playbook up to date with latest data and updated analysis.

This model means the Playbook can remain an always fresh document to turn to for a prompt update on what you need to know.

PPT

Insights

Introduction

- Context and positioning within the normalized ranking

Analysis

- Performance across the SDV Domain Pass reports
- Relation to enabled experiences within other Domain Pass reports
- Recommendations drawing on broader SBD insights, for example drawing upon OTA strategy, SDV organization and strategic insights

Next Steps

- Recommendations, opportunities, and further reading

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 **Q3** Q4

Languages available

English Japanese Chinese

Playbook

550-

Connected Technologies Enablement Playbook

Report Focus

Outlines an OEM's position within connected technologies and identifies the gaps separating them from competitors in OTA, FaaS & digital keys.

Introduction

With connectivity now considered to be a core part of every OEM's strategy, the focus has shifted to how connected technologies can enable differentiation in each OEM's market position.

- Our updated 2026 Connected Technologies Enablement Playbook will act as a single point of reference for a fast discovery of what you need to know from all of our reports, tailored to your company.
- Develops a completely new, normalized, ranking across all our Digital Connected Services reports, identifying a domain best-in-class OEM through grounded data and evidence.
- Each customer can benchmark their strategic position in the normalized ranking and contextualize the 'what and why' of how that OEM earned its position in our rankings.
- A final 'so-what' section assesses their impact to you, while mapping out potential next steps in their progression.

Benefits

- Provides an essential tool that delineates your connected technology position in the market.
- Identifies your specific areas of advantage, or the gaps separating you from competitors in global markets.
- Highlights the connected technology strategy utilized to achieve this.

Contents



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PPT

Insights

Introduction

- Context and positioning within the normalized ranking

Analysis

- Performance across the Connected Technology Domain Pass reports
- Relation to enabled experiences within other Domain Pass reports
- Recommendations drawing on broader SBD insights, for example deep dive competitor case studies such as OTA update strategies

Next Steps

- Recommendations, opportunities, and further reading

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 **Q2** Q3 **Q4**

Languages available

English Japanese Chinese

Playbook

600-

Digital Connected Experience Playbook

Report Focus

Outlines an OEM's position in Connected Experiences analyzing underlying enablers and identifies gaps separating them from competitors in Cockpit Apps, HUD and In Car VPA

Introduction

Immersive HMI experiences are becoming the biggest brand differentiator for most OEMs. With the in-vehicle cockpit now increasingly being referred to as a third living space, OEMs must assess whether their connected cockpit technologies are delivering the best possible integrated experience for consumers.

- Our updated 2026 Digital Cockpit Experience Playbook will act as a single point of reference for a fast discovery of what you need to know from all of our reports, tailored to your company.
- Develops a completely new, normalized, ranking across all our Cockpit & Infotainment reports, identifying a domain best-in-class OEM using deep data and evidence.
- Each customer can benchmark their strategic position in the normalized ranking and contextualize the 'what and why' of how that OEM earned its position in our rankings.
- A final 'so-what' section assesses their impact to you, while mapping out potential next steps in their progression.

Benefits

- Provides an essential tool that delineates your cockpit experience position in the market.
- Identifies specific areas of advantage, or the gaps separating you from competitors in global markets.
- Highlights the connected experience strategy utilized to achieve this.

Contents



What is different about a Playbook

These Playbooks are tailor-made for your needs - allowing you to both evaluate your brand's strategy and understand the trends in our reports that are most relevant to you.

Let us know topics in our reports that are of most interest and we will aim to tailor our Playbook to best support.

What We Deliver

Our first edition to you will provide the tailored content with specific analysis to you on this domain topic.

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This model means the Playbook can remain an always fresh document to turn to for a prompt update on what you need to know.

PPT

Insights

Introduction

- Context and positioning within the normalized ranking

Analysis

- Performance across the Connected Cockpit and Experience Domain Pass reports
- Relation to connected experience enabling technologies within other Domain Pass reports
- Recommendations drawing on broader SBD insights, for example deep dive competitor case studies such as OTA update strategies

Next Steps

- Recommendations, opportunities, and further reading

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 **Q3** Q4

Languages available

English Japanese Chinese

Playbook

200-

EV Experience Playbook

Report Focus

Outlines an OEM's position within the EV market and identifies the gaps separating them from competitors in public charging, EV-focused apps, and navigation

Introduction

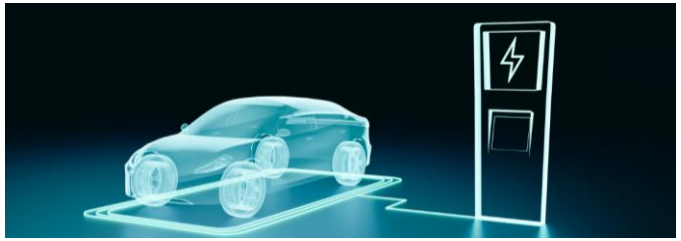
Electric vehicles rely on a multi-channel communications approach incorporating smartphone apps, in-vehicle systems and external charging networks to provide vehicle owners with the best EV features and experiences. Within this approach, EV service differentiations are most notably found in the charging, navigation and EV app experiences.

- Our updated 2026 EV Experience Playbook will act as a single point of reference for a fast discovery of what you need to know from all of our reports, tailored to your company.
- Develops a completely new, normalized, ranking across all our electrification reports - identifying a domain best-in-class OEM grounded with data and evidence.
- Each customer can benchmark their strategic position in the normalized ranking and contextualize the 'what and why' of how that OEM earned its position in our rankings.
- A final 'so-what' section assesses their impact to you, while mapping out potential next steps in the progression.

Benefits

- Provides an essential tool that clearly delineates your position in the EV market.
- Identifies specific areas of advantage, or the gaps separating you from competitors in global markets.
- Highlights the EV strategies that utilized to achieve this

Contents



What is different about a Playbook

These Playbooks are tailor-made for your needs - allowing you to both evaluate your brand's strategy and understand the trends in our reports that are most relevant to you.

Let us know topics in our reports that are of most interest and we will aim to tailor our Playbook to best support.

What We Deliver

Our first edition to you will provide the tailored content with specific analysis to you on this domain topic.

The second edition, and those in future years will refresh and keep the tailored Playbook up to date with latest data and updated analysis.

This model means the Playbook can remain an always fresh document to turn to for a prompt update on what you need to know.

PPT

Insights

Introduction

- Context and positioning within the normalized ranking

Analysis

- Performance across the EV Domain Pass reports
- Relation to EV experience enabling technologies within other Domain Pass reports
- Recommendations drawing on broader SBD insights, for example deep dive competitor case studies such as circuit diagram reviews

Next Steps

- Recommendations, opportunities, and further reading

Markets Covered:

USA Europe China **Global**

Release /Update Timing

Q1 Q2 **Q3** Q4

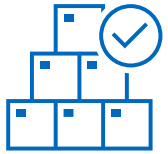
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Appendix

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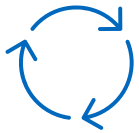
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Contact SBD Automotive

Do you have any questions?

If you have any questions or feedback about this research report or SBD Automotive's consulting services, you can email us at info@sbdautomotive.com or discuss with your local account manager below.

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Book a meeting



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