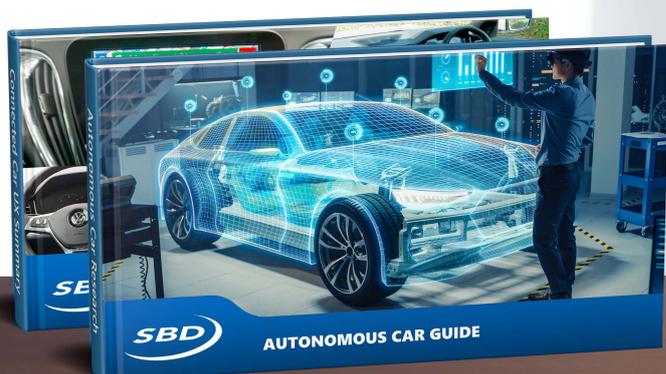
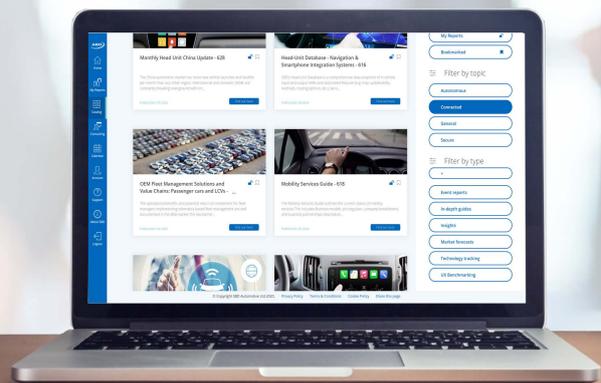


# [ SBD Automotive 2020 ]



# SBD Automotive

## 2020

SBD Automotive is a global automotive consultancy helping OEMs and suppliers locally for over 20 years. Whether you are looking for **foundational intelligence**, **bespoke project** support, or **advanced data**, SBD's expert teams can make sure you receive the support you need to achieve your goals.

To find out more about SBD's research and consulting services, you can visit [portal.sbdautomotive.com](http://portal.sbdautomotive.com) or contact your account manager at [info@sbdautomotive.com](mailto:info@sbdautomotive.com)

## When you need...

...bespoke projects



### Consulting Services

Custom projects to help you plan, test or deploy new solutions into the market

Page 3

...foundational intelligence



### Research Reports

Off-the-shelf research you can quickly access to help explore market/tech trends

Page 10

...advanced data



### Online Tools

Purpose-built online tools that leverage advanced data solutions

Page 20



### SBD Automotive

Independent research and consulting

SBD Automotive is a global consultancy firm specialising in automotive technologies. For over 20 years, our independent research, insight, and consultancy has helped vehicle manufacturers and their partners to create smarter, more secure, better connected, and increasingly autonomous cars.

# SBD Consulting Services

## 2020

This overview of SBD Automotive's **Consulting Services** highlights just some of the ways we can support you in 2020 and beyond.

Due to the bespoke nature of these services, it is best to book a meeting with our account managers and specialists to find out how SBD can specifically help you.

To find out more about SBD's research and consulting services, you can visit [portal.sbdautomotive.com](http://portal.sbdautomotive.com), view the **research portfolio**, or **request a meeting**.

▪ Business strategy	4
▪ Product planning	5
▪ Product development	6
▪ Product evaluation, benchmarking & testing	7
▪ Customer insight	8
▪ Service operations	9



### Example

#### Consent Management

- Provided major automotive OEM with an industry benchmark of all Consent Management practices for data collection
- Identified role of value chain including IVI, call center, dealer, owner portal
- Recommended innovative approach for next-gen. connected car services



## Business strategy

Connected

Autonomous

Cyber

EV

Mobility

Anti-theft



Covering both external and internal scenarios, SBD's business strategy support helps you form high-level plans, allowing you to see where CASE technologies will improve or impact upon on your business. Here, we can help you form genuine, measurable KPIs, highlighting which early strategic variables will affect the long-term output in your project. Building these solid foundations early will support you from product planning to product release, and far into the lifecycles of your products.

Through our business strategy services, we apply our industry experience and process methodologies to help you identify relevant threats and market conditions to adjust your business model to upcoming opportunities.

## Services

- Long term vision & roadmap
- Market/feature trends
- Technology trends
- Business opportunities
- Disruptive threats
- Organization structure
- Mergers & acquisitions  
- due diligence



## Find out more

Request a meeting to find out more about SBD's bespoke business strategy support

Request meeting



## Product planning

Connected

Autonomous

Cyber

EV

Mobility

Anti-theft



SBD's product planning services help you make the right decisions early - to ensure you are choosing the best features and functions to support your business objectives. Here, our product planning teams can help you identify the right customers and understand what they are willing to pay for your potential CASE products, features and services.

Building on a solid business strategy, our product planning teams are ready to help you identify the relevant competitor trends while avoiding industry noise, helping you to focus on the correct emerging technologies and pricing models for your product in a constantly shifting marketplace.

### | Services

- Customer needs
- Competitor analysis
- Service/feature selection
- Supplier selection (RFQ)
- Technology selection
- Business & pricing model
- Market size forecasting

## Find out more

Request a meeting to find out more about SBD's bespoke product planning support

Request meeting



## Product development

Connected

Autonomous

Cyber

EV

Mobility

Anti-theft



What technology do we need? Which suppliers do we use?  
What level of performance should we be targeting?

Through defining the business and technical requirements to create new products, and aligning them with regional legislation, SBD's product development teams will support you in bringing your product to market. Here, we can help you move from visions to the tangible, granular details, where you can specifically target performance levels, with the correct suppliers and specifications.

Our prototype testing team can then be brought in to ensure that the output is still matching the original goals, while remaining agile enough to move with market changes.

## Services

- Requirements definition
- System specification
- Project management
- Prototype evaluation
- Legislation check (eg GDPR)
- UAT testing
- HMI/GUI creation



## Find out more

Request a meeting to find out more about SBD's bespoke product development support

[Request meeting](#)



## Product evaluation, benchmarking & testing

Connected

Autonomous

Cyber

EV

Mobility

Anti-theft



SBD's evaluation, benchmarking & testing services join up the dots between the engineers that work on planning and implementing systems, and end users who live with the system day-in, day-out.

By testing concepts, prototypes, and competitor solutions, our product evaluation team is able to help you validate performance and avoid costly mistakes. Typically, our product testing teams will initially be brought in to help the vehicle and system integration testing. Later in the project, our product testing teams will assist in expert testing of the system, for example, the UX team's evaluations to help improve a design before its launch, or our cyber team identifying potential vulnerabilities.

### Services

- UI/UX
- Navigation, content (eg traffic)
- VR, VPA
- App, portal
- Connected services
- Onboarding/registration
- Mobility services
- ADAS HMI
- ADAS performance
- Cyber pen test
- Anti-theft



## Find out more

Request a meeting to find out more about SBD's bespoke evaluation, benchmarking & testing support

Request meeting



## Customer insight

Connected

Autonomous

Cyber

EV

Mobility

Anti-theft



SBD's customer insight team will help you understand and validate consumer needs through surveys, focus groups and product clinics, as well as other innovative methods, including biometric analysis and behavioral science.

Using the right tools and techniques at the right time, our customer insight services will help you predict and plan for your customer's future requirements. By working as a bridge between product planners and engineers, our consumer analysts are ready to help you to remain agile as your product moves into development, ensuring you have heard the customer's voice before you reach market.

### | Services

- Journey mapping (lifecycle)
- End user survey
- Focus groups
- Product clinic



## Find out more

Request a meeting to find out more about SBD's bespoke consumer insight support

Request meeting



## Service operations

Connected

Autonomous

Cyber

EV

Mobility

Anti-theft



With digital services revolutionizing the traditional automotive technology lifecycle, business model and ownership experience, traditional operation models no longer work.

With our service operations support, SBD helps you streamline and optimise services, helping you adapt to work with your dealer network to offer extended servicing, pay-monthly services, and ultimately, to build an ecosystem that will entice customers to stay with your brand.

From launch support, all the way through to helping you achieve the KPIs set back at the beginning of the process, our service operations support will keep you agile.

### | Services

- Dealer/NSC launch support
- KPIs (e.g. activation, usage)
- Data analytics
- Commercialisation
- Ownership experience
- SLA compliance



## Find out more

Request a meeting to find out more about SBD's bespoke service operations consulting support

Request meeting



# SBD Research Reports 2020

The SBD Automotive Research Portfolio highlights the reports available for purchase in 2020. Here, you can see the 'New for 2020' reports, and 'Featured Reports', offering an in-depth overview of 3 of our new releases.

To find out more about SBD's research and consulting services, you can visit [portal.sbdautomotive.com](http://portal.sbdautomotive.com) or contact your account manager at [info@sbdautomotive.com](mailto:info@sbdautomotive.com)

## Featured Reports

- Driver and Cabin Monitoring Technologies \_\_\_\_\_ 11
- The Automotive Over-The-Air Update Ecosystem \_\_\_\_\_ 12
- Evolution and Technology Drivers for Next-Generation E/E Architectures \_\_\_\_\_ 13

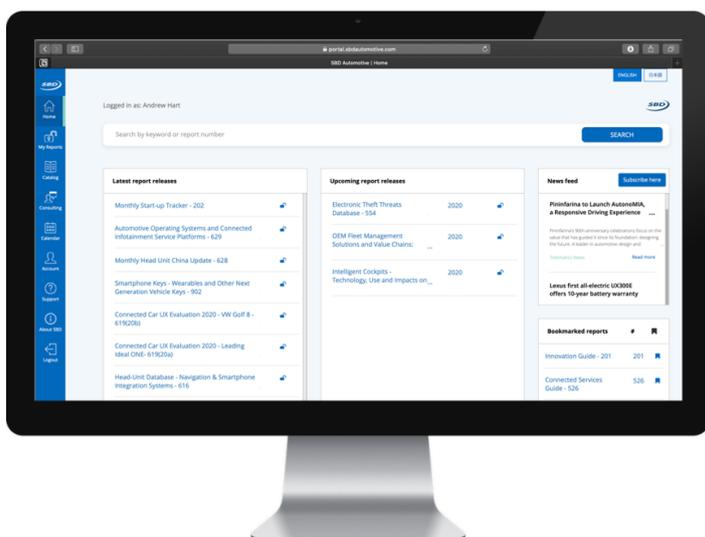
**New for 2020** \_\_\_\_\_ 14-15

**Research Reports** \_\_\_\_\_ 16-19

**100+**  
Reports published  
per year

**50k+**  
Slides of insights,  
forecasts & data

**4,000+**  
# of auto professionals  
who access our reports



## Example

### Connected Services Guide

- Detailed profiles of every OEM connected service offered across 20+ markets
- Features, technologies, suppliers, pricing models, architectures and coverage
- 1,000s of ready-to-reuse PowerPoint slides updated every quarter
- Accompanying Excel spreadsheet for in-depth analysis



Driver and Cabin Monitoring Technologies

Code: 810

Connected

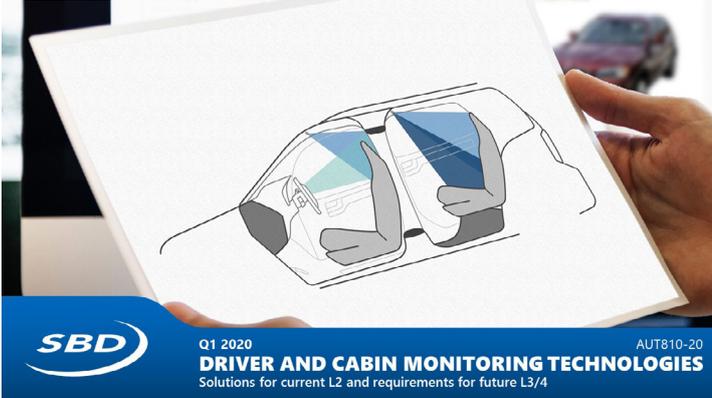
Autonomous

Cyber

EV

Mobility

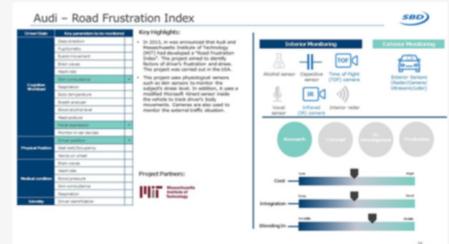
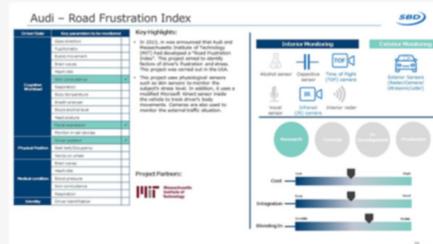
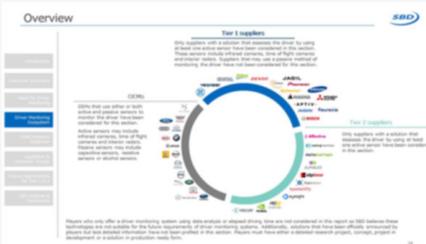
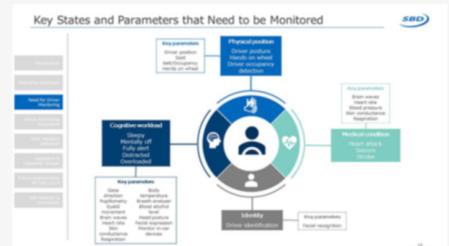
Anti-theft



'Solutions for current L2 and requirements for future L3/4'

SBD believes that driver monitoring is an essential tool that can enable higher levels of autonomy. Additionally, the integration of driver monitoring technology by OEMs can ensure driver safety as well as a safe interaction between the human and the machine.

SBD has created "Driver and Cabin Monitoring: Solutions for current L2 and requirements for future L3/4" - a guide to driver monitoring systems, their involvement in autonomous vehicles and the legislation surrounding them.



This report explains why interior monitoring technologies are soon to become necessary for the deployment of higher levels of automation and indicate active areas of research, and the technology being considered for driver monitoring and child presence detection. Furthermore, this report analyzes the research, concepts and existing driver monitoring solutions (such as driver biometrics) from 42 key players.

Contents:

- 1. Introduction
- 2. Executive Summary
- 3. Need for Driver Monitoring
- 4. Driver Monitoring Ecosystem
- 5. Child Presence Detection
- 6. Legislation & Consumer Groups
- 7. Future Requirements for SAE L3/L4
- 8. SBD Analysis & Conclusions

Do I have access?

## The Automotive Over-The-Air Update Ecosystem

Code: 633

Connected

Autonomous

Cyber

EV

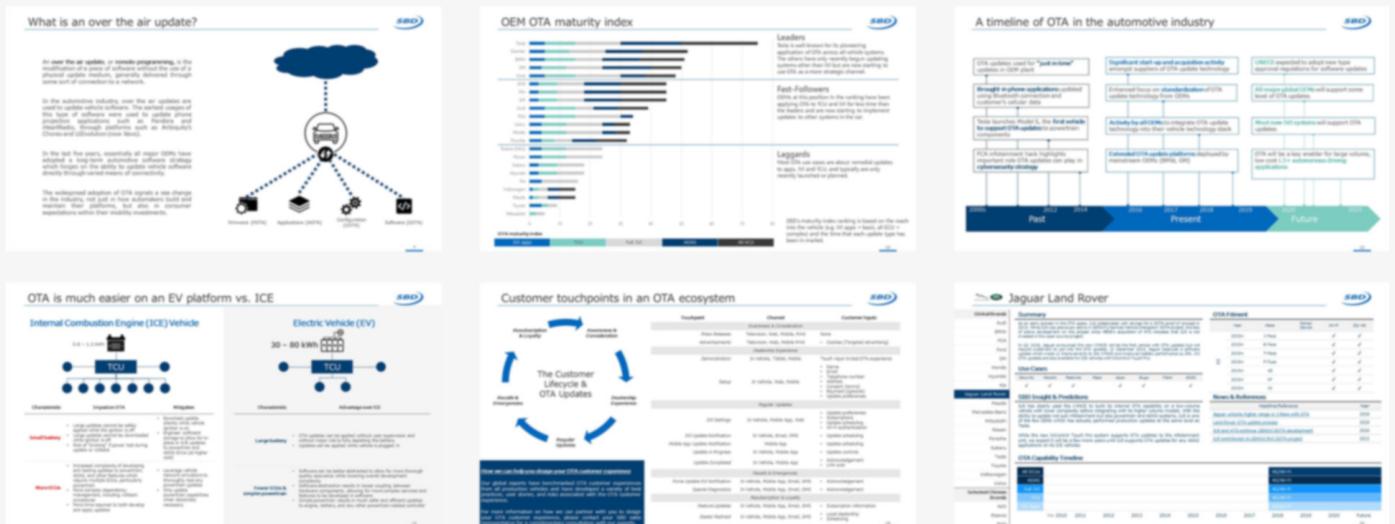
Mobility

Anti-theft



By 2022, all global OEMs will have integrated some level of OTA update technology to their vehicle platform portfolio. This report provides an overall view of how OTA updates are being adopted by the industry. This includes the perspectives of both OEMs and suppliers, their activities and how some OEMs are currently researching OTA updates as they take the steps to utilize them in their own vehicles.

Additionally, the report gives deep insights on regulatory activities, industry organizations, overall risks, forecasts, and trends within the OTA update ecosystem.



This report provides an in-depth view of how OTA updates are being adopted by the industry. This includes both OEM and supplier activities and perspectives as well as deep insights on regulatory activities, industry organizations, overall risks, forecasts, and trends within the OTA update ecosystem.

### Contents:

- 1. Executive Summary
- 2. Introduction
- 3. Customer Experience
- 4. OEM Strategies & Case Studies
- 5. OTA Suppliers
- 6. Governance
- 7. Technical Topics
- 8. Connectivity Strategy
- 9. Regulatory Activity

[Do I have access?](#)

# Evolution and Technology Drivers for Next-Generation E/E Architectures

Code: 630

Connected

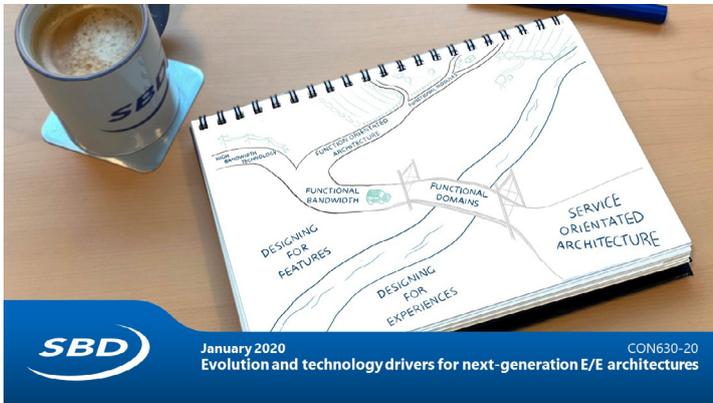
Autonomous

Cyber

EV

Mobility

Anti-theft



A well-planned, holistic approach to electrical and electronic architectures will reduce manufacturing costs & increase vehicle safety, security and system usability. Decisions made now will be a vital part of meeting the autonomous, connected and mobility expectations of a consumer in the near future.

To help explain the features, functions and attributes of emerging E/E architecture solutions, and how they relate to the entire CASE design space, SBD Automotive is creating 'Evolution and Technology Drivers for Next-Generation Electrical and Electronic Architectures' for the 2020 Report Series to inform, clarify and support your strategic E/E decisions.



There are decisions (such as hypervisors, ethernet domain controllers and service orientated architecture) which are great options for flexibility, but only if they deliver your specific, and unique, customer requirements at the right price point. This report helps you to understand the positive and negatives of the entire E/E architecture design space and make informed, strategic decisions.

**Contents:**

- 1. Executive Summary
- 2. Why Architecture Matters
- 3. State of the Art
- 4. Drivers of Change
- 5. Technical Solutions
- 6. Future Outlook

Do I have access?

## Automotive Operating Systems and Connected Infotainment Service Platforms

Code: 629

EV                      Autonomous                      Cyber                      Mobility                      Anti-theft

While the entire automotive industry is undergoing massive shifts in consumer expectations, as well as technological innovation in powertrain, fuel, and electrical architectures, the area that has undergone the most change in the shortest amount of time is the in-vehicle experience. In this report, SBD's Car IT Team comprehensively profile the modern infotainment ecosystems from the ground up: system on chip (SoC) & silicon vendors, automotive tier 1s, operating systems, and the various ecosystems surrounding infotainment supporting digitally-oriented consumer experiences.



**This is a one-off report**

Report scope -

- 1. A specific focus on Android Automotive, UX issues solved (and presented) by the platform
- 2. Automotive OS and Connected Infotainment service platforms ecosystem
- 3. Infotainment Service Platform provider profiles
- 4. Integrated hardware stack (SoC and SiP)

[Do I have access?](#)

## OEM Fleet Management Solutions and Value Chains Passenger Cars and LCVs

Code: 631

Connected                      Autonomous                      Cyber                      EV                      Mobility                      Anti-theft

Here, SBD explores the activities of OEMs in both the passenger car and light commercial vehicle (LCV) value chains for fleet management solutions (FMS). Once different activities are shown, the strategies taken by OEMs are then compared and contrasted. Additionally, this report analyses the value chain of fleet management solutions. This includes analysis of the business model, including sales and support channels, the considerations for OEMs and FMS companies when partnering or integrating, and the role of OEMs in the fleet management value chain.



**This is a one-off report**

Report scope -

- 1. Business model analysis (including sales & support channels)
- 2. Considerations for OEMs and FMS companies when partnering/ integrating
- 3. The role of OEMs in the fleet management value chain

[Do I have access?](#)

## Intelligent Cockpits Technology, Use and Impacts on the Interactive User Experience

Code: 632

Connected                      Autonomous                      Cyber                      EV                      Mobility                      Anti-theft

'Intelligent Cockpits Technology, Use and Impacts on the Interactive User Experience' is an analytical study that shows the current status and future trends of intelligent cockpits (that utilize technology such as AI, AR and cloud computing) in the automotive industry. It follows a series of objectives, such as presenting an overview of the development impacts of intelligent cockpits and showcasing the different use cases, technologies and security considerations for intelligent cockpits.



**This is a one-off report**

Report scope -

- 1. Present an overview of the development impacts of intelligent cockpits
- 2. Showcase the different use cases, technologies and security considerations
- 3. Company profiles of various OEMs and Tier-1 suppliers that are developing intelligent cockpits

[Do I have access?](#)

## Smartphone Key Systems Evaluation

Code: 707

Connected

Autonomous

Cyber

EV

Mobility

Anti-theft

Consumer electronics companies now have a foothold within the automotive industry through integrating their smartphone technology with automotive technologies. One way this integration can be observed is through the adoption of smartphone key systems by OEMs across the globe. This report allows system designers to benchmark different systems and develop functional designs that utilize the best security practices. By analyzing a range of smartphone key systems that utilize BLE and NFC, SBD provides an independent assessment of each, focusing on their functionality, security and technology.



### This is a report series

Contents -

1. Introduction
2. Executive Summary
3. Vehicles and Test Equipment
4. System Evaluation

[Do I have access?](#)

## Biometrics in Automotive Security User Authentication, Vehicle Access and Start

Code: 710

Connected

Autonomous

Cyber

EV

Mobility

Anti-theft

OEMs have been showing interest in using biometrics for vehicle security. However, the benefits of biometrics are unclear and if they are a viable solution for the mass market. This report explores the current market situation with the intent to better understand where the market is going and if there are opportunities from which OEMs may take advantage. The report is split into three main sections. The first shows case studies of existing and potential vehicle access systems, the second describes the working principles of the main biometric technologies and the third outlines current, and future, biometric products.



### This is a one-off report

Contents -

1. Introduction
2. Executive Summary
3. Applications for Vehicle Security – Case Studies
4. Current and Future Applications for Vehicle Security – Entry and Start
5. Current and Future Applications for Monitoring and Personalisation
6. Biometric Technologies

[Do I have access?](#)

## Electronic Theft Threats Database

Code: 554

Connected

Autonomous

Cyber

EV

Mobility

Anti-theft

SBD's latest update of the 'Electronic Theft Threats Database' highlights some of the tools and devices that are currently being used by criminal groups across Europe. It describes the range of tools and devices available that have the most impact on vehicle theft, or that have reportedly been used to steal vehicles. While the list contains many of the main tools used in the theft of vehicles, it is not a definitive list of all the tools available. This is because there are a multitude of duplicates and copy tools that perform the same functions as each other.



### This is an annual report

Contents -

1. Executive Summary
2. New Tools
3. Updated Tools
4. Removed Tools
5. Database
6. Models Affected
7. Website Links

[Do I have access?](#)

Innovation Guide

General



**Guide** / Monthly / Code: 201

[Do I have access?](#)

Start-up Tracker

General



**Tracker** / Monthly / Code: 202

[Do I have access?](#)

Events Series Subscription

General



**Events** / Within 2 weeks / Code: 300

[Do I have access?](#)

Quarterly Highlights

General



**Tracker** / Quarterly / Code: 206

[Do I have access?](#)

Connected Services Guide

Connected



**Guide** / Annual & Quarterly / Code: 526

[Do I have access?](#)

The Connected Car Legislation Guide

Connected



**Guide** / Quarterly / Code: 528

[Do I have access?](#)

Automotive App Guide

Connected



**Guide** / Quarterly / Code: 531

[Do I have access?](#)

Global Connected Car Forecast

Connected



**Forecast** / Annual / Code: 536

[Do I have access?](#)

Head-Unit Database

Connected



**Database** / Quarterly / Code: 616

[Do I have access?](#)

### Automotive Over the Air Updates Ecosystem

Connected



**Analysis** / One-off report / Code: 633

Do I have access?

### Mobility Services Guide

Connected / Mobility



**Guide** / Quarterly / Code: 618

Do I have access?

### Connected Car UX Evaluation

Connected



**Benchmark** / Monthly / Code: 619

Do I have access?

### Remote Vehicle Data & Diagnostics

Connected



**Analysis** / One-off report / Code: 621

Do I have access?

### Opportunities and Approaches for Automotive OEMs in Mobility

Connected / Mobility



**Analysis** / One-off report / Code: 622

Do I have access?

### Automotive Virtual Personal Assistants

Connected



**Analysis** / One-off report / Code: 624

Do I have access?

### Head-Unit & Display - Trends & Analysis

Connected



**Analysis** / Annual / Code: 625

Do I have access?

### Connected Car & Mobility Consumer Survey

Connected / Mobility



**Survey** / One-off report / Code: 626

Do I have access?

### Data Monetization

Connected / Mobility

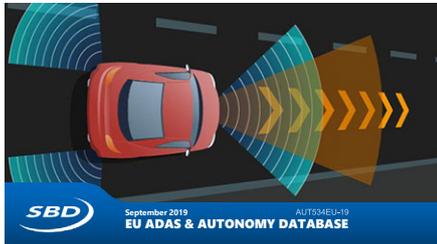


**Analysis** / One-off report / Code: 627

Do I have access?

### ADAS & Autonomy Database

Autonomous



**Database** / Annual / Code: 534

[Do I have access?](#)

### The Autonomous Car Legislation Guide

Autonomous



**Guide** / Quarterly / Code: 535

[Do I have access?](#)

### ADAS & Autonomy Forecast

Autonomous



**Forecast** / Annual / Code: 538

[Do I have access?](#)

### V2X Guide

Autonomous



**Analysis** / One-off report / Code: 802

[Do I have access?](#)

### Autonomous Car Guide - Landscape overview

Autonomous



**Guide** / Quarterly / Code: 804

[Do I have access?](#)

### ADAS HMI Benchmarking

Autonomous

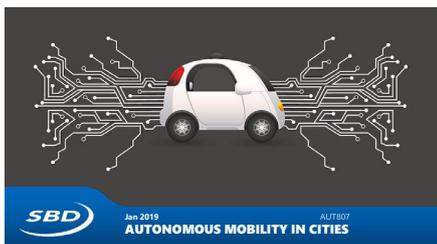


**Evaluation** / Quarterly / Code: 806

[Do I have access?](#)

### Autonomous Mobility in Cities

Autonomous



**Analysis** / One-off report / Code: 807

[Do I have access?](#)

### Autonomous Car Guide - OEM Deployment Scenarios

Autonomous

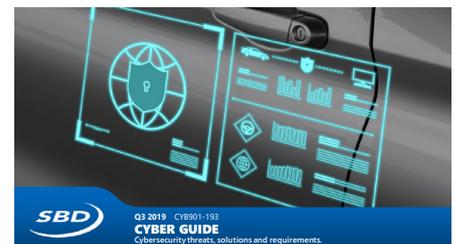


**Analysis** / Annual / Code: 809

[Do I have access?](#)

### Cyber Guide

Cyber



**Guide** / Quarterly / Code: 901

[Do I have access?](#)

## Securing the CAN Bus

Cyber

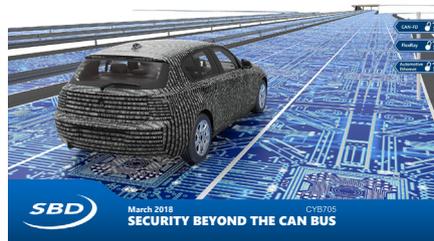


**Analysis** / One-off report / Code: 704

Do I have access?

## Security beyond the CAN Bus

Cyber



**Analysis** / One-off report / Code: 705

Do I have access?

## Electric Vehicle Guide

EV



**Guide** / Quarterly / Code: 623

Do I have access?

## Anti-Theft Guide

Anti-theft



**Guide** / Quarterly / Code: 533

Do I have access?

## Relay Attack Countermeasures Evaluation

Anti-theft



**Testing** / One-off report / Code: 706

Do I have access?

## Future Vehicle Key User Survey - Private & Fleet

Anti-theft



**Survey** / One-off report / Code: 708,709

Do I have access?

### Can't find what you're looking for?

Subscribe at [portal.sbdautomotive.com](http://portal.sbdautomotive.com) to view SBD's online catalogue, request pricing and download samples of the research reports.

You can also request custom reports through SBD's bespoke consulting services.



# SBD Online Tools

## 2020

There's a world of vehicle data out there, from vehicle pricing & packaging data through VIN decoding to vehicle sales. SBD's vision is a one stop shop for vehicle data by augmenting our industry leading VIN data through partnerships with leading providers to create one normalised set of vehicle data that covers vehicle:

- Feature and Package fitment & pricing
- Live vehicle sales and production
- Regional cuts
- Package adoption and complexity

This proprietary data warehouse is ready today and is already being used throughout the automotive ecosystem with use cases including vehicle product planning, Tier 1 competitive intelligence, insurance ADAS quoting and OEM supply chain management through our VehiclePlanner suite of products.

SBD's proprietary data has been adopted and integrated into over 30% of the US automotive market OEM's by volume in the last 12 months alone.

- VehiclePlannerPlus \_\_\_\_\_ 21
- VehiclePlannerPro \_\_\_\_\_ 21

### 143mIn

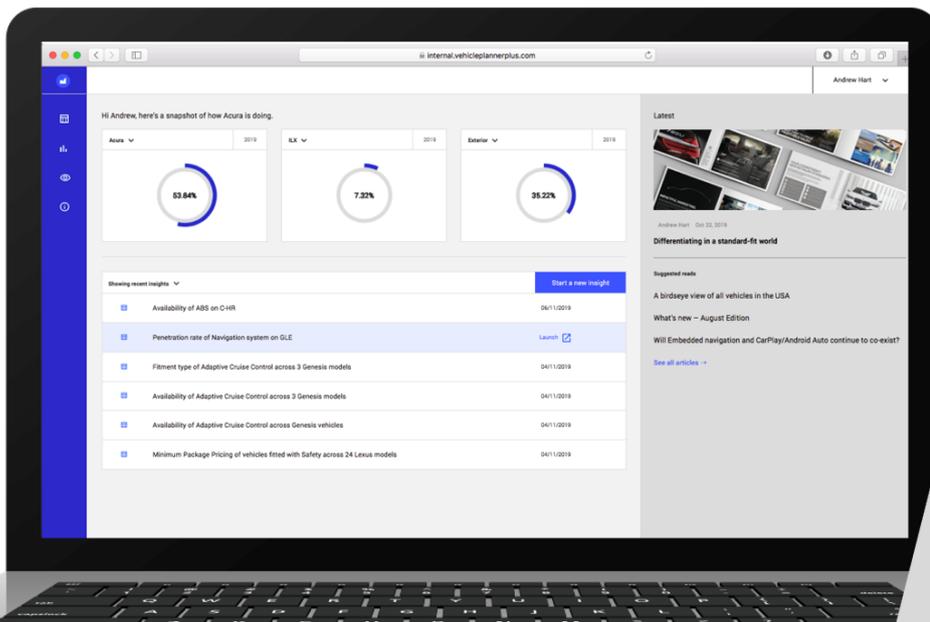
Data points on cars

### 98%

Tracking of cars sold in USA

### 100+

Users of real-time data



Example

### VehiclePlannerPlus

- Online SaaS tool with features, specs and penetration data for almost all vehicle features.
- See trends of feature adoption and competitive intelligence all in one place.
- View and compare the pricing and package logic for all vehicles and all features.

Model Year	Brand	Model	Trim	Navigation system	Price
2020	Acura	AA	2.0T Premium	N/A	\$41,000
2020	Acura	AA	2.0T Premium Plus	\$42,000	\$41,000
2020	Acura	AA	2.0T Package	\$43,000	\$41,000
2020	Acura	AA	2.0T quattro Premium	N/A	N/A
2020	Acura	AA	2.0T quattro Premium	\$45,000	\$43,000
2020	Acura	AA	2.0T quattro Premium	\$45,000	\$43,000
2020	Acura	AA	AWD 2.0T quattro-Pre.	N/A	N/A
2020	Acura	AA	AWD 2.0T quattro-Pre.	N/A	N/A
2020	Acura	AS	AWD 2.0T quattro-Pre.	\$53,300	\$53,700
2020	Acura	AS	AWD 2.0T quattro-Pre.	\$48,300	\$48,700
2020	Acura	AS	AWD 2.0T quattro-Pre.	\$53,000	\$53,000

Online Tools

**VehiclePlannerPlus** → Better Decisions. Faster.

**Richer data**

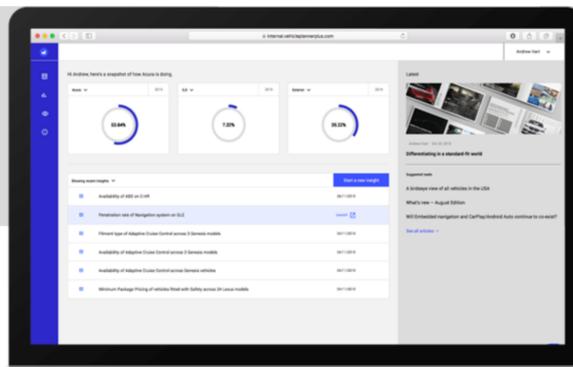
- 2500+ features & sub-features (including connectivity & ADAS)
- Penetration & sales data

**User Friendly**

- Data centric user experience with a quick and easy query builder
- Large number of standard insights allowing you to answer questions without any complex integrations.

**Faster queries**

- Create tables in seconds
- Export to Excel
- Smart notifications



VehiclePlannerPlus gives us access to data all in one place that does not exist elsewhere. The support is unparalleled, the VPP team is always willing to work with us and add new functionality with incredibly fast turnaround time.  
**Program Manager**  
 Major Tier 1 Supplier

We have been very impressed with the breadth and depth of the VehiclePlannerPlus solution. What started out as a concept has come together very quickly. SBD is extremely responsive to feedback and always looking to make the product even stickier.  
**Director, Pricing & Market Analytics**  
 Major OEM

**VehiclePlannerPro** → Bigger decisions. Your way.



**VIN Data**

- Sales with Velocity
- Regions via zip
- Includes package fitment



**Vehicle Data**

- Make/Model/Trim/Style
- Pricing & Packaging
- Normalized Features



**ADAS + Connectivity Data**

- Connected services
- ADAS functionality + technologies



**Some Client Use Cases To Date**

- Reduced offering complexity to improve profitability.
- Analyzed competitor package and vehicle velocity to determine customer interest and provide more relevant offerings.
- Compared competitive trim and package pricing to provide superior value to customers.

Covers all the US market



E.g. 1FBZX2CM7FKA00558

2020 Toyota Camry XLE

Premium Package

= Nav + Moonroof...

\$28,850 + \$2,650

Sold 12.10.19 in 48103 in 20 days

The global automotive consultants  
helping OEMs and suppliers locally  
for over **20 years**



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