SAR Insight & Consulting

For immediate release – August 21, 2020

Audio delivery to connected automobiles is revolutionizing the in-car audio experience

100 million connected vehicles with expansive and personalized audio systems to ship in 2025, says SAR Insight

The significant growth of connected vehicles and internet accessibility supported by network expansion is transforming the in-car dashboards of vehicles today and in the future. The automotive market has become increasingly connected, servicing an increased base of audio system solutions.

The integration of advanced technologies within the automotive audio space is shaping the in-vehicle radio experience. SAR estimates that there will be over 100 million connected car shipments worldwide by 2025. These cars will be equipped with the latest in-car entertainment dashboards supported through wireless connectivity.

Audio delivery within the connected vehicle is evolving with both existing and new technology solutions from traditional AM/FM broadcast radio, digital radio, satellite, smartphone mirroring systems, to digital streaming services and growth of hybrid solutions that combine broadcast radio and IP internet technologies. These audio systems are now creating sizable value-add to the end consumer with more customized content and information than ever before.

A number of critical market drivers are contributing to the breadth of systems and services and rate of growth including connected vehicles, electric and hybrid cars, advanced driver-assistance systems, high efficiency audio codecs, 5G cellular networks, metadata related to real-time programming, embedded vehicle operating systems, and hybrid radio platforms that now offer a wider array of broadcast and online content services. Addressing these market trends and tapping into the leading contributors across the expanding ecosystem will increase market opportunity aligned with evolving strategic and business planning models.

“Radio remains very relevant to consumers within the automotive space. The key is to expand on the benefits of radio with enhanced quality and personalized user experiences as complimentary audio services within the vehicle emerge,” Dennis Goldenson, Director of Artificial Intelligence and Machine Learning at SAR Insight & Consulting, said. “Hybrid radio is a great example of combining the best of broadcast and digital radio with the latest internet technology product offerings. This opens up increased customized content regardless of the driving environment and is supported by major broadcasters, technology providers and OEMs globally”.

According to SAR, leading organizations such as WorldDAB, RadioDNS, Radioplayer, technology companies such as NXP, STMicroelectronics, Silicon Labs, Bose, Fraunhofer, Apple, Google, Xperi, and OEMs such as BMW, Audi, Mercedes-Benz, Volkswagen, GM, Ford are contributing and competing to ensure audio delivery meets the growing expectations of “connected” vehicle drivers.

“The most exciting things about new innovative audio delivery technologies is the ability to now replicate the connected experience from the home and on smartphones to the in-cabin vehicle.” Dennis said. “We anticipate this trend will grow and that the industry will adapt to ensure the car becomes a prominent and open channel for available and reliable audio and content sources”.

“SAR Insight expects that new government regulations, developments in digital delivery, internet radio and embedded operating systems are changing the landscape. For example, Digital Audio Broadcast (DAB) in Europe will be standard in over 15 million in new vehicles this year. In North America, there are currently 4,300 stations broadcasting digital channels and more than half of all new cars sold now are available with HD Radio receivers. Satellite services in the United States are investing in internet and podcast content acquisitions and the first onboard systems functioning on OS open source platforms is now being released by automotive manufacturers.

Key strategic partnerships and acquisitions are developing across the audio and automotive ecosystem and enabling significant growth and opportunity to support this changing landscape and advance audio delivery within the connected vehicle.

These findings are from SAR Insight & Consulting’s recently published study on ‘Audio Delivery in the Age of the Connected Vehicle,’ which is published as part of its Audio Software and IP service.

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Notes to editors: SAR Insight & Consulting provides detailed qualitative and quantitative research on established and emerging technology markets across multiple end applications, covering audio, voice, AI, UI, connectivity, sensors and more. www.sarinsight.com