ADAS: Trust. Excite. Use. Monetize.

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BCG + BOSCH

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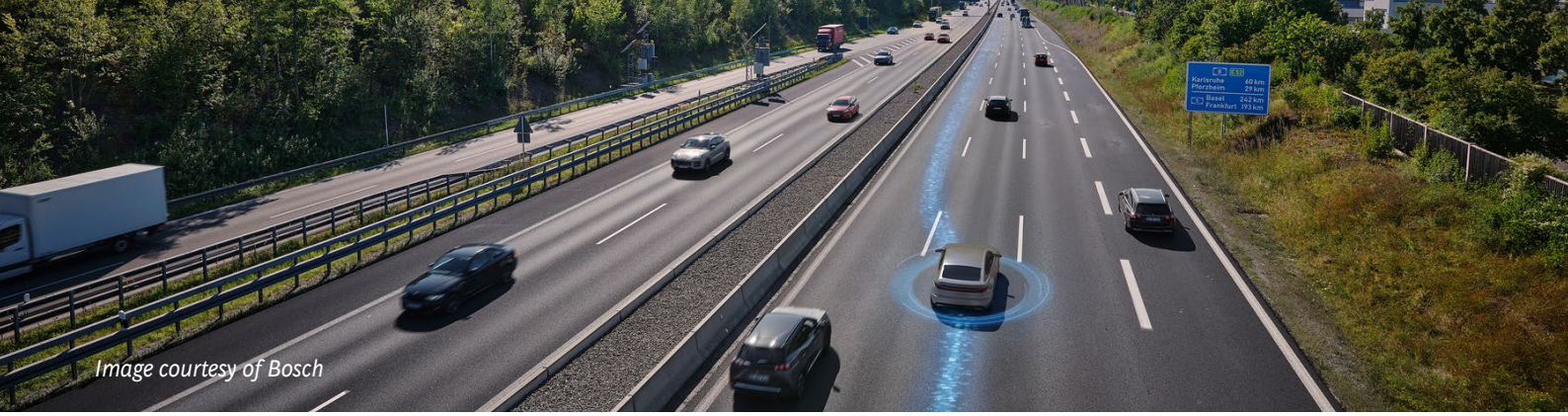


Image courtesy of Bosch

Advanced Driver Assistance Systems (ADAS) represent a major untapped profit pool in the automotive industry today. Over 55% of consumers are willing to pay a premium for a vehicle with the latest ADAS capabilities, according to a recent survey by BCG and Bosch—one of the largest studies examining consumer sentiment about ADAS to date.

ADAS technology enables a range of activities from assisted parking to semi-autonomous driving. For auto OEMs, it represents a significant opportunity to bolster the bottom line, given the current environment of weak profitability in the industry. Manufacturers can generate revenue from ADAS by including its cost in the vehicle purchase price or by charging consumers a monthly subscription fee. However, due to limited consumer adoption driven by gaps in reliability, transparency, and user understanding, most car makers are only capturing a fraction of its potential value.

To shed light on the specific factors that are holding back ADAS usage, we surveyed nearly 3,000 car owners across seven countries who had purchased a vehicle with an ADAS system over the past three years. **(See "Survey Methodology.")** While respondents noted the reliability of ADAS features as a concern, it was not the only one. Equally important for consumers were issues around education, activation, and pricing transparency.

In short, the message is: OEMs have the technology; the challenge now is to get consumers to use it—and pay for it.

Manufacturers should take note of these survey findings if they are to fully grasp the ADAS opportunity. Beyond fixing technical glitches, they must build on latent consumer interest and excitement by targeting investment in trust-related areas—such as better explainability and sales approaches—to create advocates for the technology so that they can sell more systems.

Based on the survey findings, we offer detailed recommendations to help OEMs maximize ADAS usage and monetization. They cover improving consumer education and feature awareness; driving daily ADAS usage; and leveraging pricing, packaging, and communications. We also offer some questions for OEMs to consider as they make these changes. **(See "Food for Thought—and Action.")**

Survey Methodology

We surveyed more than 25,000 respondents in China, France, Germany, Japan, South Korea, the United Kingdom, and the United States to understand consumer perceptions of ADAS. From this group, we identified a qualified sample of 2,823 recent new-car buyers whose vehicles were equipped with ADAS features. We then weighted survey responses, using country-specific demographic targets, to ensure the group was representative for a particular market across a range of factors including age and gender.

In addition to assessing consumer sentiment towards ADAS in the seven markets, the survey takes a deep dive into consumer perceptions in China, one of the most technologically advanced automotive markets in the world. It also examines shifts in attitudes across generations and between buyers of vehicles at different price points.

Food for Thought—and Action

To capitalize on the substantial revenue that can be derived from ADAS, manufacturers will need to consider—and act on—a variety of factors. The following discussion questions can help OEMs to assess their current situation and begin to chart a course to optimize their ADAS offerings and boost customer traction.

How can we ensure that ADAS users' education is a continuous journey?

What changes are needed to the human-machine interface, or other parts of the tech stack, so that drivers understand when, where, and how to use advanced ADAS features?

How can we ensure our product development processes respond to the fact that some ADAS features are regularly used by consumers, some are only used occasionally, and others are being deactivated?

How can we identify the specific factors driving underutilization of some ADAS features?

How can we optimize activation paths to encourage consumers to use ADAS features on a daily basis?

How can our education and communication strategies reflect differences in learning preferences across regions and demographics?

Improve Education and Close the Awareness Gap

Offering better education to consumers—both at the point of sale and afterwards—is essential if they are to start using and trusting ADAS features. As OEMs begin to consider how to optimize their ADAS offerings, user education should be a priority. At the same time, manufacturers need to improve awareness of leading-edge features that will be increasingly important in the cars of the future, and leverage ADAS technology's ability to deliver protection and a more enjoyable drive for consumers.

Optimize ADAS's position as a driver of perceived value

Alongside price, consumers put safety and comfort ahead of all other considerations when purchasing a car, according to our survey findings. So it is not surprising that improved safety is the main factor consumers take into account when selecting ADAS features for a new vehicle. **(See Exhibit 1.)** By emphasizing the technology's safety-related aspects in their branding and marketing materials, manufacturers can capitalize on the leading criterion for new car purchases.

Our survey found that the majority of respondents worldwide value the safety aspects of ADAS, as well as the comfort and convenience it provides, more than other aspects, such as the entertainment system or being more productive on a car trip. However, Chinese consumers valued the latter advantages more highly than consumers in other markets. **(See Exhibit 2.)**

China displays some additional nuances: Among Chinese consumers, status emerged as a third key consideration when purchasing a vehicle with ADAS. The social advantages of owning a car containing driver assistance features were far more pronounced than in other markets. **(See Exhibit 3.)** This finding reflects the association of ADAS in China with premium vehicles, and the greater tendency of Chinese consumers to view automobiles as status symbols.

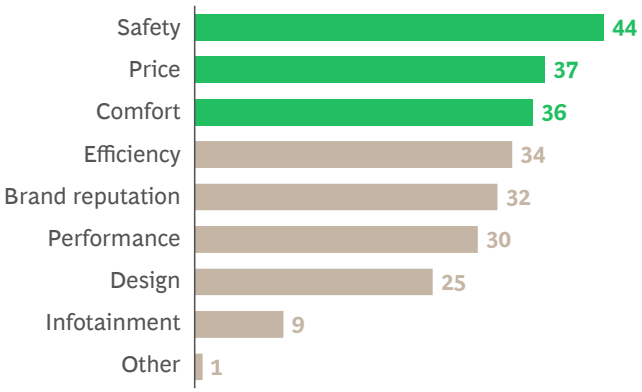
Takeaways

Because users associate ADAS with safety and convenience, it can be a powerful force for creating value in consumers' minds. OEMs should position ADAS as a technology that car owners turn to because it delivers on their desire for protection, peace of mind, and a smoother and less stressful driving experience.

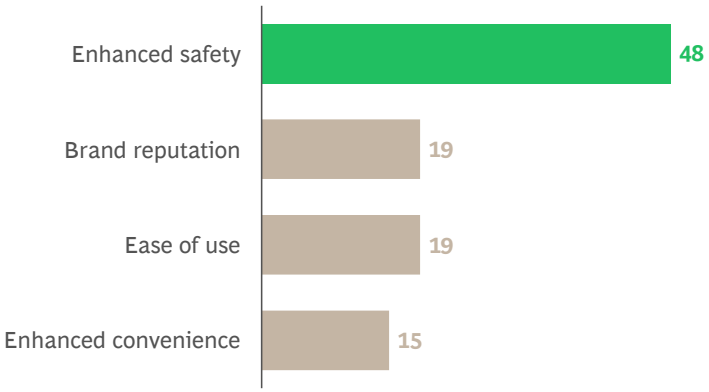
EXHIBIT 1

Safety Plays a Key Role in Decisions About Vehicle Purchasing and ADAS Features

Which factors influenced your decision to purchase or lease a vehicle the most? (%)



When selecting your driver-assistance features, which of the following benefits was the most important decision driver? (%)

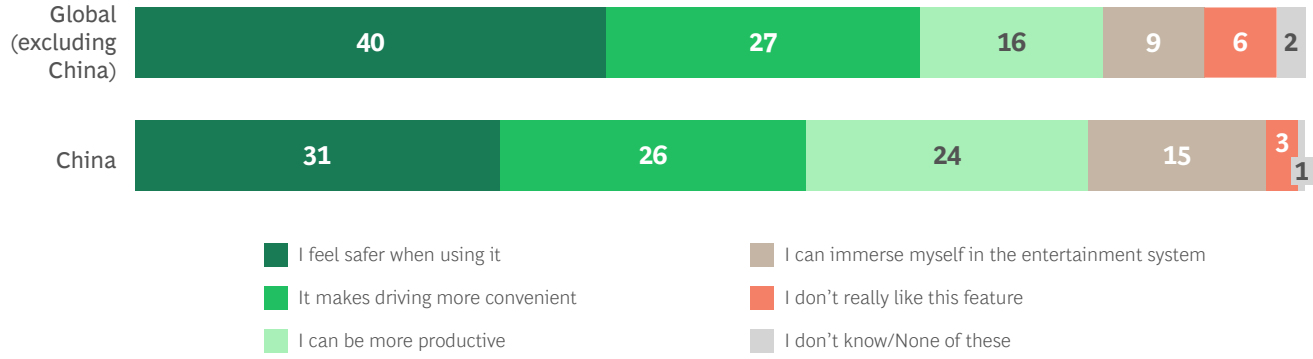


Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).

EXHIBIT 2

Using ADAS Features Makes People Feel Safer and Improves Driving Convenience

What do you like most about the driver-assistance features in your car? (%)

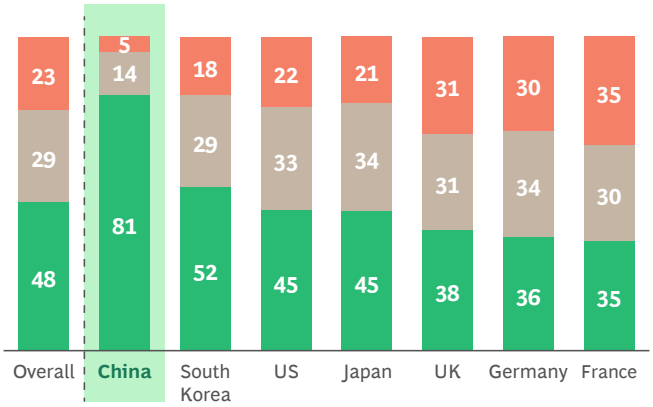


Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).

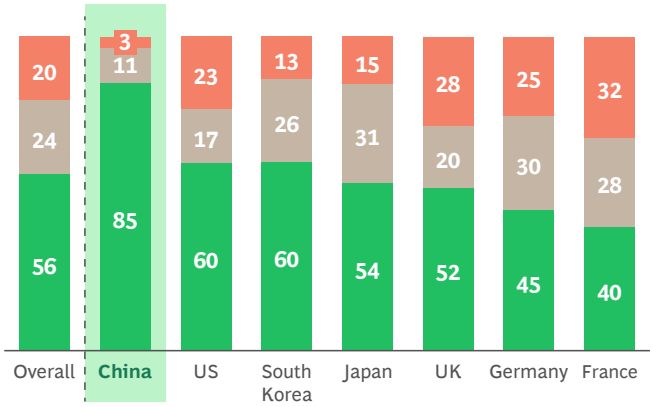
EXHIBIT 3

Chinese Consumers Believe Owning a Vehicle with ADAS Features Reflects Positively on Their Status—And Are Willing to Pay a Premium for It

How strongly do you agree with this statement: Owning a vehicle with a driver-assistance system reflects positively on my status or identity. (%)



How strongly do you agree with this statement: I would be willing to pay significantly more for a vehicle that is known to have the most advanced driver-assistance features. (%)



Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).
Note: Overall figures show linear average for all seven countries.

Close the awareness gap on cutting-edge features

Safety features are the best-known ADAS capabilities—with over 95% of respondents saying they are familiar with them—followed by driving comfort and parking features. **(See Exhibit 4.)** By comparison, cutting-edge "autonomy frontier" features, such as Urban Navigational Pilot, rank lowest for consumer awareness. This awareness gap is logical because safety features are installed in more cars than any other type of ADAS capability and are a primary driver of the technology's adoption.

ADAS complexity is also a factor. Features that are more sophisticated and involve more steps to perform their role have significantly lower levels of consumer awareness. This may be due to complex features being less prevalent in vehicles and not being explained clearly during the purchase process.

Takeaways

While high awareness is important, it does not automatically translate into active use. To use ADAS features, consumers must get to know them through first-hand experience. OEMs need to make onboarding and feature activation easier and more intuitive. This is especially relevant with autonomy-frontier features given their greater complexity and their role in the software-defined vehicle of the future, where software will control and enhance core functions using regular updates.

Create a seamless consumer education journey

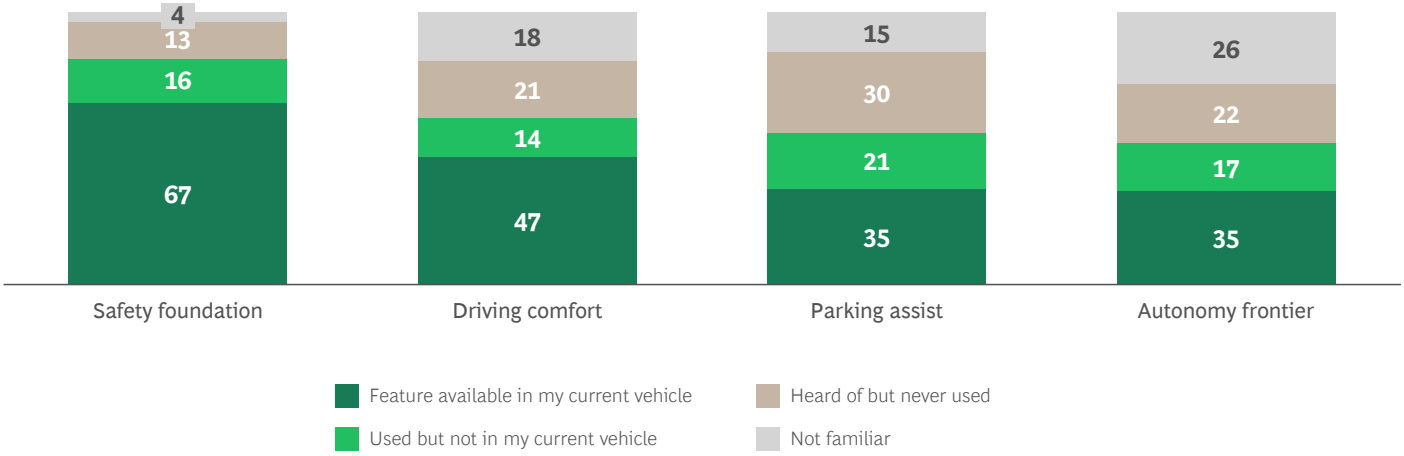
Product education is an especially pressing challenge with ADAS adoption. Consumers face two main obstacles to understanding what driver-assistance features can do and how to activate them: inconsistent onboarding at the point of sale and a lack of easily accessible information to resolve concerns post purchase. Our survey found that consumers are turning to a wide range of sources that go beyond the traditional owner's manual to answer their questions.

Excluding the Chinese market, 60% of consumers rely on sales representatives to explain how ADAS features work at the point of sale—higher than any other information source—even though reps have not been trained to do this. The figure is even higher among Chinese consumers, at nearly 65%. **(See Exhibit 5.)**

EXHIBIT 4

ADAS Awareness Is Highest for Safety-Related Features, But Declines with Complexity

Thinking about specific types of driver-assistance features, which are you familiar with? (%)

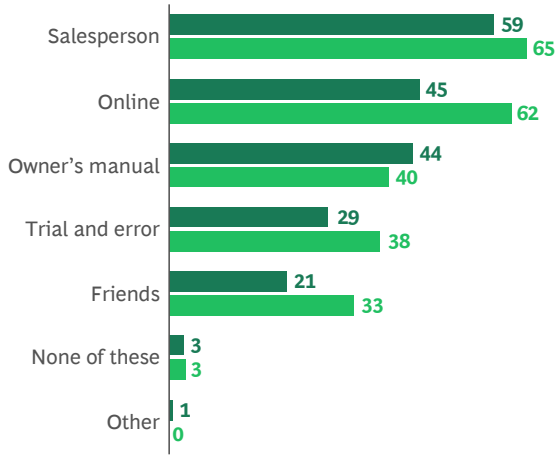


Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).
Note: Safety foundation = automatic emergency braking, lane departure warning, lane keep assist, and blind spot detection. Driving comfort = automatic cruise control, traffic jam assist, lane keep assist (hands-free), highway pilot. Parking assist = automatic parking assist, remote parking, valet parking assist. Autonomy frontier = lane change assistant (human-triggered), lane change assistant (system-triggered), urban navigational pilot.

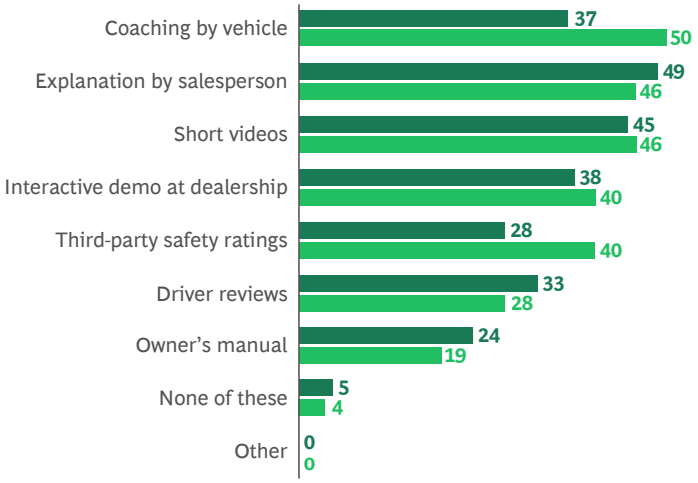
EXHIBIT 5

Users Primarily Learn About Features from Salespeople and Online Sources, with Videos and Coaching Emerging as Favored Methods

When purchasing/leasing your current vehicle, which information sources were most helpful in understanding how the driver-assistance features in your vehicle work? (%)



Thinking ahead to when you next purchase a vehicle, what would help you to make a more informed choice about the driver-assistance features? (%)



Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).

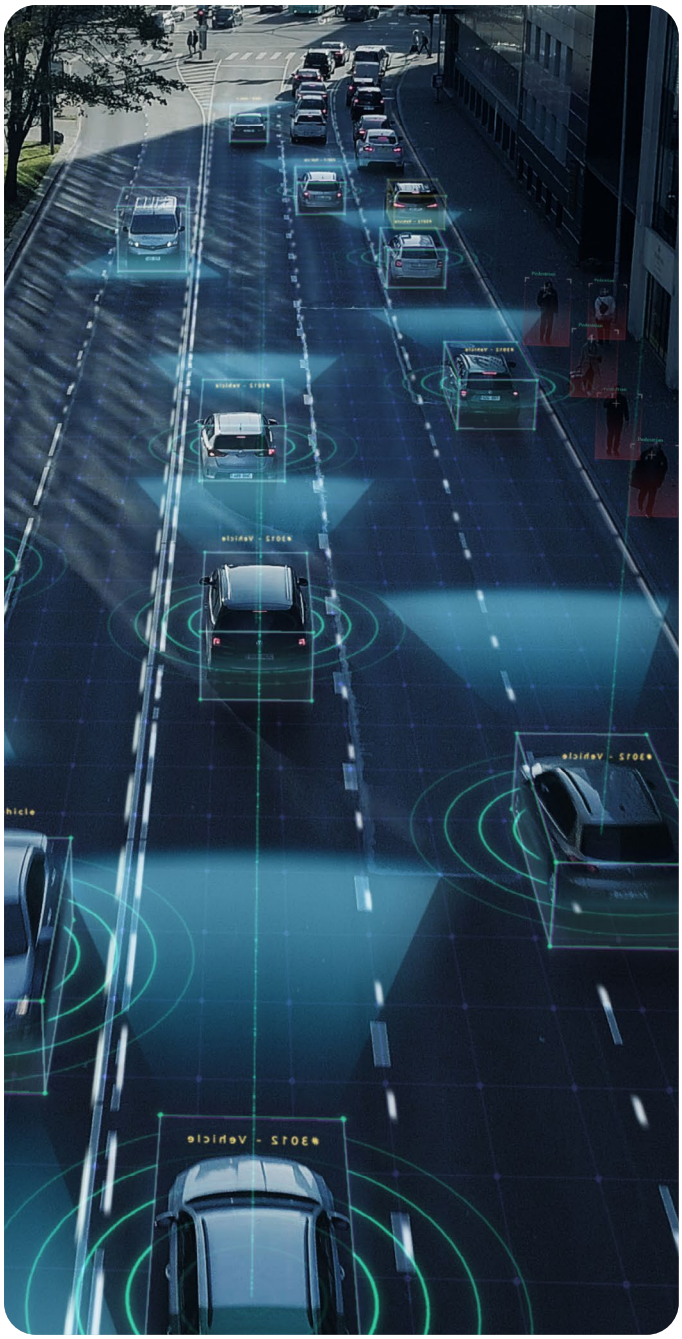
Digital resources have overtaken the owner's manual as an important source of information, with 45% of consumers outside of China going online to find an answer to their query. In China, consumers' reliance on digital—at nearly 62%—was almost as high as their dependence on sales reps.

Despite having several information sources to choose from, nearly one-third of consumers (and a higher proportion in China) use a trial-and-error approach to figure out how ADAS features work. This is a clear sign that consumers are not getting the guidance they require from manufacturers and dealers. This threatens to limit both awareness and adoption of ADAS. OEMs need to make consumer education a continuous journey that spans pre-purchase research, onboarding, and post-sale learning.

Our survey found that consumers favor learning about ADAS through short videos; first-hand explanations from a salesperson; real-time coaching by the vehicle itself while driving; or interactive demos at a dealership. OEMs that invest in these approaches are well-placed to boost both comprehension and adoption. But they should also improve their online educational resources, consider using AI digital assistants to enhance guided learning, and train sales reps about the different ADAS functions on the vehicles they sell.

Takeaways

As noted, experiencing ADAS features first-hand is essential before consumers will trust and begin using them. (**See "Key ADAS Features."**) Education is a central part of this process. Rather than relying on consumers figuring out ADAS features on their own, OEMs need to create a structured, multi-modal education offering. This should consist of both real-world elements and robust online hubs—by means of co-branded tutorials or technical deep-dives from technology creators—via OEM digital platforms.



Key ADAS Features

This report refers to a range of ADAS features. The main features described below are grouped based on their function.

Safety Features

These are designed to prevent or mitigate accidents. They include:

- **Automatic Emergency Braking**
- **Lane Departure Warning**
- **Lane Keep Assist**
- **Blind Spot Detection**

Parking Features

These features support or automate parking maneuvers and include:

- **Automatic Parking Assist**
- **Remote Parking** (which enables the driver to park from outside the vehicle via a smartphone or a button on the car key)
- **Valet Parking Assist** (which automatically drives the vehicle—with the driver still inside—from a parking facility entrance to a selected parking space, where it hands over to the Automatic Parking Assist).

Driving Features

These features are intended to enhance comfort and convenience while driving, but they often have secondary safety benefits. They include:

- **Adaptive Cruise Control** (primarily a comfort feature to reduce driver fatigue, it also enhances safety by automatically maintaining a fixed distance from the vehicle ahead)
- **Traffic Jam Assist** (which enables the vehicle to drive itself in heavy traffic by handling acceleration, braking, and steering with minimal driver supervision)
- **Lane Keep Assist** (Hands-Free)
- **Highway Pilot** (which drives the vehicle on highways and handles lane changes and merging)

Autonomy-Frontier Features

These consist of early-stage semi-automated driving capabilities and are categorized as Levels 3–5 ADAS. The main ones are:

- **Lane Change Assist (Human-Triggered)**
- **Lane Change Assist (System-Triggered)**
- **Urban Navigational Pilot** (which provides mostly autonomous driving from starting point to destination, including in urban environments, with limited human intervention)

Image courtesy of Bosch

Drive Daily ADAS Usage to Unlock Full Monetization

It's one thing for consumers to be familiar with and know how to deploy their vehicle's ADAS features; it's another for them to use ADAS on a regular basis. OEMs that fail to drive daily usage risk leaving value on the table. Here are three steps to achieve that goal.

Turn activation into a key performance indicator

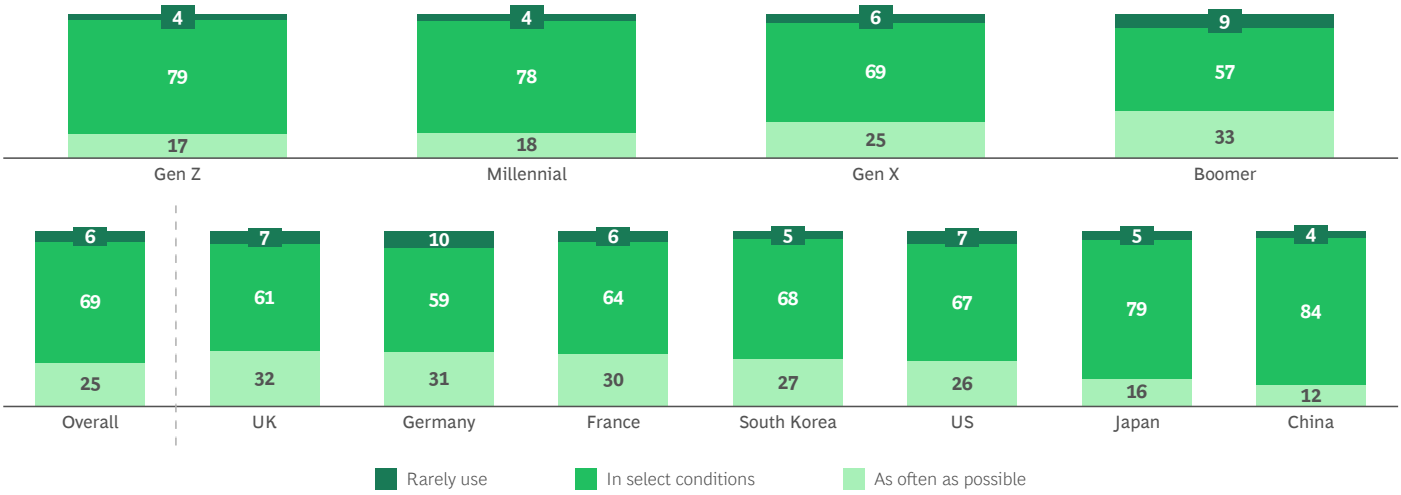
Auto OEMs need to make the frequency with which different ADAS features are actively used a key measure of success. Doing so can lead to important discoveries.

Our survey found that only about one-quarter of consumers use ADAS features as often as possible—although this varies by age group, with older generations more likely to do so. **(See Exhibit 6.)** Among consumers who aren't regular users, 38% say they do not like or need ADAS features, while 24% say they do not understand how to operate them. **(See Exhibit 7.)** This indicates that designing engaging and easy-to-use features can directly increase adoption and usage. In addition, OEMs must consider generational and regional nuances when developing adoption strategies.

EXHIBIT 6

Older Generations Are More Frequent Users of ADAS Features, with Many Using Them "as Often as Possible"

In which situations do you typically use driver-assistance features the most? (%)

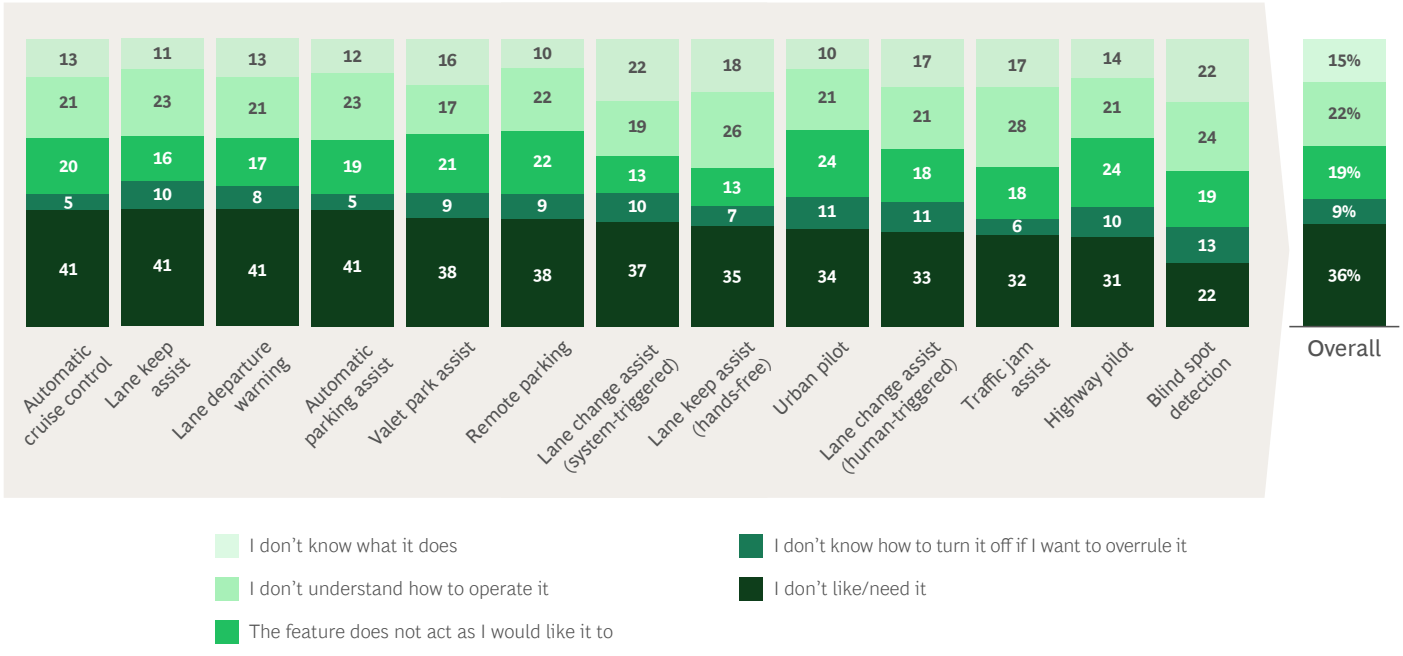


Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).
Note: Overall figures show linear average for all seven countries. Select conditions include heavy traffic (urban), heavy traffic (highways), and bad weather conditions. "As often as possible" is regardless of traffic/weather conditions.

EXHIBIT 7

Not Liking, Needing, or Understanding Features Are Significant Barriers to Usage

You indicated that you don't use the following features very regularly.
Which of the following would you say is the biggest barrier to using each feature more often? (%)



Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).
Note: Overall figures show linear average for all 13 features.

We also asked respondents to assess how regularly they use different types of ADAS capabilities—basing our sample on individuals who had these features installed in their vehicles. We found that, like awareness, regular usage is highest for safety-related ADAS features, at around 70% **(See Exhibit 8.)** Blind Spot Detection, Lane Departure Warning, and Lane Keep Assist—all safety features—came out on top. By comparison, driving comfort and parking assistance features had lower usage rates of around 60%.

Because safety is key for consumers, they are more motivated to deploy protective features than ones whose primary purpose is to enhance the driving experience, such as driving comfort and parking assistance features. Consumers appear to be more reluctant to use these features for a host of other reasons. They are more complex than safety features and, consequently, consumers often question their reliability in everyday situations. Furthermore, in many consumers' eyes, they frequently fail to solve meaningful driver issues—for example, taking longer to park a car using Automatic Parking Assist than if the driver did it manually.

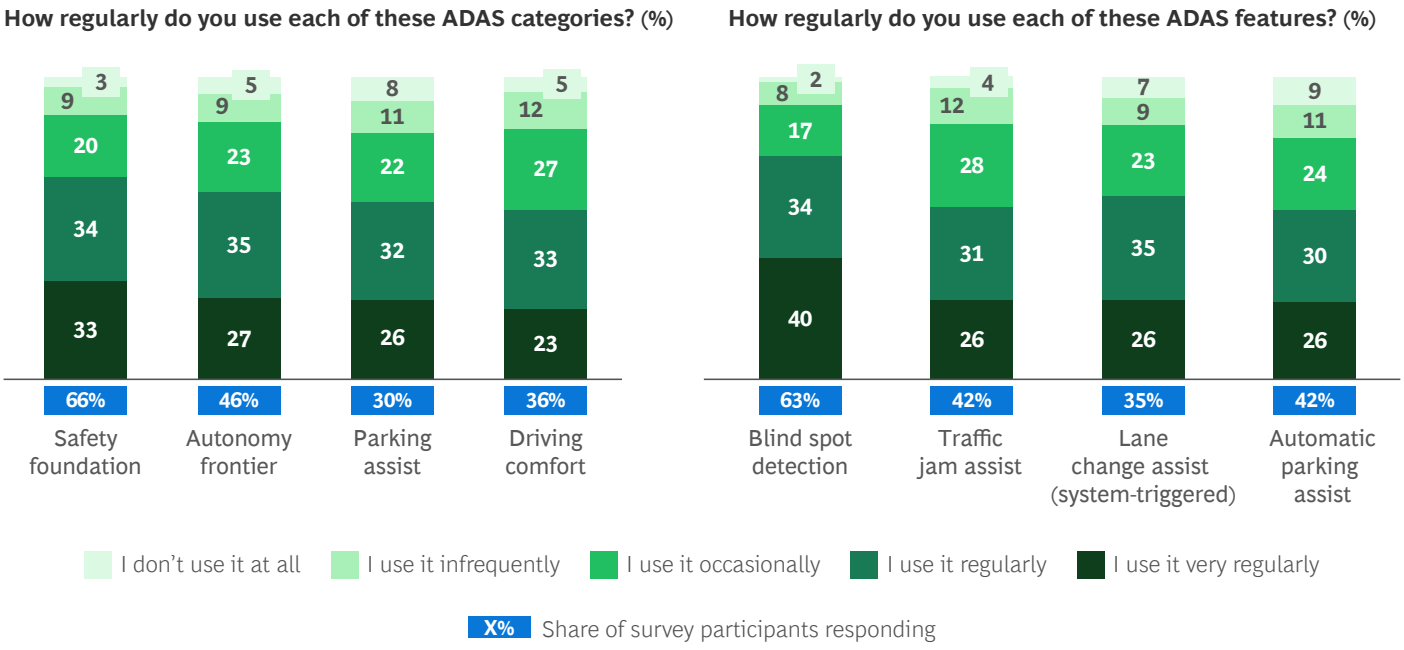
Interestingly, while autonomy-frontier ADAS is less common than other types, consumers who had these features used them more often than comfort and parking assistance capabilities. This is likely because consumers who either opt for or pay for additional ADAS functionality prioritize autonomous features and are more likely to use them.

Takeaways

Consumers tend to treat ADAS as a tool to solve a particular pain point. This explains why safety features are valued and utilized more than driving comfort and parking assistance. Nevertheless, by making ADAS activation a KPI, manufacturers can better understand the specific reasons why usage of a particular feature is lower than it could be. Once they've established which features are being underutilized, OEMs and their suppliers can take steps to improve activation by designing clear visual indicators, simple activation paths, and seamless menus.

EXHIBIT 8

Safety-Enhancing ADAS Features Are Used the Most, With Driving and Parking Features Less Popular



Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823)
Note: Safety foundation = automatic emergency braking, lane departure warning, lane keep assist, and blind spot detection. Driving comfort = automatic cruise control, traffic jam assist, lane keep assist (hands-free), highway pilot. Parking assist = automatic parking assist, remote parking, valet parking assist. Autonomy frontier = lane change assist (human-triggered), lane change assist (system-triggered), urban navigational pilot.

Fix false-positives before scaling ADAS technology

Reliability issues with ADAS remain widespread. Over 40% of survey respondents have experienced false-positive interventions while driving. These include so-called phantom braking: automatic emergency braking systems triggering in reaction to a non-existent obstacle in the road.

Such incidents can lead to high-profile external investigations and damage already fragile public trust in the ability of ADAS to navigate complex real-world driving conditions. In France, for example, the government is investigating a series of crashes that have been attributed to phantom braking.

Our survey found that owners of premium vehicles and Gen Z consumers expect near-perfect performance from ADAS technology and are the least forgiving when it fails them. Some 16% of premium vehicle owners and 9% of Gen Z consumers permanently disabled ADAS features following a false-positive incident, compared with an overall average of 7% across all respondents. **(See Exhibit 9.)**

This is hardly surprising with premium consumers as they generally have high performance expectations that match the high price they pay for their vehicle. It is somewhat more surprising with Gen Z consumers, who generally are considered to be more attuned to tech and thus would be more forgiving. However, it may be that they have such high expectations for technology that they become especially irritated when it goes wrong.

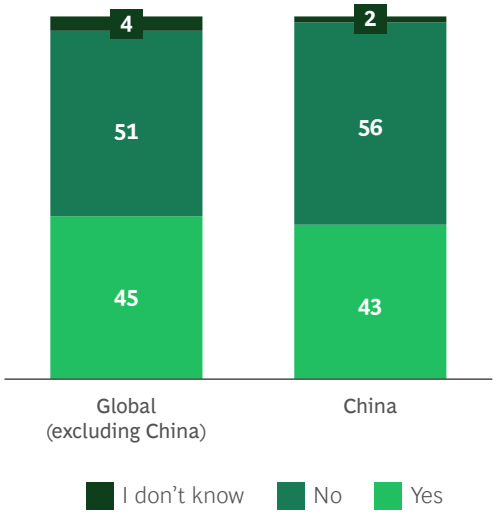
Takeaways

Manufacturers must make reliability a core brand value and tackle false-positive incidents before scaling their ADAS operations. Such an approach aligns with calls from organizations such as the UK's Global New Car Assessment Programme for more representative real-world use case assessments that move beyond controlled test track environments. False-positive incidents are far more than a technical nuisance; they pose a reputational risk that damages consumer confidence, limits usage, and undermines monetization.

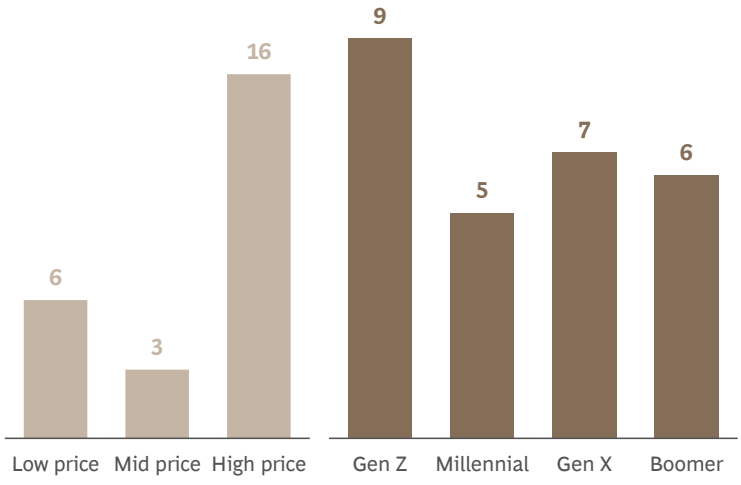
EXHIBIT 9

Unnecessary Interventions Erode Trust in ADAS Features, Particularly Among Gen Z and Premium Vehicle Owners

Have you ever experienced a driver-assistance feature intervene or stop its task unnecessarily while you were driving your vehicle (e.g., sudden braking)? (%)



What action, if any, did you take afterwards? Responses for "I permanently disabled the feature." (%)



Make explainability central to human-machine interfaces

Our survey found that consumers are far more likely to use ADAS technology regularly if they can understand how it works and the basis for its decisions. Over 60% of participants said it was either very important or extremely important to know what their vehicle's ADAS system was doing and why—with the response about equal in China and the rest of the world. **(See Exhibit 10.)**

Most consumers want their vehicle to allow them to see what the ADAS system's sensors perceive. They also want feedback from their ADAS system that is transparent, predictable, and primarily in real time. By putting these elements in place, OEMs can reduce consumers' reluctance to rely on algorithms; increase trust and lower driver anxiety, particularly during complex real-world driving situations; and boost usage levels.

Overall, consumers worldwide are in favor of introducing measures, such as short messages, to help them understand their ADAS system's decisions. Chinese consumers, in particular, preferred real-time visual displays, verbal cues, and a timeline of key decisions post-drive. A significant proportion of consumers worldwide are also in favor of innovations that explain system limitations or highlight when an ADAS system is unsure about the best course of action.

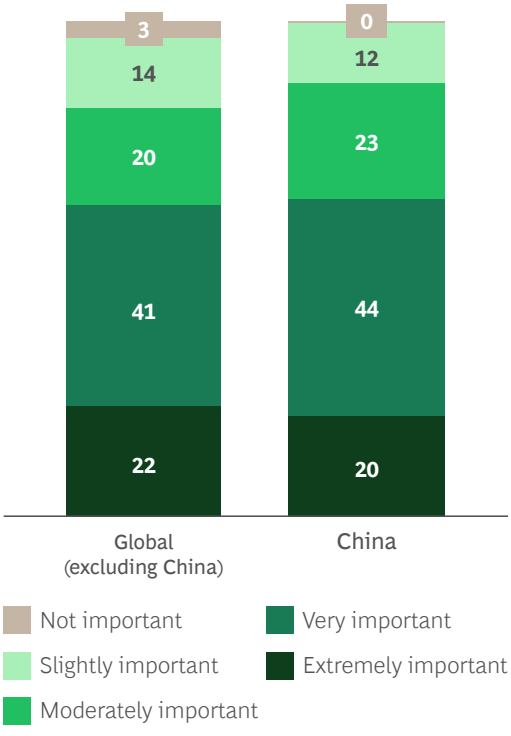
Takeaways

Manufacturers should augment the functionality of ADAS systems so that they are better at explaining to the driver what they are doing and why. Digital visualizations of the surrounding environment, clear intent cues, and simplified status messages can encourage consumers to use ADAS features throughout their journey.

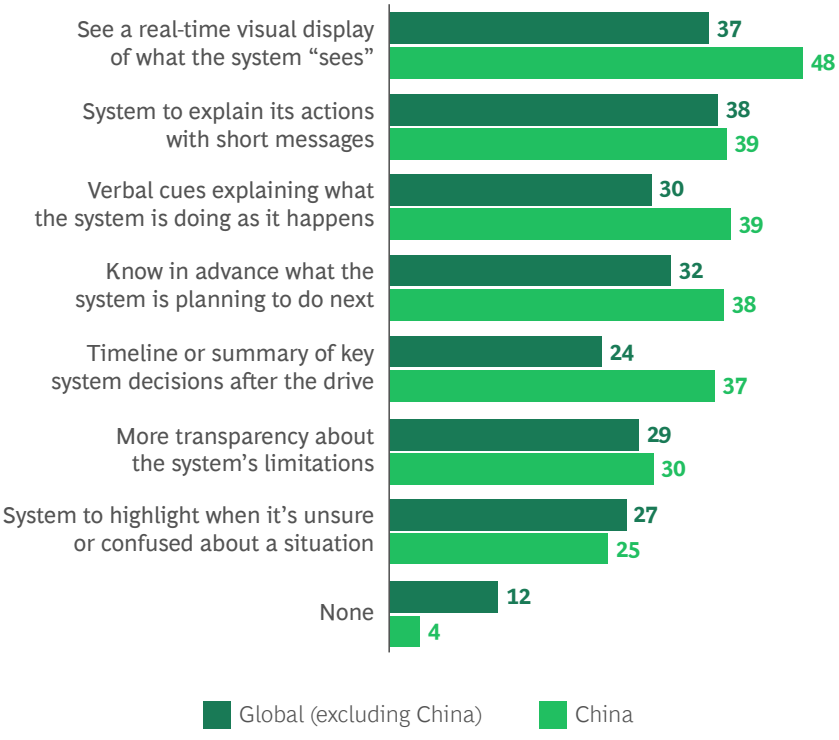
EXHIBIT 10

System Transparency Is a Key Part of Better Consumer Understanding

How important is it to know what your driver-assistance system is doing and why? (%)



What changes to your driver-assistance system would help you to better understand the decisions it takes? (%)



Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).

Leverage Simple Pricing, Packaging, and Communications

As ADAS enters the mainstream, monetization is emerging as the next competitive frontier for auto OEMs. Greater consumer trust and better design and education are important to boost uptake of ADAS features, but getting pricing, bundling, and product naming right is central to turning adoption into profit.

Most OEMs are currently flying blind when it comes to optimizing these elements. However, our research shows that consumers have clear preferences about how they want to pay for ADAS features and how they want them to be packaged. Furthermore, we found significant differences in perception regarding value-for-money among buyer groups. In addition to being more likely to disable features, Gen Z consumers and premium vehicle owners were also more likely to feel they had overpaid for ADAS benefits. **(See Exhibit 11.)**

Creating compelling value propositions is clearly an urgent task for manufacturers. Our findings indicate that the solution lies in understanding what different buyer groups want from pricing options, bundling, and product names; adapting manufacturer offerings to these preferences; and giving consumers greater control.

Build greater transparency and flexibility into pricing and bundling

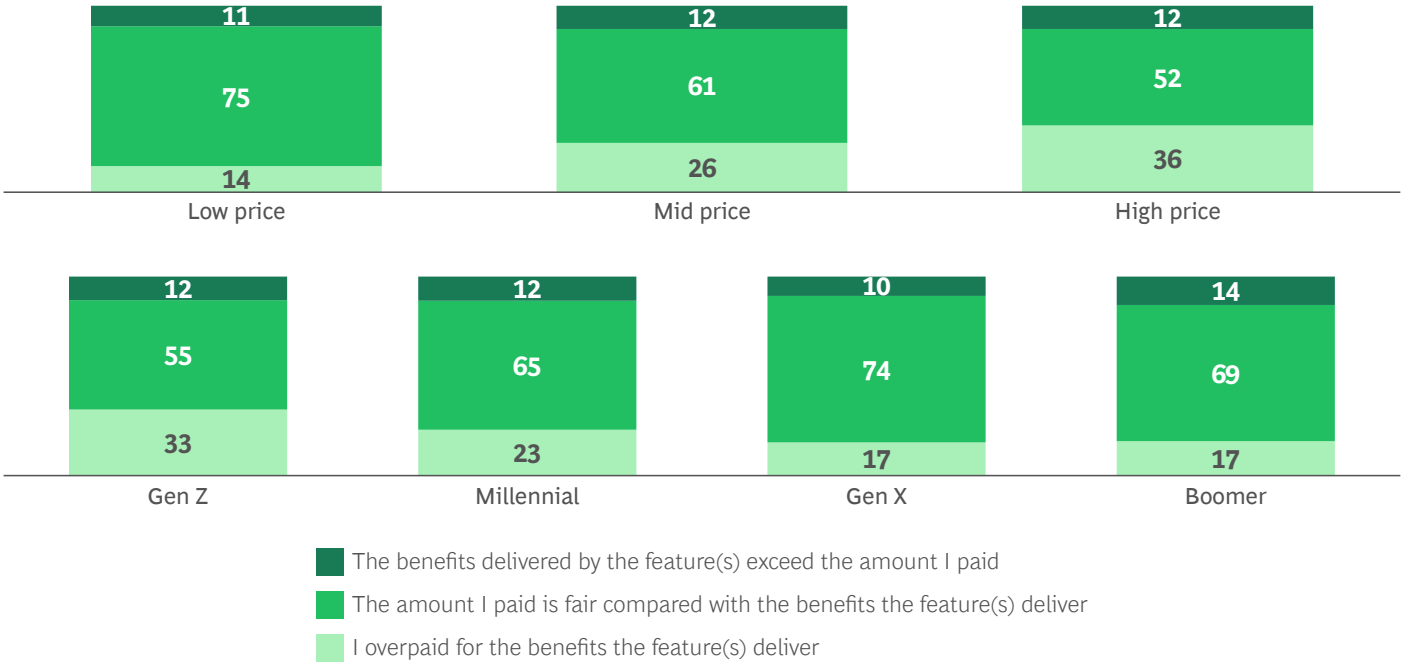
Consumers expect the same approach when paying for ADAS features as with any other digital products. They want pricing and bundling options to be simple, modular, and personalized. Indeed, we found that the majority of consumers would prefer the cost of ADAS to be included as part of the vehicle purchase price over paying a monthly subscription fee.

This preference to avoid regular payments for ADAS varies by group. For example, Gen Z and Millennial consumers were more open to a subscription model. So too were consumers who financed a vehicle rather than purchasing it outright. **(See Exhibit 12.)** This group appears more comfortable with including an ADAS add-on in their monthly finance payments, whereas outright purchasers are more inclined to view subscription fees as representing an unwelcome ongoing charge. Nevertheless, including ADAS with the cost of a vehicle is the preferred model across all groups.

EXHIBIT 11

Younger Generations and Premium Car Buyers Are More Likely to Feel They Overpaid for ADAS Features

Do you feel your driver assistance features represent value for the money? (%)

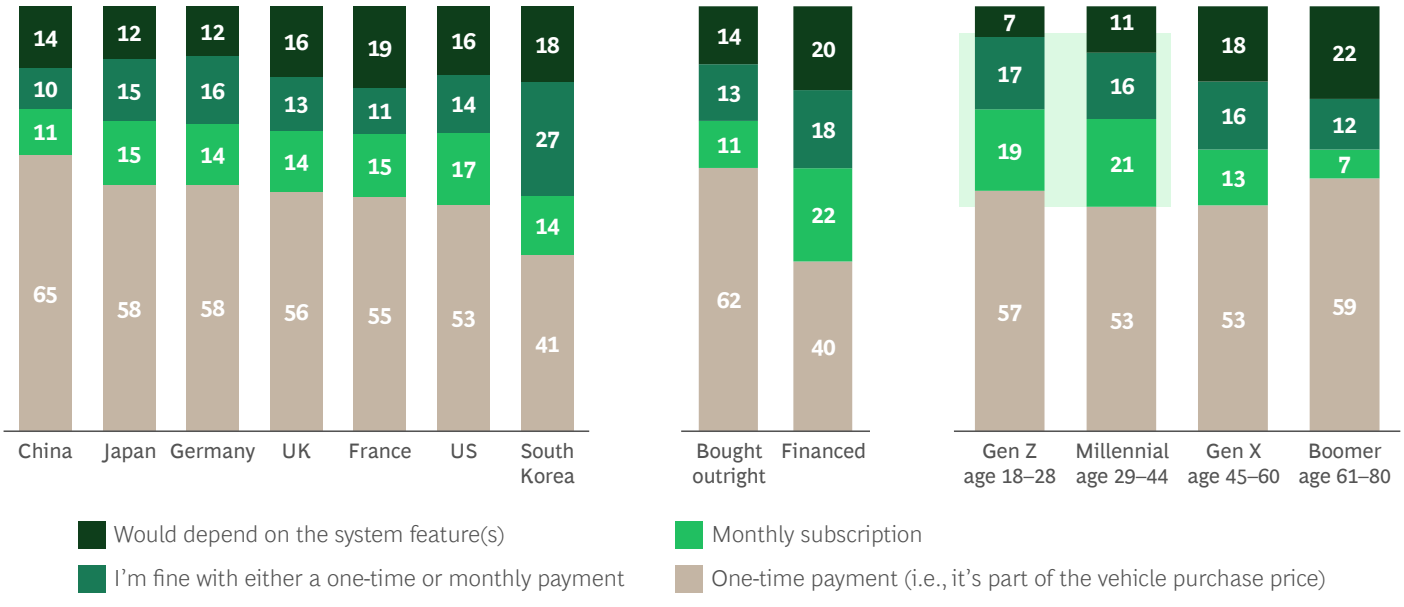


Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).

EXHIBIT 12

Most Prefer ADAS Cost Included in the Vehicle Price, Although Younger and Financed Buyers Are Open to Subscriptions

When paying for a driver-assistance system, what is your preferred option? (%)



Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).

The message was equally clear when we asked survey respondents how they would like ADAS features to be bundled. Consumers want to understand what they are paying for and not be required to pay for features they don't need. Outside China, consumers favor paying for ADAS features individually, whereas Chinese consumers prefer to pay for packages exclusively comprising driving assistance features or parking features. **(See Exhibit 13.)** But across all markets, consumers reject having to pay for vague "technology bundles" made up of both ADAS and non-ADAS features (such as a better entertainment system or a more comfortable seat).

Takeaways

Manufacturers should introduce more transparent bundling options that avoid mixing ADAS with other technologies, and provide more flexible pricing and payment structures. By doing so, they can give buyers greater control over how they select and pay for ADAS features. This has the potential to be particularly effective with Gen Z consumers and premium car owners. Fortunately, both actions are relatively easy fixes.

Select straightforward, descriptive names to enhance trust

While creative departments may be relucant to hear it, we found that consumers prefer names for ADAS features that describe clearly what the feature does. About 63% of respondents worldwide favor literal names—such as Lane Keep Assist or Blind Spot Detection—over marketing-driven labels that were often overly complex, brand-dependent, or ambiguous. **(See Exhibit 14.)** We found that such labels could be misinterpreted as representing entertainment options rather than driver-assistance features, and risk undermining trust in ADAS technology.

Some geographic differences did emerge, revealing localized attitudes towards safety and technology. For example, Chinese consumers are ahead of those in other countries in preferring names for safety features that underline their protective benefits.

Takeaways

Naming ADAS features should be treated as an opportunity to develop consumer understanding and trust rather than simply a marketing exercise. Straightforward, descriptive names work best across markets. The automotive industry—and consumers—would benefit from introducing ADAS naming conventions that emphasize clarity.

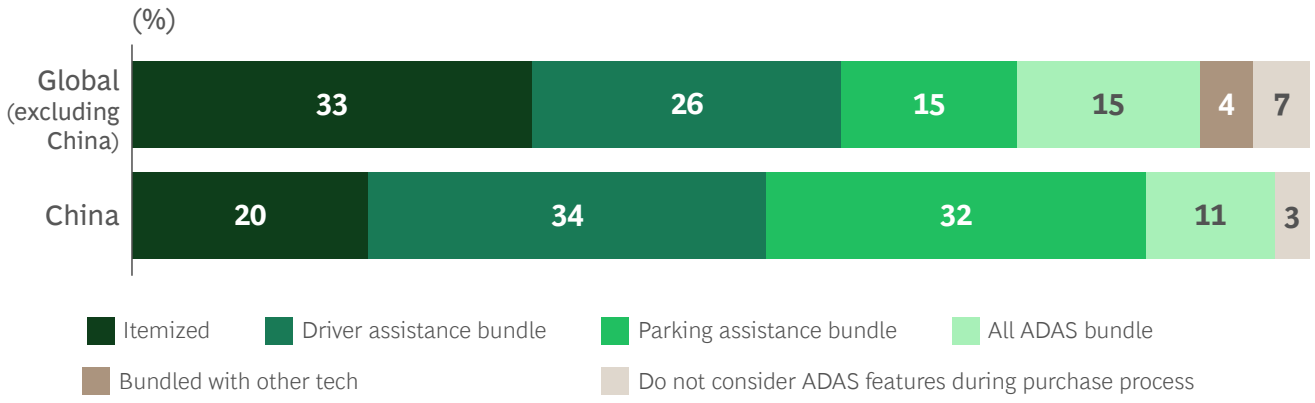
Use top-tier supplier branding to reinforce consumer confidence

Knowing that an ADAS system has been supplied by a well-known technology company can provide a significant boost to consumer confidence. Nearly one-third of consumers outside China—and over half of respondents in China—say that knowing their car's ADAS was built by a leading multi-domain supplier would increase their trust in the system. Knowing that it came from a dedicated ADAS supplier also increases trust, but to a lesser extent. **(See Exhibit 15.)**

Although this would be considered a latent driver of consumer trust, it presents an opportunity for OEMs. Like the "Intel Inside" effect in personal computing, naming a respected supplier brand on a vehicle's ADAS system can increase consumers' willingness to pay for features and improve their perception of the system's safety and reliability.

EXHIBIT 13

Consumers Want Clearer Bundling and Itemization of ADAS Features

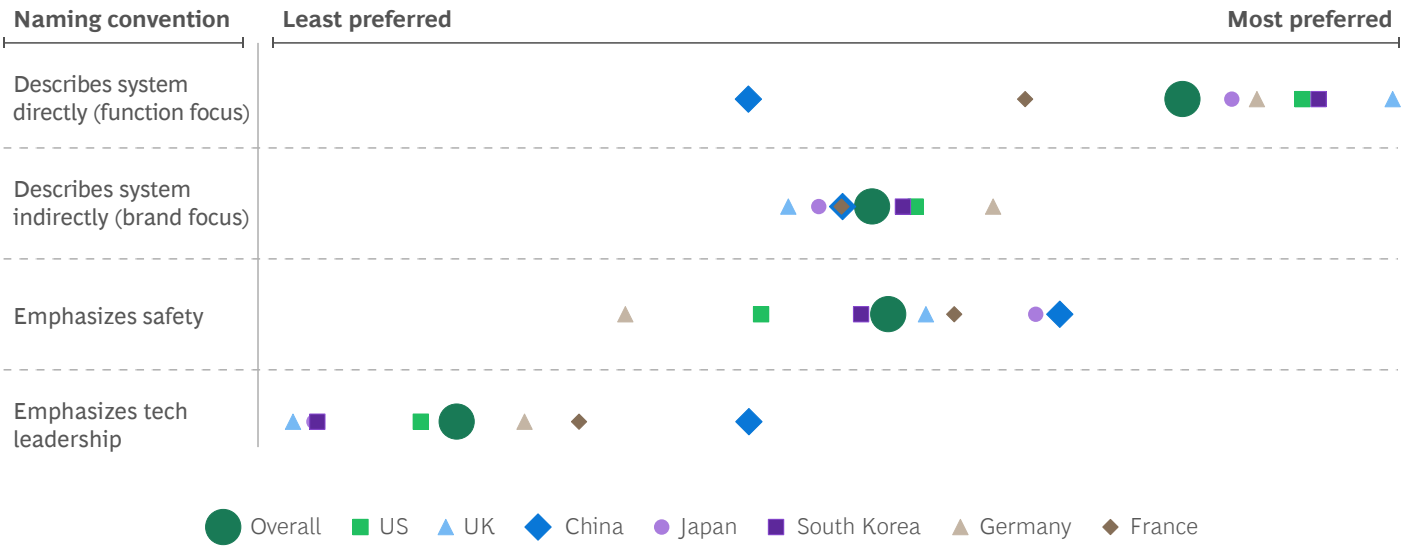


Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).

EXHIBIT 14

Most Consumers Prefer Names That Clearly Describe What an ADAS Feature Does

Which of the following naming approaches for driving-assistance features do you prefer?

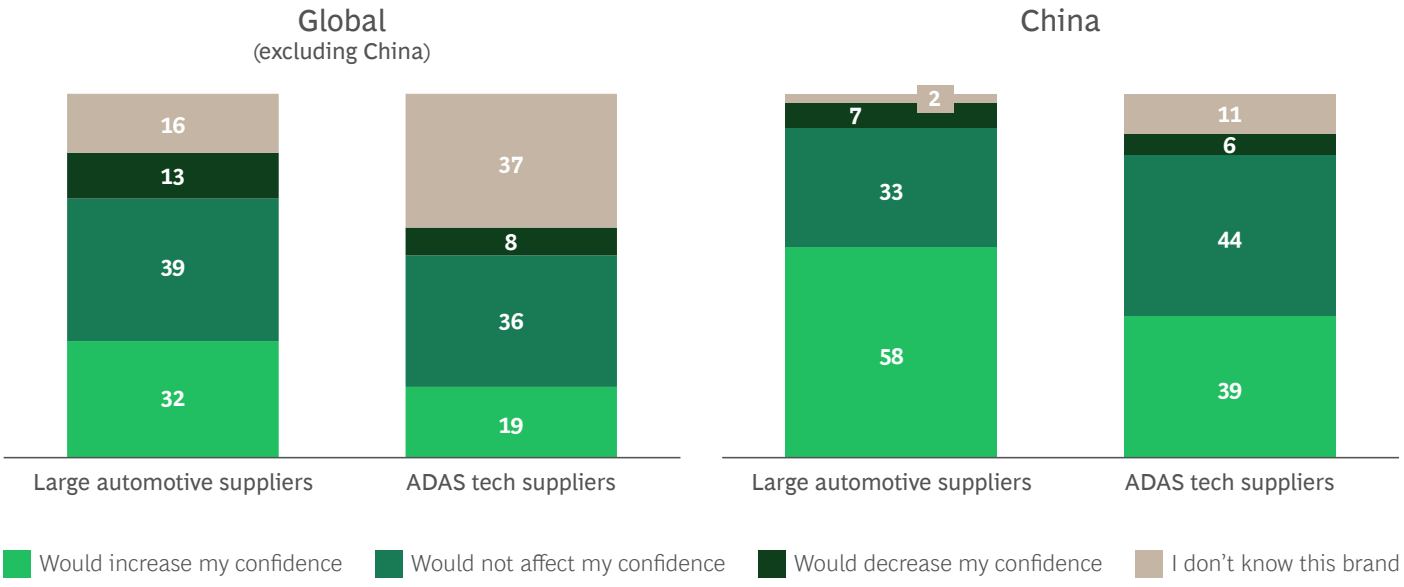


Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).

EXHIBIT 15

Supplier Branding Has a Positive Impact on Consumer Perceptions

If you knew that the driver-assistance system in your vehicle came from a leading supplier brand, which type would most increase your confidence in the system? (%)



Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).

Takeaways

Manufacturers should leverage supplier credibility both in their marketing efforts and in the branding on human-machine interfaces to boost consumer trust and confidence and improve purchase conversion. This will require suppliers to support OEMs through co-branding strategies that highlight their role in ADAS development, given limited public awareness of supplier contributions.

Apply the "AI-powered" label sparingly

More and more ADAS systems, especially those attaining higher SAE automation levels, are end-to-end AI stacks. This raises important questions about consumer attitudes towards systems that are described as "AI-powered."

We found that labeling a system in this way tends to polarize opinion among consumers. Worldwide, about one-third of respondents trust a system labeled AI-powered more than an identical system that doesn't have this label, while a significant proportion (17% of Chinese consumers and 25% of consumers elsewhere) say they would trust the AI-powered system less. At the same time, nearly half of Chinese consumers say they would trust both equally. **(See Exhibit 16.)** Significantly, 80% of Chinese consumers say they would trust an AI-based ADAS system equally or more than a deterministic system—compared with 65% of consumers outside China.

Premium-vehicle buyers, in particular, are more likely to assume that the use of AI leads to better performance and an improved outcome, whereas respondents who expressed less trust in the use of AI saw it as a source of opaque "black box" risk. However, learning that a car with AI-powered ADAS had been involved in a fatal accident substantially eroded trust in AI-labeled driver assistance systems across all markets. This suggests that consumer trust in such systems is fragile.

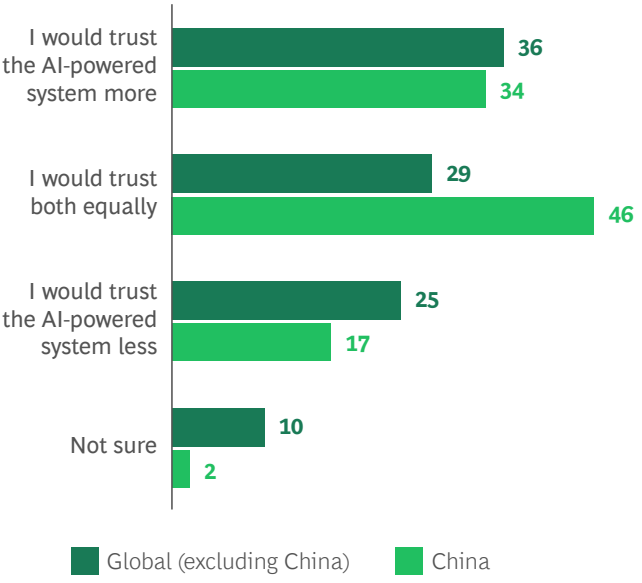
Takeaways

Given the polarizing effect it can have, manufacturers should use the term "AI-powered" sparingly and adopt a careful, nuanced approach that takes into account different levels of trust across regions. Where they do adopt this messaging, they will need to support its use with clear evidence of the rigorous engineering behind AI technology and the enhancements in performance and outcomes that it brings.

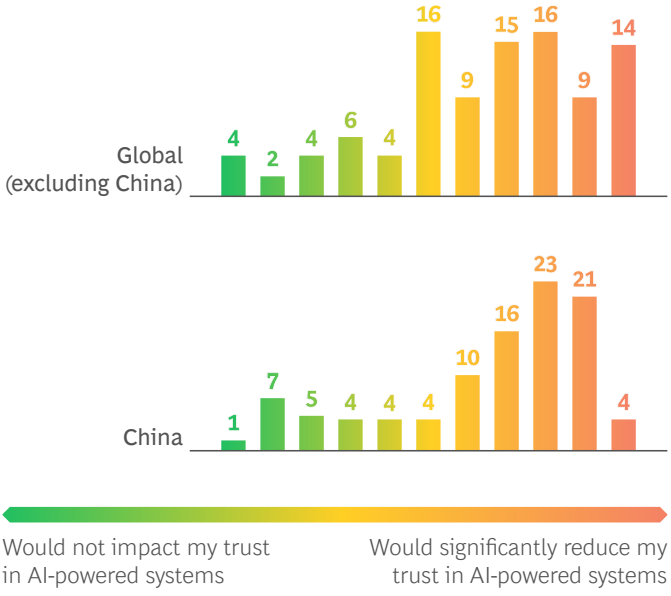
EXHIBIT 16

Labeling an ADAS Feature "AI-Powered" Can Boost Trust—But That Trust Can Be Quickly Eroded

Imagine that two identical vehicles have similar driver-assistance systems. One is described as "AI-powered," the other is not. Assuming their performance and capabilities are the same, which would you trust more? (%)



Imagine you were to read a news story about a fatal car accident that involved a driver-assistance system. If you also read that the driver-assistance system involved was AI-powered, how would that influence your perception?[1]



Source: BCG-Bosch Consumer Sentiment Survey (n = 2,823).
[1]Frequency of responses across the scale.

Image courtesy of Bosch

The Bottom Line: Take a Localized Approach

There are many actions that manufacturers can take to increase consumer awareness and use of ADAS technology. But the lesson for OEMs is that they can't rely on a one-size-fits-all ADAS strategy. To succeed in different markets, manufacturers will need to adapt their approaches to different preferences and expectations among different countries and demographics.

For OEMs, the primary challenge of ADAS has shifted from mastering the technology to maximizing monetization. Our survey shows that consumers are willing to pay a premium for advanced ADAS features. On the flip side, however, every feature that is unclear or does not actually solve a driver's pain point risks eroding OEMs' profit margins.

Here are three overarching actionable steps—based on our survey findings and built around the customer journey—that OEMs need to take to boost ADAS adoption.

Pre-Purchase: Build Value and Trust
Focus on naming ADAS features clearly, leverage supplier credibility, and utilize marketing approaches that emphasize safety and reliability.

Point of Sale: Enable the Purchase
Prioritize training sales staff to be more knowledgeable about ADAS features and offering simple, transparent bundling and pricing.

Post-Purchase: Drive Adoption and Loyalty
Focus on multi-modal education (including online hubs and in-car coaching), make activation a core KPI, and improve reliability to prevent feature deactivation.

Manufacturers that take these steps to build trust and encourage daily usage, while also tailoring their offerings to regional preferences, will be best placed to capture the considerable value that ADAS has to offer. Furthermore, by solving the ADAS monetization challenge, they can open a gap over rivals in the increasingly tough global automotive market.

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