Press release

December 15, 2025
C/CGR-JP-2025-22

Bosch conducts a survey on peoples' "expectations for software-defined vehicles"
About 75% of respondents are looking forward to SDVs: software development enabling cross-industry collaboration is essential for realizing SDVs

Key findings

- Awareness of software-defined vehicles (SDVs) stands at just under 20%.
- However, when presented with potential vehicle functions and the future of mobility enabled by SDVs, about 75% showed high expectations for SDVs.
- Respondents look forward to functions and services in SDVs such as “reducing driving burden,” “driving skill assistance,” and “enhancing safety”
- Christian Mecker, president and representative director of Bosch Corporation: “To realize SDVs, it is essential for the industry to collaborate across boundaries, defining competitive and cooperative areas to accelerate software development.”

Yokohama, Japan – Bosch, the Japanese subsidiary of Robert Bosch GmbH, a leading global supplier of technology and services, conducted a survey in Japan on expectations for software-defined vehicles.

The survey showed that awareness of software-defined vehicles (SDVs) remained at just under 20% (17.6%). However, upon learning about the functions and services SDVs could potentially deliver - such as reducing driving burden, assisting driving skills, and enhancing safety - approximately 75% (74.4%) of respondents said they look forward to SDVs.

“As a partner to automakers, Bosch is developing various solutions with software to resolve the challenges and stress end-users experience in vehicles. However, this requires collaboration that goes beyond the boundaries of various industries - not just automakers and suppliers, but also IT, government, infrastructure, and others,” said Christian Mecker, president and representative director of Bosch Corporation. “To achieve this, it is essential to clearly define competitive and cooperative areas to accelerate software development. By leveraging its strengths in software development and the intelligent hardware to bring it to life, Bosch is collaborating with diverse partners to advance the realization of SDVs.”

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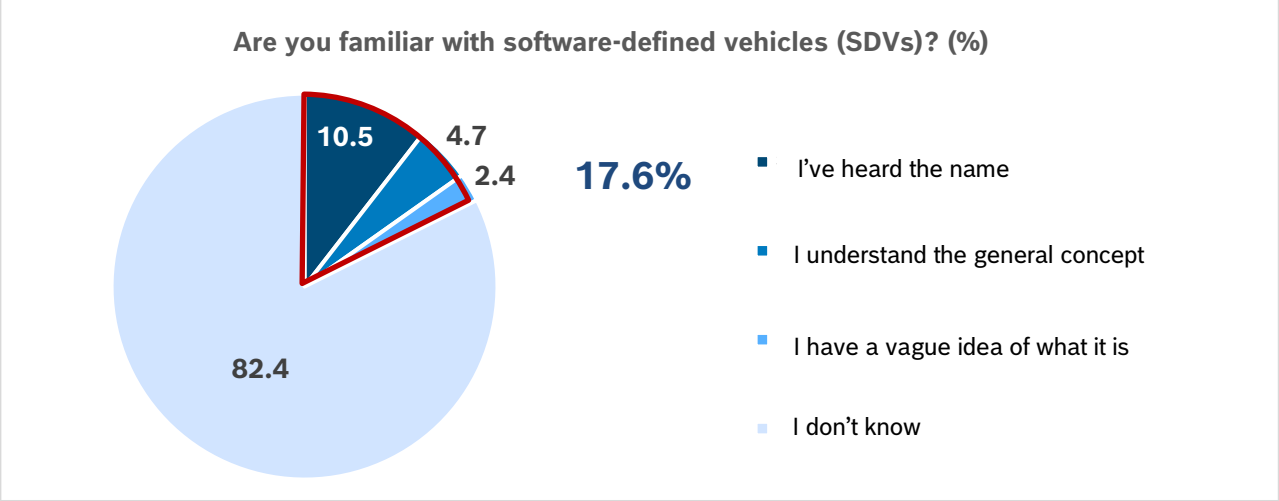
The survey results are as follows:

Awareness of software-defined vehicles is just under 20% (17.6%)

When asked, “Are you familiar with software-defined vehicles (SDVs)?”, a total of 17.6% selected “I understand the general concept (2.4%)”, “I have a vague idea of what it is (4.7%)”, or “I’ve heard the name (10.5%)”. **This indicates SDV awareness is just under 20%.**



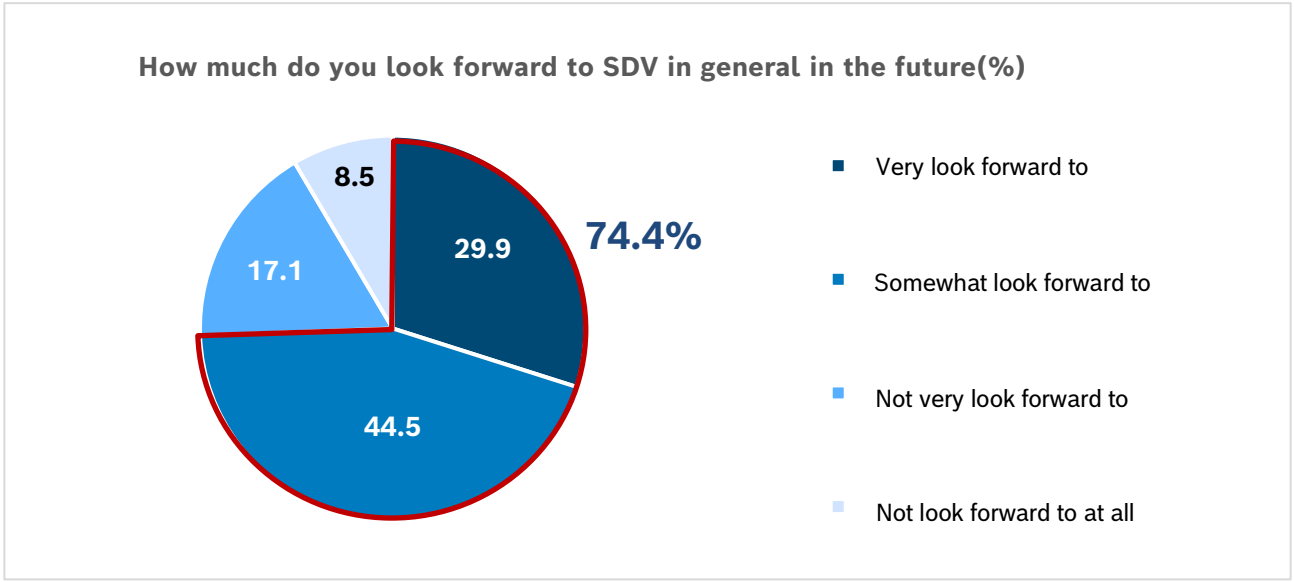
Expectations for SDV functions and services: High anticipation for driver assistance, burden reduction and enhancing safety

When presented with specific examples of functions and services, the total number of respondents who selected “Very look forward to SDVs” or “Somewhat look forward to SDVs” is as follows. Overall, **consumers have high expectations for SDVs to deliver functions such as “reducing driving burden,” “assisting driving skills,” and “enhancing safety.”**

The future of mobility functions and services enabled by SDVs	Total
Safer than ever before	77.0%
Safer driving through enhanced external information integration	74.2%
More cost effective (software reduces complex wiring and vehicle weight and improves fuel efficiency)	73.8%
Shorter inspection and repair time (wireless software updates)	73.4%
Easier to park than ever before	73.1%
Easier to drive than ever before	71.7%
More attentive than ever before (Suggest breaks based on the driver's condition)	70.9%
More interior space	70.7%
More advanced automated driving (Reaching destinations without driver input)	67.8%
Over-the-air updates from home or inside the car	63.2%
Personalized driving, enabling to switch to your preferred driving modes and environments, in the same car	60.8%
Personalized driving, enabling to switch to your preferred driving modes and environments, in any car and anyone’s car	60.6%
Verbal interaction with the car (enabling to automatically adjust AC when drivers say, “It's cold,” etc.)	53.5%

A three-out-of-four majority (74.4%) look forward to SDVs.

Finally, after presenting the potential vehicle functions and future of mobility enabled by SDVs as described above, **about 75% (74.4%) of respondents - a three-out-of-four majority - indicated they look forward to SDVs.**

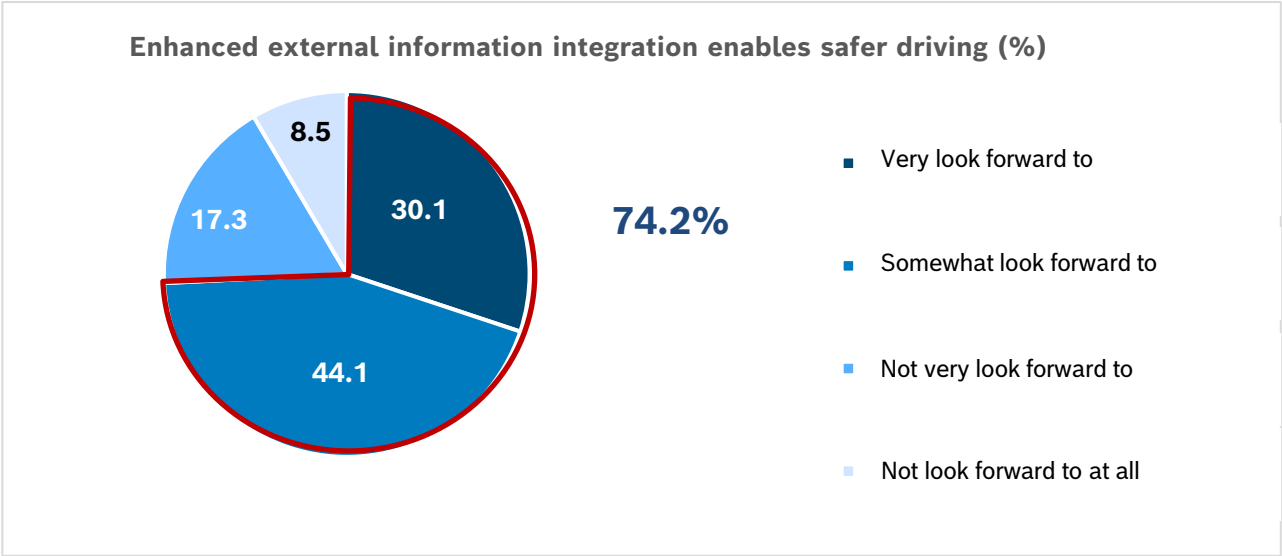


Bosch is pursuing development and initiatives to realize functions consumers expect for SDVs, as identified in this survey. The development of the "Palette Garage Assist System" (a driver assistance system for mechanical parking garages) to support easier parking and the "Easy Turn Assist" function to support easier driving, are part of the examples. By-wire technology enables more interior space, while "Vehicle Motion Management" allows the same vehicle to switch between different driving modes and environments to suit the driver's preferences.

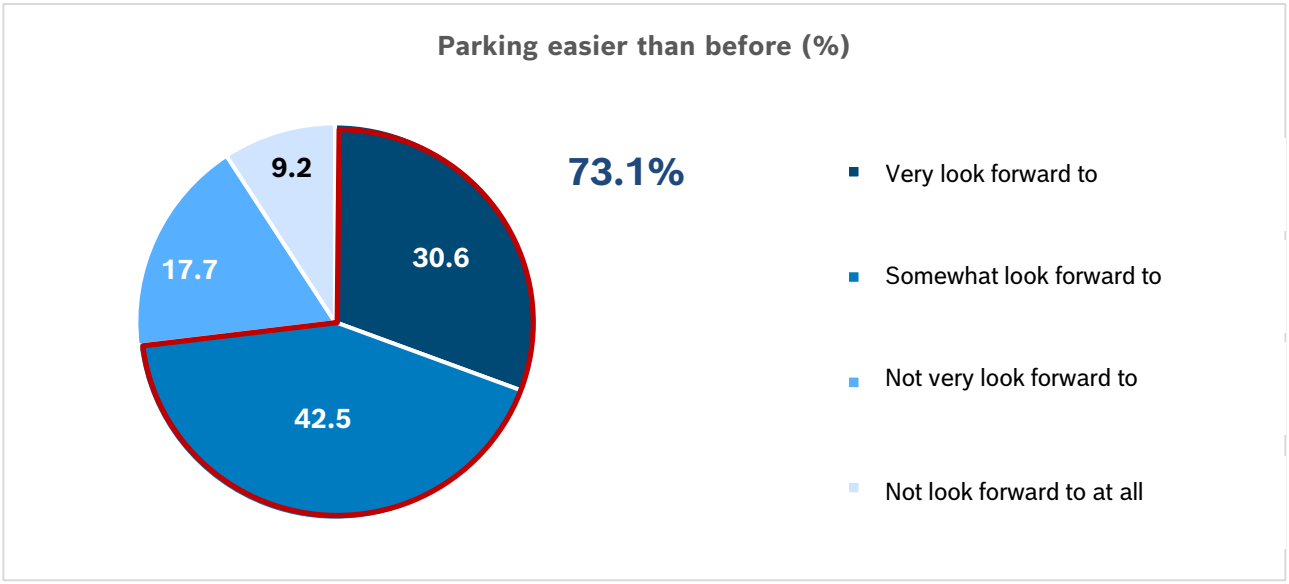
Bosch is already pursuing the development of both the software consumers demand and the hardware that enables it. Bosch is dedicating its efforts to realizing SDVs not only by pursuing development within the company but also through collaboration with external partners.

Appendix: Detailed survey results on anticipated functions and reasons.

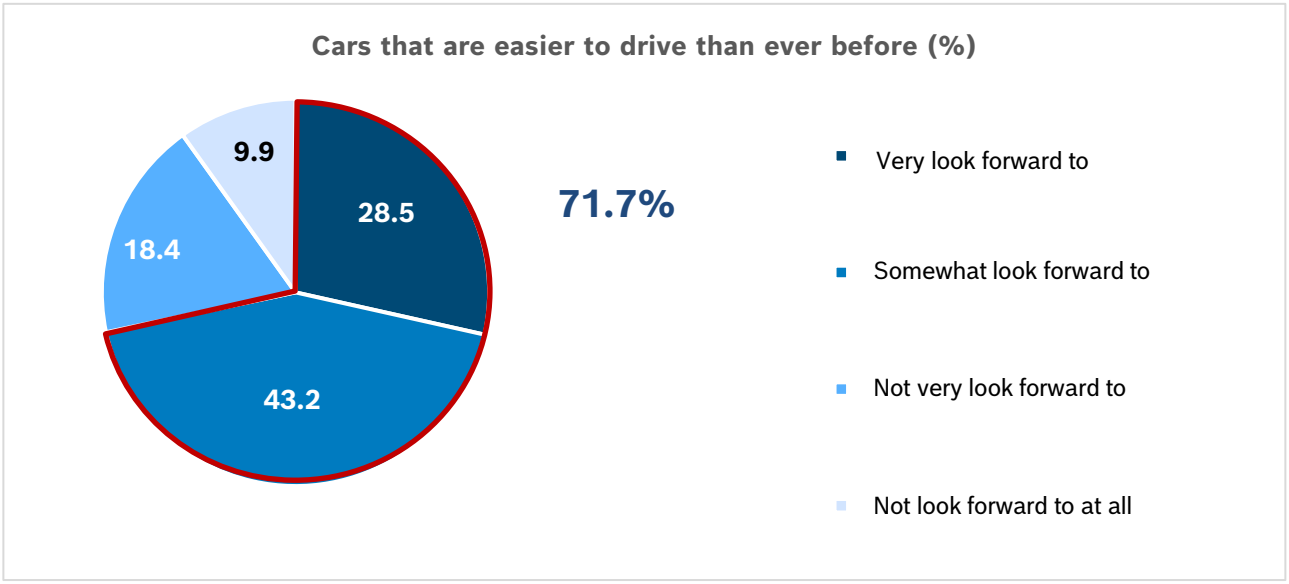
74.2% of respondents answered they look forward to functions enabling safer driving through enhanced external information integration. Examples included: "Detecting vehicles driving in the wrong direction and warning both the vehicle and surrounding traffic" and "Connecting to external information to detect sudden changes in conditions like weather or accidents, enabling route or destination changes." Reasons included: "Even a safe road can become flooded or collapse during heavy rain. It would be good to know about such changes," and "Reducing accidents and traffic jams would likely enhance overall social safety and comfort."



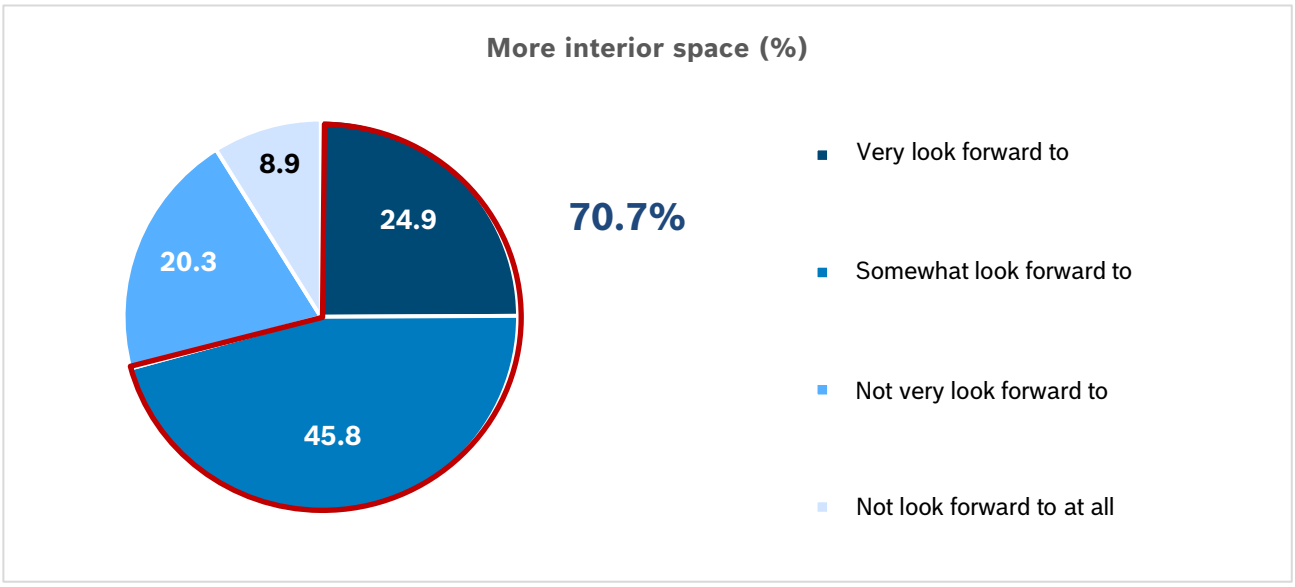
73.1% of respondents answered they look forward to functions that make parking easier than ever before, such as “automatic parking in challenging spaces like mechanical parking lots” and “seamlessly connecting forward/reverse and steering for smoother parking completion than before.” Reasons included “I struggle with parking and sometimes can’t go where I want” and “It would be convenient in tight parking spots or unfamiliar driving areas.”



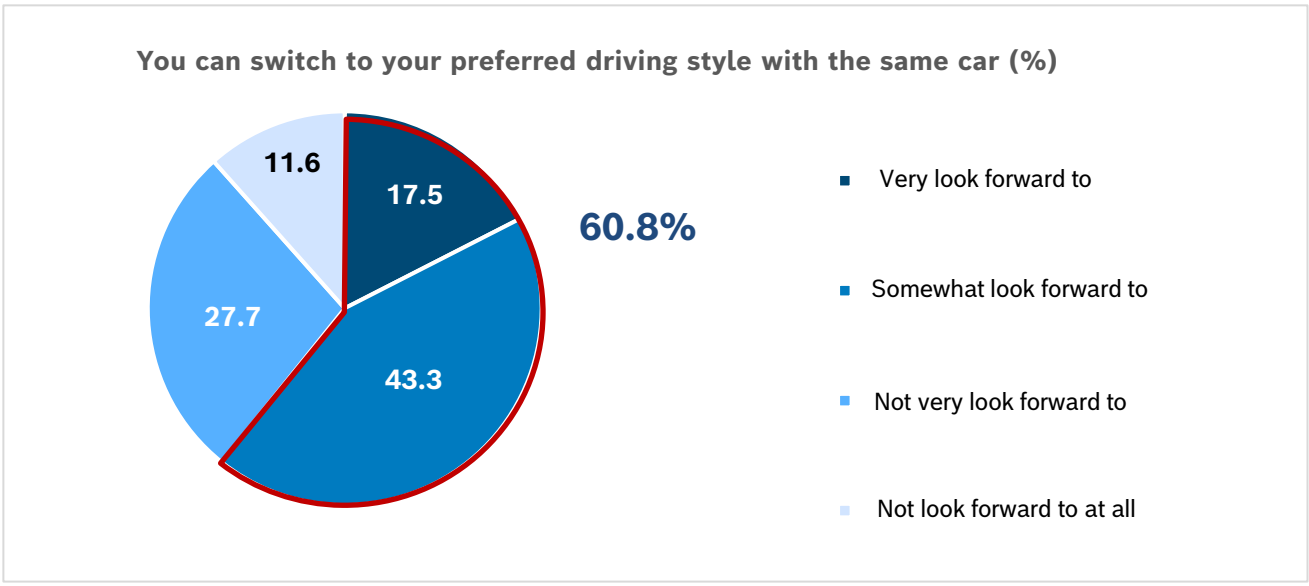
71.7% of respondents said they look forward to cars that are easier to drive than ever before, with features like “smooth braking without sudden jolts” and “software supports for steering more easily in tight spaces when making U-turns.” Reasons cited included “it takes time to park or turn around in tight spaces, and it’s important for safety.”



70.7% of respondents said they look forward to more interior space thanks to software control eliminating cables and resulting in fewer components inside the vehicle. Reasons cited for this anticipation included “it will enhance comfort when riding with family” and “it should reduce stress during long-distance travel.”



Furthermore, 60.8% of respondents said they look forward to vehicles that allow switching between preferred driving modes and environments in the same car. Examples include “Software enables personalization, so even in a shared family car, you can immediately customize the driving preferences to your liking.” Reasons to look forward to this function included “Changing the car settings to match your mood makes driving more enjoyable” and “When sharing a car with family, it’s convenient to have mode settings tailored to each person’s preferences.”



Japan Survey Summary

- Survey method: Internet survey
- Targets: 2,060 (men and women aged 18-69 nationwide)
- Survey period: September 18th-19th, 2025

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Bosch in Japan is currently represented in the country by Bosch Corporation, Bosch Rexroth Corporation and other affiliates. Bosch Corporation is responsible for the development, manufacturing, sales and services of automotive original equipment, automotive aftermarket products and power tools. Bosch Engineering K.K. provides engineering services, such as development and application for automotive systems. ETAS K.K. develops and provides engineering of development support tools of electrical control units. Bosch Rexroth Corporation develops and manufactures hydraulics, FA module components and other systems which contribute to industrial technologies. In 2024, Bosch Japan achieved sales to third parties of some 428 billion yen and employed approximately 6,300 associates.

Additional information is available online at
http://www.bosch.co.jp Bosch Japan Website (Japanese)
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The Bosch Group is a leading global supplier of technology and services. It employs roughly 418,000 associates worldwide (as of December 31, 2024). The company generated sales of 90.3 billion euros in 2024. Its operations are divided into four business sectors: Mobility, Industrial Technology, Consumer Goods, and Energy and Building Technology. With its business activities, the company aims to use technology to help shape universal trends such as automation, electrification, digitalization, connectivity, and an orientation to sustainability. In this context, Bosch's broad diversification across regions and industries strengthens its innovativeness and robustness. Bosch uses its proven expertise in sensor technology, software, and services to offer customers cross-domain solutions from a single source. It also applies its expertise in connectivity and artificial intelligence in order to develop and manufacture user-friendly, sustainable products. With technology that is "Invented for life," Bosch wants to help improve quality of life and conserve natural resources. The Bosch Group comprises Robert Bosch GmbH and its roughly 490 subsidiary and regional companies in over 60 countries. Including sales and service partners, Bosch's global manufacturing, engineering, and sales network covers nearly every country in the world. Bosch's innovative strength is key

to the company's further development. At 136 locations across the globe, Bosch employs some 87,000 associates in research and development.

The company was set up in Stuttgart in 1886 by Robert Bosch (1861–1942) as "Workshop for Precision Mechanics and Electrical Engineering." The special ownership structure of Robert Bosch GmbH guarantees the entrepreneurial freedom of the Bosch Group, making it possible for the company to plan over the long term and to undertake significant upfront investments in the safeguarding of its future. Ninety-four percent of the share capital of Robert Bosch GmbH is held by Robert Bosch Stiftung GmbH, a limited liability company with a charitable purpose. The remaining shares are held by Robert Bosch GmbH and by a company owned by the Bosch family. The majority of voting rights are held by Robert Bosch Industrietreuhand KG. It is entrusted with the task of safeguarding the company's long-term existence and in particular its financial independence – in line with the mission handed down in the will of the company's founder, Robert Bosch.

Additional information is available online at www.bosch.com, www.bosch-press.com.

Note: one Euro = 163.8354 JPY