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Mobility Minds Blog

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Navigating the Road Ahead

Recommendations for the Automotive Industry Based on the PwC Global 29th CEO Survey

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The automotive industry is entering its defining decade – and CEOs are navigating a dual mandate: deliver near-term performance while establishing the capabilities, cultures, and business models that will ensure both, mid-term relevance and long-term success. The latest **Global PwC CEO Survey** highlights both the urgency and the opportunity. Technology is accelerating, risk vectors are multiplying, and customer expectations continue to outpace many organizations' ability to adapt. However, revenue growth confidence in the automotive sector clearly trails other industries. Only 35% of automotive CEOs are very or extremely confident about revenue growth over the next three years, compared to 49% of CEOs across other sectors. This gap reflects growing skepticism amid ongoing challenges such as technological upheavals, regulatory requirements, supply chain disruptions, geopolitical challenges and shifting customer expectations.

Against that backdrop, five imperatives stand out for leaders aiming to build resilient, innovative, and trusted automotive companies.

1. Driving Innovation, Reinvention and Trust Through Partnerships

Diversification is becoming a strategic necessity as value shifts to mobility, software, data services, and related industries. The survey shows 70% of automotive companies are pursuing cross-industry collaboration to unlock growth and share risk, targeting sectors like industrial manufacturing, aerospace, logistics, and technology. Reinvention requires business model innovations such as subscription-based mobility platforms and data-driven customer experiences that extend value beyond vehicle sales. Partnerships with startups, tech firms, and research institutions accelerate innovation.

Trust, spanning digital trust, responsible AI, and transparent decision-making, is not a soft metric; it's a direct driver of enterprise value and license to operate. The survey points to uneven progress: only 40–51% of automotive companies have responsible AI management or clear roadmaps, which hinders scaling and elevates operational and regulatory risks. The sector shows less confidence in responsible AI governance compared with broader markets, signaling urgent need to strengthen AI oversight, bias mitigation, and auditability. Transparent communication about AI's role in decisions, especially in safety-critical contexts like vehicles and mobility services, is essential.

2. Enhancing Agility and Market Speed

Operational agility and faster speed to market, especially in e-mobility segments, can be improved through digitalization, predictive analytics, and tailored regional approaches, facilitated by a re-redesign of their corporate governance systems and structures. These capabilities are essential for automotive companies to remain competitive in rapidly evolving markets and to respond flexibly to customer needs and external shocks.

3. Investing in Talent and Leadership and Fulfilling New World Requirements

Navigating transformative AI-driven workforce shifts demands attracting skilled AI talent, upskilling current employees, and maintaining strong human leadership. This talent investment enables responsible management of workforce changes, such as the automation-driven decline in junior roles, and supports

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cultural adaptation critical to innovation and operational success.

4. Accelerating AI Adoption

AI has graduated from an efficiency level to a strategic enabler across the automotive value chain, from product development and manufacturing to customer engagement. According to the survey, 61% of automotive CEOs actively promote an AI adoption culture, yet 40% acknowledge governance gaps within AI-driven workforce shifts. Automation is causing a decline in junior roles, reported by up to 47% of CEOs, while mid-level management grows unevenly across regions (notably increasing 50% in Asia-Pacific but declining 44% in Europe).

Driving AI adoption requires comprehensive strategies that encompass responsible governance, culture, talent development, technology foundations, and investment. Importantly, 31% of companies are already increasing AI investments to fully leverage its benefits. Strong leadership and clear roadmaps connecting data platforms, talent, and measurable business outcomes are essential to scale AI from labs to frontline workflows successfully.

5. Strengthening Risk Management by Re-designing Corporate Governance

Trade tariffs are identified by 38% of CEOs as the biggest near-term industry threat, with macroeconomic volatility (36%) and geopolitical conflicts (34%) also top concerns. Automotive companies are to proactively manage these risks by diversifying supply chains, dual-sourcing critical components, regionalizing production, and enhancing supplier visibility deep into Tier-3 and Tier-4 suppliers. Scenario planning, early-warning analytics, and financial buffers are vital to adapt quickly to shocks.

Integrating climate considerations into capital allocation and M&A processes remains a challenge, with 54% of automotive CEOs reporting very limited actions. Embedding climate risk and opportunity into portfolio strategies, aligning decarbonization with product roadmaps and factory investments, and using scenario analysis for informed M&A can uncover cost advantages and regulatory alignment critical for long-term resilience.

The Road Ahead – A Pragmatic Playbook for the Defining Decade

The defining decade will reward leaders who embrace agility, reinvention, and responsible technology. By acting decisively on AI, trust, diversification, risk management, and long-term strategy, automotive organizations can build resilience, unlock new value, and shape the future of mobility with confidence – transforming today’s complexity into tomorrow’s competitive advantage.

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