

25th Annual *Global Automotive Executive Survey*

(Re)assert dominance:

**A leadership blueprint
for future success**

Executive summary

KPMG. Make the Difference.



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This report, “(Re)assert dominance: A leadership blueprint for future success,” marks the 25th edition of KPMG’s Global Automotive Executive Survey (GAES). It delves into the disruptive forces reshaping the automotive industry and introduces a framework for addressing these challenges — the **five Ts**:



Spearhead Transformation



Master Technology



Earn Trust



Navigate Tensions



Thrive Together

Designed to help stakeholders make bold and informed decisions, this study also provides actionable recommendations for navigating the industry’s complex future.



In a nutshell

The automotive industry is at a tipping point and not enough companies are ready. KPMG's 25th *Global Automotive Executive Survey* (GAES) reveals five imperatives that are already separating the leaders that will control the next decade.

Key findings of the 25th GAES

36% of automotive executives say that, **within the next three years**, their company's business model, products or operations will be **completely transformed**.

5X as many automotive leaders as other respondents say that customer satisfaction is critical to their company's long-term profitability.

77% of companies say **strategic alliances and partnerships** have either contributed or will be **important to business growth**.

86% of OEMs say they are **investing heavily in AI** and emerging technologies.

68% of companies are **actively restructuring their supply chains** (e.g. region-focused, local-for-local).

Five Ts that lead from disruption to dominance



Spearhead Transformation

Redefine what scale, speed and value mean for your business

Master Technology

Manage and control your digital strategy

Earn Trust

Build a real-time, insight-driven customer engine

Navigate Tensions

Design your regional resilience strategy

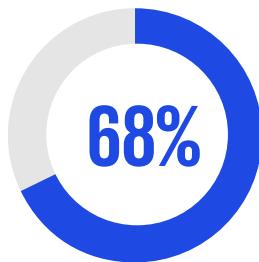
Thrive Together

Build your ecosystem before your competitors do

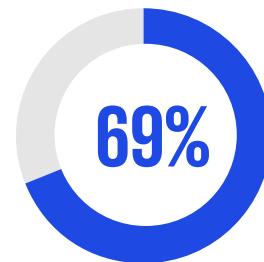
The automotive industry is in perpetual flux

Geopolitical upheavals, evolving regulatory landscapes, supply chain vulnerabilities, and rapidly advancing technologies are creating an unpredictable and fragmented automotive market. Moreover, with consumer preferences shifting toward electrification and digitalization, auto companies face mounting pressure to innovate at a speed and scale that challenges traditional ways of operating.

The report highlights the paradox executives face. While 68 percent of respondents believe new market entrants will displace traditional OEMs by 2030, 69 percent believe OEMs can regain dominance by reconfiguring their strategies. This underscores a critical industry-wide imperative: transformation is no longer optional, and companies must actively embrace disruption as a lever for reinvention.



of respondents
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OEMs by 2030



believe OEMs
can regain
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their strategies

The five Ts: Strategic blueprint for success

The report introduces the “five Ts” framework as a roadmap for companies to reshape their operations, business models, and customer interactions in the face of unprecedented industry challenges. Winning the next decade of mobility will not hinge on a single breakthrough — but on the ability to orchestrate transformation across multiple, interdependent domains.

A small group of companies in our survey — 15 percent of the respondents — are already doing this. These leading companies were identified through comparative analysis of performance metrics across innovation, customer satisfaction, and operational outcomes.

**Their success sends a powerful message:
transformation, done correctly, pays off.**

The five Ts: A new leadership agenda for automotive executives



Spearhead Transformation: Redefine what scale, speed and value mean for your business

- Cut to compete
- Redefine ROI metrics
- Accelerate with AI
- Prepare for consolidation
- Communicate the pivot



Master Technology: Manage and control your digital strategy

- Define digital control zones
- Strengthen governance for tech partnerships
- Build an agile operation model
- Invest in integrity and transparency
- Close the cultural gap



Earn Trust: Build a real-time, insight-driven customer engine

- Elevate customer insight as a strategic priority
- Map and enhance the digital journey
- Use data responsibility and transparency
- Link R&D to real preferences
- Consider lifetime value



Navigate Tensions: Design a regional resilience strategy

- Localize where it matters most
- Map exposure in real time
- Stay alert to regulatory risk
- Think sustainability by design
- Scenario-plan for the next shock



Thrive Together: Build your ecosystem before your competitors do

- Map partnership gaps
- Build an ecosystem strategy
- Rethink governance and culture
- Invest in relationship capital
- Collaborate on industry standards

From:
Volume maximization
To:
Value-focused efficiency

From:
Passive tech adoption
To:
Active digital ownership

From:
Assumptions about
customers
To:
Data-led intimacy and design

From:
One-size-fits-all supply
chains
To:
Localized, de-risked
operations

From:
Owning the full stack
To:
Orchestrating strategic
partnerships

How KPMG professionals support the transformation of the automotive industry

The automotive sector is undergoing a profound transformation — driven by digitalization, new mobility concepts, regulatory pressure and evolving customer expectations. KPMG professionals help companies navigate this change with a holistic approach that combines deep industry experience, strategic foresight and leading technology.

Digital sales and new retail: Rethinking the customer experience

Today, a large part of the car buying journey is digital — and nearly half of that happens on mobile devices. KPMG professionals support automotive companies in shaping this shift: from designing digital retail formats to integrating new touchpoints into physical dealerships. As many brands are not yet fully leveraging the potential of digital brand experiences, KPMG teams help close this gap with data-driven, customer-centric sales models that deliver seamless experiences both online and offline.

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Technology and digital transformation: Innovation as a growth engine

From AI-powered production to connected vehicles and digital platforms — KPMG specialists support the automotive industry in integrating emerging technologies. KPMG professionals help digitize manufacturing, enable data-driven decision-making and foster strategic partnerships with tech leaders. This helps ensure digital innovation and market leadership in a rapidly evolving environment.

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Strategy, deals and transactions: Driving targeted growth

Whether entering new markets, optimizing portfolios or enhancing performance, KPMG professionals offer wide-ranging support for strategic decisions and transactions. KPMG professionals guide buy- and sell-side processes, develop turnaround strategies and help recover commercial costs across supply and customer chains. We help create long-term value — beyond traditional M&A.

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Sustainability and compliance: ESG as a competitive advantage

Sustainability is no longer optional — it's essential. KPMG specialists help automotive companies develop ESG strategies and meet regulatory requirements efficiently. KPMG professionals identify relevant regulations, assess risks and design sustainable business models that are not only compliant but also resilient and value-generating.

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Global tax and trade: Navigating complexity with confidence

In an era of geopolitical shifts and rising trade barriers, tax and trade expertise is critical. KPMG specialists advise on optimizing global supply chains, leveraging R&D incentives and helping ensure cross-border compliance — enhancing transparency, efficiency and competitiveness.

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Captive finance: Reinventing automotive financial services

Automotive finance providers face a dual challenge: adapting to both the fast-paced automotive and financial sectors. KPMG professionals support captives in transforming their business models, optimizing regulatory processes and building new mobility and sales strategies. KPMG firms' six-pillar approach includes data analytics, governance frameworks and broad process automation — helping ensure efficiency and future-readiness.

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Conclusion

KPMG's 25th Global Automotive Executive Survey provides not just a diagnostic of the automotive industry's current challenges but a roadmap for its reinvention. By embracing the five T's, companies can evolve into resilient, adaptive market leaders capable of shaping the future of mobility.

The clear message is this:
Transformation is not optional, but those who embrace it strategically can turn disruption into dominance.



Methodology

About the research

This report is based on the 25th edition of KPMG's *Global Automotive Executive Survey* (GAES), a signature piece of research conducted annually to track strategic shifts in the global automotive industry. The 2025 edition focuses on how automotive leaders are responding to disruption and what differentiates high-performing organizations.

Research objectives

The research aimed to answer:

- How are automotive companies adapting to technological, geopolitical and regulatory disruption?
- What distinguishes the top-performing companies ('leading companies') from the rest?
- What strategies are most effective for navigating the next decade of transformation?

Research design

We employed a mixed-methods approach:



Quantitative survey of
775 senior automotive executives



Qualitative interviews with
7 global industry leaders

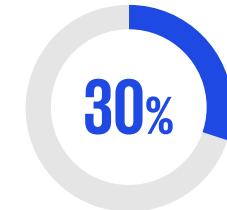


Desk research to contextualize
findings with external data

The survey was conducted online between **April and May 2025**.

Respondent profile

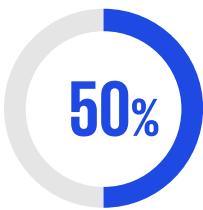
Roles



C-suite (CEO,
Chairperson,
President)



other C-level



senior executives
(VPs, department
heads)

Organization size: Ranged from mid-sized to large enterprises; turnover and employee count were not used as filters

Ownership: Mix of public and private companies

Sectors:

OEMs **30%** suppliers and dealerships **40%** mobility and financial services **30%**

Regions:

Americas
(190)

Europe
(340)

ASPAC
(245)

Qualitative interviews

We conducted in-depth interviews with senior leaders from companies including:

- **Paul Farrell**, Executive VP and Chief Strategy Officer, BorgWarner
- **Richard van der Meer**, Chief Information Officer, Nissan AMIEO
- **Guy Rodriguez**, President, Nissan LATAM
- **Don Romano**, President and CEO, Hyundai Motor Company, Australia
- **Thomas Schäfer**, Chief executive officer of the Volkswagen brand and a member of the Volkswagen Group Board of Management

These interviews were thematically coded and used to validate and enrich the Five Ts framework.

Analytical approach

Survey data was analyzed using **comparative and correlation-based methods**.

Leading companies were defined as the top

15% of respondents who:

1. Outperformed on innovation, customer satisfaction and operational targets.
2. And demonstrated advanced adoption of AI, supply chain localization and strategic partnerships.

No scoring index was used; segmentation was based on self-reported performance metrics.

Data handling and quality

- All responses were anonymized and aggregated
- Data was cleaned and validated for consistency
- No personally identifiable information was retained
- External data sources were cited and used under Creative Commons or with permission

Limitations

- Self-reported data may be subject to bias
- The survey reflects perceptions as of Q2 2025 and may not capture rapidly evolving market dynamics
- Regional and sectoral comparisons are directional, not statistically weighted

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