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The Global Auto AI readiness survey

The road to AI readiness: An action playbook for automotive companies

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Executive summary

Within the automotive industry, artificial intelligence (AI) is often moving from isolated pilots into the core of how vehicles are designed, built, and sold. To assess the industry's AI readiness, Deloitte Germany conducted a survey of 350 representatives of vehicle makers, suppliers, and technology vendors in automotive's four largest markets: China, Germany, Japan, and the United States. Their companies were then assessed using the Deloitte AI Readiness Index, with a score from zero to 100 derived from their responses across 6 readiness areas: strategy, people, data, technology, processes, and governance. Higher scores indicate greater readiness for AI adoption.

Key takeaways:

1. **Organizations fall into one of four readiness archetypes**
   Based on the survey, four readiness archetypes were identified into which organizations are categorized: leaders at the top (the most ready); visionaries and practitioners in the broad middle; and beginners (the least ready).

2. **Readiness is built through concrete action – and it pays off**
   Across the readiness spectrum, the share of companies reporting an EBIT (Earnings Before Interest and Taxes) uplift of more than 15% from AI rises from 24% among beginners to 65% among leaders, while the share with AI in production increases from 73% to 94%.

3. **China and the United States are comparable on AI readiness; Germany trails**
   The survey indicates that China and the United States have comparable levels of AI readiness, with average scores ranging from 76.0 to 77.7. Germany records a lower average readiness score of 70.7. Japan achieves the highest overall score, though its smaller sample size of 50 respondents versus 100 in the other markets should be considered.

4. **Four success factors help companies move from a beginner to a leader**
   Compared with beginners, leaders build talent on two fronts (reskill and hire), fund AI with more than 5% of revenue, assign clear organizational ownership for AI, and spread AI into most roles – and they do these things concurrently (see Table below).

5. **Barriers evolve as companies mature**
   Early challenges in AI readiness typically center on securing data and internal resources, while later-stage organizations are more likely to struggle with skills, organizational change, and regulatory requirements.

Success factors: what leaders do differently

Move	Success factors	Why they matter
Build talent on two fronts	69% of leaders both reskill and hire, compared with 3% of beginners.	Companies that both reskill existing employees and hire AI specialists report an EBIT uplift of more than 15% through AI more than twice as often as companies doing neither (60% versus 26%).
Fund with more than 5% of revenue	94% of leaders fund AI with more than 5% of revenue, compared with 48% of beginners.	Higher spending on AI is associated with higher reported EBIT uplift through AI.
Give AI a home	Leaders assign clear organizational ownership for AI. One-third operate a dedicated central AI team, compared with only 17% of beginners.	Without structure and an owner, AI is likely to stay in scattered pilots.
Spread AI into most roles	38% of leaders have AI in at least 70% of roles, compared with 3% of beginners.	Broad adoption of AI across roles shows the sharpest increase in reported EBIT uplift, particularly when combined with sufficient funding.
Know your barriers	The leaders' top barriers are skills, organization, and regulation. Data, which is the top barrier for beginners, is less of an issue.	As companies mature, hurdles move from data and budget to people and rules. Companies should plan for the shift as they evolve.



The Deloitte AI Readiness Index and the AI readiness landscape

The Deloitte AI Readiness Index

To compare the readiness of companies, the study builds one number, or score, based on the Deloitte AI Readiness Index.

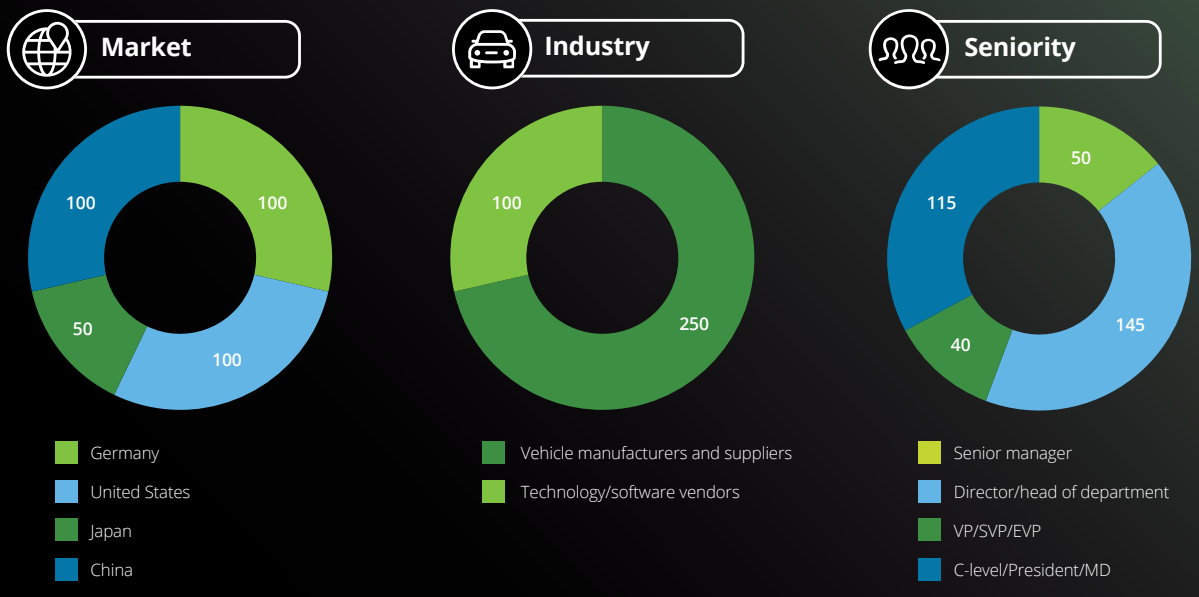
What it is: a single 0–100 score for how ready a company is to use AI. A score of around 0 equals not ready, around 50 equals somewhat ready, and around 100 equals highly ready. Across the 350 respondents, the average score is about 75.

What it is built from: six areas, each with two dimensions. Each respondent indicated the extent to which they agreed with statements across six areas of readiness: strategy, people, data, technology, process, and governance. Within each area, the questions were divided into a strategic half (ambition, leadership alignment, prioritized plans, governance frameworks, that is, do we have a clear direction?) and an operational half (everyday enablement, daily use, embedding AI into the work, that is, are we actually doing it?). Each area's score is the average of its two halves, with the overall index the average of the six areas.

Survey methodology

Between 21 May and 18 June 2026, Deloitte Germany surveyed 350 respondents across four major automotive markets: China (100 respondents), Germany (100), Japan (50), and the United States (100). Due to the smaller sample size, results for Japan should be interpreted with some caution. The smaller sample reflects the lower availability of eligible senior decision-makers in Japan within the defined fieldwork period and under a consistent recruitment approach.

The survey spans vehicle manufacturing companies (OEMs), their tier 1-3 suppliers, and the technology and software vendors that provide solutions to them. The survey captures input across functions from R&D and production to sales and strategy and from different organizational roles, with the majority of responses coming from senior decision-makers, ensuring findings reflect strategic and operational leadership perspectives.



Note: Market = the survey market of the respondent's company. Seniority = the respondent's role as recorded in the survey sample.

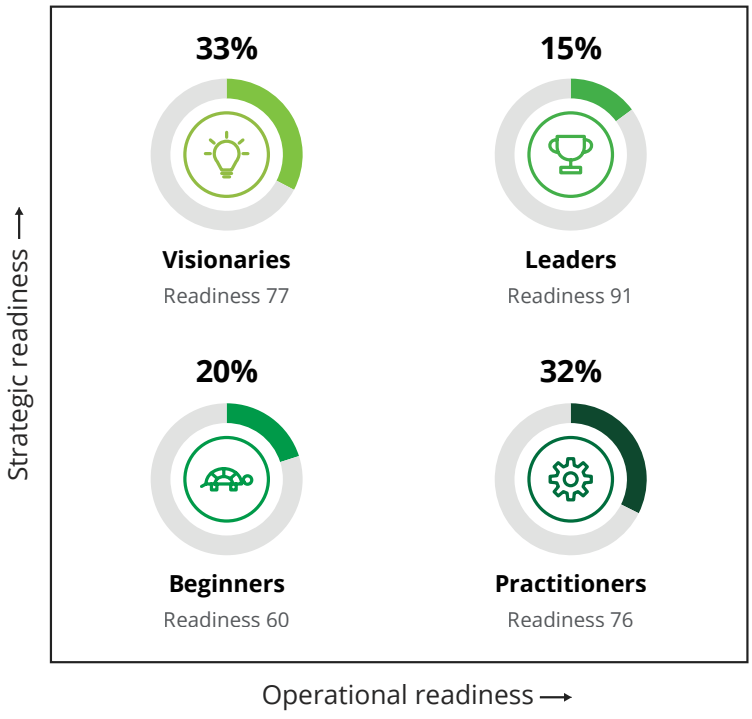
The four readiness archetypes

By assessing a company's readiness across two dimensions – strategic and operational readiness – the survey reveals four readiness archetypes:

- **Leaders:** These are the most AI-ready companies, strong on both strategy and operations with a clear AI direction matched by AI that is genuinely embedded in everyday work. They average a readiness score of 91 out of 100 and report a meaningful EBIT uplift more often than any other group.
- **Visionaries:** The ambitious contingent within the broad middle, these companies' strategy, leadership alignment, and plans run ahead of what they have put into practice. That is, they are strong on paper but are still closing the gap on the ground, with an average readiness score of 77.
- **Practitioners:** Also part of the broad middle, these companies are further along in their day-to-day use of AI than their formal strategy would suggest, with a more hands-on approach than visionaries. But with an average readiness score of 76, they sit at a similar level as visionaries (77).
- **Beginners:** These companies lag on both strategy and operations, with limited strategic direction and little AI embedded into day-to-day operations. While their average readiness score of 60 may suggest that an AI foundation is already in place, they are realizing the fewest benefits from AI adoption (section 3 gives practical guidance on how organizations can move beyond this stage).

Organizations fall into four readiness archetypes: 15% are leaders, strong on both planning and doing, while 20% are beginners, still developing in both.

Readiness archetypes by strategic and operational readiness (% of companies)



Note: Archetypes: leaders = top 15% and beginners = bottom 20% of companies by AI Readiness Index (0–100); the middle is split by whether strategic (planning) or operational (doing) readiness is higher. Ring = share of all respondents; readiness = the archetype's average AI Readiness Index score.

Q17–32. 16 statements on AI strategy, people, data, technology, process and governance, rated on a 1–7 agreement scale (the basis of the AI Readiness Index).

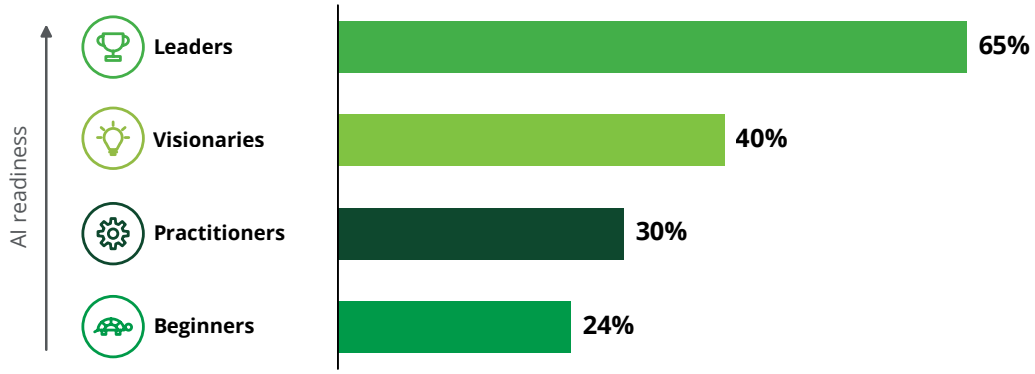
Sample size: n= 52 [Leaders]; 114 [Visionaries]; 113 [Practitioners]; 70 [Beginners]

The more ready the company, the higher the EBIT

As the figure below shows, being AI ready pays off, with the share of companies reporting a significant EBIT uplift from AI rising steadily with readiness. Almost two-thirds of leaders (65%) report an EBIT uplift above 15% – nearly three times the rate of beginners (24%).

The readier the organization, the higher the reported payoff: 65% of leaders report an AI-driven EBIT uplift above 15%, against 24% of beginners.

Organizations reporting an AI-driven EBIT uplift above 15%, by readiness archetype (% of companies)



Note: EBIT uplift above 15% = answers 16–20%, 21–25% or >25%; 'unable to say' excluded. Archetypes: leaders = top 15% and beginners = bottom 20% of companies by AI Readiness Index (0–100); the middle is split by whether strategic (planning) or operational (doing) readiness is higher.

Q11. What percentage increase in EBIT was achieved through AI in the last financial year? (through AI implementation, but also sales of AI-related products and services)

Sample size: n= 52 [Leaders]; 112 [Visionaries]; 111 [Practitioners]; 66 [Beginners]

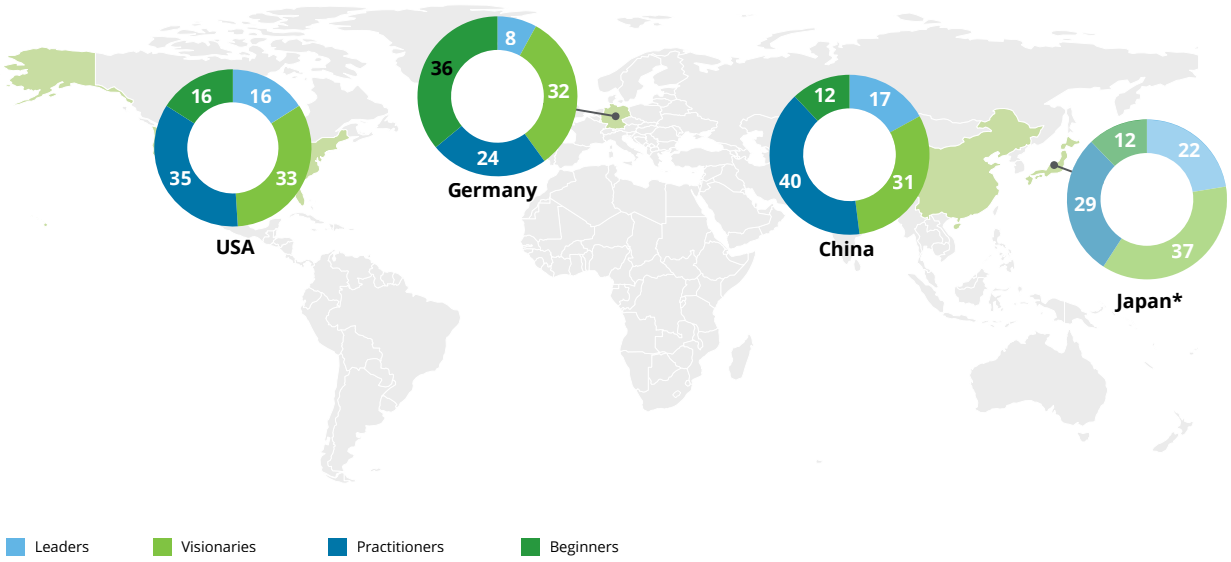


The readiness landscape: who leads and how markets differ

Readiness is spread unevenly across the four markets included in this report. China and the United States demonstrate the highest levels of AI readiness, with similarly large shares of AI leaders. Based on the survey responses, Germany has the smallest share of leaders and the largest share of beginners. Japan has the highest share of leaders comparing all four markets.

China has the largest share of leaders (17%) (excluding Japan); Germany, based on the survey responses, has the fewest leaders (8%).

Readiness archetype mix by market (% of companies)



Note: Percentages may not add up to 100 due to rounding. Archetypes: leaders = top 15% and beginners = bottom 20% of companies by AI Readiness Index (0–100); the middle is split by whether strategic (planning) or operational (doing) readiness is higher.
* Results for Japan should be treated with some caution, as the sample size is smaller than in the other three markets.

Q17–32. 16 statements on AI strategy, people, data, technology, process and governance, rated on a 1–7 agreement scale (the basis of the AI Readiness Index).

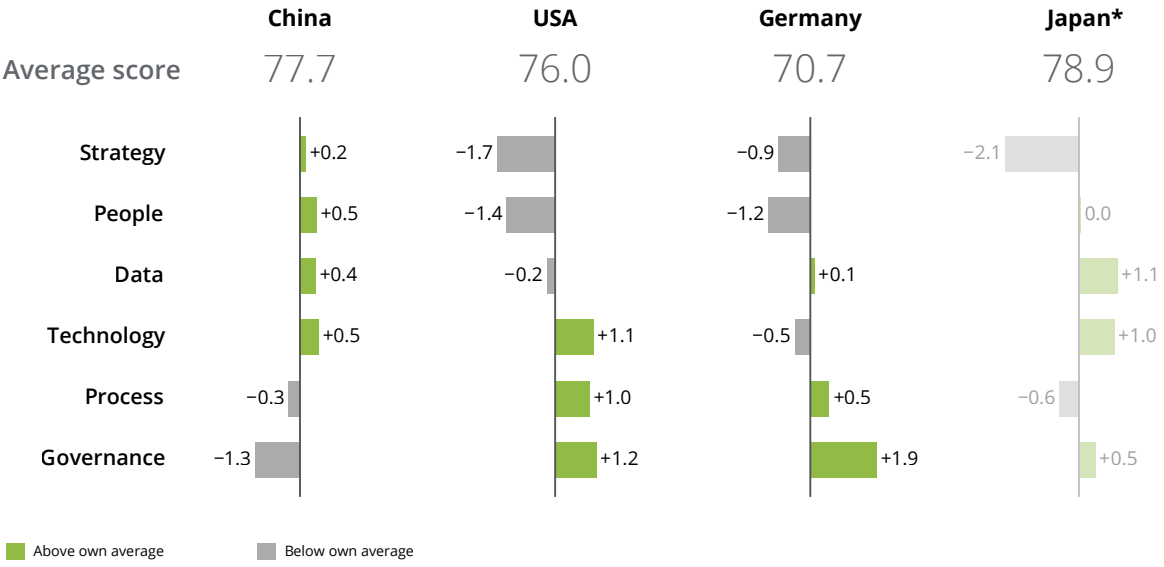
Sample size: n= 100 [Germany]; 100 [USA]; 100 [China]; 49 [Japan; excluding one respondent due to incomplete strategic governance responses]

China stands out for how broadly it trains its workforce: 65% of Chinese respondents agree or strongly agree that employees receive regular, role-relevant training that enables effective use of AI in day-to-day work, compared with 56% in the United States and 35% in Germany.

The figure below assesses each country's performance across six areas: strategy, people, data, technology, process, and governance. Comparing China, Germany, and the United States, China scores highest in all categories except for governance, which is led by the United States. In general, the survey indicates a pattern: Western markets lean toward the controls side of AI, while Asian markets lean toward the build side. Within Germany, governance receives the highest score, outperforming its average score across all six areas by 1.9 points. The United States scores highest in governance, process, and technology, compared with the other three areas. China scores highest in technology and people, while governance is its weakest area. Japan, meanwhile, performs strongest in data and technology.

China is relatively strongest in people and technology; Germany has the lowest average score and leans on governance.

Readiness by market: average AI Readiness Index (0-100) and each area's gap to it (points)



Note: bars = area score minus that average, so each market's six bars add up to zero.
Example: USA Technology 77.1 – 76.0 = +1.1.
* Results for Japan should be treated with some caution, as the sample size is smaller than in the other three markets.

Q17–32. 16 statements on AI strategy, people, data, technology, process and governance, rated on a 1–7 agreement scale (the basis of the AI Readiness Index).

Sample size: n= 50 [Japan; one respondent's governance score is based solely on operational responses due to missing strategic governance responses]; 100 [China]; 100 [USA]; 100 [Germany]



Success factors: How to become a leader

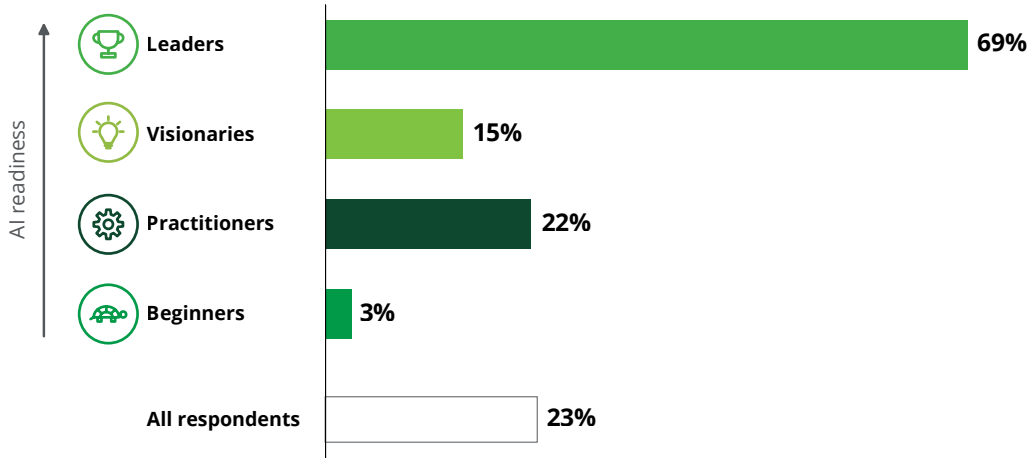
Based on the survey results, there are five actions a company can take to help raise its readiness score and start progressing toward leader status.

Build the workforce on two fronts: reskill and hire

The most AI-ready companies often build their AI workforce two ways at once: retraining the people they have and hiring new specialists. Doing both can help a company gain leader status. The survey results show that these two levers complement one another – and that retraining or hiring alone can only partially lift readiness. Companies that emphasize both retraining and hiring report a more than 15% EBIT uplift more than twice as often as those doing neither (60% compared with 26%).

Most leaders build AI talent on both fronts: 69% both reskill and hire, against 3% of beginners and 23% of all respondents.

Organizations that both reskill staff and hire for AI, by readiness archetype (% of companies)



Note: Both = above the median on reskilling (employees need to be retrained) and on hiring (expanding the workforce). Archetypes: leaders = top 15% and beginners = bottom 20% of companies by AI Readiness Index (0–100); the middle is split by whether strategic (planning) or operational (doing) readiness is higher.

Q15. What impact does the use of AI have on your workforce overall?

Sample size: n= 52 [Leaders]; 114 [Visionaries]; 113 [Practitioners]; 70 [Beginners]

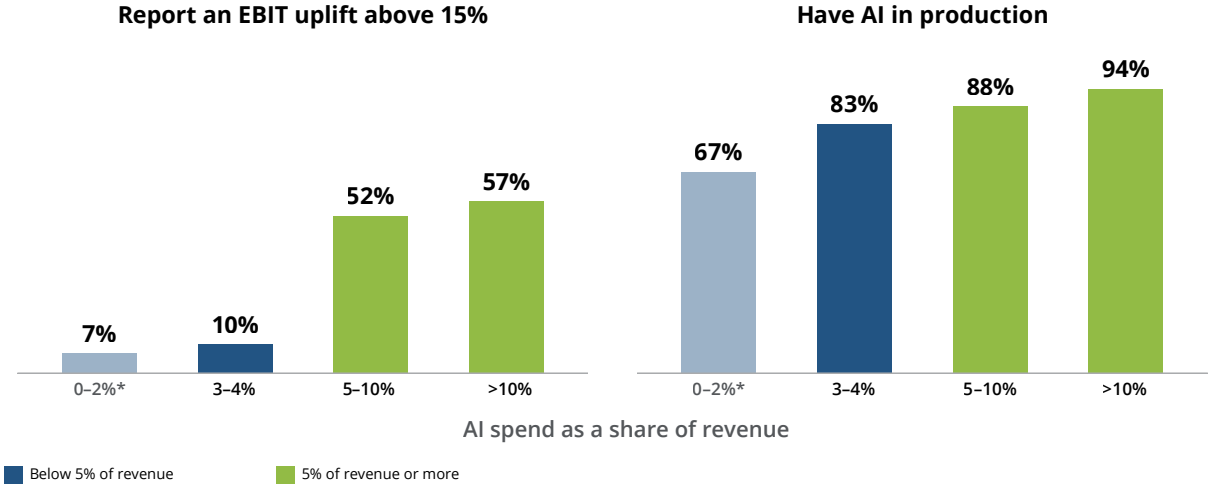
The encouraging part is that the need for retraining existing staff is already acknowledged within the industry, as in the companies surveyed identify it as the single most widely expected workforce impact of AI. So, for many companies, the missing move could be the deliberate hiring to go with the retraining.

Spend enough to make an impact

The figure below shows that EBIT impact rises sharply among organizations spending more than 5% of revenue on AI. As such, funding appears as one of the strongest links to readiness, and it is among the bigger spenders that the link appears the strongest.

More than half of companies spending 5% or more of their revenue on AI report an EBIT uplift above 15%; AI in production rises only gradually.

EBIT uplift above 15% and AI in production, by AI spend (% of companies)



Note: AI spend = expected AI investment in the current financial year as a share of revenue; 'unable to say' excluded. EBIT uplift above 15% = answers 16–20%, 21–25% or >25%; 'unable to say' excluded. AI in production = answered 'yes'; 'unsure' counts as not in production. * Fewer than 30 companies – read with care.

Q18. What is your expected investment for AI in the current financial year measured as a share of revenues?

Q11. What percentage increase in EBIT was achieved through AI in the last financial year? (through AI implementation, but also sales of AI-related products and services)

Q28. Do you currently have at least one AI solution in production (beyond PoC/MVP)?

Sample size: n= 15 [0–2%]; 104 [3–4%]; 169 [5–10%]; 51 [>10%] (EBIT uplift); 15; 109; 171; 51 (AI in production)

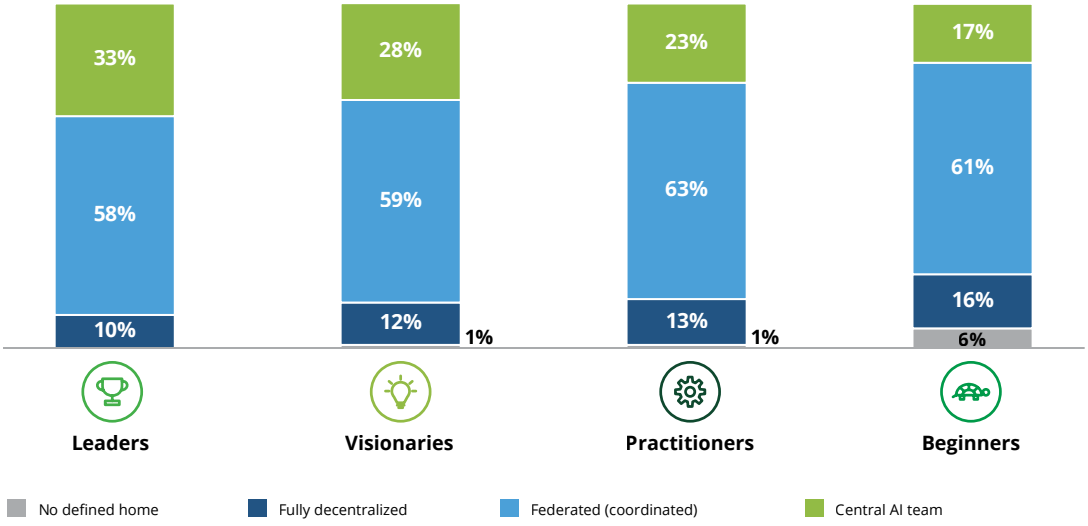
Interestingly, most companies that spend less than 5% of revenue on AI also have at least one AI solution in production. Higher investment, therefore, matters less for initial deployment than for scaling. These higher investments fund the data, computing capacity, and talent required to move beyond pilots and generate measurable value. In fact, according to the survey results, 94% of leaders invest at least 5% of revenue in AI, compared with 48% of beginners, further supporting the association with readiness.

Give AI a home: the most ready companies provide structure

The survey results indicate that companies that give AI a defined home are markedly more AI ready than those where nobody owns it. The single biggest step is simply introducing some kind of structure, with the most AI-ready organizations leaning toward a dedicated central AI team (see figure below).

Every leader has a defined home for AI and 33% run a central AI team; only beginners show a meaningful share (6%) with no defined structure.

How AI is organised, by readiness archetype (% of companies)



Note: Percentages may not add up to 100 due to rounding. Archetypes: leaders = top 15% and beginners = bottom 20% of companies by AI Readiness Index (0–100); the middle is split by whether strategic (planning) or operational (doing) readiness is higher.

Q16. How is AI organized in your company?

Sample size: n= 52 [Leaders]; 114 [Visionaries]; 113 [Practitioners]; 70 [Beginners]

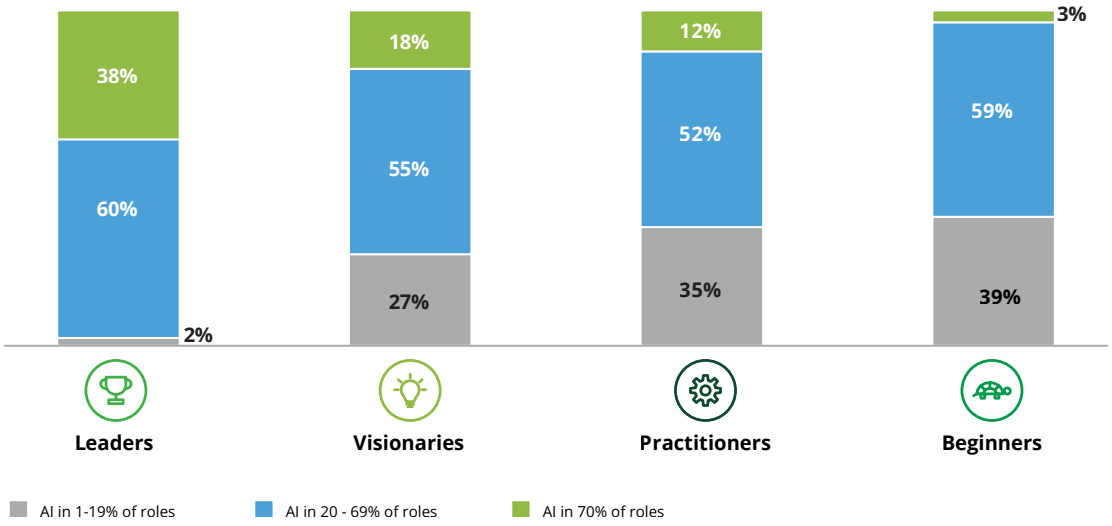
The survey observation is less about the shape of the set-up than about having one at all. The most significant jump in readiness comes from establishing a defined organizational home for AI. Once AI has a clear owner, the differences between a coordinated and a fully central team are comparatively small. And this is more than a readiness score: the handful of companies with no structure at all rarely get AI live in production–about one in six, against the large majority everywhere else. The practical read for a beginner is to give AI a home first and refine its shape later.

Spread AI adoption across the company

How widely AI reaches into everyday work is also one of the strongest links to readiness, according to the survey results. The most AI-ready companies are the ones that spread adoption the furthest. In contrast, where AI touches only a handful of roles, readiness is lower.

Leaders spread AI widely: 38% use it in at least 70% of roles, while 39% of beginners reach just 1–19% of roles and only 3% get to 70%.

Share of job roles supported by AI, by readiness archetype (% of companies).



Note: Percentages may not add up to 100 due to rounding. 70% or more combines the answers 70-90% and >90%. Archetypes: leaders = top 15% and beginners = bottom 20% of companies by AI Readiness Index (0–100); the middle is split by whether strategic (planning) or operational (doing) readiness is higher.

Q20. Please estimate the percentage of roles in your organisation that are supported by AI and already demonstrate benefits

Sample size: n= 52 [Leaders]; 114 [Visionaries]; 113 [Practitioners]; 70 [Beginners]

This indicates that AI has stopped being a specialist tool and has become an everyday operating capability – a trait of the most AI-ready companies. According to the survey results, almost two in five leaders (38%) have AI supporting most of their roles (70% or more), with nearly none among beginners (3%). When considering the effect on EBIT uplift, the importance of spreading AI becomes even clearer: it is the factor that leads to the sharpest uplift across all factors in the survey.

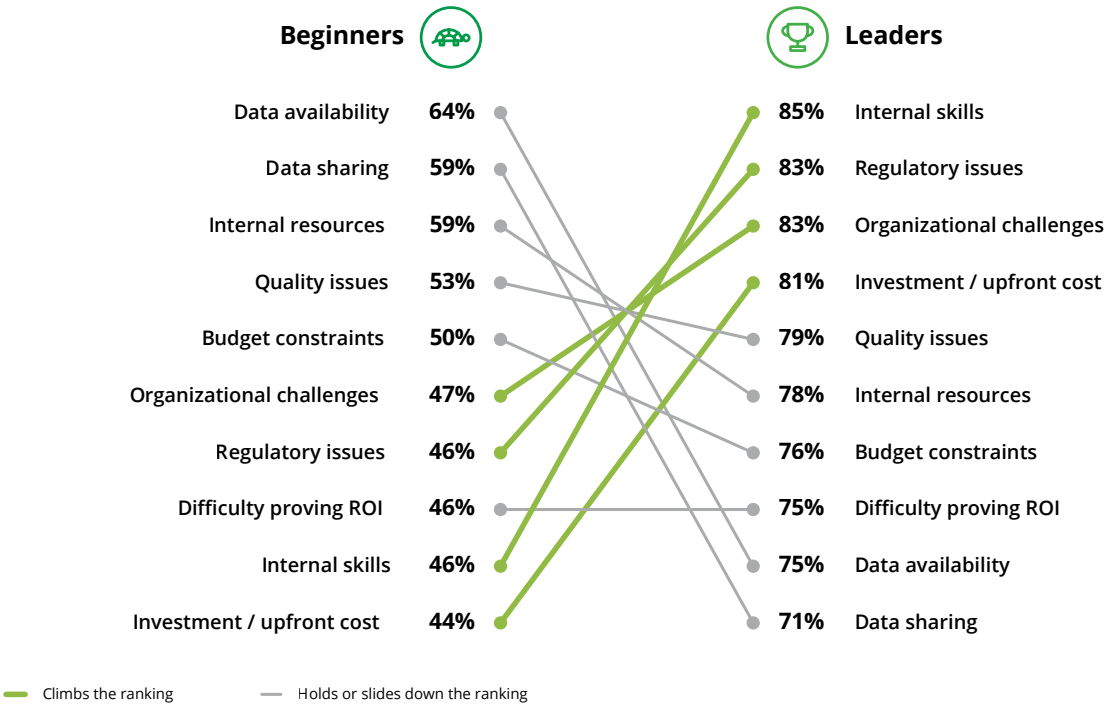
Additionally, funding and spreading reinforce each other. A company rarely spreads AI widely without first funding it; thus, the largest gains come from implementing the two in tandem.

Know your barriers – they shift as you mature

The survey results indicate that the more ready a company becomes, the more barriers it reports. While this might seem counterintuitive at first, it reflects how more advanced AI adoption exposes a broader and more complex set of challenges. This is illustrated by the figure below, which shows that barriers shift considerably as companies mature.

As readiness grows, the top barriers change: beginners are held back most by data, leaders by skills, organization and regulation.

Barriers rated a real challenge, beginners vs. leaders (% of companies, ranked within each group)

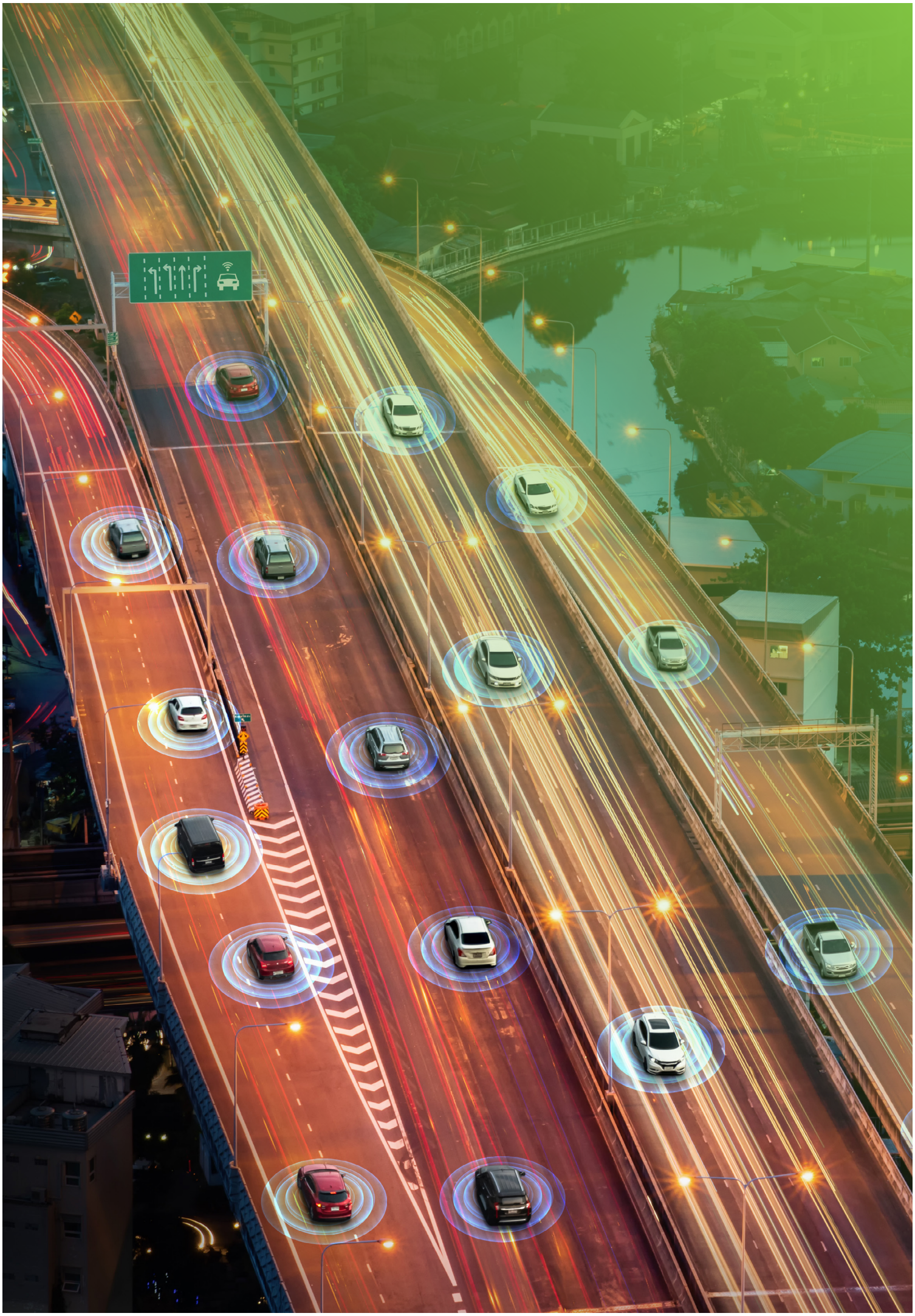


Note: Real challenge = rated 5–7 on a 1–7 agreement scale; 'don't know' excluded. Barriers with the same share are ranked by their average rating. Archetypes: leaders = top 15% and beginners = bottom 20% of companies by AI Readiness Index (0–100); the middle is split by whether strategic (planning) or operational (doing) readiness is higher.

Q13. What are the main barriers preventing AI initiatives from moving beyond Proof of Concept (PoC) / Minimum Viable Product (MVP)?

Sample size: n= 69–70 [Beginners]; 51–52 [Leaders]

The chart ranks each barrier within a group, highlighting the changing order of concerns versus barriers being eliminated. Data problems do not disappear with readiness; if anything, the most AI-ready companies report an increase in these problems: leaders flag data availability 75% of the time against beginners at 64%. What changes is dominance: for beginners, the top barriers are foundational, that is, getting the data and internal resources in place. For leaders, those factors move down in rank, not because they are solved, but because AI concerns around people, organization, skills, regulation, and reorganizing climb even higher. For a leader-in-waiting organization, that could mean lining up change-management and talent work early on – as the hurdle felt most today is likely not the one felt most tomorrow.



Industry-wide developments

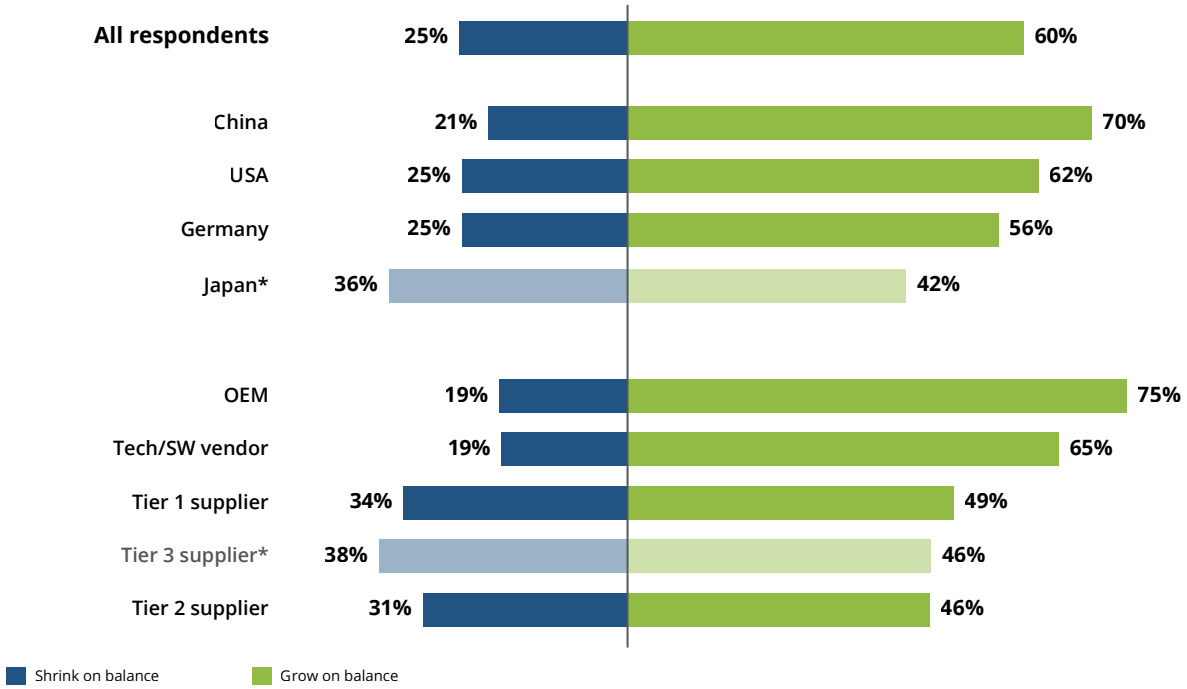
Beyond the levers a company can pull to move from beginner to leader, three industry-wide patterns emerge from the survey results.

Workforce transformation, not workforce reduction

Across each market and company type, organizations expect AI to grow their workforce more often than shrink it. According to the survey, concerns about job reductions highlighted in the media do not match what the industry reports: weighing each company's expected expansion against its expected cuts, net growers outnumber net shrinkers by more than two to one overall (60% versus 25%).

AI is expected to add jobs more often than cut them: 60% of companies expect net growth, 25% a net decline, and growers lead in every market and company type.

Expected net effect of AI on the workforce, by market and company type (% of companies)



Note: Grow (shrink) on balance = agreement with the two workforce-expansion statements is higher (lower) than with the two reduction statements; the remaining companies are balanced. * Results for Japan should be treated with some caution, as the sample size is smaller than in the other three markets. Tier 3 Supplier: fewer than 30 companies - read with care.

Q15. What impact does the use of AI have on your workforce overall?

Sample size: n= 100 [China]; 100 [USA]; 100 [Germany]; 50 [Japan]; 93 [OEM]; 100 [Tech/SW vendor]; 65 [Tier 1 supplier]; 24 [Tier 3 supplier]; 68 [Tier 2 supplier]

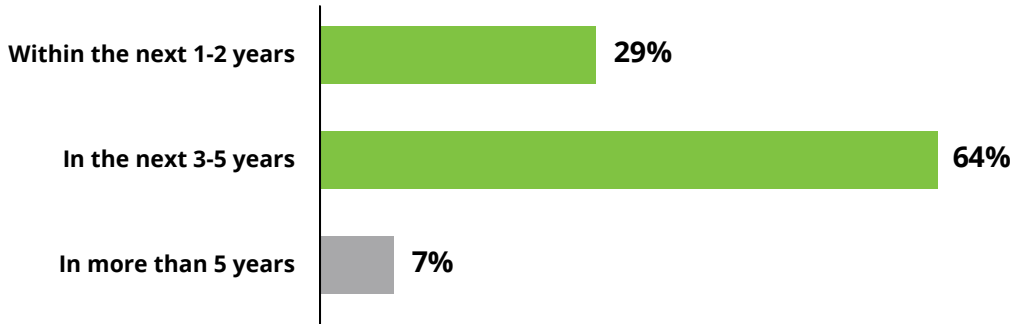
When asked in their own words which roles AI will likely grow, survey respondents were mostly consistent: the jobs expected to grow are primarily technical, particularly in AI and engineering, building the tools and architecture to leverage AI in day-to-day work.

Where AI creates value

Respondents overwhelmingly expect AI to accelerate progress in highly complex domains, with more than 90% believing that AI may help enable decisive advances in autonomous driving over the next one to five years.

93% of companies expect AI to enable decisive progress in large, complex projects such as autonomous driving within the next five years

Expected timing of decisive AI progress in large, complex projects (% of companies)



Note: 'Unable to say' <1%.

Q14. When do you expect AI to enable decisive progress with respect to large and complex projects such as autonomous driving?

Sample size: n= 350

Beyond autonomous driving, companies also expect to see disruptive use cases across the automotive value chain. Asked to describe disruptive fields in their own words, respondents frequently highlighted customer interaction, product development, automotive design, and predictive maintenance. And in innovative fields such as mobility-as-a-service (MaaS), software-defined vehicles (SDVs), and knowledge-as-a-service, about one quarter believe AI will create fundamentally new business models. This suggests that, for many organizations, the most immediate value of AI lies in transforming existing operations rather than reinventing services.

Closing the AI investment gap

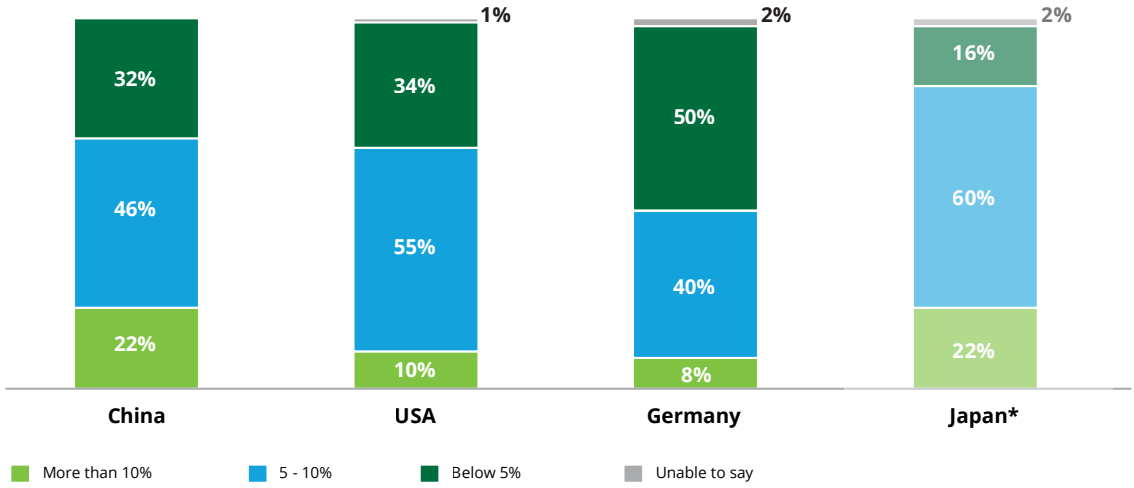
AI may promise substantial benefits, including greater operational efficiency, improved products, accelerated innovation, and new sources of competitive differentiation. But realizing these benefits could require more than deploying AI tools.

In fact, organizations may need to invest in specialized talent, scalable data infrastructure, modern technology platforms, governance frameworks, cybersecurity capabilities, and new operating models. Capturing value from AI may likely require sustained commitment and significant financial resources.

Yet the survey reveals notable differences in investment intensity across countries. German automotive companies appear considerably more cautious in their AI spending than their international peers. Half of German respondents report allocating less than 5% of revenue to AI-related investments, compared with 32% to 34% of respondents in the United States and China.

German companies invest most cautiously: 50% expect to spend less than 5% of revenue on AI, against 16-34% in Japan, China and the USA.

Expected AI investment as a share of revenue, by market (% of companies)



Note: Percentages may not add up to 100 due to rounding. Below 5% combines the answers 0-2% and 3-4%.
* Results for Japan should be treated with some caution, as the sample size is smaller than in the other three markets.

Q18. What is your expected investment for AI in the current financial year measured as a share of revenues?

Sample size: n= 50 [Japan]; 100 [China]; 100 [USA]; 100 [Germany]

These differences may have important implications for future competitiveness. Underinvestment could risk slowing the development of critical capabilities, reducing innovation capacity, and widening performance gaps relative to competitors.



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