



Industry study 2025:
Driving diversity and inclusion for
women in the automotive industry



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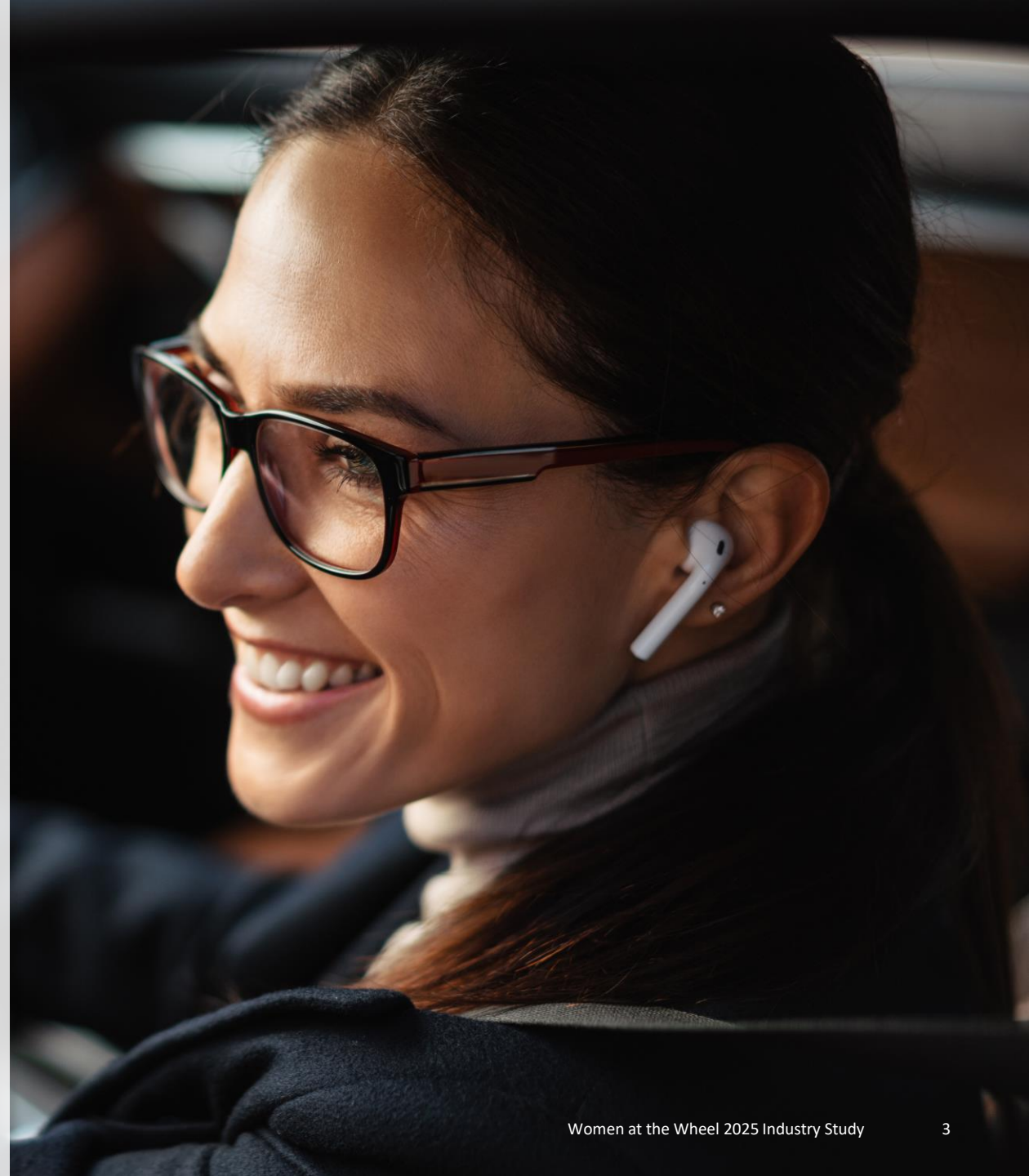
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The path forward requires a collective recommitment to action from all levels of the organisation.



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FOREWORD

The automotive industry stands at a pivotal moment. As the sector navigates a period of unprecedented transformation, driven by technological advancements, economic shifts and evolving societal expectations, the need for a diverse and inclusive workforce has never been greater.

This report, based on a global survey of diverse automotive professionals, from multiple geographies covering Europe, Asia Pacific and others provides a timely and critical examination of the current state of gender diversity and inclusion within the industry. Our findings reveal a mixed picture: **while there is a growing awareness of the importance of diversity and inclusion, progress in achieving true gender parity has recently stagnated. Women remain underrepresented in leadership roles and many face persistent barriers to advancement.**

This report delves into the key challenges and opportunities facing women in automotive industry, exploring the impact of flexible work policies, the importance of authentic leadership and the need for systemic change to create a truly inclusive workplace. It also reveals that the gender challenge exists across all countries – with significantly more similarities across country responses than differences.

However, amid these challenges, a strong undercurrent of optimism emerges. Respondents express excitement about the positive opportunities that lie ahead, particularly in areas like sustainable mobility solutions and the integration of cutting-edge technologies. **They recognise that a more diverse and inclusive industry is not just a matter of social justice, but a business imperative essential for driving innovation and remaining competitive in the rapidly evolving automotive landscape.**

Finally, the report hopes to offer recommendations for automotive companies to move beyond superficial initiatives and embrace a comprehensive, systemic approach to diversity and inclusion. In these times, it's more important than ever to consider fostering authentic leadership and addressing unconscious bias to promoting flexible work arrangements and championing allyship, the path forward requires a collective commitment to action from all levels of the organisation.

I recently heard someone say “great minds, DON’T think alike” – so let’s embrace the huge diversity of minds which fed into this report and the resulting insights and recommendations presented. We truly believe the automotive industry can continue to unlock the full potential of its workforce, drive innovation, and create a more sustainable, equitable, and prosperous future for all.

**SARAH NOBLE****Partner, Deloitte***Founder of Women at the Wheel*

DIVERSITY AND INCLUSION – THE CURRENT STATE

The automotive industry has been undergoing a significant transformation since the COVID-19 pandemic began in 2019. This period of disruption presents a crucial opportunity to address gender diversity in the sector. Our research reveals that, while progress towards equitable female representation has unfortunately plateaued in recent years following the pandemic, there is a growing recognition of the need for change and a strong desire to accelerate progress. This awareness of the importance of diversity and inclusion (D&I) is increasingly apparent across the global automotive community, though some regions are showing more advancement than others.

This report provides a deep dive into impactful initiatives designed to support women in advancing their careers within the automotive industry, ultimately contributing to enhanced gender diversity and inclusion. While it is crucial to acknowledge that some past D&I initiatives have unfortunately prioritised surface-level appearances over genuine, systemic change – there's a growing movement towards more impactful and sustainable approaches. Companies across the automotive sector are beginning to recognise that true progress requires a deeper commitment to addressing the root causes of inequality. This signifies a shift away from superficial measures towards enacting meaningful, lasting change within the industry.

While levels of progress and achievement towards gender diversity vary across countries, the automotive industry as a whole continues to face challenges. **A consistent lack of female role models in leadership, persistent unconscious bias, inflexible working policies failing to accommodate different personal commitments, and a lack of accountability for diversity targets contribute to a sense of stagnation. Addressing these systemic issues is essential to achieving meaningful and lasting change.**

Figure 1. Changes in attitudes towards women in the last 2 years

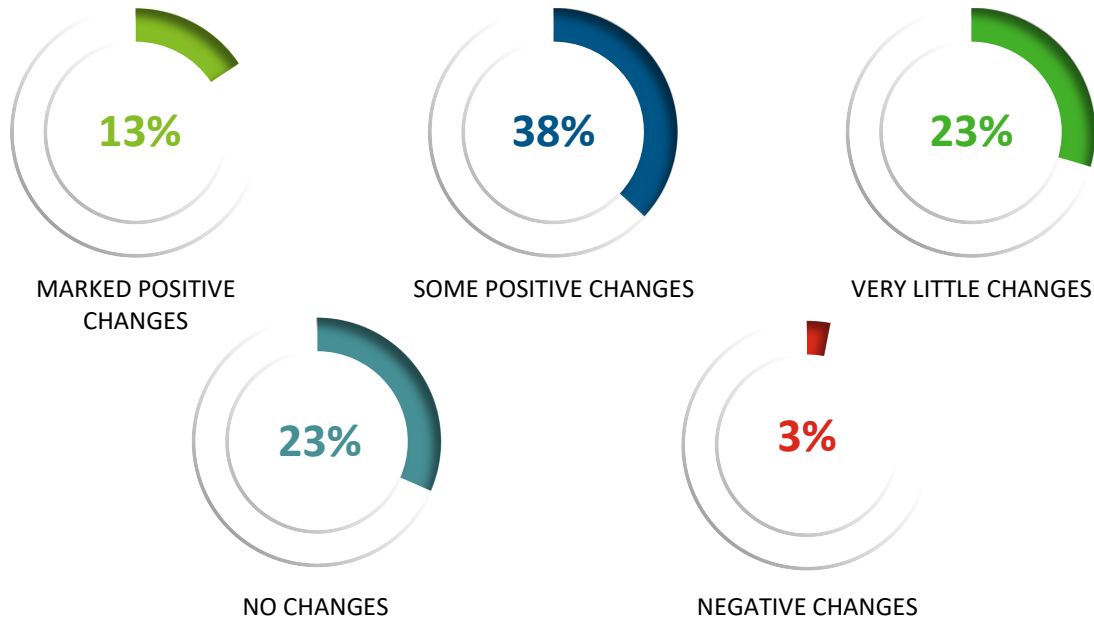


Figure 2. Representation of women in leadership as perceived by survey respondents



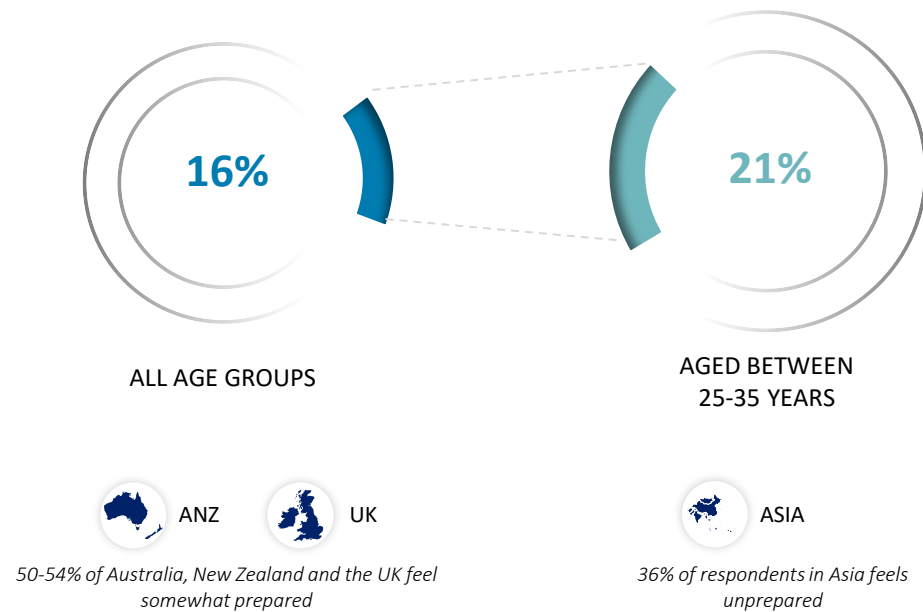
Australia is ahead of other geographies where more respondents stated that women are sufficiently represented in leadership positions

DIVERSITY AND INCLUSION – INDUSTRY CHALLENGES

On top of the diversity challenges, there is a prevailing sentiment from more than 70% of respondents that the automotive industry is on the brink of a significant transformation. While respondents demonstrate an awareness of these shifts, there is a notable lack of consensus on the level of preparedness to navigate them effectively.

Our analysis highlights a concerning **sentiment among executives and mid-level managers, particularly those in the critical 25-35 age group, who expressed feelings of unpreparedness in the face of upcoming industry challenges.**

Figure 3. Percentage of respondents feeling somewhat unprepared for the industry changes



Note: ANZ – Australia and New Zealand, UK – United Kingdom

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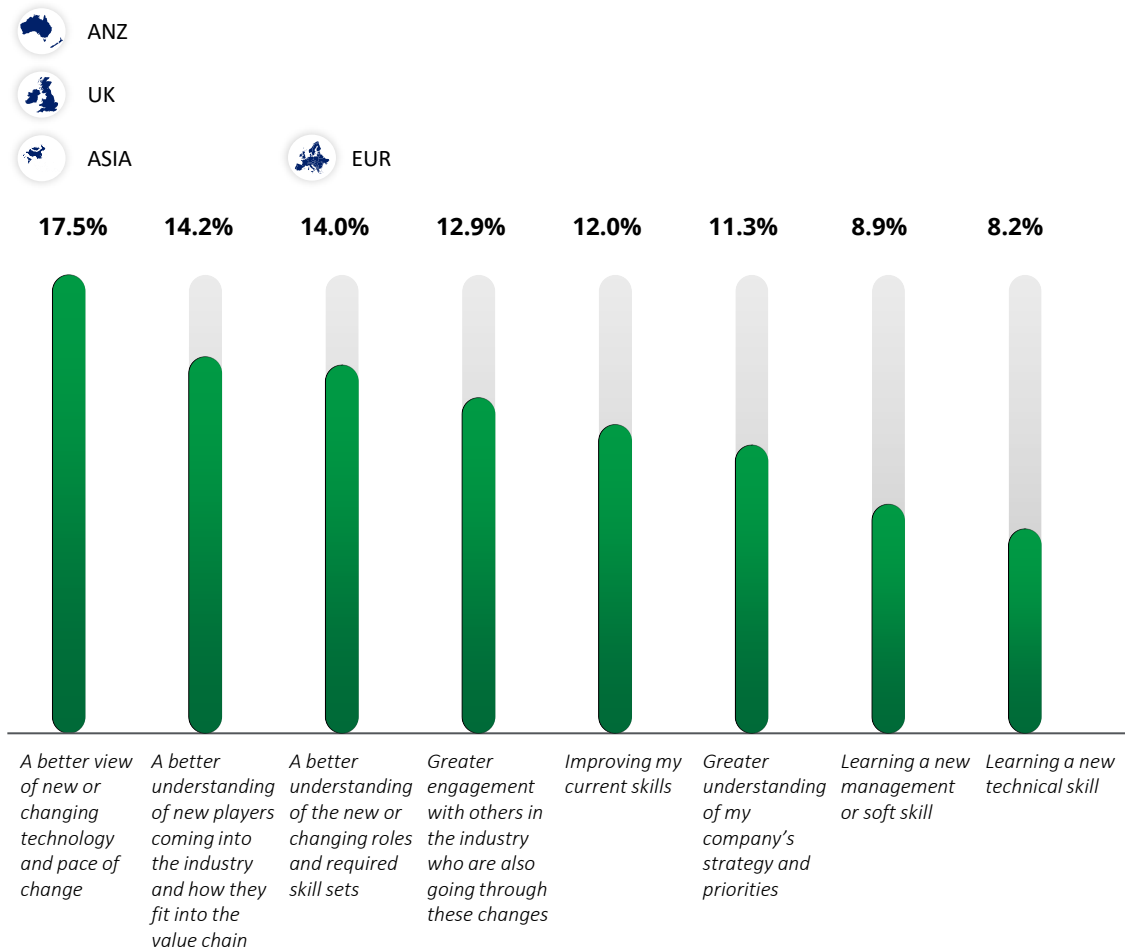
Respondents expressed concerns about the rapid pace of change in the industry and the potential impact on their careers especially about:

- **Mass adoption of electric vehicles:** preparedness of the infrastructure for charging and battery technology and disruptions to the existing supply chain and technologies also require automotive professionals to adapt to new skills and players in the market.
- **Rise of new technologies:** autonomous driving technology and artificial intelligence (AI) are creating a demand for new skillsets and expertise. Many professionals feel uncertain about their ability to adapt to these technological advancements and worry about becoming obsolete.
- **Industry disruptions:** Supply chain disruptions, geopolitical instability and economic volatility are creating a sense of uncertainty and instability within the industry. Respondents fear that these disruptions could lead to job losses, reduced career opportunities and a less predictable future.

Automotive industry professionals have valid reasons to be concerned and such concerns are compounded by the need for comprehensive training programmes focused on new technologies and skill sets. Open dialogue and collaboration with industry stakeholders, including new entrants, are crucial to prepare for the impending changes.

DIVERSITY AND INCLUSION – INDUSTRY CHALLENGES

Figure 4. What would help respondents to feel more prepared
Icon indicates top choice by geography



Note: ANZ – Australia and New Zealand, UK – United Kingdom, EUR – Europe

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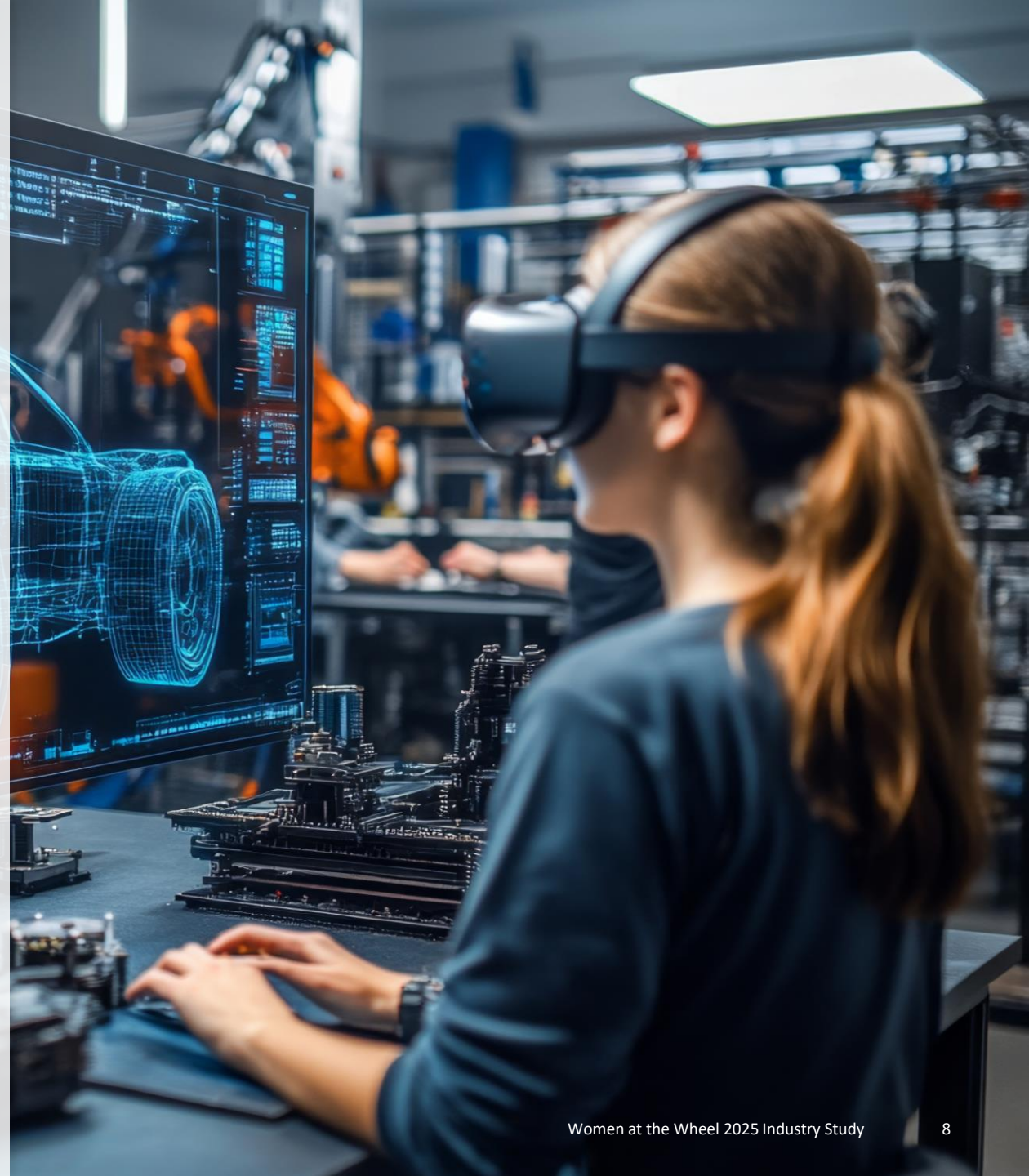


Despite the challenges, a strong undercurrent of optimism runs through the industry. Many respondents are excited about the positive opportunities that lie ahead, particularly **in the areas of sustainable mobility solutions, enhanced customer experiences enabled by AI and other emerging technologies, and the flexible working arrangements and inclusive leadership styles as a result of the pandemic.** They see this as a chance for women to contribute to a more sustainable future and to create more engaging and rewarding experiences within the industry.

This presents a crucial opportunity for organisations to empower their workforce through targeted learning and development initiatives. By fostering a diverse and inclusive environment, organisations can utilise the breadth of thought and experience offered by individuals of all genders, races and ethnicities. This report will analyse successful initiatives that have demonstrably supported women's careers within the automotive sector and the impacts from DE&I policies, offering insights and recommendations for building upon the progress achieved over the past decade.



The 'vanishing women' phenomenon is a wake-up call. We need to address the factors driving women out of the industry, to create a more equitable and successful future.



THE BUSINESS CASE FOR DIVERSITY

The automotive industry increasingly recognises the positive correlation between gender diversity and enhanced business performance, including increased innovation, more robust risk management and greater profitability. **A diverse workforce is better equipped to drive innovation in these areas and ensure that solutions using new technologies are developed and deployed ethically and responsibly from a variety of backgrounds and perspectives.** This aligns with the broader business case for diversity, which highlights that a diversity of thought, perspectives and experiences leads to better decision-making, a greater understanding of customer needs and a more agile and resilient organisation.

Still, limited career growth, outdated policies and inflexible work structures present significant barriers to achieving true gender equity within the industry. These barriers are further compounded by factors that contribute to employee attrition, particularly among women. **Our data reveals that a lack of promotional opportunities and low income driven by systemic barriers and lack of support are among the top reasons individuals consider leaving the automotive sector.** This suggests that existing workplace structures may not be adequately supporting women's career advancement, potentially leading to a loss of valuable talent and expertise.

To unlock the full potential of a diverse workforce, the automotive industry must address key challenges revealed in our findings. This requires prioritising clear career paths with competitive compensation and development opportunities, fostering a positive and respectful workplace culture, and showcasing the industry's attractiveness and future prospects. Embracing flexible work arrangements is also essential to meet the evolving needs of a diverse workforce.

However, generational differences shape perceptions of these shifts, highlighting the need for tailored approaches to address employee needs and priorities effectively.



THE BUSINESS CASE FOR DIVERSITY – BUILDING A DIVERSE AND AGILE WORKFORCE

To unlock the full potential of a diverse workforce, the automotive industry must address the unique needs of women across generations. Our findings reveal distinct perspectives on workplace changes and career priorities. By effectively engaging and empowering women at all experience levels, the industry can harness a powerful blend of experience, fresh thinking and innovation for a more agile and successful future.

EXPERIENCED WOMEN

VS

EARLY CAREER WOMEN

IMPACT FROM TRANSFORMATION



Anxiety and uncertainty: Women in this experience group tend to express concerns about job security, the need for rapid upskilling and their ability to adapt to new technologies and ways of working. This anxiety is compounded by the challenges of balancing caregiving responsibilities with demanding careers, particularly in the context of inflexible work arrangements.

NEEDS



Reskilling and upskilling opportunities: They seek access to training programmes, mentorship and clear communication about the company's vision for the future of mobility.



Flexibility: They prioritise flexible work arrangements that allow them to effectively manage caregiving responsibilities, reduce stress and maintain a healthy work-life balance.

INDUSTRY CONTRIBUTION



Experience and relationships: These women bring a wealth of experience, deep industry knowledge and a strong understanding of customer needs. Their insights are invaluable for navigating complex challenges, mitigating risks and ensuring that AI solutions are developed and deployed ethically and responsibly.

IMPACT FROM TRANSFORMATION



Excitement and opportunity: women who joined the workforce relatively recently tend to view technological advancements with a greater sense of excitement, seeing them as opportunities for career growth and specialisation in cutting-edge fields.

NEEDS



Exposure and access: They desire early exposure to new technologies and hands-on learning experiences.



In-office opportunities: They place a high value on in-office interactions for learning from experienced colleagues, networking and accessing mentorship, while establishing clear work-life boundaries.

INDUSTRY CONTRIBUTION

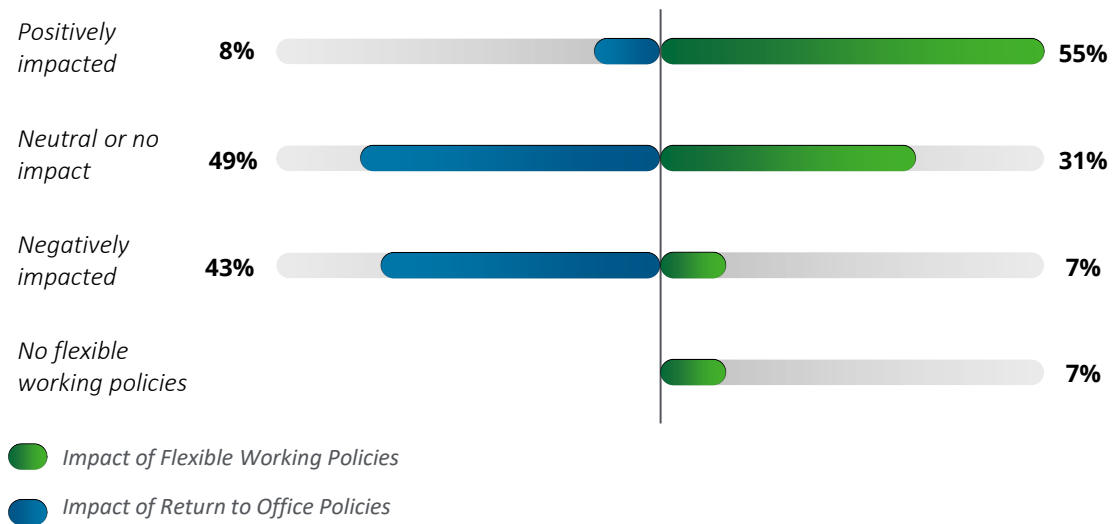


New perspectives: These women bring fresh perspectives, a willingness to embrace new technologies and a drive to innovate. Their energy and enthusiasm can spark creativity, drive the adoption of new solutions, and contribute to a more agile and adaptable organisation.

THE BUSINESS CASE FOR DIVERSITY – IMPACT FROM WORKING POLICIES

As the automotive industry grapples with rapid transformation and navigates the return to office environment post-pandemic, a key challenge emerges: balancing the need for flexibility with the desire for in-person collaboration. This challenge is particularly pronounced for women, who often face greater caregiving responsibilities and whose experiences and priorities vary significantly across generations.

Figure 5. If full-time return to office policies are implemented by your organisation, how will it impact your working experience and career in the automotive industry? Do you feel that the flexible working policies post-pandemic have impacted your working experience and career in the automotive industry?



UK and Asia indicated the most positive impact (70%) from flexible working policies



UK



ASIA



The Impact of inflexible work structures:

Outdated work-life balance policies, rigid work schedules and a lack of adequate support systems create significant barriers for women in the automotive industry. These inflexible structures often force women to make difficult choices between their careers and their families, leading to a loss of valuable talent and experience.

- **Limited flexibility:** Traditional 9-to-5 work models often clash with the unpredictable demands of childcare, eldercare and other family responsibilities, putting women at a disadvantage.
- **Increased stress and burnout:** Juggling work and caregiving responsibilities without adequate flexibility and support can lead to increased stress, burnout and potential health issues, disproportionately impacting women.
- **Career progression impediments:** Women may be overlooked for promotions, miss out on networking opportunities or feel compelled to step back from their careers due to inflexible work arrangements, hindering their career progression.



When we break down barriers for women in automotive, we don't just create a fairer industry, we create a stronger industry.

Equitable opportunities benefit everyone and unlock the full potential of the workforce.



THE BUSINESS CASE FOR DIVERSITY – IMPACT FROM WORKING POLICIES

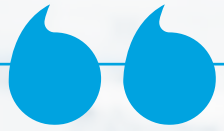
Moving beyond rhetoric to action: Creating a more equitable industry

To attract, retain and empower women in the automotive industry, a paradigm shift is required – a move away from traditional, rigid work models to more flexible and adaptable arrangements that empower all employees to manage their personal and professional lives effectively. These include:

- Embracing flexible work arrangements: Implementing hybrid work models, flexible hours, compressed workweeks and the option to work part-time without jeopardising career progression.
- Providing comprehensive support systems: Offering accessible and affordable childcare options, eldercare resources and robust mental health and wellbeing programmes.
- Fostering a culture of support: Creating an environment where women feel comfortable discussing their needs and seeking support without fear of stigma or career repercussions.

The impact of flexible working is not one-size-fits-all. It varies significantly based on individual circumstances, career stage and generational perspectives, highlighting the need for tailored approaches to workplace policies.

Knowing that diversity drives innovation, risk management and profitability, the automotive industry must prioritise creating a more inclusive and equitable workplace for women. A key aspect of this is embracing flexible work arrangements, recognising that traditional models often fail to accommodate the diverse needs of today's workforce, particularly women who frequently shoulder a greater share of caregiving responsibilities. Embracing flexible work arrangements, alongside prioritising clear career paths, equitable compensation and a positive workplace culture will be essential to attract and retain diverse talent, ultimately driving the industry's success.



Authenticity is incredibly important in role models – leaders need to be genuine in how they engage, demonstrating comfort in their own skin.

This authenticity is critical to then drive others to be comfortable and confident in their unique skills.

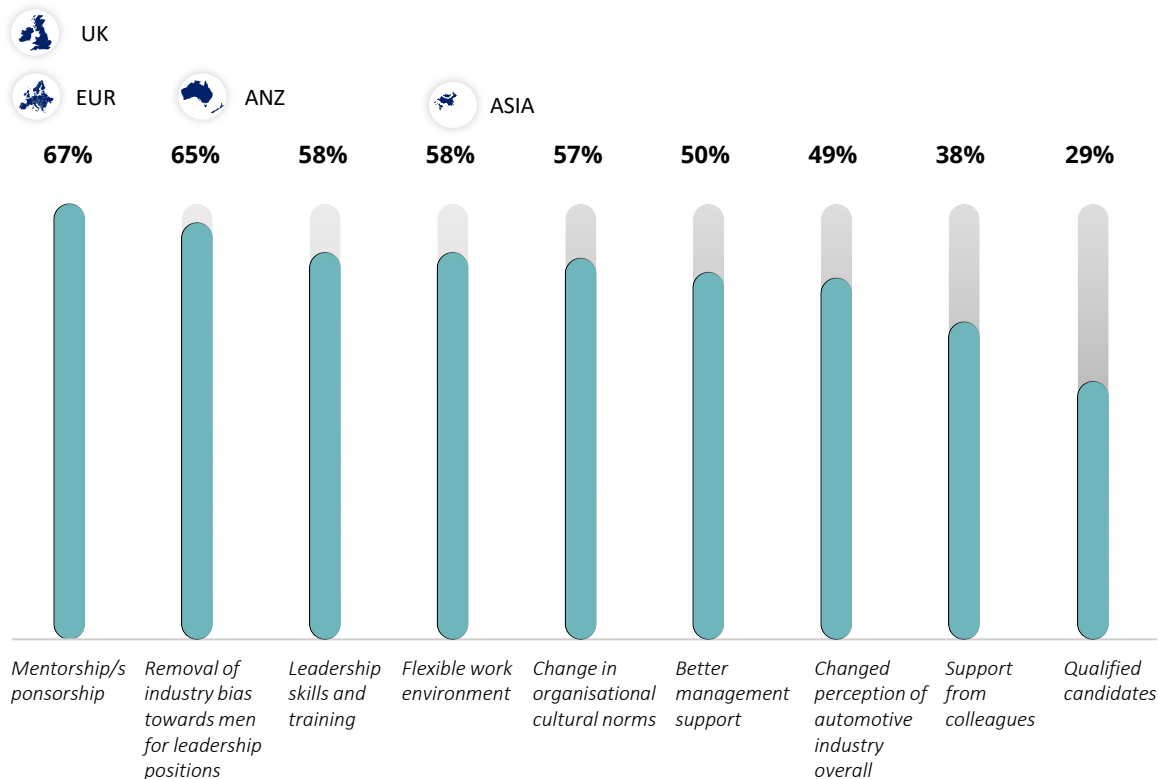


UNLOCKING THE POTENTIAL OF DIVERSITY – RECOMMENDATIONS

The automotive industry stands at a critical juncture. While the sector is undergoing a period of transformative change, progress on diversity and inclusion, particularly for women, has stagnated. Our research reveals a clear message: companies must move beyond superficial initiatives and embrace a comprehensive and systemic approach to create a truly inclusive and equitable workplace. Helpfully, there are clear steps that companies and leaders can take to keep progressing diversity and inclusion as a top priority.

Figure 6. Factors that can help women achieve career success in leadership positions in the industry
(% of respondents)

Icon indicates top choice by geography



Note: ANZ – Australia and New Zealand, UK – United Kingdom, EUR – Europe

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Organisations need to get the basics right...

Take sponsorship seriously

- Implement clear programmes to upskill leaders in sponsorship. This means requiring management to actively support and advocate for their mentees' career progression, opening doors to new opportunities and championing their achievements. Recognise and reward this behaviour. Call for your leaders to offer support and guidance in navigating difficult situations, such as dealing with bias or discrimination, managing work-life balance or overcoming career setbacks.
- Create a culture that values honest feedback. Expect your leaders to be focused on delivering the next generation of critical thinkers by providing constructive feedback that helps future leaders identify areas for improvement and skills development. If needed, implement this into goals setting and performance management.

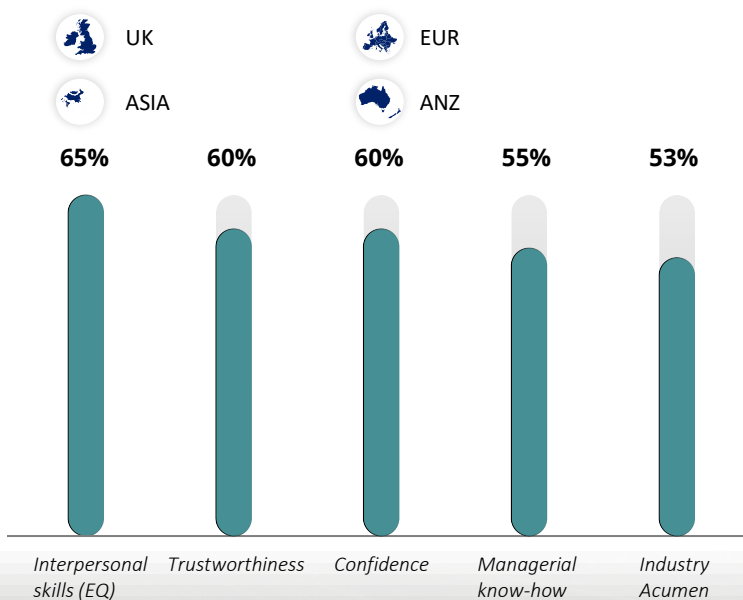
Address unconscious bias at mid-management and beyond, not just exec level

- Implement unconscious bias training across the entire organisation – moving beyond historical focus on C-suite and top management. Change needs to be led from the top but it is time to filter down.
- Implement clear processes and promotion criteria to make identification of bias easier – and allow for increase in equitable promotion practices.
- Consider how you train your next generation of leaders – we heard across the board that more information is required on strategy, how to adapt to changing trends and training for managers on how to effectively manage flexible work arrangements and support employees with caregiving responsibilities.

UNLOCKING THE POTENTIAL OF DIVERSITY – RECOMMENDATIONS

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Figure 7. Top 5 attributes of a successful leader (% of respondents)
Icon indicates top choice by geography



Recognise and even reward authentic role models

- Our research found that core characteristics of authenticity focused on strong communication, open sharing of personal resilience, teamwork and a belief in the brand.
- Core to view of authenticity was leaders' adaptability and resilience. We clearly heard that the ability for leaders to adapt to change, overcome challenges and bounce back from setbacks created trust and followership. However, too frequently respondents also saw that these situations hold back those they saw as "good leaders".
- Respondents consistently emphasised the importance of authenticity in leadership. They seek leaders who are genuine, transparent and approachable, who lead with integrity and empathy, and who create a workplace culture where everyone feels valued and respected.

Understand that policies matter

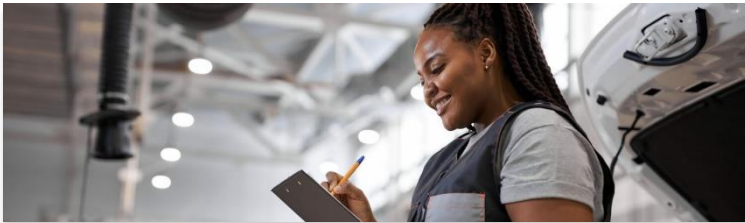
While they seem basic, a significant number of respondents noted many such policies are missing in their current organisations.

- Implement anonymised recruitment across CVs and interview processes to mitigate unconscious bias in hiring decisions. This involves removing identifying information, such as names and gender, from resumes during the initial screening process.
- Make the promotion process transparent and accessible to all employees. Provide clear guidelines on how to apply for promotions and what the evaluation criteria are.
- Implement formal policies that support flexible work arrangements, such as hybrid work models, compressed workweeks and flexible start and end times.
- Offer generous and supportive parental leave policies for both mothers and fathers, encouraging shared.

UNLOCKING THE POTENTIAL OF DIVERSITY – RECOMMENDATIONS

Advancing women in the automotive workplace is not just a matter of ticking boxes or implementing a few isolated initiatives. It requires a fundamental shift in mindset, a commitment to continuous improvement and a collective effort from all levels of the organisation. By embracing these recommendations, the automotive industry can create a more inclusive, equitable and ultimately more successful future for all.

Organisations that want to take the lead in DE&I need to...



Put diversity into leadership & challenge stereotypes:

- Increase the visibility of women and other under-represented groups in leadership positions to provide role models and demonstrate career progression possibilities. This can be achieved through targeted recruitment, leadership development programmes as well as public recognition.
- Develop marketing and outreach campaigns that showcase the diverse range of careers available in the automotive industry and target women and under-represented groups.
- Partner with educational institutions to promote STEM careers to girls and young women.
- Ensure that women are well represented as speakers and panelists at industry events and conferences.



Foster allyship at all levels

- Encourage and equip male colleagues to actively support diversity and inclusion initiatives, challenge bias and advocate for their female peers.
- Offer training programmes that educate employees about the importance of allyship and provide practical strategies for becoming an effective ally.
- Foster a workplace culture where allyship is valued and recognised.
- Promote the use of inclusive language and behaviours in all workplace interactions to create a more welcoming and respectful environment for everyone. This includes language guidelines, training on microaggressions and leading by example.



Take commitments public – and hold leaders responsible for progress

- Regularly publish data on diversity metrics, including gender representation, pay equity and promotion rates. Be transparent about both successes and challenges.
- Tie diversity goals to leadership performance evaluations and compensation. Recognise and reward leaders who champion D&I and hold those who fall short accountable.
- Conduct regular assessments of company culture and practices to identify and address areas for improvement. Use employee surveys, focus groups and exit interviews to gather feedback and identify areas where bias or exclusion may be occurring.

UNLOCKING THE POTENTIAL OF DIVERSITY – RECOMMENDATIONS

Organisations need to be at the forefront of driving increased diversity across the industry, – but few would disagree that individual actions are also critical to realising the future we all believe is possible.

...are you the role model you want to see?

Consciously using inclusive language and purposefully ensuring behaviours in all interactions **create a more welcoming and respectful environment** for those around you

Lift as you rise – proactively thinking about the diverse candidates you sponsor/mentor as you grow in your career – free of bias

Purposefully growing and managing a **diverse network** across levels, functions and even organisations – helping and supporting your network

Embrace authenticity in your interactions and think about the impact you leave each interaction. Be the leader you want to see in others

Actively working to **change the perception of the automotive industry** as male-dominated, taking speaking roles offered, sharing your career highlights, celebrating successes of the diversity around you

SURVEY RESPONDENTS

About the study

- The survey was conducted between 16 October and 20 December 2024. Nearly 600 men and women completed an online survey from more than 25 countries, representing apprentices through to senior leaders, from original equipment manufacturers (OEMs), suppliers, dealers, finance companies and other organisations across the automotive value chain.
- Interviews were then conducted with respondents representing engineering, marketing, talent and other business areas.
- The purpose of the study was to generate a representative point of view on how individuals, organisations and the industry can drive greater gender diversity and inclusion through the retention and advancement of women working in the automotive industry.

Figure 8. Breakdown by country (%)

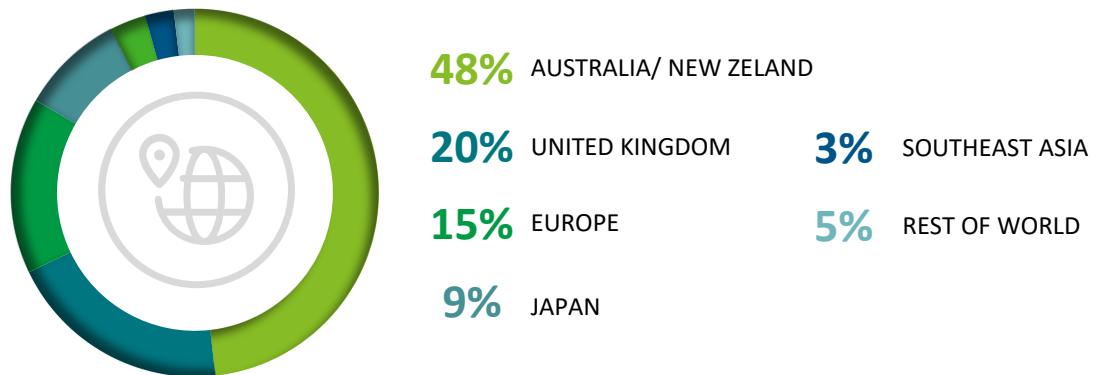
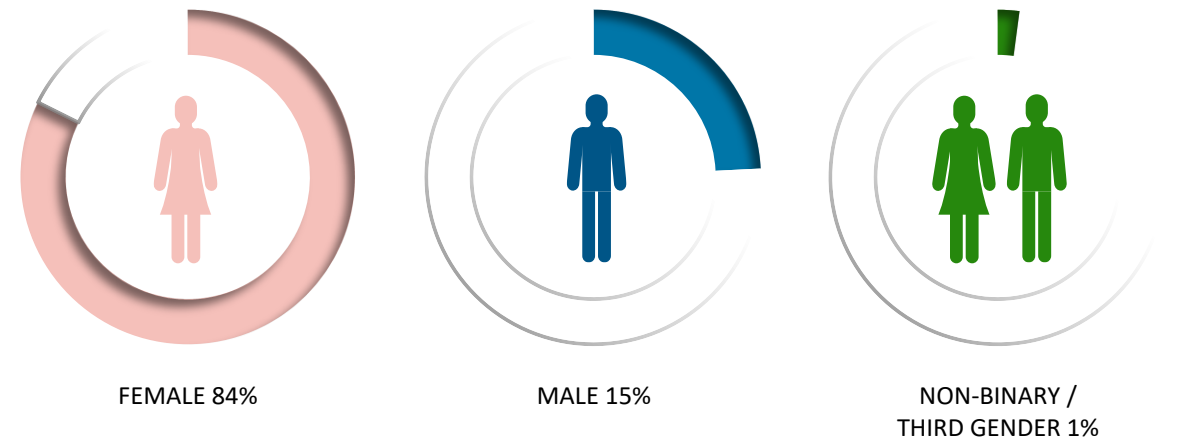


Figure 9. Breakdown by gender (%)



SURVEY RESPONDENTS

About the study

Figure 10. Breakdown by seniority (%)

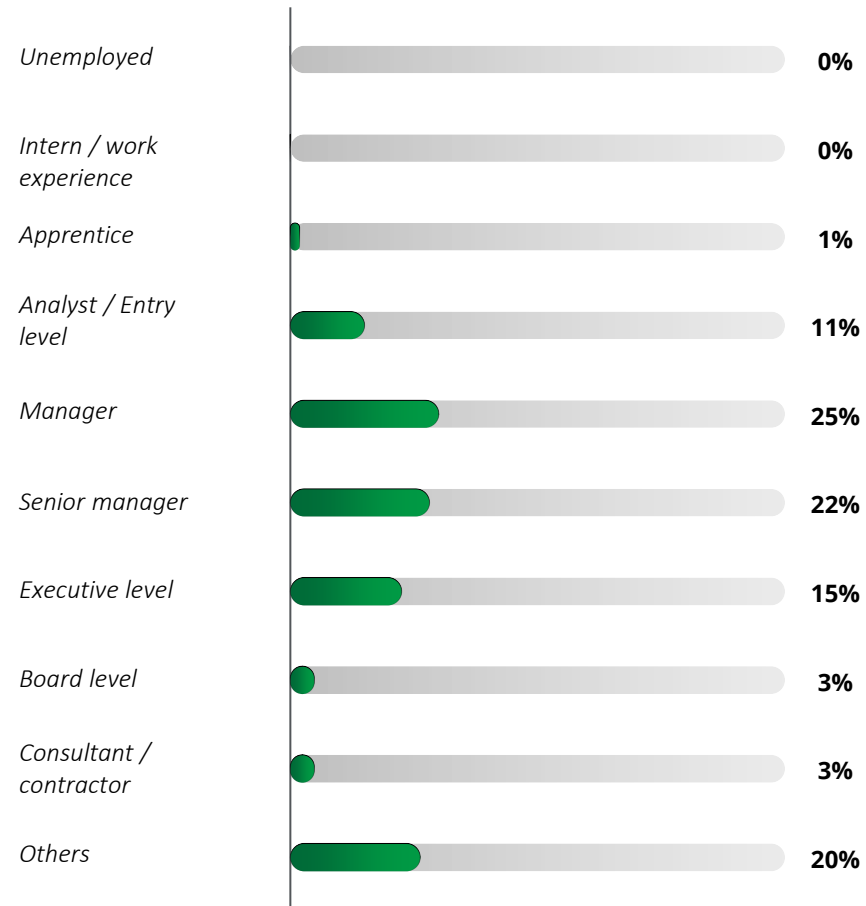


Figure 11. Breakdown by education level (%)

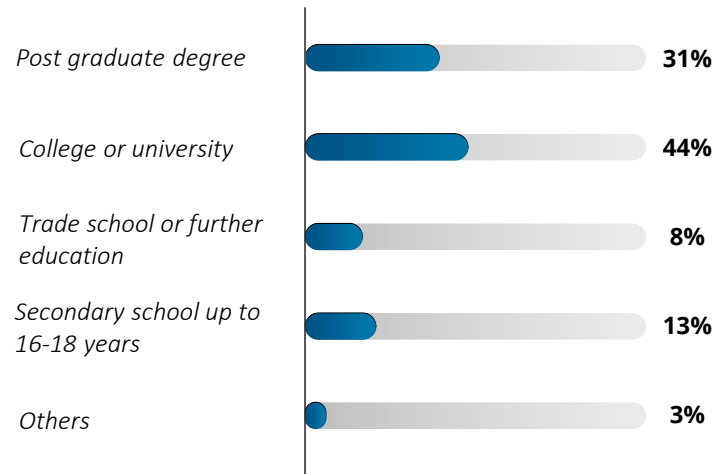
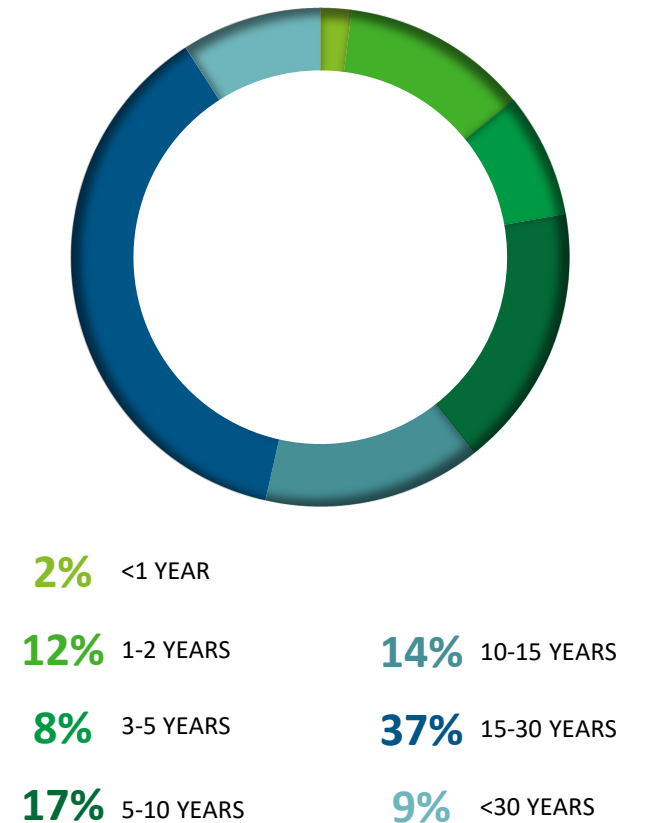


Figure 12. Breakdown by number of years in the automotive industry (%)



SURVEY RESPONDENTS

About the study

Figure 13. Breakdown by function (%)

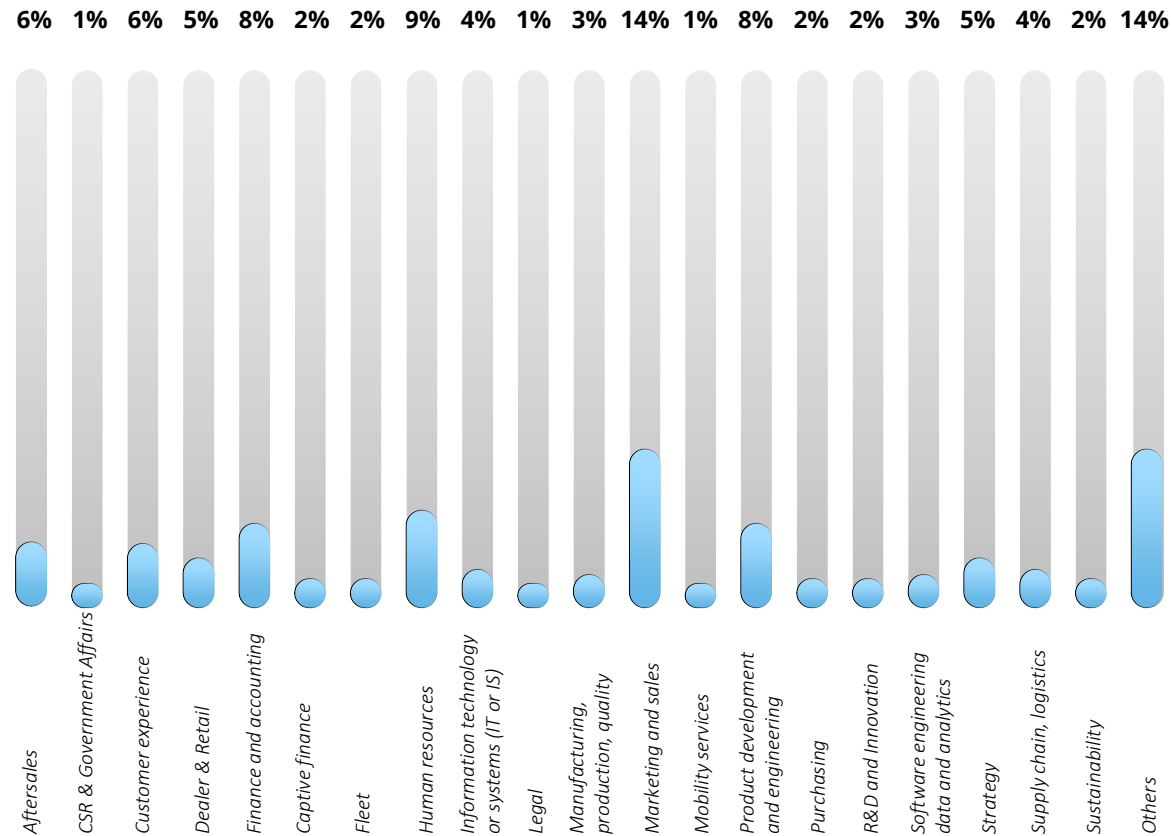
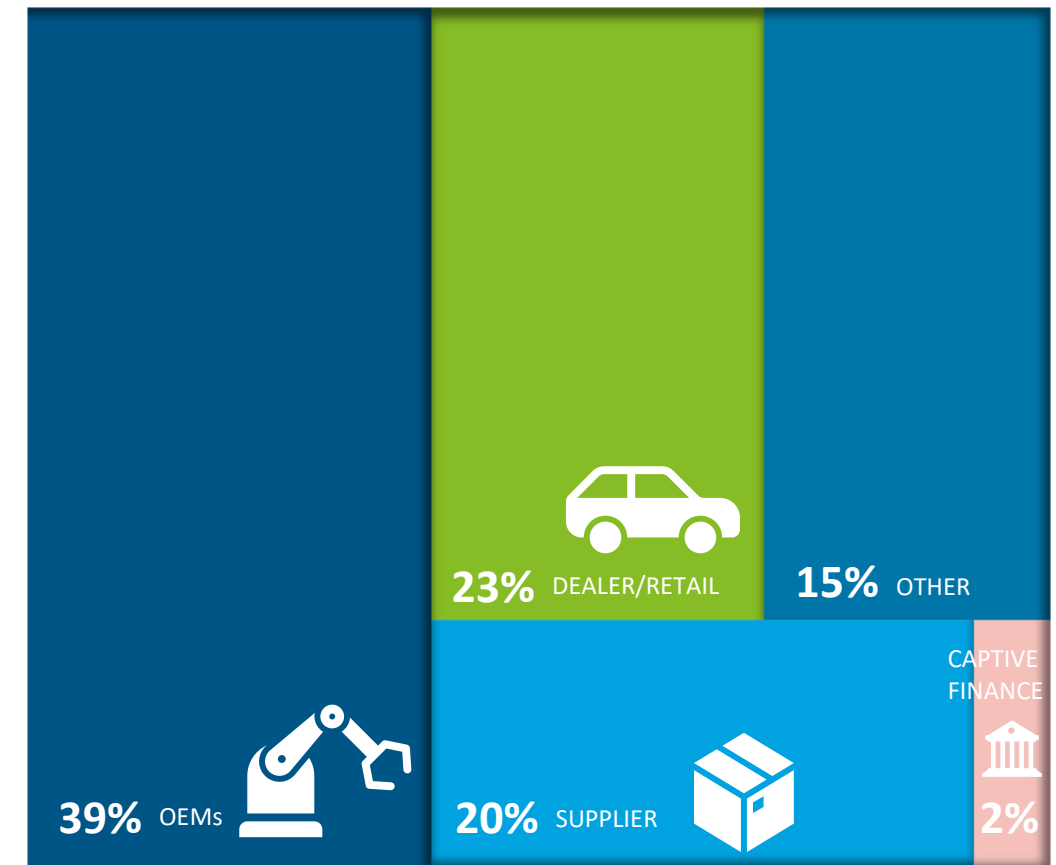


Figure 14. Breakdown by organisation (%)



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