
Colour, Materials & Finish (CMF) Survey 2025
In partnership with

EXECUTIVE SUMMARY

Colour, Materials & Finish (CMF) remains an essential emotional vocabulary by which vehicle designers, and in particular vehicle interior design departments, express their individual brand identity, differentiate themselves from the competition, and appeal to their target consumer base.

The **Car Design News Colour, Material & Finish (CMF) Survey 2025** has established itself as an annual litmus test for CMF within car design, but also casts a critical eye towards the future of car design, imparting authoritative expert insight, whilst also giving back to the car design community.

Colour trends

Q1. Earthy tones were the dominant colour trend for vehicle interiors

Earthy tones and (in a distant second place) **Achromatic hues** were the leading trends globally, but also across most regions and design roles.

Q2. Achromatic hues led the exterior colour trend, but results were more evenly balanced

Achromatic hues scored in first place globally, closely followed by **Earthy tones, Prime colours** and **Pastels. Achromatic** hues were the leading trend in most regions. However, the results were more varied by design role.

Q3. Distinctly different colour preferences across the vehicle segments

In the **Affordable / budget vehicle** segment, **Bold & vibrant hues** were the leading colour theme. For the **Mid-market** vehicle segment, **Earthy Tones** were the leading colour theme. In the L**uxury / premium** vehicle segment **Metallics** were the leading colour theme. However, there was some variances by regions and design roles.

Q4. Clear exterior colour palette preferences across the different regions

Metallics were the leading exterior colour palette within **North America,** whereas Europe favoured **Earthy tones** more. In **Asia**, **China** favoured **Metallics**, whilst **Japan** preferred **Monochrome** and **Achromatic tones**. Furthermore, there was some variance by design role.

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Material trends

Q5. Bio-based materials and Synthetics dominate interior materials

Three materials dominated the survey findings globally: **Bio-based materials (e.g. mushroom leather),** conventional **Synthetics (plastics, recycled plastic),** and **Natural textiles**. Although there were some regional and design role variances, those three materials dominated the results.

Q6.Sustainability & Integrated technology dominate materials innovation

Within the area of materials innovation, the leading response was **Sustainability** closely followed by **Integrated technology (touchscreens, smart surfaces, HUD),** and in third place was **Lightweighting.** There was some variance by region and design role, but the same three main issues predominated.

Finish trends

Q7. Smart surfaces dominate vehicle interior finish trends

The major trend was **Smart surfaces (touch responsive, haptic feedback, light emitting),** followed in a relatively distant joint 2nd place by **Health / wellness (e.g. anti-microbial, temperature regulating)**, and **Personalisation**. **Smart surfaces** dominated in **Europe, North America** and **Japan**, whilst **Health / wellness (e.g. anti-microbial, temperature regulating)**, led in **China.**

Q8. Notably different exterior finish preferences across the regions

For the **Affordable / budget** segment, the leading finish trend for vehicle exteriors was **Gloss**. Within the **Mid-market** segment, the most popular finish was **Metallics**, whilst for the **Luxury / premium** segment, the dominant finishes was **Satin**, closely followed by **Pearlescent**. In terms of regional variance, **Japan** was the only major outlier, and among design roles, there was some small variation.

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EXECUTIVE SUMMARY

Cultural and consumer influences

Q9. Differing societal trends influencing CMF choices by region

North America had a balanced, wide ranges of influences with **Wellness, Digitalisation, Digital 'detoxing',** and **Cocooning.** However, **Europe** had a clearer preference for **Digital 'detoxing',** and **Wellness,** whilst in **China, Digitalisation** was the dominant influence, and In **Japan** the major influence was **Cocooning**. There was some variance by design roles.

Q10. Clearcut generational differences with interior preferences

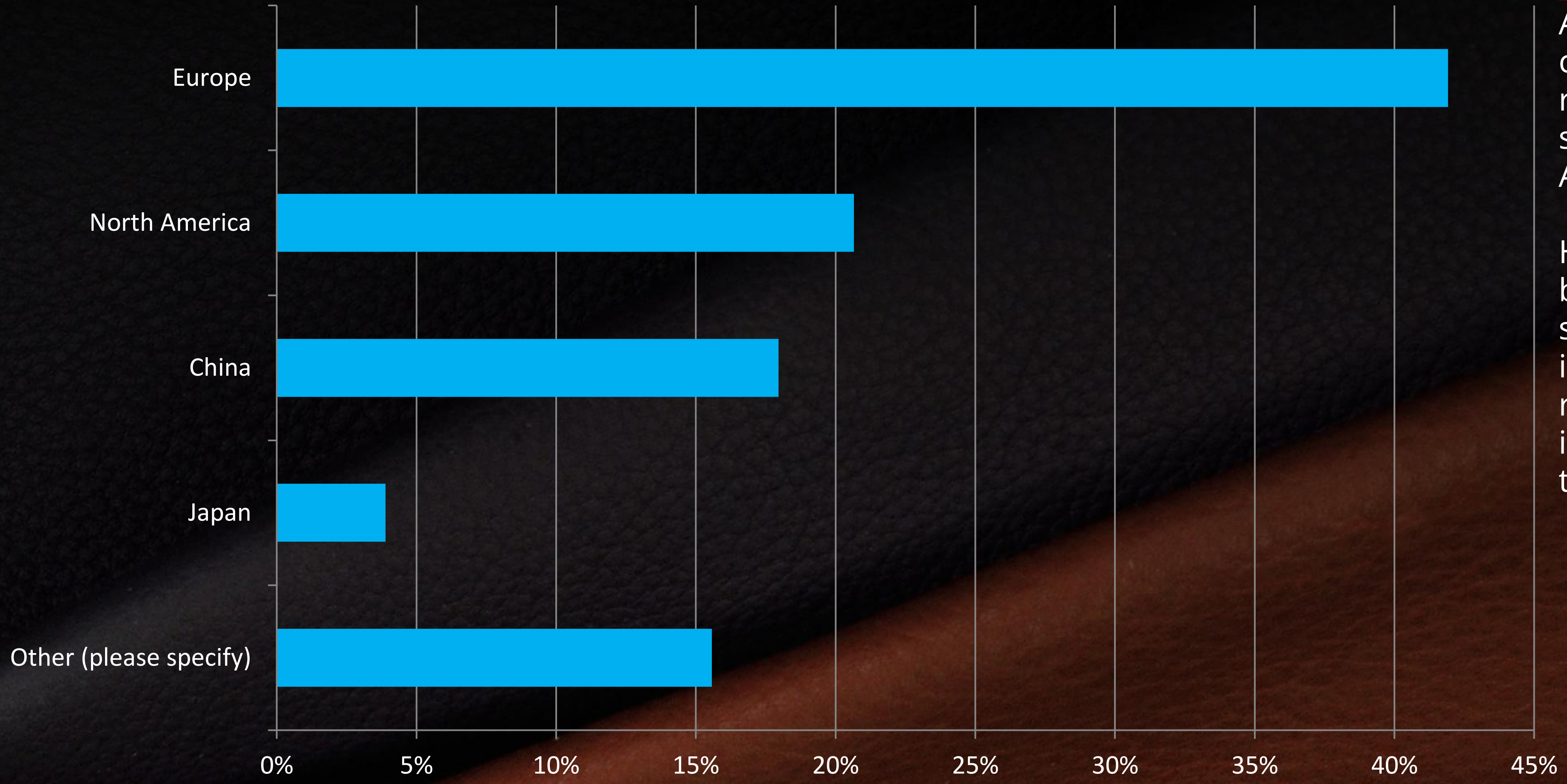
The **Baby boomers** strongly prioritised **Comfort** and **Traditional Materials. Generation X** had more of a balance of priorities such as **Comfort , Minimalism, Traditional Materials, Sustainable Materials,** and **Smart Surfaces / Tech Integration**. For **Millennials, t**here was a stronger bias towards **Sustainable Materials,** and **Smart Surfaces / Tech Integration.** For **Generation Z,** they strongly prioritised **Smart Surfaces / Tech Integration,** and **Sustainable Materials.** There was some small variation by region, most notably **Japan**, but in terms of design roles, they followed the global picture with a clear generational divide.

Q11. Different aspects of CMF prioritised according to vehicle segment

For the **Affordable / budget** vehicle segment **Minimalism** was prioritised. However, within the **Mid-market** vehicle segment the preferences were wider ranging, including **Sustainable Materials, Comfort, Smart Surfaces / Tech Integration,** and **Maximalism.** In the **Luxury / premium** segment, the priority was **Comfort** and **Smart Surfaces / Tech Integration.** Interestingly, in terms of regional variances, there was a clear East-West divide, and some variances according to design role.

DEMOGRAPHICS - REGION

Where are you based?



A strong response from Europe

Although the European segment comprised over 42% of survey responses, this was balanced by strong responses from North America and Asia, particularly China.

However, the detailed regional breakouts shown throughout this survey report provide more detailed insight into the differing regional responses allowing readers to identify more specific responses from those regions.

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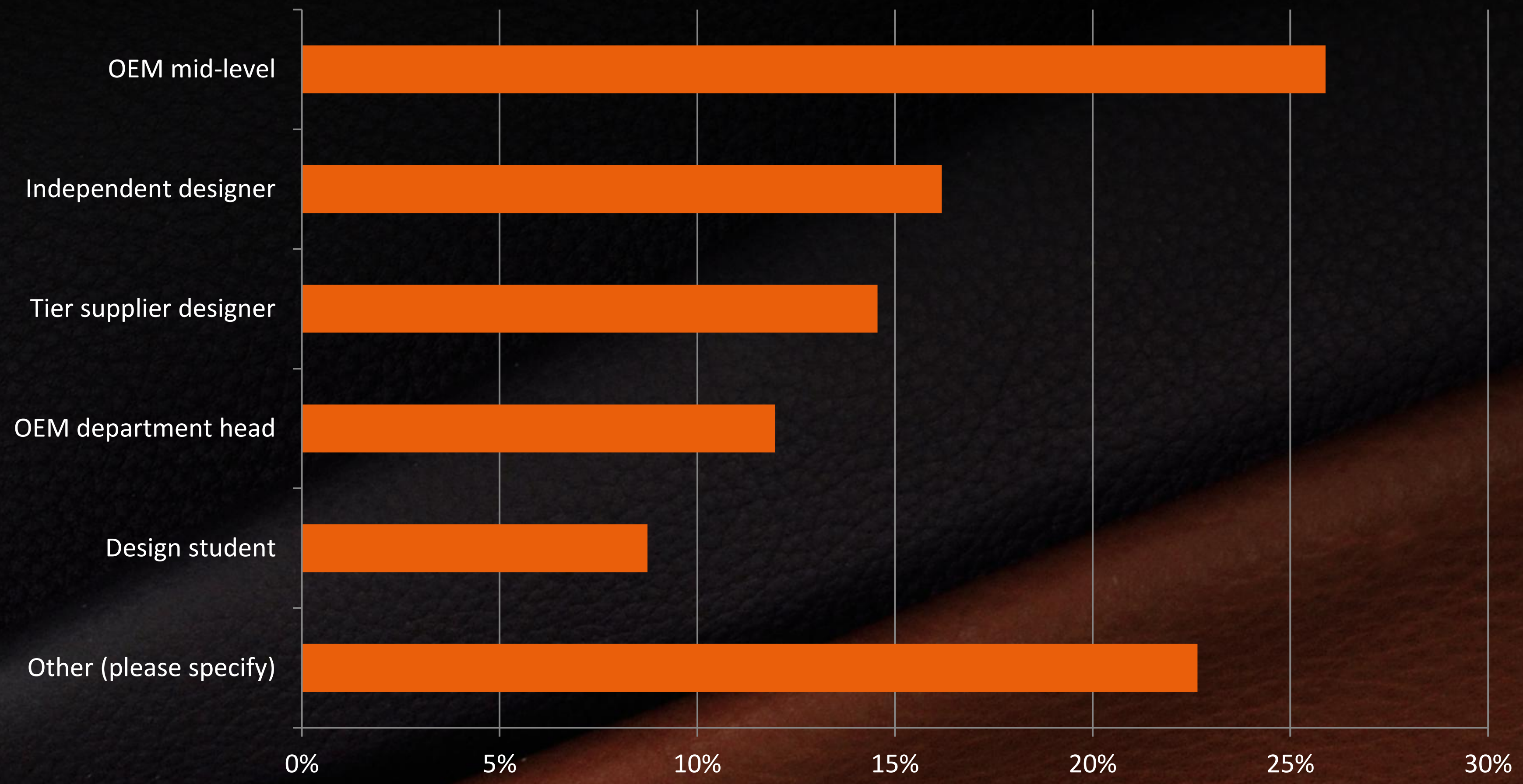
DEMOGRAPHICS – DESIGN ROLE

What is your role?



A good mixture of respondents

The audience comprised a broad range of vehicle design experts with varying levels of seniority, providing a good mixture of industry opinion.

The 'Other' category included a mixture of job titles with varying design roles including designers, design associates, lead designer, design chief, head of design, CMF designer, design manager, studio leads, engineers, product designer, industrial designer, clay modeller, academia, and automotive media.

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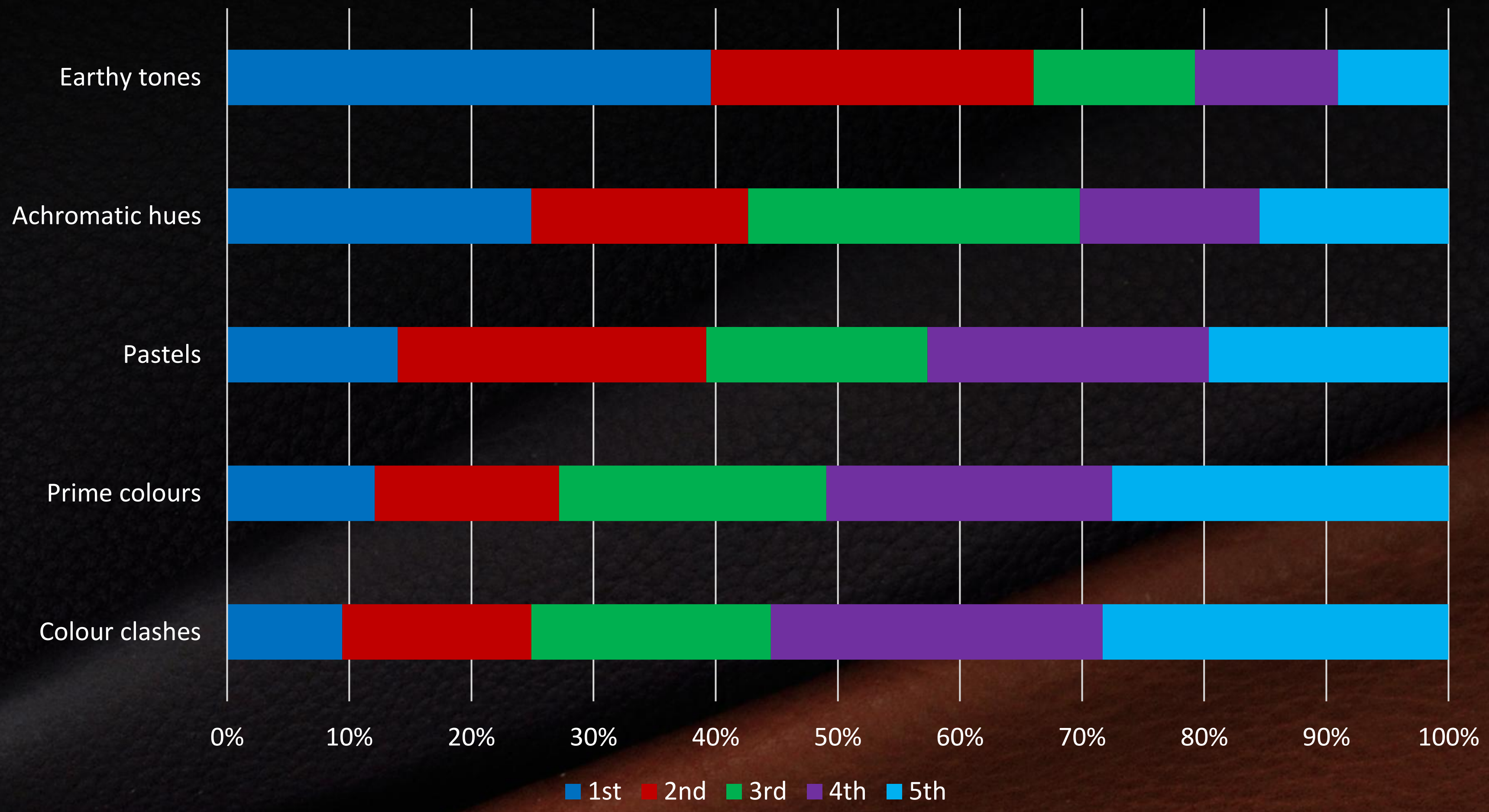
COLOUR TRENDS - GLOBAL

Q1. For vehicle INTERIORS, what will be the main COLOUR trends in 2025?



Earthy tones the dominant colour trend for vehicle interiors

For vehicle interiors, the dominant colour trend according to survey participants was clearly **Earthy tones with (40%)** reporting it in first place.

In a distant second place, was **Achromatic hues with (25%)** selecting it as the most important colour trend. In third place, were **Pastels (13%),** and in fourth place was P**rime colours (12%).**

The least popular colour trend was **Colour clashes (10%).**

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COLOUR TRENDS - VARIANCES

Q1. For vehicle INTERIORS, what will be the main COLOUR trends in 2025?

Top 3 colour trends by region:

Earthy tones and **Achromatic hues** were the leading trends in most regions. However, in **China**, the preferences were much more evenly balanced among their top 3 responses.

Europe	North America	China	Japan	Other
1 Earthy tones 41% 2 Achromatic hues 23% 3 Pastels 20%	1 Earthy tones 43% 2 Achromatic hues 34% 3 Colour clashes 9%	1 Earthy tones 28% 2 Prime colours 28% 3 Achromatic hues 26%	1 Earthy tones 43% 2 Achromatic hues 29% 3 Colour clashes 29%	1 Earthy tones 43% 2 Achromatic hues 22% 3 Pastels 17%

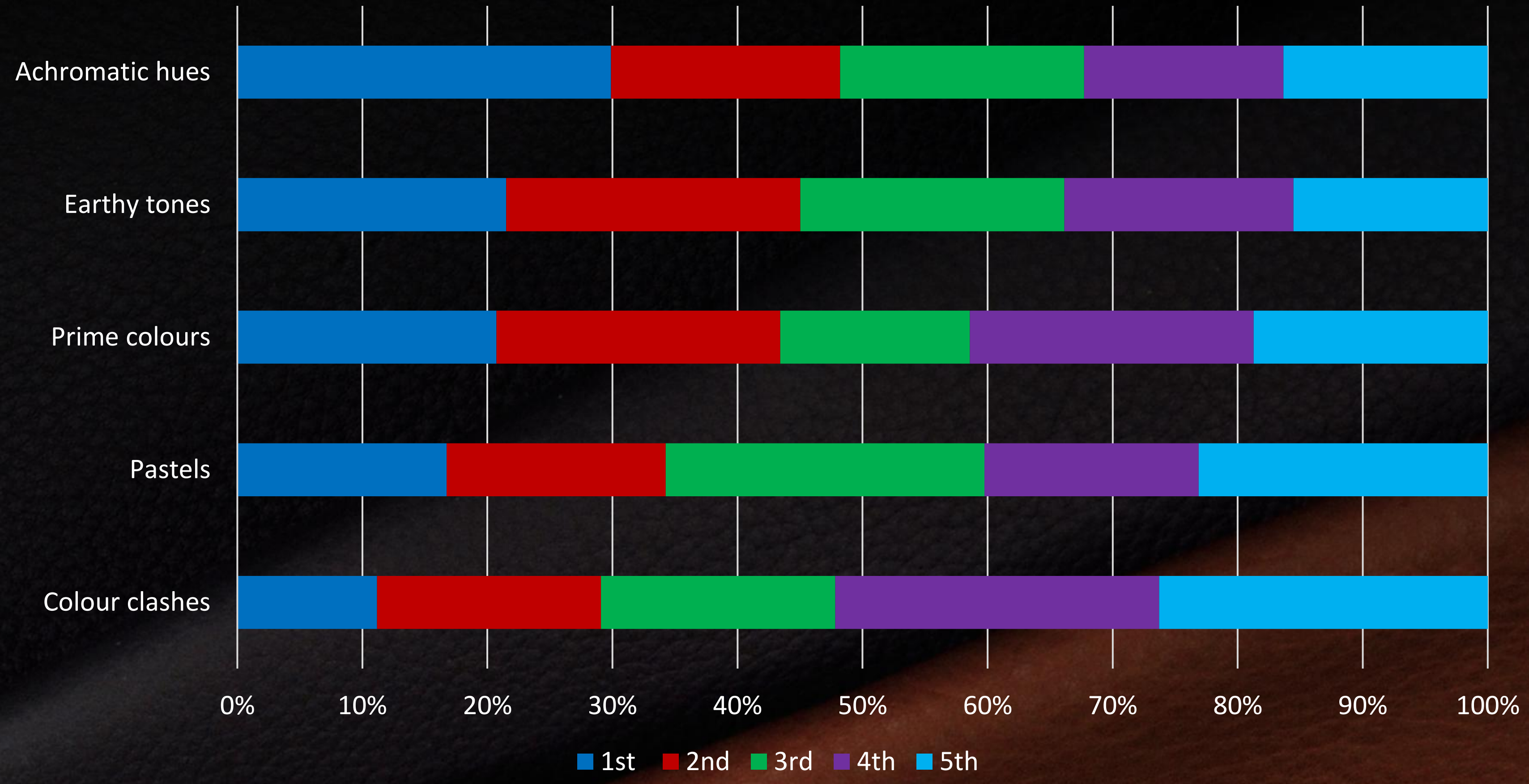
Top 3 colour trends by design role:

Earthy tones were the leading trends across most design roles, particularly for **OEM department heads**, and particularly **Tier supplier designers**. **Achromatic hues** were the 2nd place trend across most design roles.

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
1 Earthy tones 50% 2 Achromatic hues 26% 3 Primes colours 9%	1 Earthy tones 38% 2 Achromatic hues 22% 3 Pastels 17%	1 Earthy tones 64% 2 Achromatic hues 17% 3 Prime colours 7%	1 Earthy tones 31% 2 Achromatic hues 23% 3 Prime colours 21%	1 Achromatic hues 33% 2 Prime colours 21% 3 Pastels 17%

COLOUR TRENDS - GLOBAL

Q2. For vehicle EXTERIORS, what COLOUR trends will be most prominent in 2025?



Colour trends for vehicle exteriors more evenly balanced

For vehicle *exteriors*, the relative colour trends were noticeably different to the interiors of the previous question, and also notably more evenly balanced, with no dominant trend.

Achromatic hues the leading exterior colour trend

Nevertheless, the leading colour trend according to survey participants was **Achromatic hues** with **(30%)** citing it in first place.

In 2nd place, participants selected **Earthy tones with (22%),** closely followed by **Prime colours (21%).** In 4th place were **Pastels with (17%).** The least popular colour trend was **Colour clashes** with **(11%)** citing it as the leading colour trend.

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COLOUR TRENDS - VARIANCES

Q2. For vehicle EXTERIORS, what COLOUR trends will be most prominent in 2025?

Top 3 colour trends by region:

Achromatic hues was the leading trend in most regions albeit by a small margin. However, in Japan, **Earthy tones** were the dominant trend.

Europe	North America	China	Japan	Other
1 Achromatic hues 30% 2 Earthy tones 22% 3 Pastels 22%	1 Achromatic hues 32% 2 Earthy tones 28% 3 Prime colours 20%	1 Achromatic hues 31% 2 Prime colours 24% 3 Colour clashes 20%	1 Earthy tones 50% 2 Achromatic hues 33% 3 Prime colours 17%	1 Prime colours 28% 2 Achromatic hues 23% 3 Pastels 23%

Top 3 colour trends by design role:

Results were quite varied by design role. **Pastels** were the leading colour trend for **OEM department heads**. However. **Achromatic hues** were the leading trend for **OEM mid-level** and **Tier supplier designers**. **Independent designers** favoured **Earthy tones**, followed by P**astels.**

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
1 Pastels 32% 2 Achromatic hues 24% 3 Earthy tones 21%	1 Achromatic hues 33% 2 Earthy tones 27% 3 Primes colours 22 %	1 Achromatic hues 35% 2 Prime colours 23% 3 Pastels 15%	1 Earthy tones 32% 2 Pastels 24% 3 Achromatic hues 18%	1 Colour clashes 27% 2 Prime colours 23% 3 Pastels 18%

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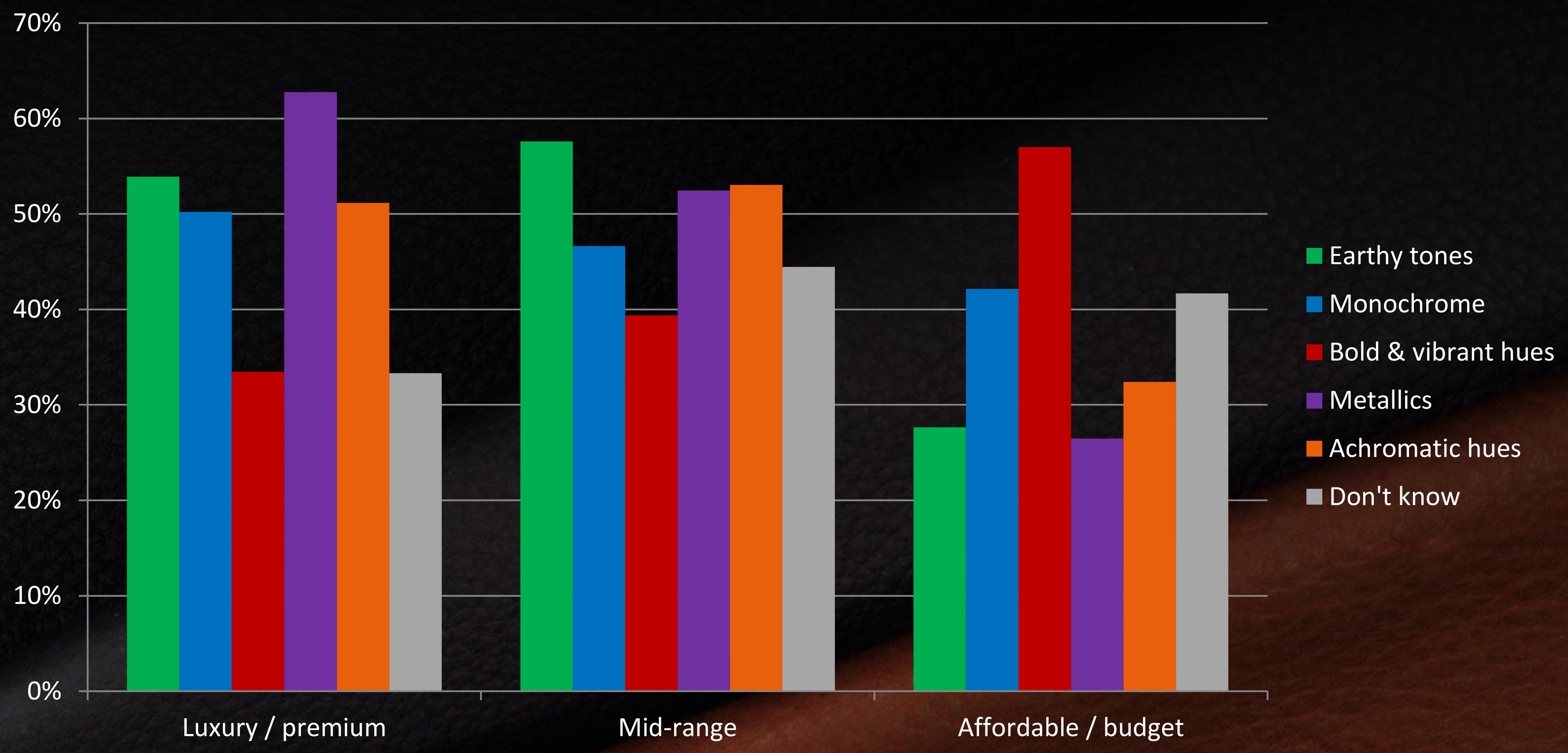
COLOUR TRENDS - GLOBAL

Q3. Which COLOUR THEMES will be most prominent in each vehicle segment?



Bold & vibrant hues for affordable / budget

In the affordable/budget vehicle segment, **Bold & vibrant hues (57%)** were the leading colour theme, followed by **Monochrome (42%), Achromatic hues (32%),** and **Earthy Tones (28%).** The least popular colour theme was **Metallics (26%).**

Earthy tones in the mid-range

For the mid-range vehicle segment, **Earthy Tones (58%)** were the leading colour theme, followed by **Achromatic hues (53%), Metallics (52%),** and **Monochrome (47%),** In last position was **Bold & vibrant hues (39%),** contrasting with the **Affordable / budget** segment.

Metallics for luxury / premium

In the **Luxury / premium** vehicle segment the rankings were notably different. **Metallics (63%)** were the leading colour theme, followed by **Earthy Tones (54%)**, and **Achromatic hues (51%),** and **Monochrome (50%).** The least popular colour theme was **Bold & vibrant hues (34%).**

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COLOUR TRENDS - VARIANCES

Q3. Which COLOUR THEMES will be most prominent in each vehicle segment?

Top 3 colour themes by region:

There was some variances by regions, albeit the **Affordable / budget** segment favouring **Bold & vibrant hues** and **Luxury / premium, Metallics**
Europe's Affordable / budget segment favoured **Bold & vibrant hues,** the **Mid-market, Achromatic hues,** and **Luxury / premium, Metallics.**
North America's Affordable / budget segment favoured **Bold & vibrant hues,** the **Mid-market, Earthy tones,** and **Luxury / premium, Metallics.**
In **China**, the **Affordable / budget** segment favoured **Monochrome,** the **Mid-market, Bold & vibrant hues,** and **Luxury / premium, Metallics.**
For **Japan**, the **Affordable / budget** segment favoured **Achromatic hues,** the **Mid-market, Earthy tones,** and **Luxury / premium, Metallics.**

Europe	North America	China	Japan	Other
Affordable: / budget 1 Bold & vibrant hues 58% 2 Monochrome 50% 3 Achromatic hues 29%	**Affordable: / budget** 1 Bold & vibrant hues 76% 2 Monochrome 39% 3 Achromatic hues 38%	**Affordable: / budget** 1 Monochrome 45% 2 Bold & vibrant hues 38% 3 Earthy tones 29%	**Affordable: / budget** 1 Achromatic hues 40% 2 Bold & vibrant hues 40% 3 Monochrome 20%	**Affordable: / budget** 1 Bold & vibrant hues 54% 2 Achromatic hues 41% 3 Metallics 38%
Mid-market 1 Achromatic hues 55% 2 Monochrome 52% 3 Earthy tones 50%	**Mid-market** 1 Earthy tones 79% 2 Metallics 64% 3 Achromatic hues 57%	**Mid-market** 1 Bold & vibrant hues 49% 2 Achromatic hues 45% 3 Earthy tones 45%	**Mid-market** 1 Earthy tones 60% 2 Achromatic hues 40% 3 Metallics 40%	**Mid-market** 1 Earthy tones 65% 2 Metallics 56% 3 Bold & vibrant hues 54%
Luxury / premium 1 Metallics 68% 2 Earthy tones 59% 3 Achromatic hues 52%	**Luxury / premium** 1 Metallics 76% 2 Monochrome 70% 3 Achromatic hues 64%	**Luxury / premium** 1 Metallics 53% 2 Earthy tones 45% 3 Bold & vibrant hues 43%	**Luxury / premium** 1 Metallics 60% 2 Earthy tones 60% 3 Achromatic hues 60%	**Luxury / premium** 1 Earthy tones 60% 2 Monochrome 59% 3 Metallics 46%

COLOUR TRENDS - VARIANCES

Q3. Which COLOUR THEMES will be most prominent in each vehicle segment?

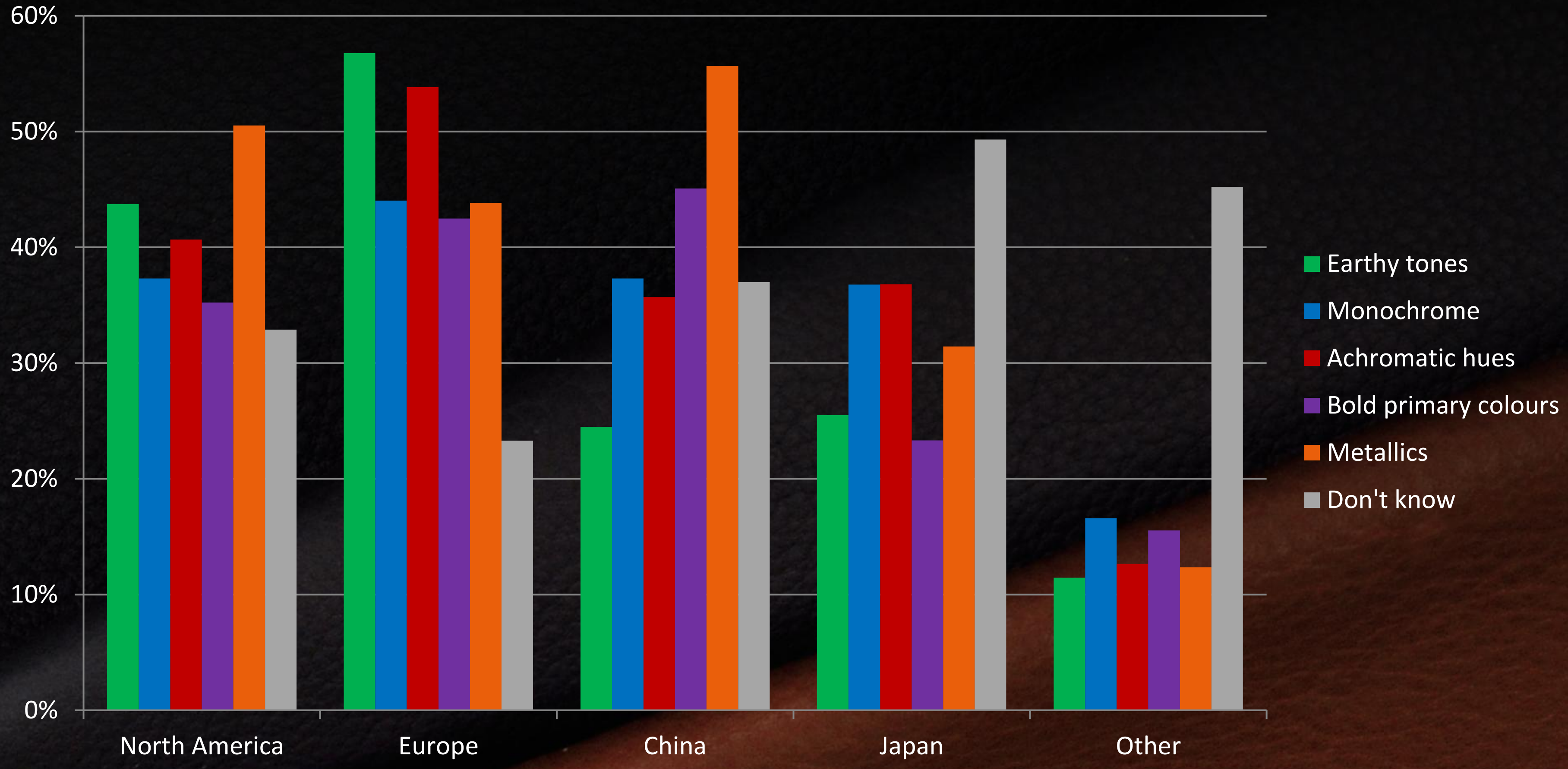
Top 3 colour themes by design role::

There was some variances by design role, albeit with **Affordable / budget** all favouring **Bold & vibrant hues** and **Luxury / premium, Metallics.**
For **OEM department heads**, the **Affordable / budget** favoured **Bold & vibrant hues, Mid-market, Achromatic hues,** and **Luxury / premium, Metallics.**
For **OEM Mid-level**, the **Affordable / budget** favoured **Bold & vibrant hues, Mid-market, Earthy tones,** and **Luxury / premium, Earthy tones.**
For **Tier supplier designers**, the **Affordable / budget** favoured **Bold & vibrant hues, Mid-market, Earthy tones,** and **Luxury / premium, Metallics.**
For **Independent designers**, the **Affordable / budget** favoured **Bold & vibrant hues, Mid-market, Achromatic hues,** and **Luxury / premium, Metallics.**

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
Affordable: / budget 1 Bold & vibrant hues 59% 2 Monochrome 41% 3 Achromatic hues 32%	**Affordable: / budget** 1 Bold & vibrant hues 55% 2 Monochrome 38% 3 Achromatic hues 35%	**Affordable: / budget** 1 Bold & vibrant hues 61% 2 Monochrome 43% 3 Achromatic hues 29%	**Affordable: / budget** 1 Bold & vibrant hues 51% 2 Monochrome 43% 3 Earthy tones 42%	**Affordable: / budget** 1 Bold & vibrant hues 42% 2 Monochrome 37% 3 Achromatic hues 32%
Mid-market 1 Achromatic hues 68% 2 Metallics 62% 3 Earthy tones 59%	**Mid-market** 1 Earthy tones 63% 2 Metallics 55% 3 Achromatic hues 47%	**Mid-market** 1 Earthy tones 61% 2 Achromatic hues 50% 3 Monochrome 46%	**Mid-market** 1 Achromatic hues 57% 2 Monochrome 54% 3 Metallics 49%	**Mid-market** 1 Metallics 55% 2 Achromatic hues 53% 3 Bold & vibrant hues 53%
Luxury / premium 1 Metallics 66% 2 Earthy tones 62% 3 Monochrome 62%	**Luxury / premium** 1 Earthy tones 63% 2 Metallics 56% 3 Monochrome 53%	**Luxury / premium** 1 Metallics 62% 2 Achromatic hues 50% 3 Monochrome 46%	**Luxury / premium** 1 Metallics 69% 2 Achromatic hues 51% 3 Earthy tones 45%	**Luxury / premium** 1 Earthy tones 58% 2 Metallics 50% 3 Monochrome 47%

COLOUR TRENDS - GLOBAL

Q4. What will be the dominant EXTERIOR COLOUR PALETTES in the following REGIONS in 2025?



Metallics for North America exteriors

In **North America**, the top exterior colour palettes were **Metallics (50%)**, followed by **Earthy Tones (44%)**, **Achromatic hues (41%)**, and **Monochrome (38%).**

Earthy tones for Europe exteriors

In **Europe**, the leading colour palettes were **Earthy Tones (57%),** followed by **Achromatic hues (54%), Metallics (44%)**, and **Monochrome (44%)**, and **Bold primary colours (42%).**

Metallics for China exteriors

For **China**, the leading colour palette was **Metallics (56%),** followed by **Bold primary colours (45%), Monochrome (37%)**, and **Achromatic hues (36%).** The least popular colour palette was **Earthy Tones (25%).**

Monochrome for Japan exteriors

For **Japan**, the leading colour palette was jointly in 1st place **Monochrome (37%)**, and **Achromatic hues (37%)**, and followed by **Metallics**, and **Earthy tones (25%).**

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COLOUR TRENDS - VARIANCES

Q4. What will be the dominant EXTERIOR COLOUR PALETTES in the following REGIONS in 2025?

By design role:

In **North America, Metallics** appeared to be a strong theme across most of the design roles**.**

For Europe, Earthy tones and **Achromatic hues** feature in the top 3 across almost all of the design roles.

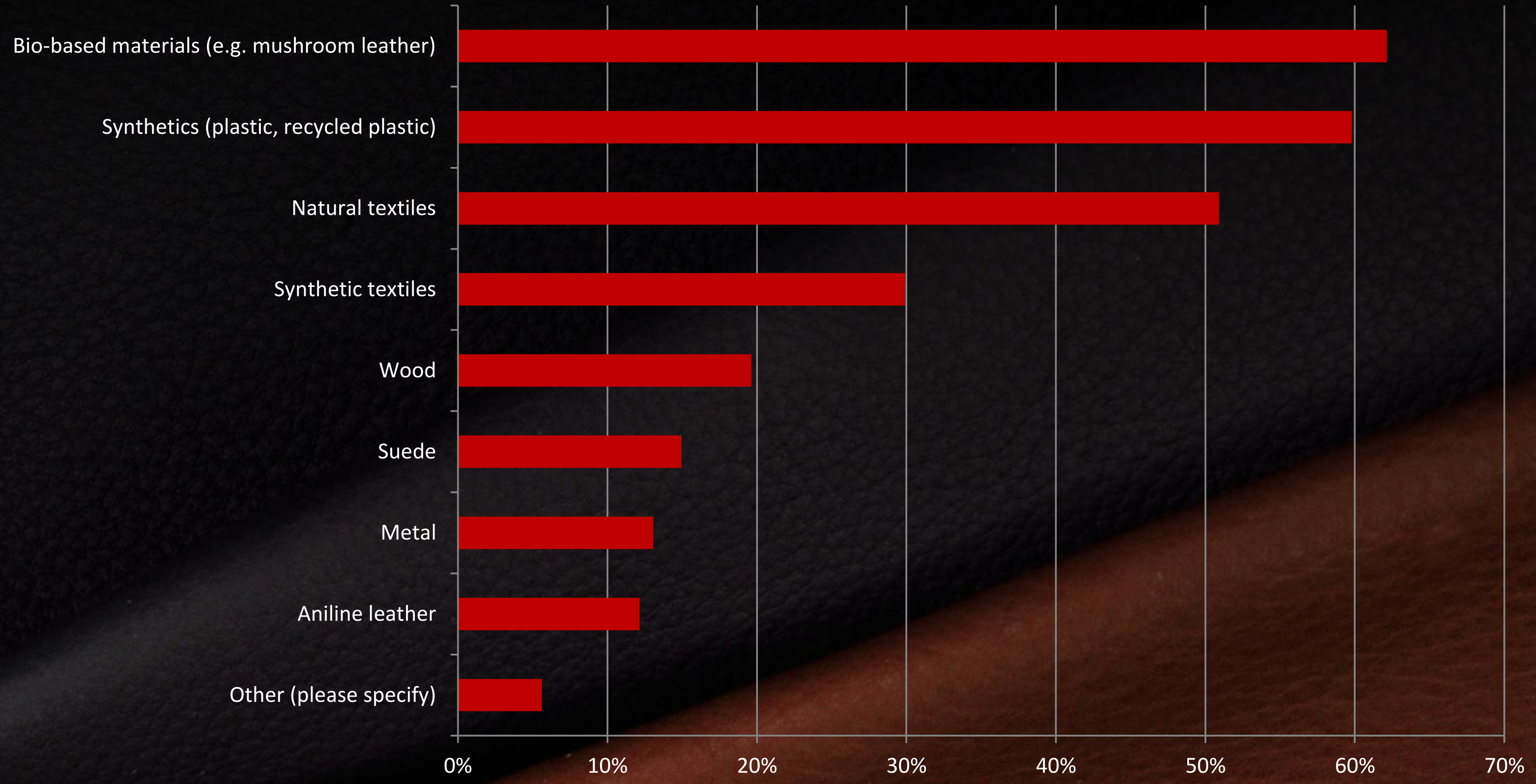
Within **China**, **Metallics** dominate across all of the design roles, followed closely by **Monochrome.**

In **Japan**, palettes were more balanced and varied by design role, albeit with **Metallics** and **Monochrome** scoring highly across all design roles.

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
North America 1 Metallics 52% 2 Earthy tones 48% 3 Achromatic hues 48% **Europe** 1 Achromatic hues 61% 2 Earthy tones 52% 3 Monochrome 48% **China** 1 Metallics 56% 2 Achromatic hues 43% 3 Monochrome 40% **Japan** 1 Metallics 40% 2 Monochrome 40% 3 Achromatic hues 30%	**North America** 1 Metallics 47% 2 Monochrome 42% 3 Earthy tones 41% **Europe** 1 Earthy tones 65% 2 Monochrome 56% 3 Achromatic hues 53% **China** 1 Metallics 55% 2 Bold primary colours 53% 3 Monochrome 28% **Japan** 1 Metallics 38% 2 Achromatic hues 37% 3 Monochrome 30%	**North America** 1 Metallics 43% 2 Earthy tones 39% 3 Achromatic hues 34% **Europe** 1 Earthy tones 64% 2 Achromatic hues 45% 3 Monochrome 40% **China** 1 Metallics 53% 2 Bold primary colours 48% 3 Monochrome 43% **Japan** 1 Achromatic hues 34% 2 Monochrome 30% 3 Bold primary colours 28%	**North America** 1 Metallics 60% 2 Achromatic hues 55% 3 Earthy tones 48% **Europe** 1 Achromatic hues 55% 2 Metallics 50% 3 Earthy tones 48% **China** 1 Metallics 53% 2 Monochrome 50% 3 Bold primary colours 47% **Japan** 1 Monochrome 50% 2 Achromatic hues 45% 3 Earthy tones 35%	**North America** 1 Earthy tones 47% 2 Achromatic hues 41% 3 Metallics 37% **Europe** 1 Bold primary colours 63% 2 Metallics 42% 3 Achromatic hues 35% **China** 1 Metallics 53% 2 Earthy tones 53% 3 Monochrome 42% **Japan** 1 Monochrome 37% 2 Earthy tones 26% 3 Bold primary colours 25%

MATERIAL TRENDS - GLOBAL

Q5. Which INTERIOR MATERIALS will become more PROMINENT in 2025?



Bio-based materials and Synthetics dominate interior materials

Moving onto material trends, three materials dominated the survey findings, namely **Bio-based materials (e.g. mushroom leather) (62%)** and **Synthetics (plastics, recycled plastic)** scoring **(60%),** and **Natural textiles (51%).**

In a distant 4th place was **Synthetic textiles (30%).**

Beyond those leading materials, there was an array of less prominent materials including **Wood (19%), Suede (15%), Metal (13%),** and **Aniline leather (12%).**

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MATERIAL TRENDS - VARIANCES

Q5. Which INTERIOR MATERIALS will become more PROMINENT in 2025?

Top 3 materials by region:

The same three materials - **Synthetics, Bio-based materials,** and **Natural textiles** form the top 3 materials in all regions, albeit in slightly different orders. However, notably in **Japan**, **Synthetics** are much more dominant than in other regions.

Europe	North America	China	Japan	Other
1 Synthetics 63%	1 Bio-based materials 69%	1 Bio-based materials 53%	1 Synthetics 100%	1 Bio-based materials 69%
2 Bio-based materials 60%	2 Synthetics 59%	2 Synthetics 47%	2 Bio-based materials 50%	2 Synthetics 58%
3 Natural textiles 55%	3 Natural textiles 44%	3 Natural textiles 42%	3 Natural textiles 50%	3 Natural textiles 58%

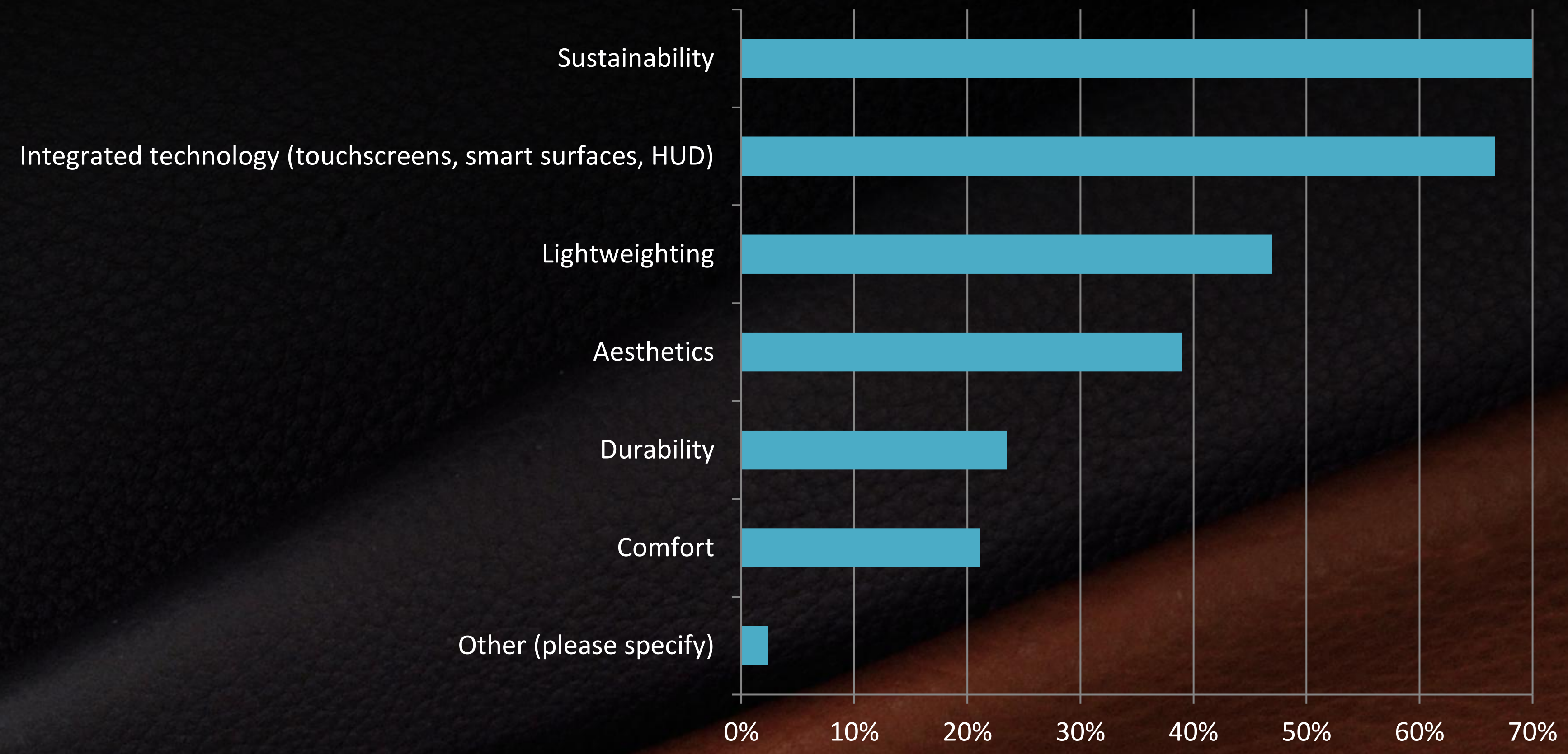
Top 3 materials by design role:

Once again, the same three materials - **Synthetics, Bio-based materials,** and **Natural textiles** form the top 3 materials in all design roles, albeit in slightly different orders. However, in all cases, the preferences are quite evenly balanced with no dominant material.

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
1 Synthetics 64%	1 Bio-based materials 71%	1 Synthetics 59%	1 Synthetics 62%	1 Synthetics 53%
2 Natural textiles 64%	2 Synthetics 67%	2 Bio-based materials 50%	2 Bio-based materials 62%	2 Synthetic textiles 41%
3 Bio-based materials 50%	3 Natural textiles 56%	3 Natural textiles 47%	3 Natural textiles 53%	3 Bio-based materials 35%

MATERIAL TRENDS - GLOBAL

Q6. In which area do you expect to see MATERIALS INNOVATION?



Sustainability & Integrated technology dominate

Within the area of materials innovation, the leading response was **Sustainability (70%),** followed by **Integrated technology (touchscreens, smart surfaces, HUD) (67%).**

In third place was **Lightweighting (47%),** followed in fourth place by **Aesthetics (39%).**

Notably the least innovation was expected with **Durability (23%),** and **Comfort (21%).**

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MATERIAL TRENDS - VARIANCES

Q6. In which area do you expect to see MATERIALS INNOVATION?

Top 3 materials innovations by region:

Sustainability, Integrated technology and **lightweighting** are the top 3 issues in all regions, albeit in slightly different orders.
Sustainability leads in **Europe, North America**, and **Japan**. However, **Integrated technology** is notably more prominent in **China.**

Europe	North America	China	Japan	Other
1 Sustainability 78%	1 Sustainability 64%	1 Integrated technology 68%	1 Sustainability 100%	1 Sustainability 77%
2 Integrated technology 66%	2 Integrated technology 64%	2 Sustainability 45%	2 Integrated technology 100%	2 Integrated technology 67%
3 Lightweighting 49%	3 Lightweighting 49%	3 Lightweighting 42%	3 Lightweighting 25%	3 Lightweighting 44%

Top 3 materials innovations by design role:

Sustainability, Integrated technology and **lightweighting** are the top 3 issues for almost all design roles, albeit in a slightly different order.
Integrated technology leads among **OEM department head** and T**ier supplier designer.** However, **Sustainability** leads in **OEM mid-level**, and **Independent designers.**

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
1 Integrated technology 86%	1 Sustainability 80%	1 Integrated technology 62%	1 Sustainability 71%	1 Sustainability 53%
2 Sustainability 71%	2 Integrated technology 71%	2 Sustainability 62%	2 Integrated technology 62%	2 Integrated technology 53%
3 Lightweighting 46%	3 Lightweighting 39%	3 Lightweighting 53%	3 Lightweighting 56%	3 Aesthetics 47%

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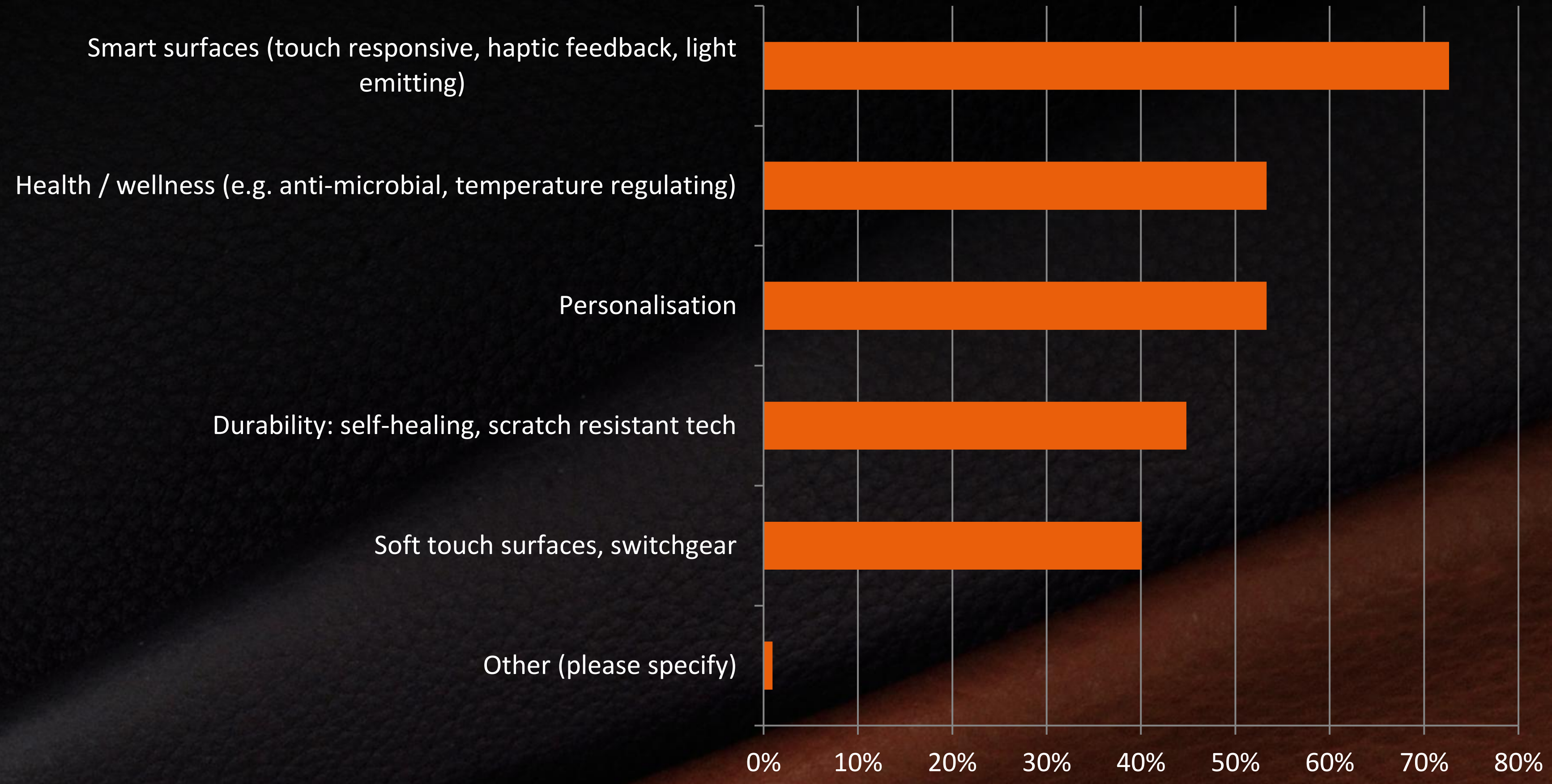
FINISH TRENDS - GLOBAL

Q7. For VEHICLE INTERIORS, what will be the main FINISH trends?



Smart surfaces dominate

Progressing onto finish trends for vehicle interiors, the major trend was clearly identified as **Smart surfaces (touch responsive, haptic feedback, light emitting) (73%).**

However, in a relatively distant joint 2nd place were a wider range of equally important finish trends including **Health / wellness (e.g. anti-microbial, temperature regulating) (53%),** and **Personalisation (53%).**

This was followed by **Durability (self-healing, scratch resistant tech) (45%),** and **Soft touch surfaces, switchgear (40%).**

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FINISH TRENDS - VARIANCES

Q7. For VEHICLE INTERIORS, what will be the main FINISH trends?

Top 3 finish trends by region:

Smart surfaces dominated in **Europe, North America** and **Japan**, whilst **Health / wellness** leads in **China**.

Europe	North America	China	Japan	Other
1 Smart surfaces 75% 2 Health / wellness 51% 3 Durability 50%	1 Smart surfaces 74% 2 Personalisation 74% 3 Soft touch surfaces 44%	1 Health / wellness 76% 2 Smart surfaces 58% 3 Personalisation 39%	1 Smart surfaces 100% 2 Durability 75% 3 Personalisation 50%	1 Smart surfaces 75% 2 Soft touch surfaces 61% 3 Health / wellness 53%

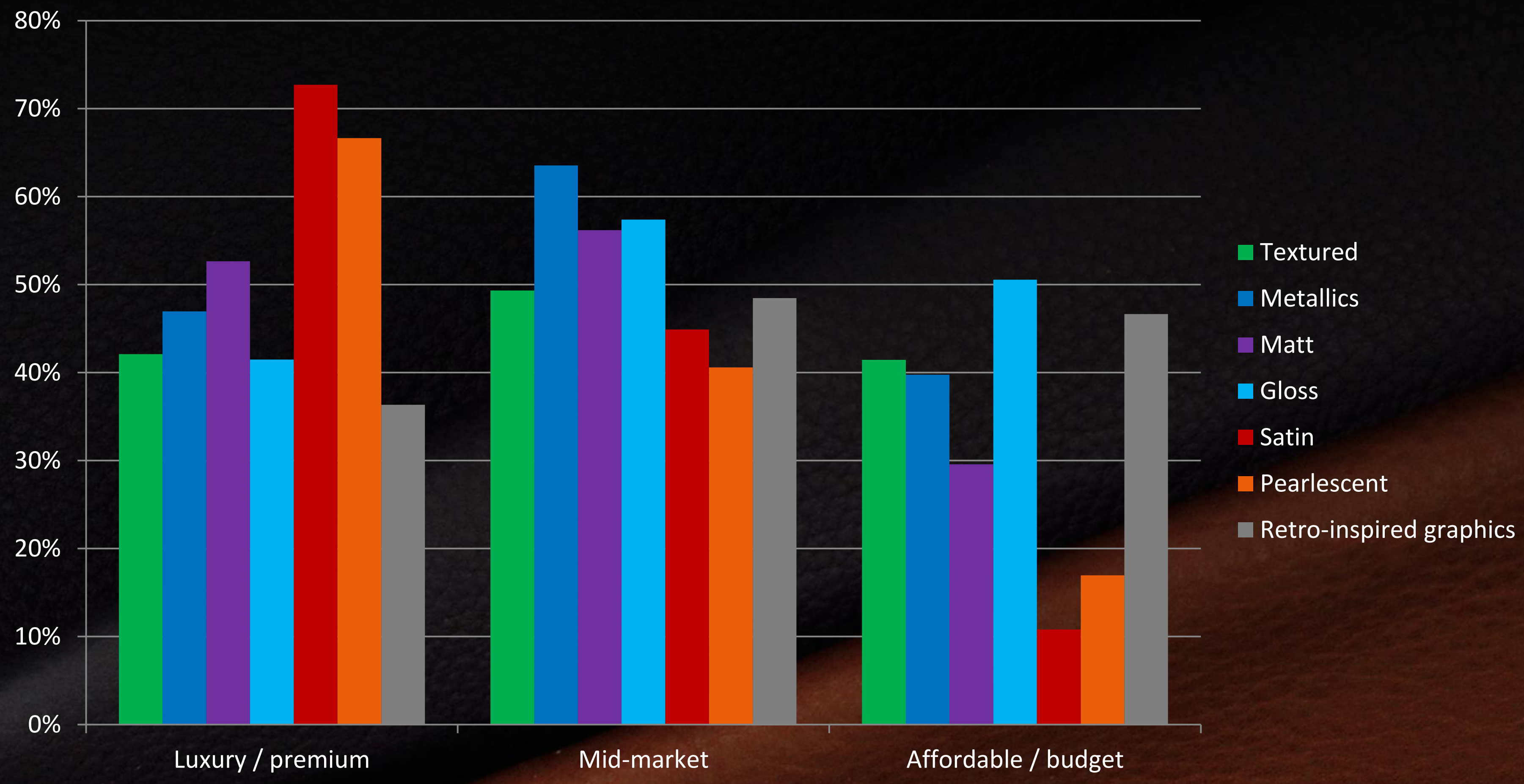
Top 3 finish trends design role:

Smart surfaces dominated across almost all design roles, with **Health / wellness** and **Personalisation**, in a strong second or third place in most design roles.

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
1 Smart surfaces 86% 2 Health / wellness 64% 3 Personalisation 54%	1 Smart surfaces 73% 2 Health / wellness 57% 3 Durability 47%	1 Smart surfaces 68% 2 Personalisation 58% 3 Health / wellness 50%	1 Smart surfaces 74% 2 Personalisation 62% 3 Durability 50%	1 Soft touch surfaces 59% 2 Smart surfaces 53% 3 Health / wellness 47%

FINISH TRENDS - GLOBAL

Q8. For VEHICLE EXTERIORS what will be the dominant FINISHES?



Gloss for Affordable / budget exteriors

For the **Affordable / budget** segment, the leading finish trend for vehicle exteriors was **Gloss (51%),** followed by **Retro-inspired graphics (47%), Textured (42%), Metallics (40%), and Matt (30%).** Finish trends that were less popular in the affordable / budget segment were **Pearlescent (17%),** and **Satin (11%).**

Metallics for Mid-market exteriors

Within the **Mid-marke**t segment, the most popular finish for vehicle exteriors was **Metallics (64%),** followed by **Gloss (57%), Matt (56%), Textured (49%), Retro-inspired graphics (48%),** and **Satin (45%),** and **Pearlescent (40%).**

Satin for Luxury / premium exteriors

For the **Luxury / premium** segment, the dominant finishes for vehicle exteriors selected were **Satin (73%),** followed by **Pearlescent (67%).** In the second tier of results stood **Matt (53%), Metallics (47%), Textured (42%),** and **Gloss (41%).**

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FINISH TRENDS - VARIANCES

Q8. For VEHICLE EXTERIORS what will be the dominant FINISHES?

Top 3 finishes by region:

In the **Affordable / budget** segment, **Gloss** followed by **Textured** were the leading finishes across most regions, except for **Japan,** which favoured **Textured** and **Retro-inspired graphics.**

In the **Mid-market**, **Metallics** were the leading finish in most regions except for **Japan**, which favoured **Matt** and **Retro-inspired graphics.**

In the **Luxury / premium** segment, **Satin** marginally led the finishes for most regions, except for **Japan,** which preferred **Metallics.**

Europe	North America	China	Japan	Other
Affordable: / budget 1 Gloss 54% 2 Textured 45% 3 Retro-inspired graphics 49%	**Affordable: / budget** 1 Gloss 69% 2 Textured 52% 3 Metallic 45%	**Affordable: / budget** 1 Gloss 34% 2 Textured 32% 3 Metallics 26%	**Affordable: / budget** 1 Textured 75% 2 Retro-inspired graphics 75% 3 Matt 67%	**Affordable: / budget** 1 Metallics 63% 2 Retro-inspired graphics 54% 3 Gloss 48%
Mid-market 1 Metallics 62% 2 Matt 58% 3 Gloss 57%	**Mid-market** 1 Metallics 72% 2 Gloss 62% 3 Textured 48%	**Mid-market** 1 Metallics 71% 2 Pearlescent 61% 3 Gloss 49%	**Mid-market** 1 Matt 100% 2 Retro-inspired graphics 100% 3 Gloss 75%	**Mid-market** 1 Matt 64% 2 Textured 63% 3 Gloss 61%
Luxury / premium 1 Satin 76% 2 Pearlescent 70% 3 Metallics 54%	**Luxury / premium** 1 Satin 85% 2 Pearlescent 77% 3 Matt 73%	**Luxury / premium** 1 Satin 63% 2 Matt 54% 3 Textured 50%	**Luxury / premium** 1 Metallics 100% 2 Pearlescent 75% 3 Gloss 75%	**Luxury / premium** 1 Pearlescent 77% 2 Satin 67% 3 Matt 54%

FINISH TRENDS - VARIANCES

Q8. For VEHICLE EXTERIORS what will be the dominant FINISHES?

Top 3 finishes by design role:

Within the **Affordable / budget** segment, **Gloss** was the leading finish across most design roles, with only **OEM-mid-level** designers and **Design students** slightly favouring **Texture** more. But for all intents and purposes, **Gloss** dominated.

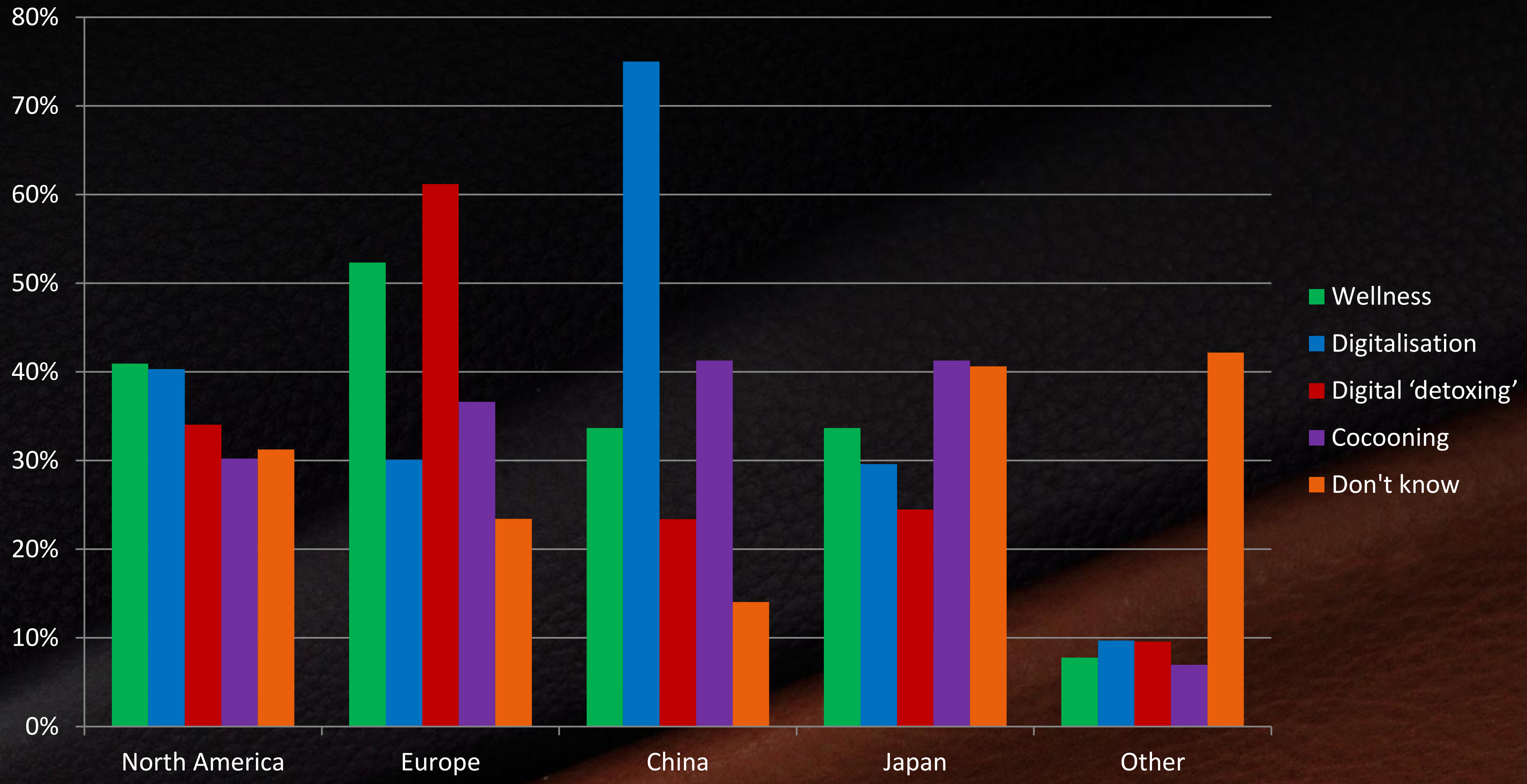
In the **Mid-market** segment, **Metallics** was marginally the leading finish across most design roles, except for **OEM-mid-level** which favoured **Retro-inspired graphics, Matt,** and **Satin** more.

In the **Luxury / premium** segment, **Satin** marginally led the finishes for across design roles, except for **Independent designers,** which only marginally preferred **Matt.**

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
Affordable: / budget 1 Gloss 70% 2 Retro-inspired graphics 55% 3 Metallics 44%	Affordable: / budget 1 Textured 56% 2 Gloss 55% 3 Retro-inspired graphics 41%	Affordable: / budget 1 Gloss 43% 2 Retro-inspired graphics 42% 3 Metallics 39%	Affordable: / budget 1 Gloss 52% 2 Metallics 41% 3 Textured 36%	Affordable: / budget 1 Textured 35% 2 Matt 31% 3 Gloss 25%
Mid-market 1 Metallics 64% 2 Matt 60% 3 Satin 55%	Mid-market 1 Retro-inspired graphics 59% 2 Matt 56% 3 Satin 56%	Mid-market 1 Metallics 61% 2 Gloss 57% 3 Matt 56%	Mid-market 1 Metallics 59% 2 Matt 54% 3 Satin 53%	Mid-market 1 Metallics 88% 2 Textured 59% 3 Gloss 56%
Luxury / premium 1 Satin 77% 2 Pearlescent 76% 3 Metallics 56%	Luxury / premium 1 Satin 76% 2 Pearlescent 70% 3 Metallics 52%	Luxury / premium 1 Satin 84% 2 Pearlescent 71% 3 Matt 60%	Luxury / premium 1 Matt 62% 2 Satin 61% 3 Textured 55%	Luxury / premium 1 Satin 65% 2 Textured 53% 3 Pearlescent 50%

CULTURAL AND CONSUMER INFLUENCES - GLOBAL

Q9. Which societal trends will most influence INTERIOR CMF choices by REGION?



North America has a balanced, wide ranges of influences

Within **North America**, the leading societal trend for interior CMF was **Wellness (41%),** followed very closely by **Digitalisation (40%), Digital ‘detoxing’ (34%),** and **Cocooning (30%).**

Europe led by digital detoxing & wellness

For **Europe**, the leading interior CMF influence was **Digital ‘detoxing’ (62%),** followed by **Wellness (53%), Cocooning (37%),** and **Digitalisation (30%).**

China dominated by digitalisation

Within **China**, the dominant interior CMF influence was **Digitalisation (76%).** In a distant 2nd place were **Cocooning (41%),** followed by **Wellness (34%),** and **Digital ‘detoxing’ (23%).**

Japan has a balance of influences

For **Japan**, **Cocooning (41%)** led followed by **Wellness (34%), Digitalisation (30%),** and **Digital ‘detoxing’ (25%).**

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CULTURAL AND CONSUMER INFLUENCES - VARIANCES

Q9. Which societal trends will most influence INTERIOR CMF choices by REGION?

Top 3 by design role:

In **North America, Digital 'detoxing'** led with **OEM designers.** However, **Wellness** led for **Tier supplier designers** and **Independent designers.**

For **Europe, Wellness** led for **OEM department heads**, and **Tier supplier designers**. However, **Digital 'detoxing'** led with **Tier supplier designers** and **Independent designers.**

Within **China**, **Digitalisation** led across all design roles, followed by **Cocooning** across most roles.

In **Japan**, **Cocooning** was the leading influence across most roles, with the exception of **OEM mid-level.**

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
North America	**North America**	**North America**	**North America**	**North America**
1 Digitalisation 30%	1 Digital 'detoxing' 52%	1 Wellness 40%	1 Wellness 45%	1 Cocooning 41%
2 Digital 'detoxing' 27%	2 Digitalisation 51%	2 Digitalisation 30%	2 Digitalisation 42%	2 Digital 'detoxing' 38%
3 Wellness 27%	3 Wellness 43%	3 Cocooning 28%	3 Digital 'detoxing' 31%	3 Digitalisation 35%
Europe	**Europe**	**Europe**	**Europe**	**Europe**
1 Wellness 62%	1 Digital 'detoxing' 71%	1 Wellness 70%	1 Digital 'detoxing' 55%	1 Wellness 71%
2 Digitalisation 41%	2 Wellness 57%	2 Digital 'detoxing' 69%	2 Wellness 38%	2 Digital 'detoxing' 56%
3 Digital 'detoxing' 38%	3 Cocooning 41%	3 Cocooning 40%	3 Cocooning 36%	2 Digitalisation 41%
China	**China**	**China**	**China**	**China**
1 Digitalisation 63%	1 Digitalisation 83%	1 Digitalisation 80%	1 Digitalisation 77%	1 Digitalisation 76%
2 Cocooning 44%	2 Wellness 43%	2 Cocooning 40%	2 Cocooning 43%	2 Cocooning 47%
3 Digital 'detoxing' 27%	3 Cocooning 40%	3 Wellness 20%	3 Wellness 35%	3 Digital 'detoxing' 44%
Japan	**Japan**	**Japan**	**Japan**	**Japan**
1 Cocooning 44%	1 Wellness 41%	1 Cocooning 40%	1 Cocooning 50%	1 Cocooning 53%
2 Wellness 27%	2 Digitalisation 30%	2 Digital 'detoxing' 34%	2 Wellness 38%	2 Wellness 29%
3 Digitalisation 26%	3 Cocooning 29%	3 Digitalisation 30%	3 Digital 'detoxing' 28%	3 Digitalisation 24%

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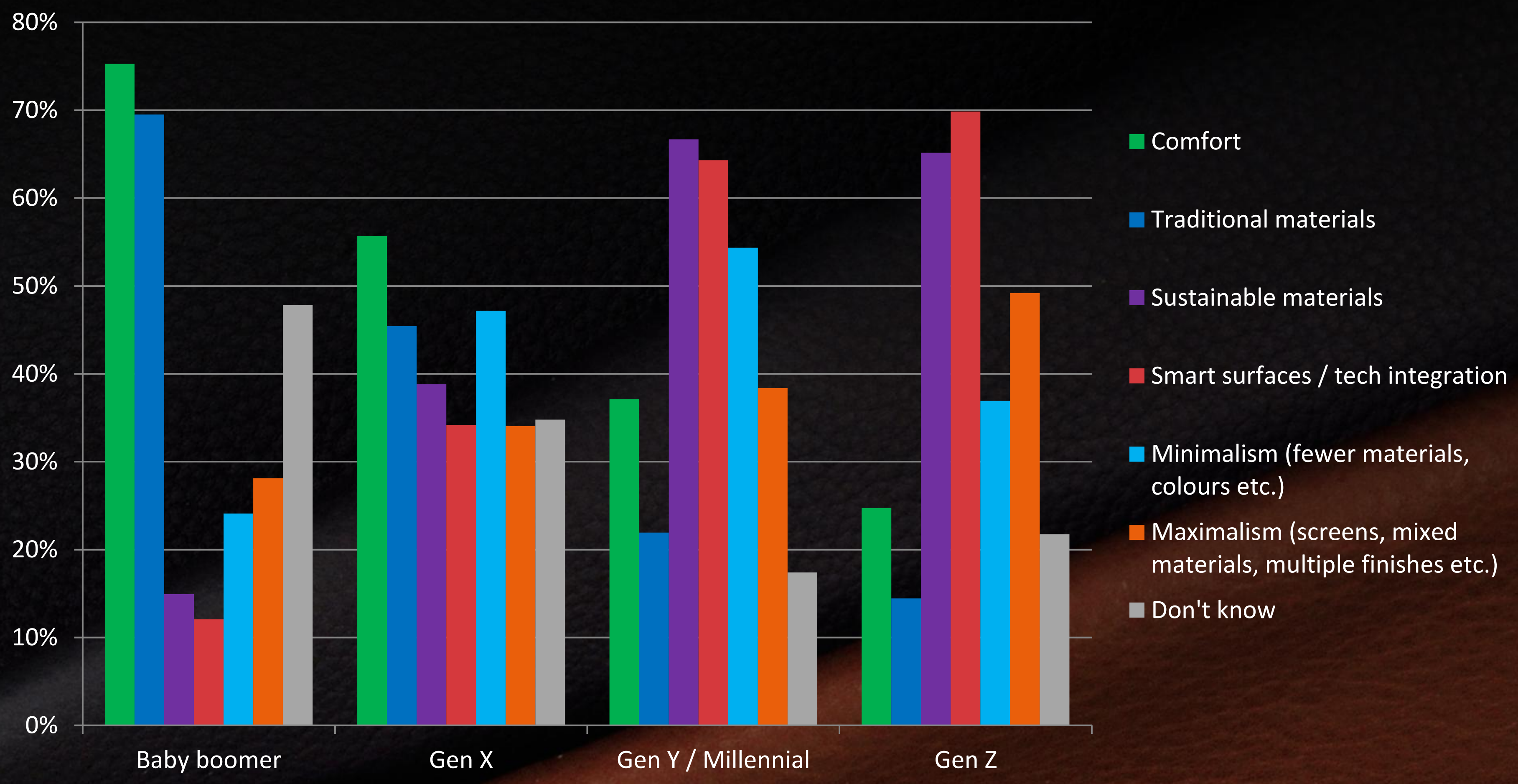
CULTURAL&CONSUMER INFLUENCES - GLOBAL

Q10. Which aspect of INTERIORS will the different GENERATIONS prioritise in 2025?



Baby boomers prioritised comfort

The **Baby boomers** prioritised **Comfort (76%),** and **Traditional Materials (71%),** but little interest in **Sustainable Materials (15%),** and **Smart Surfaces / Tech Integration (14%).**

Generation X had a balance of priorities

For **Gen X**, they prioritised **Comfort (55%), Minimalism (49%), Traditional Materials (44%), Sustainable Materials (38%), Smart Surfaces / Tech Integration (35%),** and **Maximalism (32%).**

Millennials prioritised sustainability and smart surfaces

For **Gen Y / Millennials**, there was a strong bias towards **Sustainable Materials (67%),** and **Smart Surfaces / Tech Integration (65%),** whilst **Comfort (34%), and Traditional Materials (19%)** scored relatively low.

Generation Z focused on smart surfaces and sustainability

For **Gen Z**, they scored highly for **Smart Surfaces / Tech Integration (70%),** and **Sustainable Materials (67%).**

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CULTURAL AND CONSUMER INFLUENCES - VARIANCES

Q10. Which aspect of INTERIORS will the different GENERATIONS prioritise in 2025?

Top 3 by region:

Baby boomers strongly favoured **Comfort** and **Traditional materials** across all regions, illustrating a clearcut generational divide.

Generation X favoured **Comfort** and **Traditional materials** , across most key regions, except **Japan**, albeit not as strongly as **Baby boomers.**

Gen Y / Millennials exhibited a clear preference for **Smart surfaces** and **Sustainable materials**, across most regions.

Gen Z displayed an even clearer preference for **Smart surfaces** and **Sustainable materials**, except in **Japan**, reinforcing the generational divide.

Europe	North America	China	Japan	Other
Baby boomer	**Baby boomer**	**Baby boomer**	**Baby boomer**	**Baby boomer**
1 Traditional materials 80%	1 Comfort 86%	1 Comfort 53%	1 Comfort 50%	1 Comfort 82%
2 Comfort 78%	2 Traditional materials 74%	2 Traditional materials 39%	2 Traditional materials 50%	2 Traditional materials 74%
3 Maximalism 28%	3 Minimalism 39%	3 Maximalism 37%	3 Maximalism 50%	3 Maximalism 32%
Generation X	**Generation X**	**Generation X**	**Generation X**	**Generation X**
1 Comfort 52%	1 Comfort 65%	1 Comfort 58%	1 Sustainable materials 75%	1 Comfort 55%
2 Minimalism 51%	2 Maximalism 52%	2 Traditional materials 50%	2 Maximalism 75%	2 Maximalism 55%
3 Traditional materials 42%	3 Traditional materials 50%	3 Smart surfaces 41%	3 Minimalism 67%	3 Sustainable materials 51%
Gen Y / Millennial	**Gen Y / Millennial**	**Gen Y / Millennial**	**Gen Y / Millennial**	**Gen Y / Millennial**
1 Sustainable materials 75%	1 Smart surfaces 69%	1 Comfort 56%	1 Smart surfaces 100%	1 Smart surfaces 77%
2 Smart surfaces 64%	2 Sustainable materials 68%	2 Sustainable materials 53%	2 Minimalism 67%	2 Sustainable materials 62%
3 Minimalism 53%	3 Minimalism 58%	3 Minimalism 53%	3 Sustainable materials 50%	3 Minimalism 55%
Gen Z	**Gen Z**	**Gen Z**	**Gen Z**	**Gen Z**
1 Smart surfaces 70%	1 Sustainable materials 76%	1 Smart surfaces 59%	1 Minimalism 100%	1 Smart surfaces 80%
2 Sustainable materials 69%	2 Smart surfaces 72%	2 Sustainable materials 45%	2 Comfort 100%	2 Sustainable materials 63%
3 Maximalism 53%	3 Maximalism 42%	3 Minimalism 45%	3 Sustainable materials 75%	3 Maximalism 61%

CULTURAL AND CONSUMER INFLUENCES - VARIANCES

Q10. Which aspect of INTERIORS will the different GENERATIONS prioritise in 2025?

Top 3 by design role:

Baby boomers strongly favoured **Comfort** and **Traditional materials** across all design roles, confirming the clear generational divide.

Generation X also favoured **Comfort** and **Traditional materials**, across most design roles,, albeit not as strongly as **Baby boomers.**

Gen Y / Millennials exhibited a clear preference for **Smart surfaces** and **Sustainable materials** across all design roles.

Gen Z displayed a clearer preference for **Smart surfaces** and **Sustainable materials** across all design roles, reinforcing the generational divide.

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
Baby boomer	**Baby boomer**	**Baby boomer**	**Baby boomer**	**Baby boomer**
1 Comfort 70%	1 Comfort 80%	1 Traditional materials 75%	1 Comfort 76%	1 Comfort 53%
2 Traditional materials 65%	2 Traditional materials 73%	2 Comfort 66%	2 Traditional materials 62%	2 Traditional materials 41%
3 Minimalism 27%	3 Maximalism 33%	3 Maximalism 24%	3 Maximalism 41%	3 Sustainable materials 24%
Generation X	**Generation X**	**Generation X**	**Generation X**	**Generation X**
1 Comfort 67%	1 Comfort 59%	1 Comfort 52%	1 Comfort 69%	1 Traditional materials 71%
2 Sustainable materials 46%	2 Minimalism 53%	2 Minimalism 52%	2 Smart surfaces 50%	2 Comfort 53%
3 Minimalism 46%	3 Traditional materials 49%	3 Traditional materials 43%	3 Minimalism 44%	2 Minimalism 29%
Gen Y / Millennial	**Gen Y / Millennial**	**Gen Y / Millennial**	**Gen Y / Millennial**	**Gen Y / Millennial**
1 Smart surfaces 70%	1 Smart surfaces 69%	1 Smart surfaces 60%	1 Sustainable materials 78%	1 Sustainable materials 71%
2 Sustainable materials 57%	2 Sustainable materials 63%	2 Sustainable materials 58%	2 Smart surfaces 59%	2 Smart surfaces 53%
3 Minimalism 46%	3 Minimalism 60%	3 Minimalism 52%	3 Minimalism 50%	3 Minimalism 53%
Gen Z	**Gen Z**	**Gen Z**	**Gen Z**	**Gen Z**
1 Smart surfaces 70%	1 Sustainable materials 73%	1 Smart surfaces 60%	1 Smart surfaces 72%	1 Smart surfaces 73%
2 Sustainable materials 54%	2 Smart surfaces 70%	2 Sustainable materials 58%	2 Sustainable materials 69%	2 Maximalism 65%
3 Maximalism 50%	3 Maximalism 49%	3 Minimalism 39%	3 Maximalism 48%	2 Sustainable materials 41%

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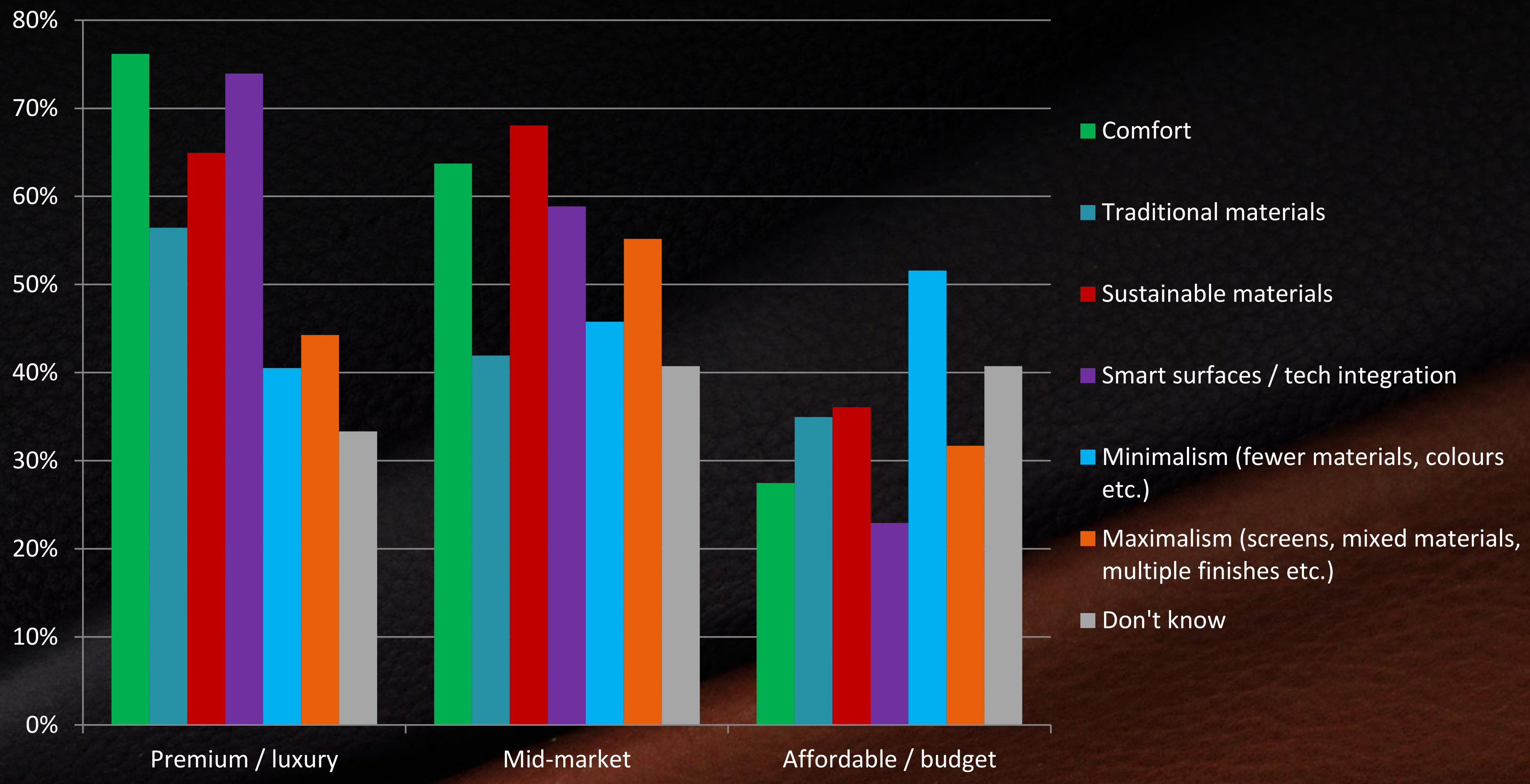
CULTURAL AND CONSUMER INFLUENCES - GLOBAL

Q11. Which aspect of CMF will be prioritised for each vehicle segment?



Affordable / budget prioritises minimalism

The **Affordable / budget** vehicle segment prioritised **Minimalism (52%)**, followed by **Sustainable Materials (36%), Traditional Materials (35%), Maximalism (32%), Comfort (27%),** and **Smart Surfaces (23%).**

Mid-market prioritises sustainability

Within the **Mid-market** vehicle segment, the leading response was **Sustainable Materials by (68%),** followed by **Comfort (64%), Smart Surfaces / Tech Integration (59%), Maximalism (55%), Minimalism (45%),** and **Traditional Materials (42%).**

Luxury / premium prioritises comfort & smart surfaces / tech integration

In the **Luxury / premium** segment, the priority was **Comfort (76%),** and **Smart Surfaces / Tech Integration (74%).** Less of a priority were **Sustainable Materials (65%), Traditional Materials (57%), Maximalism (44%),** and **Minimalism (40%).**

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CULTURAL AND CONSUMER INFLUENCES - VARIANCES

Q11. Which aspect of CMF will be prioritised for each vehicle segment?

Top 3 influences by region:

Within the **Affordable / budget** segment, **Minimalism** was the leading response across all regions.

In the **Mid-market** segment, **Sustainable materials** were the leading influences in **Europe** and **North America**. However, **Comfort**, followed by **Smart surfaces** were the leading influence in **China** and **Japan**, illustrating a clear East-West divide.

In the **Luxury / premium** segment, **Comfort** led in **Europe** and **North America.** However, **Sustainable materials** led in **China** and **Japan**, once again highlighting a clear East-West divide.

Europe	North America	China	Japan	Other
Affordable: / budget	**Affordable: / budget**	**Affordable: / budget**	**Affordable: / budget**	**Affordable: / budget**
1 Minimalism 52%	1 Minimalism 47%	1 Minimalism 51%	1 Minimalism 75%	1 Minimalism 50%
2 Sustainable materials 43%	2 Traditional materials 42%	2 Traditional materials 32%	2 Comfort 75%	2 Sustainable materials 44%
3 Maximalism 37%	3 Sustainable materials 34%	3 Smart surfaces 31%	3 Sustainable materials 50%	3 Traditional materials 42%
Mid-market	**Mid-market**	**Mid-market**	**Mid-market**	**Mid-market**
1 Sustainable materials 70%	1 Sustainable materials 66%	1 Comfort 68%	1 Comfort 75%	1 Sustainable materials 75%
2 Comfort 64%	2 Maximalism 65%	2 Smart surfaces / tech 66%	2 Smart surfaces / tech 75%	2 Smart surfaces / tech 65%
3 Smart surfaces / tech 58%	3 Comfort 58%	3 Sustainable materials 63%	3 Traditional materials 67%	3 Comfort 64%
Luxury / premium	**Luxury / premium**	**Luxury / premium**	**Luxury / premium**	**Luxury / premium**
1 Comfort 83%	1 Comfort 91%	1 Sustainable materials 55%	1 Sustainable materials 100%	1 Smart surfaces / tech 79%
2 Smart surfaces / tech 77%	2 Smart surfaces / tech 83%	2 Smart surfaces / tech 51%	2 Comfort 75%	2 Comfort 76%
3 Sustainable materials 69%	3 Traditional materials 61%	3 Maximalism 51%	3 Smart surfaces / tech 75%	3 Sustainable materials 75%

CULTURAL AND CONSUMER INFLUENCES - VARIANCES

Q11. Which aspect of CMF will be prioritised for each vehicle segment?

Top 3 influences by design role:

Within the **Affordable / budget** segment, **Minimalism** led for **OEM mid-level** and **Tier supplier designers,** but **OEM department heads** favoured **Maximalism.**

In the **Mid-market** segment, **Sustainable materials** were favoured by **OEM department heads,** whereas **Comfort** was favoured more by **Tier supplier designers** and **Independent designers.**

For the **Luxury / premium** segment, **Smart surfaces** were favoured by **OEM department heads, OEM mid-level** and **Tier supplier designers,** whereas **Comfort** was favoured more by **Independent designers.**

OEM department head	OEM mid-level	Tier supplier designer	Independent designer	Design student
Text **Affordable: / budget** 1 Maximalism 57% 2 Traditional materials 38% 3 Sustainable materials 37%	**Affordable: / budget** 1 Minimalism 64% 2 Traditional materials 48% 3 Maximalism 38%	**Affordable: / budget** 1 Minimalism 43% 2 Traditional materials 34% 3 Sustainable materials 31%	**Affordable: / budget** 1 Sustainable materials 50% 2 Minimalism 48% 3 Comfort 36%	**Affordable: / budget** 1 Minimalism 50% 2 Sustainable materials 41% 3 Traditional materials 38%
Mid-market 1 Sustainable materials 71% 2 Traditional materials 62% 3 Comfort 59%	**Mid-market** 1 Smart surfaces / tech 70% 2 Sustainable materials 67% 3 Comfort 65%	**Mid-market** 1 Comfort 70% 2 Sustainable materials 62% 3 Maximalism 60%	**Mid-market** 1 Comfort 75% 2 Sustainable materials 67% 3 Smart surfaces / tech 66%	**Mid-market** 1 Sustainable materials 76% 2 Maximalism 76% 3 Comfort 65%
Luxury / premium 1 Smart surfaces / tech 85% 2 Comfort 81% 3 Minimalism 60%	**Luxury / premium** 1 Smart surfaces / tech 80% 2 Comfort 78% 3 Sustainable materials 77%	**Luxury / premium** 1 Smart surfaces / tech 70% 2 Comfort 67% 3 Sustainable materials 62%	**Luxury / premium** 1 Comfort 71% 2 Smart surfaces / tech 62% 3 Traditional materials 57%	**Luxury / premium** 1 Comfort 65% 2 Traditional materials 56% 3 Smart surfaces / tech 50%

METHODOLOGY

Online survey

Promoted via a four-stage email campaign to the extensive car design news audience

...and social media channels

Questions designed to ensure the survey was open to as wide a group as possible

While seeking responses only from individuals qualified to answer

Questions designed to probe into the biggest issues affecting colour, materials and finish (CMF) in car design and therefore generate meaningful insights for companies in the sector

Results analysed for significant variances by design role and region

26,000 invitees

336 responses

1.3% response rate

5.3% margin of error

Margin of error
The margin of error on the survey results is 5.3%, at 95% confidence level. In other words, if we were to undertake the survey again, 95% of the time the response percentages reported would be within 5.3% of the percentages reported for this survey. The desirable margin of error is <6% at above 90% confidence, so we can consider this to be well within the desired margin of error, and therefore a robust survey with a representative audience sample.

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Colour, Materials & Finish (CMF) Survey 2025

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