Colour, Materials & Finish (CMF) Survey 2025

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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 -

- Earthy tones were the dominant colour trend for vehicle interiors
- Achromatic hues led the exterior colour trend, but results were more evenly balanced
- There were distinctly different colour preferences across the vehicle segments
- There were clear exterior colour palette preferences across the different regions

Material trends -

- Bio-based materials and Synthetics dominated interior materials
- Sustainability & Integrated technology dominated materials innovation

Finish trends -

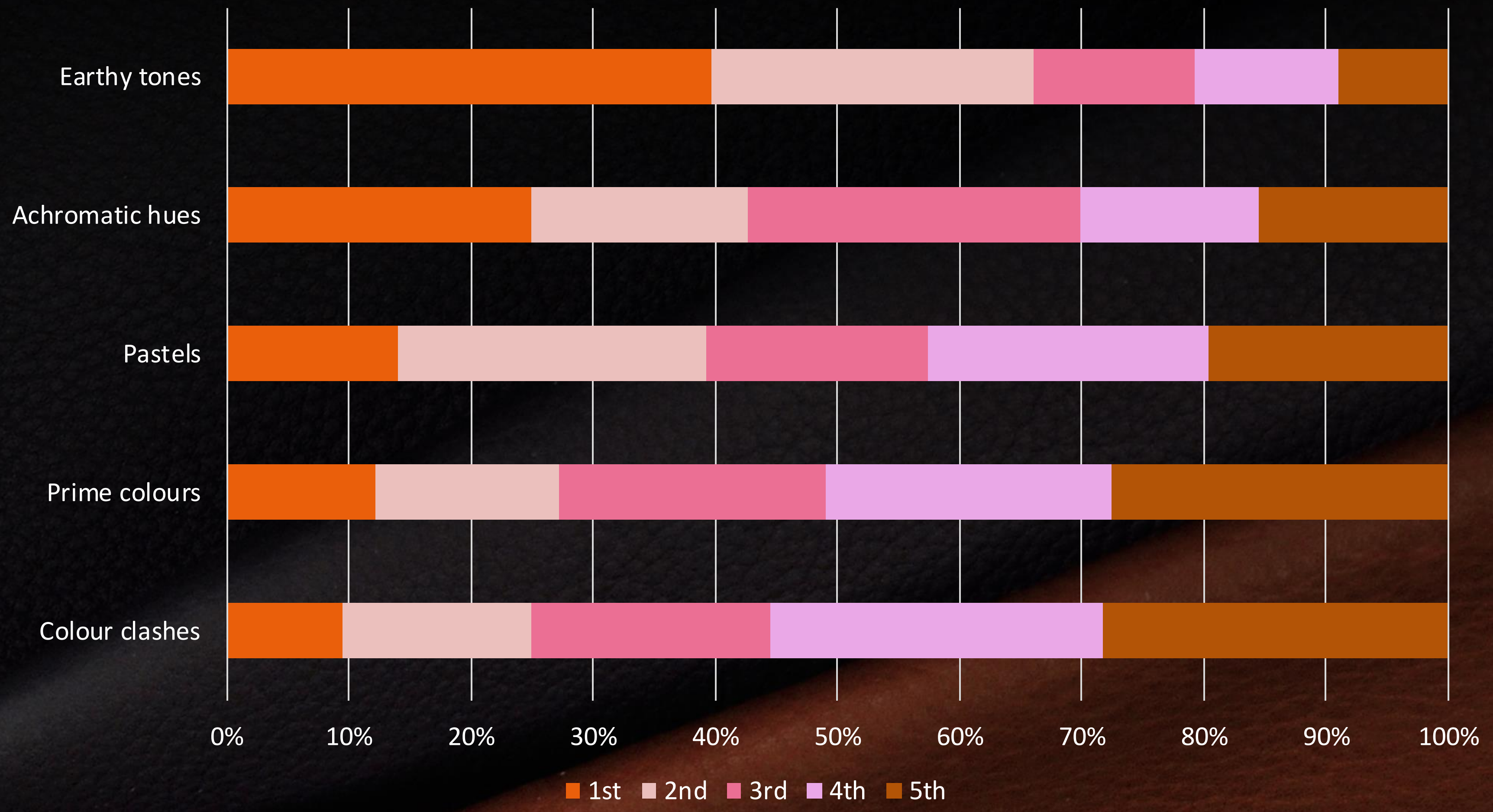
- Smart surfaces dominated vehicle interior finish trends
- There were notably different exterior finish preferences across the regions

Cultural and consumer influences -

- A range of different societal trends are influencing CMF choices by region
- There are clearcut generational differences within interior preferences
- Differing aspects of CMF are being prioritised according to vehicle segment

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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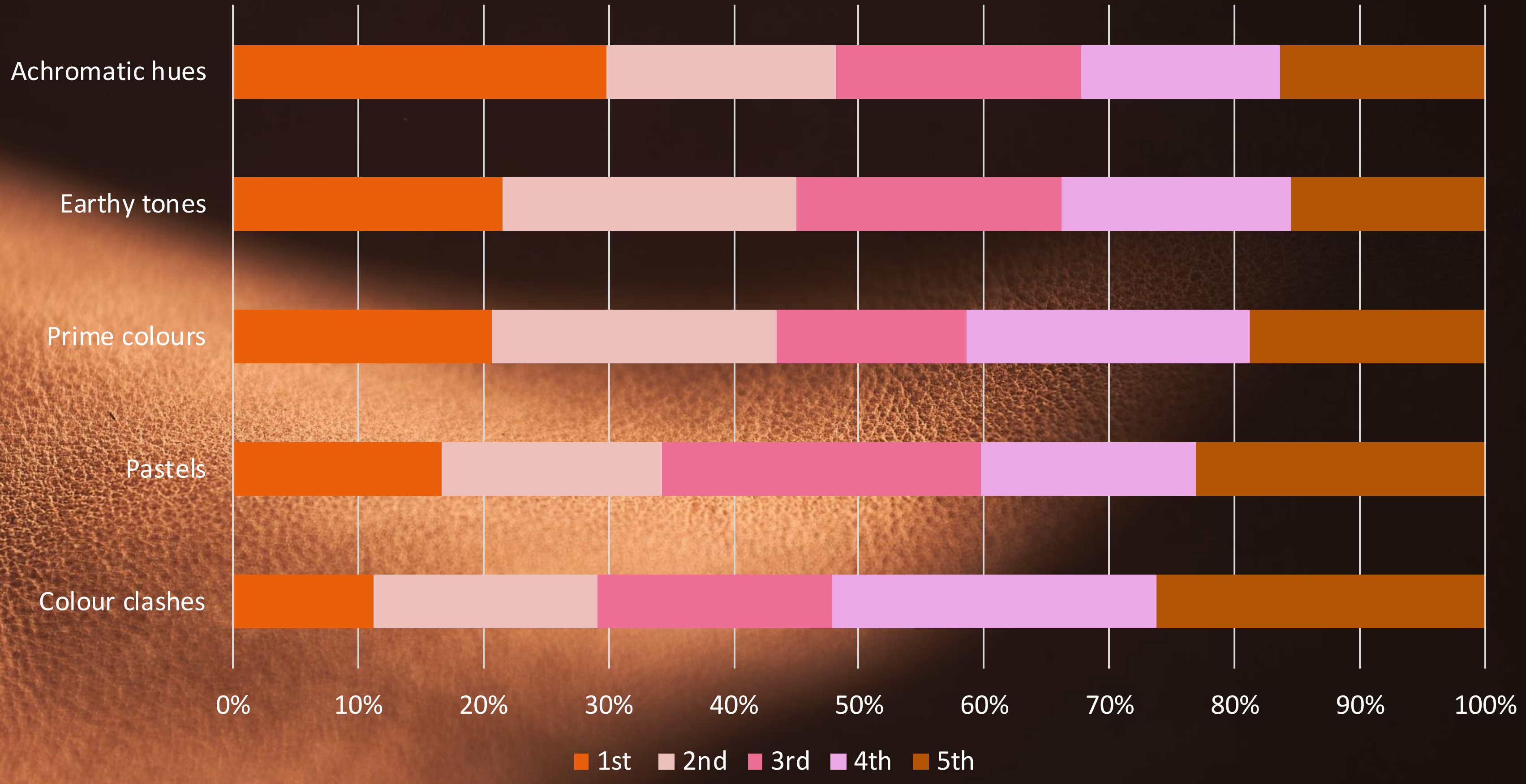
COLOUR TRENDS - GLOBAL

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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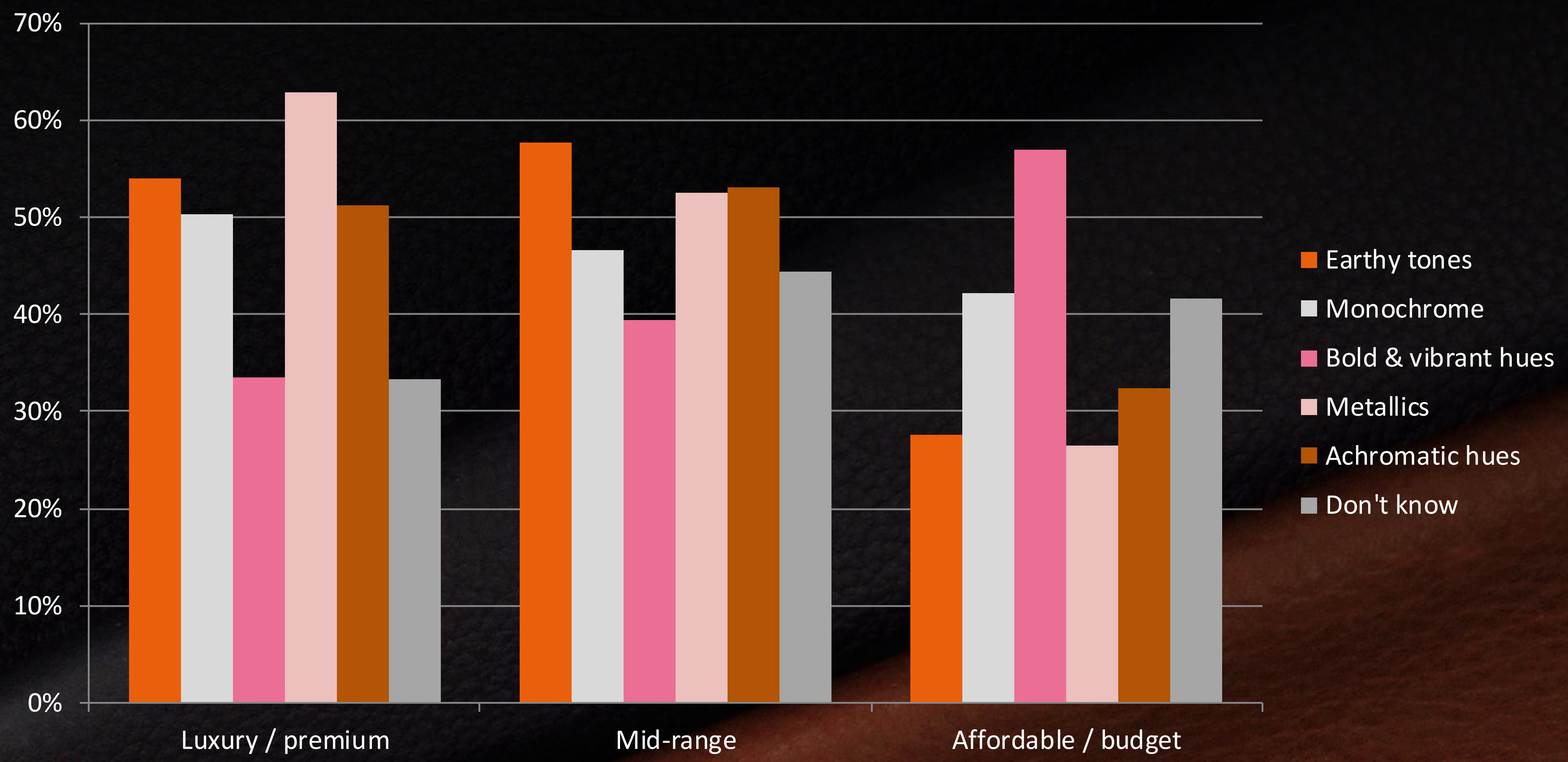
COLOUR TRENDS - GLOBAL

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



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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

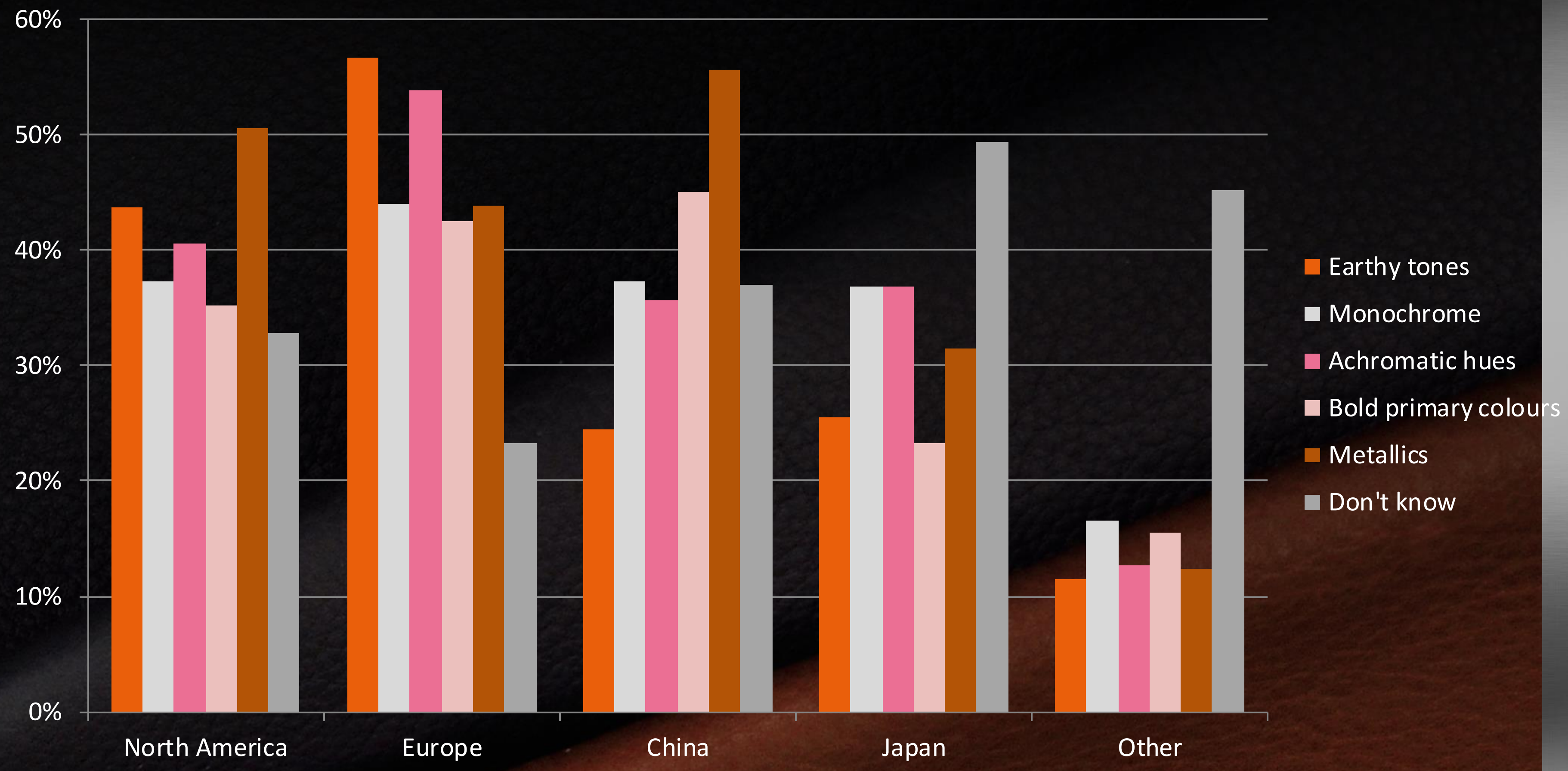
For the **Mid-market** vehicle segment, **Earthy Tones (58%)** were the leading colour theme, followed by **Achromatic hues (53%), Metallics (52%),** and **Monochrome (47%),** In last position was **Bold & vibrant hues (39%),** contrasting with the **Affordable / budget** segment.

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%).**

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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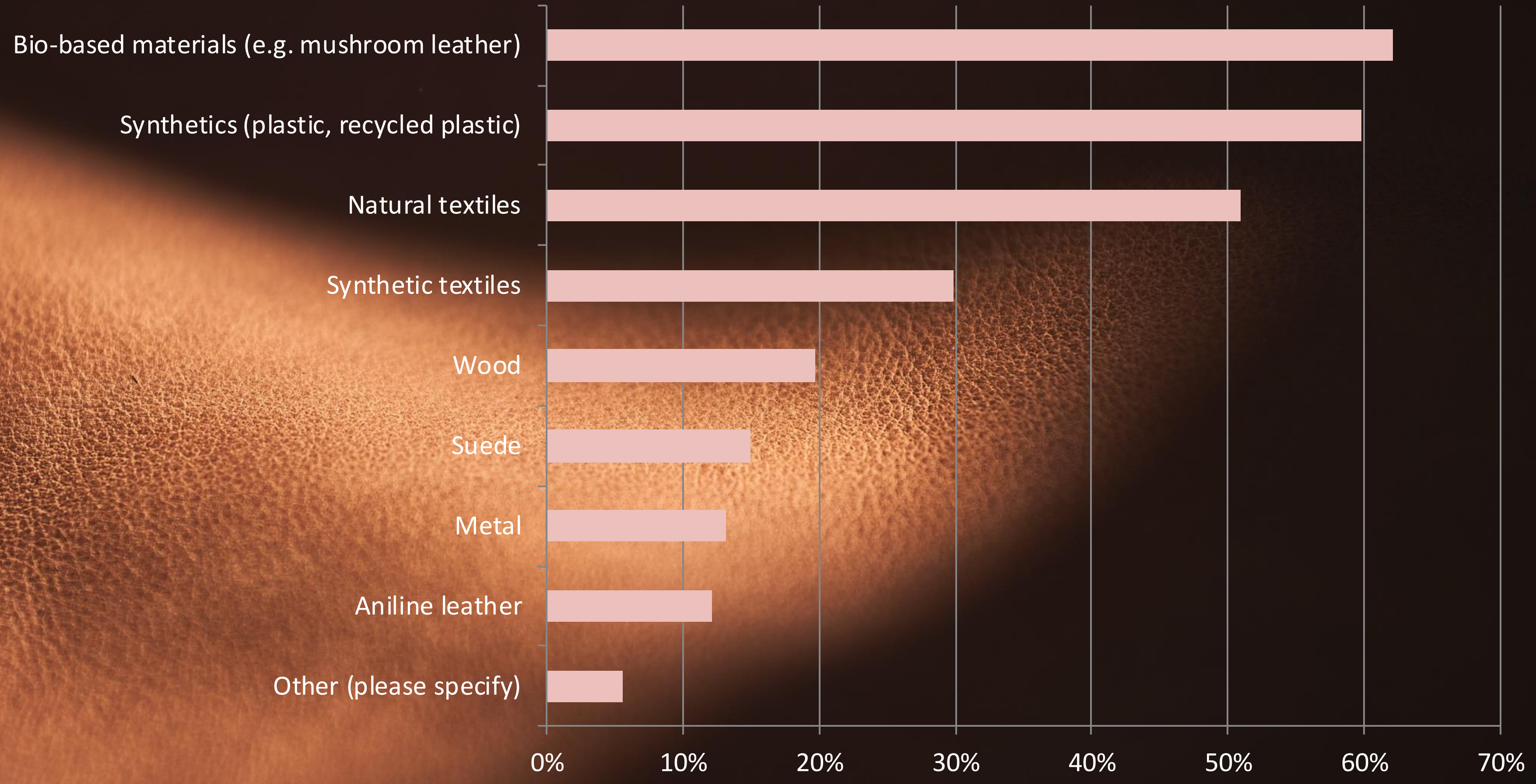
MATERIAL TRENDS - GLOBAL

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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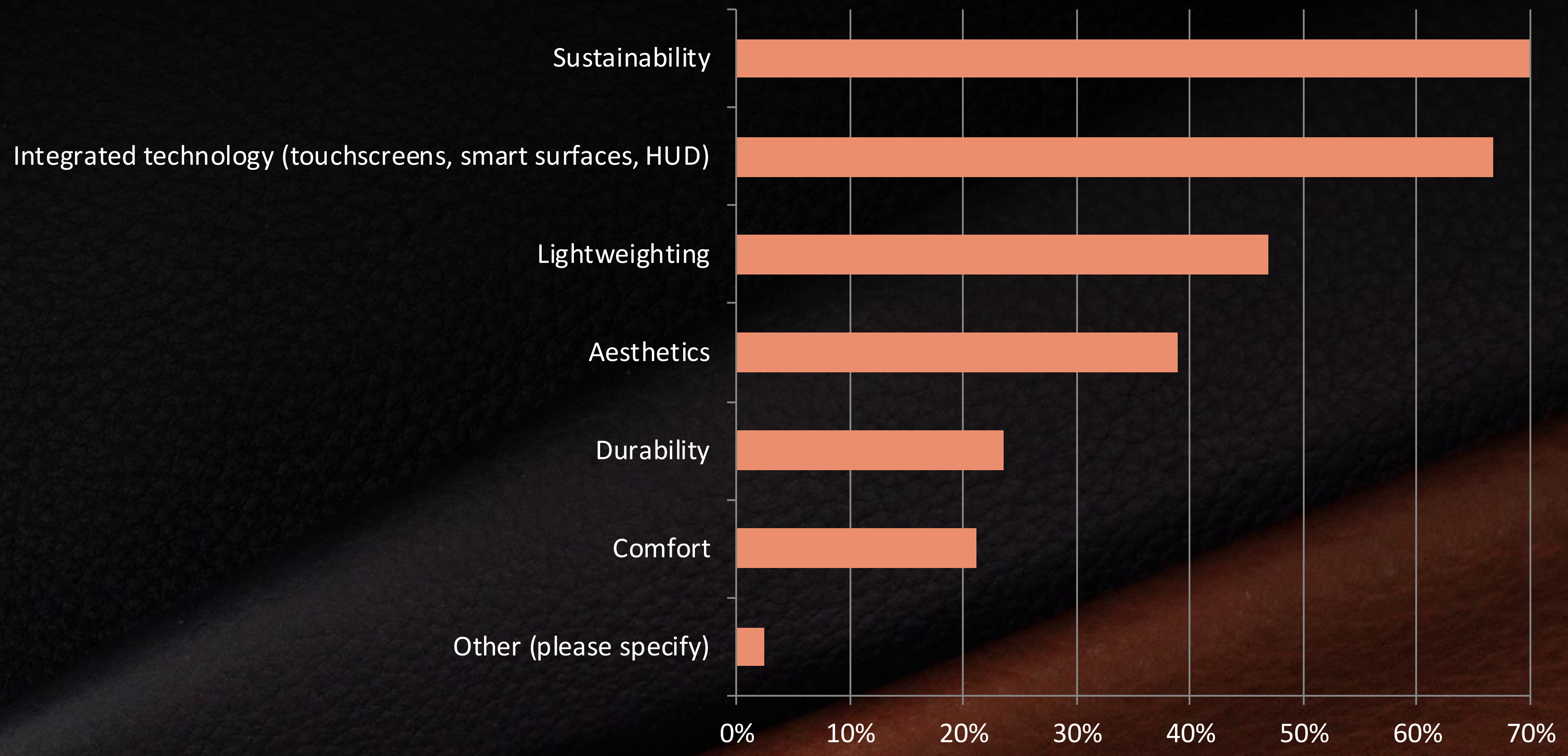
MATERIAL TRENDS - GLOBAL

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



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Sustainability & Integrated technology dominate

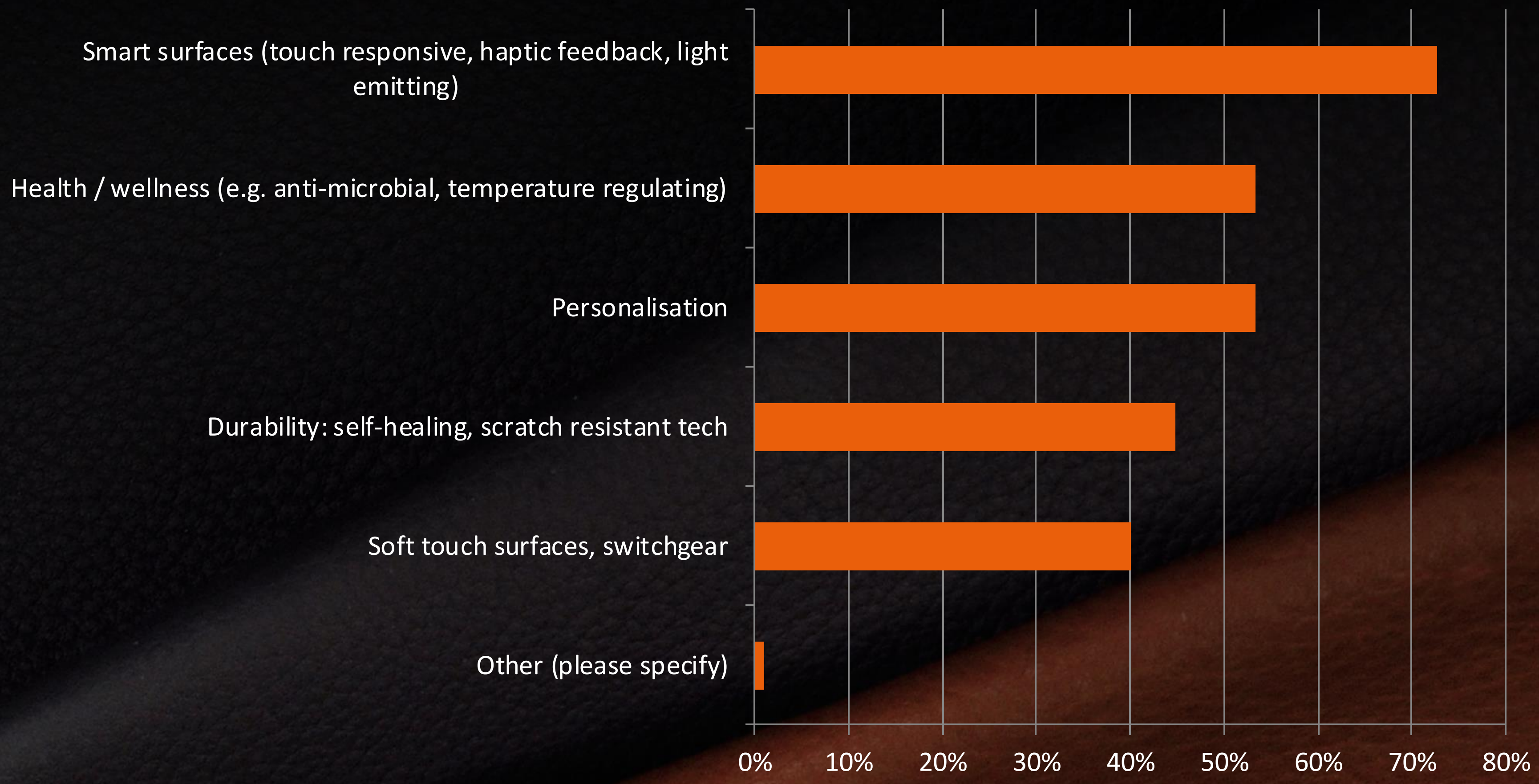
Within the area of materials innovation, the leading response was **Sustainability (70%),** followed by **Integrated technology (touchscreens, smart surfaces, HUD) (67%).**

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%).**

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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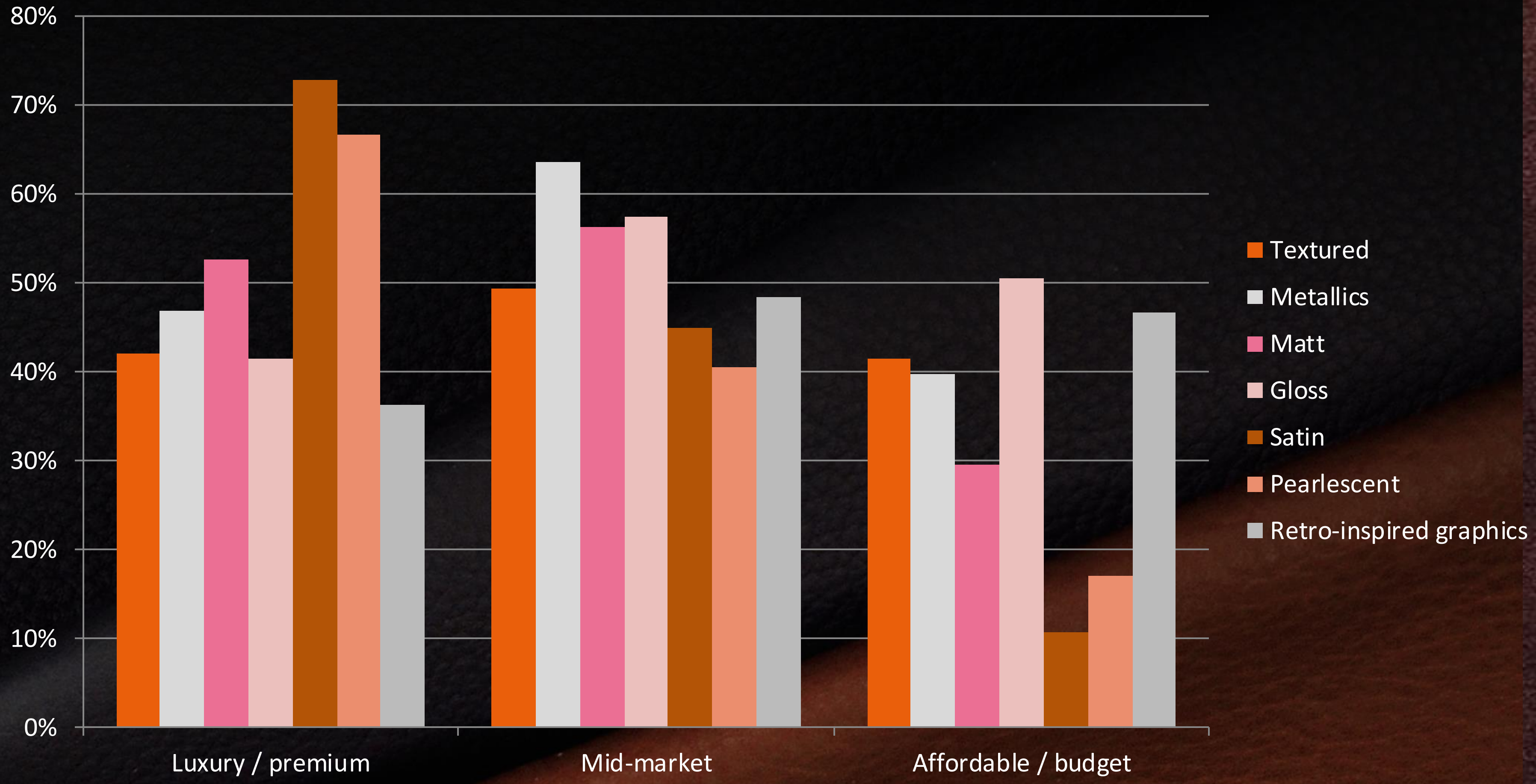
FINISH TRENDS - GLOBAL

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-market** 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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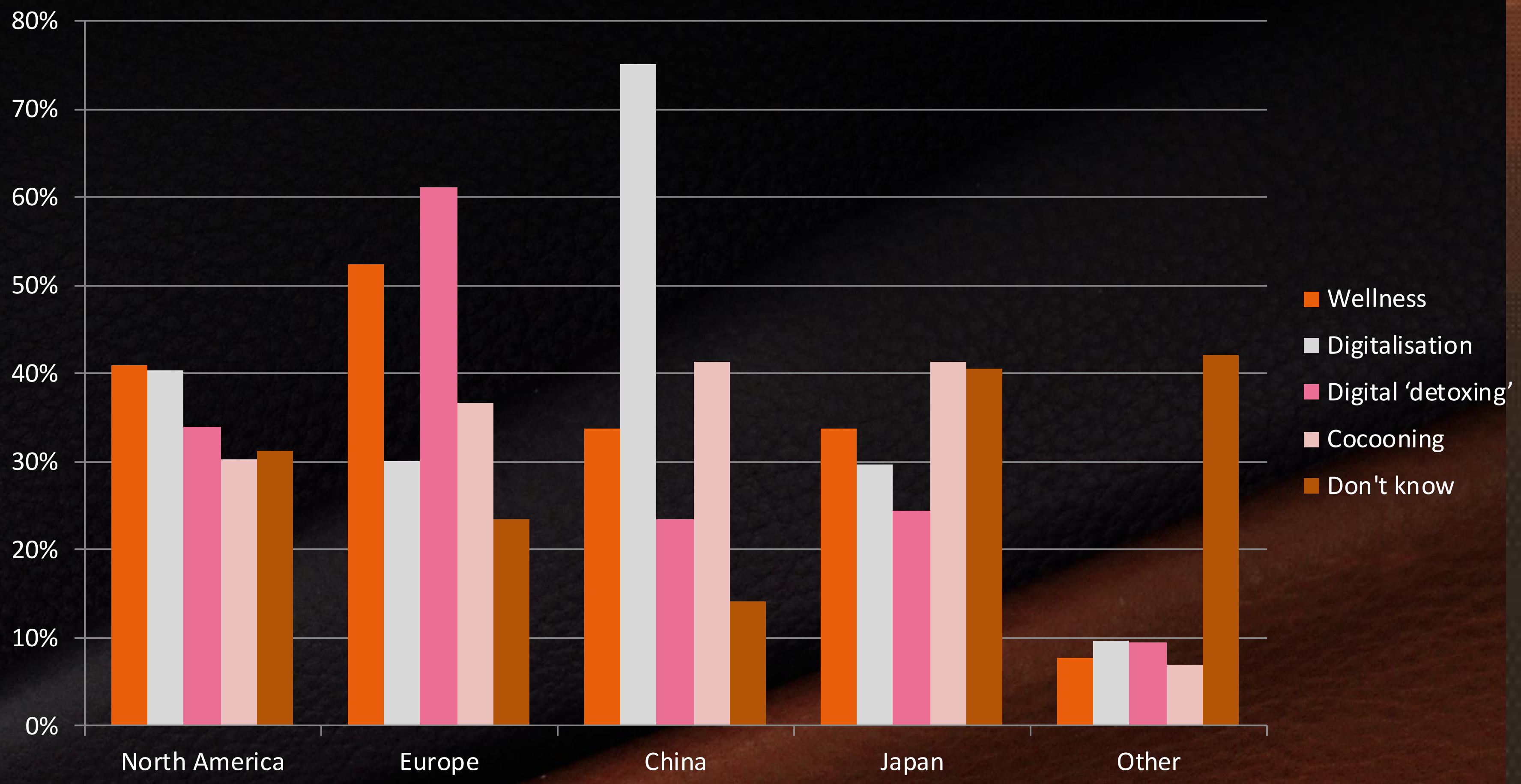
CULTURAL & CONSUMER INFLUENCES - GLOBAL

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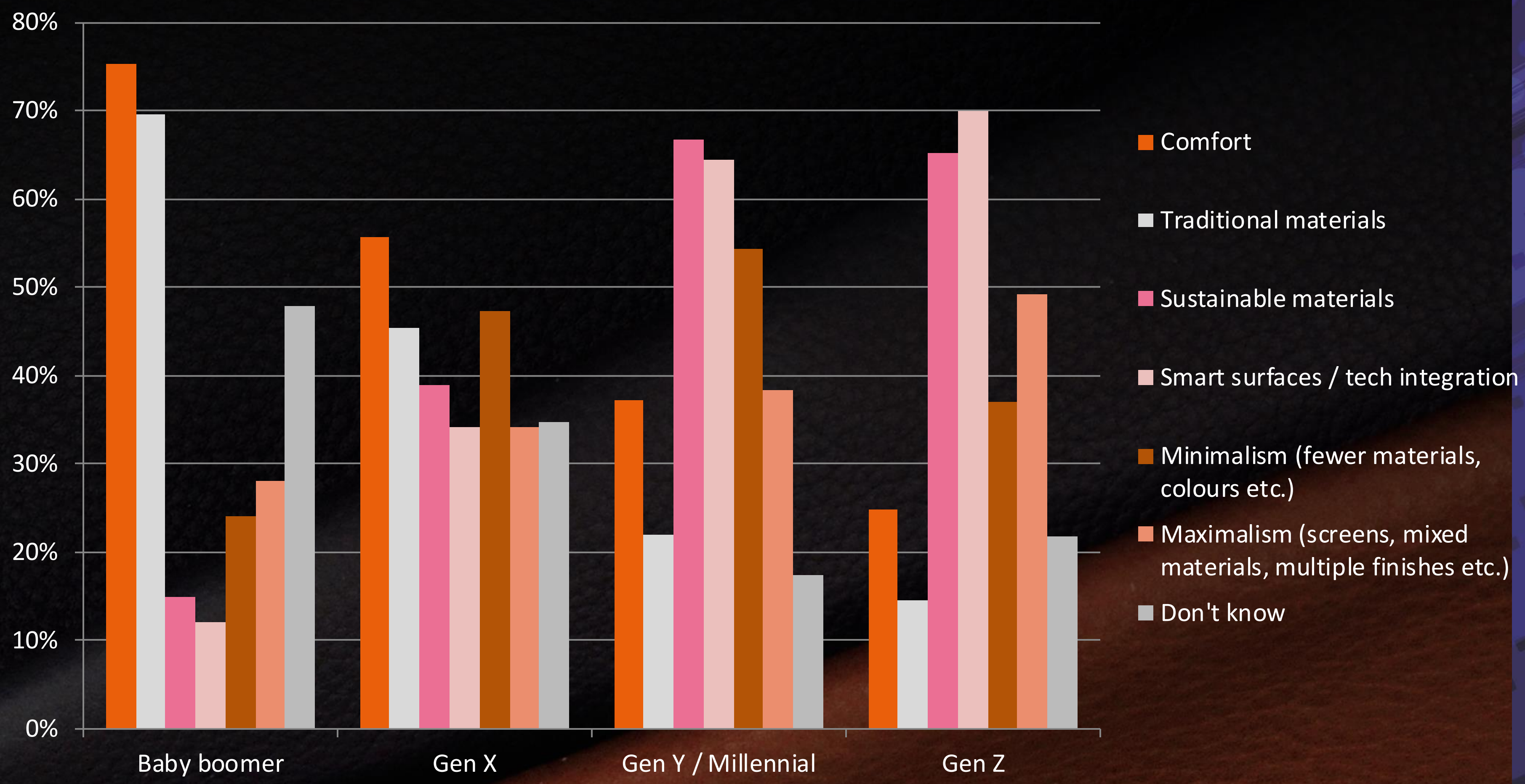
Q10. Which aspect of INTERIORS will the different GENERATIONS prioritise in 2025?



Baby boomers prioritise 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 have a balance of priorities

For **Gen X**, the priority was **Comfort (55%),** followed by **Minimalism (49%), Traditional Materials (44%), Sustainable Materials (38%), Smart Surfaces / Tech Integration (35%),** and **Maximalism (32%).**

Millennials prioritise 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 **Smart Surfaces / Tech Integration (70%),** and **Sustainable Materials (67%).**

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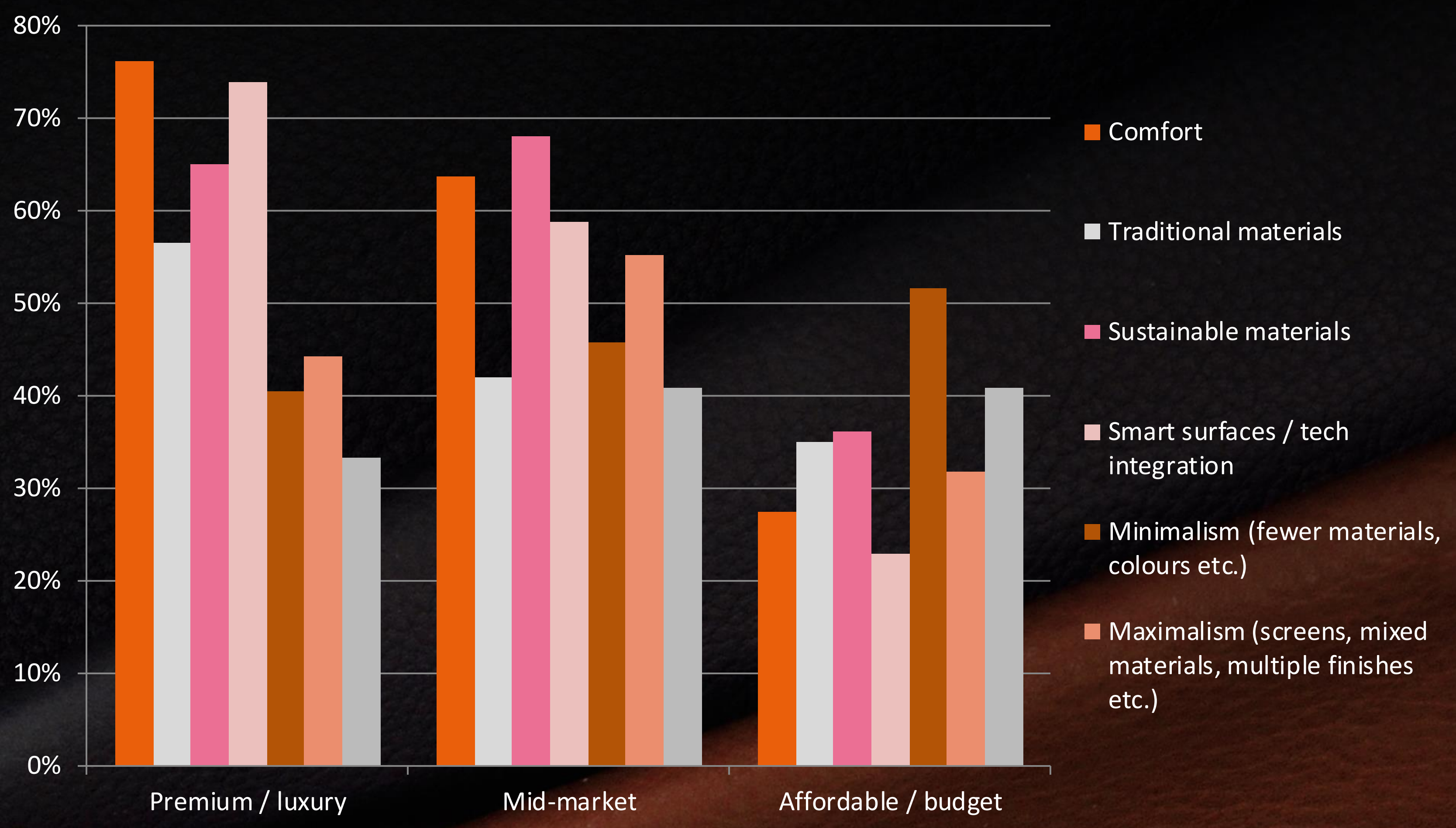
Q11. Which aspect of CMF will be prioritised for each vehicle segment?



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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%).**

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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