


CONSUMER TREND REPORT | AUTOMOTIVE INDUSTRY

START YOUR ENGINES

DRIVING INNOVATION: KEY TRENDS REDEFINING THE AUTOMOTIVE EXPERIENCE

2025

TREND REPORT BY
ANTONIO & PARIS



Since the industrial era, America has been the land of the automobile. The nation's vast Interstate Highway system has allowed consumers to explore, grow, relocate, connect with each other, and do business, all thanks to their personal vehicles. Our cars, trucks, SUVs, and motorcycles have come to represent not only freedom to travel but also a sense of self for the majority of consumers—**so why do automotive manufacturers find themselves lacking in consumer data more than almost any other industry?**

How can we change that?

And how can having more consumer data help them thrive?

Gone are the days when a few major brands dominated the roadways. Consumers have more choices than ever when it comes to their cars, just as they do with most other areas of their lives. The market is saturated with more competition and new technology that has never been seen before.

To come out on top, brands must abandon reliance on the old-fashioned car sales lot and innovate. Navigating the tides of changing market trends and consumer needs, makers need to study the data available both inside and outside the automotive industry to learn more about their audience.

In this report, we'll examine current market trends in auto sales and care and make overall predictions of what consumers will be searching for in their next car based on what's in demand from other industries. Combining the nostalgia and freedom of personal automotive travel with the excitement of the future, from tech to safety and even sex appeal, will help automotive brands rise above sales slumps and secure brand loyalty.

A DISRUPTION IN DATA

Despite being one of the earlier modern industries and certainly one of the strongest, automotive brands are lacking in consumer data to help them with their marketing and growth efforts.

Here are a few reasons why they might glean less information about their audiences than other industries:

LESS FREQUENCY IN BUYING

According to research by [The Zebra insurance](#), Americans averaged owning their cars for eight years in mid-2024, and the average age of vehicles on the road was pushed up to 12.5 years. The gap between consumers visiting a dealership to purchase a vehicle means car brands don't collect new data from their direct audience as often, either.

THE MIDDLEMAN

The [franchised car dealership model in the US is enshrined in law](#), with the first ones being credited to Ford in the early 1900s, with Chrysler and General Motors soon following suit in selling their models through independently owned dealers across the country. The dealership model largely persists today, although dealers often sell more than one brand of vehicle now, and resales muddy that statistic even more. The franchise model of dealers buying from the manufacturer and then selling to the consumer can mean auto brands are not getting as much consumer data as they would if people were buying directly from them.

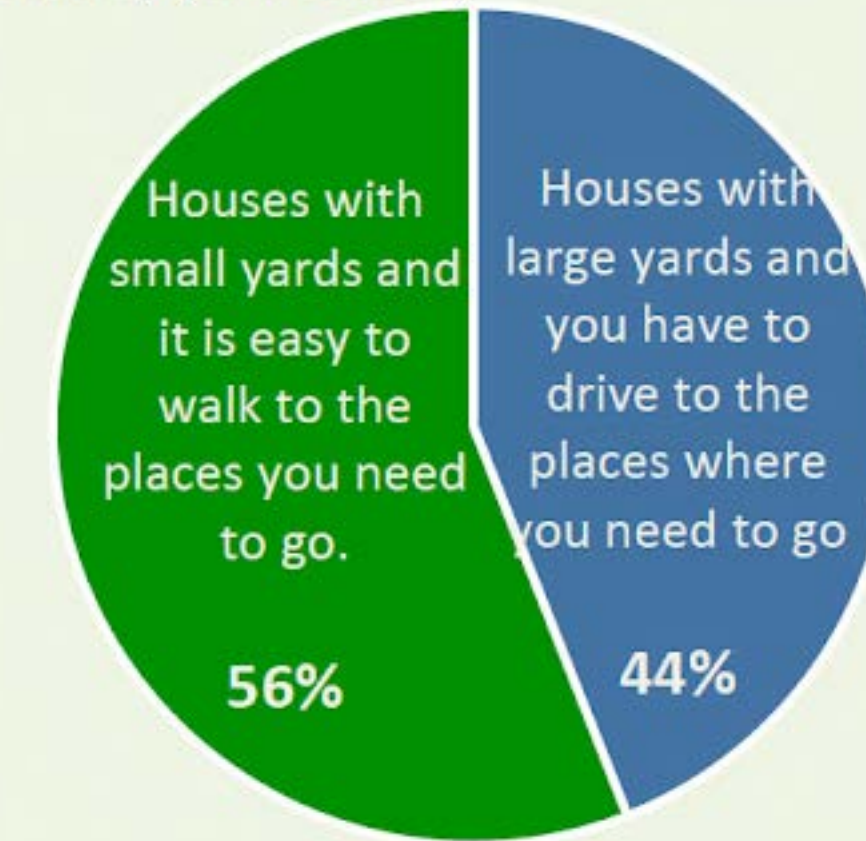
A RISE IN WALKABILITY

After facing the growth of suburbia for the past 70 or so years, more Americans now desire the health, social, and economic benefits of living in more walkable urban areas, reducing the reliance on cars. [Smart Growth America](#), [Commercial Edge](#), [the Congress for the New Urbanism](#), and more have reported on the value and increasing demand for more walkability, bike lanes, and public transit for American towns and cities. A decrease in the country's reliance on cars, in turn, decreases auto brands' connection to potential consumers.

MOBILITY AS A SERVICE (MAAS)

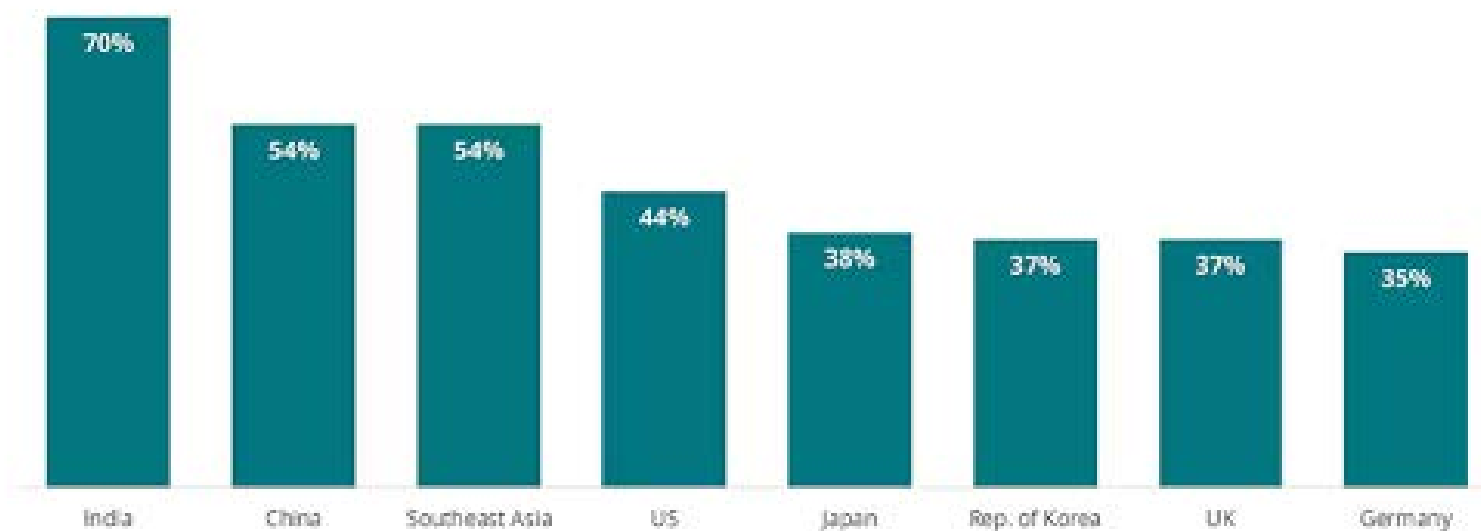
[Deloitte's 2025 Global Automotive Consumer Study](#) found that many younger consumers are interested in MaaS over traditional car ownership. In fact, around 45% of the 18–34-year-olds surveyed said they would be somewhat willing, willing, or very willing to give up vehicle ownership in favor of a MaaS solution. This demonstrated lack of enthusiasm for their cars represents a disconnect between consumers and vehicle brands.

Figure 16 Community Preferences Survey (NAR 2023)



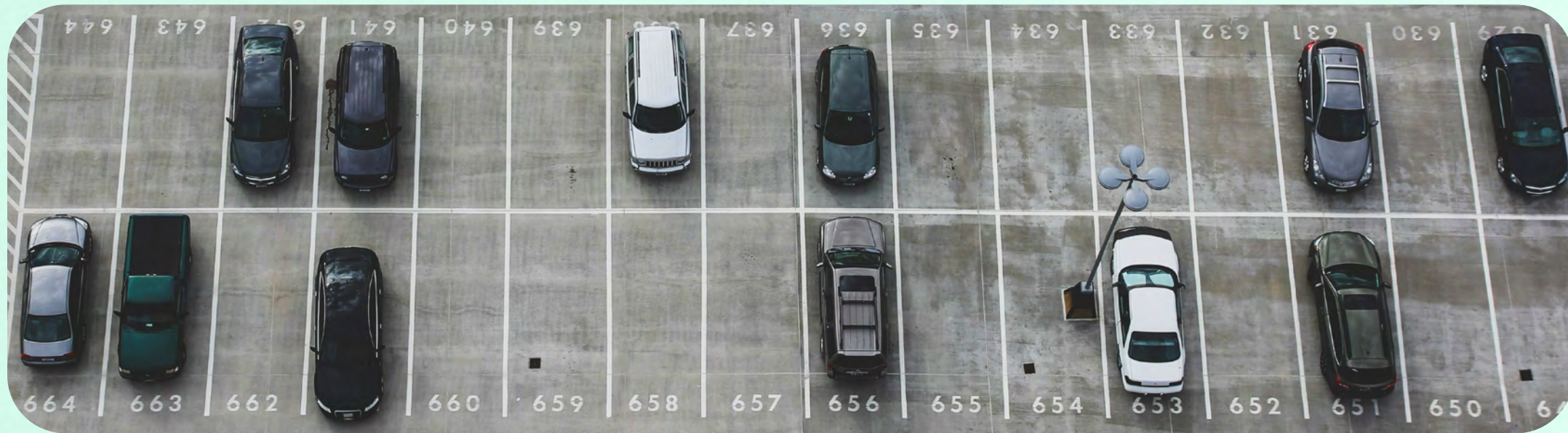
National Association of Realtor surveys indicate that most people prefer compact homes in walkable neighborhoods over houses with larger yards in sprawled areas.

Willingness to give up vehicle ownership in favor of MaaS (% somewhat willing/willing/very willing) - 18- to 34-year-old respondents



What is the state of brand loyalty today Q. in the automotive industry?

It's in flux. A.



According to a 2025 [Global Automotive Consumer Study by Deloitte](#), which surveyed **over 30,000 people in 30 countries**, customers' expectations are "rapidly evolving," leading to more willingness to switch their intended car brand during the buying process or to defect from the brand they currently own.

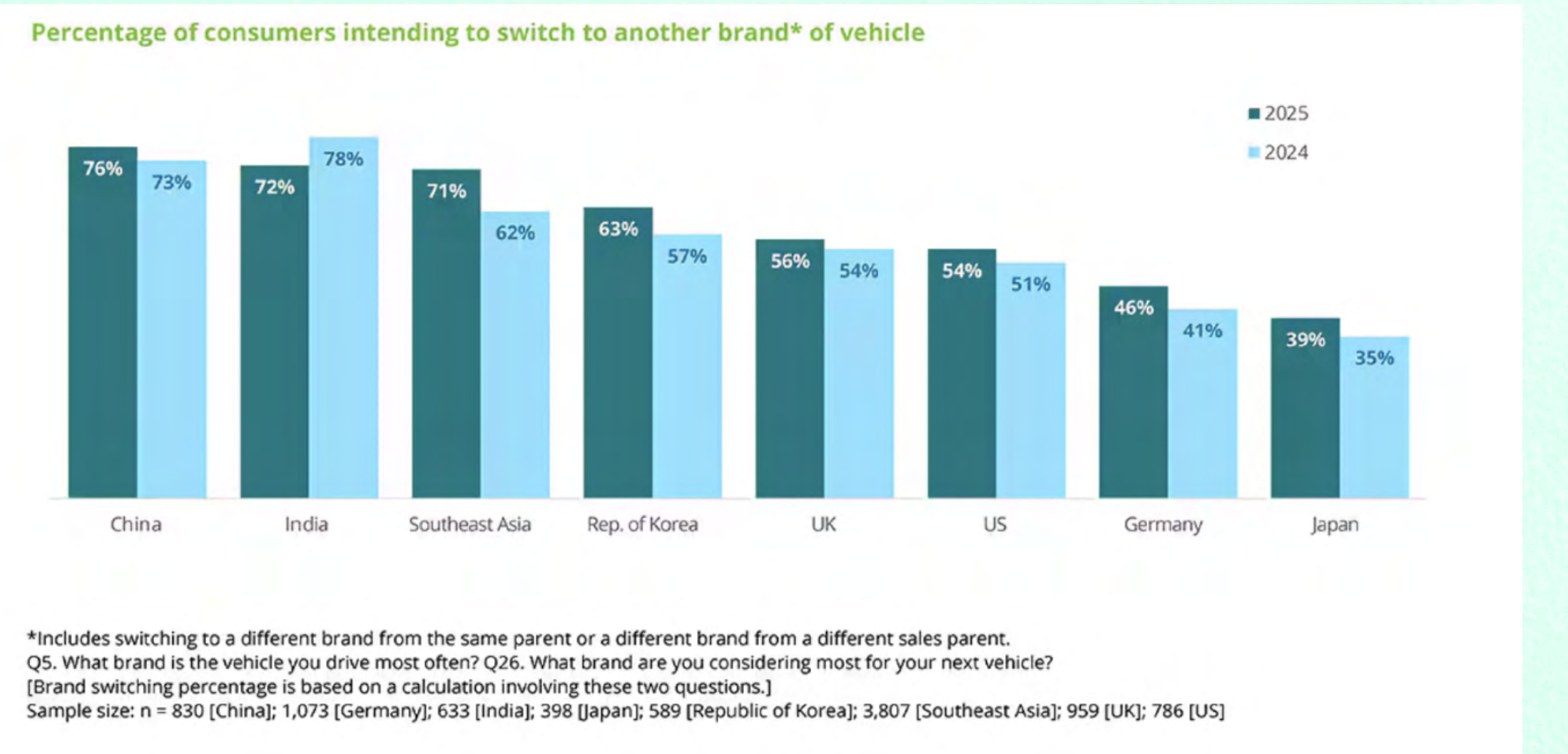
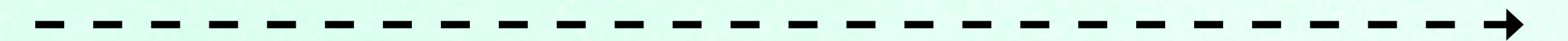
While **consumer loyalty for vehicles has risen** since it hit a low during the COVID-19 pandemic, the study found that **over half of American consumers surveyed in 2024 and 2025 were planning to switch to another brand the next time they buy.**

Others, as previously mentioned, were interested in seeking "**Mobility as a Service**" solutions—relying on ride-share options, subscription-based models, public transit, and bike or scooter rentals, for example—over owning or leasing a personal vehicle.

This trend was pretty high across all countries surveyed, with Japan being the least likely to switch, but still seeing between **almost 40% of consumers consider it.**

Q. So, how can auto brands retain their consumers, gain new ones, and build a stronger connection with them, especially when they might be lacking in data?

A. Study consumer trends in multiple markets and industries to gather valuable insight, then apply it to your brand.



TRENDS

CONSUMER BEHAVIOUR 2025

To recognize the most crucial points where auto brands can connect and foster loyalty with audiences, it will be imperative to fill in consumer data gaps in your arsenal with insight from overall consumer trends and markets that may be directly adjacent to car manufacturers.

By better understanding people, their lifestyles, and their core values in 2025, you can build a more complete picture of your target audience and begin to truly dig into how you can best serve them in ways no one else can.

11 Consumer Trends to Watch in 2025

(According to Shopify)

1. Buyers impacted by inflation are seeking deals.
2. Social ads are still a big driver of purchase decisions.
3. Brand loyalty is waning.
4. Brand collaborations cut acquisition costs.*
5. Social media is a core discovery tool.
6. Customers demand low-friction returns.*
7. Brands look to omnichannel experiences to reach more customers.
8. Building relationships starts locally.*
9. Supply chain issues persist, but brands are getting creative.
10. Personalization is in demand, but privacy is paramount.
11. Buy now, pay later options are popular with younger shoppers.



#4 Partnering with another lifestyle brand allows you to share advertising costs, build goodwill, and grow your reach among each other's customers. Just make sure your brands make sense together. For example, when fashion label Aimé Leon Dore teamed up with Porsche in 2024, they partnered [on an episode of ADL's story-driven video series called "Doublemint,"](#) a [fashion collection](#), a [customized vintage 1986 Porsche 944 Turbo](#) that was displayed at ALD's New York location, [and a custom Porsche 993 Turbo](#) displayed at the fashion brand's flagship store in London.

#6 Smooth the road for customer satisfaction and fewer rocky returns by making the test drive an experience. Let the consumer test drive their potential new vehicle for a week so they start to rely on the new car experience and miss it when they return the car.

#8 Dealerships, like any franchise, are most successful when they foster a deep connection with their community. New and struggling locations may need support to foster that relationship.

GENERATIONAL CONSUMER TRENDS

(According to Shopify)

Baby Boomers

Brands targeting a boomer audience shouldn't discount more traditional advertising channels. Sixty-two percent of this group reported that they discover products most often through cable television ads. They also say that brands shouldn't take a stance on social issues.

Gen X

These consumers prefer to discover new products via social media, search, and retail stores. They're the generational group that discovers new products on social media more frequently than any other channel, even though it isn't their preferred way to do so. However, only 19% have bought something through an in-app shop in the past three months.

Millennials*:

Converting this generation means more than just offering a great product. Millennials are increasingly voting with their dollars, and 47% say they prefer to support brands that offer sustainable products or take a stance on social issues. Of the millennials surveyed by HubSpot, 43% have bought a product through an in-app shop in the past three months, while 36% have bought something based on an influen

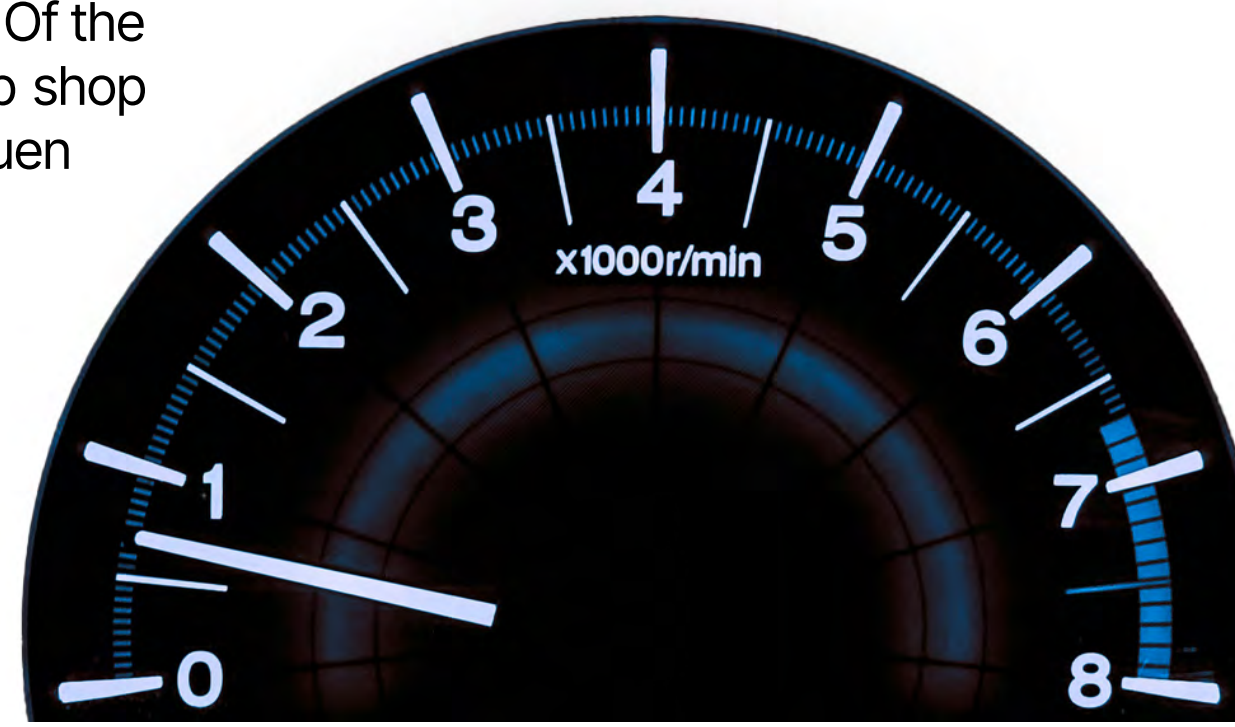
[*CLICK HERE to download A&P's Millennial Report for more insight!](#)

Gen Z

This group is all about social shopping. They use Instagram, YouTube, and TikTok to search the internet and discover products, but they also seek out recommendations from their nearest and dearest. In fact, 37% have bought a product based on an influencer's recommendation in the past three months and a further 43% have bought a product through an in-app shop.

Gen Alpha

The oldest of this generation are now teens and are a demographic of future consumers that brands shouldn't ignore. But even before these kids have their own disposable income, they already wield significant influence over household spending. Appeal to Gen Alpha through transparent, meaningful, and authentic messaging.



DRIVER'S ED:

mini WORKSHOP

Expand Your Avenues of Strategic Problem-Solving & Brand Inspiration

THE CHALLENGE

Don't get stuck in a silo or echo chamber. Seeking solutions in only your industry, stemming from a single idea, or focusing on a specific sector of your business can cause roadblocks. Innovation drives success.

YOUR ASSIGNMENT

Look outside the auto industry for inspiration. What's the new thing happening in entertainment? Health care? F&B?

STRATEGIZE

Can that latest trend be applied to your challenge?
How can you turn that idea into a valuable new experience for your customers?



STRATEGIES & SOLUTIONS

Q. What do these trends mean for the automotive industry?

A. By studying the more general needs and wants of consumers across all sectors, auto manufacturers can whittle down the most important trends for their customers and use those key points to build strategic marketing and brand initiatives that will drive revenue and increase brand loyalty.

how to RETAIN YOUR CUSTOMERS

01

Demonstrate trustworthiness, authenticity, and transparency

SCAM
ALERT



Consumers are weary of being slammed with hidden fees, being scammed by fake profiles in their inboxes, text messages, and social media DMs, and being unsure about whether what they see online is real or fake, especially with the rise of AI-generated content. "Trust has come up repeatedly for the last ten or fifteen years, but what we're hearing this year is, 'I'm not sure about clicking,'" said Mark Curtis, head of innovation at Accenture Song, [in a recent WSJ article](#). "It's going to lead to a revival and a resurgence in the importance of brands as symbols of authenticity." What do the brands stand for other than selling a vehicle? Authenticity and values will be key particularly for the Millennial segment.

02

Simplify the customer journey

Innovating beyond the traditional model of the American car dealership could allow brands to market more directly to their consumers, simplifying the buying process and allowing them to gather more direct audience data at the same time.

Working more closely with dealerships could also aid in staying better connected with customers and staying up to date on intel coming through the "middleman" dealerships.

Don't just communicate to sell a service. It's time to offer continuous validation of the purchase.



03

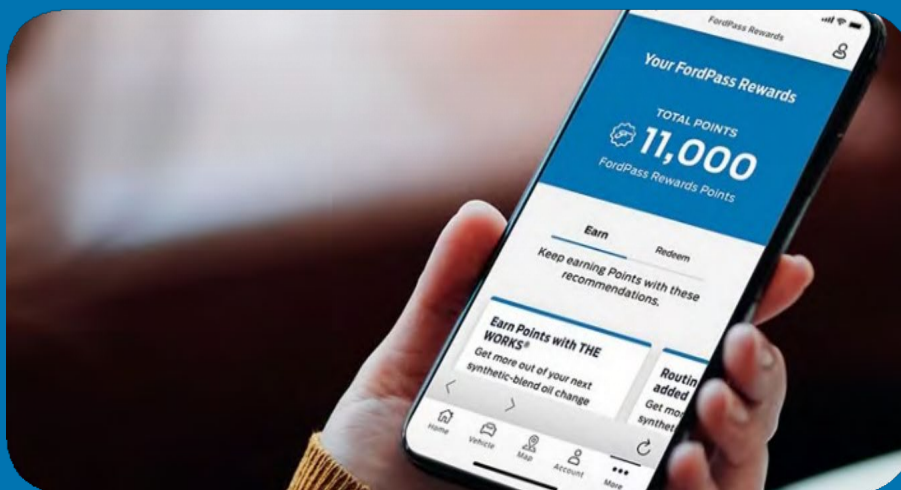
Make customer journeys shorter and increase sales frequency

Persuading consumers to capitalize on trade-in value by trading in their vehicle sooner rather than later is already a dealership-employed marketing tactic, but auto brands can also take advantage of it to strengthen their bottom line as well as foster more consumer loyalty.



how to RETAIN YOUR CUSTOMERS

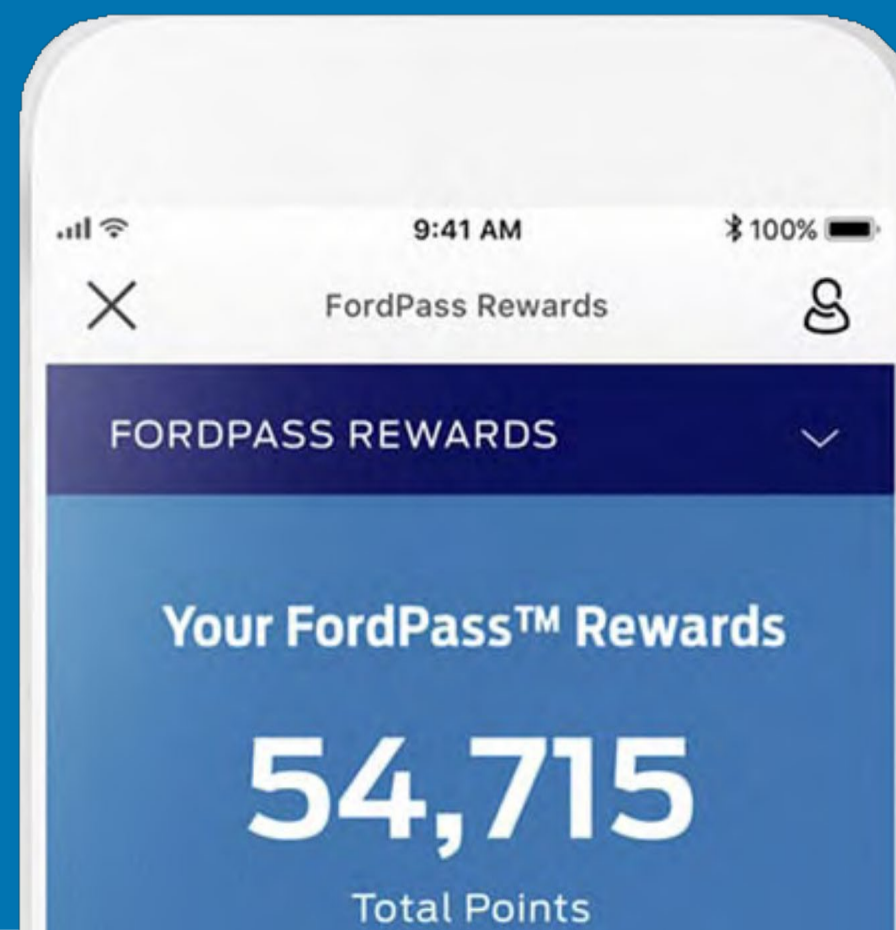
04 Reward customers for their loyalty



Brand loyalty is projected to drop by 25% in 2025 due to rising prices, but loyalty programs will gain traction as consumers seek value.

FordPass Rewards by Ford stands out in the automotive industry, offering points for vehicle purchases, servicing, and sign-ups. These points can be redeemed for maintenance, accessories, or a new car. The app enables easy tracking, service scheduling, and remote vehicle functions.

FordPass Elite members get additional perks like complimentary maintenance, roadside assistance, and VIP experiences. Unlike basic discount programs, FordPass Rewards drives real savings, enhancing retention and long-term loyalty.



According to [Forrester's 2025 B2C marketing and customer experience predictions](#), rising prices will prompt brand loyalty to decline by 25% in 2025.

But while brand loyalty falters, loyalty programs will gain in popularity as consumers look for brands that provide value and give them a reprieve from price hikes. One standout recent loyalty program in the automotive industry is FordPass Rewards by Ford. Customers earn points for purchasing a new Ford vehicle, servicing their car at a dealership, or even just signing up. These points can be redeemed for maintenance, parts, accessories, or even towards a new vehicle.

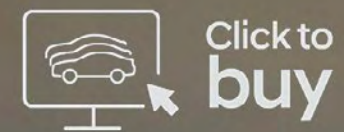
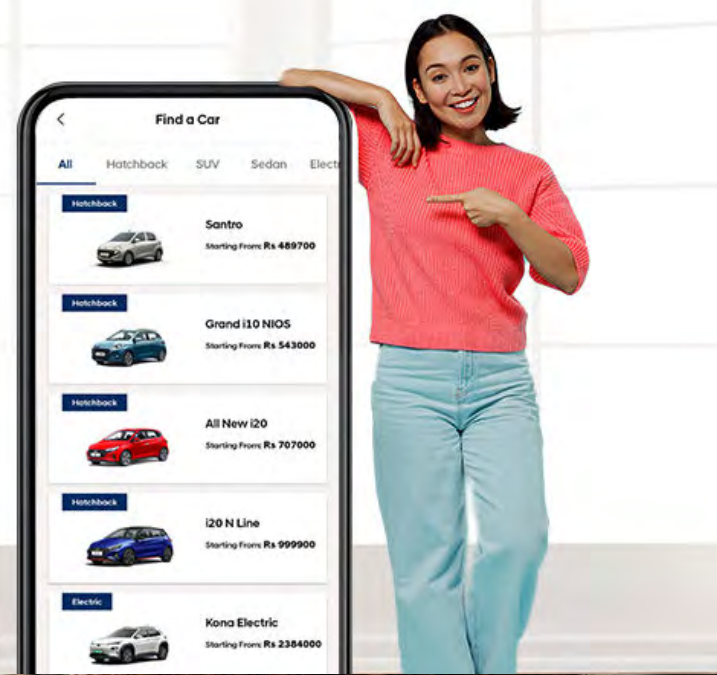
The FordPass app makes it easy to track points, schedule service, find gas stations, and even remotely start the car. FordPass Elite members (for premium customers) get extra benefits like complimentary maintenance, roadside assistance, and VIP experiences. Unlike some programs that only provide discounts, FordPass Rewards directly translates into real savings on necessary services and future purchases, making it a tangible value-add for customers.

Making customers feel appreciated even after the initial sale is key to retaining them and encouraging repeat business.



Get the convenience of showroom from comfort of your home.

With myHyundai application.



Click to buy

Shop. Sign. Buy.
All from home.

Click to Buy.
Buying your new Hyundai can take as little as 5 minutes from start to finish.



SPARK PLUG

Think Deeper When It Comes to Rewards & Discounts. **Provide real, tangible value.**

According to [Nielsen NIQ's 2025 Consumer Outlook](#), "Consumers are redefining 'discount.' Affordability and price are almost always the baseline factors shaping consumer decision-making. But as inflation has begun to stabilize and the past six months have brought some renewed signs of resilience, consumers are viewing their definition of discount in an entirely new light, creating new opportunities for companies that recognize this shift.

Today, consumers are not only intrigued by—but have come to expect—a hybrid approach to delivering value for money . . . What's more, nearly half (49%) said they feel most comfortable with person-to-person support interactions and would wait longer for support from a human as opposed to an AI customer service rep."

EXAMPLE

Hyundai's Complimentary Maintenance & Evolving Loyalty Approach

Hyundai has taken a proactive approach to redefining value beyond traditional discounts by offering Hyundai Complimentary Maintenance—a program that includes free oil changes and tire rotations for three years or 36,000 miles on new purchases.

This goes beyond simple price cuts, offering real, tangible value that keeps customers engaged with the brand and its service centers.

Additionally, Hyundai's Click-to-Buy program blends affordability with personal support, allowing customers to complete most of their car purchase online while still having access to live human assistance. This aligns with shifting consumer expectations—offering a hybrid approach where digital convenience meets personalized service.

HOW TO RETAIN YOUR CUSTOMERS

05 Stay in touch and top-of-mind

Now, more than ever, engagement and support cannot stop after the purchase is completed. You must keep your consumers happy throughout the life of their car, because if they are not satisfied, they will go to a competitor when they decide they want a new vehicle.

Staying better connected to the customer in between big purchases will build trust and incentivize them to stick with you because you know them best.



06 Continuous Customer Activation

Building off the previous point of communicating with customers regularly even after their car purchase, you should build customer experiences, rewards, surveys, events, memberships, products, or other programming that will keep them engaged in between vehicle purchases.

They might not be ready to buy a new car, but that doesn't mean they won't buy accessories, a maintenance plan, or merchandise, attend a brand event, or engage with brand content online.

07 Use the data at your disposal

Obtaining a sophisticated understanding of customers, including how their needs differ across regions, or behavior-based segmentation, can help reveal new areas of improvement for the consumer experience or loyalty-building opportunities.

Develop a data warehouse to enhance your first-party data. Create actionable segments by deploying cluster analysis utilizing AI.

Even looking outside your direct audience to broader consumer trends and adjacent markets, as we do in this report, can glean valuable insight into what customers want and need in 2025 and beyond.



how to CAPTURE NEW CUSTOMERS

know your brand values and communicate them

Aligning your messaging with values that resonate with your audience is important. For instance, younger buyers might care more about sustainability, transparency, and social responsibility, while older generations might focus on reliability and comfort.

You don't necessarily have to choose one, but you should strategize how to connect with the groups you most want to engage as your target audience.

get personal

People want products that will make their lives easier, more fun, safer, or more personalized to their unique taste and needs. Tailoring your brand's messaging and customer journey around these aspects (e.g., treating their car as an extension of the self, not just a status symbol) can resonate with new audiences.

rewarding word-of-mouth

Offering incentives for referrals, whether in the form of cash, discounts, or exclusive experiences, can turn satisfied customers into brand advocates who bring new customers to your door. Referral programs strengthen effective word-of-mouth marketing that directly reaches and impacts other consumers, leading to more conversions and purchases.



make car ownership cool again

Don't pressure your audience—seduce them. There's nothing wrong with marketing sex appeal.

Strategies like popular brand collaborations, product placements in hit movies or television series, partnering with live entertainment and sports such as Formula 1 racing, offering customization or limited-edition products, and utilizing influencer or celebrity marketing can create buzz and desire for your brand among audiences who may not have seen what you have to offer or may not have considered purchasing with you before.

Alfa Romeo taps into its Formula 1 legacy to make car ownership aspirational, sponsoring the Alfa Romeo F1 Team and launching F1-inspired special editions like the Giulia Quadrifoglio 100th Anniversary model.

By blending high-performance engineering with the glamour of motorsports, Alfa Romeo seduces enthusiasts rather than selling to them, positioning its cars as symbols of speed, luxury, and exclusivity.

cross-generational content

According to [a study by The Drum](#), the traditional, age-based approach to content targeting is being turned on its head.

Over 70% of 50–64-year-olds are active on platforms once considered Gen Z territory. TikTok's star creators include "granfluencers" as well as college students. Meanwhile, TikTok's For You feature is serving up tailored feeds adapted to an individual user's preferences, not to their age group.

As a result, **older generations are more connected to youth culture**, and messaging should speak more to an audience's priorities than their age.

Are they most interested in value, safety, freedom, affiliations, or something else?

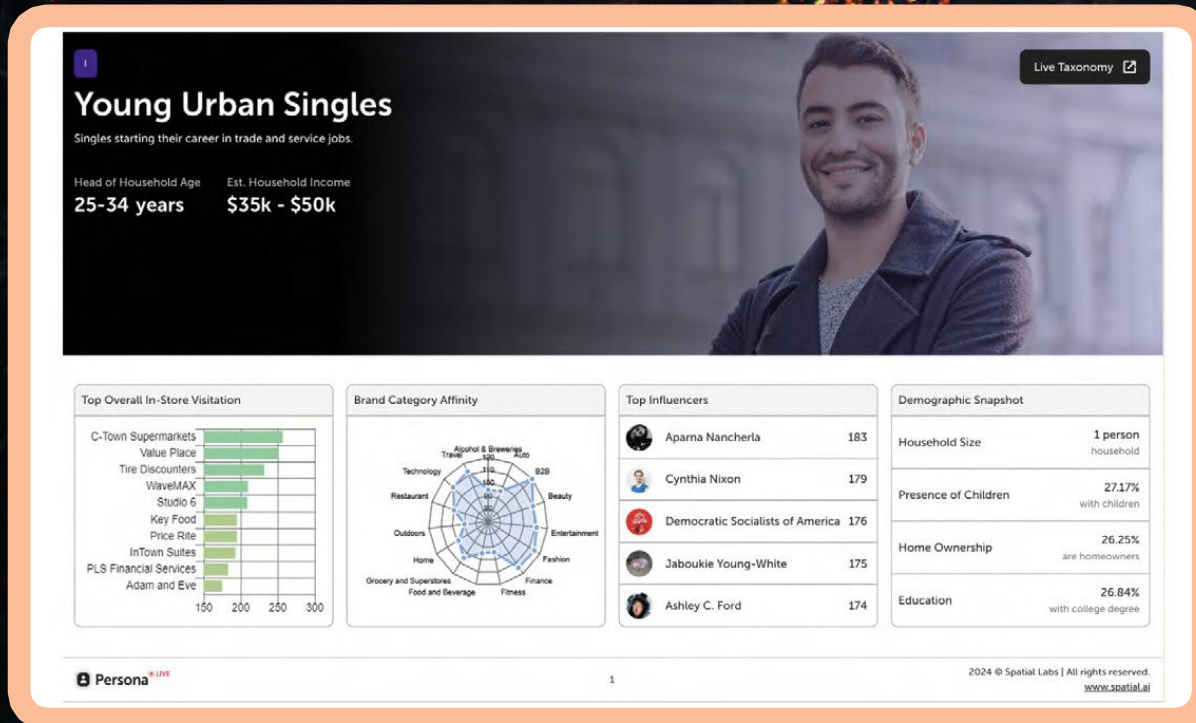
This shift is creating opportunities for content that not only reaches and resonates across platforms and age groups but is also more budget-friendly.



White Space Market Analysis

Where have you lost customers, or where are there gaps in your current consumer profiles?

Car manufacturers notoriously know less about their customers than other DTC industries, so filling in these gaps through research and strengthening customer relationships will give you an advantage over competitors and build your strategy for future growth and innovation.



Jennifer
Family Navigator | Age: 35 | Location: Denver, CO | Occupation: SAHM

Jen is a dedicated mother of three children under 12 who expertly manages her busy household, relying on her vehicle as a key part of her daily routine. From school drop-offs and extracurricular activities to grocery runs and weekend getaways, her car is more than just transportation—it's a family hub on wheels. Safety, reliability, and convenience are top priorities, as she values spacious seating, easy-to-clean interiors, and smart storage solutions.

Goals & Motivations

- Road trips are cherished opportunities to create lasting memories, making entertainment features, fuel efficiency, and driver-assist technologies essential.
- Her car must seamlessly support her on-the-go lifestyle, keeping her family comfortable, connected, and safe.

Messaging

- Our brand has your busy schedule in mind when we design our features
- Your safety is our #1 priority

"My car is basically my home on wheels. Between school drop-offs, grocery runs, and weekend trips, I need something safe, spacious, and reliable that keeps up with our busy life—and keeps my kids happy on the road."
- Participant #7, Group B, 1:04:22

DRIVER'S ED mini workshop

Keeping Your Audience Engaged Past the Initial Sale

THE CHALLENGE

Automotive sales can be a one-time engagement for consumers, typically experienced through a dealership, with very little follow-up from the car brand itself even during the average of eight to twelve years they might own the vehicle. Manufacturers need to find new ways to connect and keep their customers engaged even when they are not in the buying process.

YOUR ASSIGNMENT

Identify a current problem for your target audience (the problem doesn't have to be directly related to their car). Create a plan for how you could best solve that for them. Take care of the logistics and budgeting later.

STRATEGIZE

How can you use that solution to connect with your customers in a way that will relate back to your brand and enhance consumer engagement, loyalty, and experience? Is there a new service or product you can offer? How can you relate it back to their car-buying experience when they're ready to purchase?

applicable trends in the **AUTO INDUSTRY**

SUVs Are Still #1

According to Forbes' 2024 "Top Trends Driving the Future of the Automotive Industry," SUVs comprised 46.1% of total passenger vehicle sales in 2018, growing to 57.4% by 2023.

This trend is expected to continue, with SUVs projected to exceed 65% of total passenger vehicle sales by 2030.



Some of our favorite SUV marketing campaigns of 2024 embraced the strategy outlined in previous pages of looking outside their audiences' relationship with their vehicle and creating fresh content based on other aspects of their lifestyles:



Hyundai's ["The Drop"](#) commercial integrated the exclusivity of sneaker culture with its new Santa Fe. Blending fashion, pop culture, and leisure created a sense of luxury and urgency, prompting consumers to check out the new model before it's sold out.



Also from Hyundai, ["Drive In"](#) celebrates the state-of-the-art safety features of the 2025 Tucson by depicting a couple pulling out of a busy retro-style drive-in diner, complete with roller-skating service staff.

The juxtaposition of past and future creates an effortlessly cool and desirable vibe.



Meanwhile, Lexus's ["Live Up to It"](#) campaign took to the outdoors with tennis brand guru Woodie White, whose commercial is all about embracing nature on a hike, sharing its benefits with his community, and fostering connections with others.



What Did We Notice About These Three Campaigns?



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Not only did the stories focus on aspects of the consumers' lives outside of their vehicles, not one of these spots was filmed in the typical studio, desert, or coastal highway environment we've seen from so many car commercials over the years.



 LOCATION.

 LOCATION.

 LOCATION.

EMBRACING EVs & HYBRIDS

Gone are the days of Tesla's domination in the EV market.

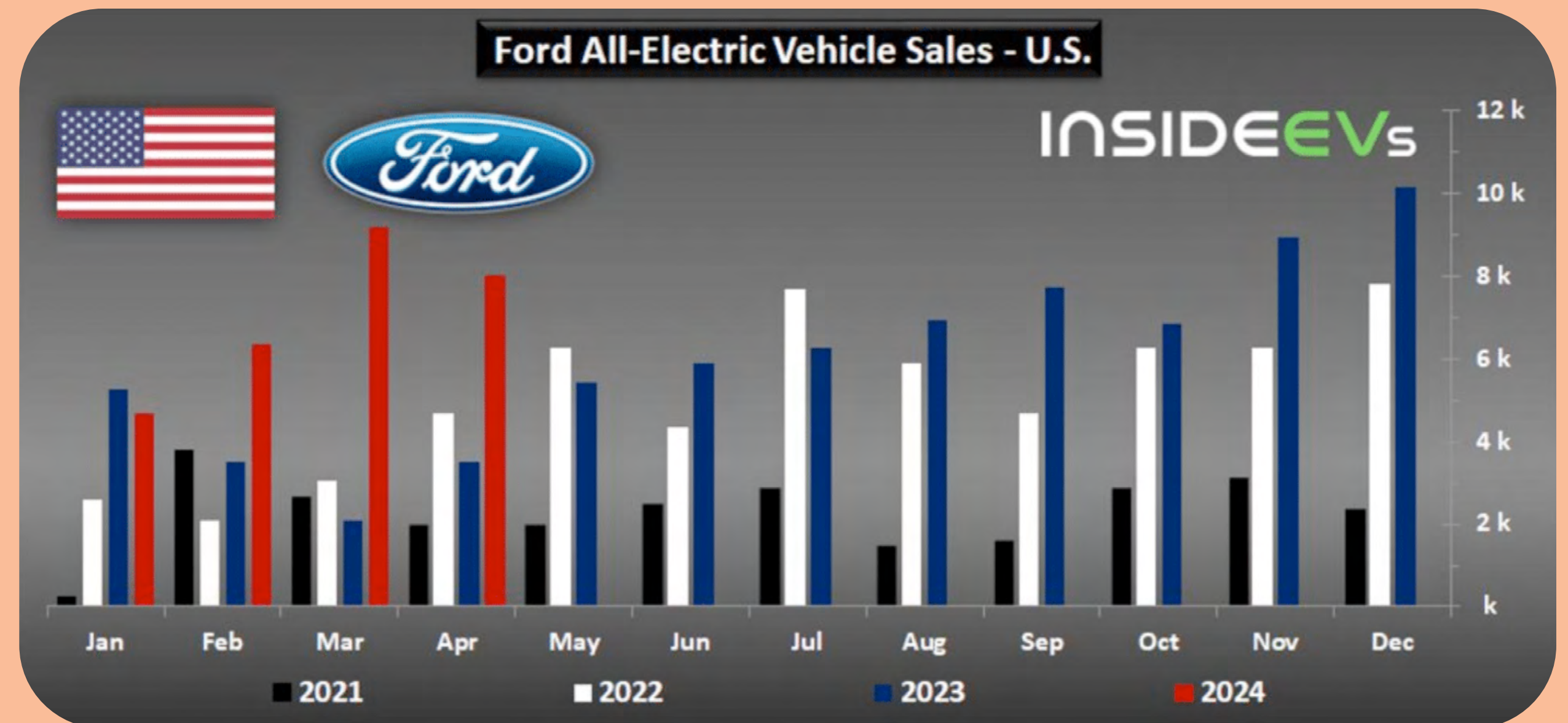
"The next seven years will witness a significant consolidation of EV platforms"

says Forbes.

"OEMs are set to reduce the number of platforms by more than 60%. EV rolling chassis can constitute 70-85% of total BEV BOM cost, compared to ~20% for ICE, which drives this transition. Focusing on cost savings and flexibility, this approach will see companies like Volkswagen exceeding 20 models per platform by 2030, while smaller companies might have 5 to 9 vehicles per platform. The highly flexible platforms are focused on EV production, with hatchbacks, sedans, SUVs, LCVs, and pickups manufactured on a single platform. This trend underscores the industry's shift towards more efficient and scalable production methods."

Jaguar/Land Rover even [redesigned its entire 1960s-built production facility in Merseyside, England](#), to retrofit it into a state-of-the-art manufacturing plant for its new EV lines.

Ford, which said last year that it would [back away from its plan to scale up all-electric sales in favor of a mix of EVs](#), hybrids, and gas cars, sold more than 50,000 Mustang Mach-Es in 2024.





While EVs and Hybrid EVs are on the rise, there is still a larger overall demand from consumers for companies to take responsibility and stand up for the environment. BMW Group, for example, hosted a series of events at London Climate Action Week (LCAW) to carefully lay out its road map toward decarbonizing its business and meeting its commitment to cut emissions from its vehicles—across the entire value chain, from manufacture to end of use—by 40 percent by 2030.

A leader in sustainability practices, BMW was the first automotive company to instate an environmental officer back in 1973. "Beyond just EV, across the whole lifecycle of our vehicles to create a future that is net zero and circular," it says.

"[Our objective as BMW Group](#) is to contribute to urban ecosystems by developing and validating sustainable and scalable business models. We want to be part of the solution—our objective is to positively influence urban life."

As consumer demand for sustainability grows, BMW's proactive efforts set a strong example for the automotive industry, highlighting the importance of integrating environmental responsibility across every stage of production and beyond.

SUSTAINABILITY



CONNECTIVITY

CARS AS THE NEW MEGA-WEARABLE

The Deloitte study tells us consumers desire ultimate accessibility (information and range), personalization (comfort and intuitive settings), and performance (speed and maintenance cost).

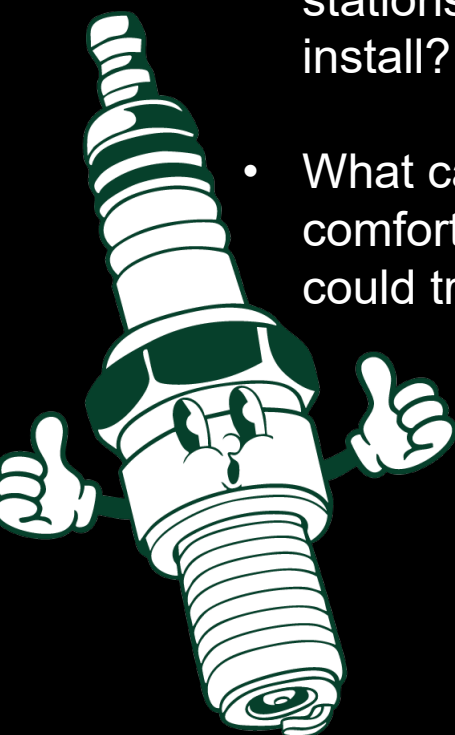
AI and connectivity play a key role in enhancing these experiences, from learning a driver's music preferences to creating personalized playlists, to adapting navigation systems based on driving habits.

Additionally, these technologies can customize seat positions, adjust mirrors, control climate settings, and even fine-tune ambient lighting for each individual driver.

- If drivers enter personal details like schedules, a car's internal system could offer calendar reminders and sync the GPS with calendar appointment locations, or remember that a driver prefers certain routes and offer those (avoid highways, avoid unprotected left-hand turns).
- Depending on the level of a vehicle's ADAS, it could personalize certain handling characteristics to a person's driving style or preferences, as well as monitor driving conditions for signs of driver fatigue or distraction and react accordingly.
- Among those who are interested in connected vehicles, there is a relatively high level of interest in features that provide updates on maintenance, traffic/road safety, and suggestions for safer routes. However, the willingness to pay extra for connected technologies remains comparatively low in developed markets.
- Consumers surveyed in developing markets such as India, China, and Southeast Asia are also more willing to pay for connected vehicle services compared to consumers surveyed in markets such as the United States, Japan, and Germany.

- How could popular smart home features be translated to vehicles, and how could they integrate more to make consumers' lives easier?
- What are some ways to make home charging stations more accessible, affordable, and easier to install?
- What can we learn from Smart Home systems about comfort, climate control, and personalization that could translate to vehicles?

- Instead of waiting for dashboard warning lights, smart cars could predict issues before they happen—scheduling service automatically or even ordering replacement parts when needed, just like how a smart fridge can detect when you're low on groceries.
- Instead of glancing down at a GPS, AR windshields could overlay directions, hazard warnings, or even highlight parking availability in real-time, improving safety and convenience.
- EVs could coordinate with home energy systems to charge at the most cost-effective time, integrate with solar panels, or even return power to the home during peak hours—turning vehicles into mobile energy assets.



SPARK PLUG

CAR RENTALS & FLEXIBLE OWNERSHIP MODELS

“Flexible ownership models for vehicles are growing more and more popular across Europe...”

[writes Roland Berger in a recent study.](#)

Also known as Car-as-a-Service (CaaS) models, they are part of the larger trend toward “no worries” usage models seen across many industries. Many factors draw today’s consumers to such models. The relatively recent emergence of electric vehicles of various types (EVs) has created uncertainty about which car technology will ultimately win out.

This makes some potential purchasers reluctant to own an expensive asset that might rapidly depreciate.

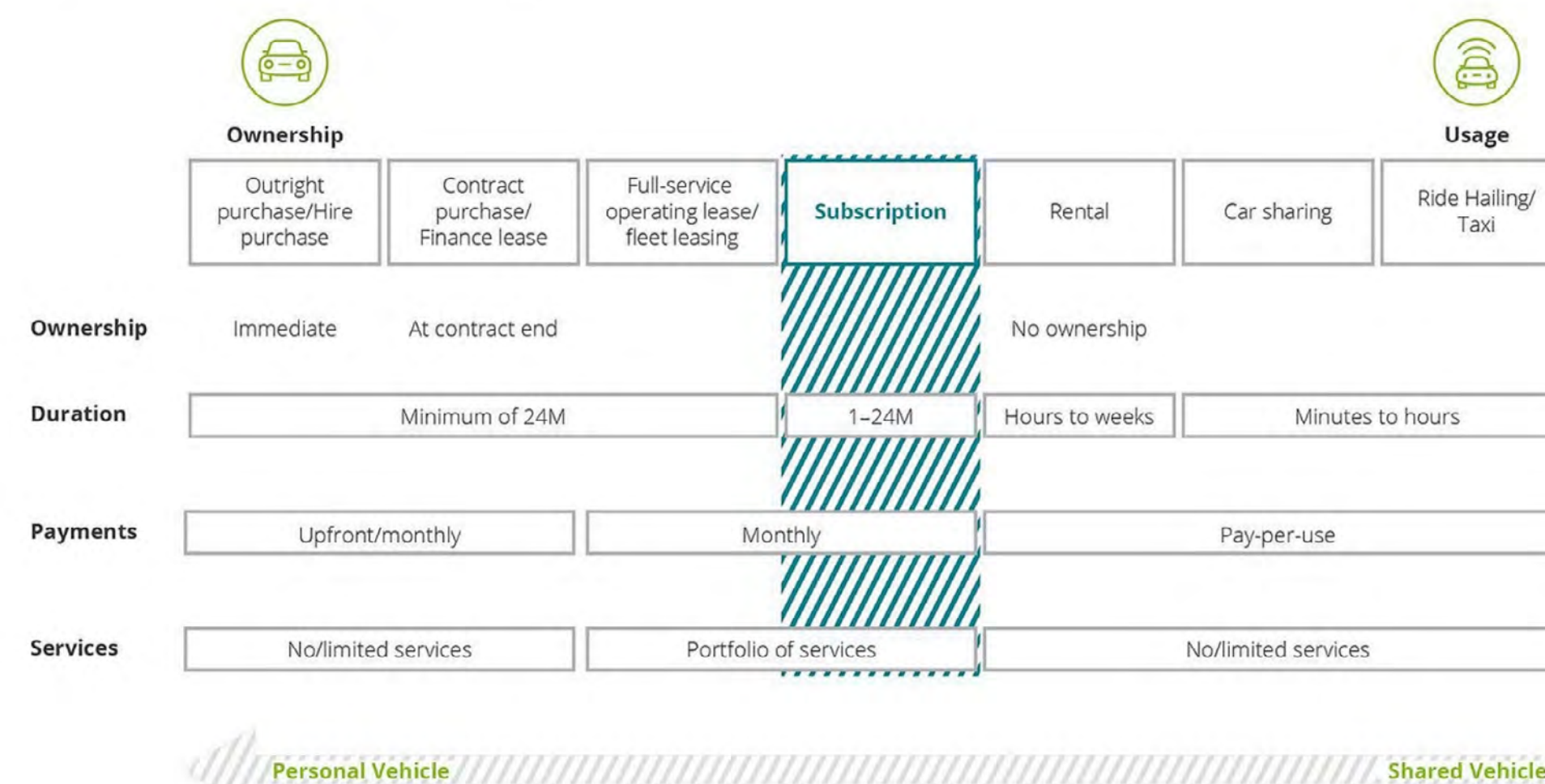
To meet evolving consumer preferences, rental companies are offering flexible options such as subscriptions, flexible leases, and car-sharing services. These models cater to customers seeking alternatives to traditional car ownership, providing access to vehicles without long-term commitments.

Car manufacturers and dealerships could consider implementing this model in their services as a new revenue stream.

Another model gaining traction in the automotive industry is certified pre-owned (CPO). Unlike traditional used car lots or third-party inspections from companies like CarMax, CPO vehicles undergo rigorous manufacturer-backed inspections and reconditioning. This approach addresses many consumer concerns about buying new, offering a more affordable option that retains value better while still providing a multi-year warranty—often with added perks like maintenance plans. Dealerships also benefit from increased customer retention, as buyers are more likely to return to exchange their CPO vehicle for a newer model.

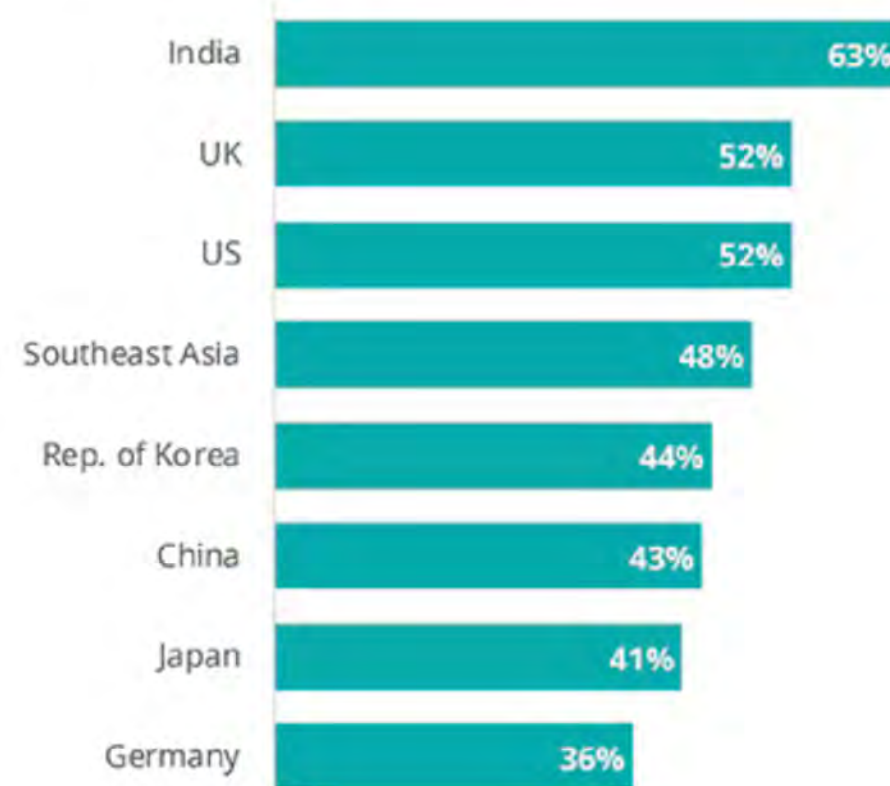
As demand for affordability and reliability grows, CPO programs are poised to play an even greater role in shaping the future of car buying.

Fig. 4 – Vehicle-based mobility product portfolio

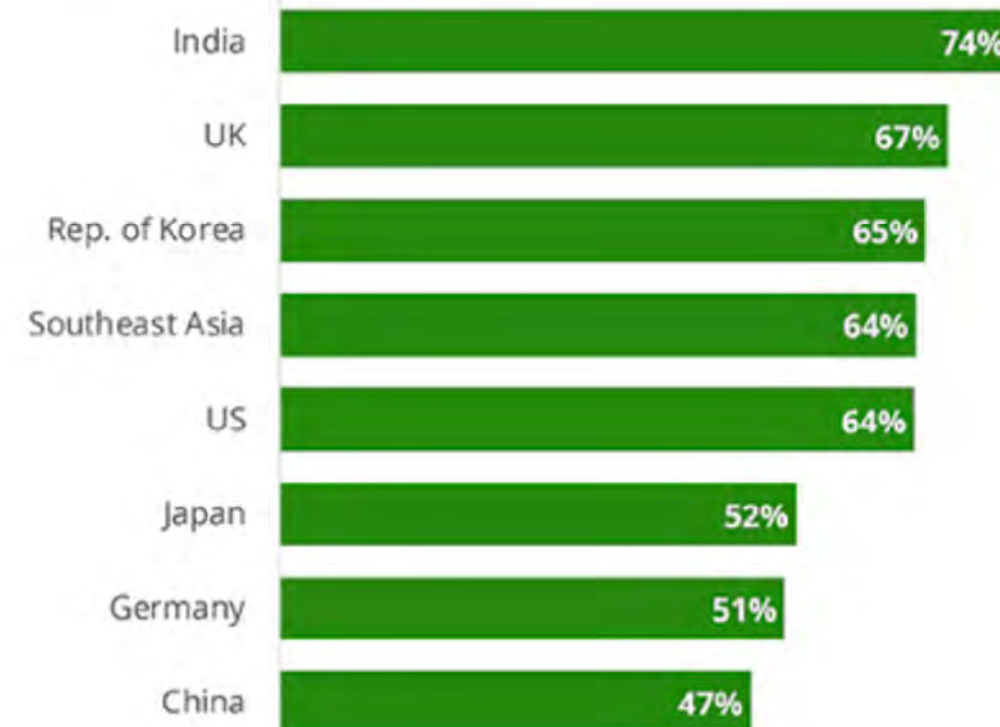


Consumers surveyed in both India and the United Kingdom are more concerned with the idea of an autonomous vehicle fleet when compared to surveyed consumers in Germany, Japan, or China.

Percentage of consumers concerned about **fully autonomous robotaxi services** operating where they live



Percentage of consumers concerned about **commercial vehicles operating in a fully autonomous mode** on the highway



Q56. To what extent are you concerned with each of the following scenarios?
 Sample size: n = 939 [China]; 1,306 [Germany]; 882 [India]; 637 [Japan]; 906 [Republic of Korea]; 5,028 [Southeast Asia]; 1,314 [UK]; 937 [US]

Although their numbers are on the rise, with some cities adopting their use for ride-sharing and public transport, the 2025 Deloitte study shows that overall, adoption of autonomous vehicles is slow due to concerns about consumers' safety and reliability.

Still, that doesn't mean auto brands should give up on them or the data that can be gleaned from AV experiments.



DRIVER'S ED mini workshop

What Can We Learn from Autonomous Vehicles Even If They're Not Seeing Widespread Success?

THE CHALLENGE

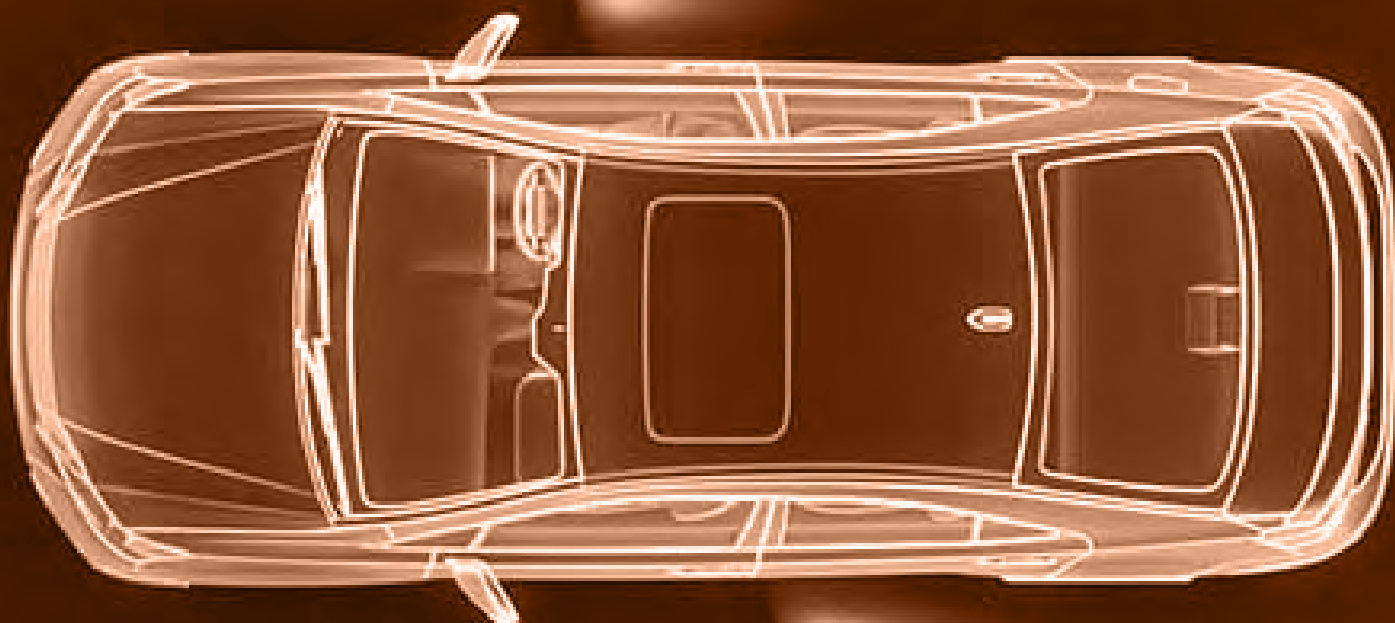
Although they create buzz in the media (not always for good reasons), autonomous vehicles haven't made the splash with consumers that some manufacturers had hoped for by 2025. Should plans for AVs be considered a total waste, or can we learn from them and use insights and data collected to improve other parts of a car brand or its products?

YOUR ASSIGNMENT

Consider the autonomous vehicle thus far as a lesson for car brands in how to walk the line between R&D and innovation investment. How can you secure short-term ROI by investing in technologies consumers are ready for, but still be seen as future-forward?

STRATEGIZE

What aspects of AVs could you utilize in your brand's offerings, without fully going autonomous? For example: Advanced driver assistance systems (ADAS) with pedestrian detection and avoidance, as well as automatic emergency braking, may soon be required on all new cars sold in the United States.



Public transportation is becoming more popular than ever. The Federal Transit Administration ([Transit.gov](https://www.transit.gov)) reported in January 2025 that transit agencies provided 6.9 billion trips—an increase of 17.3% from 2022.

Those same transit agencies moved passengers 35 billion miles, an increase of almost 17% from 2022. (That distance is the equivalent of driving to Pluto and back more than four times!) With that year-over-year growth, public transportation grew nearly twice as fast as domestic air travel between 2022 and 2023, the most recent year national transit reports were recorded.

Just as personal vehicle trends have shown, public transit is also trending toward electric, with sustainability and environmental protection cited as its main reasons.

PUBLIC TRANSPORTATION

WHOOSH

One example of electric public transit being adopted in the US is [the new "Whoosh" rail system in Houston](#). Sugar Land and Swyft Cities, a provider of urban mobility systems, entered an agreement to study bringing a transportation system called Whoosh to the Houston region.

The new gondola-based transportation system could provide stops to Sugar Land Town Square, Smart Financial Centre, and other destinations. City officials have discussed building the self-driving elevated cable and rail system, which is set to be completed in two to three years (and might remind some readers of the [Disney Skyliner](#)).



How can car brands learn from public transit trends?

partnership with public systems

Transit.gov reports that such high-capacity transit systems like light rail and bus rapid transit (BRT) increased substantially between 2013 and 2023. Transit rail miles increased by 12%, and miles traveled via BRT gained 44%, the largest increase among transit modes.

The increase reflects the introduction of several new BRT systems. Car brands could work with light rail and BRTs to produce vehicles or technologies for public systems.

environmentally friendly systems

While transit is already an environmentally friendly way to travel, many of the nation's transit providers are transitioning to greener propulsion systems, particularly for buses.

The report, which also analyzes trends over the last decade, found that between 2013 and 2023, the number of zero-emission buses increased four-fold.

accessibility & inclusion

The report also shows a significant increase in improving accessibility for people with disabilities. In 2023, nearly 84% of the nation's transit stations were considered fully accessible per the Americans with Disabilities Act—stations that include modifications such as platforms for level boarding and ramps—an increase of 4.6% over the last decade.

MOTORCYCLE TRENDS



The two-wheeled auto industry is seeing many of the same trends as its mainstream, more traditional car manufacturers.

Motorcycles, for many, have always represented freedom, independence, and a lust for life and adventure.

So, how does that consumer mindset and the lifestyle of motorcycle ownership fit in with current trends?

ELECTRIFICATION

A market report by [Grand View Research](#) says the global electric motorcycle market size is worth USD 30.11 billion in 2022 and is anticipated to grow at a compound annual growth rate (CAGR) of 19.0% from 2023 to 2030. It also outlines the benefits of electric motorcycles that are driving more consumers, including:

- There is a growing environmental consciousness from consumers and a demand for more corporate social responsibility among brands.
- Advancements in battery technology and charging infrastructure make owning an EV more convenient than ever.
- Electric motorcycles are now capable of impressive performance and range, making them a viable option for both commuting and recreational riding.
- Major Players Entering the Market: Established motorcycle manufacturers like Harley-Davidson (with their LiveWire line) are investing heavily in electric models, and new electric-only brands like Zero Motorcycles are gaining traction.
- Electric motorcycles are becoming more accessible thanks to rebates being offered by certain states promoting sustainability, as seen in this ["State-by-State Guide to Electric and Eco-Friendly Motorcycle Incentives"](#) by CycleTrader.



Technology Integration



The integration of smart technology will continue to revolutionize the riding experience, [says CycleTrader](#).

Features such as Bluetooth connectivity, navigation systems, and smartphone integration are now standard.

Riders can expect advancements in heads-up displays (HUDs) and voice-command systems, which will make it easier to access information while on the road.



Safety

This will remain a priority in the motorcycle industry. In fact, new advancements are making riding safer than ever.

From improved helmet designs with built-in communication systems to airbag-equipped riding gear, manufacturers are constantly improving rider protection.

Additionally, some rider training programs are incorporating virtual reality simulations to help work on skills in a controlled environment. This may become standard training in the future.

Nostalgia & Aesthetics

Consumers want to look cool, especially on their motorcycles. Similar to the Porsche x Aimé Leon Dore collaboration we discussed earlier, CycleTrader reports that while modern technology is driving innovation, vintage aesthetics will continue to be valued and sought after.

Retro-inspired motorcycles will continue to dominate showrooms. From cafe racers to scramblers, manufacturers are catering to riders who love the nostalgic look but want modern handling. Expect more models with customizable options that allow riders to add a personal touch to their machines.



CUSTOMIZATION

Unique looks and personalization lend an air of exclusivity, luxury, and pride to vehicle owners.

Motorcyclists have historically been some of the most creative when it comes to custom bikes, pinstriping, and other modifications, perhaps leading the car industry in such endeavors.

Kamax Group recognized this in their list of [2025 trends](#), reporting customization is booming, with riders modifying their motorcycles to reflect their unique styles.

Major manufacturers have recognized this trend and now offer factory-custom models that allow riders to tweak their bikes straight from the showroom or website.

DRIVER'S ED mini workshop

*Never Stop Improving & Always
Consider the Human Factor*

THE CHALLENGE

You can have the top-selling consumer vehicle in the market, but if you aren't moving forward, you will get left behind when the competition does. You must also always think of the customer as a human, not a statistic or a hypothetical. How can you show the people you care and that your brand's goal is to improve their lives with your product or services?

YOUR ASSIGNMENT

Make a list of what you see as the top innovations in driver and passenger comfort in the last decade (remote start, heated seats, seat position memory, etc.). Now make a list of comforts you would like to see added to your car or ways to improve upon the ones you listed. Make a third list of annoyances or disadvantages of your car.

STRATEGIZE

How many of the improvements could you implement into a product line? What would the impact be on your consumers if you could make every improvement? How can you communicate this goal with them and ask for their feedback, then keep the dialogue going throughout the customer journey?

How can we take data about car owners or potential customers and apply them to your marketing strategy?

- Does your brand have an opportunity to extend your offerings to consumers beyond the sale of the car?
- Owners see their vehicles as an extension of themselves. How can we make it more convenient, cooler, more fun, or more appealing to own a personal vehicle, and how do we remind consumers of the benefits?
- How do brands foster customer loyalty through better communication, simplification, collaboration, and rewards?
- How can you bundle services or products to better meet consumer needs?
- Pivoting into more: How would we take your product and expand your brand into adjacent sectors through technology or new products and experiences?
- How can we better target your core audiences and anticipate their needs?
- **Social commerce: Selling on social media platforms is important.** Travel content accounts for a great percentage of posts across social media, with travel-related hashtags on Instagram garnering over 1 billion posts. Could your brand take advantage of this by asking for sharing and user-generated content related to their mode of transportation?

ABOUT

ANTONIO & PARIS

*Global brand innovation
& design studio.*

We transform leading brands into icons
and startups into leaders.

We assist businesses at critical parts of
their growth journey to define, design,
and build incredible experiences for
their audiences that result in increased
shareholder wealth.

ABOUT

ANTONIO & PARIS

Brand Strategies That Work

From collecting data from your target consumer market to predicting strategies that will become invaluable for the future of your brand, the tools and methods developed by our team can help you innovate, disrupt the status quo, gain equity, deliver kickass creative content, and build consumer loyalty.

White-Glove Branding

Our team of proven strategic experts creates short- and long-term company strategies that spark brand loyalty through meaningful consumer interactions and experiences.

We treat your brand as if it were our own, every step of the way.

Competitive Market Landscape Analysis

We conduct in-depth client-centric research to understand the complex nature of your industry and the individuals in your audience, then delve into that research to develop a brand strategy with a cohesive message that will drive results.

Expansion Opportunities

Using proprietary technology as well as face to face interactions, we conduct voice-of-the-consumer research to find expansion opportunities and identify industry developments that will benefit your organization so that you can plan ahead.



How? Our Proprietary Tools

PlayGround Sessions

This qualitative tool is designed to help brands understand the intricacies of the intersection between the practical and emotional drivers consumers need to engage with them. These three-hour sessions are based on Dr. Clotilde Rapaille's theory that everyone processes decisions based on the Reptilian Brain.

This research focuses our instincts of attraction and survival, governing emotions (i.e. love and hate), and practical intelligence, including rationalization (price and money).

Project: Follow Me

Project: Follow Me is a modern-day real-time ethnography that utilizes digital tools to gain insight into the actions and behaviors of consumers. Participants are asked to engage with brands in the moment and respond to requests, homework assignments, and more.

They are able to share photos, videos, and digital diaries to provide brands with a real-world snapshot of their buying/engagement journey.

Voices Across the World

Sometimes there is the need to hit the road and live with and observe your target audience in a more intimate way. VXW is a documentary we produce for brands that highlight specific consumer needs in their day-to-day lives. It ends with actionable insights on how the brand can deliver and delight.

Our award-winning documentary filmmakers provide unique storytelling to illuminate needs and desires brands can use to ignite a love affair with consumers.

Moxie Days

Our "Moxie Days" are meant to help brands identify everyday conventions in their category and then move to disrupt those conventions with the goal of creating significant differentiated space to drive revenue and loyalty. This unique process is meant to identify and solve key business challenges that include marketing, operations, customer service, finance, and more.



Historically, AT&T built products and messaging based on what they wanted to do and say. We began implementing PlayGround Sessions to identify consumers' emotional and practical needs.

We also developed unique personas—particularly within the Millennial and Gen Z segments—to better highlight how AT&T's products and services mirrored their lifestyles and expectations. Additionally, we conducted a Drivers Study that utilized consumer feedback to prioritize the most effective and efficient marketing messages.

As part of this initiative, we played a key role in developing AT&T's first Consumer App, designed to engage a younger audience and enhance brand interaction. All of the above not only helped to increase sales but also significantly strengthened brand equity.



From a competitive perspective, MINI utilized a typical segmentation of consumers to sell cars. Most of the category focused on practical drivers (intellectual alibis) such as MPG, size of vehicle, etc. This resulted in a commoditization of the category.

A&P recommended and implemented a segmentation based on an emotional need that focused on "individuality" and a "rebellious nature."

This was not an exercise in segment demographics but based on the unique aspect of emotional needs which could then be transferred to the product.

This differentiation still holds true today.

A&P Case Studies

ANTONIO & PARIS

