UpShift

2025 Automotive Marketing Survey

October 2025

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UpShift

About UpShift

Introduction

Part of the wider **Evolved group**, **UpShift** is a specialised search agency that focuses on building **long-term partnerships** with businesses in the automotive sector.

With a **proven track record of success**, **UpShift** has helped a variety of companies across many sub-sectors in the automotive industry, and has built long-term partnerships with **specialist and global brands**.

Capabilities

- SEO
- STRATEGY DEVELOPMENT
- PAID SEARCH
- DIGITAL PR & OUTREACH
- CUSTOMER INSIGHTS & CRO
- AI STRATEGY
- BRAND CONSULTANCY

Who we work with

BYD
STELLANTIS
SELECT CAR LEASING
GRIDSERVE SUSTAINABLE ENERGY
vanarama
LeasingOptions
NEXTBASE
Peter Vardy YOUR CAR COMPANY
loveelectric
ClickMechanic
motoreasy

CHALLENGES WE SOLVE	OPPORTUNITIES WE REALISE
Reducing reliance on marketing cost by offsetting pain channels and security commercial sustainability	Developing and executing brand propositions and market positioning that underpin performance
Recovering stagnant and/or eroding performance	Data transformation to understand a true ROI, reduce waste, and maximise investment
Provide expert consultancy, insight, and reporting to assist with board and key investor decisions	Developing, executing, and managing marketing strategies that align with key commercial business objectives
Navigating changing industry / market economics by streamlining marketing strategies	Increasing ecommerce sales or generating new leads through marketing optimisation
Challenging industry competitors	Launching a new brand, product or service online
Website migration management / recovery	Upskilling and training inhouse teams to realise marketing potential

Introduction

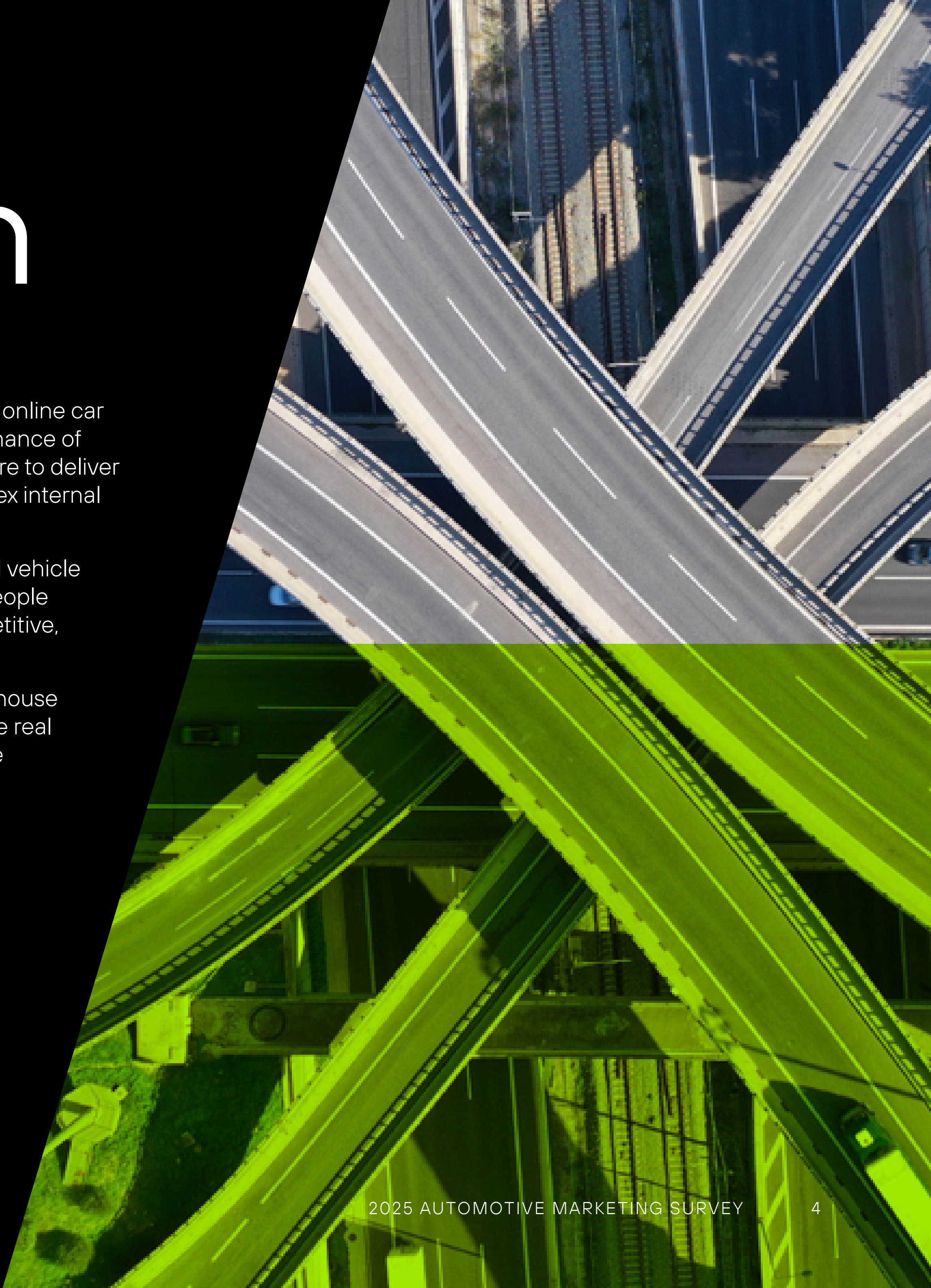
The automotive sector is at a crossroads.

Consumer behaviour is shifting faster than ever, shaped by the rapid shift to online car buying, the acceleration of electric vehicle adoption, and the growing dominance of aggregator platforms. At the same time, brands are under increasing pressure to deliver measurable results, often while navigating tighter budgets and more complex internal demands.

Yet while the industry has no shortage of reports on consumer attitudes and vehicle sales trends, there has been little focus on the marketers themselves, the people inside automotive brands tasked with driving digital growth in such a competitive, fast-changing landscape.

That's why UpShift set out to capture their perspective. We surveyed 50 in-house automotive marketers, spanning a mix of roles and seniorities, to uncover the real challenges they face, the opportunities they see, and where they believe the industry is heading.

This whitepaper brings together their insights with UpShift's own analysis, providing a benchmark for in-house teams as we fast approach 2026. Whether you're managing performance marketing, overseeing digital strategy, or shaping brand growth, we believe these findings will spark new thinking, highlight shared challenges, and ultimately help you move forward with greater confidence.



Our Process

To ensure this whitepaper reflects the realities of automotive marketing today, we designed a simple but comprehensive research process:

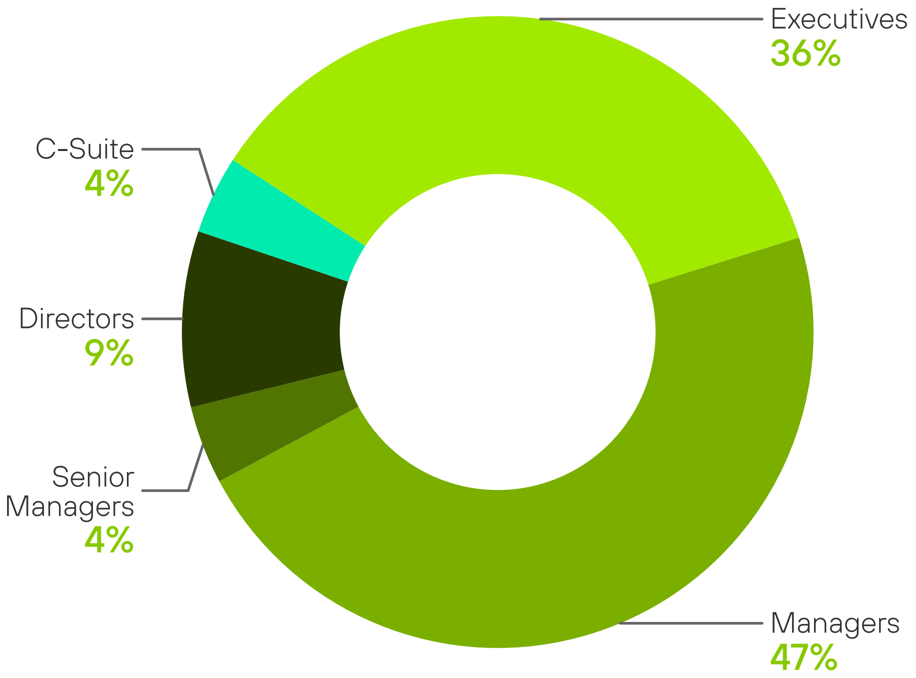
- We created an online survey (accessible here) to capture insights directly.
- The survey was shared widely with our contacts in the sector and amplified across social media channels.
- To analyse the results, we leveraged AI to provide objective and data-driven analysis

This approach allowed us to combine the expertise of industry insiders with the clarity of advanced data analysis.

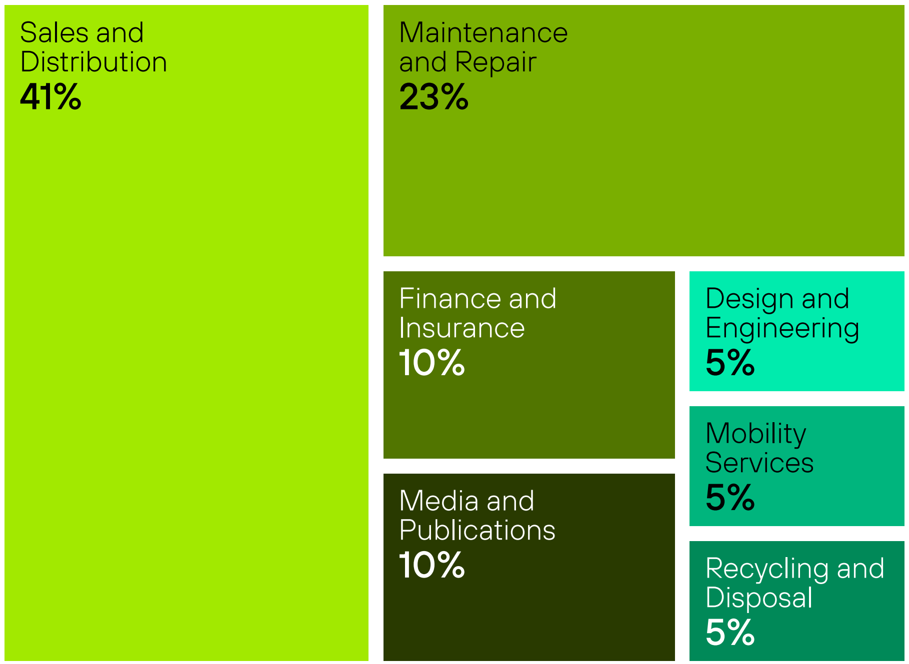
Who Took Part

A total of 50 professionals from across the automotive industry contributed to this survey. Respondents came from a broad cross-section of roles, company sizes and subsectors, giving a diverse view of the challenges and opportunities facing automotive marketing in 2025.

Seniority of Participants



Sectors of Participants



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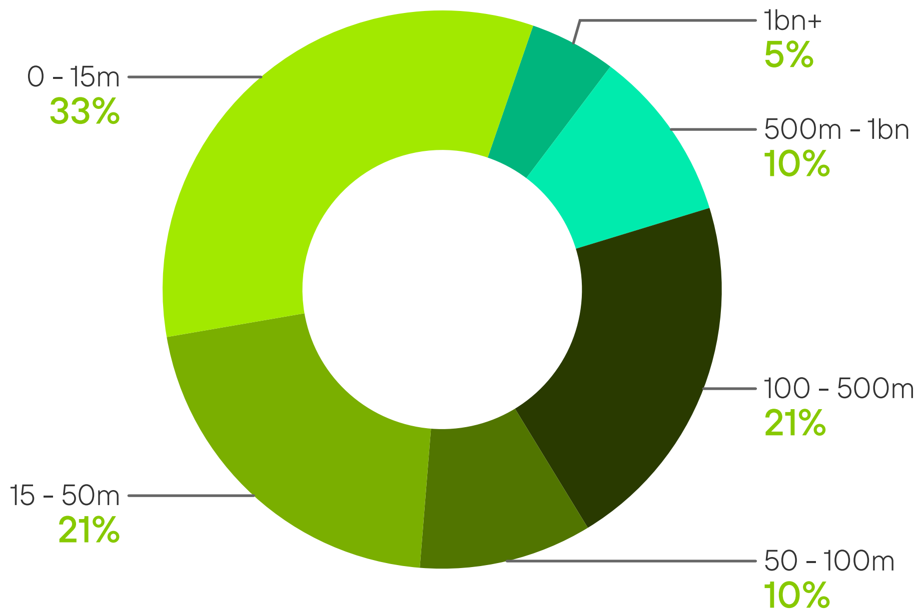
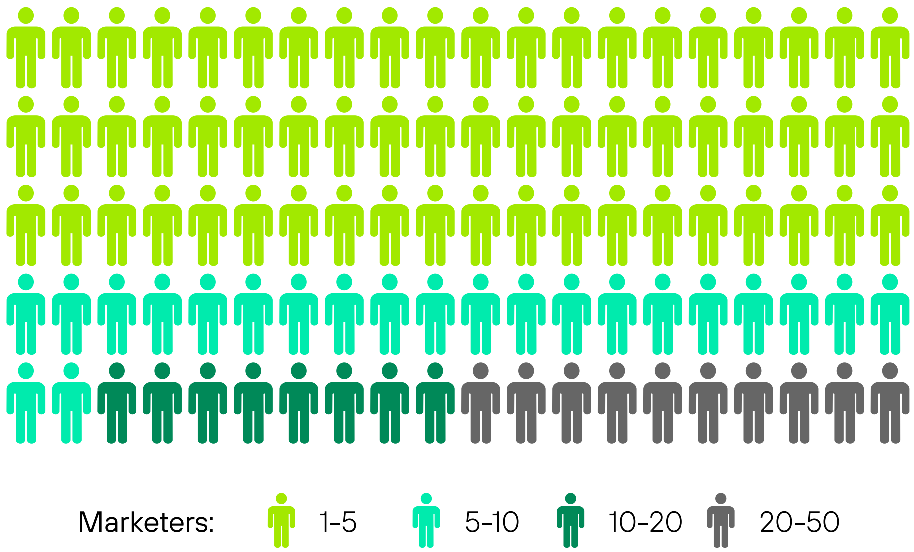
Organisation Annual Revenue



Size of Marketing Teams



Executive Summary

The results of our H2 2025 Automotive Marketing Survey highlights a sector under pressure but also full of opportunity.

Across those surveyed, a consistent picture emerges: marketing teams are lean, budgets are tight, and expectations are high.

Measurement and data sit at the core of the industry's challenges. Proving ROI, fixing attribution, and turning data into action are the top pain points, heightened by limited resources and gaps in strategy.

Spend is digital first. Most investment goes into Paid Search, Social, Email and SEO; while brand building is undervalued, with cuts this year coming from activities such as TV and display.

Goals are growth led. Marketers need more leads and sales, stronger brands and better conversions through improved onsite experience - a shift from pure acquisition to full funnel performance.

AI is the defining trend shaping the year. Both machine learning and generative AI were widely cited as trending topics, alongside growing interest in video content and marketing automation.

In summary, 2025 demands clarity, focus and data based execution.

The winners will refine their measurement, rebalance their channel mix, leverage AI, and partner with specialists who truly understand the sector.

THOSE WHO ACT DECISIVELY AND EMBRACE CHANGE WILL BE BEST PLACED TO TURN TODAY'S CHALLENGES INTO TOMORROW'S COMPETITIVE ADVANTAGE.

Introduction to Results

The survey findings are presented in four sections, each designed to build a complete picture of how automotive businesses are approaching marketing in 2025.

1. Marketing Strategies

This section covers how teams are currently planning, where confidence in strategies sits, and why ROI/attribution remains the number-one blocker.

2. Marketing Investment

Here we look at where budgets are allocated now and moving forward, and what marketers expect from agencies.

3. Trends & Expertise

Next, we look at how AI, automation and video are being applied in practice, and why industry expertise is non-negotiable.

4. Future Objectives

Finally we look at future priorities for teams, the obstacles in the way, and how to close the gap.

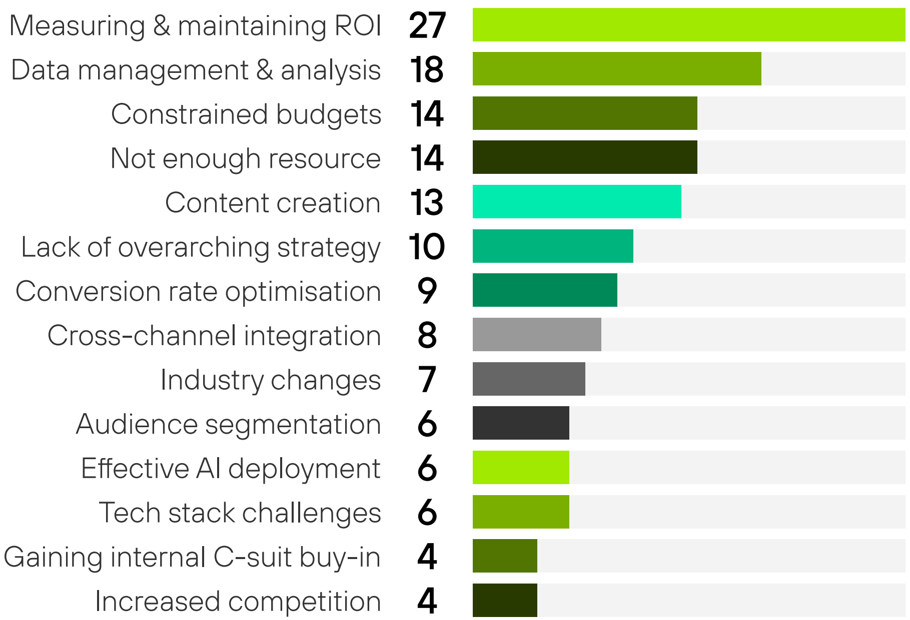
Marketing Strategies

Strategy & Measurement Are Still Holding Marketers Back

UpShift

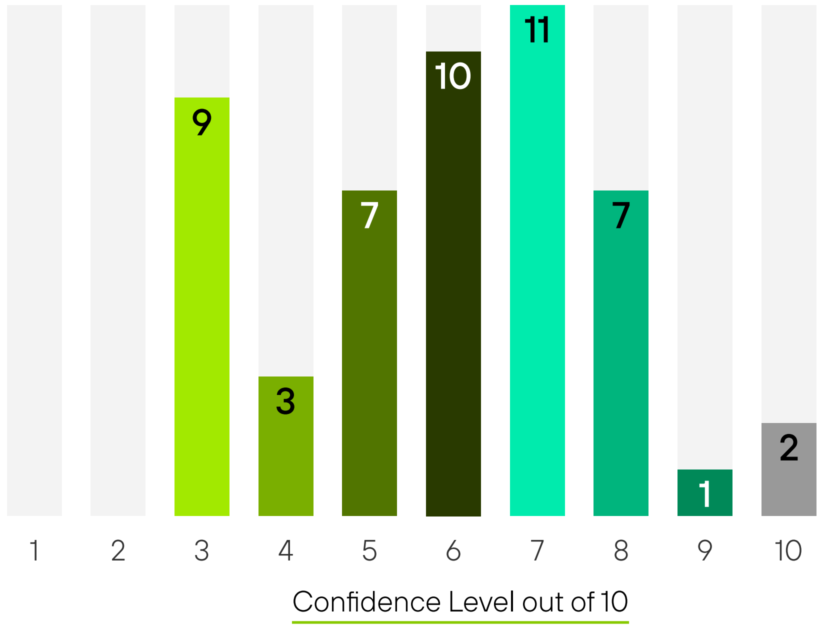
Marketing Strategies

Top Marketing Challenges



Top challenge: "Accurately measuring and maintaining ROI" - cited most frequently by respondents.

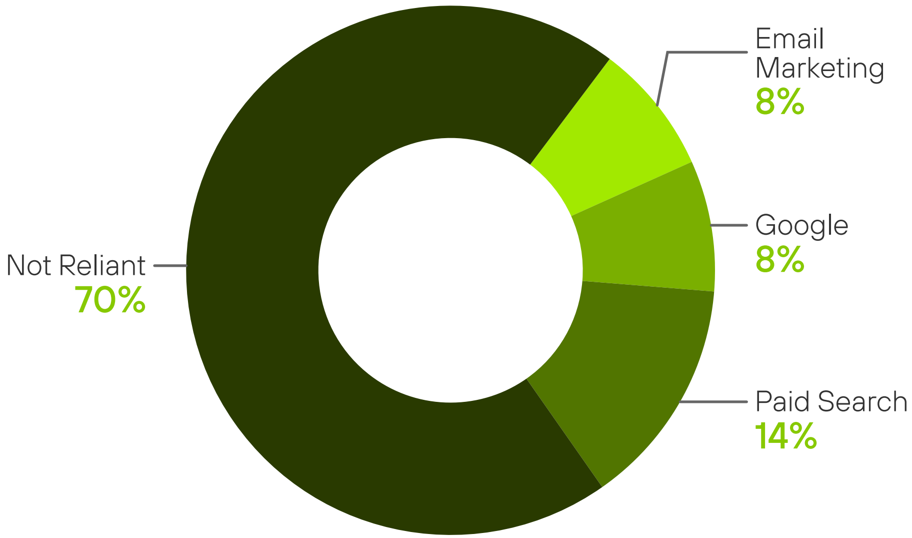
Confidence in Your Org's ROI Quantification



Avg. confidence rating in marketing strategy & ROI measurement: **6/10**

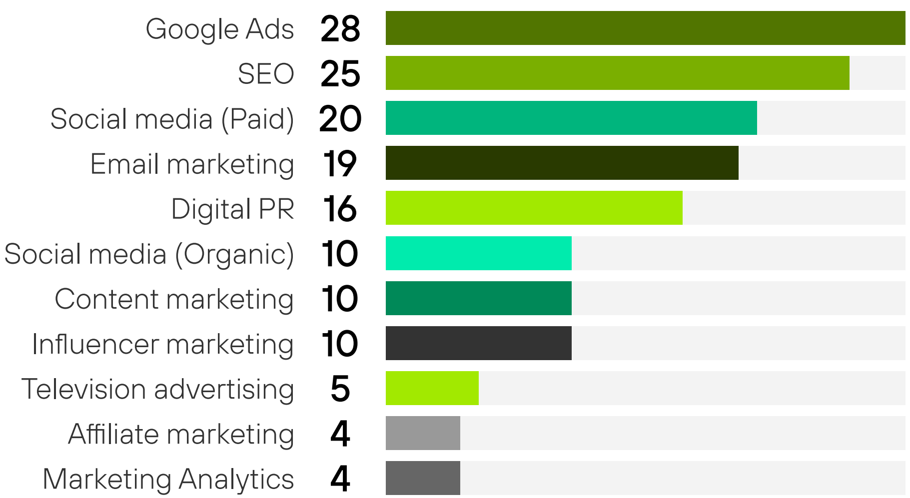
Marketing Strategies

Reliance on a Particular Marketing Channel



70% said they are not overly reliant on a single channel, **but 30% admitted they are**, with Paid Search (Google Ads) being the most common.

Which 3 areas of digital marketing are likely to be most invested in over the next 12 months?



Marketing Strategies

What This Tells Us

Many automotive marketers are still struggling to tie performance back to business outcomes. With an average confidence score of just 6 out of 10, it's clear that attribution, clarity, and strategic alignment remain unattainable.

The fact that ROI measurement is the number one pain point reinforces this, marketers are making decisions without all the facts.

While 70% say they're not overly reliant on a single channel, this figure should be taken with caution. It is likely that many brands are reliant without knowing it, particularly on paid search and branded search, due to weak attribution and a lack of channel diversification. During the survey we asked where marketers are most likely to invest budgets over the next 12 months, and unsurprisingly, Google Ads (paid search) was the overwhelming response.

Implication for In-House Marketers

Without a robust measurement protocol, in-house marketers are limited in their ability to make confident decisions around budget allocation, prove ROI, or scale their campaigns sustainably.

The risk isn't just inefficiency, it's stagnation. Channel overreliance also leaves brands vulnerable to platform shifts, cost inflation, or algorithm changes

Marketing Strategies

Insight

ROI isn't just about reporting; **it's about direction**. Without a shared definition of success and how it's measured, even well-executed campaigns drift off course.

We believe the cause of the attribution issue can be split into 3:

- Technical setup (ability to collect and attribute).
- Data accuracy (quality and completeness).
- KPI alignment (are we optimising to the right outcomes?).

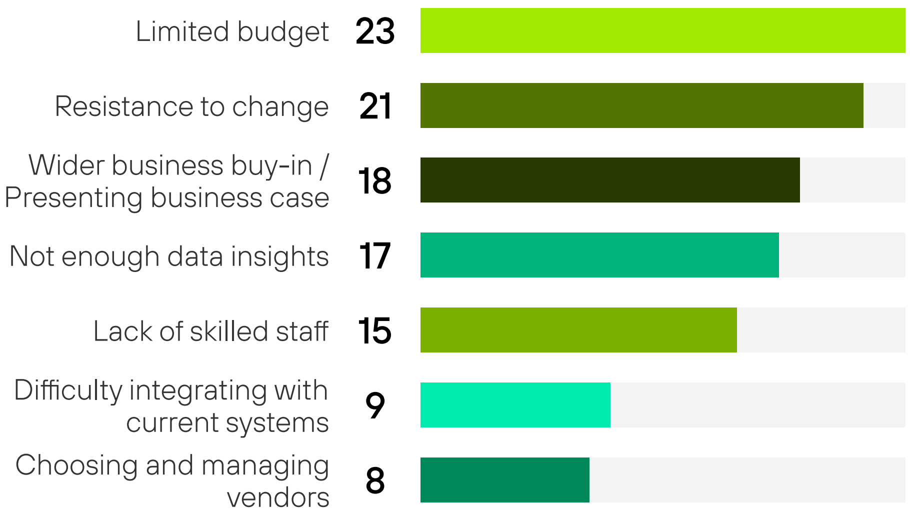
The hard truth: most organisations can't fully solve (1) and (2) with their current stack. They lack the technical infrastructure and are constrained by how even reputable platforms collect data. Fixing this often requires building and integrating new systems, and rethinking how results are measured and communicated across the organisation.

CHANGE IS THE CHALLENGE.

This is further backed by our survey. When asked 'what are the biggest obstacles you face in implementing new marketing technologies?', limited resources were voted the highest challenge however, resistance to change and wider business buy-in came second and third, respectively.

On (3), how KPIs are defined and used can distract from real performance. Teams end up optimising to the metric rather than the outcome, creating noise and misalignment.

What are the biggest obstacles you face in implementing new marketing technologies?



Marketing Strategies

Key takeaways

If you do not invest in your ability to track and measure your business performance and marketing activity, you are most likely wasting your budget.

Your impact can compound when you understand how different data sets influence and correlate with one another.

With too many KPIs, significant resources can be misallocated to goals that are only loosely linked to core business metrics.

Similarly, focusing too heavily on specific KPIs and performance metrics can distract from the real customer pain points or growth areas that will make the most significant difference.

For business owners and senior management

Avoiding change is costly. Sticking with legacy systems and thinking will cost you more each year.

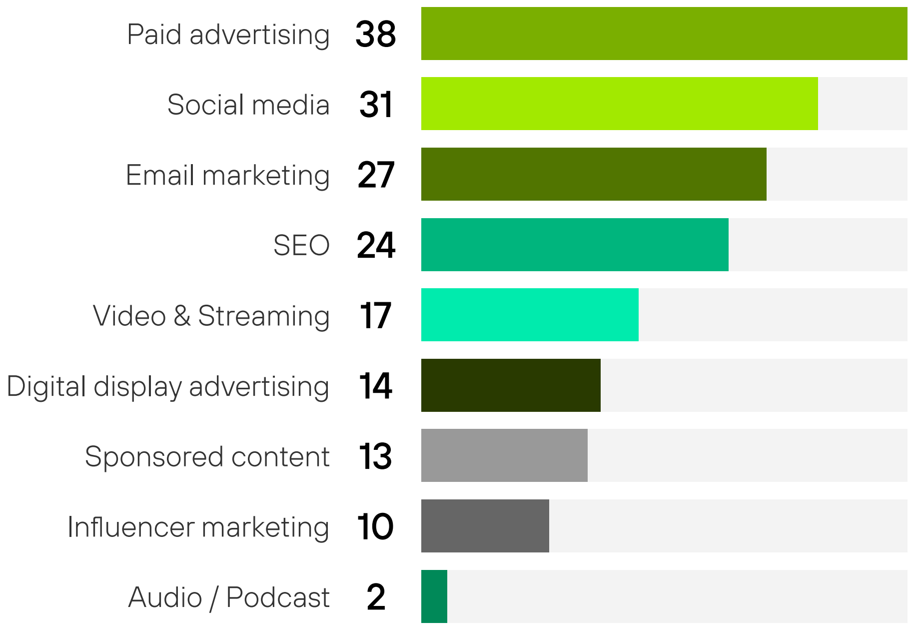
Own your data.
How it's collected, attributed, and analysed must be understood by all stakeholders internally - failure to do so impedes necessary change and can result in less effective decision making.

Marketing Investment

Investment Priorities Signal Performance Bias

Marketing Investment

Channel Investment Share



Key Points

- Paid advertising leads with 22% of total investment share
- Followed by social media (18%), email (15%), and SEO (14%)
- 62% of marketers currently work with agencies

Top agency traits ranked by marketers:

- Transparency & communication
- Expertise & specialisation
- Understanding of your business & industry

Marketing Investment

What This Tells Us

Investment is heavily weighted toward performance based, conversion channels. While these deliver immediate returns, upper-funnel, brand-building activities remain undervalued and underinvested in. That will limit long-term visibility, trust, and growth.

Agency usage is high, yet basic issues persist. The recurring theme is a lack of trust driven by poor communication and delayed, misaligned deliverables.

As one **Head of Marketing** put it:

'If something isn't working, we want to know. We don't just want to know the good stuff. In a way, that's actually less important.'

A second, consistent challenge is deeper sector understanding and metric alignment: 'Getting them to understand broader business context and metrics such as net revenue rather than just driving traffic or onsite conversions.'

Implication for In-House Marketers

Relying too heavily on paid search may achieve short-term wins at the expense of sustainable growth and will cause a strain on budgets, especially with rising CPCs and tightening ROI. With competition focused on a fixed pool of demand, brands risk higher costs, lower efficiency, and limited growth unless they invest in upper-funnel activity to build awareness and affinity.

And if you're outsourcing, choosing a partner without transparency, focus, or the ability to execute fast and well will only increase those risks.

Marketing Investment

Insight

Of course, sales-driven (bottom-funnel) activity is non-negotiable; however, the urgent need for revenue and tighter budgets is pulling attention away from other priorities. We're increasingly seeing that brand building and awareness (top-of-funnel) directly affect bottom-funnel performance.

Sustainable growth comes from balance: elevating upper-funnel activity not only for awareness, but because brand strength compounds over time and cushions volatility in paid channels.

MOST BRANDS ARE UNDER-INVESTING IN WHAT ACTUALLY BUILDS RESILIENCE, DIFFERENTIATION, AND LONG-TERM DEMAND.

Focusing too heavily on bottom-funnel conversion channels can lead businesses to over-optimise around short-term sales metrics while overlooking the wider influences that drive purchase decisions.

The Evidence is Overwhelming

"Brand differentiation is more important than ever"

Google Automotive Insights Google

"Brand matters more than anything else... Build a notable, popular, well-recognised brand in your space."

Rand Fishkin SparkToro

"Modern SEO is about developing a cohesive brand identity and implementing a content strategy that genuinely serves your target audience across the web."

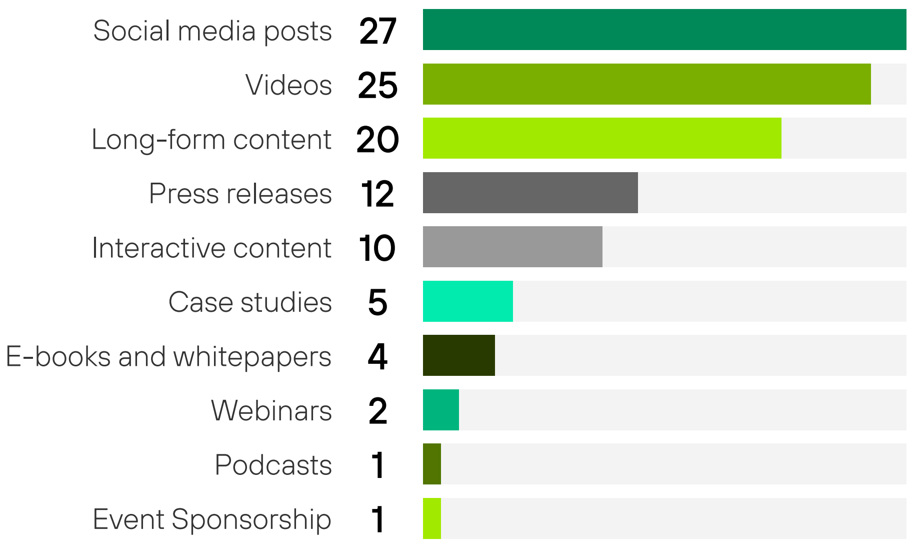
Jason Barnard Search Engine Land

"To connect with potential customers who aren't in the market yet, you need to play the long game. Build brand awareness. Create positive associations. Predispose them to choose you when they are ready to buy."

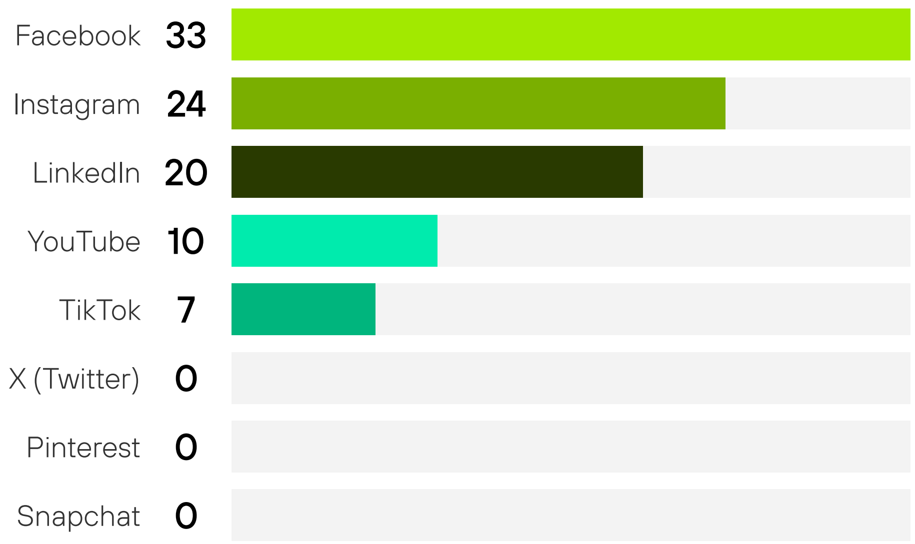
Mark Ritson Think with Google

Marketing Investment

What kind of digital content has been most effective in helping increase brand awareness?



Which social media platforms do you find most effective for your marketing efforts?



Among respondents investing in brand, social media and video were seen as the most transformative for awareness, with 27 and 25 mentions respectively. Facebook was cited as the single most effective platform for marketing impact.

When asked what competitors do better, social media topped the list, followed by content creation and video, closely related capabilities that reinforce each other.

Marketing Investment

AND WHEN IT COMES TO WORKING WITH AN AGENCY, WHAT SHOULD YOU LOOK FOR?

A specialist

100% of marketers said industry expertise matters in agency selection - 60% called it imperative.

Pick a partner with genuine automotive expertise - one that understands your brand and speaks your language, both in terms of automotive and commercially. You care about pounds and pence, so should your agency,

They come highly recommended

Ask peers in the industry who they work with and request references you can speak to from the agency.

An experienced delivery team

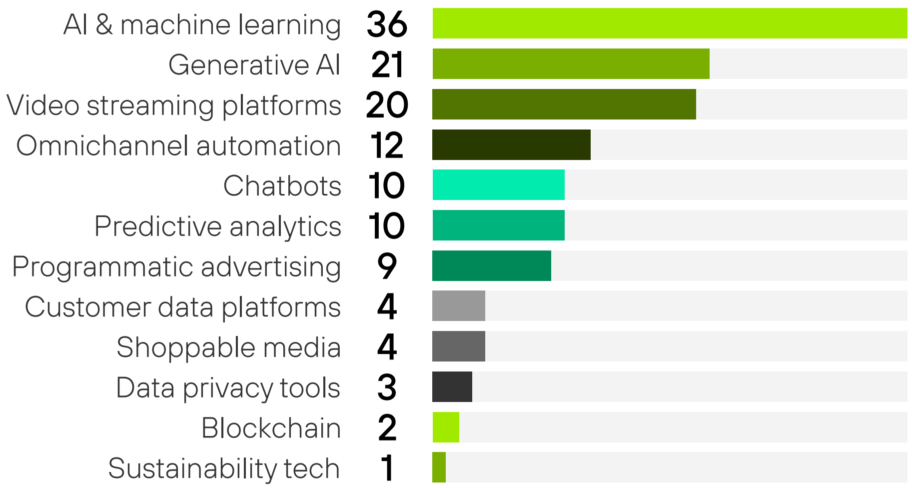
During the pitch, meet the people who will actually run your account and clarify their roles and experience. It can be hard at that stage to judge how well they'll communicate and deliver, but this helps avoid the classic "seniors sell; juniors deliver" scenario and gives confidence that you'll have a capable team with a track record.

Trends & Expertise

The Smart Tech Surge & the Specialism Gap

Trends & Expertise

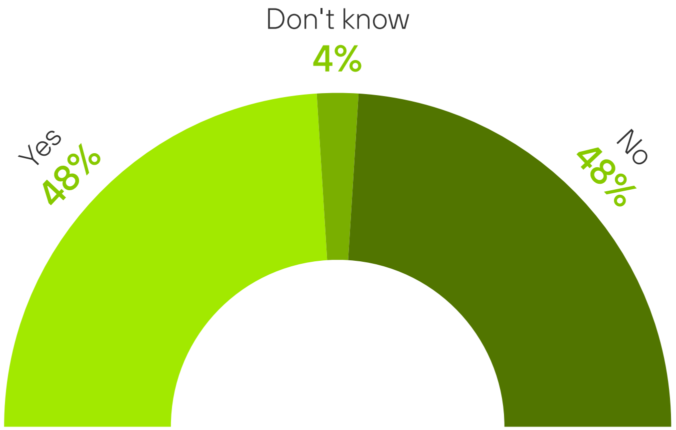
What channel is your company most interested in exploring?



What This Tells Us

AI is no longer experimental; it's actively being integrated into marketing workflows. But it's not the only priority: automation, predictive analytics, and chat-based tools are gaining traction too.

AI Use in Current Marketing Strategy



Implication for In-House Marketers

The rise of smarter tools offers huge efficiency gains, but only if used strategically. In-house teams need to understand what's worth adopting and how to implement it effectively.

Trends & Expertise

Insight

The challenge isn't adoption; it's application.

As new tools flood the market, the advantage won't just go to the first movers, but to those who use them well.

AI is the hot topic with machine learning being the most interesting trend to be explored, followed by generative AI, yet only 48% of in-house marketing strategies currently include the use of AI.

At **UpShift**, we're helping clients get ahead of generative search in particular. A recent stat suggests only 14% of Google users currently turn to ChatGPT for answers (Search Engine Land), yet usage of AI-powered, generative search is growing as behaviours shift away from traditional search.

We're preparing clients for that shift and ensuring their brands are discoverable and compelling - wherever the journey begins.

How do we do this?

Transition to an "answer-ready" state. Maximise coverage by aligning with how LLMs consume and reason. Remove obstacles to accurate information, prepare to measure impact, and support practical LLM use.

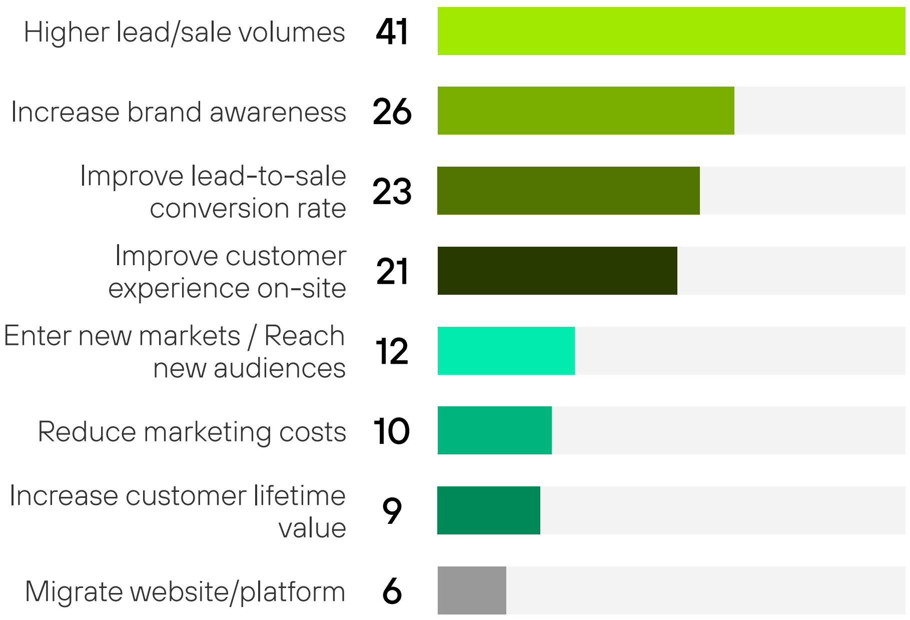
- **IMPLEMENT/UPGRADE SCHEMA.**
  A well-implemented schema is one of the best ways to ensure high coverage and high quality in LLM answers, AIOs, and organic results.
- **REDUCE LLM HALLUCINATIONS.**
  Earn citations with accurately formatted and markup data.
- **CONTENT COVERAGE.**
  Ensure each priority topic is comprehensively covered and accessible to AI across your site. If you're not talking about it, you won't be part of the conversation. Brands should engage customers at every stage of the buying process. Deep research into behaviours and intent across the funnel should inform your content.
- **OPTIMISE FEED QUALITY.**
  Across Merchant Centre, Vehicle Ads and Inventory to ensure real stock and prices pull into AI answers.
- **MEASURE WHAT MATTERS.**
  Build dashboards for AIO citations, AI-surface impressions, AI referral traffic quality, and down-funnel outcomes.
- **HELPING TO DISCERN WHEN TO USE AI.**
  Assist and not to replace to ensure high quality as well as efficiency.

Future Objectives

Ambition Without Alignment

Future Objectives

Marketing Objectives For This Year



What This Tells Us

Marketers are focused on growth, but they're not fully confident in the strategies underpinning that growth. While most already use agencies, success is inconsistent, especially when partnerships lack strategic focus or sector experience.

Implication for In-House Marketers

Big goals need bold actions. Without a clear roadmap, robust KPIs, and a measured appetite for risk, even strong objectives can fall flat. Whether in-house or via external partners, strategy and execution should embrace experimentation. Marketers must test and learn, make time to think beyond the status quo, and iterate based on evidence to achieve brand ambitions.

Future Objectives

Insight

Ambition isn't the problem, alignment is. Marketers know what they want: more leads, stronger brands, better conversions. But they're expected to deliver within constrained budgets and a narrow set of channels and tactics.

As noted earlier, pushing bottom-funnel activity only gets you so far.

Doing what you've always done stalls progress. and eventually leaves you behind.

New entrants to the market have an edge: no legacy systems, no sacred processes. They face today's market with a 'day-one' mentality, pro-risk and quick to act on priorities.

To move the needle, break the pattern and experiment: new technologies, creative campaigns, fresh channels, and reallocated budgets.

TAKE MEASURED RISKS, AND GIVE YOUR AGENCIES LICENCE TO DO THE SAME.

A proven agency helps de-risk experimentation: more minds, deeper specialism, and pattern recognition across accounts. Sometimes the brief will push into new territory for them too; if you create space to try, learn, and iterate, you'll stay ahead by adapting faster than competitors

Recommendations

The survey results reveal a sector that is ambitious - but constrained, clear on its goals - but hindered by resources, measurement, and confidence.

To bridge this gap, automotive marketers should focus on three strategic moves.

1.

Rebuild Measurement and ROI Frameworks

If ROI, attribution, and actionable insight are the number one pain points, they must also be the starting point for progress.

- Establish a consistent measurement framework that ties spend directly to business outcomes, not just clicks or impressions.
- Invest in attribution modelling and campaign dashboards that show the full customer journey, from awareness to conversion.
- Use data not only to report past performance but to proactively inform decisions about budget allocation and channel strategy.

2.

Rebalance the Channel Mix

The data shows over-reliance on Paid Search and short-term tactics. To reduce risk and unlock growth, marketers need a more balanced portfolio.

- Diversify spend beyond the bottom of the funnel by investing in awareness-building content, including video, social, and case studies.
- Strengthen organic levers such as SEO and content to reduce dependency on paid traffic and auction dynamics.
- Build in regular channel reviews to ensure spend reflects both performance today and long-term demand creation.

3.

Raise the Bar for Partnerships

With two-thirds of respondents already using agencies, and many voicing frustrations, the role of partners must evolve.

- Prioritise agencies with deep automotive expertise, not just generic digital capability.
- Demand outcome-focused delivery: reporting that links activity to tangible results like leads, conversions, or sales.
- Set expectations around speed, responsiveness, and brand understanding, ensuring partners act as an extension of the in-house team, not a detached supplier.

Conclusion

The picture that emerges from this survey is one of a sector caught in a strategic stalemate, driven by high ambition, but often constrained by resources.

Marketers know where they want to go: **more leads, stronger brands, smarter data use**. But the tools, clarity, and confidence to get there are still catching up.

Throughout this whitepaper, the same themes resurface: confidence in strategy is middling, performance channels dominate, and while AI is being explored widely, it's rarely integrated with precision. Meanwhile, measurement remains the most pressing challenge, and expectations of external partners are increasing.

This isn't a sector that lacks drive; it lacks direction. Marketers are pushing forward, but without strong attribution, balanced investment, or agile partnerships, progress risks stalling.

Key Takeaways from the Survey

- Measurement and attribution remain the #1 barrier to effective marketing
- Paid media and social dominate budgets, while brand-building channels are underused
- AI is being adopted, but often without strategic depth or clear use cases
- 30% report single-channel reliance; diversify to reduce risk
- Marketers want partners who are transparent, specialised, and communicative, not just “experts”

We believe the next phase of growth in automotive marketing won’t be led by bigger budgets or louder messaging; it will be led by clarity. Clarity in strategy. Clarity in measurement. Clarity in what partnerships are truly delivering.

This whitepaper isn’t the final word. It’s a benchmark. A snapshot of where the industry stands in the second half of 2025, and a signal for what comes next.

If you need help increasing revenue, achieving clarity in attribution and ROI, or rebalancing your channel mix, then let’s talk. At UpShift, we turn these challenges into opportunities.

We’re ready to turn a 6/10 strategy into confident growth.

If any of the above resonates with you,

speak to one of the team to see how we can help.

TRUSTED BY:

UpShift

Evolved Digital Marketing Ltd
Toffee Factory
Lower Steenbergs Yard
Newcastle upon Tyne
NE1 2DF

upshift.co.uk
enquiries@upshift.co.uk
0191 375 9170