



EXPERIAN AUTOMOTIVE

Q4 2024

# Automotive Consumer Trends & Analysis

**Kirsten Von Busch**  
Director, Product Marketing  
March 20, 2025

# Q4 Report overview



## Cars – Q4 2024

What cars are on the road and who is buying them?

Vehicles in Operation overview and Consumer Analysis by segment type, for U.S. light duty vehicles through December 31, 2024.

*Note: Throughout the report R12 = the last twelve months. 'Cars' includes convertibles, coupes, hatchbacks and sedans.*

Today's presenter



**Kirsten Von Busch**

Director of Automotive  
Product Marketing

Experian Automotive

# Delivering High-Quality Automotive Intelligence

Experian is the **only** primary data source for all three:



**VEHICLE DATA**

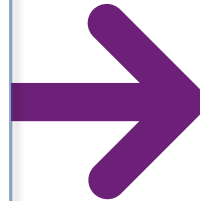


**CONSUMER DATA**



**STATISTICAL  
CREDIT DATA**

These separate data sources generate **BILLIONS of Data Insights** we use to serve our clients.



From these primary sources, we deliver automotive data intelligence to fit **your unique needs and solve today's challenges.**



## **Our clients include:**

- Lenders
- FinTech
- Dealers
- OEMs
- Tier 1 and Tier 2 Media Platforms & Agencies
- Aftermarket
- Insurance Carriers



# Experian's primary data assets



Experian is the **only** primary data source for all three separate database assets.



## North American Vehicle Database<sup>SM</sup>

**975M+**

Vehicles in U.S. (all 50 states, Wash. D.C., Puerto Rico) and Canada.

**312.9M+**

US VIO

**27.9M+**

Canadian VIO

**22.1B+**

Vehicle history records.

**420M+**

Title Brands.

**402M+**

Accident & damage related events.

**298M+**

Recall events.



## Consumer View<sup>SM</sup> Marketing Database

**250M+**

Individuals.

**126M+**

Households.

**5000**

Consumer attributes.

**550M**

Mobile IDs.

**250M+**

Connected TV IDs.

**800M**

Hashed email.

**2,400+**

Audience segments including 750+ Auto Audiences.



## File One<sup>SM</sup> Credit Database

**CONSUMER**

**2M+**

Credit inquiries daily.

**1.3B+**

Transaction updates/month.

**245M+**

Credit active consumers.

**50M+**

Public records.

**99.9%**

Updates within 24 hours.

**Sub-second**

Credit report response rate.

**BUSINESS**

**25M+**

# Q4 2024 Car Customers

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- What are they driving?
- Who are these customers?
- How can you best market to them?



# Changes in U.S. vehicles in operation

Light duty vehicles\* over the last 12 months


Q4 2024 Total\*  
**292.3**  
MILLION  
Vehicles on the road

## Q4 2024 VIO changes

Q4 2023 Total\*  
**288.5**  
MILLION  
Vehicles on the road

  
**15.8**  
MILLION  
NEW Vehicles  
Registered

  
**12.0**  
MILLION  
Vehicles went  
out of operation

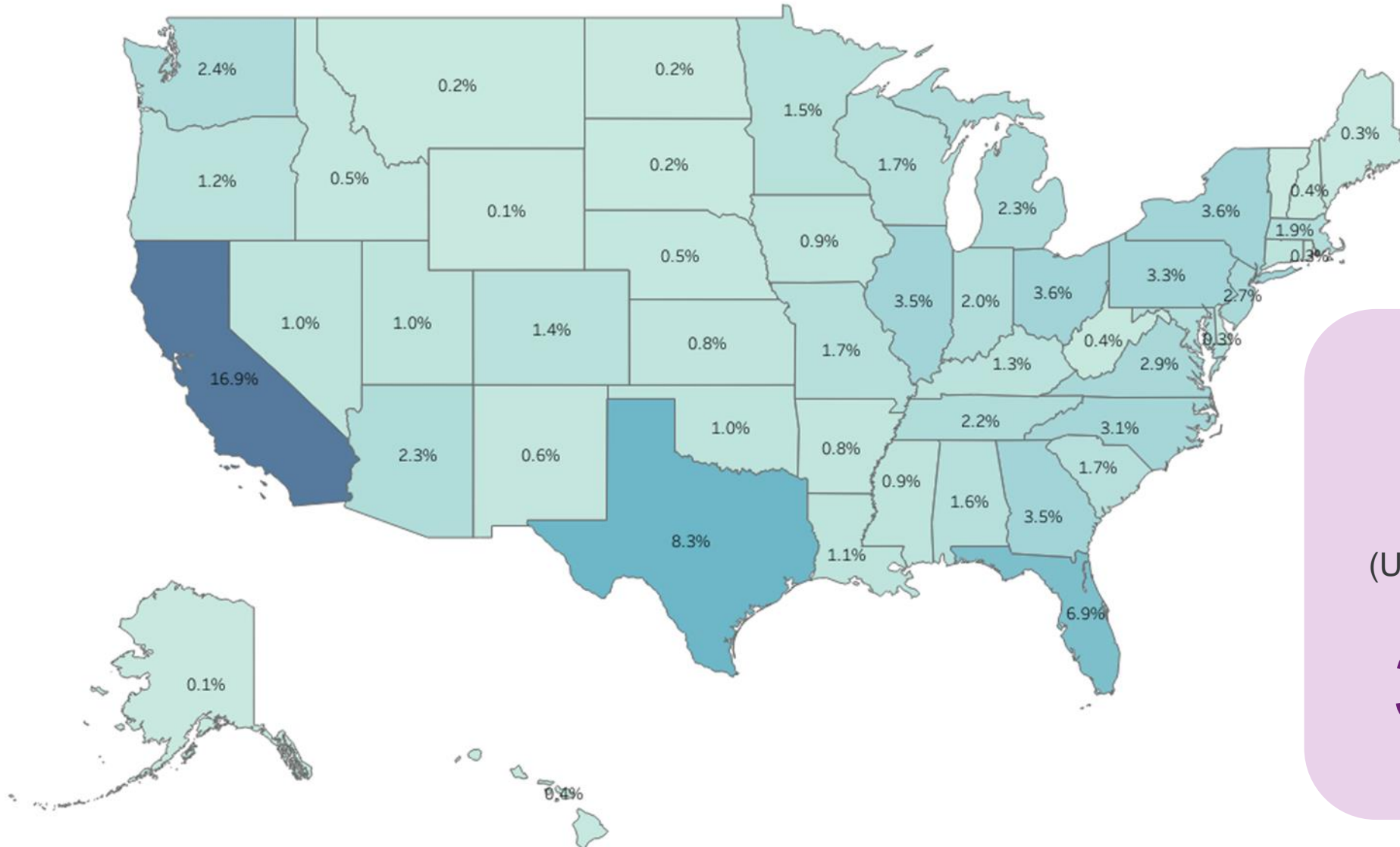
  
**39.2**  
MILLION  
USED vehicles  
changed owners

=

  
**28.7%**  
Total VIO  
changes<sup>1</sup>

\*U.S. Vehicles in Operation data as of Dec 31, 2023 and 2024, sourced from Experian Automotive, including U.S. and Puerto Rico (U.S. light duty vehicles only).  
1 – includes estimated annual households that relocated with the same vehicle(s)

# Q4 2024 U.S. Cars in Operation (VIO)

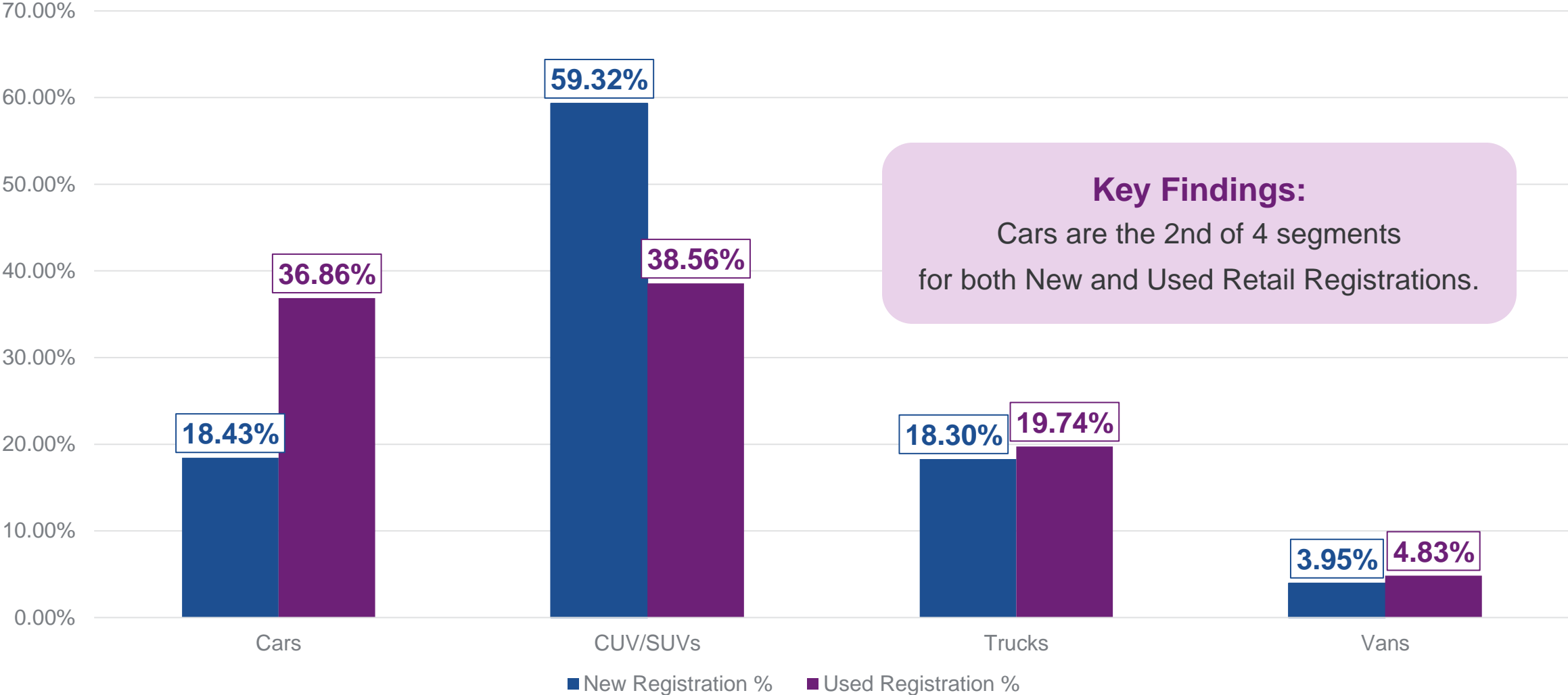


**Key Findings:**

**98M+**  
Cars are on the road in the United States (U.S. Vehicles in Operation)

**33.81%**  
of vehicles on the road in the U.S. are Cars

# R12M Retail Registrations % by Sale Type and Vehicle Segment



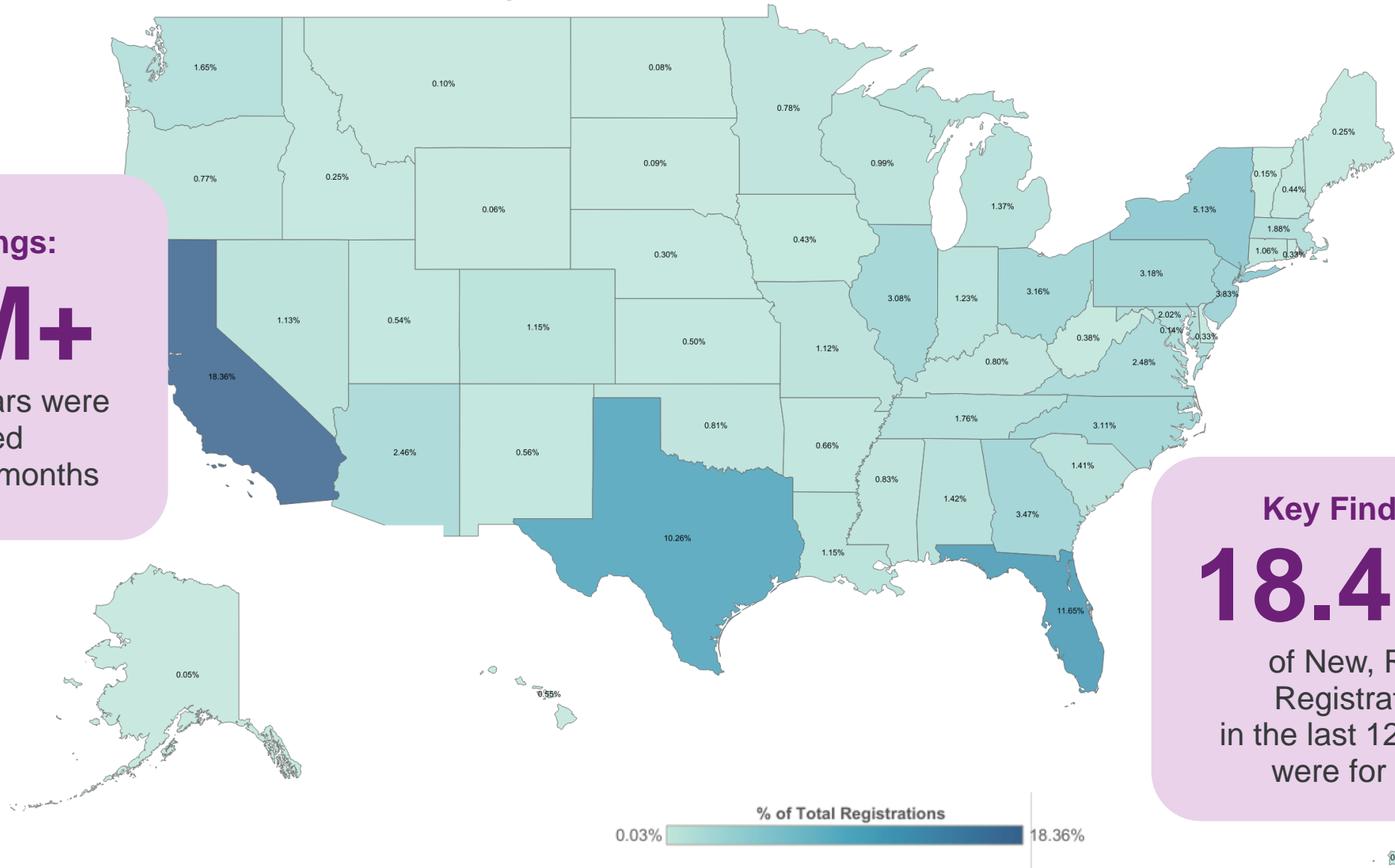


# R12 U.S. New, Retail Car Registrations

## Key Findings:

# 2.3M+

New, Retail Cars were registered in the last 12 months

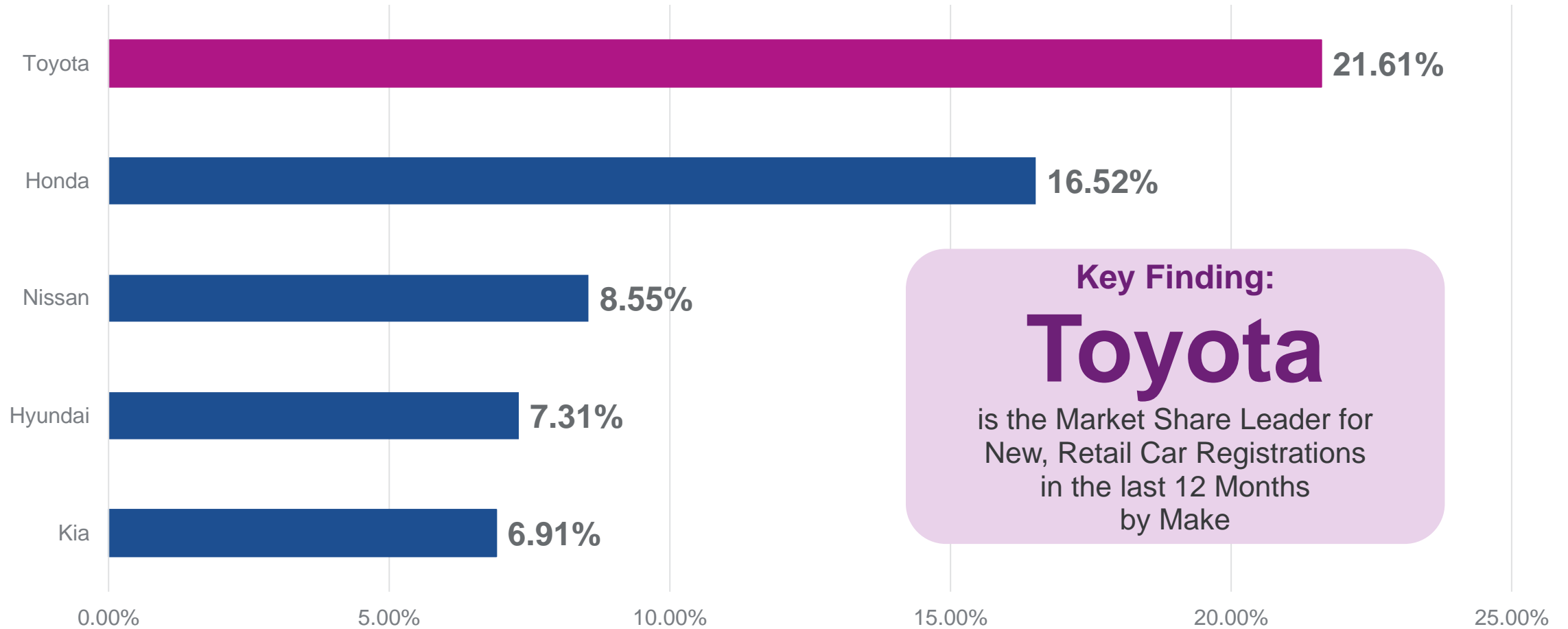


## Key Findings:

# 18.43%

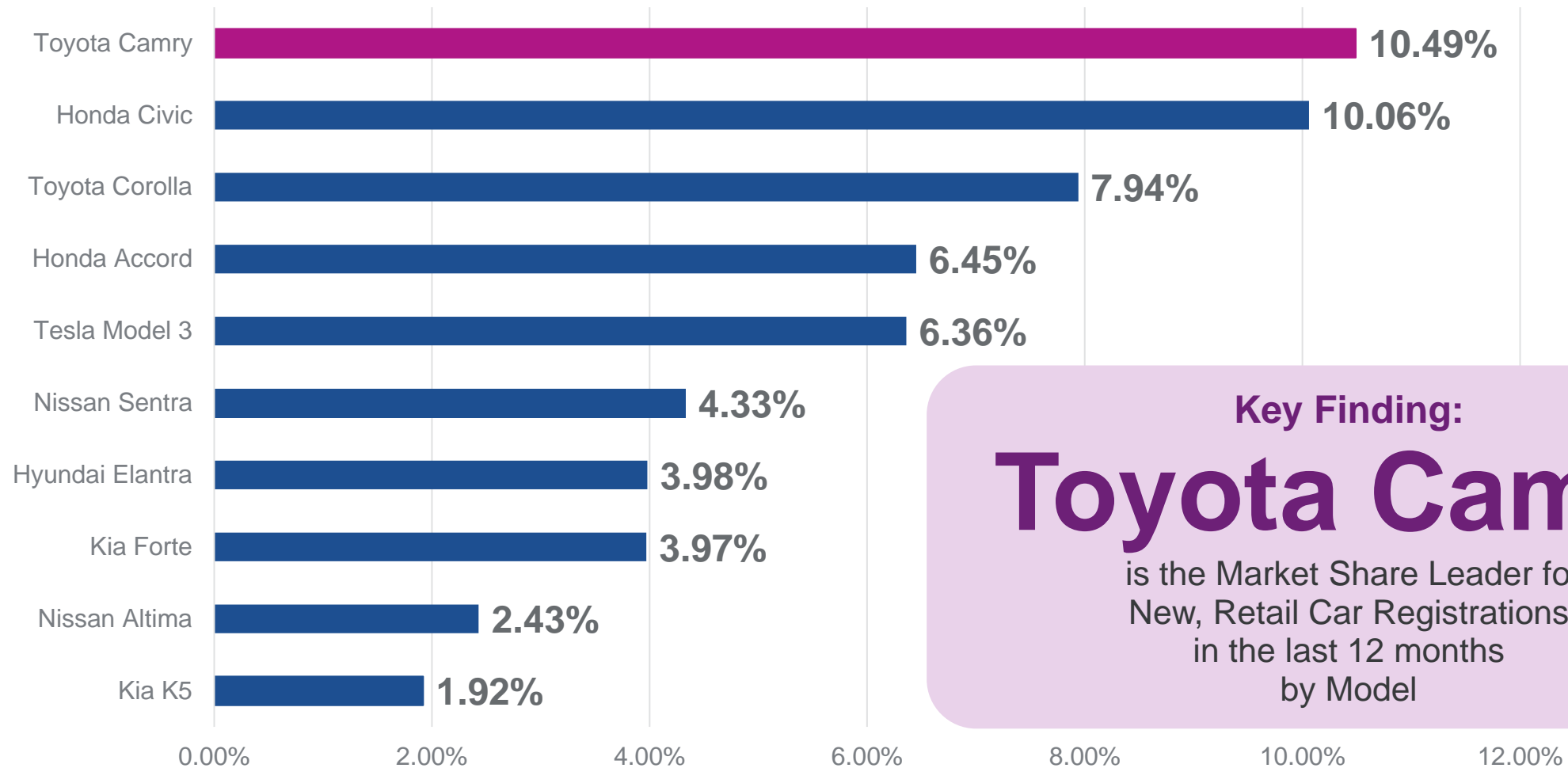
of New, Retail Registrations in the last 12 months were for Cars

# R12 Top 5 New, Retail Car Registration Market Share % by Make



**Key Finding:**  
**Toyota**  
is the Market Share Leader for  
New, Retail Car Registrations  
in the last 12 Months  
by Make

# R12M Top 10 New, Retail Car Registration Market Share % by Model

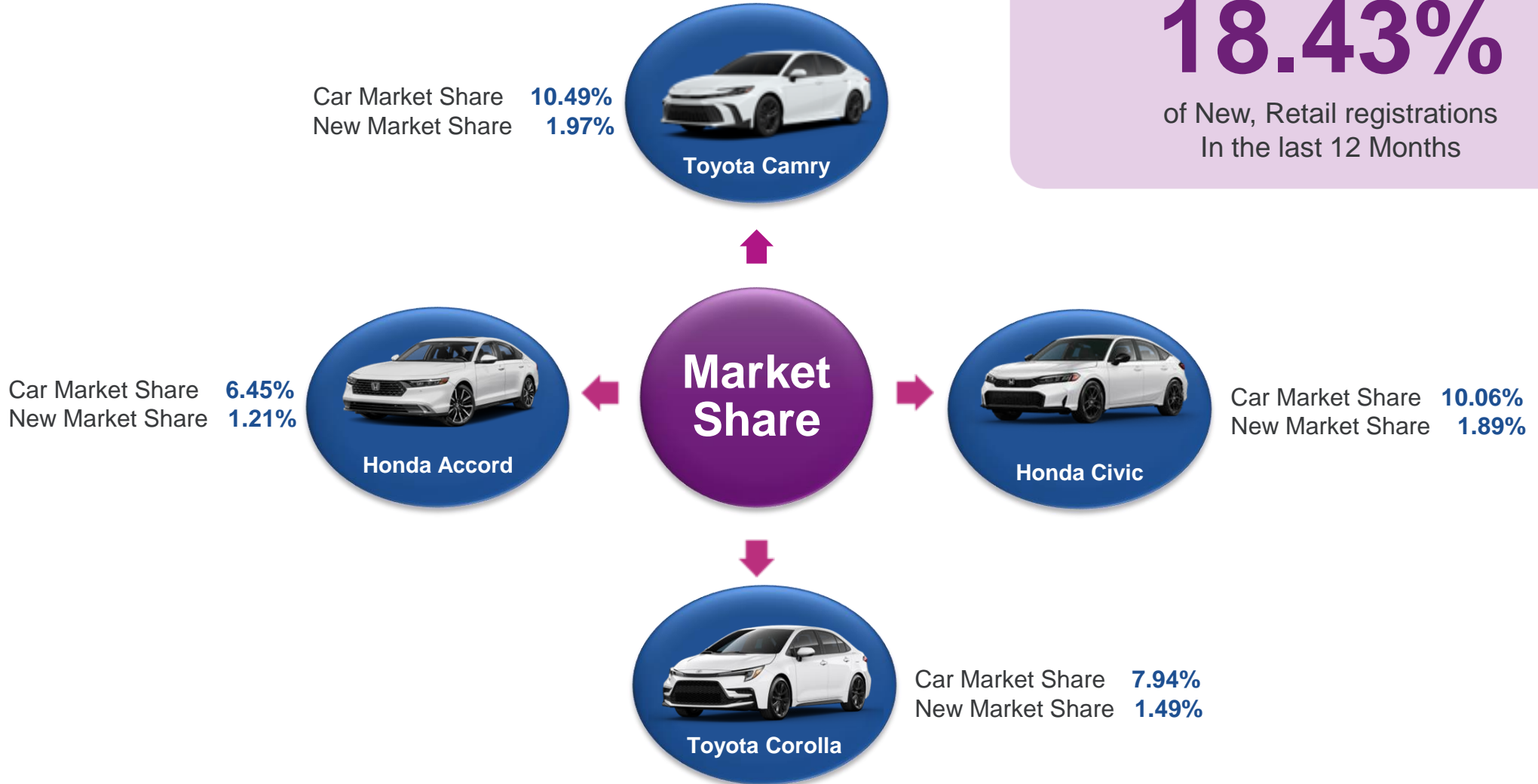


**Key Finding:**  
**Toyota Camry**  
is the Market Share Leader for  
New, Retail Car Registrations  
in the last 12 months  
by Model

# Top 4 Car Model Market Share Overview

New, Retail Registrations for the last 12 months

Cars account for  
**18.43%**  
of New, Retail registrations  
In the last 12 Months



# What Model Did Each Car Replace?

Data includes new-to-new vehicle purchases using Experian disposal methodology for the last 12 months

## Toyota Camry

### Top 4 Inflows Including Toyota Models

Toyota Camry	40.65%
Toyota Corolla	9.03%
Toyota RAV4	3.83%
Honda Accord	3.06%

### Top 4 Inflows From Other Makes

Honda Accord	3.06%
Nissan Altima	1.59%
Honda Civic	1.49%
Hyundai Sonata	1.03%

## Honda Civic

### Top 4 Inflows Including Honda Models

Honda Civic	44.17%
Honda Accord	8.48%
Honda CR-V	3.57%
Honda HR-V	3.41%

### Top 4 Inflows From Other Makes

Toyota Corolla	1.97%
Toyota Camry	1.49%
Hyundai Elantra	1.13%
Nissan Sentra	1.01%

## Toyota Corolla

### Top 4 Inflows Including Toyota Models

Toyota Corolla	42.71%
Toyota Camry	7.63%
Toyota RAV4	4.33%
Toyota Tacoma	3.03%

### Top 4 Inflows From Other Makes

Honda Civic	2.32%
Hyundai Elantra	1.36%
Nissan Sentra	1.11%
Honda Accord	0.89%

## Honda Accord

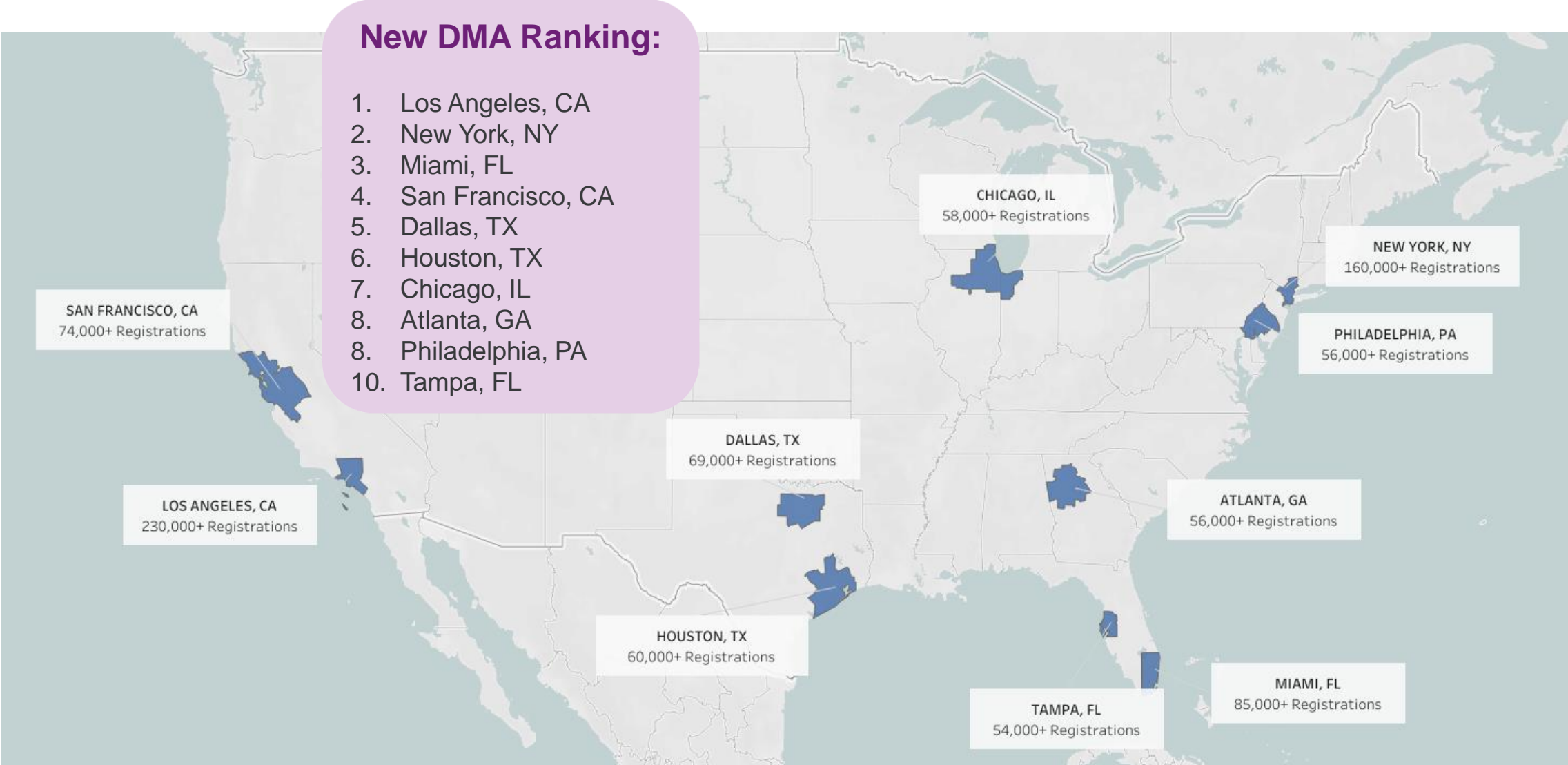
### Top 4 Inflows Including Honda Models

Honda Accord	45.08%
Honda Civic	11.91%
Honda CR-V	4.54%
Toyota Camry	2.89%

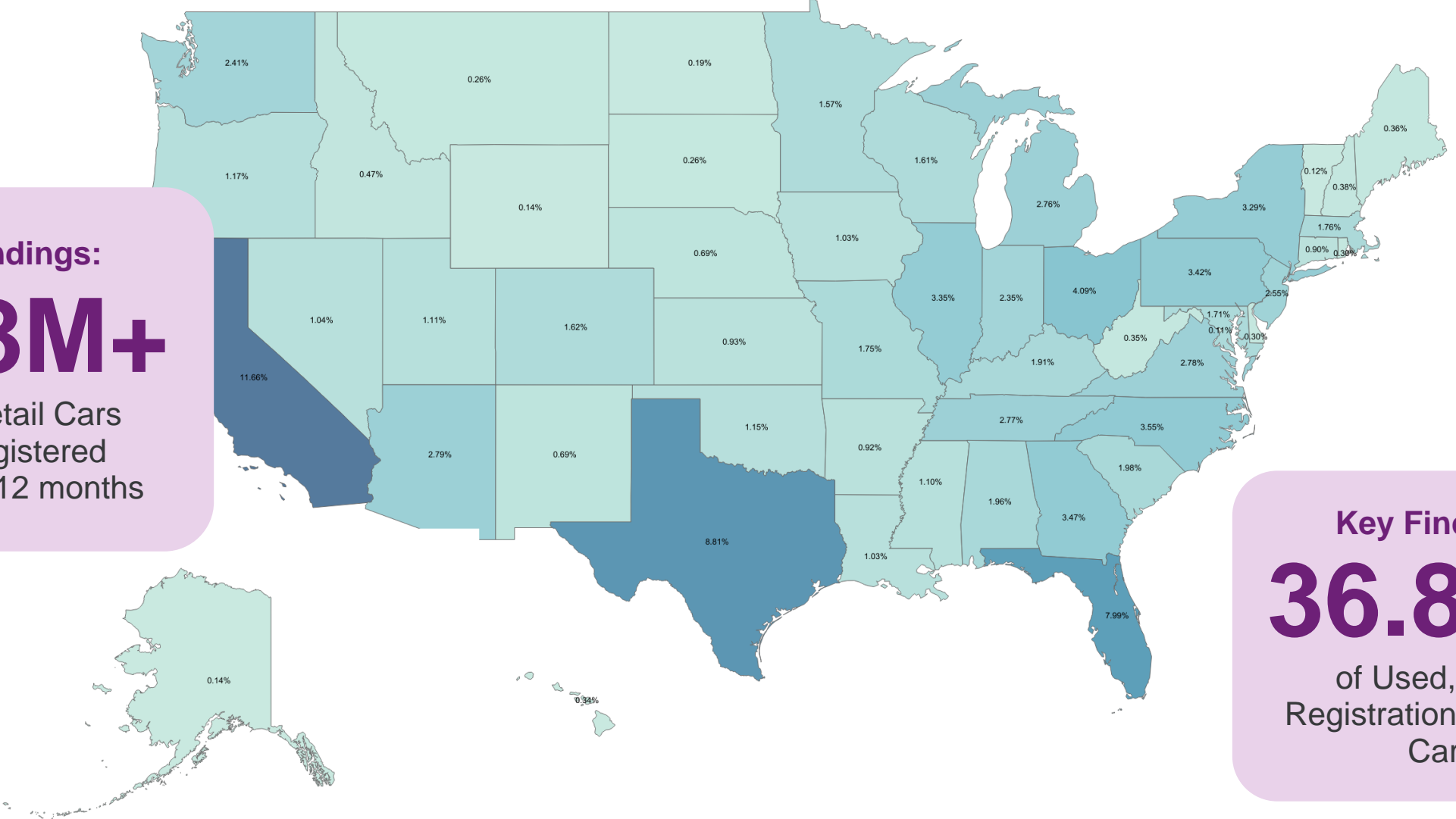
### Top 4 Inflows From Other Makes

Toyota Camry	2.89%
Nissan Altima	1.38%
Hyundai Sonata	1.08%
Toyota Corolla	0.84%

# R12M Top U.S. DMAs for New, Retail Car Registrations



# R12 U.S. Used, Retail Car Registrations

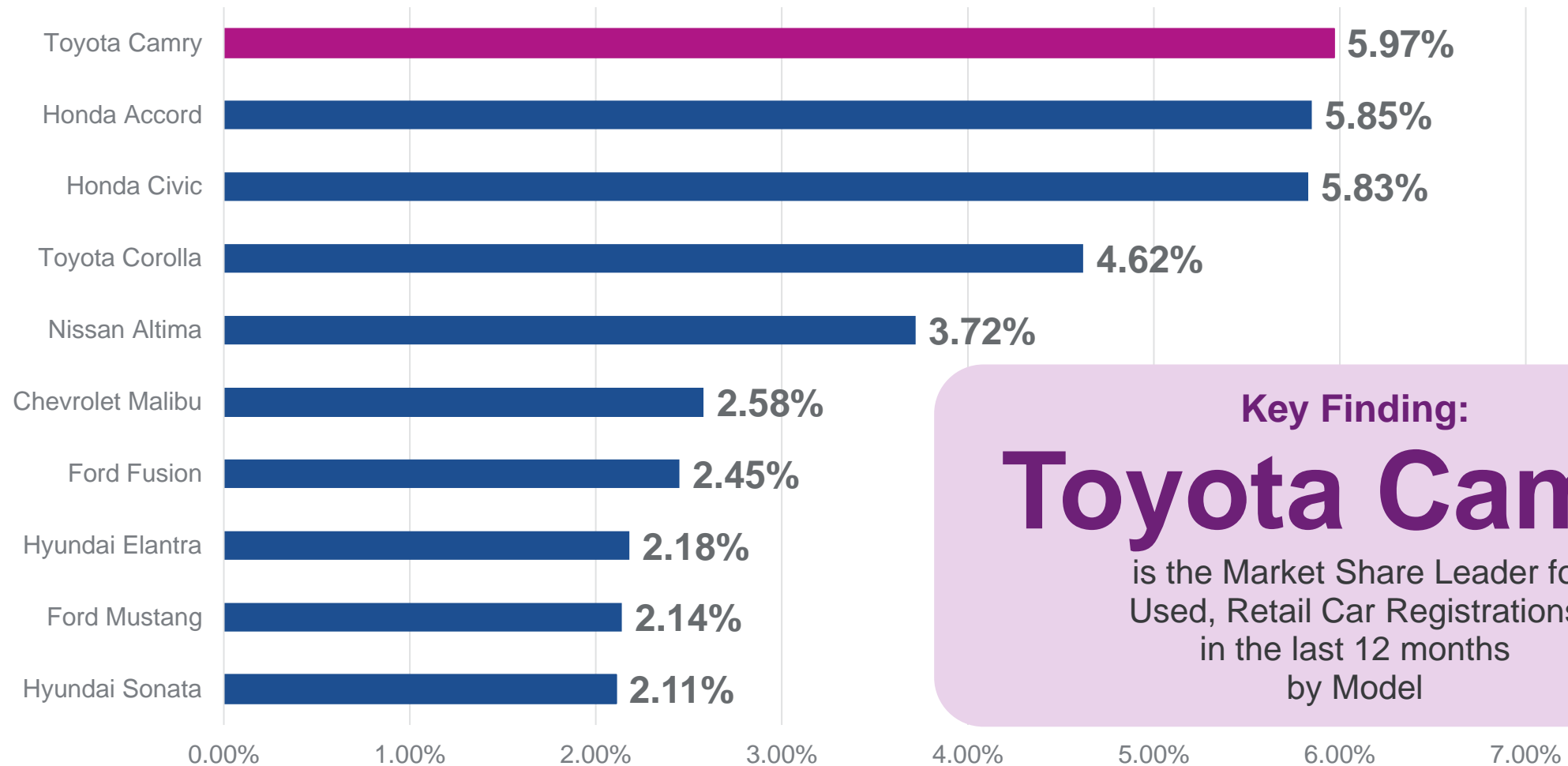


**Key Findings:**  
**13.8M+**  
 Used, Retail Cars  
 were registered  
 in the last 12 months

**Key Findings:**  
**36.86%**  
 of Used, Retail  
 Registrations were for  
 Cars



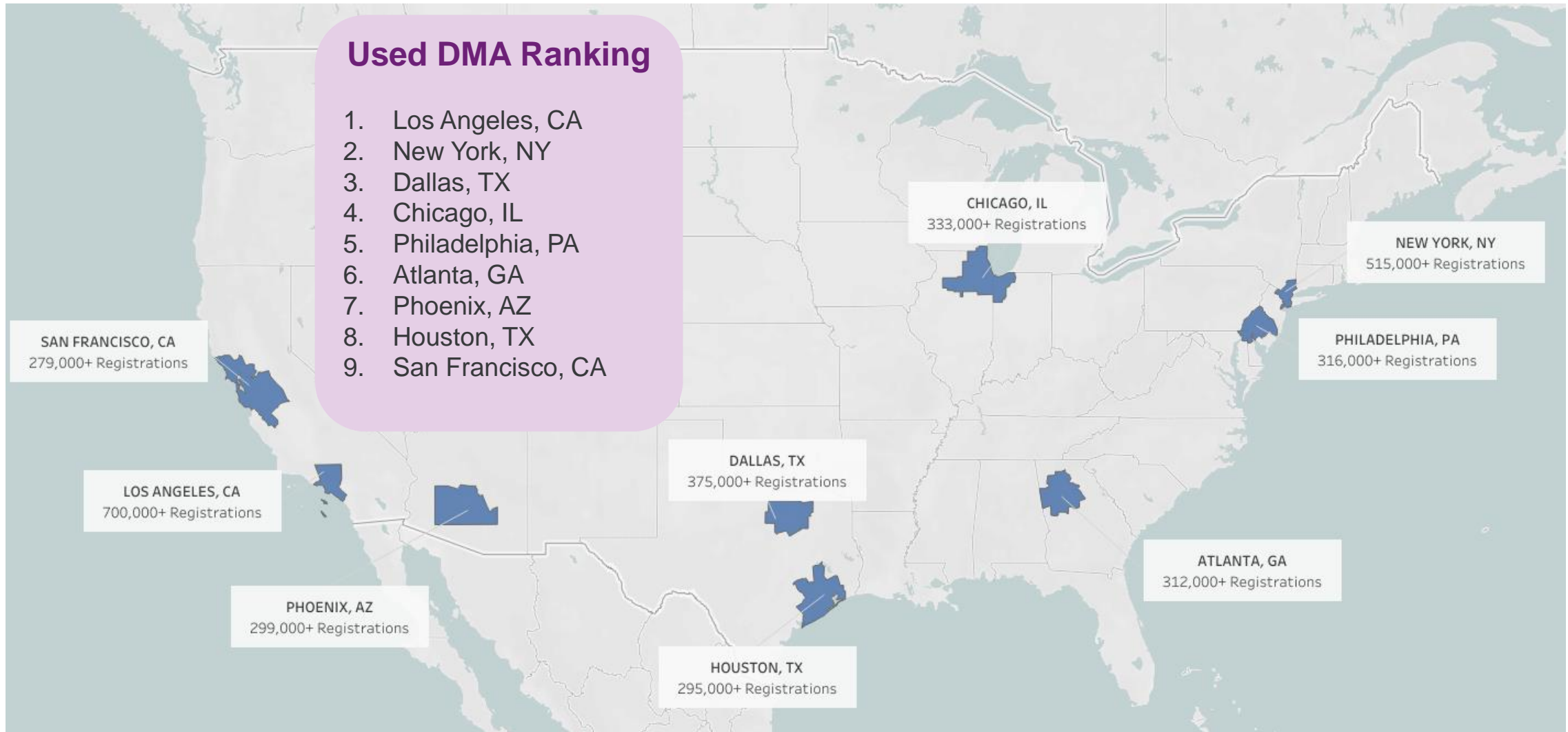
# R12M Top 10 Used, Retail Car Registration Market Share % by Model



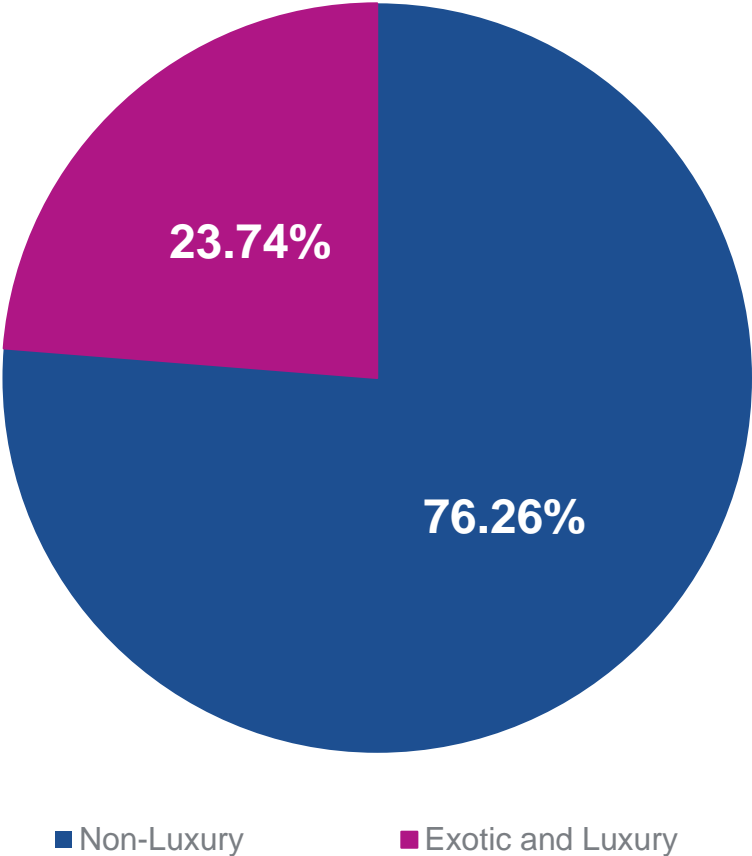
**Key Finding:**  
**Toyota Camry**  
is the Market Share Leader for  
Used, Retail Car Registrations  
in the last 12 months  
by Model



# R12M Top U.S. DMAs for Used, Retail Car Registrations



# R12 New, Retail Car Registration Market Share % by Vehicle Class

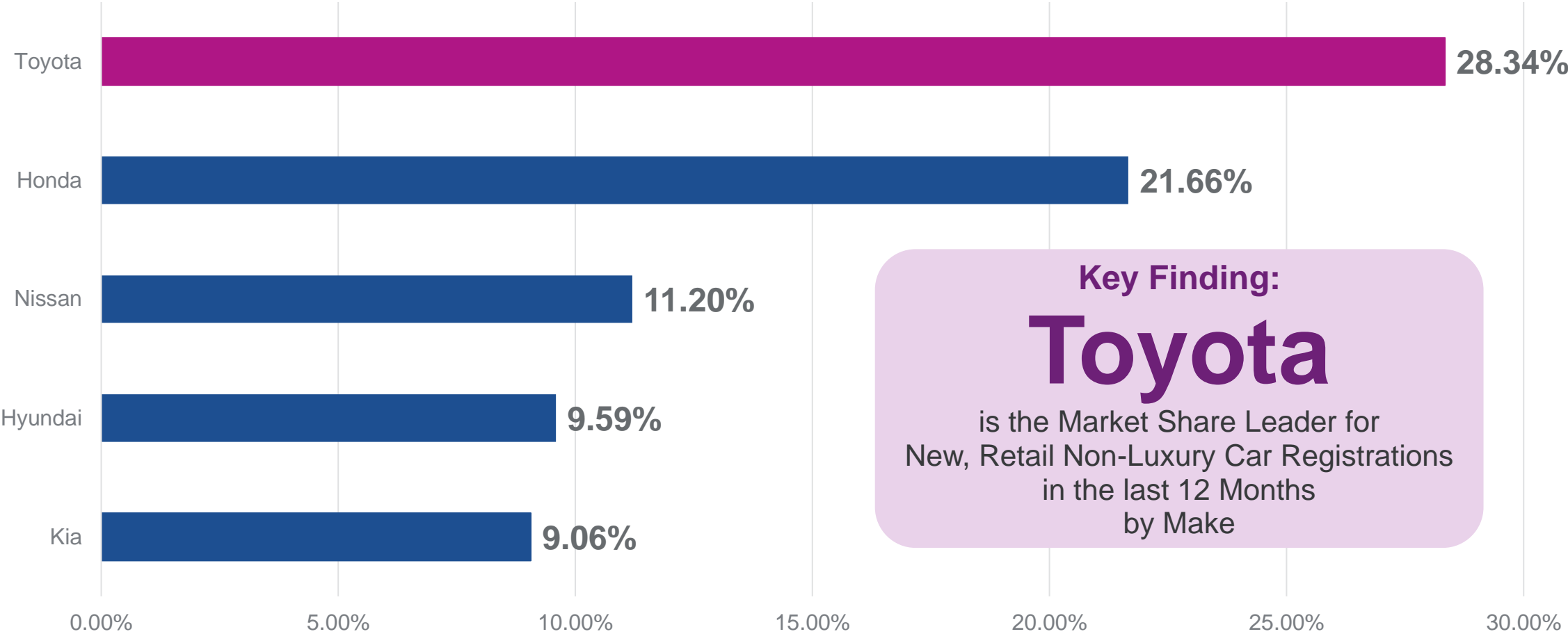


**Key Findings:**  
Non-Luxury Cars account for  
**76.26%**  
of New, Retail Car Registrations in  
the last 12 Months

Luxury Cars account for  
**23.20%**

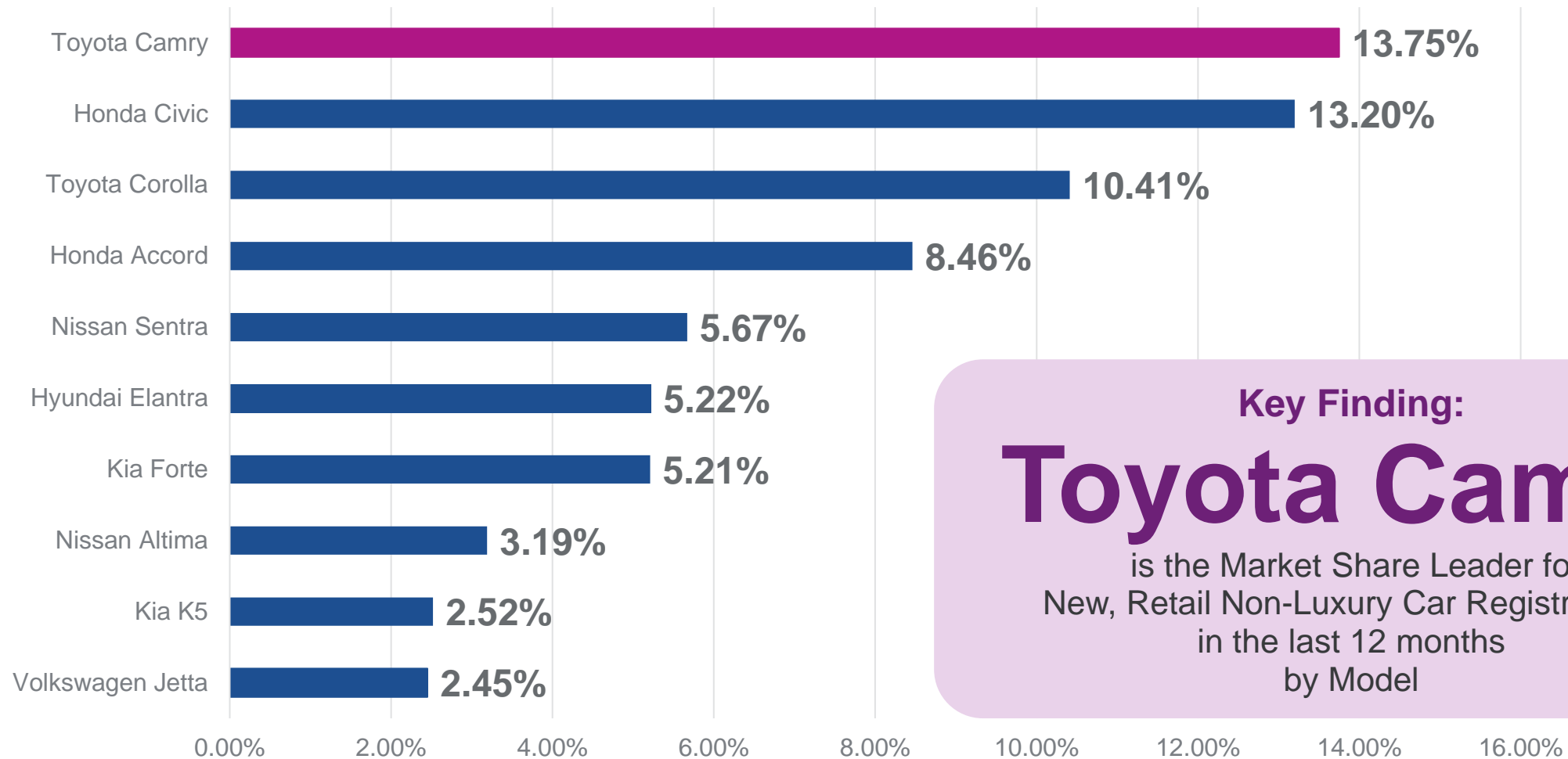
Exotic Cars account for  
**0.54%**

# R12 Top 5 New, Retail Car Registration Market Share % by Non-Luxury Vehicle Class and Make



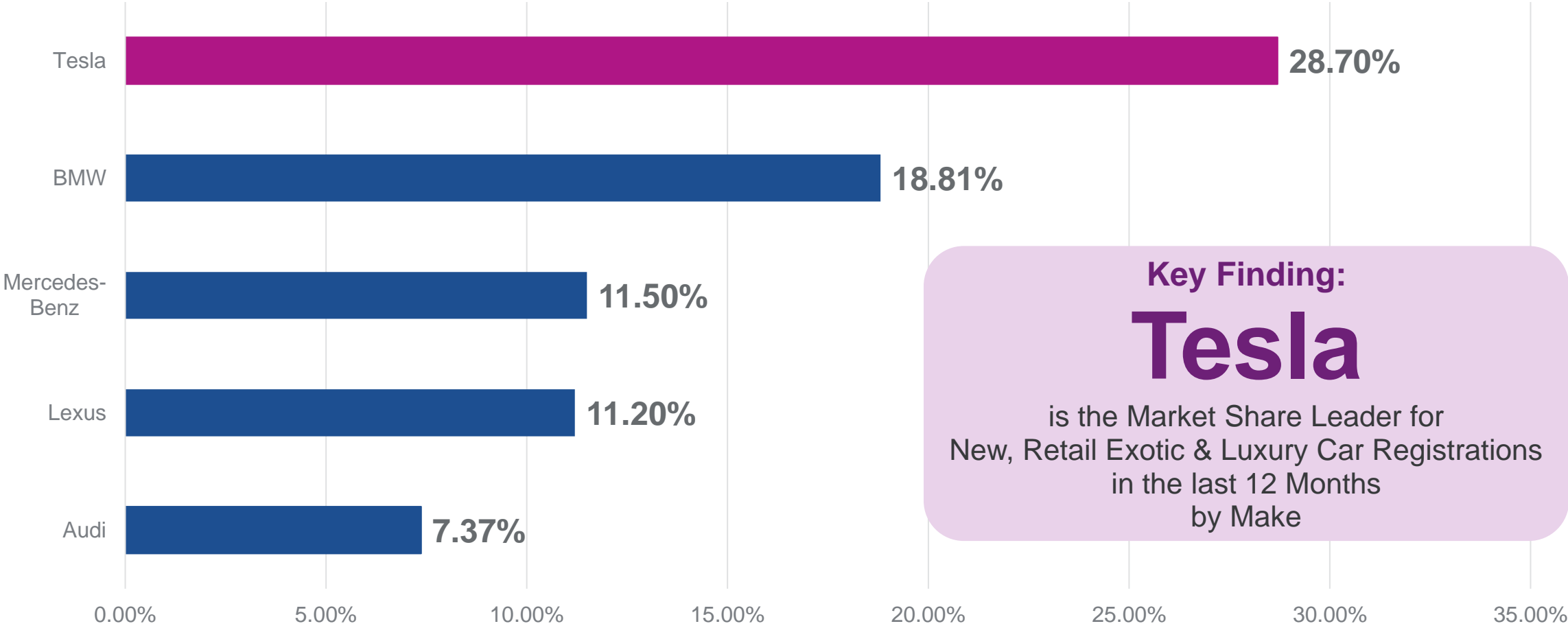
**Key Finding:**  
**Toyota**  
is the Market Share Leader for  
New, Retail Non-Luxury Car Registrations  
in the last 12 Months  
by Make

# R12M Top 10 New, Retail Car Registration Market Share % by Non-Luxury Vehicle Class and Model

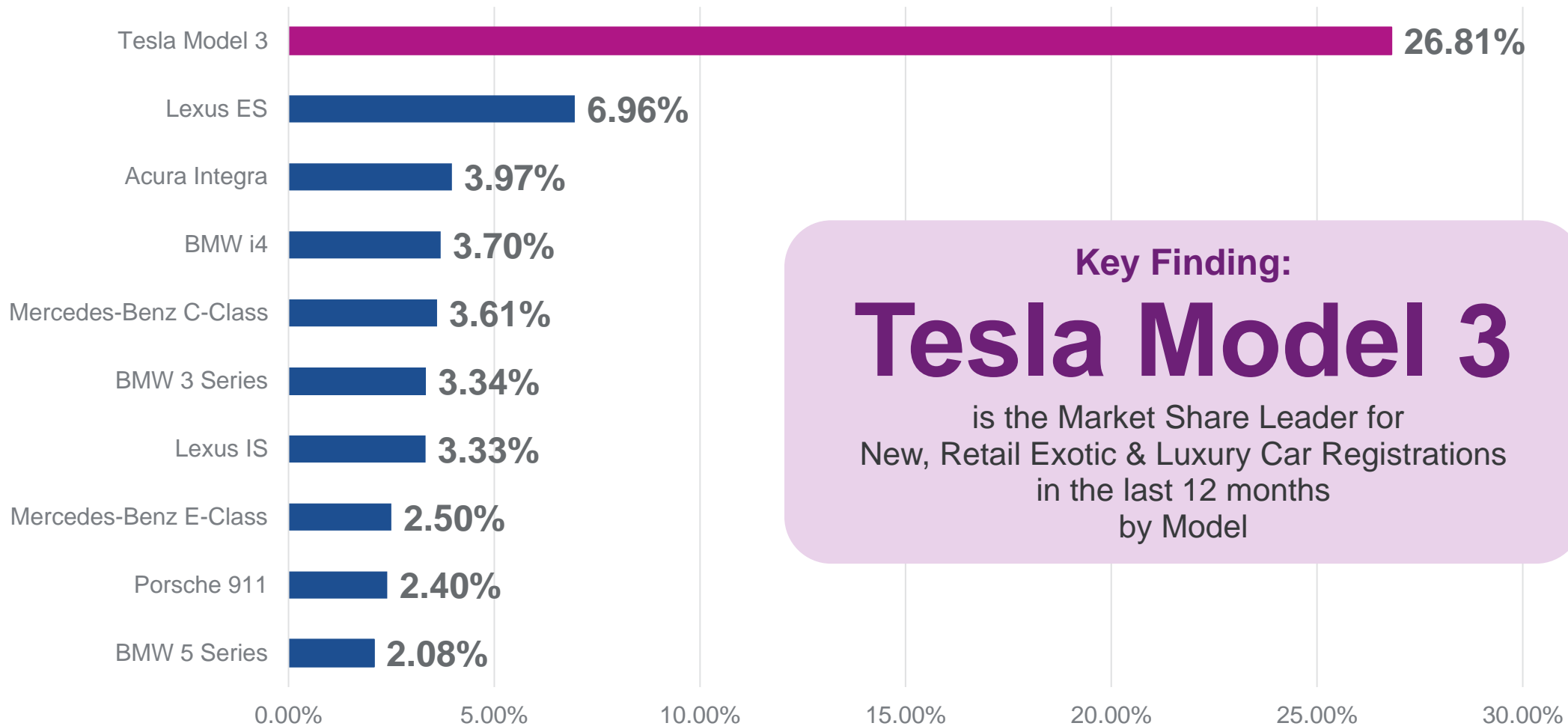


**Key Finding:**  
**Toyota Camry**  
is the Market Share Leader for  
New, Retail Non-Luxury Car Registrations  
in the last 12 months  
by Model

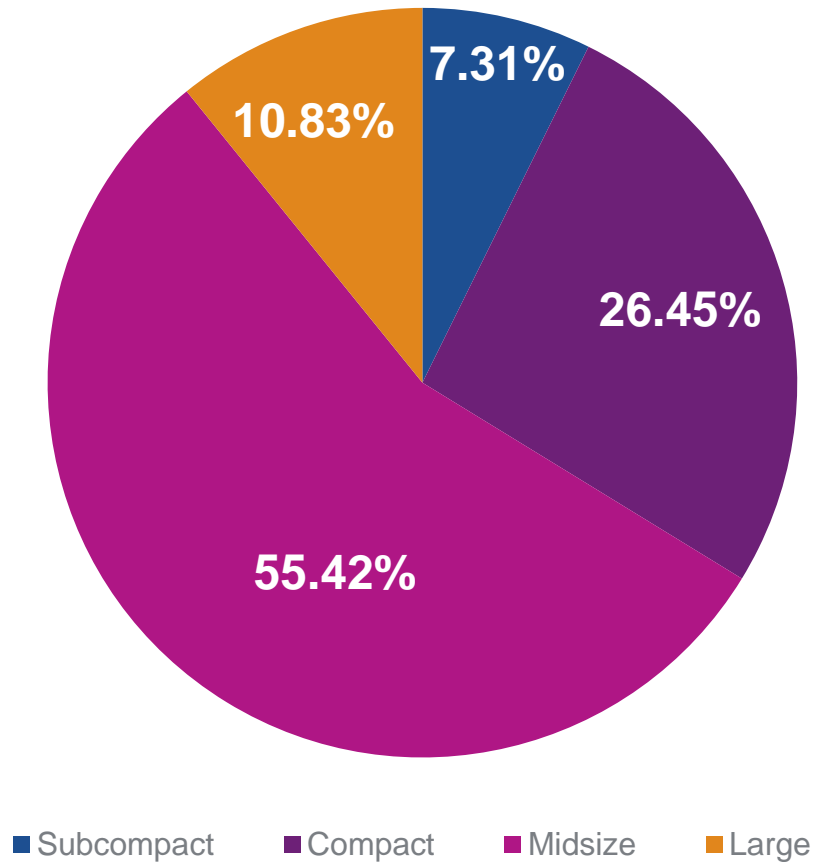
# R12 Top 5 New, Retail Car Registration Market Share % by Exotic & Luxury Vehicle Class and Make



# R12M Top 10 New, Retail Car Registration Market Share % by Exotic & Luxury Vehicle Class and Model



# R12 New, Retail Car Registration Market Share % by Vehicle Sub-Segment



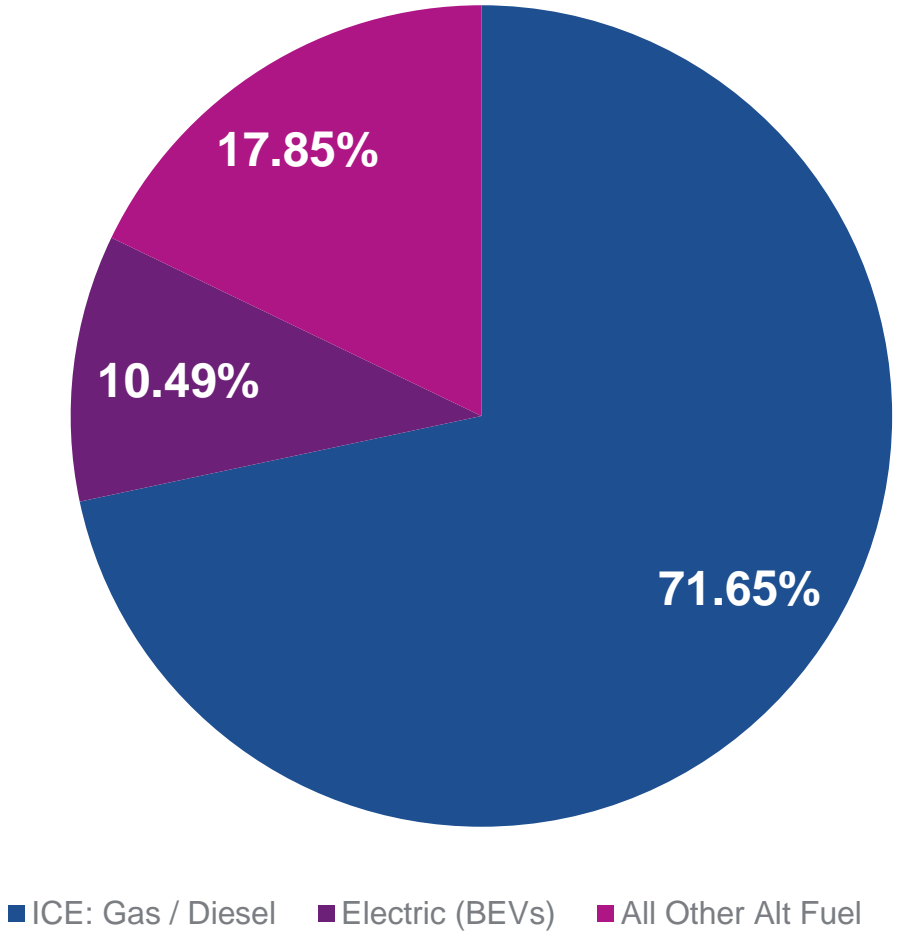
**Key Findings:**  
Midsize Cars account for  
**55.42%**  
of New, Retail Car Registrations in the  
last 12 Months

Compact Cars account for  
**26.45%**

Large Cars account for  
**10.83%**

Subcompact Cars account for  
**7.31%**

# R12 New, Retail Car Registration Market Share % by Fuel Type



**Key Findings:**

ICE: Gas/Diesel Cars account for **71.65%** of New, Retail Car Registrations in the last 12 Months

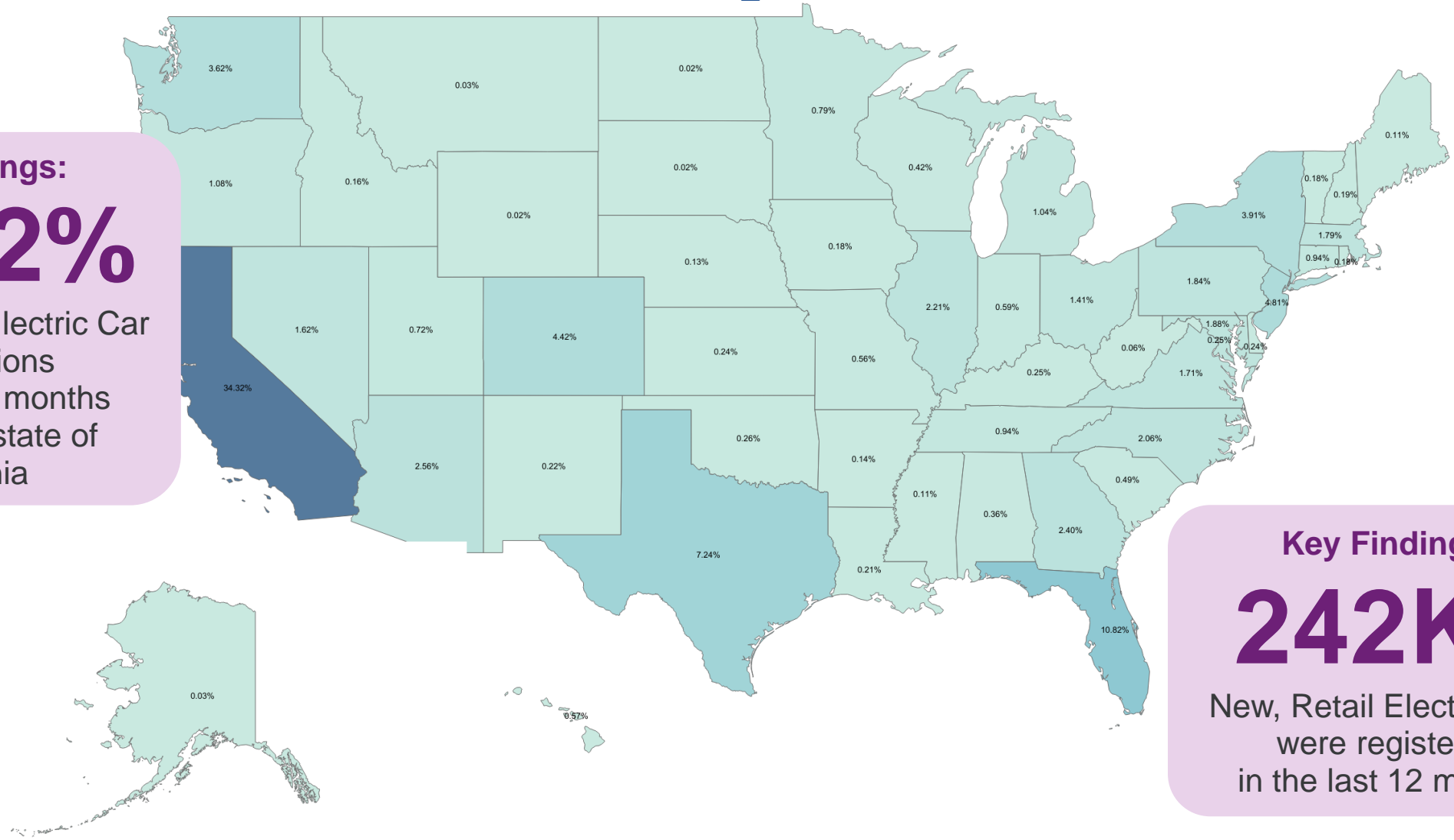
Electric Cars (BEVs) account for **10.49%**

Other Alternative Fuel Cars account for **17.85%**



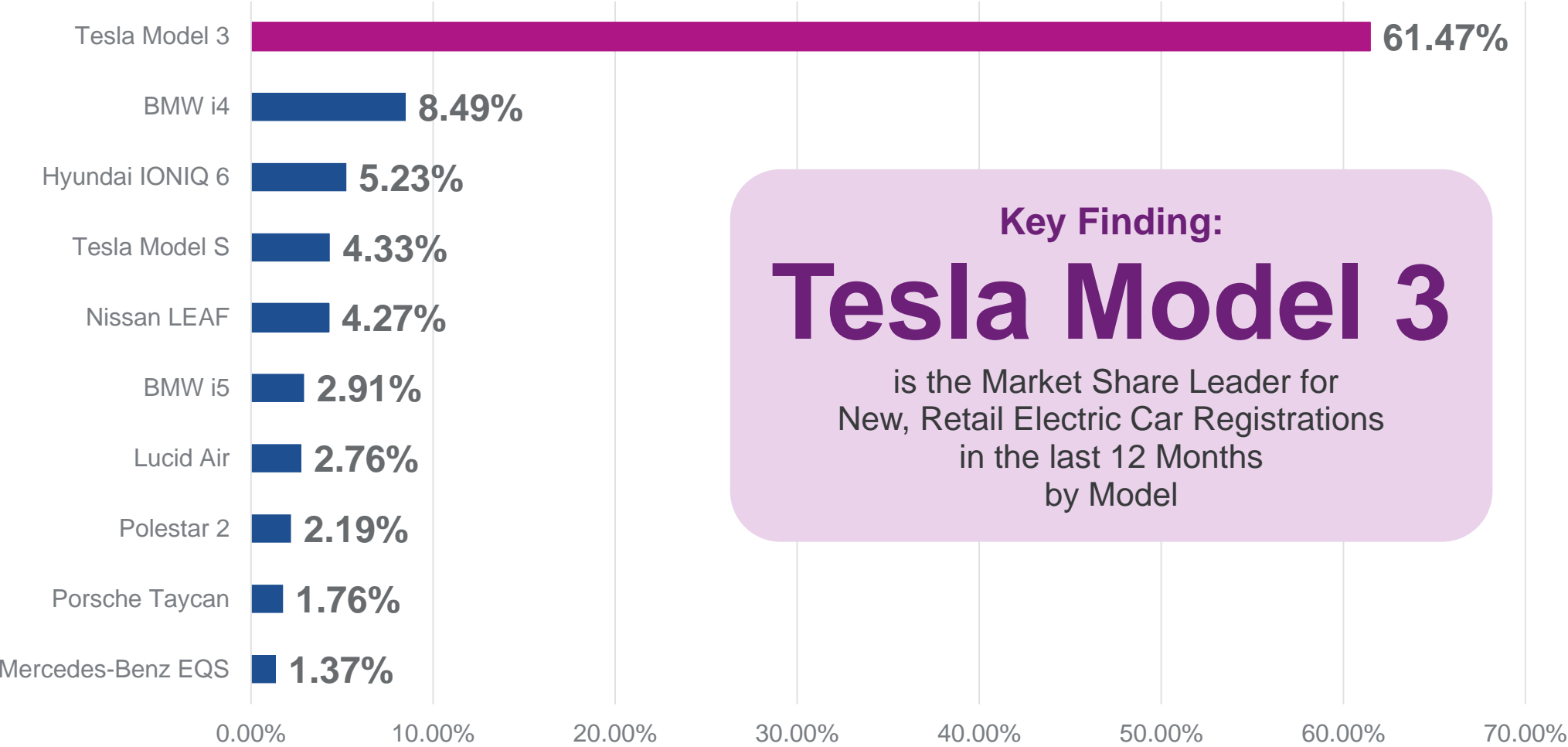
# R12 U.S. New, Retail Electric Car Registrations

**Key Findings:**  
**34.32%**  
of New, Retail Electric Car Registrations in the last 12 months were in the state of California



**Key Findings:**  
**242K+**  
New, Retail Electric Cars were registered in the last 12 months

# R12M Top 10 New, Retail Car Registration Market Share % by Electric Vehicle (BEV) Fuel Type and Model



# Q4 Summary Insights

## What Cars Are They Buying?



Cars represent 18+%  
of New, Retail  
Registrations in the  
last 12 months.



Of the New, Retail  
Car Registrations,  
76.26% are for Non-  
Luxury vehicles and  
23.74% are for Exotic  
and Luxury.



Toyota is the  
Car Market Share  
leader, with 21.61% of  
the new, retail car  
market share.



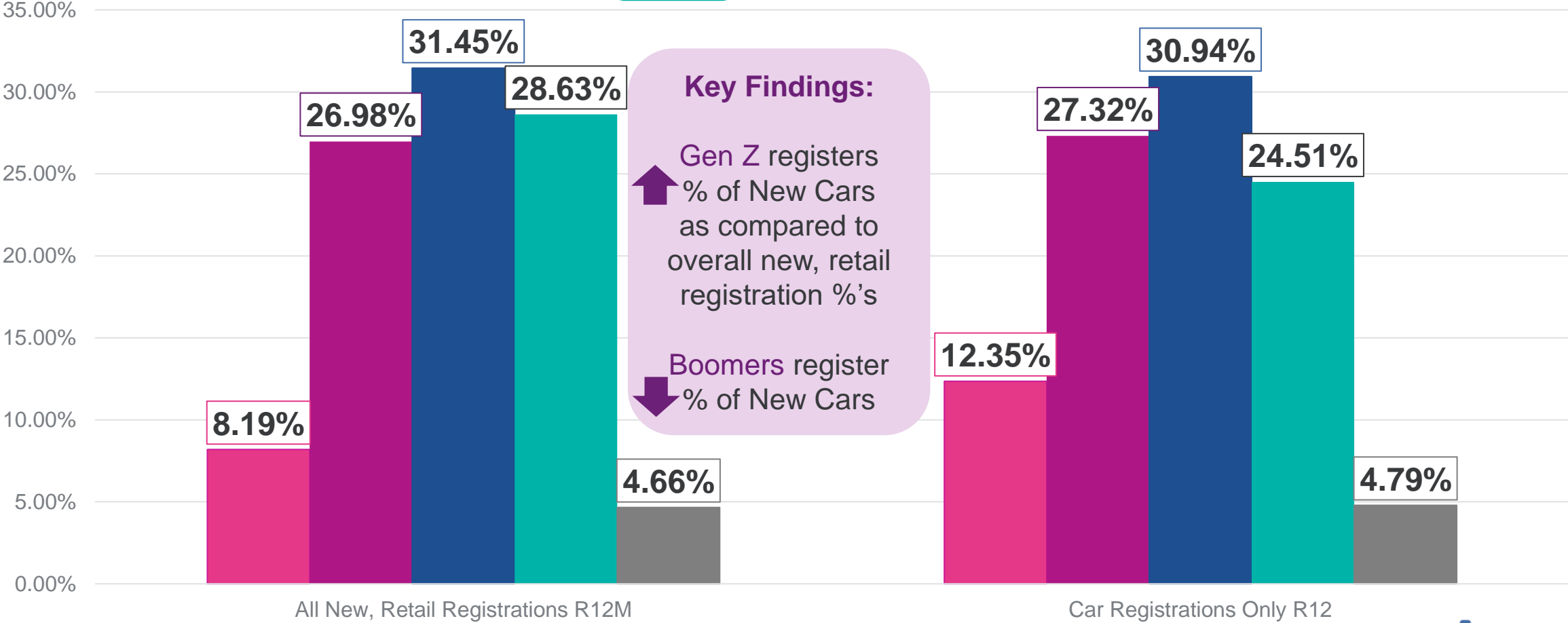
# Q4 2024

## Who are these customers?

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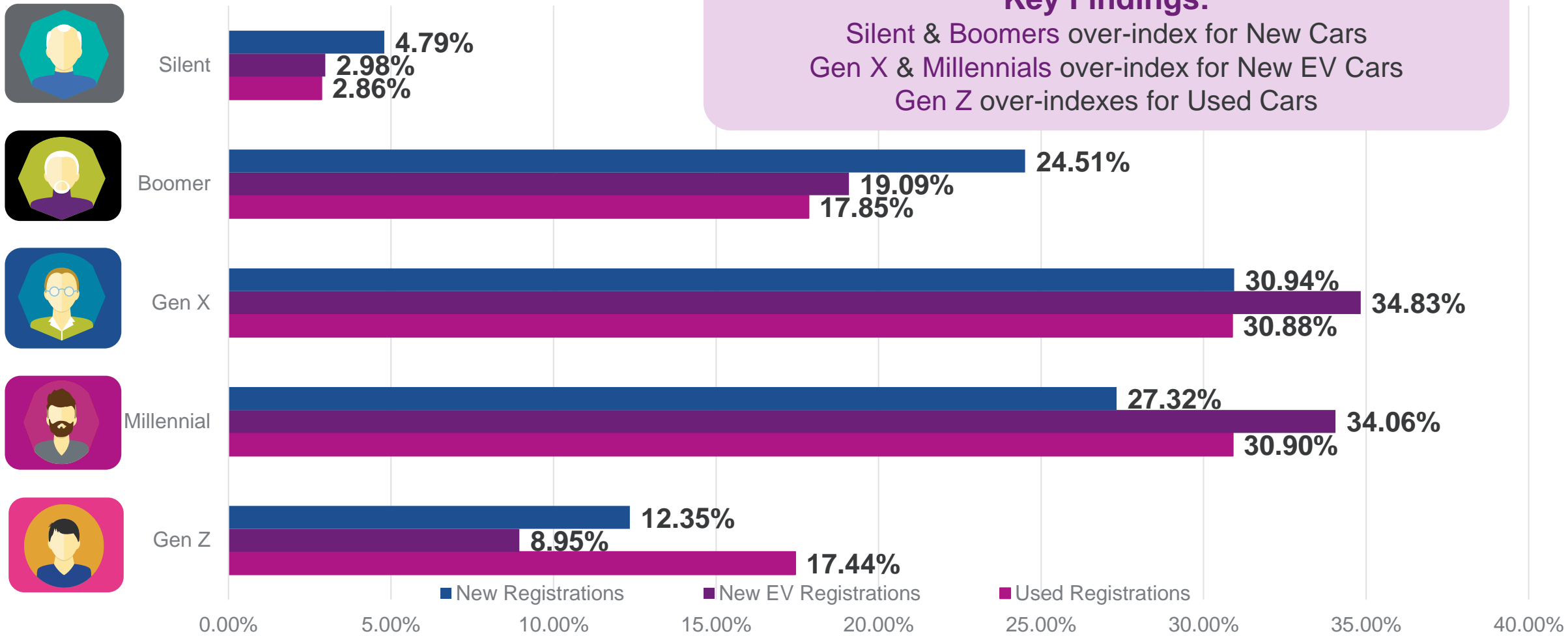
- Demographic information
- Generational insights
- Lifestyle segmentation

# R12M New, Retail Car Registration % by Generation

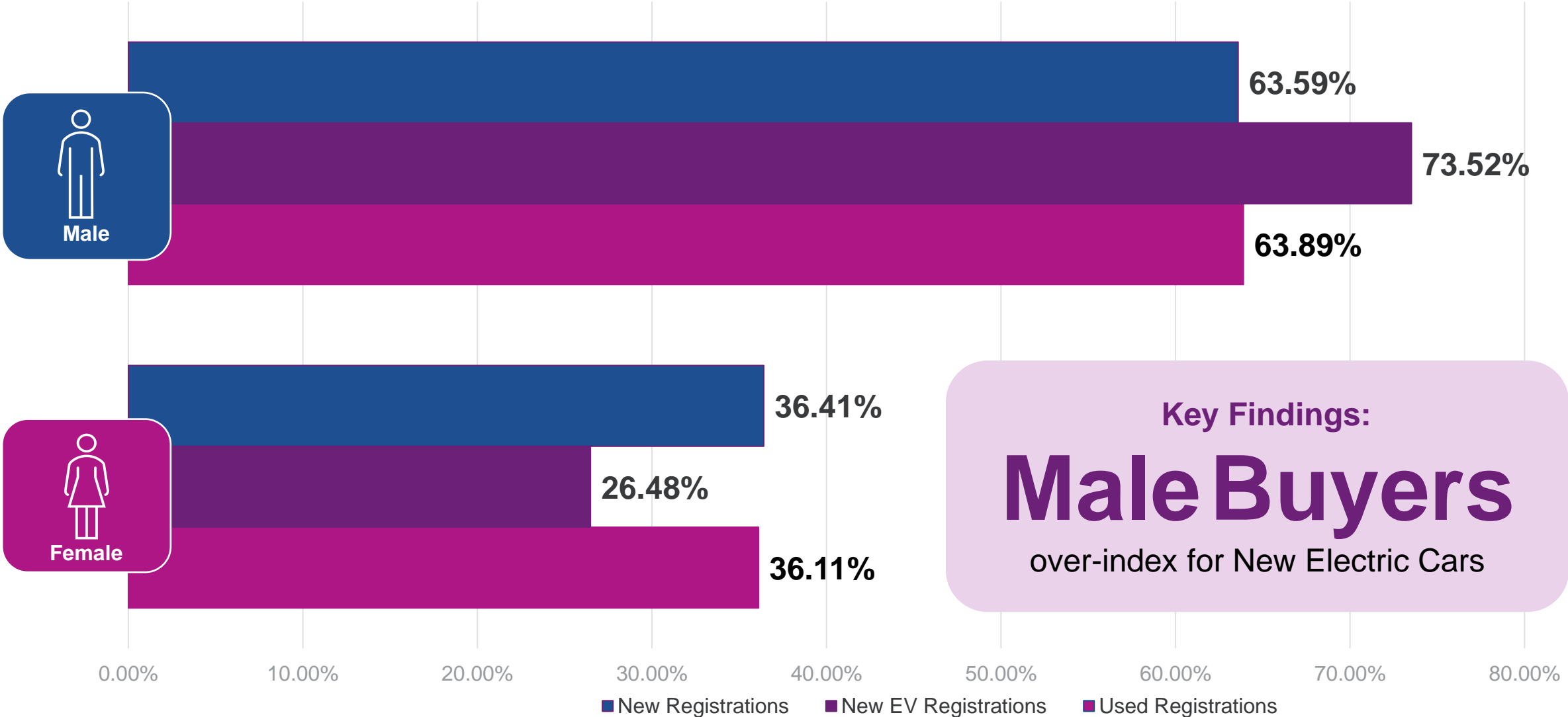


# R12M Retail Car Registration Market Share % by Generation & Class

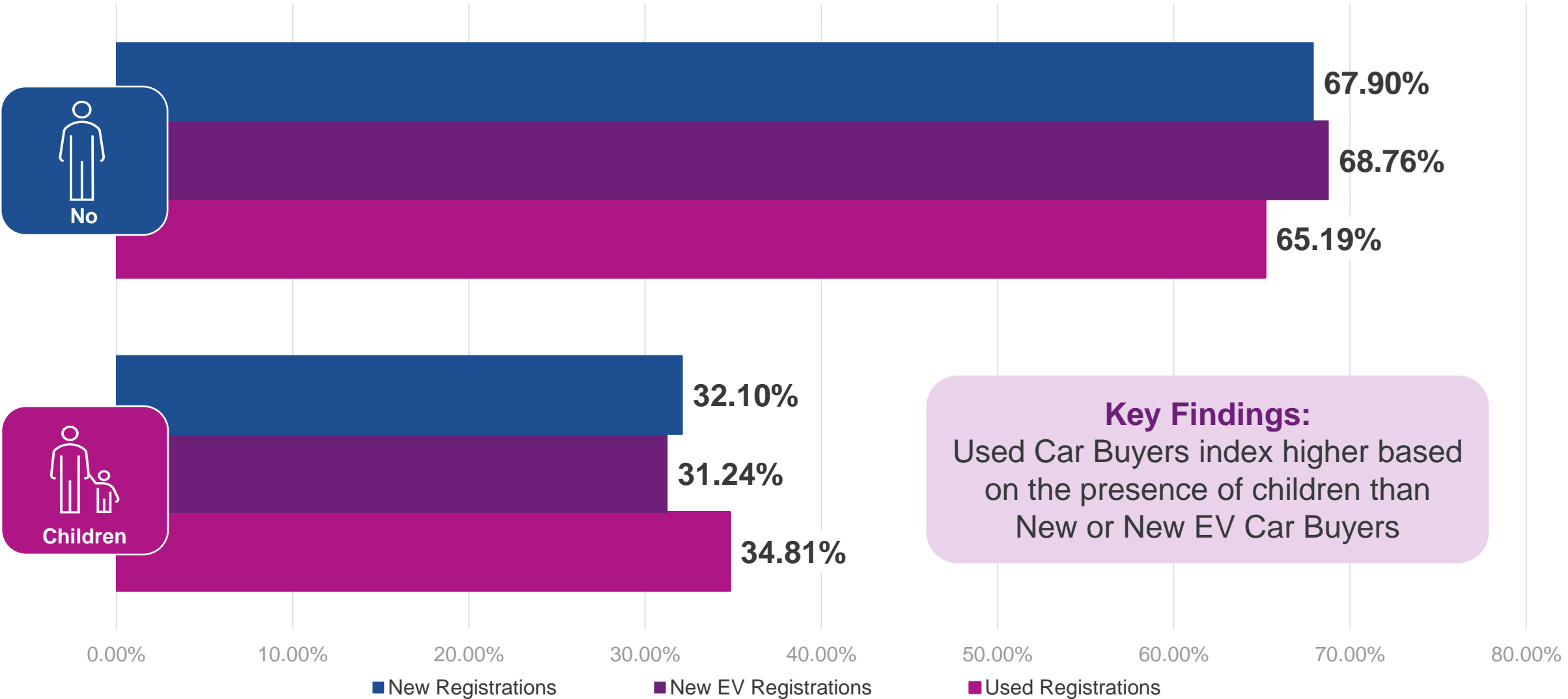
**Key Findings:**  
 Silent & Boomers over-index for New Cars  
 Gen X & Millennials over-index for New EV Cars  
 Gen Z over-indexes for Used Cars



# R12M New Retail Car Registration Market Share % by Gender



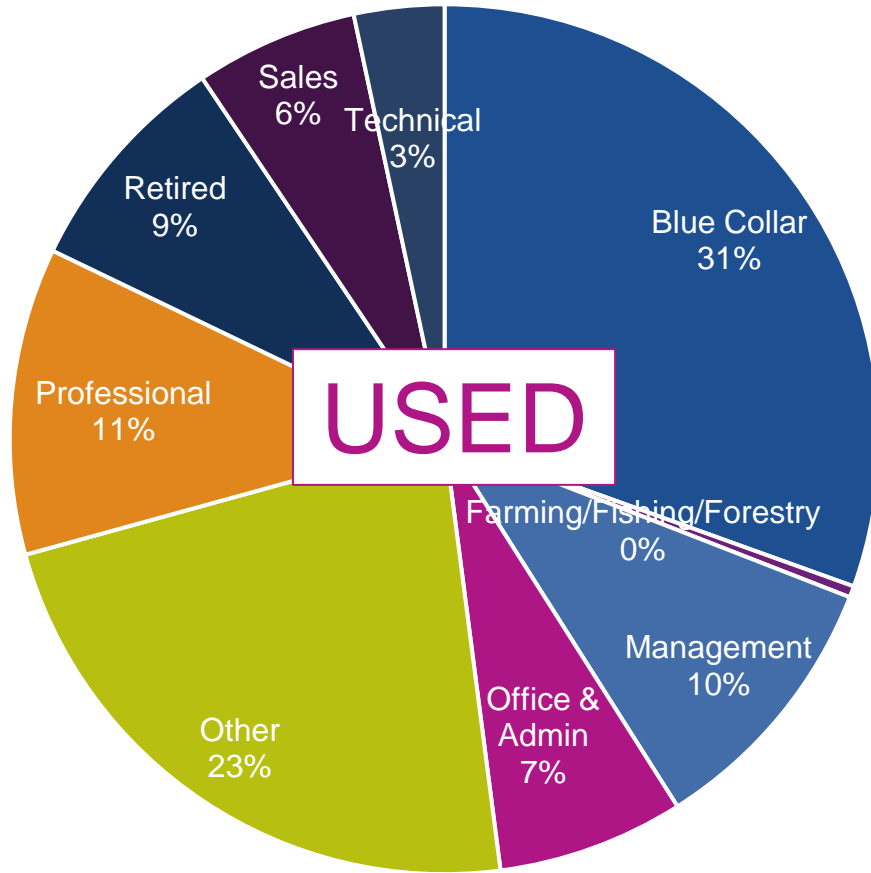
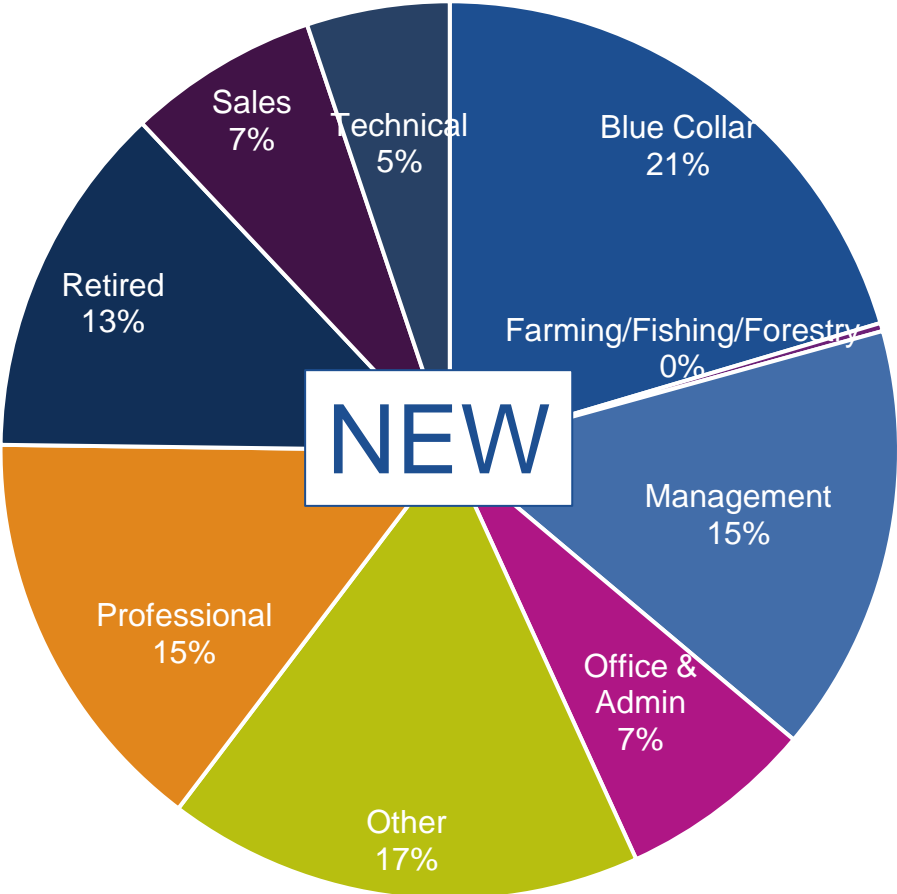
# R12M Retail Car Registration Market Share % by Presence of Children



**Key Findings:**  
 Used Car Buyers index higher based on the presence of children than New or New EV Car Buyers



# R12M Retail Car Registration Market Share % by Buyer Occupation



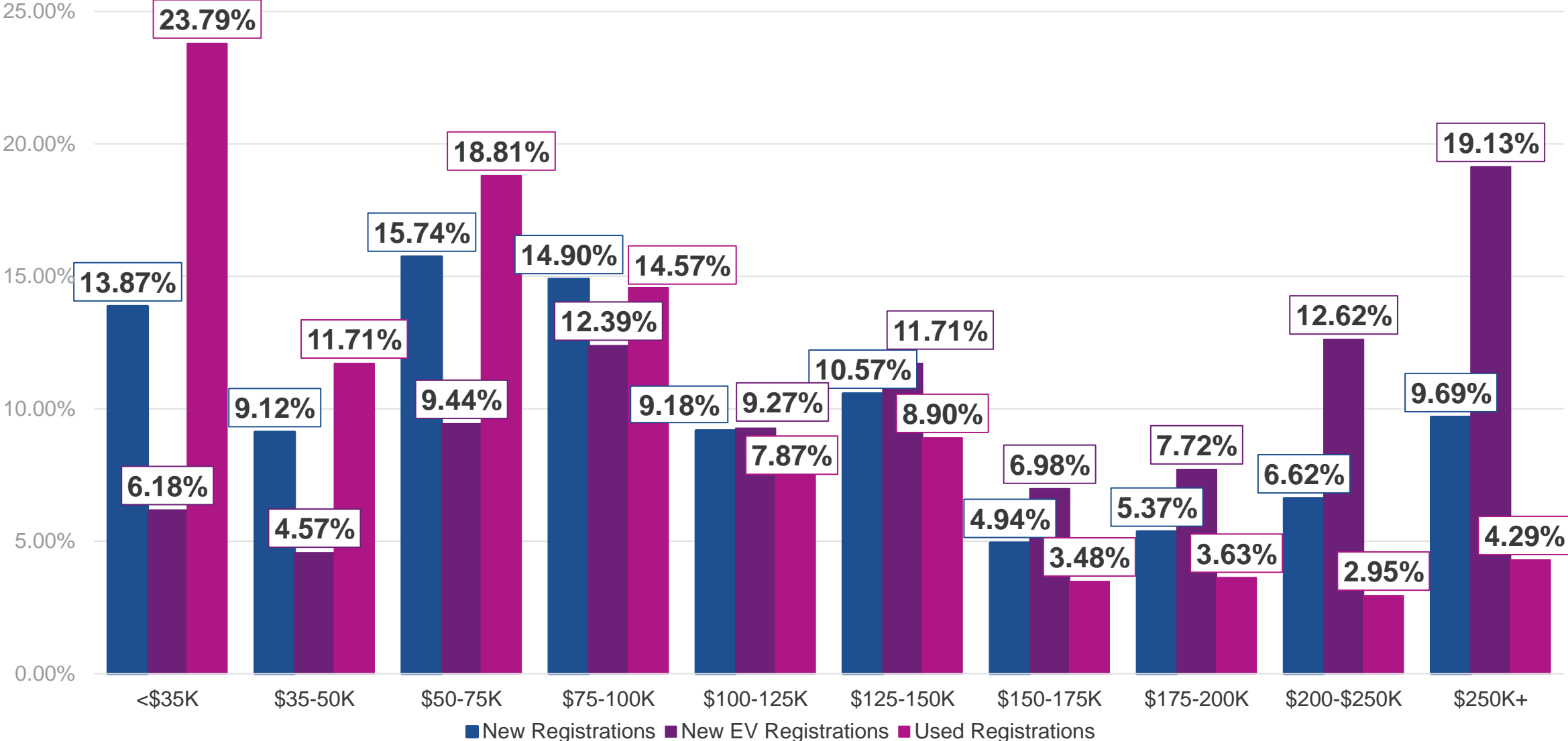
- Blue Collar
- Office & Admin Support
- Retired

- Farming/Fishing/Forestry
- Other
- Sales

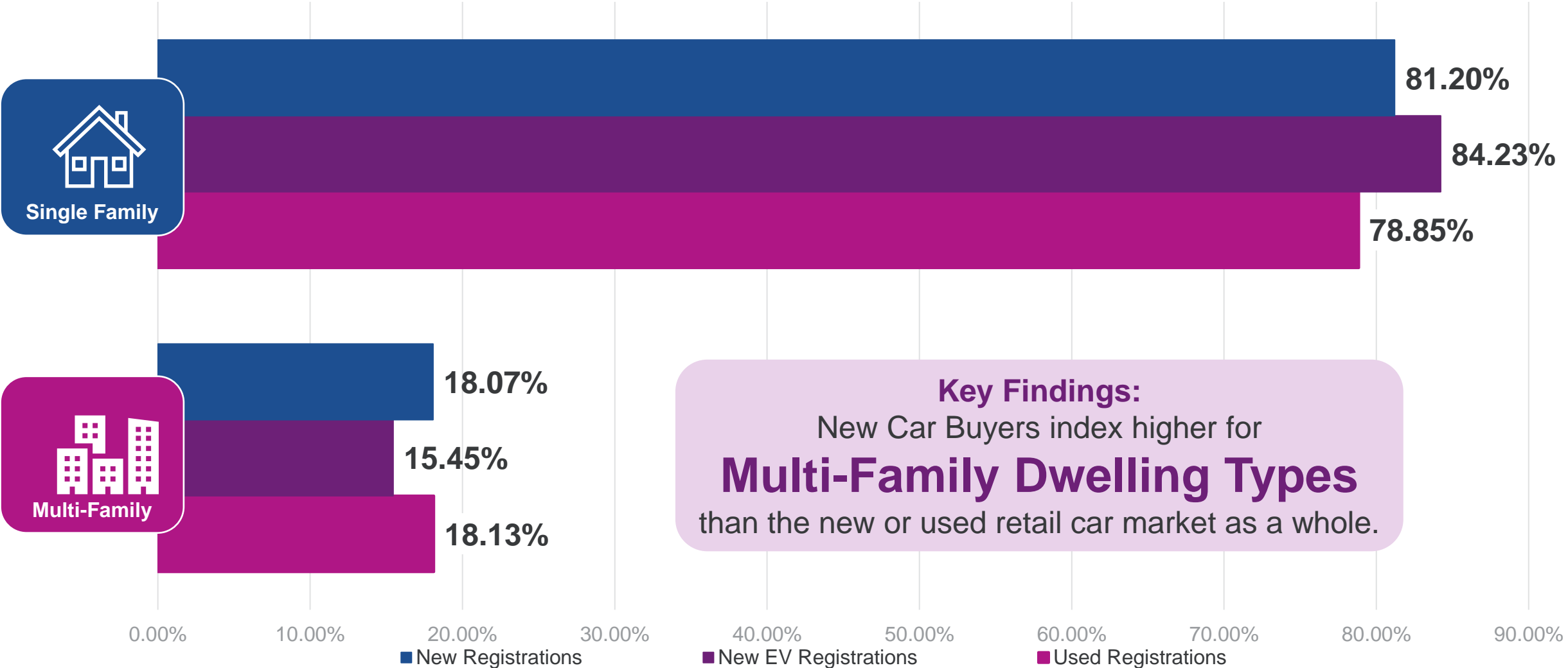
- Management: Business/Financial Ops
- Professional: Legal/Educ/Health/Tech
- Technical: Computers/Architect/Engineer



# R12M Retail Car Registration Market Share % by Household Income

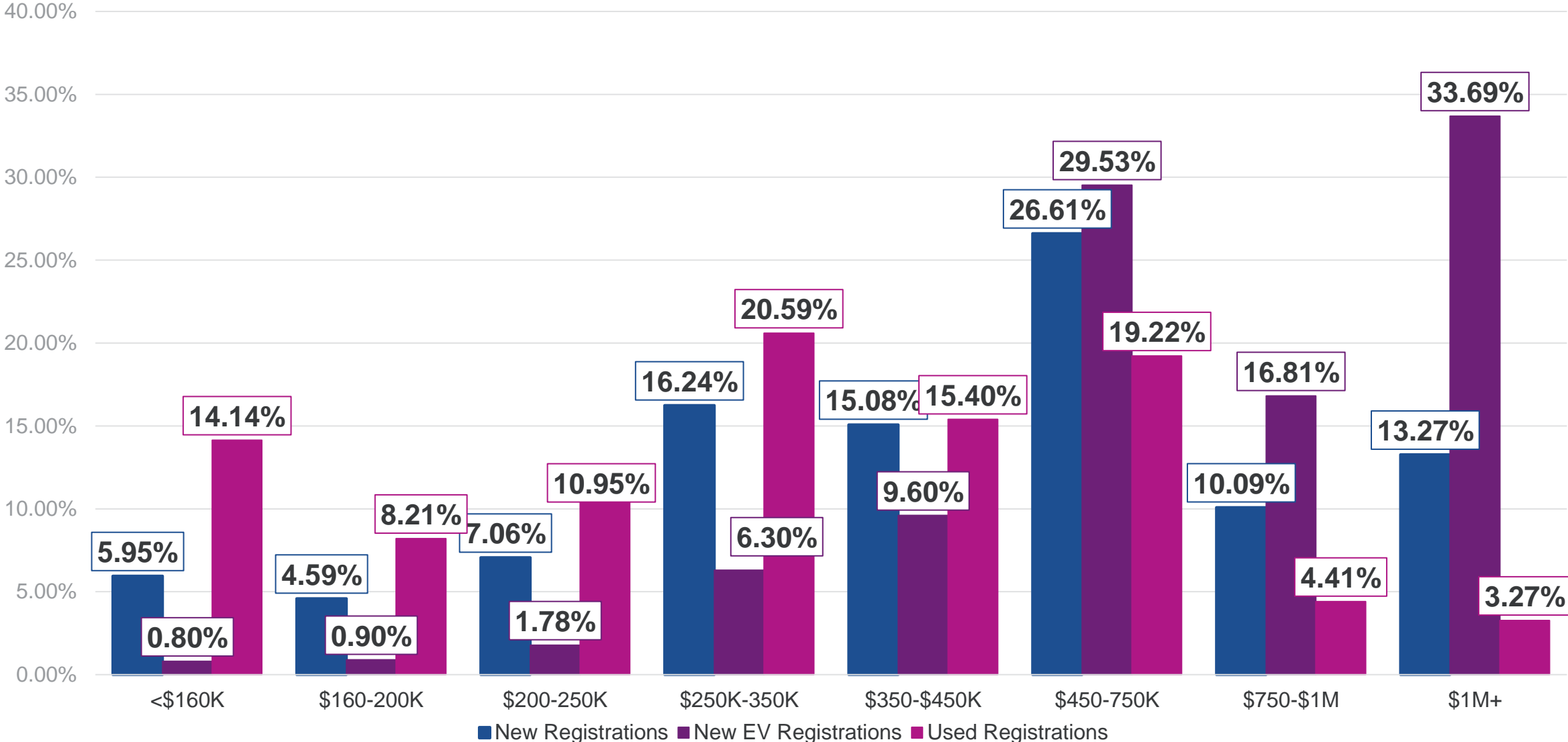


# R12M Retail Car Registration Market Share % by Dwelling Type



**Key Findings:**  
 New Car Buyers index higher for **Multi-Family Dwelling Types** than the new or used retail car market as a whole.

# R12M Retail Car Registration Market Share % by Home Value



# Q4 Demographic Summary Insights



Consumer demographics vary for New, New EV and Used Car Buyers



Targeting specific consumers for your marketing campaigns is critical for success



Leverage psychographic and buying preference insights to further customize your marketing message for Car buyers



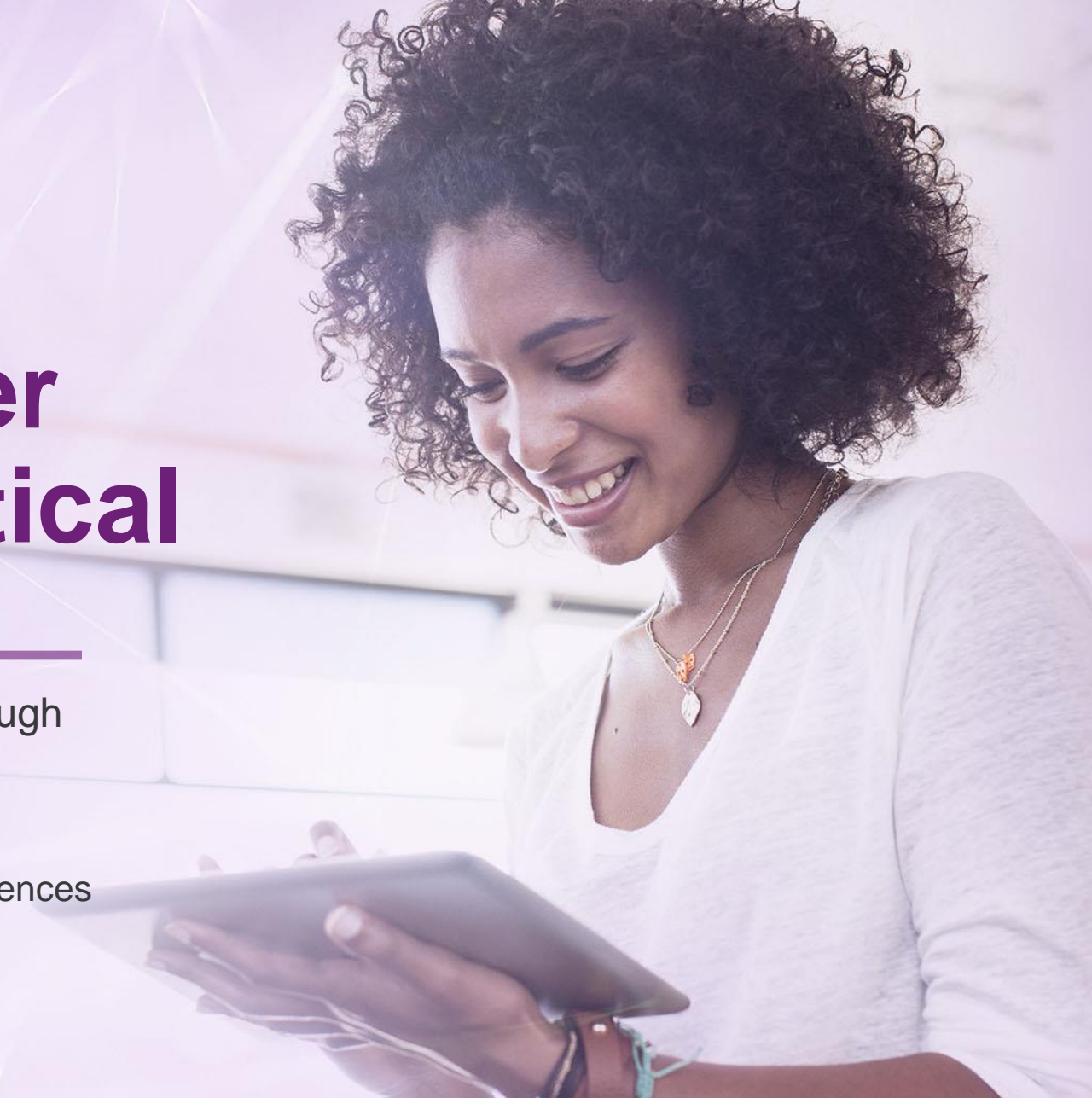
# Q4 2024

## Meaningful Customer Segmentation is Critical

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We deliver household-based lifestyle segmentation through Mosaic® US bringing data to life by highlighting:

- Who consumers are
- Where they live
- How they view the world
- Their financial status
- Their digital lifestyle
- Their communication preferences
- And, more...



# Lifestyle Segmentation for Audience Refinement

Send the right message to the right person, at the right time

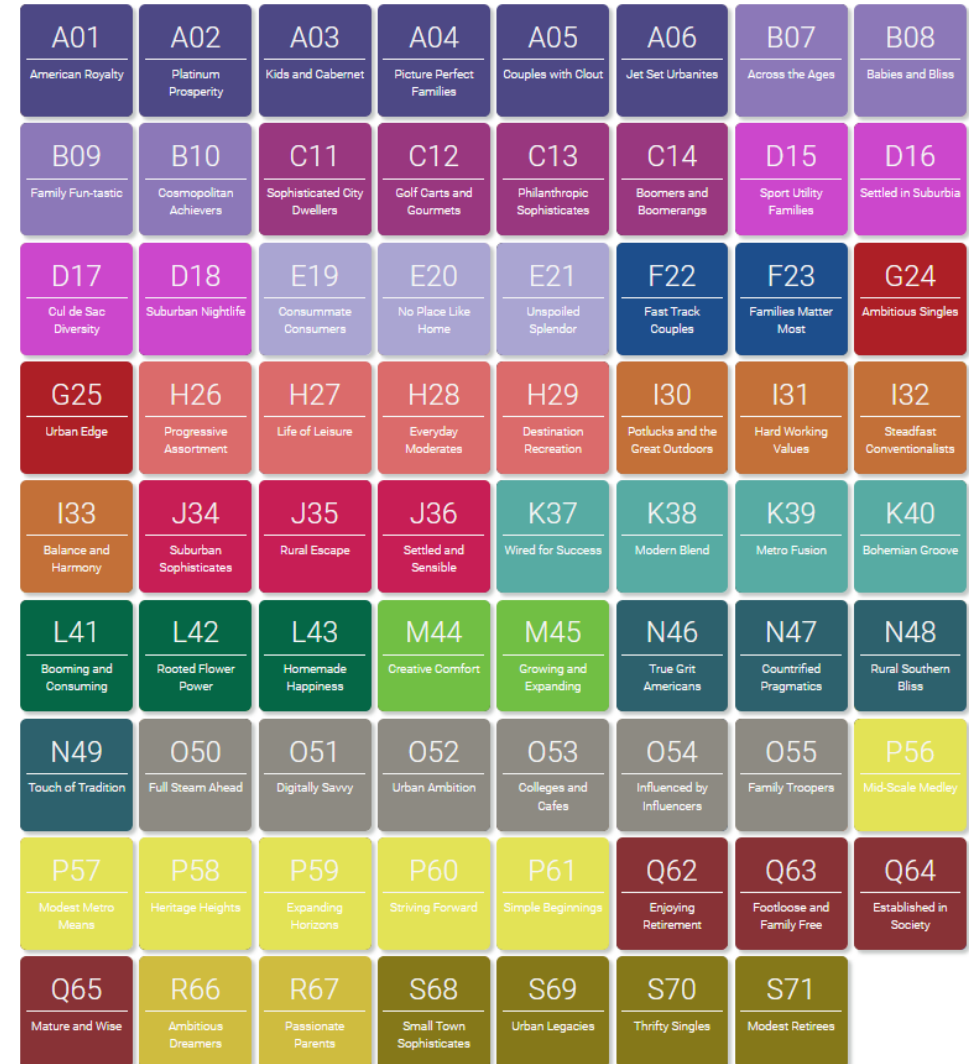
Experian Mosaic divides the marketable U.S. population into **19** Groups and **71** more detailed Types.

It paints a unique picture of consumers based on their demographic characteristics, lifestyles, and behavior.

It can tell you:

- Who your customers are
- How they live
- What they are looking for from you

**Communicate with consumers in a way  
that matches their world!**



# R12M New Retail Car Buyers

## Top 3 Mosaic Lifestyle Segmentation Types

**C13**  
Philanthropic Sophisticates

**A01**  
American Royalty

**B10**  
Cosmopolitan Achievers





# Top 3 Lifestyle Segments for New Retail Car Buyers



**Philanthropic Sophisticates**



**American Royalty**



**Cosmopolitan Achievers**

<b>U.S. Population</b>	11.3M	7.8M	4.7M
<b>% Households</b>	4.09%	2.26%	1.73%
<b>% Individuals</b>	4.92%	3.34%	2.09%

## Overview

Mature, upscale couples and singles in suburban homes

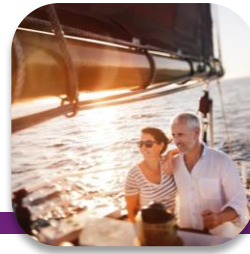
Affluent, influential and successful couples and families living in prestigious suburbs

Affluent middle-aged couples and families enjoying dynamic lifestyles in metro areas

# Top 3 Lifestyle Segments for New Retail Car Buyers



## Philanthropic Sophisticates



## American Royalty



## Cosmopolitan Achievers

### General Insights

- Retiring in Comfort
- Experienced Travelers
- Art connoisseurs
- Philanthropic

- Prestigious housing
- Luxury living
- Upscale cars
- Healthy lifestyles

- Bilingual
- Luxury living
- Soccer fans
- Two family properties

### Technology Adoption



Apprentices



Journeyman



Journeyman

# Top 3 Lifestyle Segments for New Retail Car Buyers



**Philanthropic Sophisticates**



**American Royalty**



**Cosmopolitan Achievers**

## Top Buying Style

Brand Loyalists

Quality Matters

Quality Matters

## Top 3 Channel Preferences

- TV
- Direct Mail
- Radio
- SMS
- Email
- Social



# R12M Used Car Buyers

## Top 3 Mosaic Lifestyle Segmentation Types

**O51**  
Digitally Savvy

**F22**  
Fast Track Couples

**O54**  
Influenced by Influencers



# Q4 Summary Insights – New Car Buyers



## Philanthropic Sophisticates

1. #1 Lifestyle Segment for New Car Buyers
2. Brand Loyalists
3. Email #1



## American Royalty

1. #2 Lifestyle Segment for New Car Buyers
2. Quality Matters
3. Email #1



## Cosmopolitan Achievers

1. #3 Lifestyle Segment for New Car Buyers
2. Quality Matters
3. TV #1

# Q4 2024 Case Study




- New, Retail Car:  
**Kia Forte**
- #1 New, Retail Car Buyer Lifestyle Segment:  
**Digitally Savvy**



# #1 Lifestyle Segment for New, Retail Kia Forte Buyers

**Mosaic Group O: Singles and Starters. Mosaic Type O51: Digitally Savvy**

O51: Young singles who live digital-driven smaller city lifestyles.



### Key Features

- Ambitious
- Video gamers
- Single adults
- Eager to spend
- Unlikely to own regular cars
- Likely to be in the market to buy used vehicles

### Who We Are


<b>Head of household age</b> 25-30 613   49.6%	<b>Type of property</b> Single family 100   88.5%
<b>Est. Household income</b> \$50,000-\$74,999 136   25.4%	<b>Purchase/lease price</b> \$20,000-\$30,000 36   6.2%
<b>When purchased</b> 7-12 months ago 137   57.3%	<b>Vehicle age</b> 11+ years 76   48.8%


### Channel Preference

TV: 127	Email: 79	Direct Mail: 198
Text: 189	@: 14	Like: 30

### Technology Adoption

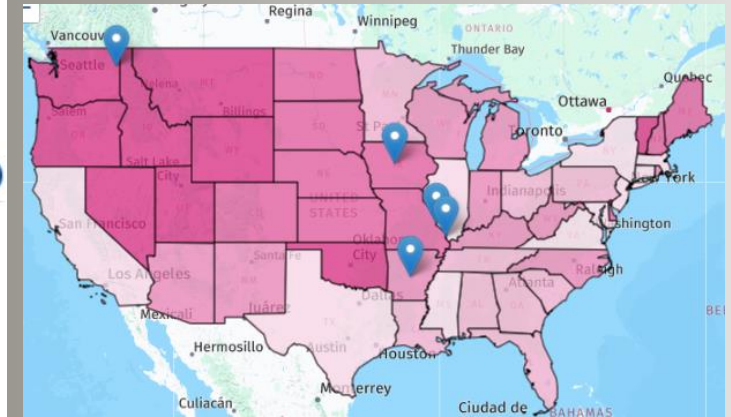
Wizards





### Experian Marketing Data

Population: 6.3M	Direct Mail: 4.1M	Email: 0.9M	Digital: 28.7M
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# Q4 Vehicle Summary Insights



## What are they driving

- Cars represent 18+% of new, retail registrations
- Toyota is the market share leader for new, retail car registrations by make
- The Toyota Camry was the most registered new, retail car in the last 12M registrations



## Who are they

- Gen X and Millennials over-index for new, retail electric cars
- Gen Z over-indexes for used, retail cars
- Men over-index for new, retail electric cars



## How to Market to them

- Customize your message and delivery to your market / buyer
- Email and social are the top channel preferences for the 1<sup>st</sup> and 2<sup>nd</sup> type of the Top 3 lifestyle segments
- TV is the top preference for the 3<sup>rd</sup> type of the Top 3 lifestyle segments



# 💡 Turn Car Buyer Insights into Advertising Action with Experian and The Trade Desk

The Trade Desk leverages the insights from the Automotive Consumer Trends reports to create a comprehensive omnichannel strategy for reaching in-market car buyers.

[Click here to access the eBrochures to help you turn advertising insights into advertising action.](#)

experian. | theTradeDesk®

experian. EXPERIAN AUTOMOTIVE  
Sport Utility Vehicle (SUV) Audience Insights

What do we know about new, retail SUV registrations and the consumers who are in-market to buy them?

theTradeDesk

experian. EXPERIAN AUTOMOTIVE  
Van Audience Insights

What do we know about retail van registrations and the consumers who are in-market to buy them?

theTradeDesk

experian. EXPERIAN AUTOMOTIVE  
Electric Vehicle Audience Insights

What do we know about retail electric vehicles and the consumers in-market to buy them?

theTradeDesk

experian. EXPERIAN AUTOMOTIVE  
Crossover Utility Vehicle Audience Insights

Insights about new, retail CUV registrations and in-market consumers.

theTradeDesk

New, Retail Individual Registrations for April 12 Monthly

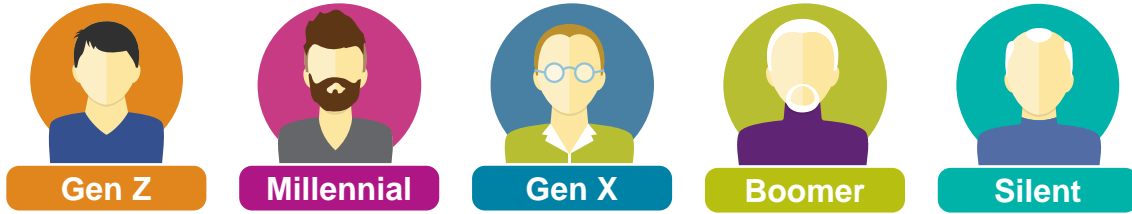
- 16.9M New, Retail Registrations
- 81% New, Retail Registrations are CUVs

Attributes of In-Market Buyers

- Top Web Content Preferences
- Preferred Websites / Apps
- Top CTV Series
- Top Audio Series
- Channel Distribution Snapshot

Click to access eBrochures

# Special Report: Generational Insights



## GET ACCESS TO THE **Special Report** Generational Insights

Automotive Market Insights for the Gen Z, Millennial, Gen X, Baby Boomer and Silent Generations.

[Click to access Special Report](#)



Automotive Consumer Trends

# Special Report: Used Vehicle Insights



GET ACCESS TO THE

## Special Report Used Vehicle Insights

Automotive Market Insights for Used Vehicles Registrations.

[Click to access Special Report](#)



 **Save the date**



SAVE THE DATE:  
**June 2025**



AUTOMOTIVE CONSUMER  
TRENDS REPORT:  
**Q1 2025  
SUVs**





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