



EXPERIAN AUTOMOTIVE

Q3 2025

Automotive Consumer Trends & Analysis

Kirsten Von Busch
Director, Product Marketing
December 16, 2025

Q3 Report overview



Trucks – Q3 2025

What light duty trucks are on the road, have been sold, and who is buying them?

Source: Vehicles in Operation overview and Consumer Analysis by vehicle type for U.S. light duty vehicles through September 30, 2025.

R12M = The last 12 months; October 2024 - September 2025

Light Truck = GVW 1-3

Today's presenter



Kirsten Von Busch

Director of Automotive Product Marketing
Experian Automotive

Kirsten Von Busch has over 20 years of experience in the auto industry. As Product Marketing Director for the Experian Automotive team, she supports solutions in the commercial automotive space, including the AutoCheck® vehicle history report and the Experian Marketing Engine. Von Busch also delivers Experian's Automotive Consumer Trends Quarterly Report.

Delivering high-quality automotive intelligence

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



VEHICLE DATA

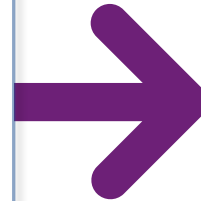


CONSUMER DATA



CREDIT DATA

These 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.



North American Vehicle DatabaseSM

963M+

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

340M+

U.S. VIO.

28.7M+

Canadian VIO.

21.8B+

Vehicle history records.

438M+

Title Brands.

402M+

Accident & damage related events.

287M+

Recall events.



Consumer ViewSM Marketing Database

250M+

Individuals.

126M+

Households.

5000

Consumer attributes.

490M

Mobile IDs.

200M+

Connected TV IDs.

750M

Hashed email.

2,400+

Audience segments including 750+ Auto Audiences.



File OneSM 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+

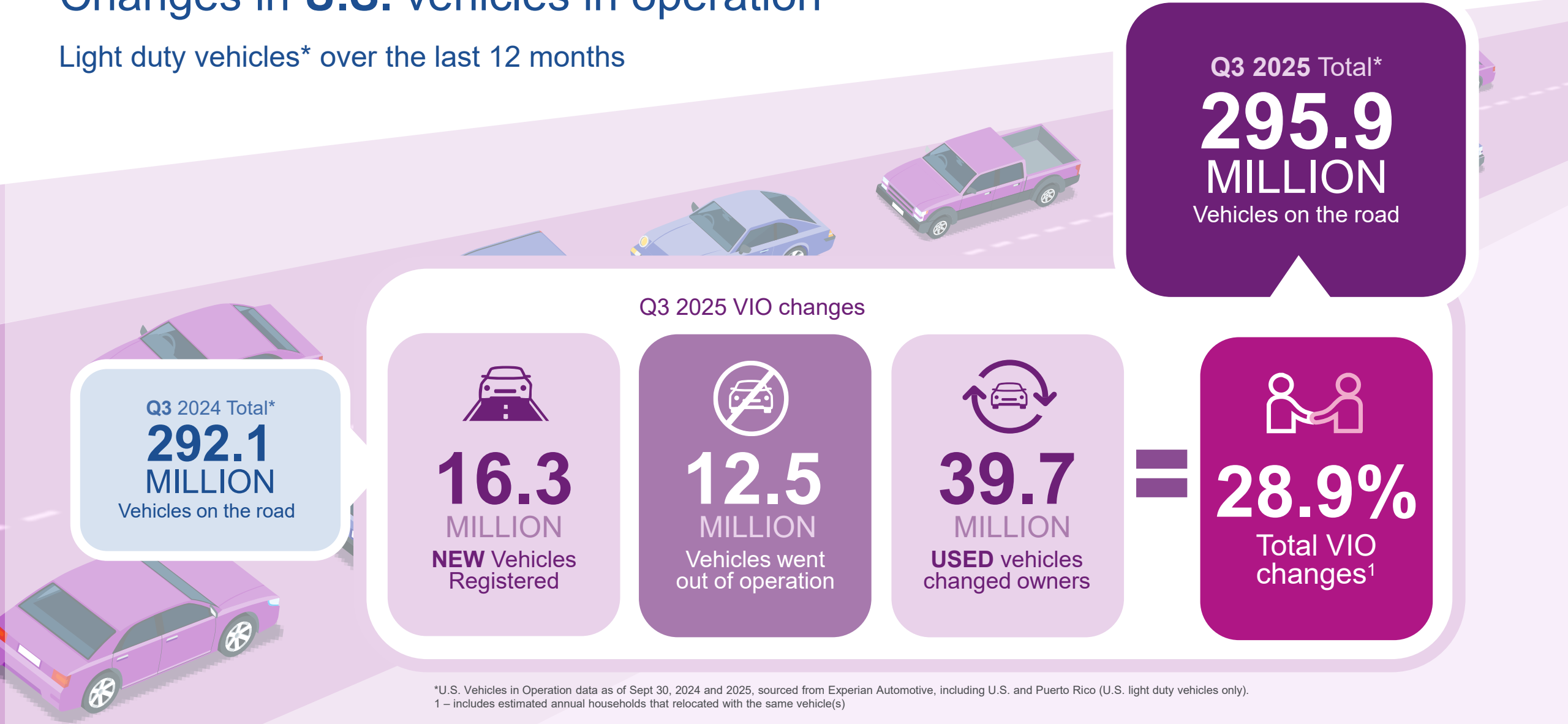
Q3 2025 Truck Registrations

- How many trucks are on the road in the U.S.?
- How many, and what types of, new and used light-duty trucks have been registered in the last 12 months by vehicle class, segment, sub-segment, make, model and geography?



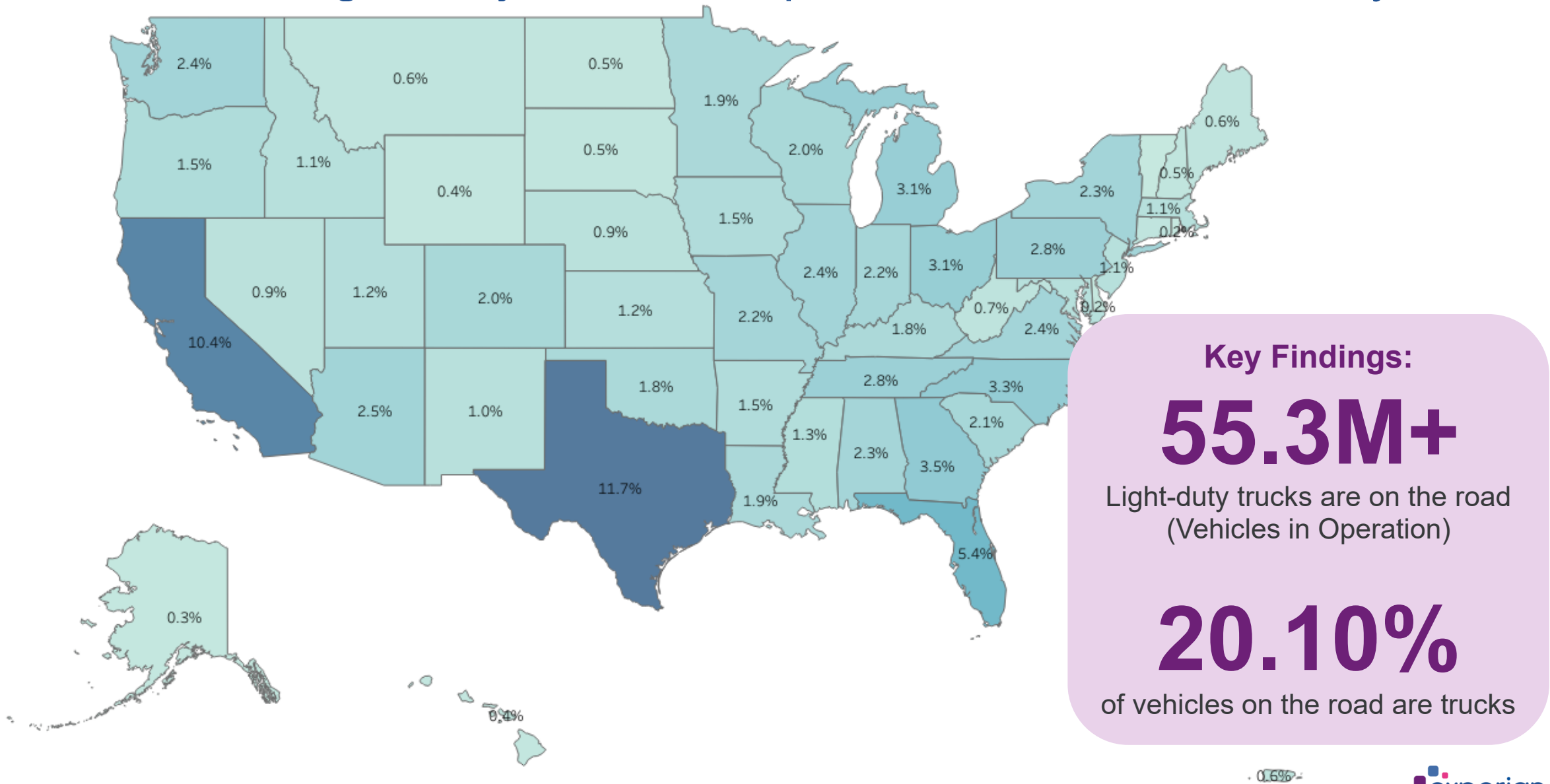
Changes in U.S. vehicles in operation

Light duty vehicles* over the last 12 months



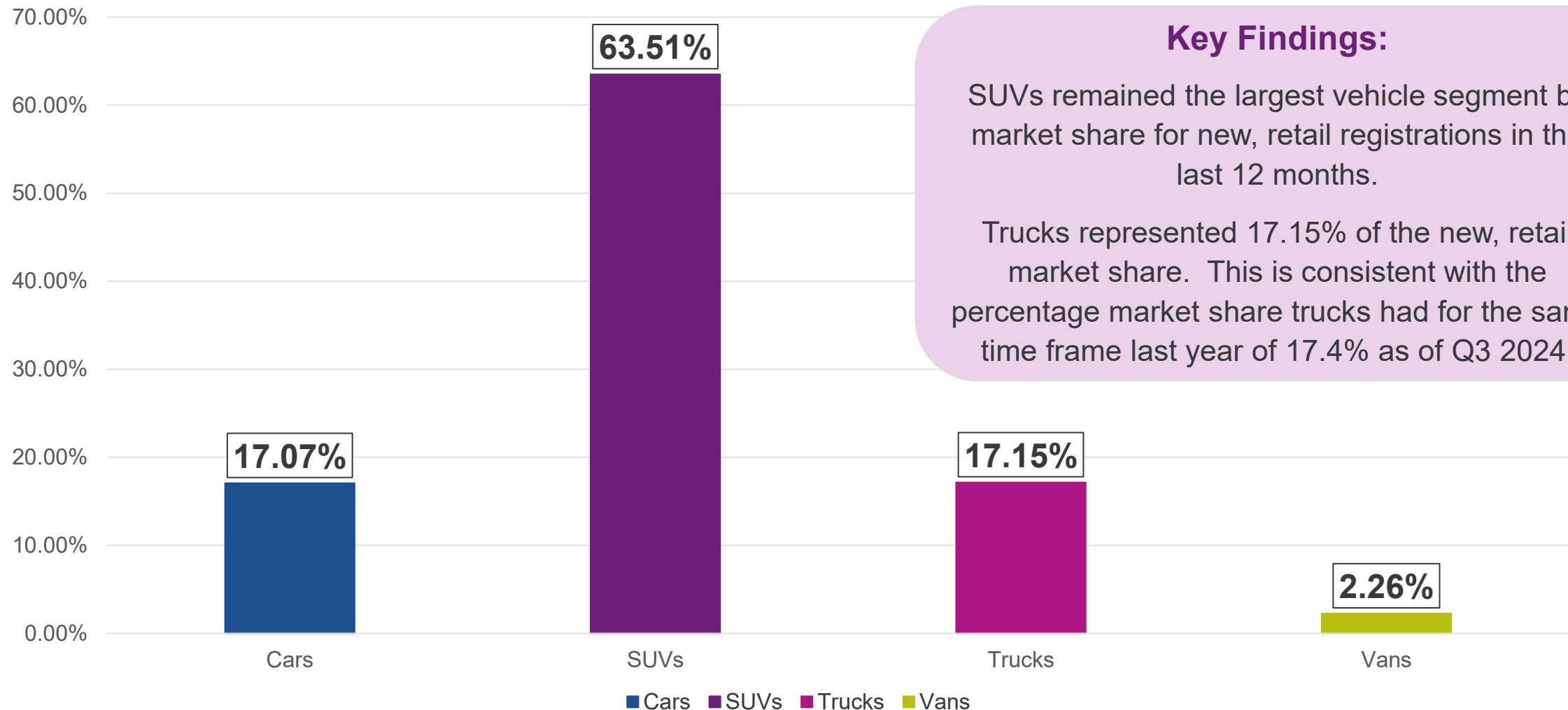
*U.S. Vehicles in Operation data as of Sept 30, 2024 and 2025, sourced from Experian Automotive, including U.S. and Puerto Rico (U.S. light duty vehicles only).
1 – includes estimated annual households that relocated with the same vehicle(s)

Q3 2025 U.S. Light-Duty Trucks in Operation Market Share % by State

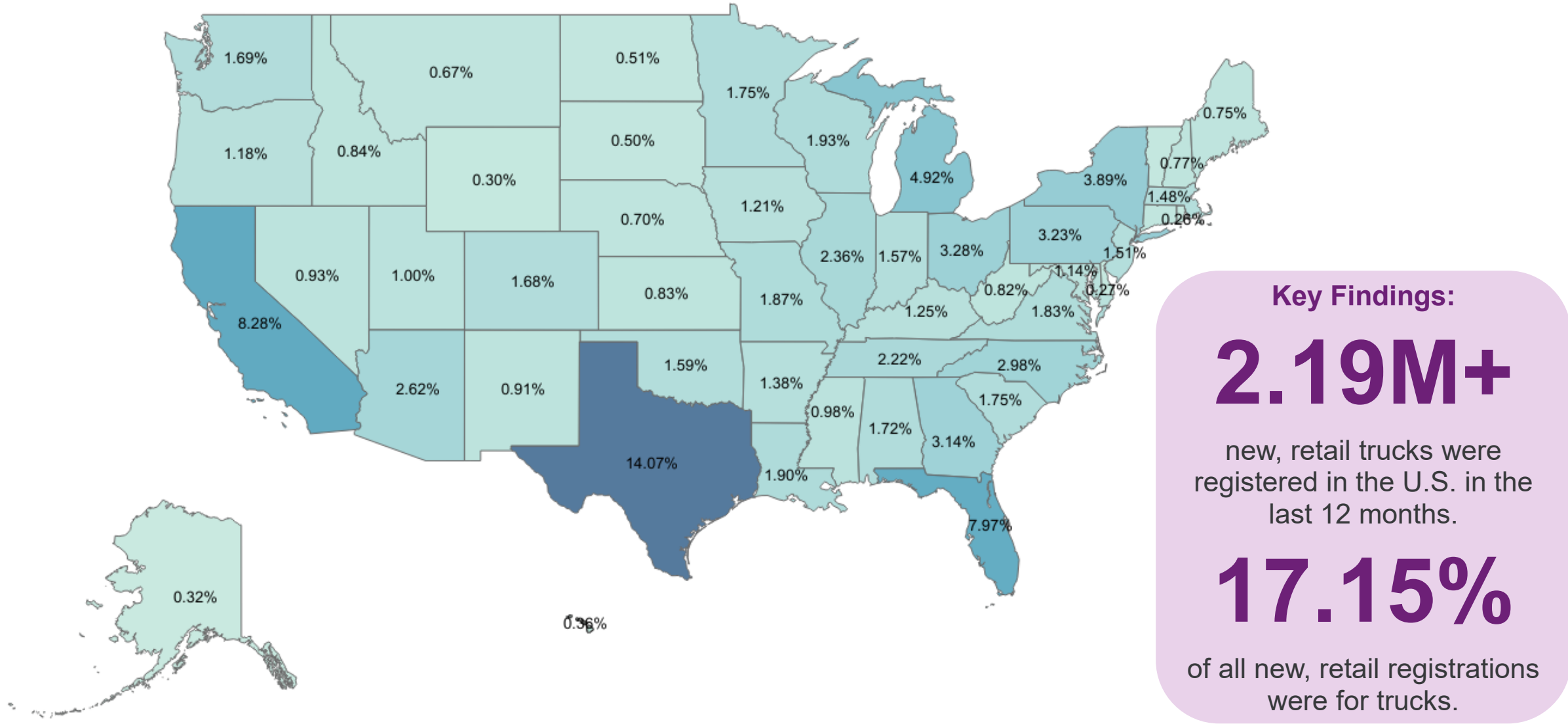


R12M New, Retail Registrations Market Share %

By Vehicle Segment



R12M U.S. New, Retail Truck Registration % by State



R12M Top U.S. DMAs for New, Retail Light Duty Truck Registrations

New, Retail DMA Rankings:

1.	New York, NY	851K+
2.	Los Angeles, CA	787K+
3.	Dallas-Ft Worth, TX	363K+
4.	Chicago, IL	341K+
5.	Miami-Ft. Lauderdale, FL	337K+
6.	Houston, TX	314K+
7.	Philadelphia, PA	304K+
8.	Boston (Manchester), MA	291K+
9.	San Francisco-Oak-San Jose, CA	287K+
10.	Detroit, MI	286K+



New, Retail, Truck DMA Rankings:

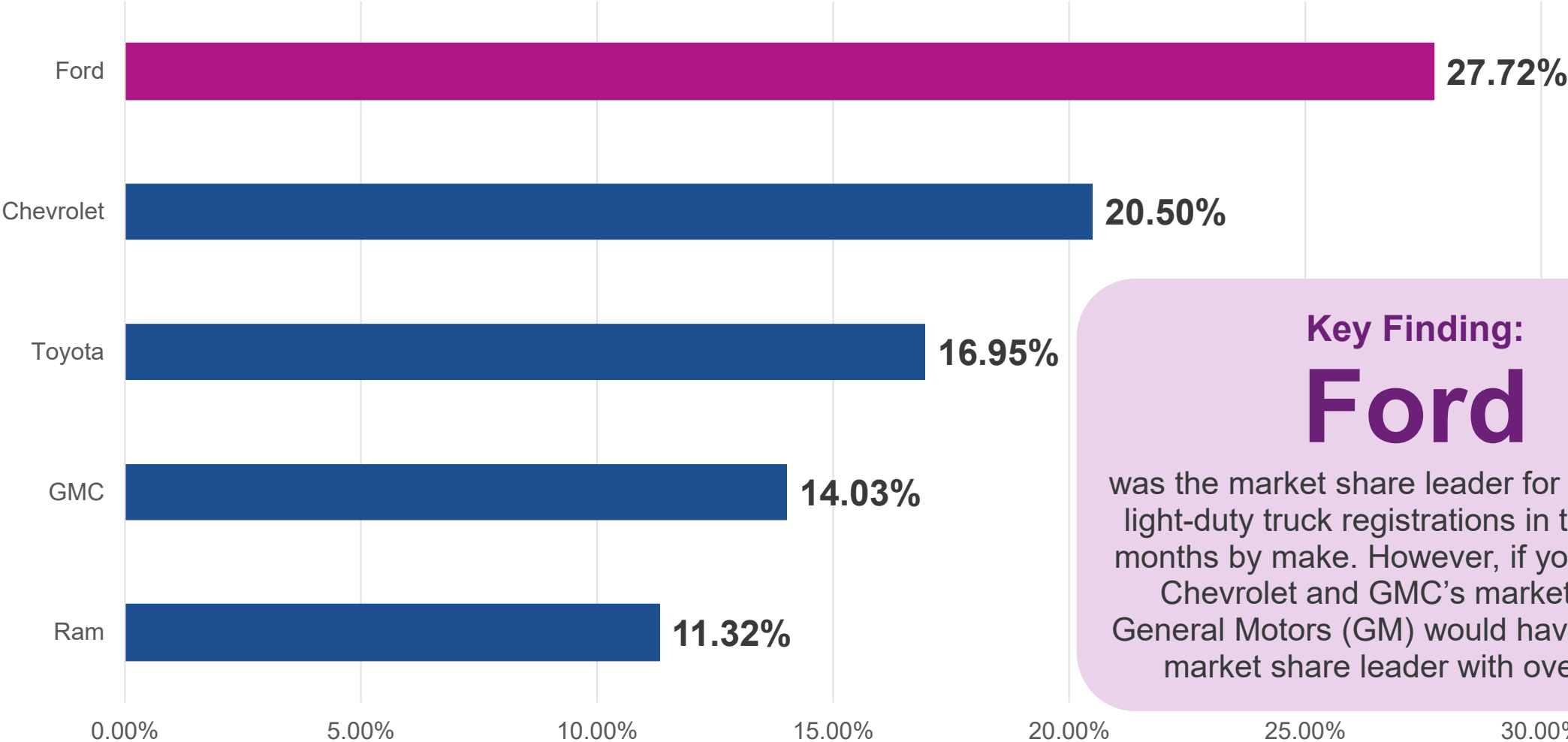
1.	Los Angeles, CA	84K+ ↑
2.	Dallas-Ft Worth, TX	74K+ ↑
3.	Houston, TX	68K+ ↑
4.	Detroit, MI	62K+ ↑
5.	New York, NY	54K+ ↓
6.	Phoenix (Prescott), AZ	46K+ ↑
7.	Tampa–St. Pete (Sarasota), FL	43K+ ↑
8.	Atlanta, GA	40K+ ↑
9.	Boston, MA (Manchester)	37K+ ↓
10.	Orlando-Daytona Bch-Melbrn; FL	35K+ ↑

↑ the DMA ranked **higher** for **trucks** than the overall new, retail DMA ranking

↓ the DMA ranked **lower** for **trucks** than the overall new, retail DMA ranking

R12 Top 5 New, Retail Truck Registration Market Share %

Light duty trucks by vehicle make



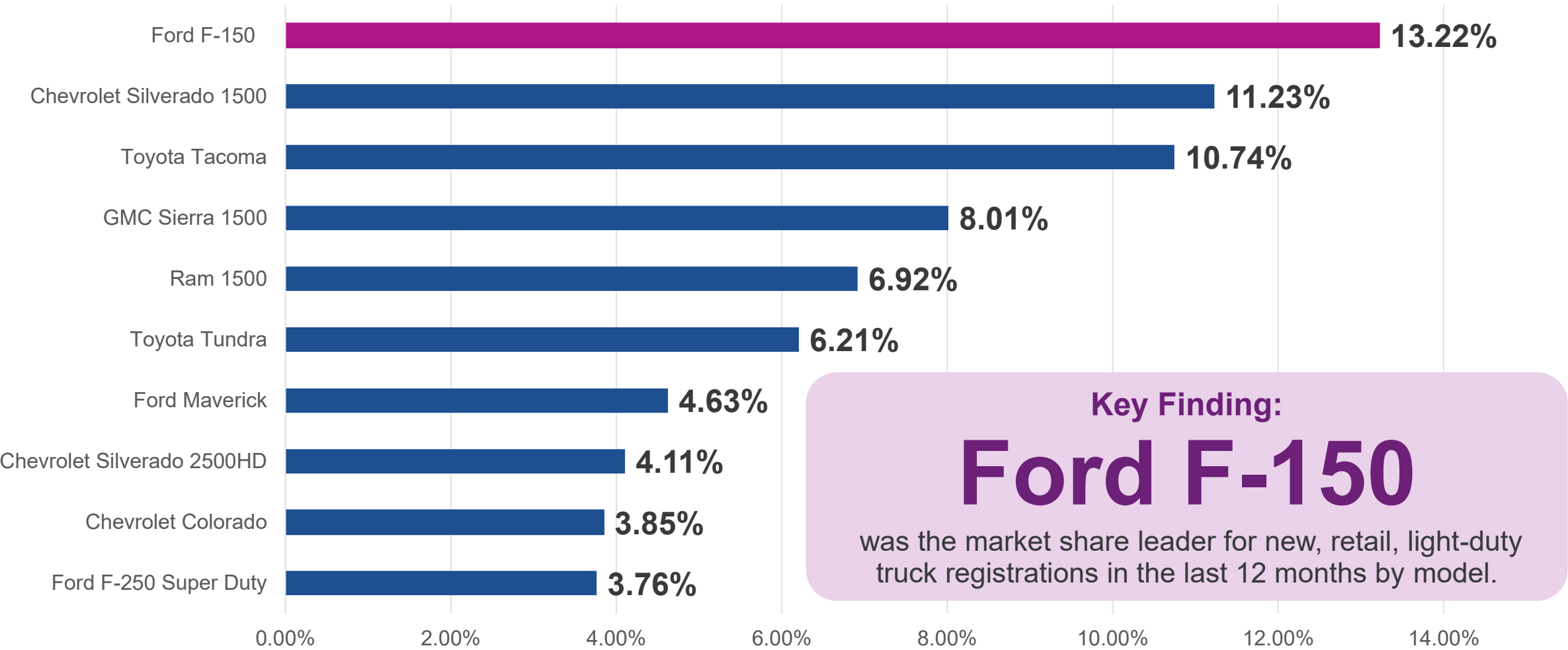
Key Finding:

Ford

was the market share leader for new, retail, light-duty truck registrations in the last 12 months by make. However, if you combine Chevrolet and GMC's market share, General Motors (GM) would have been the market share leader with over 34%.

R12M Top 10 New, Retail Truck Registration Market Share %






Light duty trucks by vehicle model



R12 Top 5 Truck Market Share % Overview by Model






New, retail light-duty registrations by vehicle class

Trucks accounted for
17.15%
of new, retail registrations
in the last 12 Months

	 Ford F-150	 Chevrolet Silverado 1500	 Toyota Tacoma	 GMC Sierra 1500	 Ram 1500
New, Retail Registration Market Share %	2.26%	1.92%	1.84%	1.37%	1.18%
New Truck Registration Market Share %	13.22%	11.23%	10.74%	8.01%	6.92%

What Model Did Each Vehicle Replace?

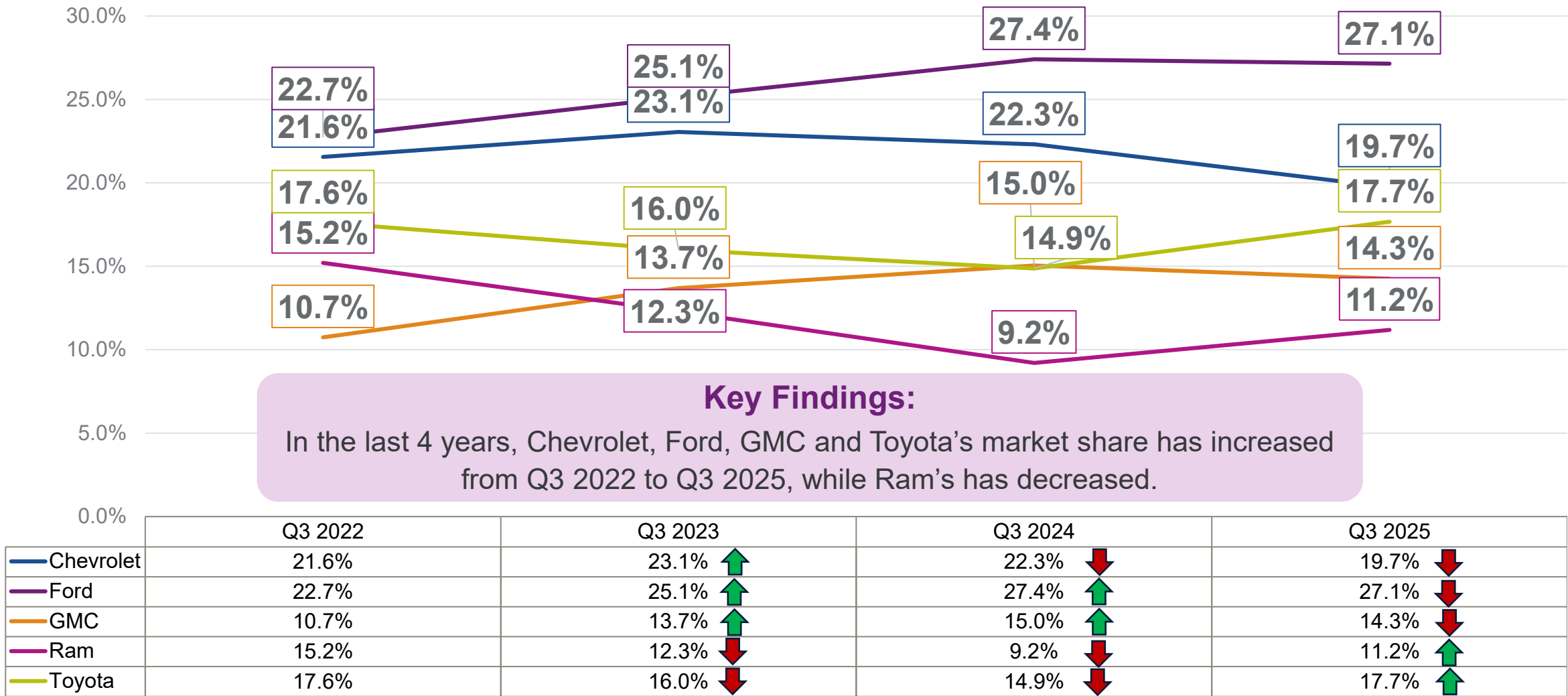
Data includes new-to-new vehicle purchases using Experian disposal methodology for the last 12 months

									
Ford F-150		Chevrolet Silverado 1500		Toyota Tacoma		GMC Sierra 1500		Ram 1500	
Including Ford Models		Including Chevrolet Models		Including Toyota Models		Including GMC Models		Including Ram Models	
Ford F-150	52.45%	Chevrolet Silverado 1500	43.36%	Toyota Tacoma	35.47%	GMC Sierra 1500	34.02%	Ram 1500	44.64%
Ford F-250 Super Duty	3.09%	Chevrolet Silverado 1500 Limited	5.41%	Toyota RAV4	6.18%	GMC Sierra 1500 Limited	3.25%	Ram 1500 Classic	3.19%
Ford Explorer	2.84%	Chevrolet Colorado	4.12%	Toyota Camry	5.00%	GMC Canyon	2.55%	Ram 2500	2.83%
Ford Ranger	2.00%	Chevrolet Silverado 2500HD	2.71%	Toyota Tundra	4.85%	GMC Sierra 2500HD	2.38%	Ram 3500	0.70%
Ford Bronco	1.21%	Chevrolet Equinox	2.14%	Toyota Corolla	3.17%	GMC Acadia	1.89%	Ram ProMaster 2500	0.02%
All Models		All Models		All Models		All Models		All Models	
Chevrolet Silverado 1500	3.08%	Ford F-150	3.69%	Ford F-150	2.06%	Chevrolet Silverado 1500	12.96%	Ford F-150	4.73%
Ram 1500	2.56%	GMC Sierra 1500	3.68%	Chevrolet Silverado 1500	1.69%	Ford F-150	5.89%	Chevrolet Silverado 1500	3.85%
GMC Sierra 1500	1.75%	Ram 1500	2.98%	Ram 1500	1.20%	Ram 1500	3.46%	Jeep Gladiator	2.33%
Toyota Tacoma	1.64%	Toyota Tacoma	1.40%	Honda Civic	1.17%	Toyota Tundra	1.54%	Jeep Grand Cherokee	2.14%
Toyota Tundra	1.13%	Toyota Tundra	1.00%	Nissan Frontier	1.04%	Toyota Tacoma	1.34%	GMC Sierra 1500	1.84%

Top 5
Inflows including
in-brand models

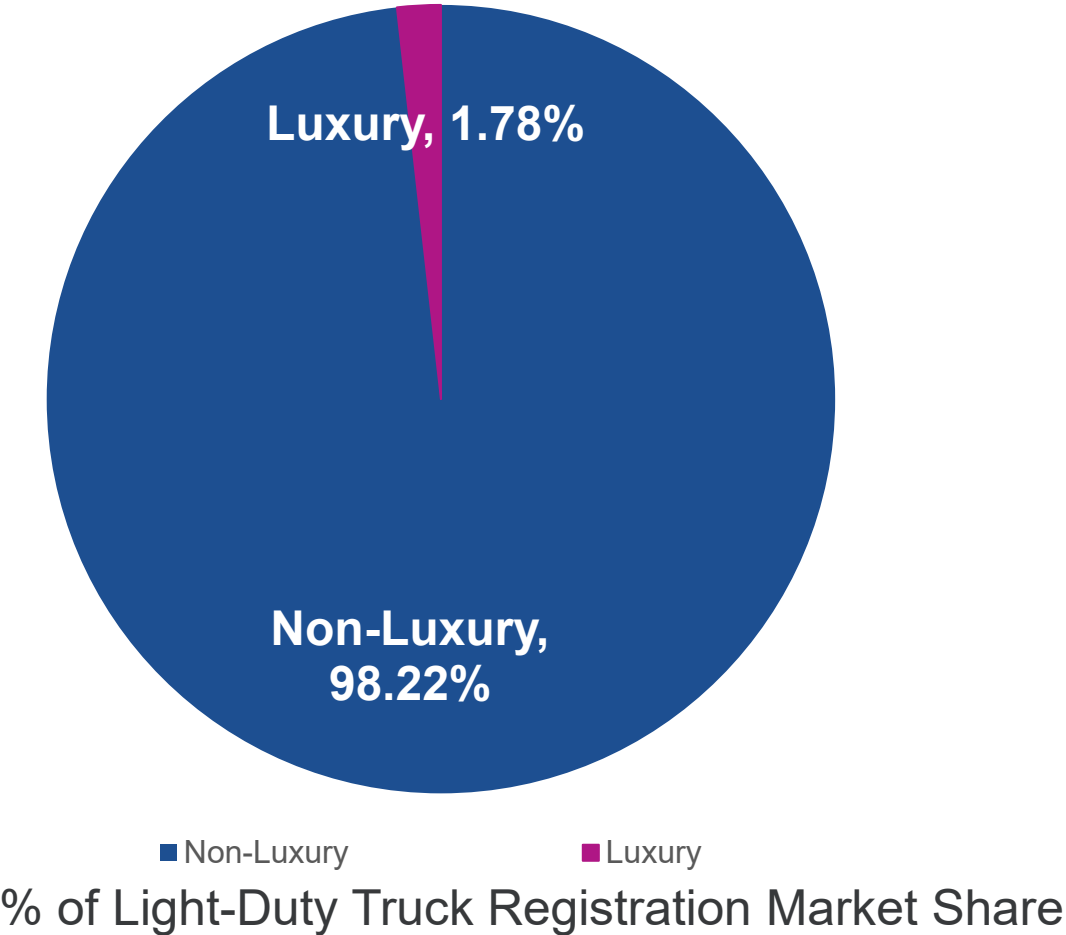
Top 5
Inflows from
all makes

Q3 Top 5 New, Retail, Light-Duty Truck Registration Market Share % by Make for the Last 4 Years (Q3 = July, August, September)



R12M New, Retail, Light-Duty Truck Registration Market Share %

By Vehicle Class: Non-Luxury and Luxury Vehicles (Note: there are no exotic trucks)



Key Findings:

Non-Luxury Trucks accounted for

98.22%

of new, retail registrations in the last 12 Months.

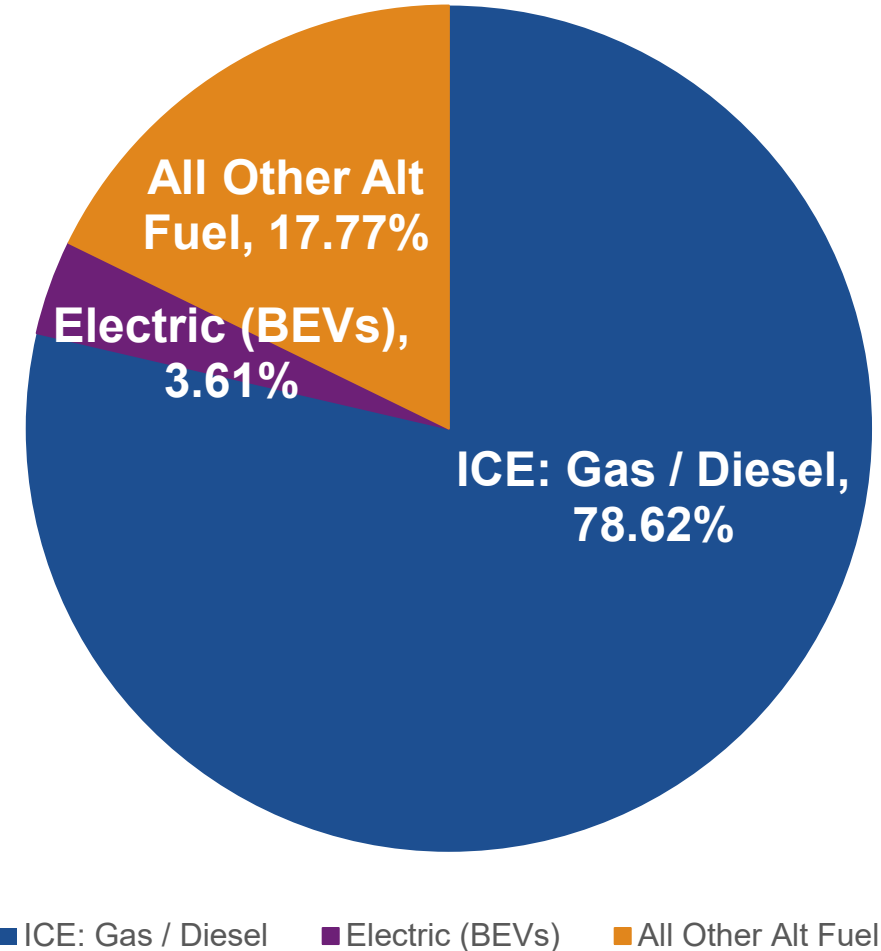
Luxury Trucks accounted for

1.78%

This was largely driven by the classification of Tesla Cybertruck registrations as Luxury vehicles.

R12 New, Retail Registration Market Share %

By Fuel Type (Electric = Battery EVs. All Other Alt Fuel = PHEVs, Hybrid, etc.)



Key Findings:

ICE: Gas/Diesel trucks accounted for

78.62%

of new, retail registrations in the last 12 months by fuel type.

Electric trucks (BEVs) accounted for

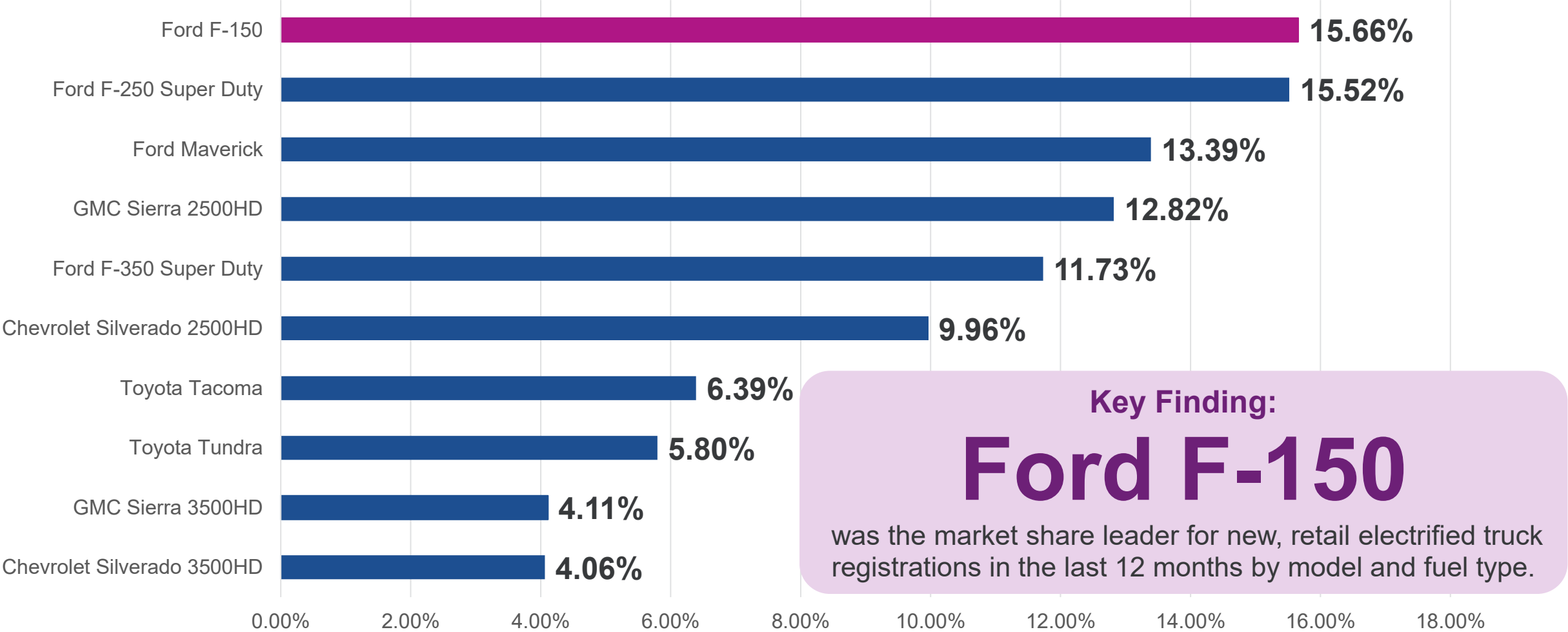
3.61%

Other Alternative Fuel trucks accounted for

17.77%

R12M Top 10 New, Retail Electrified Truck Registration Market Share %

By Light-Duty Truck Models and BEV and All Other Alt Fuel Type (PHEV, Hybrid, etc)



Household Share of Garage – Truck Owners

Key Findings:

34.03%

of U.S. households with 1 or more vehicle, have a light-duty pickup

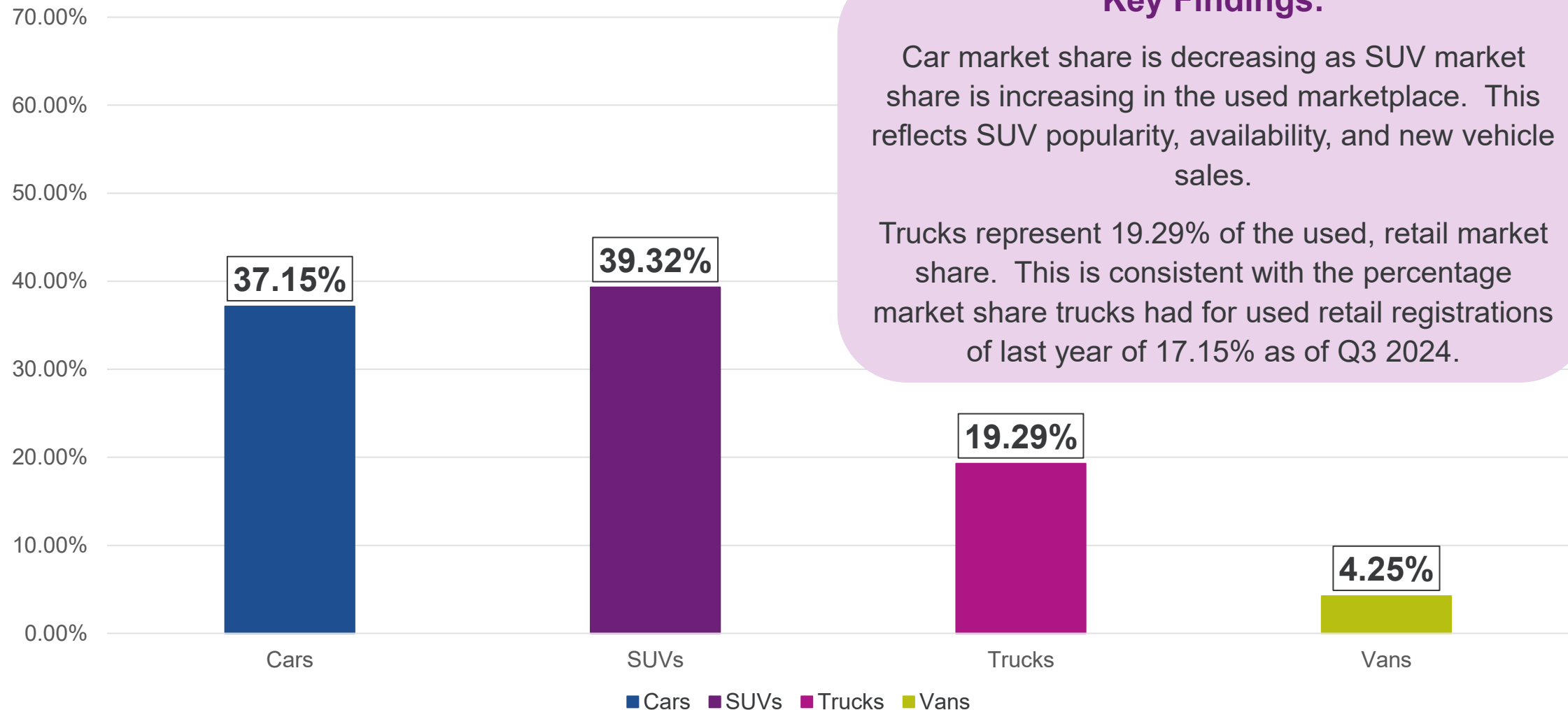
truck

in their 'garage'.

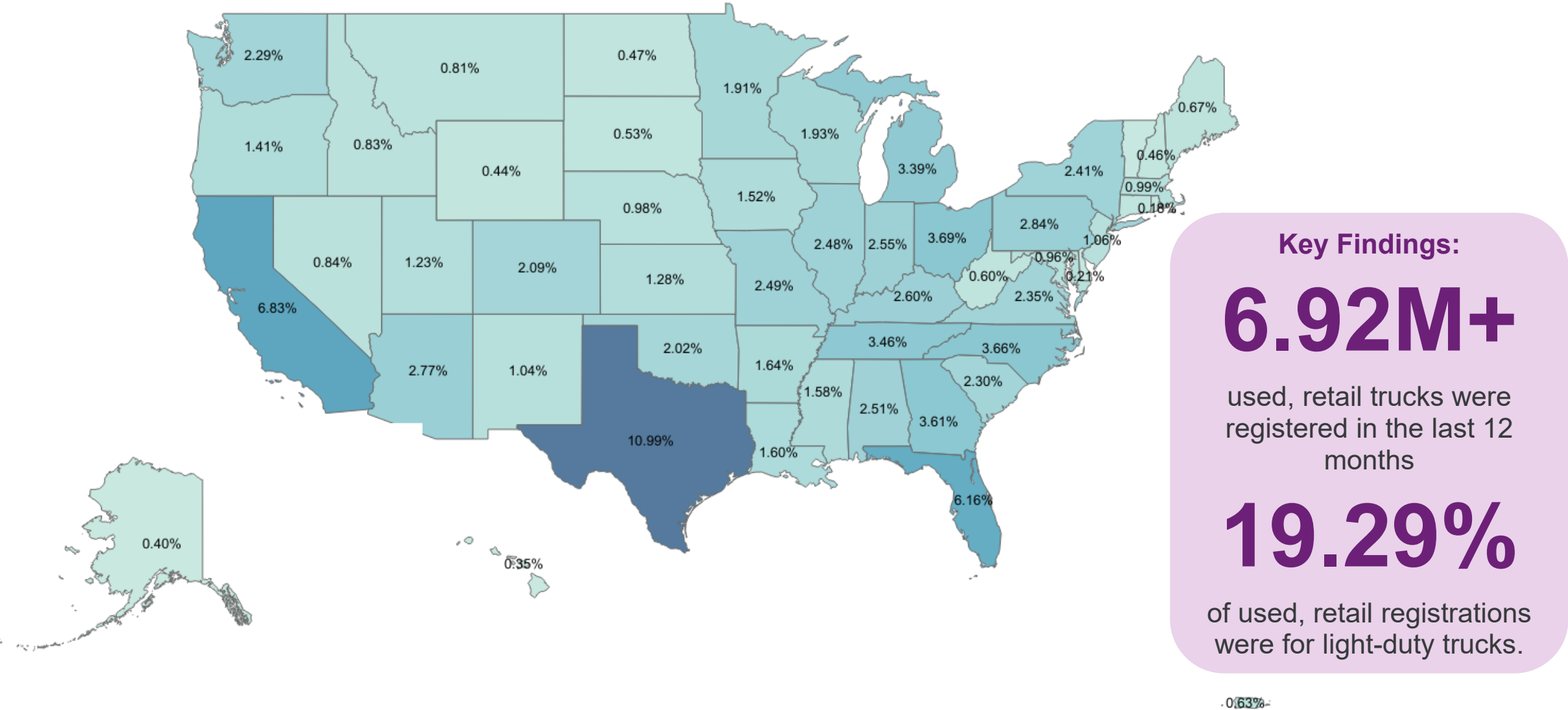


R12M Used, Retail Registrations Market Share %

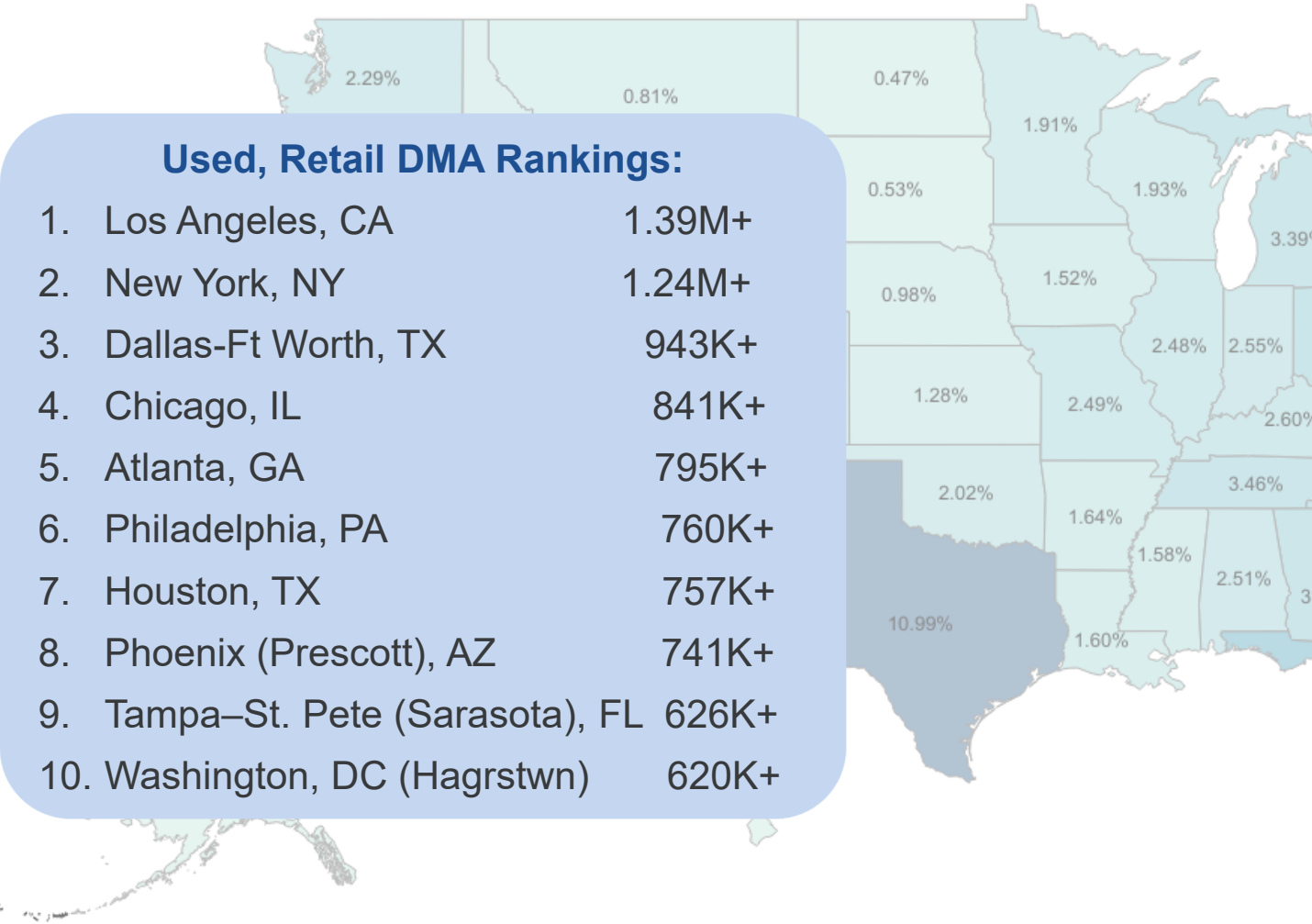
By Vehicle Segment



R12 U.S. Used, Retail Light-Duty Trucks Registration % by State



R12M Top U.S. DMAs for Used, Retail Light Duty Truck Registrations



Used, Retail, Truck DMA Rankings:

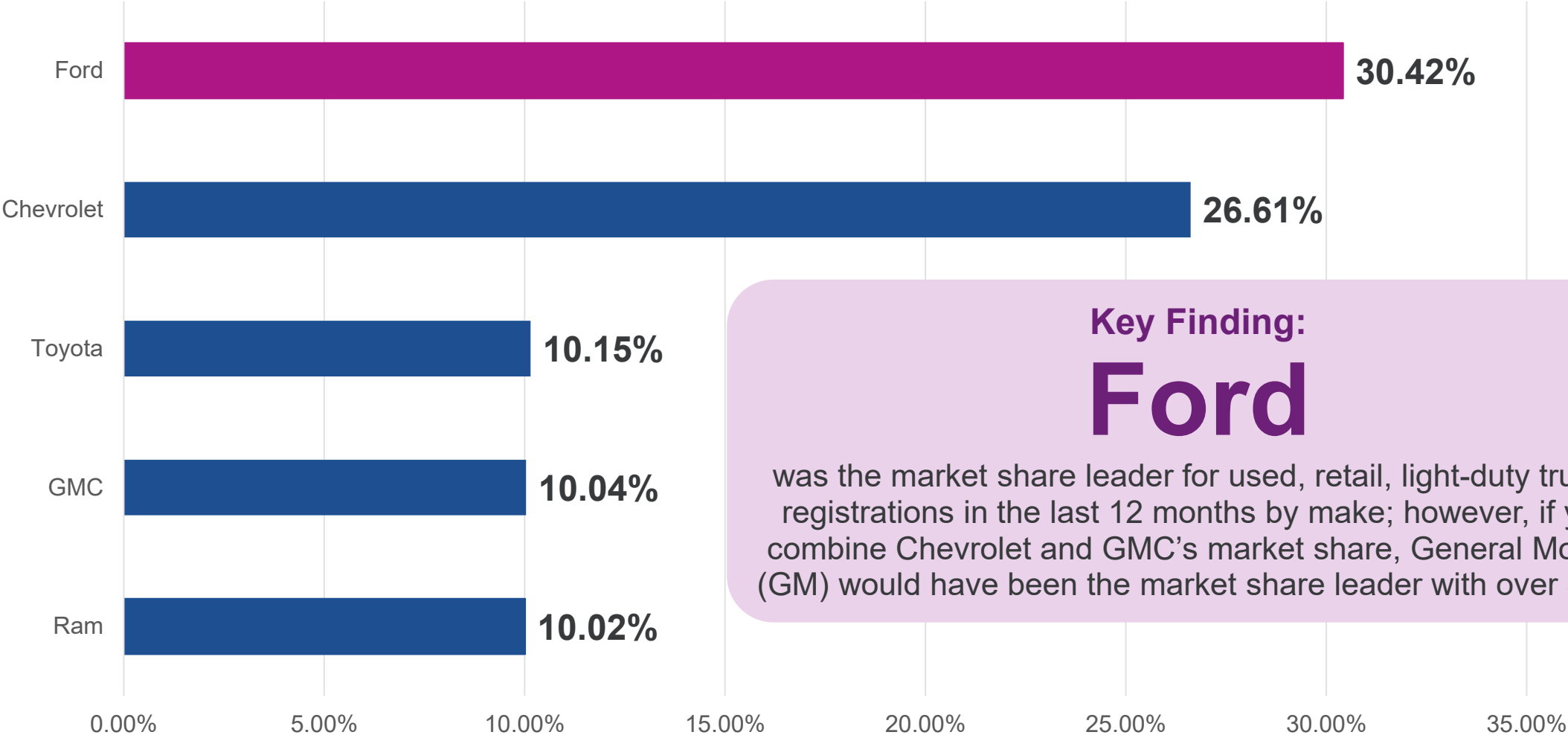
1. Dallas-Ft Worth, TX	194K+	↑
2. Los Angeles, CA	181K+	↓
3. Houston, TX	160K+	↑
4. Phoenix (Prescott), AZ	146K+	↑
5. Atlanta, GA	139K+	▬
6. Denver, CO	111K+	↑
7. Tampa–St. Pete (Sarasota), FL	108K+	↑
8. Nashville, TN	105K+	↑
9. Minneapolis-St. Paul, MN	102K+	↑
10. New York, NY	96K+	↓

↑ = the DMA ranked **higher** for **trucks** than the overall used, retail DMA ranking

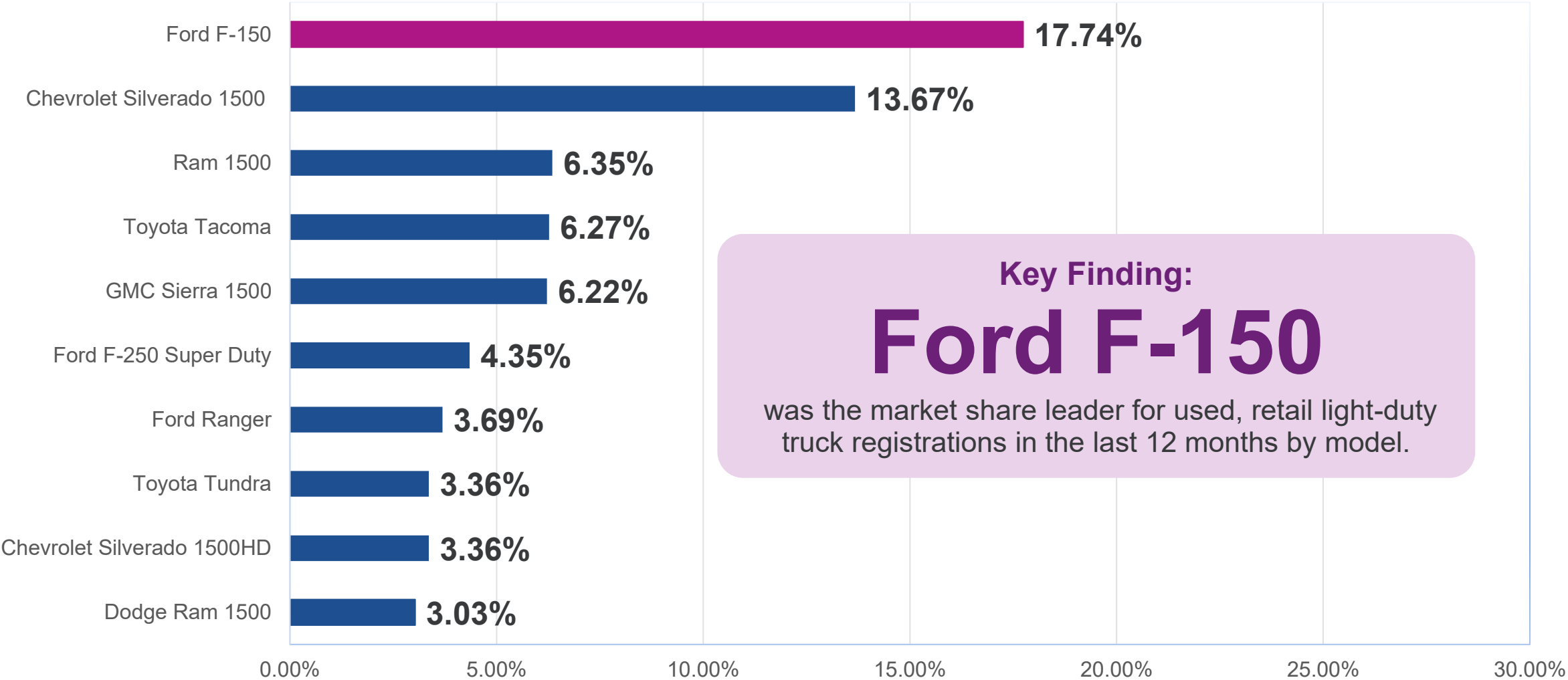
↓ = the DMA ranked **lower** for **trucks** than the overall used, retail DMA ranking

R12 Top 5 Used, Retail Truck Registration Market Share %

Light duty trucks by vehicle make



R12M Top 10 Used, Retail Light-Duty Truck Registration Market Share % By Model



Q3 Summary Insights

What are they driving?



Light-duty trucks represented **17.15%** of **new**, retail registrations in the last 12 months, as of Q3 2025.

Light-duty trucks represented **19.29%** of **used**, retail registrations in the last 12 months, as of Q3 2025.



Ford was the market share leader for new, retail, light-duty truck registrations by make with **46.89%** as of Q3 2025.

This was driven by having 3 of the top 10 models: the Ford F-150, Maverick and F-250 Super Duty.



Ford was the market share leader for used, retail, light-duty truck registrations by make with **30.42%** as of Q3 2025.

Chevrolet was a fast-follower for 2nd with **26.61%** of the used, retail light-duty truck market share as of Q3 2025.

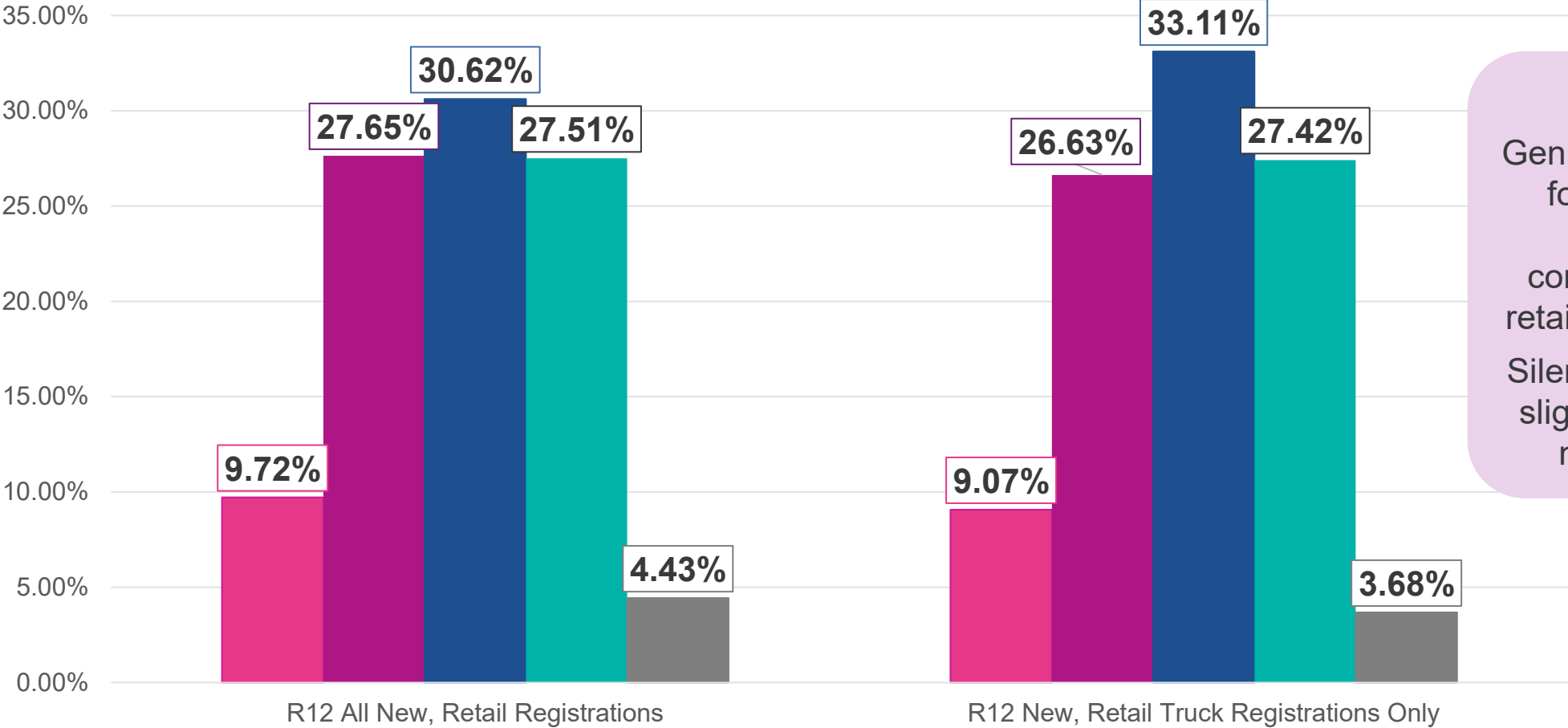
Q3 2025

Who are these buyers?

- Demographic information
- Generational insights
- Lifestyle segmentation



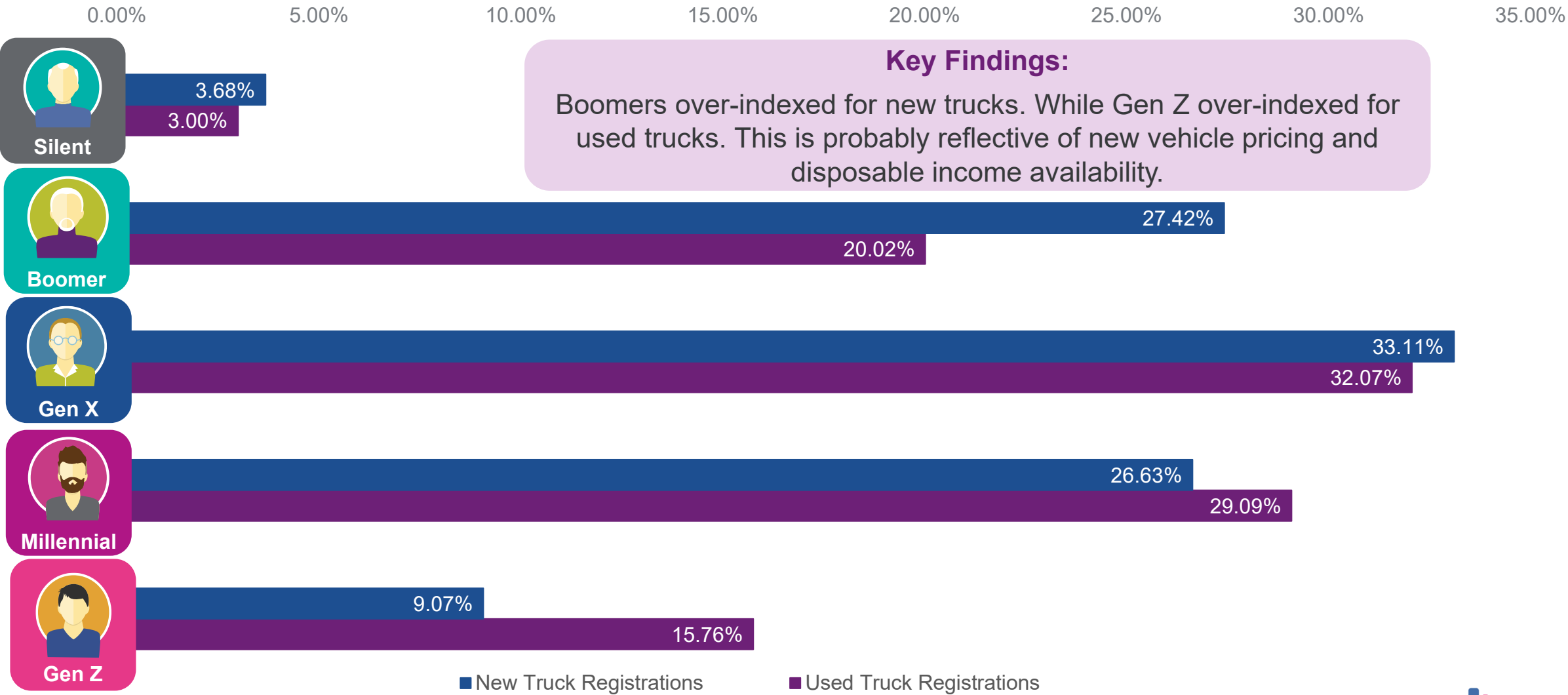
R12M New, Retail Light-Duty Truck Registration % by Generation



Key Findings:
Gen X buyers over-index for new, retail truck registrations as compared to the new, retail market as a whole. Silent generation buyers slightly under-index for new, retail trucks.

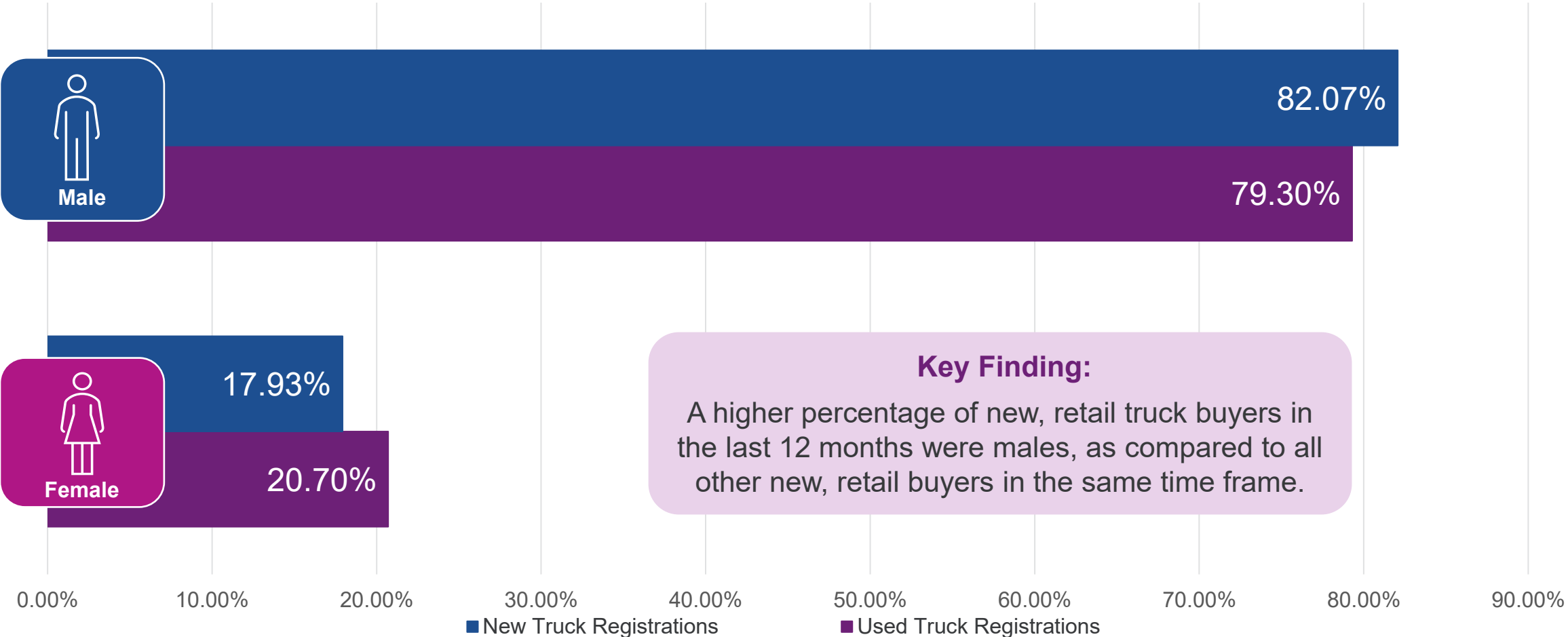
R12M Retail Registration Light-Duty Truck Market Share %

By Generation and Sold As Type



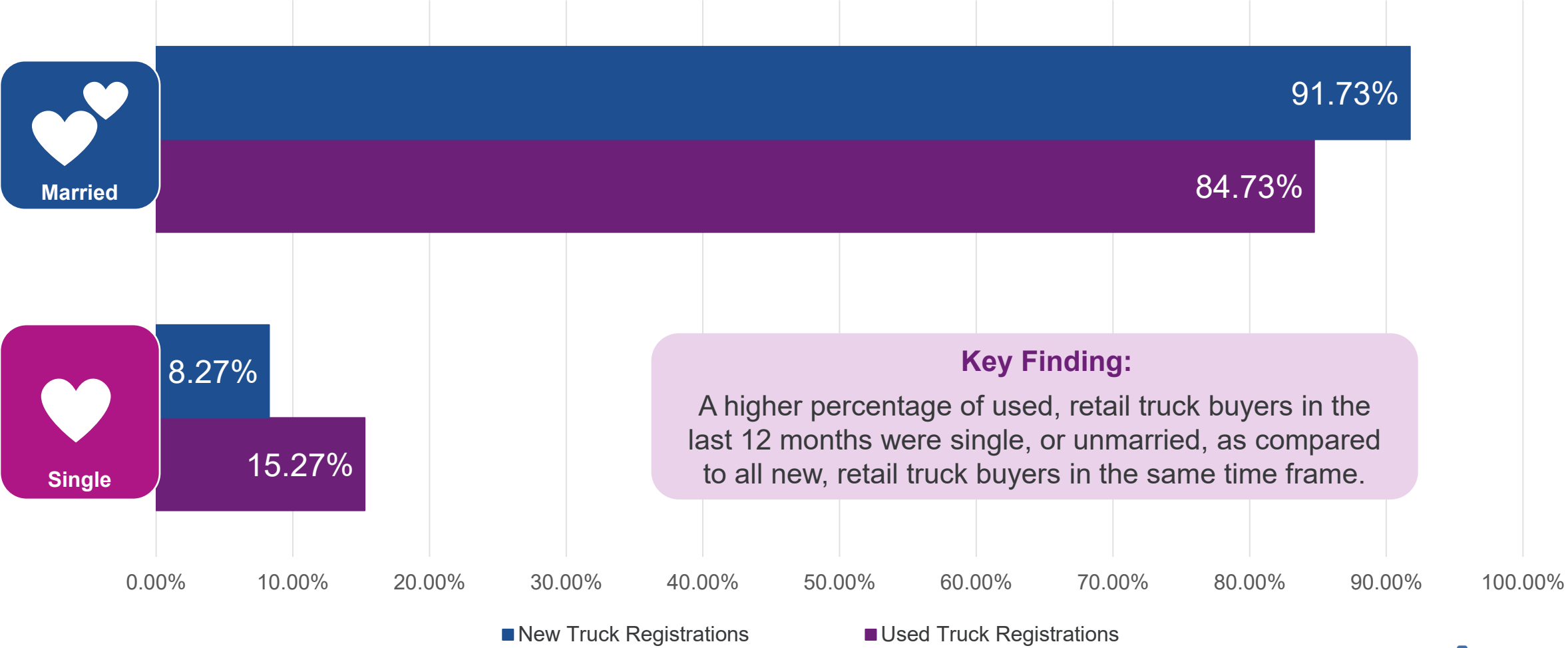
R12M Retail Registration Light-Duty Truck Market Share %

By Gender and Sold As Type



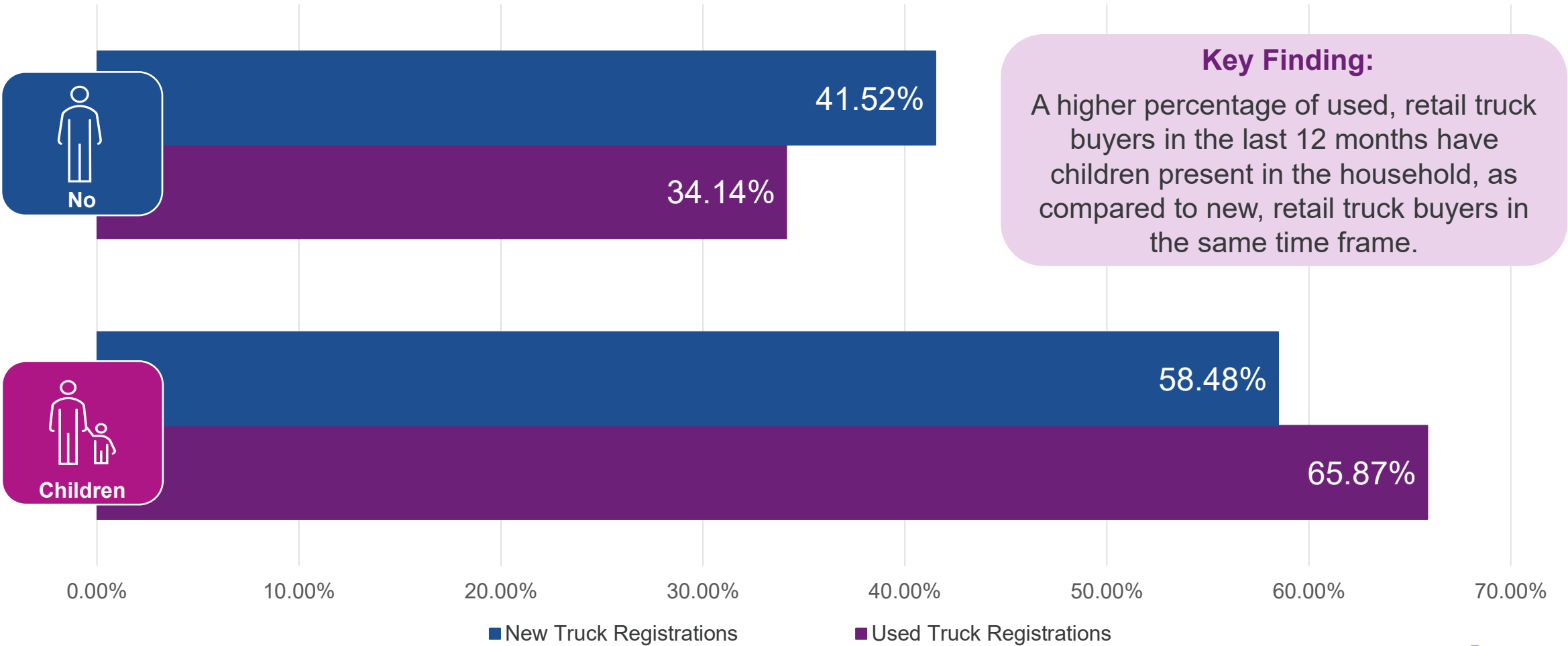
R12M Retail Registration Light-Duty Truck Market Share %

By Marital Status and Sold As Type



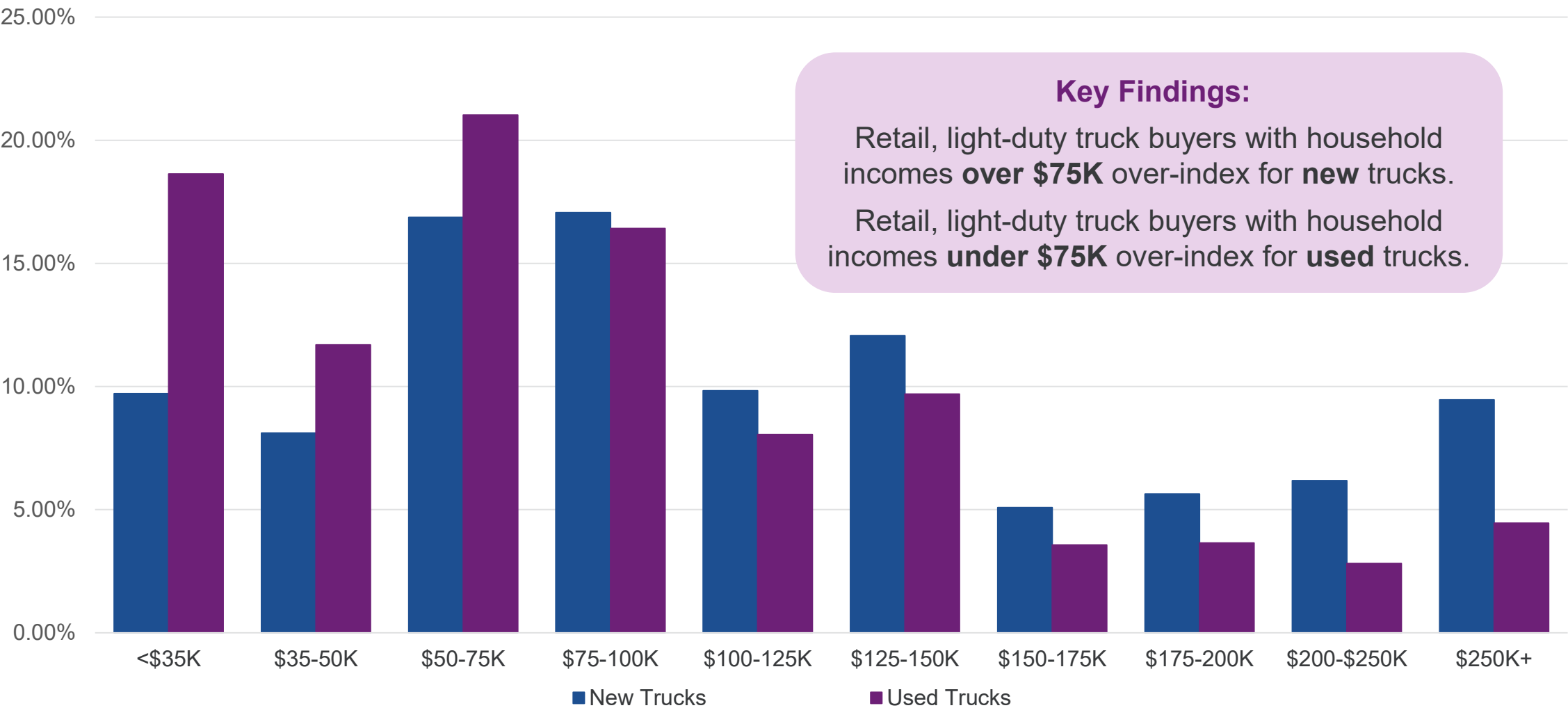
R12M Retail Light-Duty Truck Registration Market Share %

By Presence of Children and Sold As Type



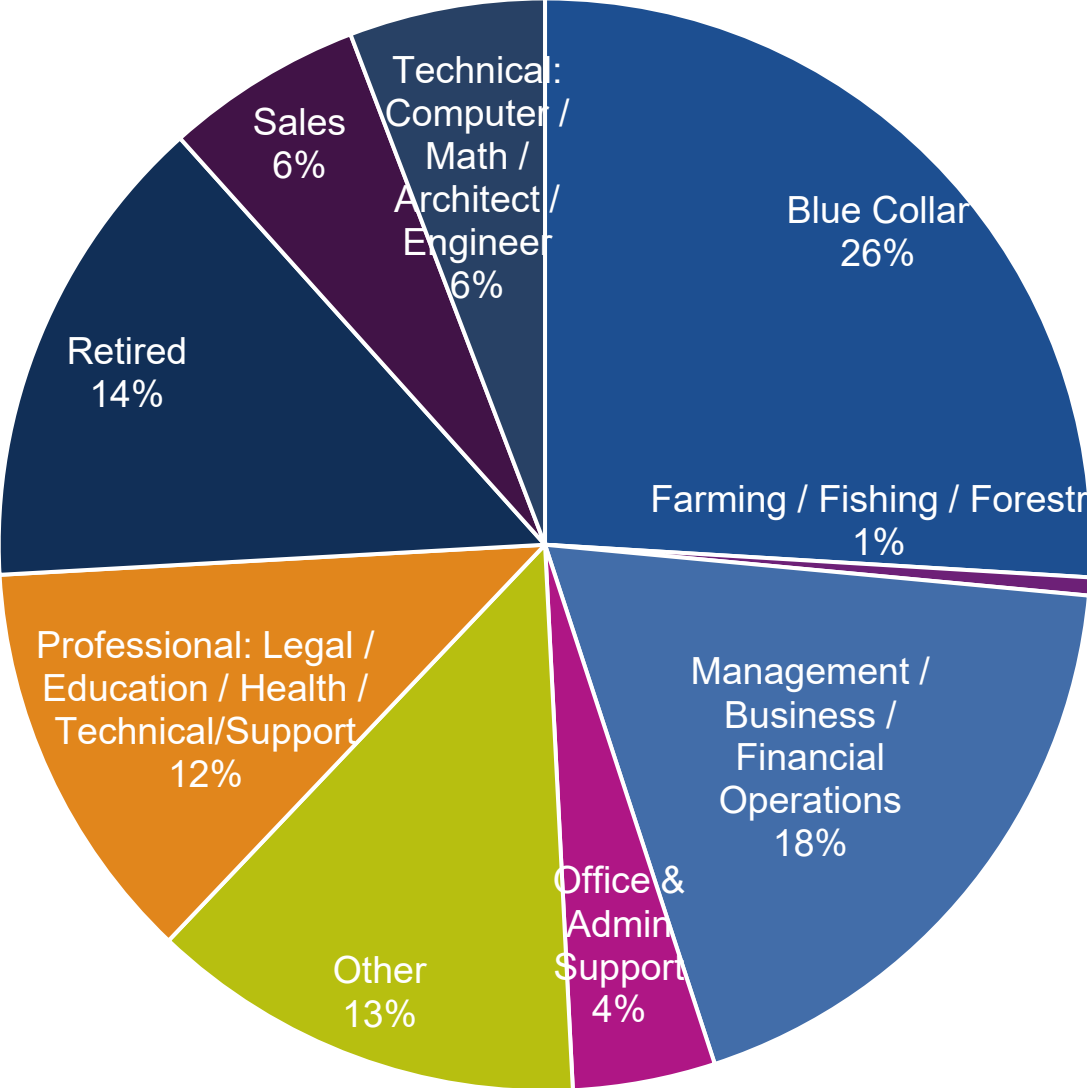
R12M Retail Light-Duty Truck Registration Market Share %

By Household Income and Sold As Type



R12M New Retail Truck Registration Market Share %

By Buyer Occupation

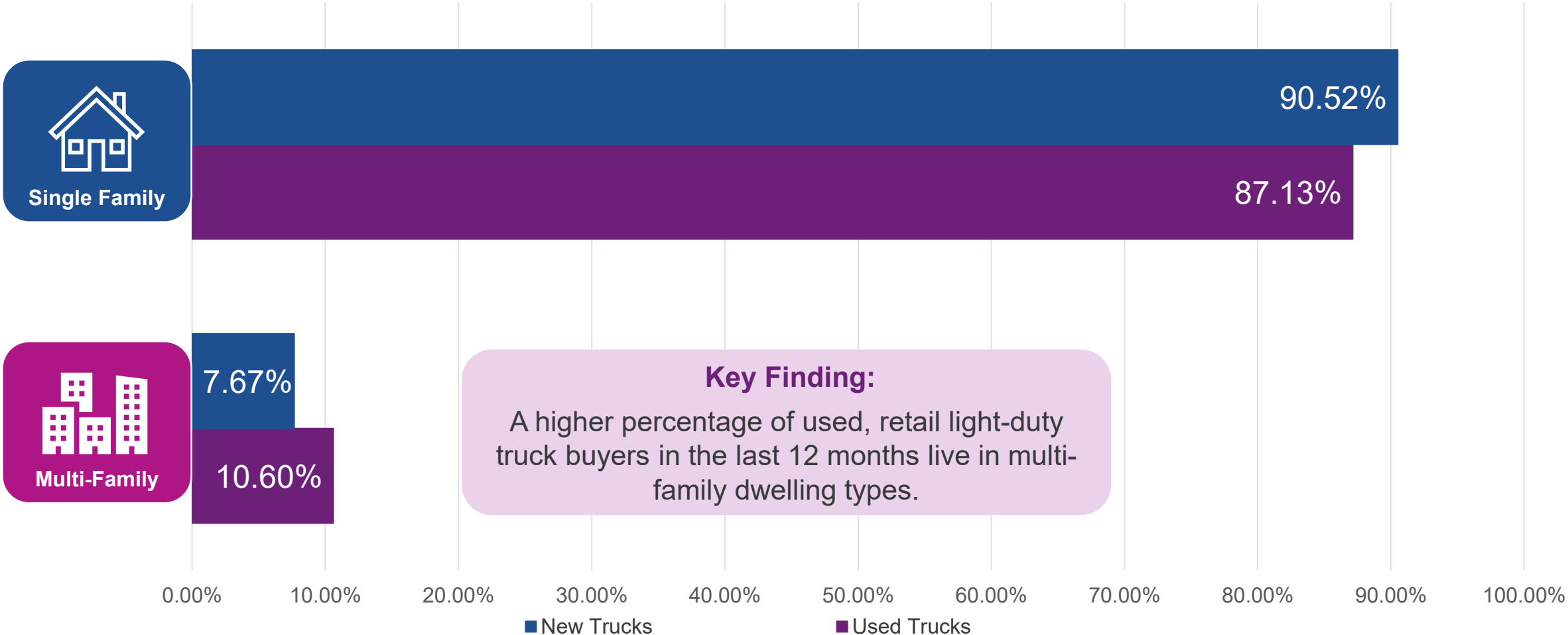


- Blue Collar
- Farming / Fishing / Forestry
- Management / Business / Financial Operations
- Office & Admin Support
- Other
- Professional: Legal / Education / Health / Technical/Support
- Retired
- Sales
- Technical: Computer / Math / Architect / Engineer

Key Findings:
Blue Collar was the highest occupation market share for new, retail light-duty truck buyers in the last 12 months.

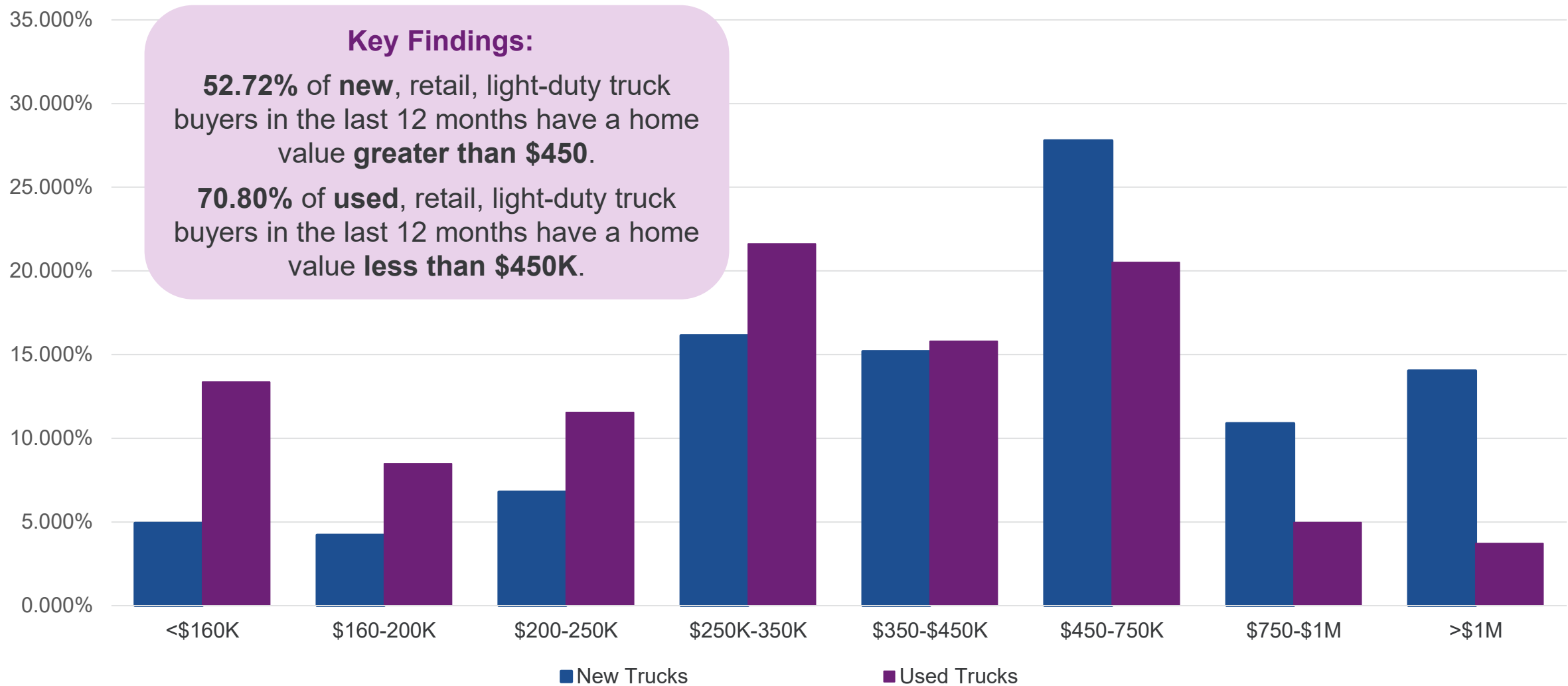
R12M Retail Light-Duty Truck Registration Market Share %

By Dwelling Type and Sold As Type



R12M Retail Light-Duty Truck Registration Market Share %

By Home Value and Sold As Type



Q3 Demographic Summary Insights



Consumer demographics vary across new and used truck buyers



Targeting specific consumers for your marketing campaigns is critical for success



Lifestyle segmentation can help you create precision marketing campaigns



Q3 2025 Meaningful Customer Segmentation is Critical

We deliver household-based lifestyle segmentation through Mosaic® USA. It brings 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

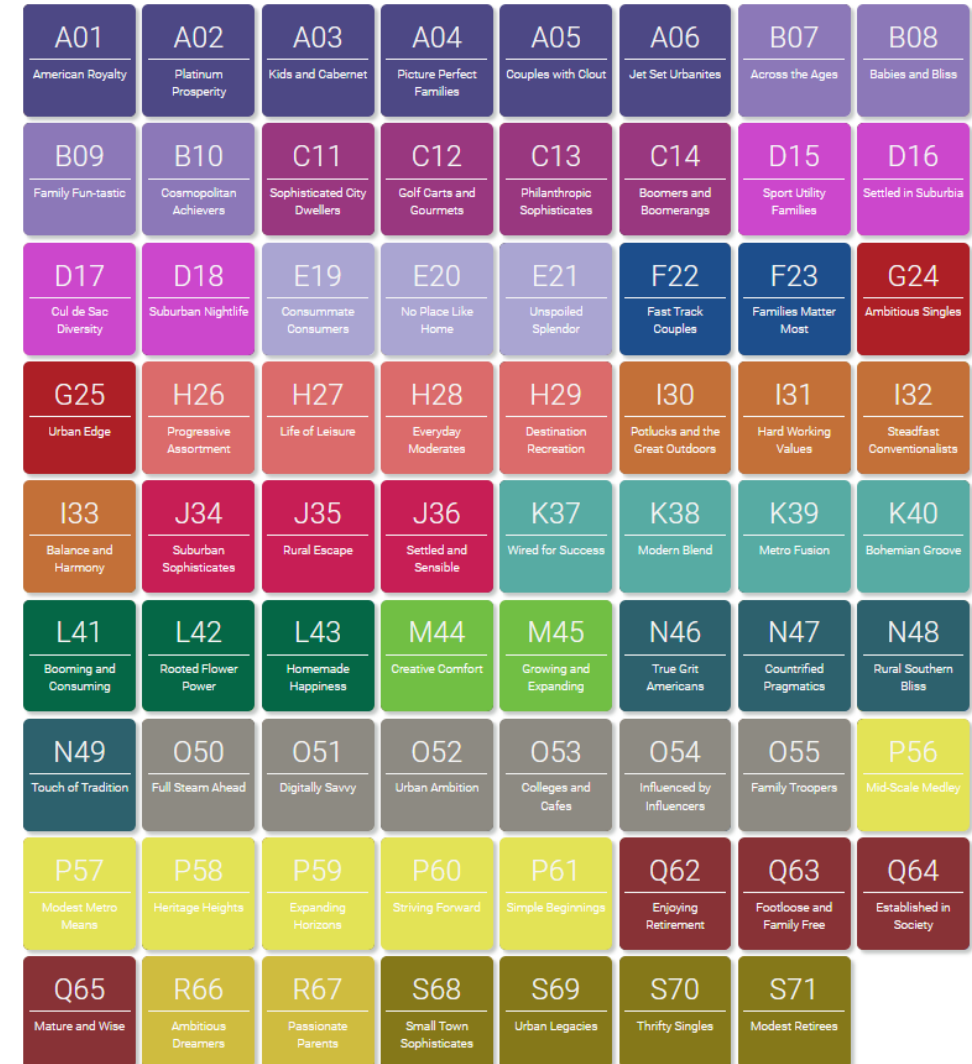
Experian Mosaic divides the marketable U.S. population into **19** Groups and **71** more detailed Types.

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 Light-Duty Truck Buyers

Top 5 Mosaic Lifestyle Segmentation Types

C13

Philanthropic Sophisticates

I30

Potlucks and the Great Outdoors

E21

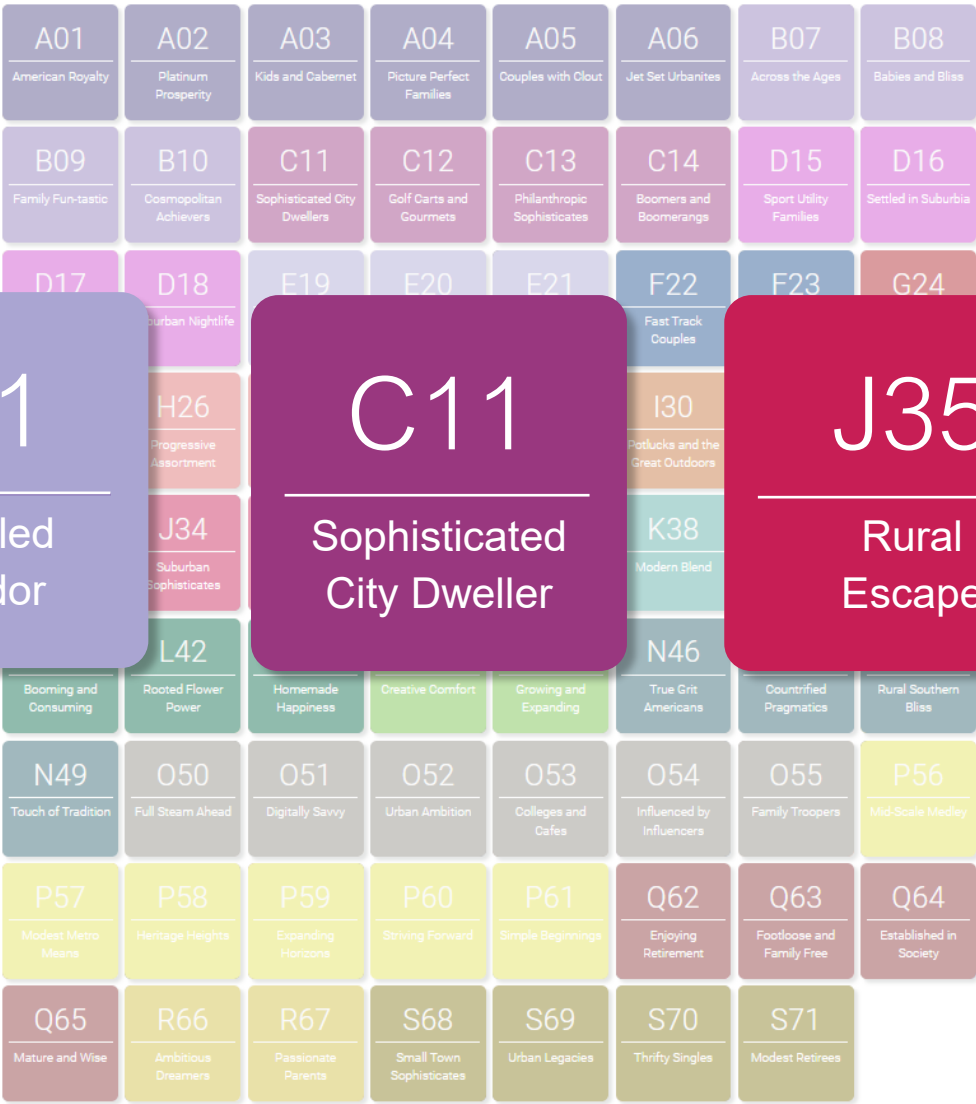
Unspoiled Splendor

C11

Sophisticated City Dweller

J35

Rural Escape



Top 3 Lifestyle Segments for New, Retail, Light-Duty, Truck Buyers



C13:
Philanthropic
Sophisticates



I30: Potlucks
and the Great
Outdoors



E21:
Unspoiled
Splendor

U.S.
Population

11.3M

6.1M

6.1M

% Households

4.09%

1.95%

1.95%

% Individuals

4.92%

2.72%

2.63%

Overview

Mature, upscale
couples in suburban
homes

Comfortably
established, middle-
income couples with
children living in
suburbia

Comfortably
established baby
boomer couples in
town and country
communities

Top 3 Lifestyle Segments for New Retail EV Buyers



C13:
Philanthropic Sophisticates



I30: Potlucks and the Great Outdoors



E21:
Unspoiled Splendor

General Insights

- Retiring in comfort
- Experienced travelers
- Art connoisseurs
- Philanthropic

- Country living
- Outdoor activities
- Blue-collar jobs
- Non-environmental

- Price-conscious
- Politically conservative
- Do-it-yourselfers
- Racing fanatics

Technology Adoption



Apprentices



Apprentices



Apprentices

Top 3 Lifestyle Segments for New Retail EV Buyers



C13:
Philanthropic
Sophisticates



I30: Potlucks
and the Great
Outdoors



E21:
Unspoiled
Splendor







TrueTouch Top Buying Style

Brand
loyalists

Deal
seekers

Trendsetters

Top 3 Channel Preferences

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



R12M Used, Retail Light-Duty Truck Buyers

Top 5 Mosaic Lifestyle Segmentation Types



Key Finding:

The used truck buyer looks considerably different than the new truck buyer. Marketing campaigns should take these differences, including channel and message preferences, into consideration.

Q3 2025 Case Study



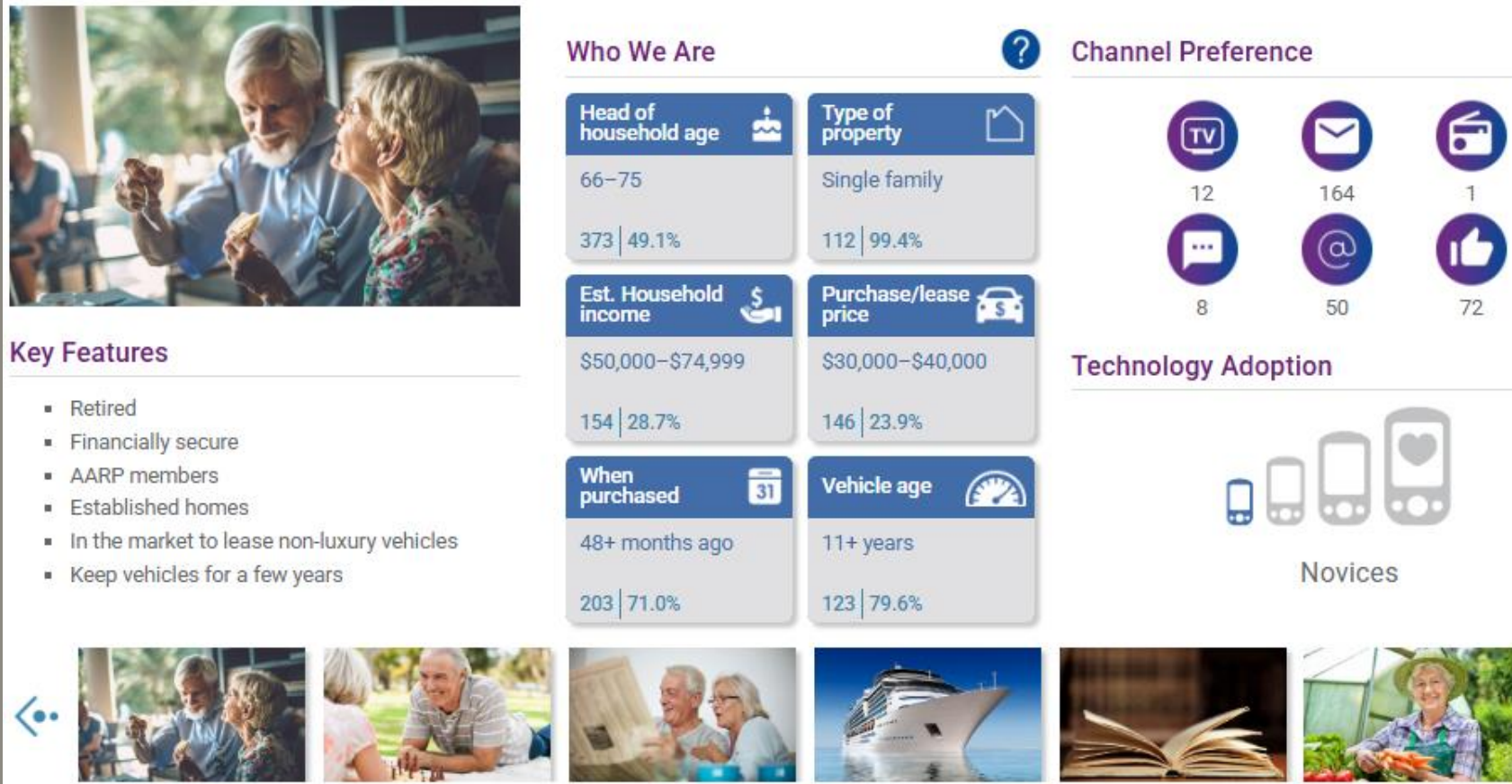
- New, Retail Light-Duty Truck:
Chevrolet Colorado
- #1 New, Retail Buyer Mosaic Lifestyle Segment:
J34: Suburban Sophisticates



#1 Mosaic Type for New, Retail Chevrolet Colorado Buyers

J: Autumn Years. J34: Suburban Sophisticates

Established sophisticates living comfortable suburban lifestyles



How to market to them:

To ensure your brand messages grab the attention of Suburban Sophisticates consumers, resonate with their core American ideals of honor, respect, loyalty and pride.

For your call to action, leverage loyalty programs and put your best foot forward when it comes to fostering this customer relationship. Outstanding customer service is key to maintaining this loyal consumer market.

Q3 Summary Insights

New, Retail EV Buyers



C13: Philanthropic Sophisticates

1. #1 buyers for new trucks (#14 for used)
2. Mature, upscale couples in suburban homes
3. Brand loyalists
4. Email #1



I30: Potlucks and the Great Outdoors

1. #2 buyers for new trucks (#1 for used)
2. Comfortably established, middle-income couples with children living in suburbia
3. Deal seekers
4. Social #1



E21: Unspoiled Splendor

1. #3 buyers for new trucks (#7 for used)
2. Comfortably established baby boomer couples in town and country communities
3. Trendsetters
4. Social #1

Q3 Vehicle Summary Insights



What are they driving

- Light-duty trucks represented 17.15% of new, retail registrations.
- Non-Luxury trucks represented 98.22% of the new, retail, truck market.
- The Ford F-150 was the top model for new and used light-duty truck sales in the last 12 months with 13.22% of new truck market share, and 17.74% of used market share.



Who are they

- There are differences between light-duty new and used truck buyers by generation. Gen X buyers over-index for used trucks and Baby Boomers over-index for new trucks.
- A higher percentage of used, retail truck buyers in the last 12 months have children present in the household, as compared to new, retail truck buyers in the same time frame.



How to Market to them

- Email is the preferred channel for the top lifestyle segment for new, retail light duty truck buyers; however, social is the top channel for the 2nd and 3rd lifestyle segments.
- It's important to customize your audience, message and channel to your market and buyer for precision marketing campaigns.

Save the date



SAVE THE DATE:

March 2026



AUTOMOTIVE CONSUMER
TRENDS REPORT:

Q4 2025

Cars



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.





Automotive Consumer Trends

Stay informed



STAY INFORMED:

**Experian Automotive
Market Insights.**



EXPERIAN AUTOMOTIVE REPORT TRENDS:



Scan this
QR Code

To view all of our
trend reports!

Or, click buttons below to access trend reports.



**Automotive Consumer
Trends Report**



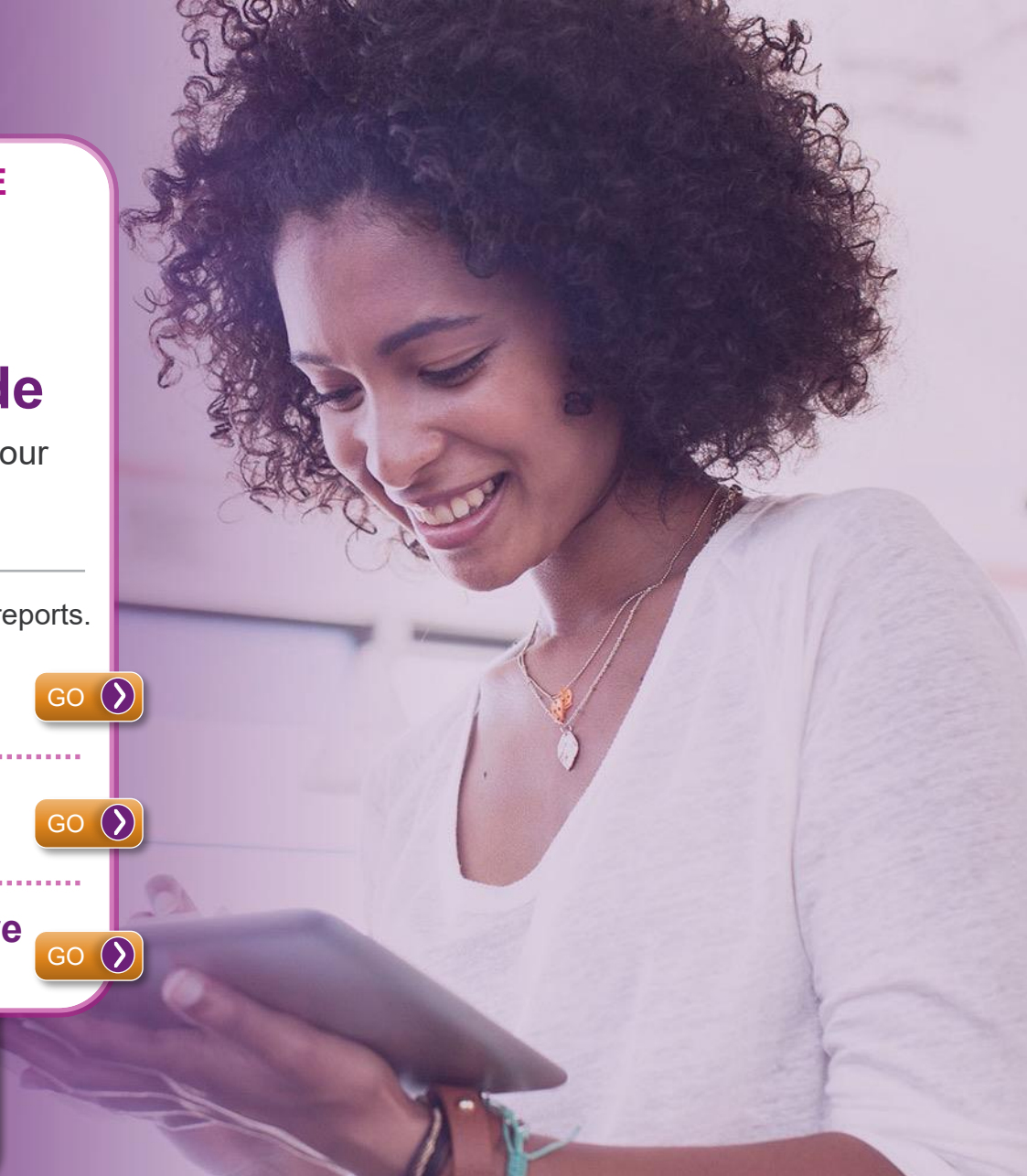
**Automotive Market
Trends Report**



**State of the Automotive
Finance Market Report**



FREE





Connect & Follow Us



CONNECT WITH US ON

LinkedIn:

**Experian
Automotive**



FOLLOW US ON

X:

**#EXPAuto@
Experian_Auto**



JOIN THE CONVERSATION

BlueSky:

**Experian
Automotive**

@experianautomotive.bsky.social



A woman with long dark hair, wearing an orange long-sleeved shirt, is driving a car. She is smiling broadly and has her right hand raised in a celebratory gesture. The car's interior is visible, including the steering wheel and dashboard. The background shows a blurred green landscape.

Experian Automotive

Thank You!

