



EXPERIAN AUTOMOTIVE

Q1 2025

Automotive Consumer Trends & Analysis

Kirsten Von Busch
Director, Product Marketing
June 18, 2025

Q1 Report overview



SUVs* – Q1 2025

What sport utility vehicles (SUVs) are on the road and who is buying them?

Vehicles in Operation overview and Consumer Analysis by SUV vehicle segment, for U.S. light duty vehicles through March 31, 2025.

*For this report, SUV is inclusive of SUV and CUV vehicles. As the differentiation between the SUV and CUV segments has continued to blur, we have combined all these vehicles into one category for the purposes of this analysis and discussion.

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

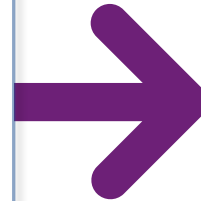


CONSUMER DATA



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+

Q1 2025 SUV Customers

- 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

Q1 2025 Total*

293.5
MILLION

Vehicles on the road

Q1 2025 VIO changes

Q1 2024 Total*

289.6
MILLION

Vehicles on the road



16.1
MILLION

NEW Vehicles
Registered



12.2
MILLION

Vehicles went
out of operation



39.3
MILLION

USED vehicles
changed owners

=

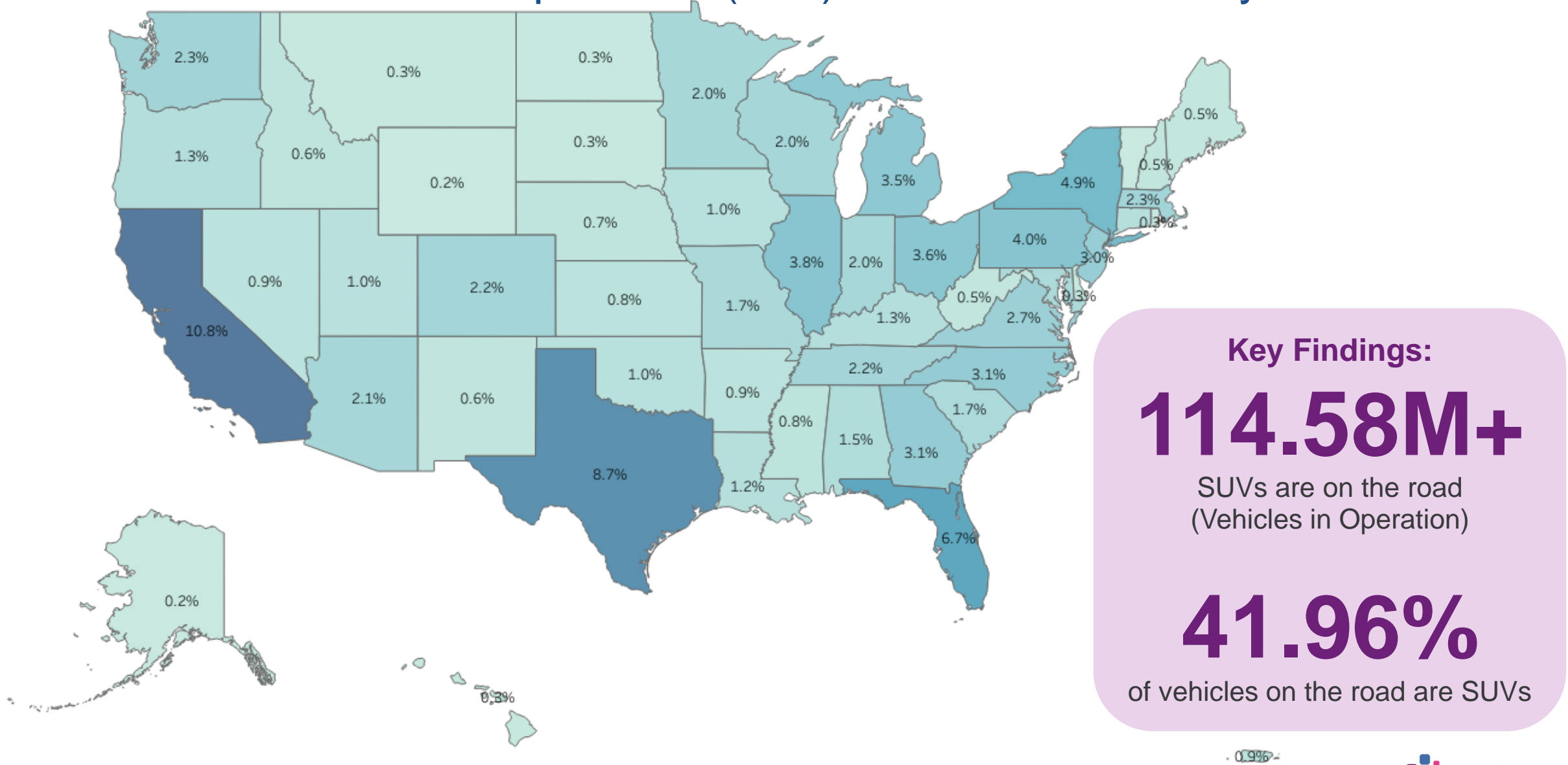


28.8%

Total VIO
changes¹

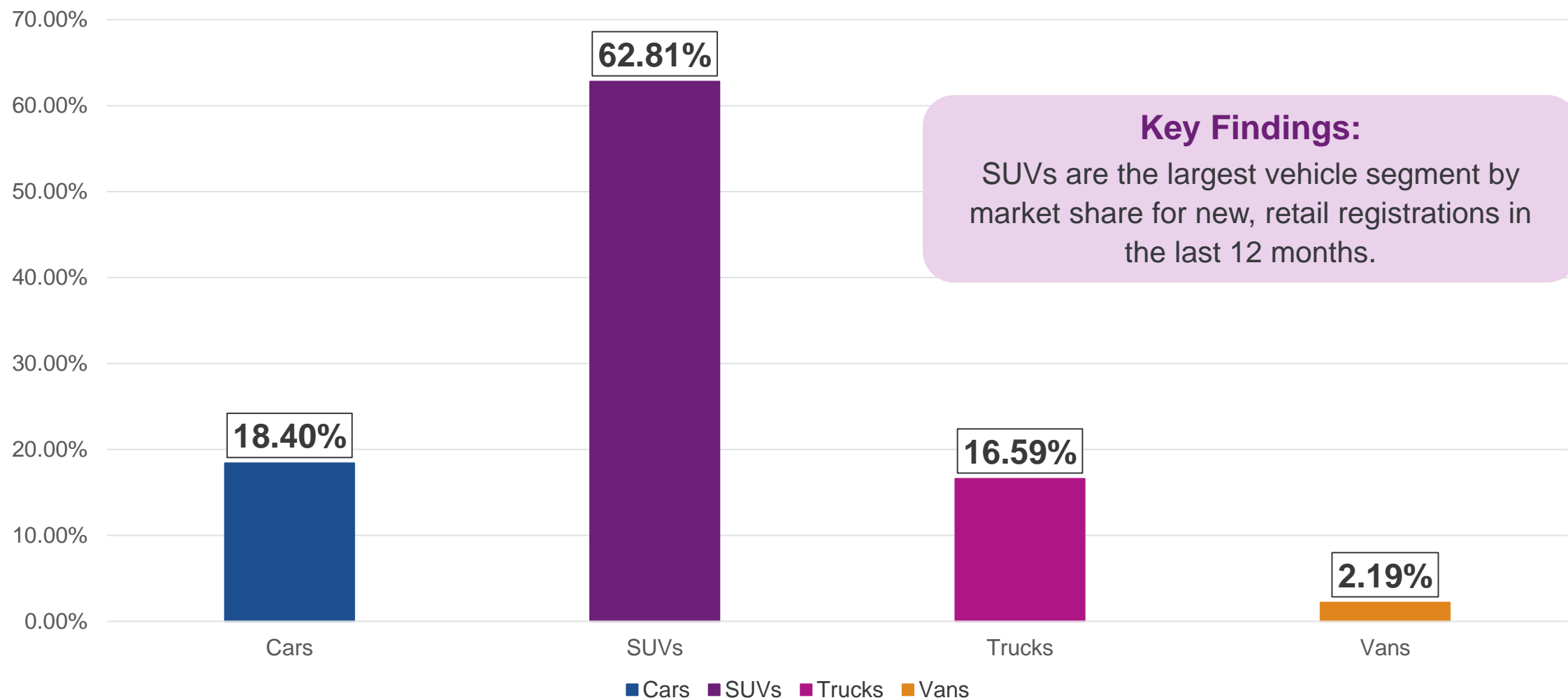
*U.S. Vehicles in Operation data as of Mar 31, 2024 and 2025, sourced from Experian Automotive, including U.S. and Puerto Rico (U.S. light duty vehicles only).
1 – includes estimated annual households that relocated with the same vehicle(s)

Q1 2025 U.S. SUVs in Operation (VIO) Market Share % by State

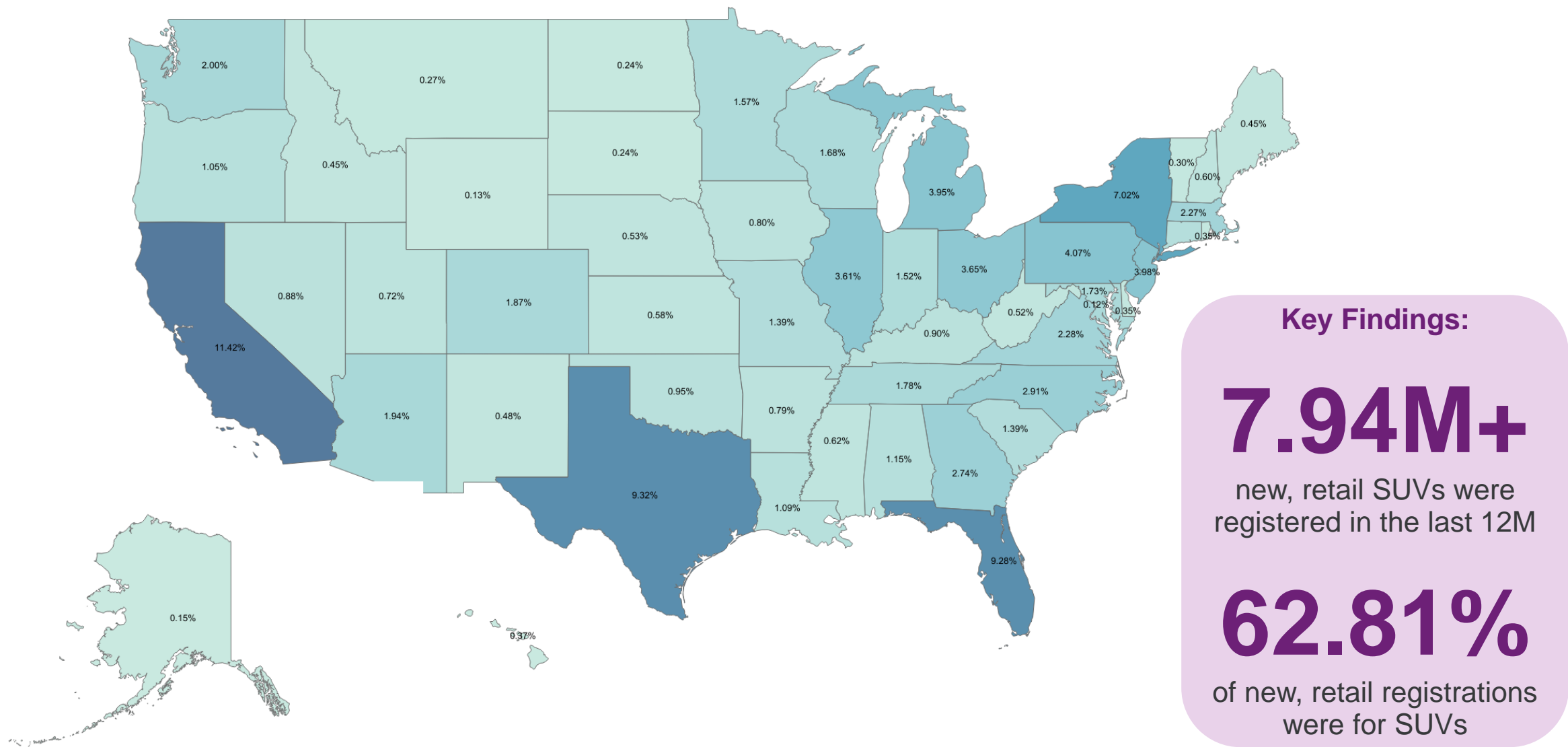


R12M New, Retail Registrations Market Share %

By Vehicle Segment

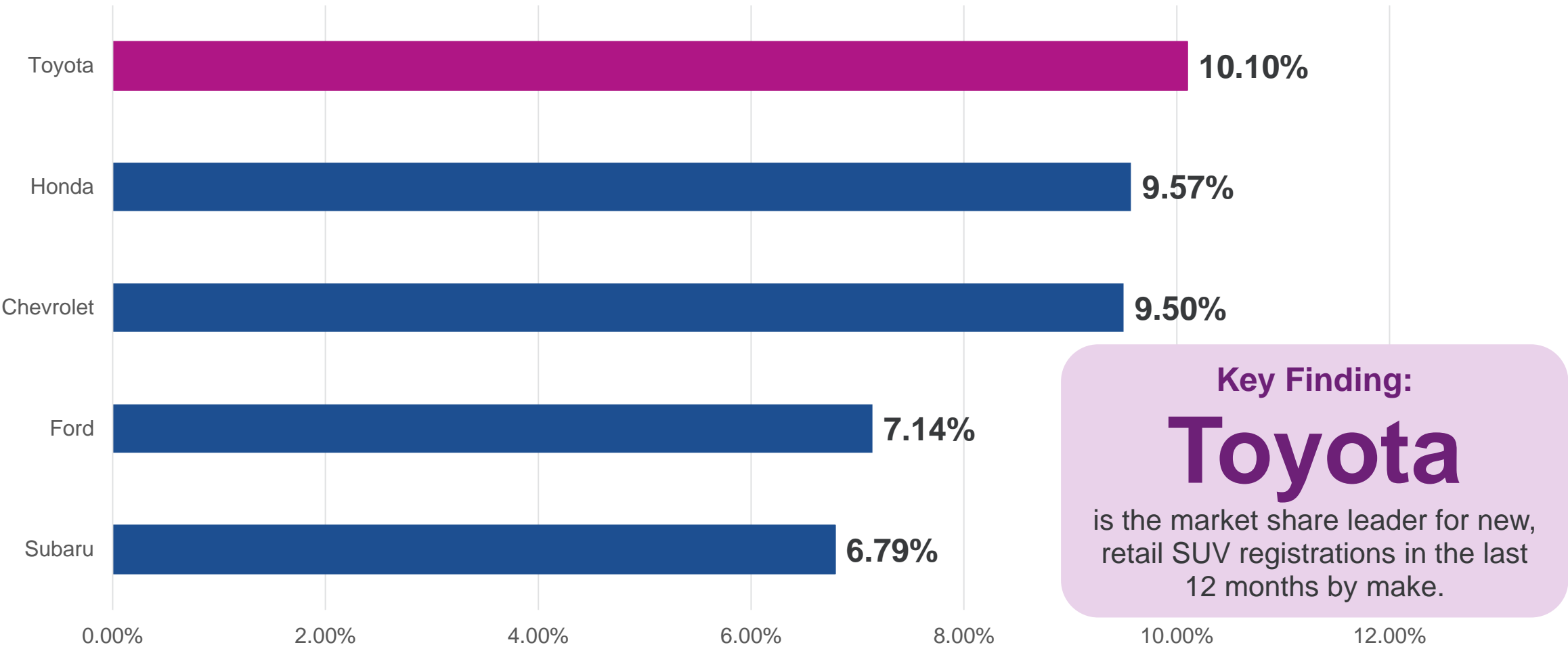


R12M U.S. New, Retail SUV Registration % by State



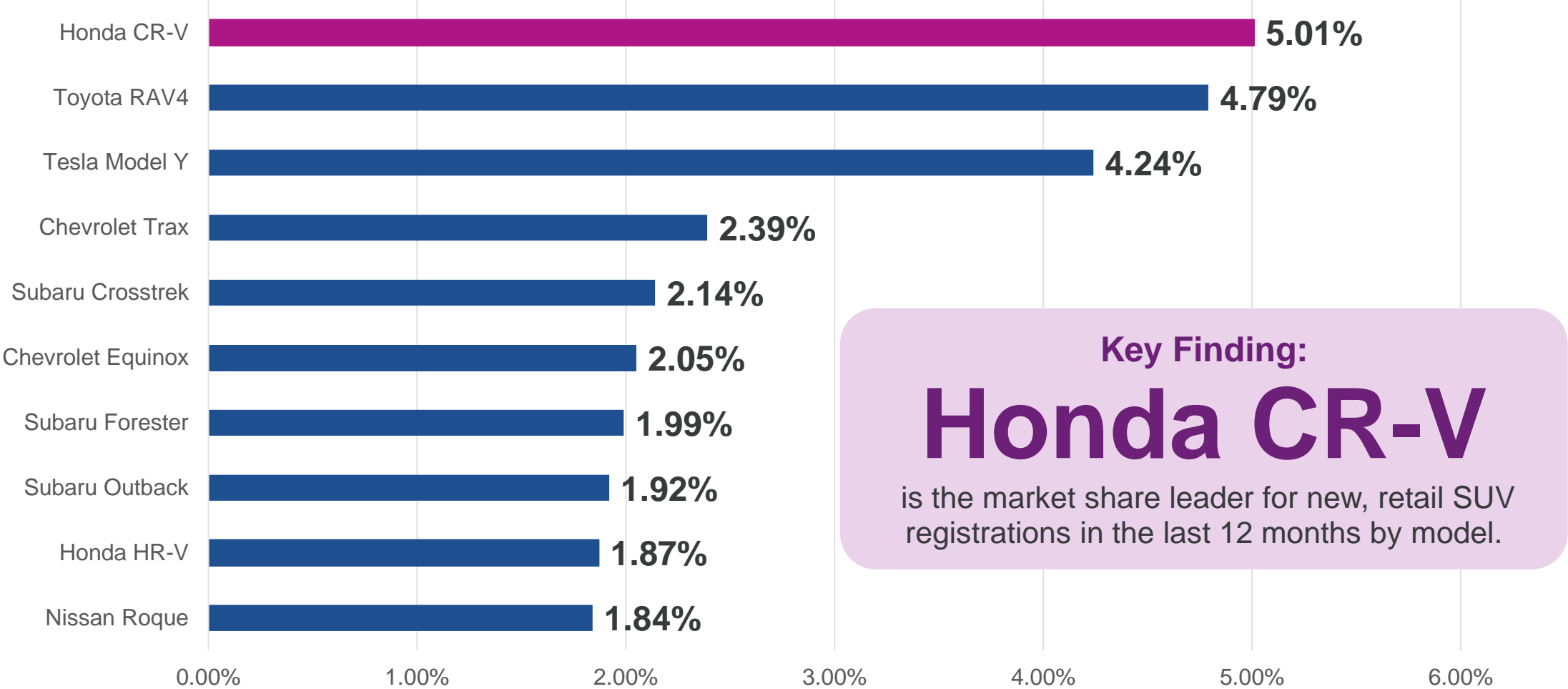
R12 Top 5 New, Retail SUV Registration Market Share %

By Vehicle Make



R12M Top 10 New, Retail SUV Registration Market Share %

By Vehicle Model



Top 4 SUV Market Share % Overview by Model

New, Retail Registrations for the last 12 months

SUVs account for

62.81%

of new, retail registrations in the last 12 Months

New Market Share – **3.15%**
New **SUV** Market Share – **5.01%**
New **Non-Luxury SUV** Market Share – **6.42%**



Honda CR-V

New Market Share – **3.01%**
New **SUV** Market Share – **4.79%**
New **Non-Luxury SUV** Market Share – **6.14%**



Chevrolet Trax



Market
Share



Toyota RAV4

New Market Share – **1.50%**
New **SUV** Market Share – **2.39%**
New **Non-Luxury SUV** Market Share – **3.07%**



Tesla Model Y

New Market Share – **2.66%**
New **SUV** Market Share – **4.24%**
New **Luxury SUV** Market Share – **19.27%**

What Model Did Each Vehicle Replace?

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

Honda CR-V

Top 4 Inflows Including Honda Models

Honda CR-V	41.83%
Honda Accord	7.98%
Honda Civic	4.84%
Honda Pilot	4.04%

Top 4 Inflows From Other Makes

Toyota RAV4	2.20%
Toyota Camry	1.58%
Subaru Forester	1.13%
Nissan Rogue	1.11%

Toyota RAV4

Top 4 Inflows Including Toyota Models

Toyota RAV4	33.26%
Toyota Camry	8.58%
Toyota Corolla	5.35%
Toyota Highlander	5.29%

Top 4 Inflows From Other Makes

Honda CR-V	2.97%
Nissan Rogue	1.34%
Ford Escape	1.27%
Subaru Forester	1.23%

Tesla Model Y

Top 4 Inflows Including Tesla Models

Tesla Model Y	17.64%
Tesla Model 3	17.22%
Honda CR-V	2.46%
Toyota Camry	2.40%

Top 4 Inflows From Other Makes

Honda CR-V	2.46%
Toyota Camry	2.40%
Toyota RAV4	2.30%
Honda Accord	2.26%

Chevrolet Trax

Top 4 Inflows Including Chevrolet Models

Chevrolet Trax	15.39%
Chevrolet Equinox	10.28%
Chevrolet TrailBlazer	5.77%
Chevrolet Malibu	4.74%

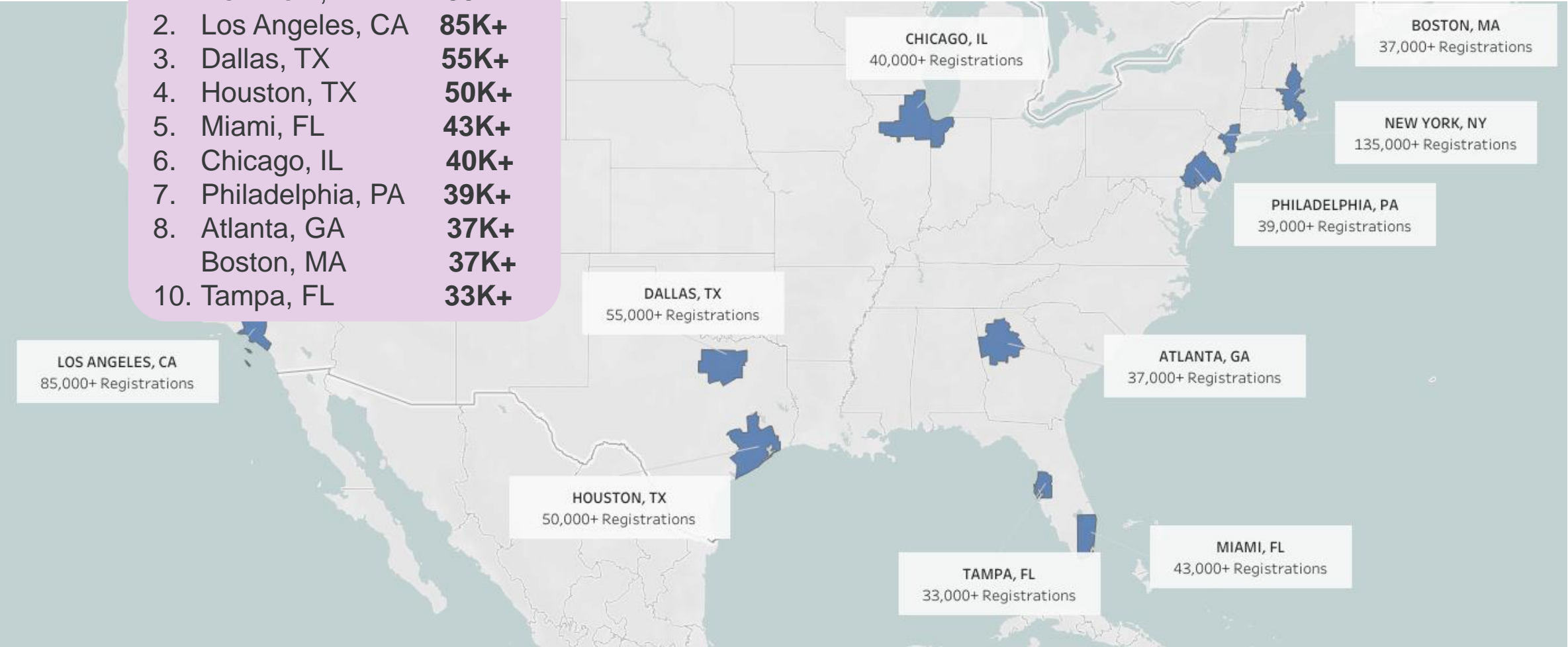
Top 4 Inflows From Other Makes

Ford Escape	1.39%
Buick Encore	1.32%
Buick Encore GX	1.22%
Hyundai Elantra	1.12%

R12M Top U.S. DMAs for New, Retail SUV Registrations

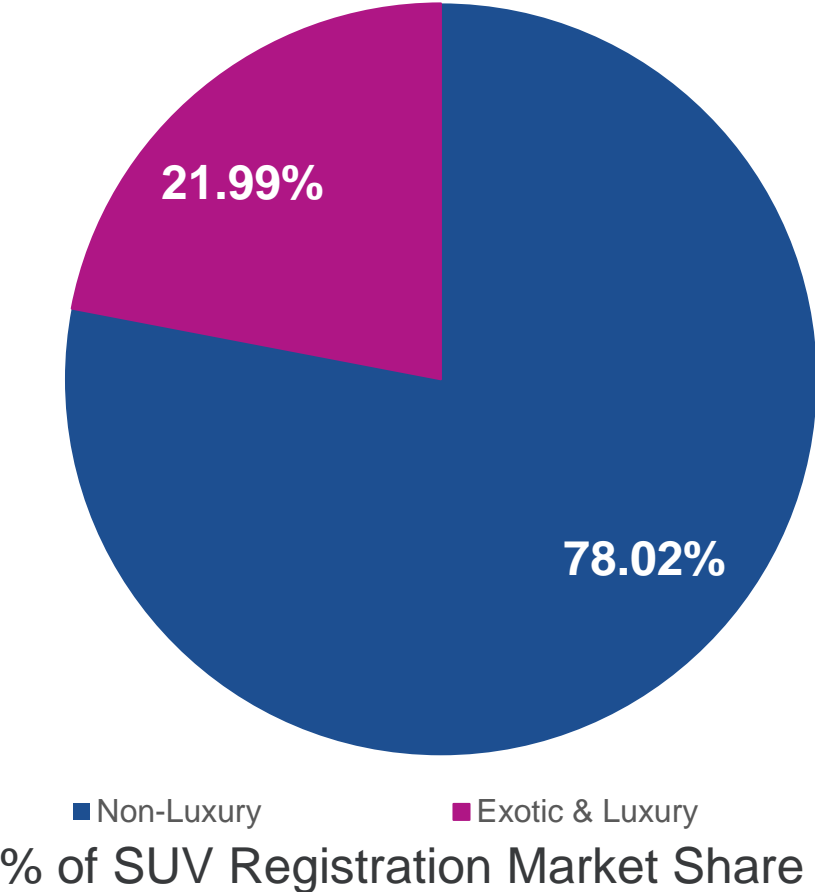
New DMA Ranking:

- 1. New York, NY 135K+
- 2. Los Angeles, CA 85K+
- 3. Dallas, TX 55K+
- 4. Houston, TX 50K+
- 5. Miami, FL 43K+
- 6. Chicago, IL 40K+
- 7. Philadelphia, PA 39K+
- 8. Atlanta, GA 37K+
- Boston, MA 37K+
- 10. Tampa, FL 33K+



R12M New, Retail SUV Registration Market Share %

By Vehicle Class: Non-Luxury, Luxury and Exotic Vehicles



Key Findings:

Non-Luxury SUVs account for

78.02%

of new, retail registrations in the last 12 Months

Luxury SUVs account for

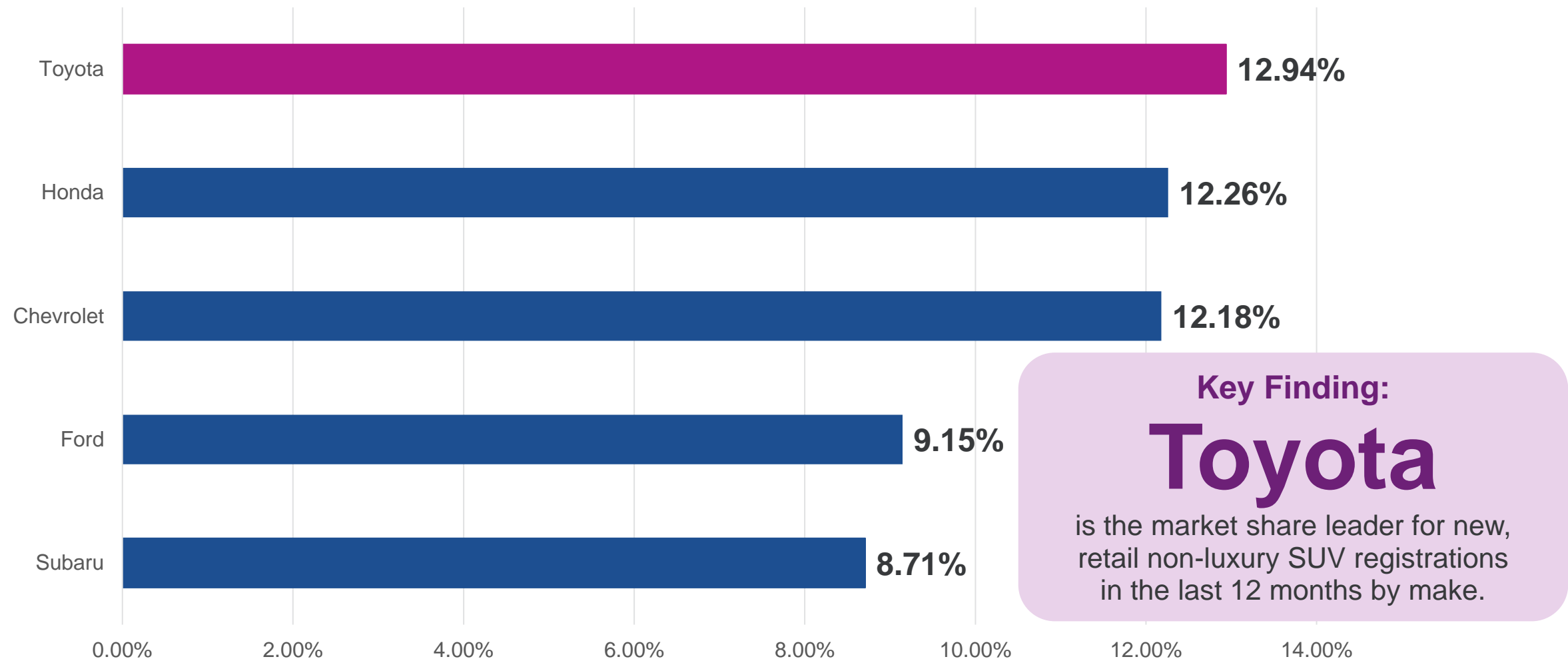
21.90%

Exotic SUVs account for

0.08%

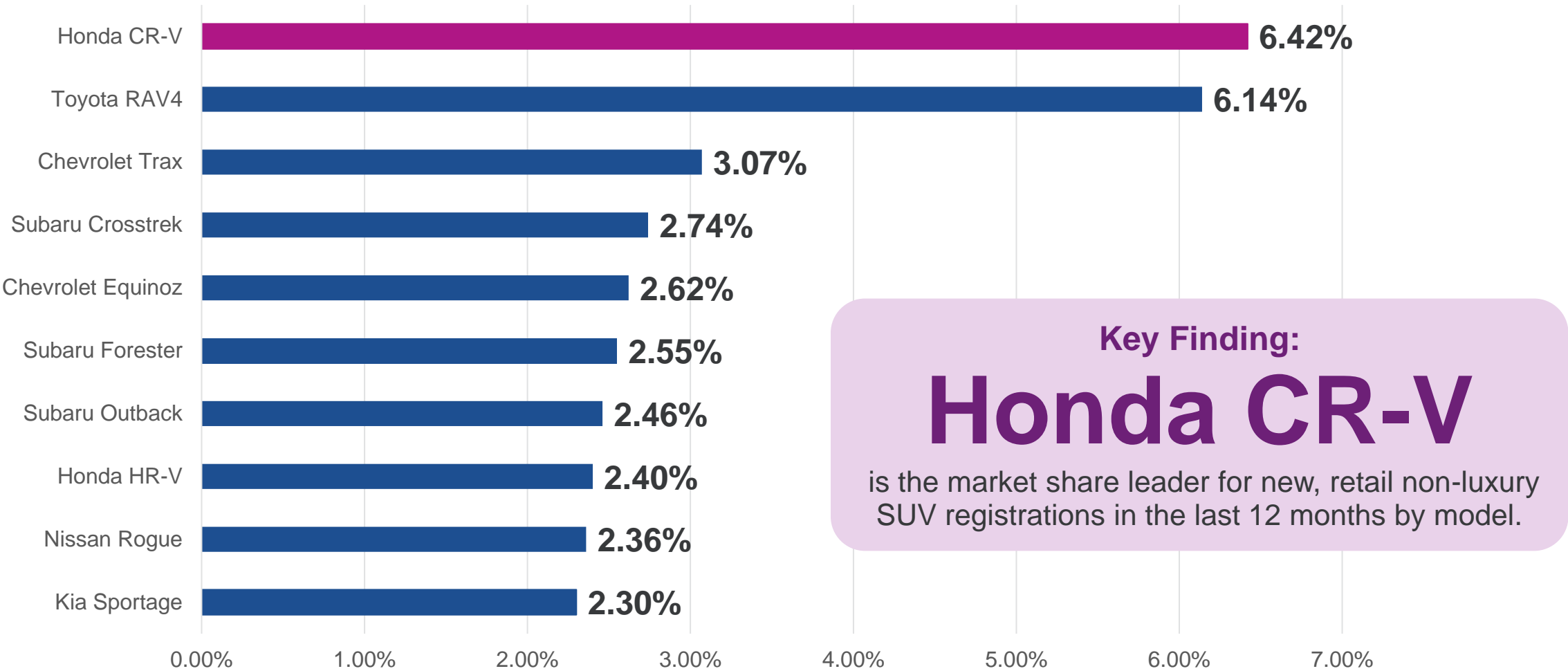
R12 Top 5 New, Retail Non-Luxury SUV Registration Market Share %

By Non-Luxury Vehicle Class and Make



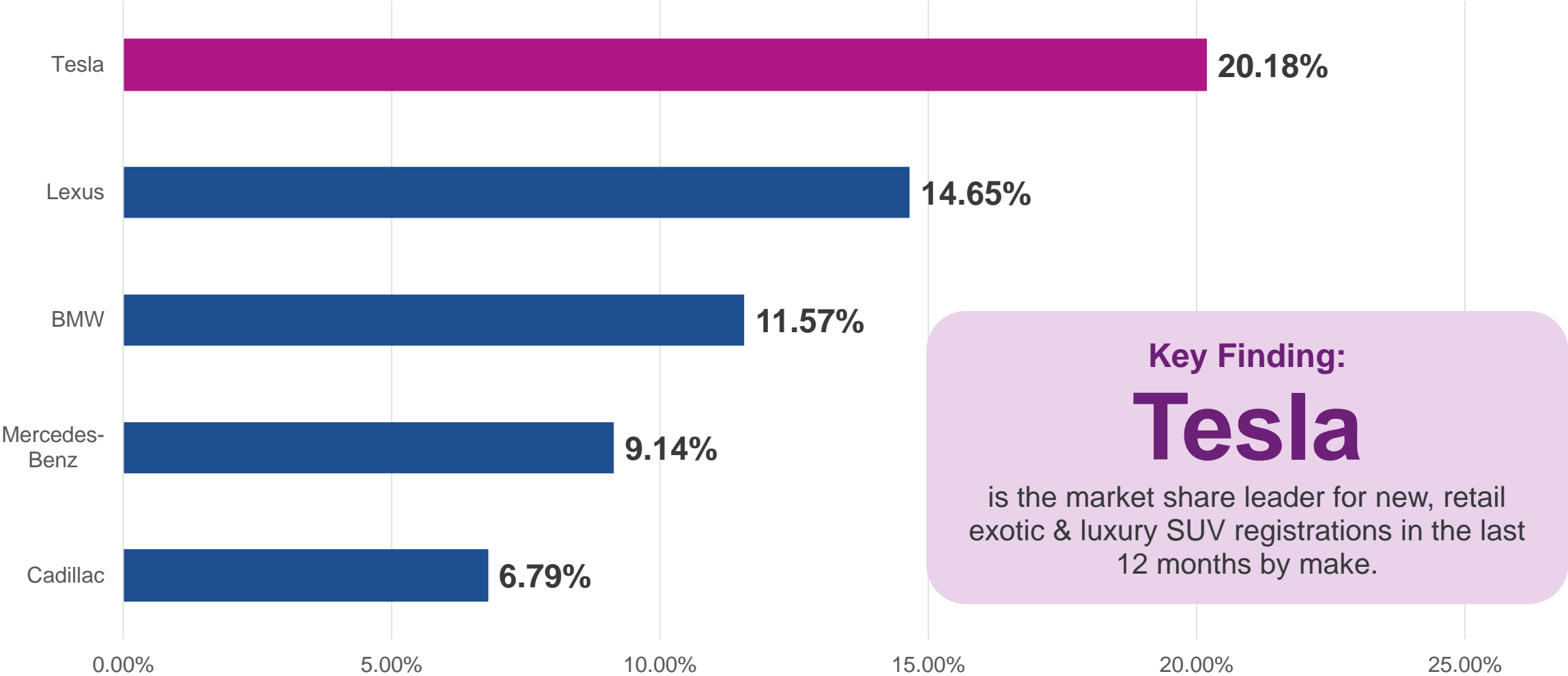
R12M Top 10 New, Retail Non-Luxury SUV Registration Market Share %

By Non-Luxury Vehicle Class and Model



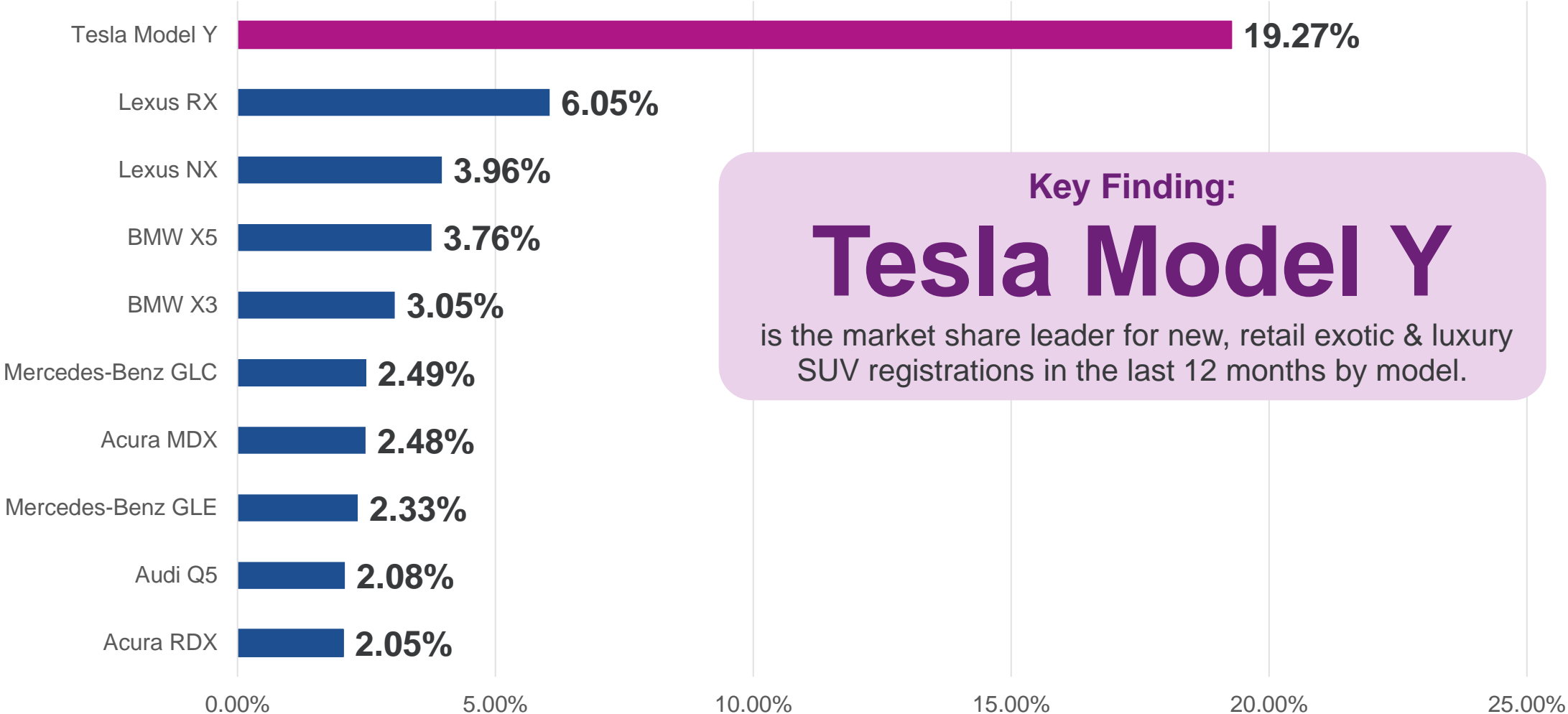
R12 Top 5 New, Retail Luxury SUV Registration Market Share %

By Exotic and Luxury Vehicle Class and Make



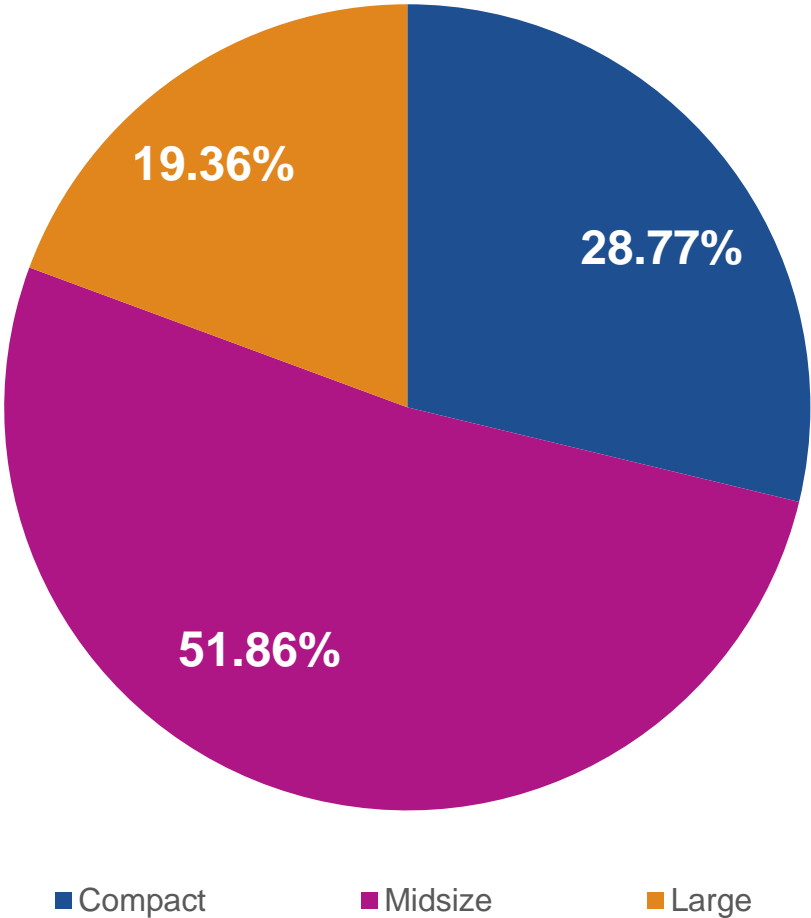
R12M Top 10 New, Retail Luxury SUV Registration Market Share %

By Exotic and Luxury Vehicle Class and Model



R12 New, Retail SUV Registration Market Share %

by Vehicle Sub-segment: Compact, Midsize & Large



Key Findings:

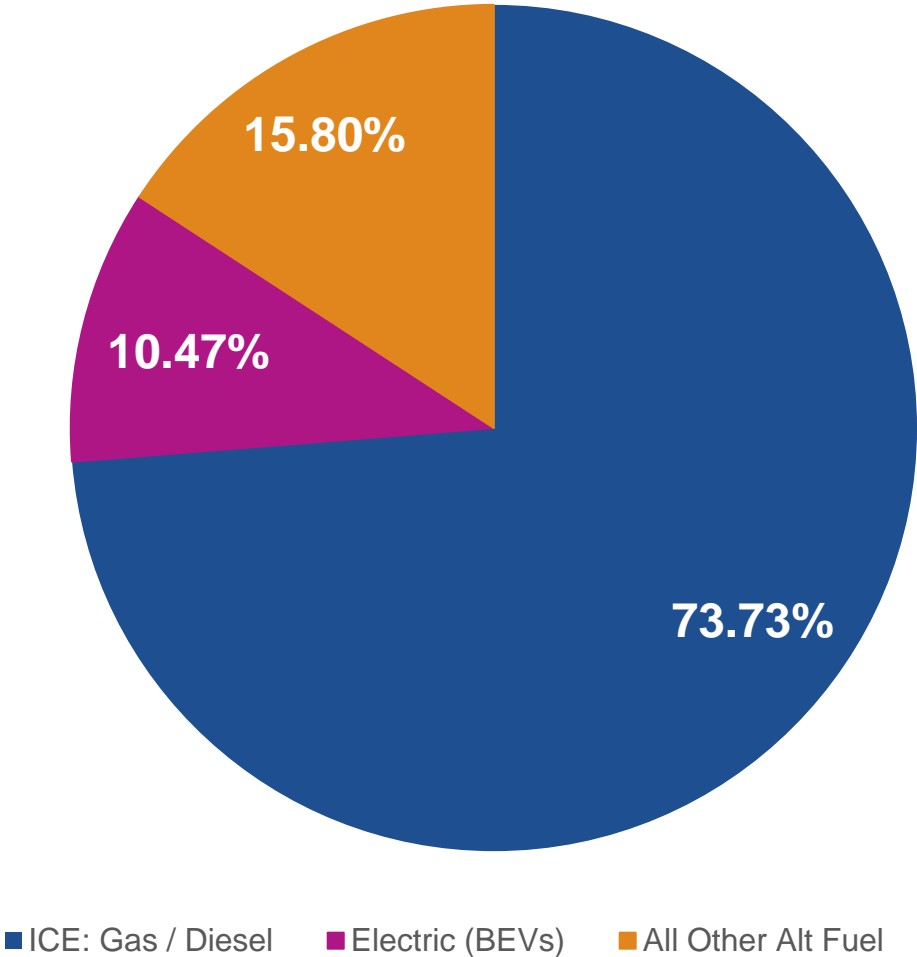
Compact SUVs account for
28.77%
of new, retail SUV registrations in
the last 12 months

Midsize SUVs account for
51.86%

Large SUVs account for
19.36%

R12 New, Retail SUV Registration Market Share %

By Fuel Type (Electric = BEVs)



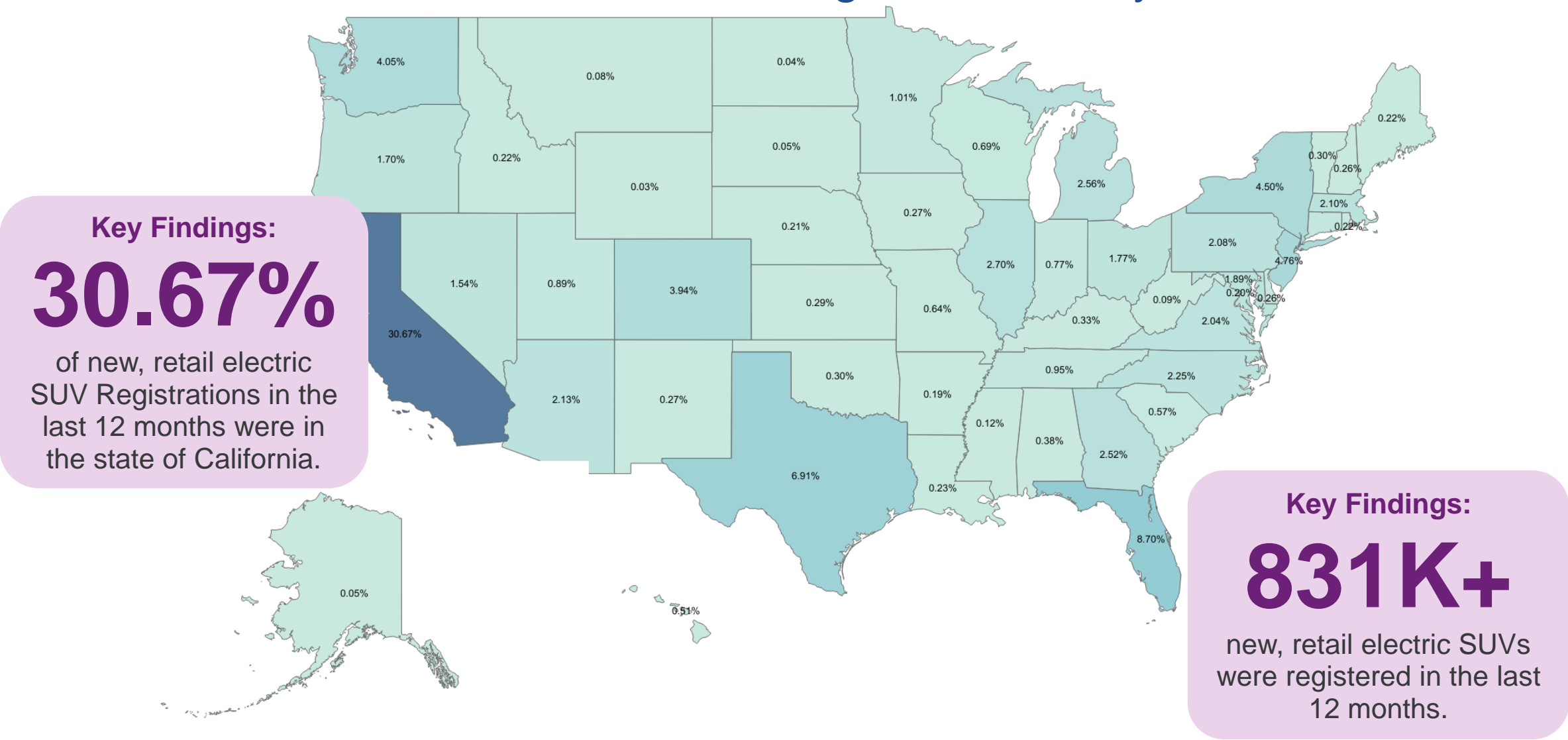
Key Findings:

ICE: Gas/Diesel SUVs account for
73.73%
of new, retail registrations
in the last 12 months

Electric SUVs (BEVs) account for
10.47%

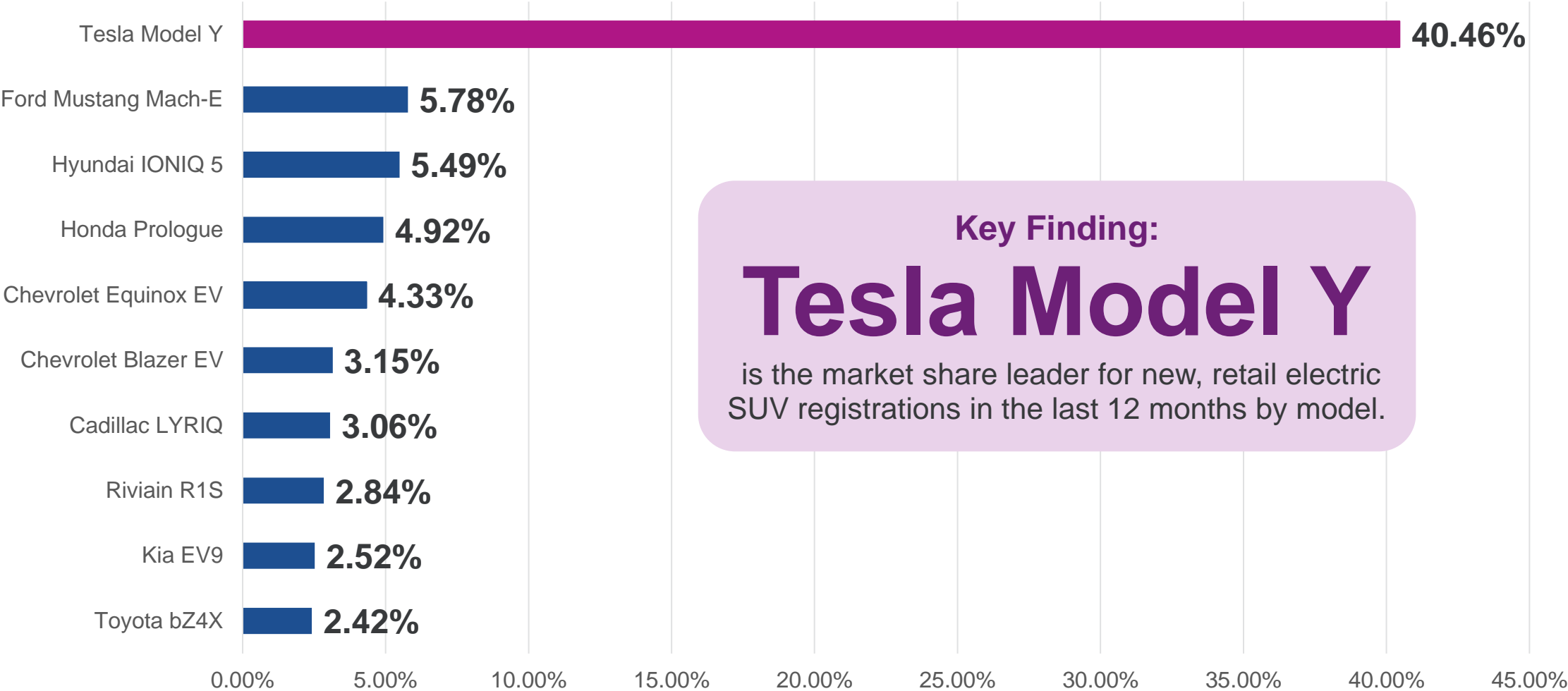
Other Alternative Fuel SUVs account for
15.80%

R12 U.S. New, Retail Electric SUV Registration % by State

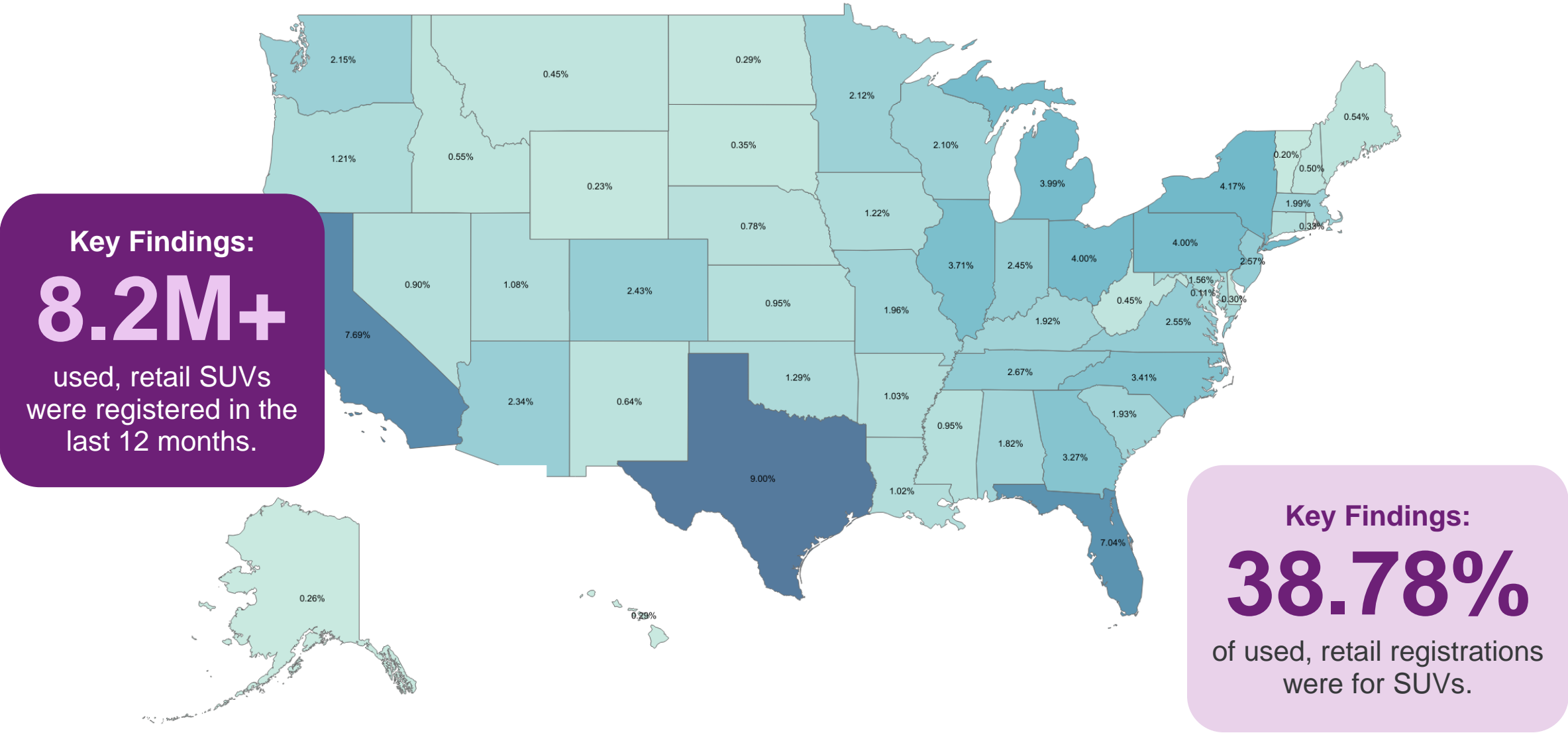


R12M Top 10 New, Retail Electric SUV Registration Market Share %

By Electric Vehicle (BEV) Fuel Type and Model

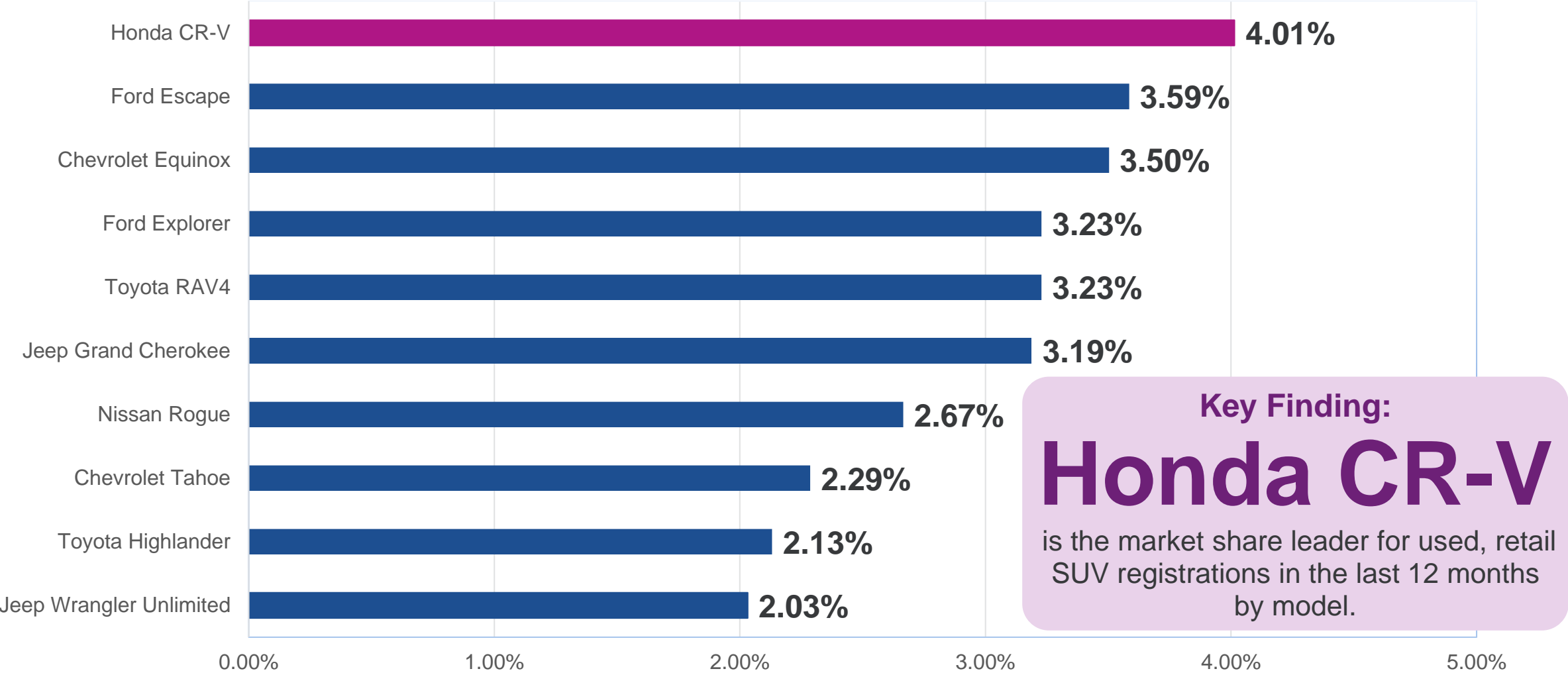


R12 U.S. Used, Retail SUV Registration % by State



R12M Top 10 Used, Retail SUV Registration Market Share %

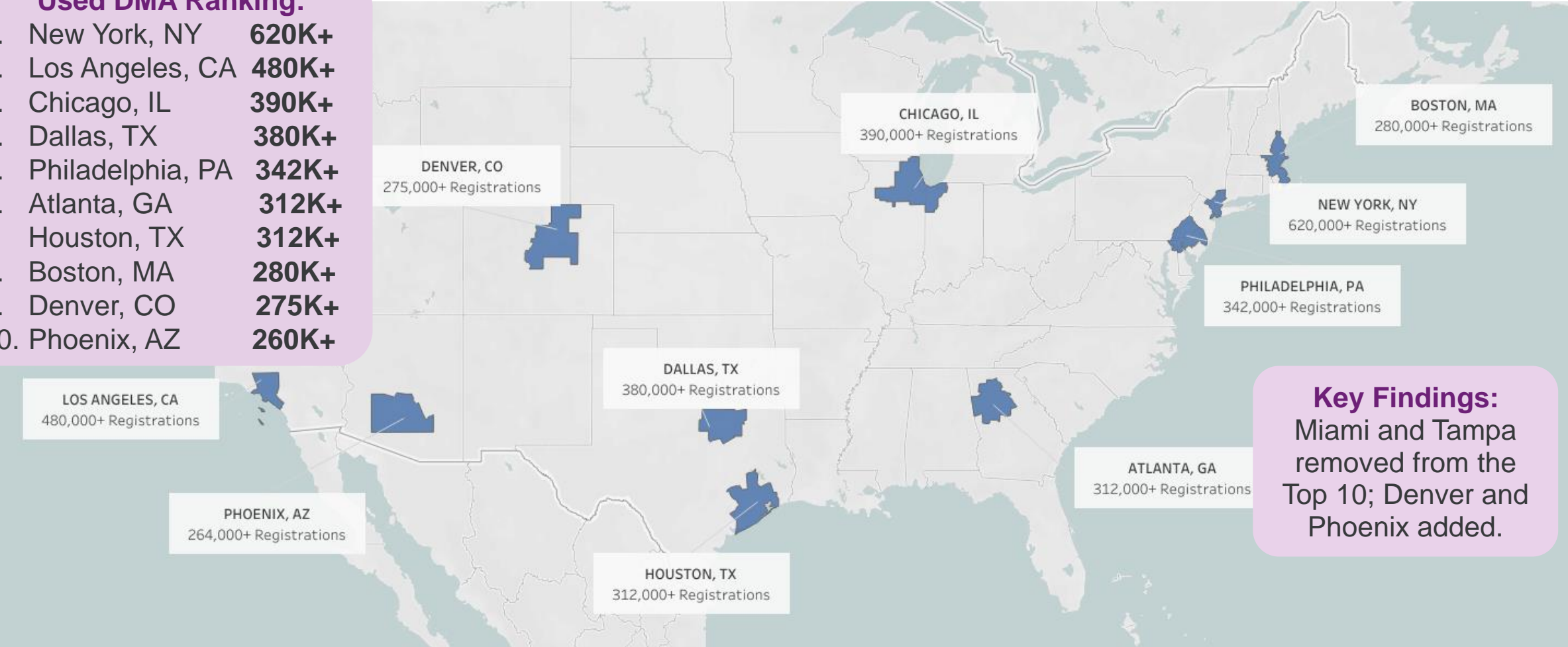
By Model



R12M Top U.S. DMAs for Used, Retail SUV Registrations

Used DMA Ranking:

- 1. New York, NY 620K+
- 2. Los Angeles, CA 480K+
- 3. Chicago, IL 390K+
- 4. Dallas, TX 380K+
- 5. Philadelphia, PA 342K+
- 6. Atlanta, GA 312K+
- 7. Houston, TX 312K+
- 8. Boston, MA 280K+
- 9. Denver, CO 275K+
- 10. Phoenix, AZ 260K+



Key Findings:
Miami and Tampa removed from the Top 10; Denver and Phoenix added.

Q1 Summary Insights

What are they Driving



SUVs represent **62.81%** of new, retail registrations in the last 12 months; **78.02%** are non-luxury, **21.91%** are luxury, and **0.08%** are exotic SUV models.



Toyota has the largest market share for new, retail SUV registrations by make with **10.10%**, followed closely by Honda with **9.57%**.



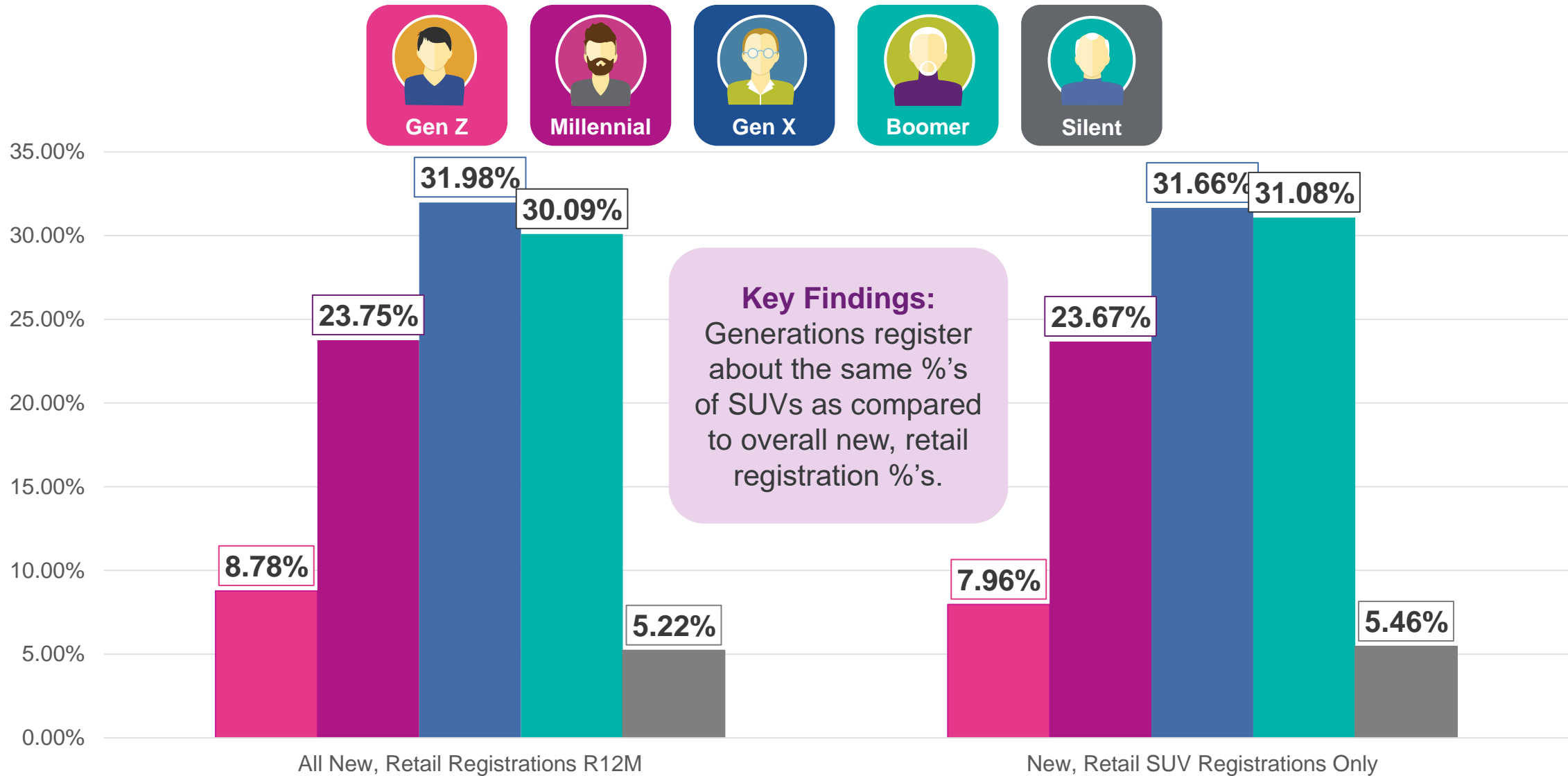
Tesla is the market share leader for luxury and exotic new, retail SUV registrations with **20.18%** market share by make.

Q1 2025 Who are these buyers?

- Demographic information
- Generational insights
- Lifestyle segmentation

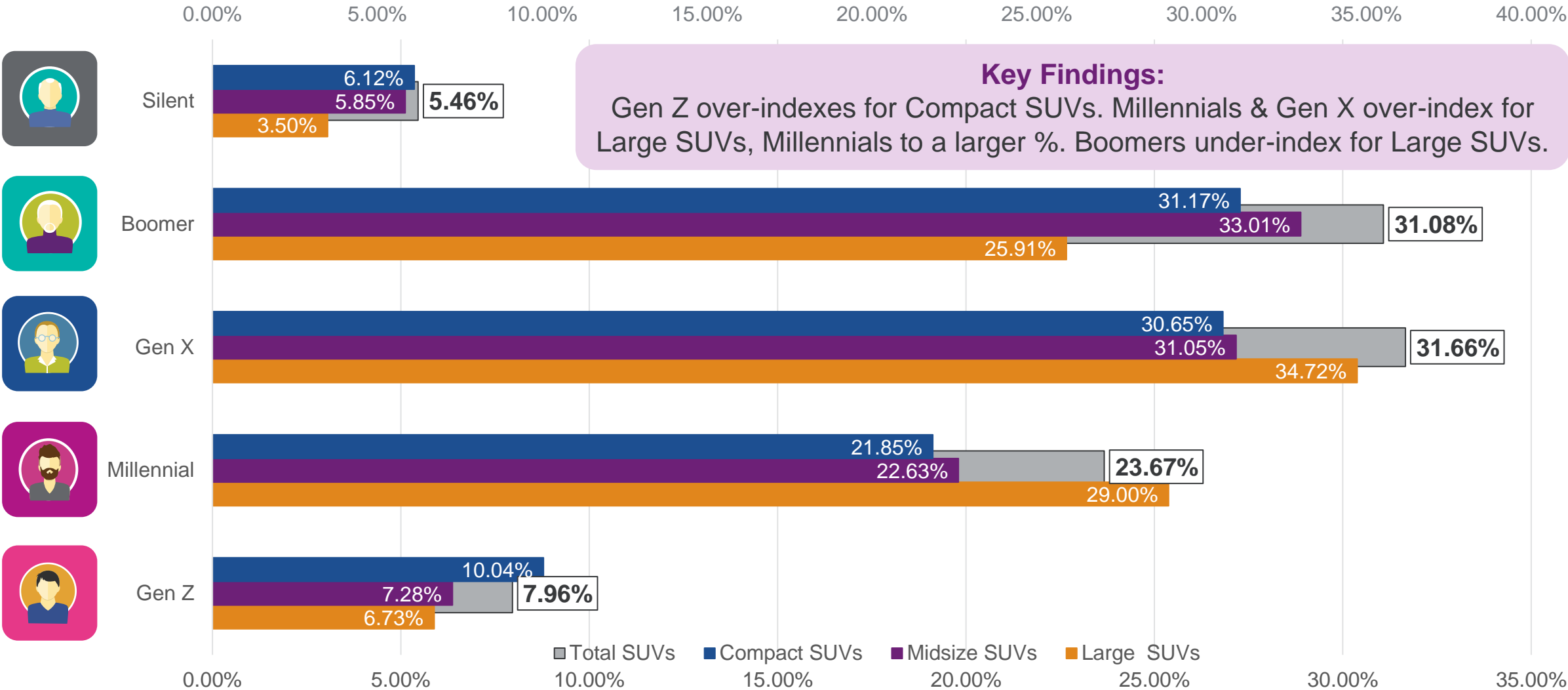


R12M New, Retail SUV Registration % by Generation



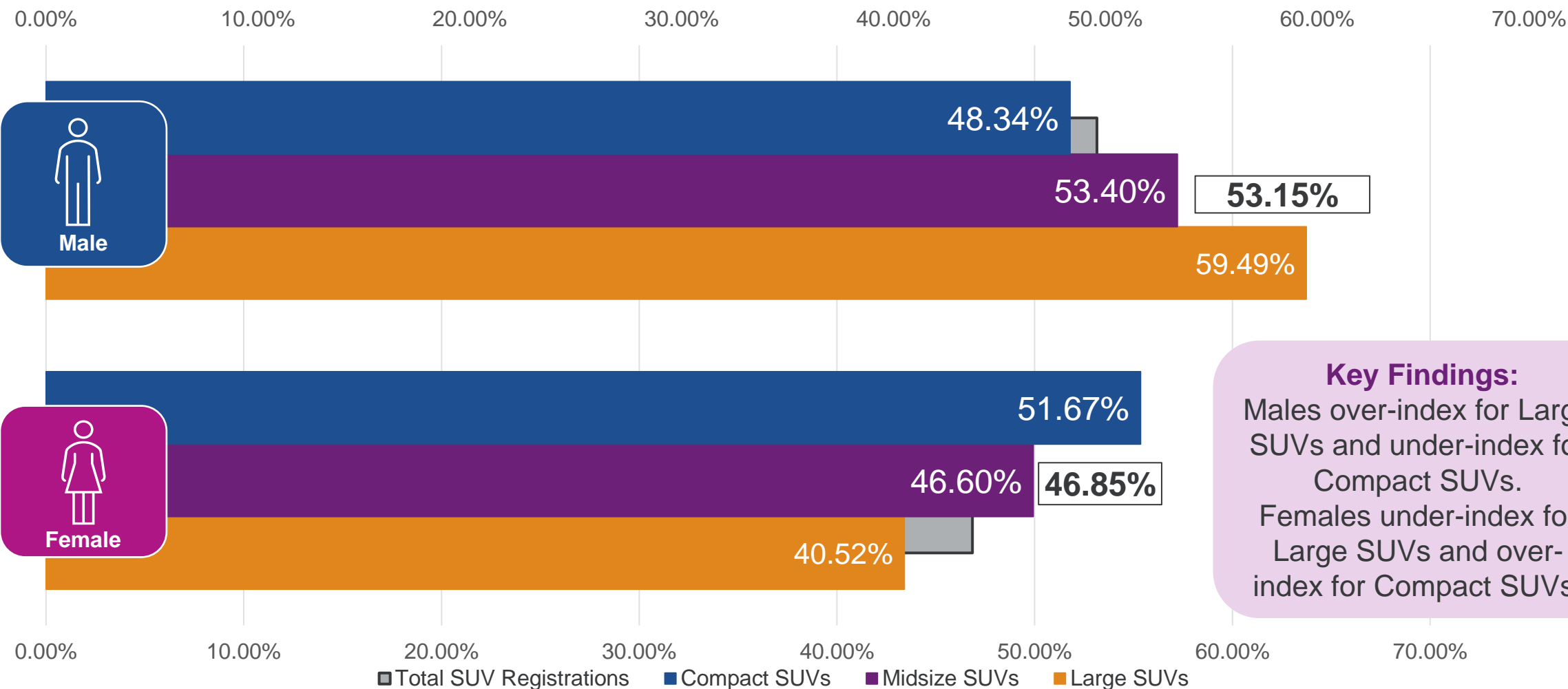
R12M New, Retail SUV Registration Market Share %

By Generation and Vehicle Sub-Segment



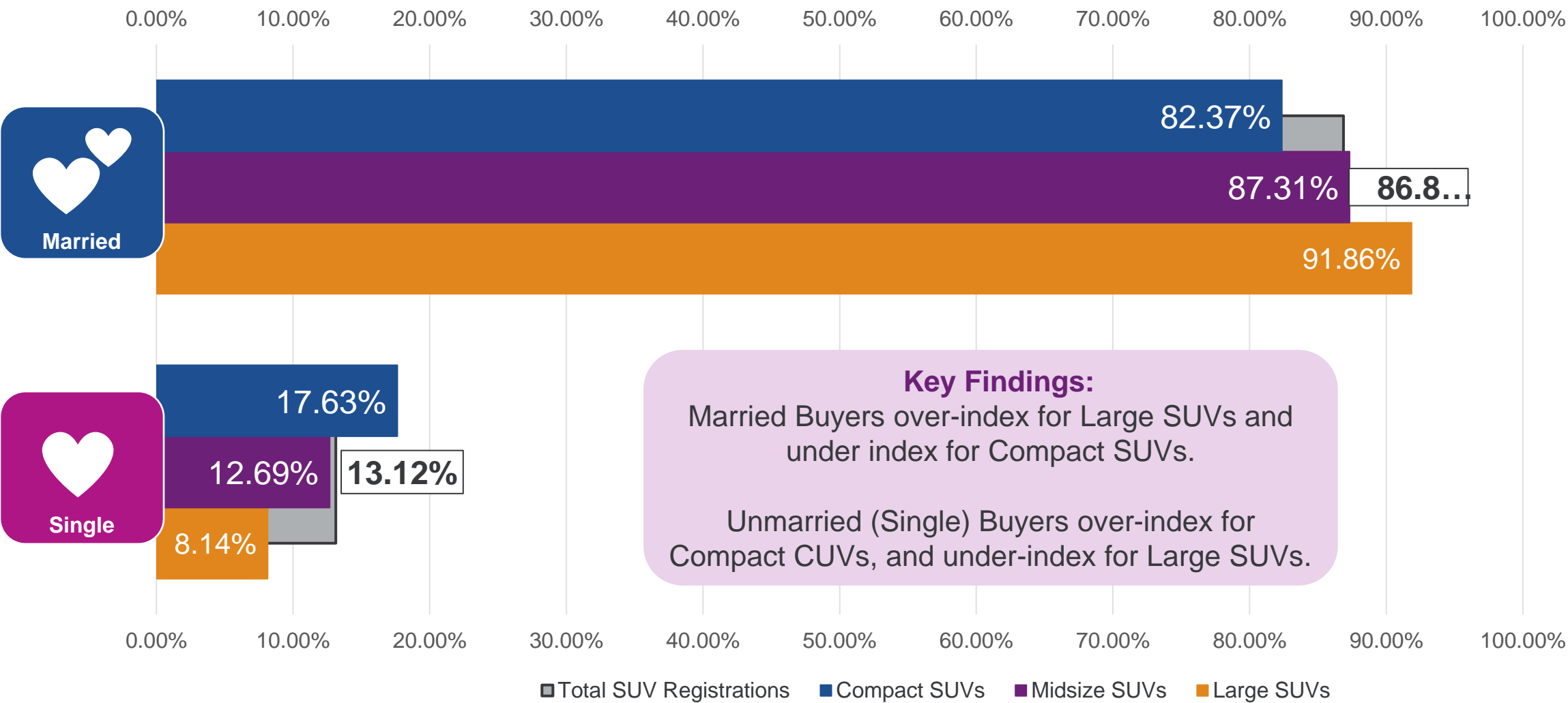
R12M New, Retail SUV Registration Market Share %

By Gender and Vehicle Sub-Segment



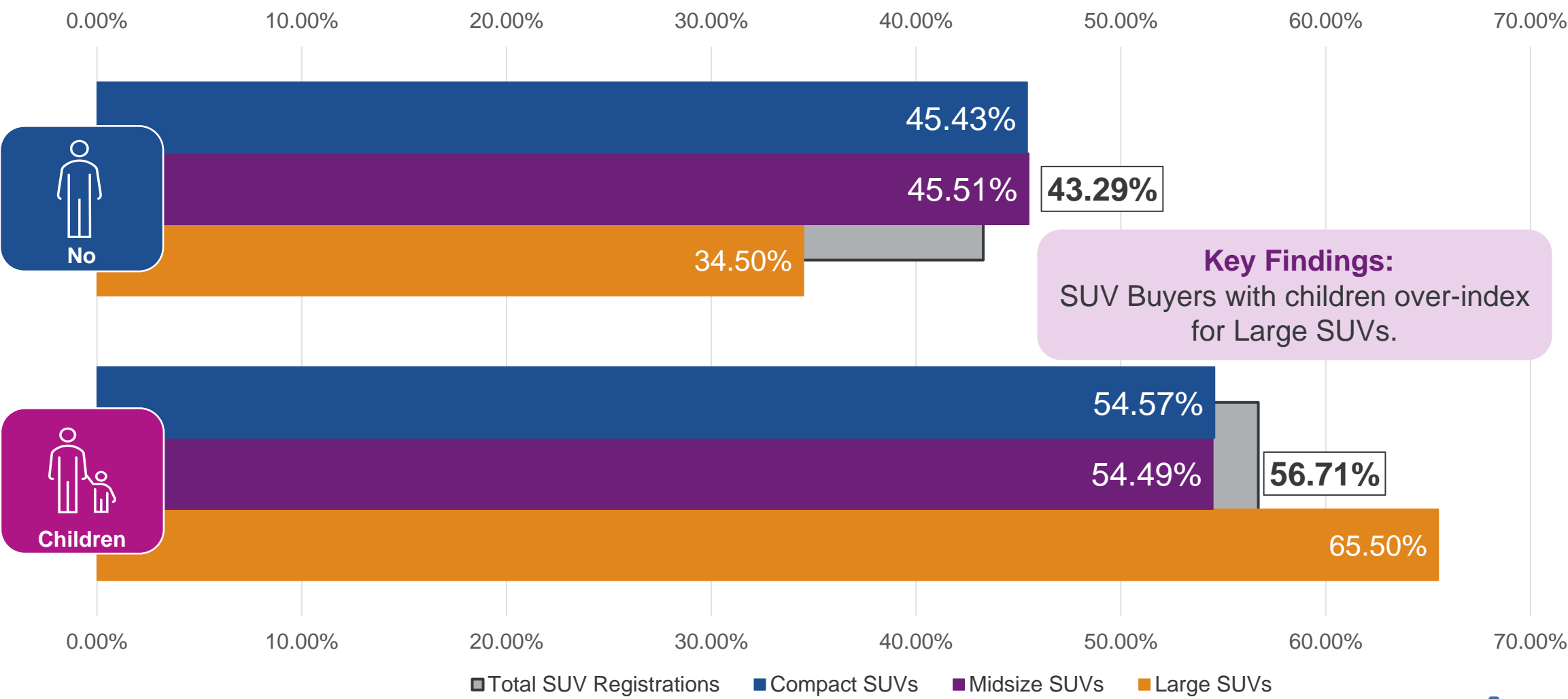
R12M New, Retail SUV Registration Market Share %

By Marital Status



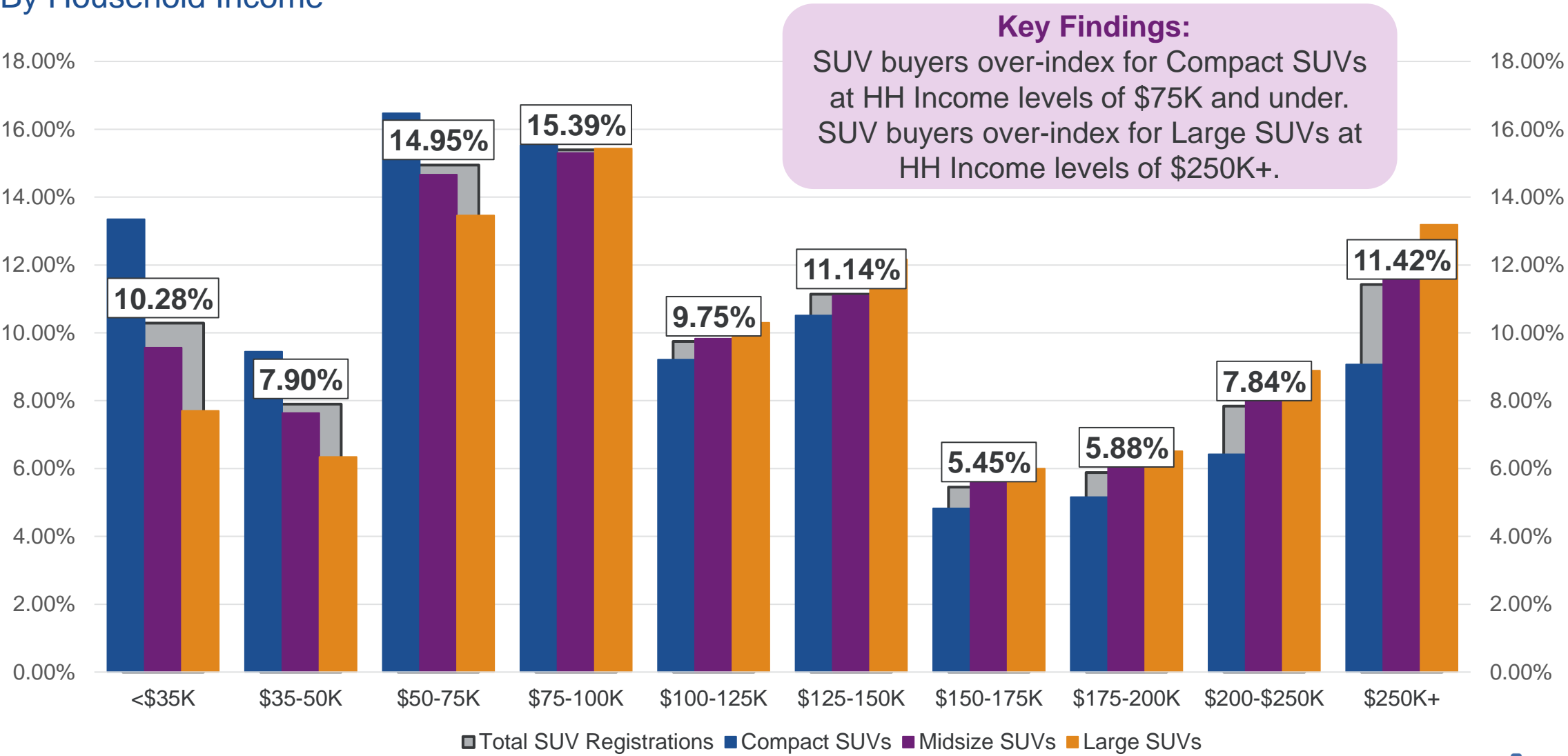
R12M New, Retail SUV Registration Market Share %

By Presence of Children



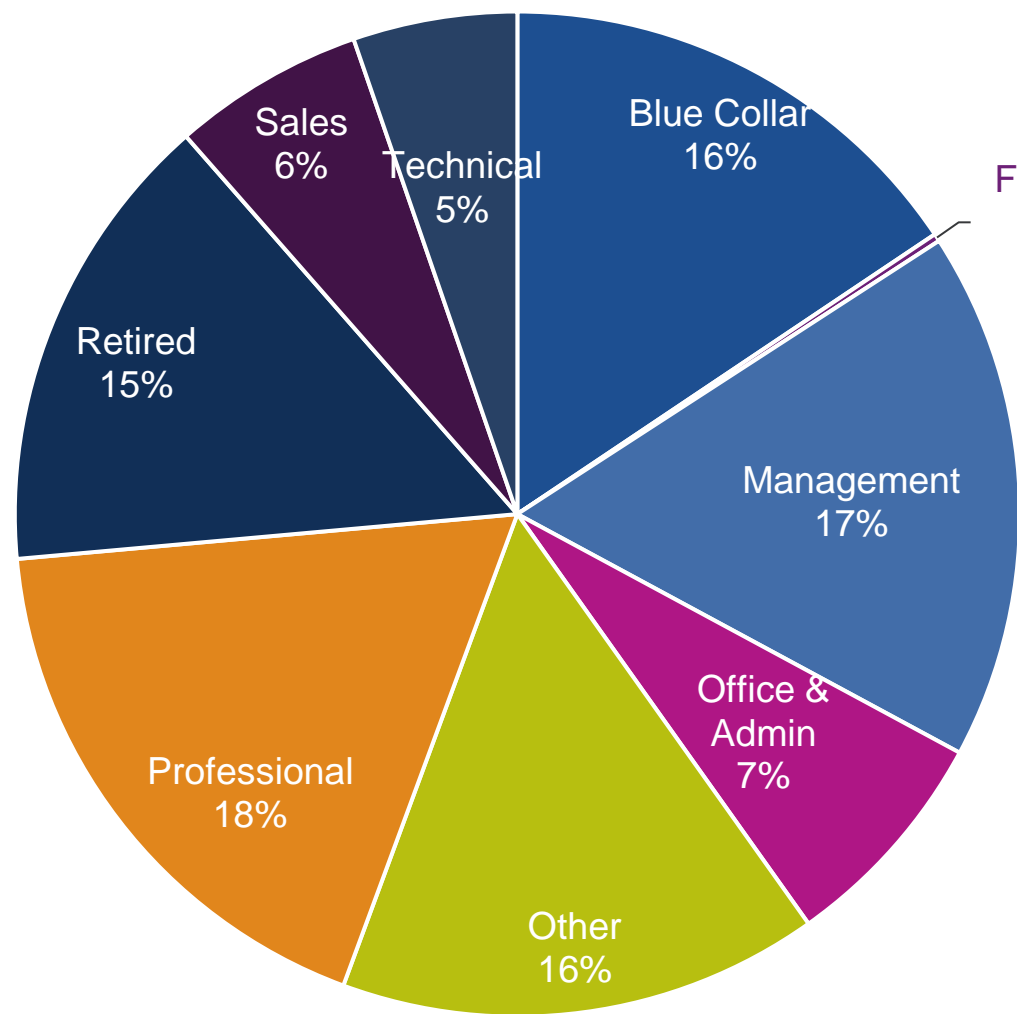
R12M New, Retail SUV Registration Market Share %

By Household Income



R12M New Retail SUV Registration Market Share %

By Buyer Occupation

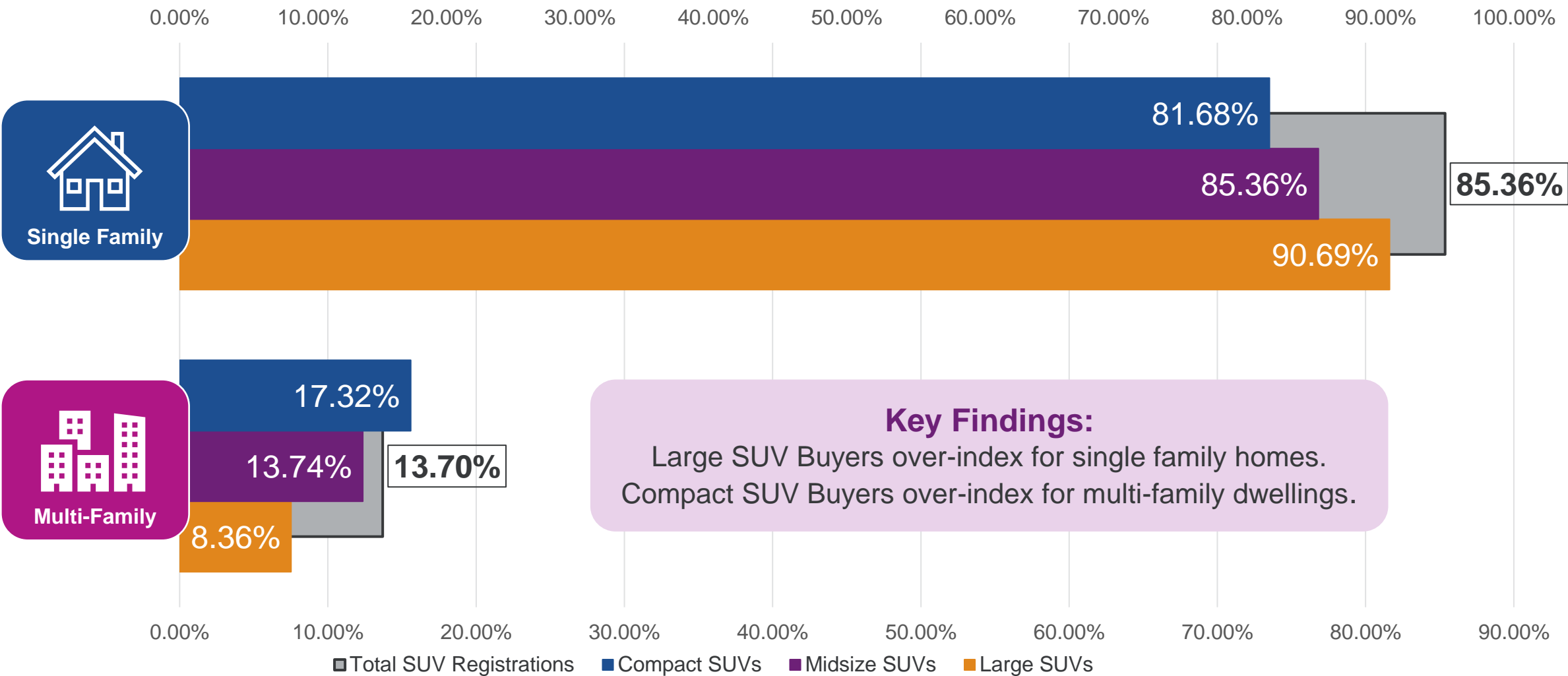


Key Findings:
Professional is the highest buyer occupation market share percentage for new, retail SUV buyers.

- Blue Collar
- Farming/Fishing/Forestry
- Management
- Office & Admin
- Other
- Professional
- Retired
- Sales
- Technical

R12M New, Retail SUV Registration Market Share %

By Dwelling Type

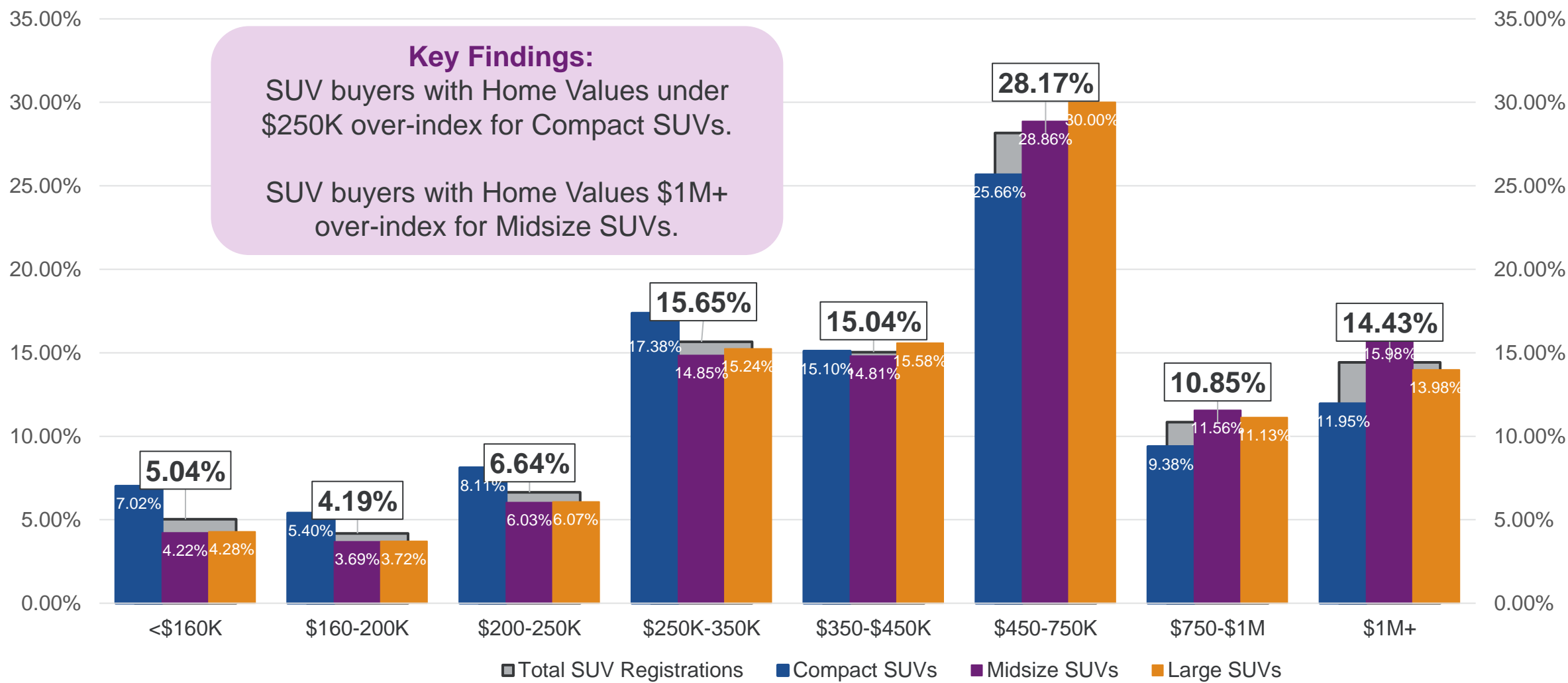


Key Findings:

Large SUV Buyers over-index for single family homes.
Compact SUV Buyers over-index for multi-family dwellings.

R12M New, Retail SUV Registration Market Share %

By Home Value



Q1 Demographic Summary Insights



Consumer demographics vary across SUV sub-segments



Targeting specific consumers for your marketing campaigns is critical for success



Lifestyle segmentation can help you create precision marketing campaigns



Q1 2025 Meaningful Customer Segmentation is Critical

We deliver house-hold- 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

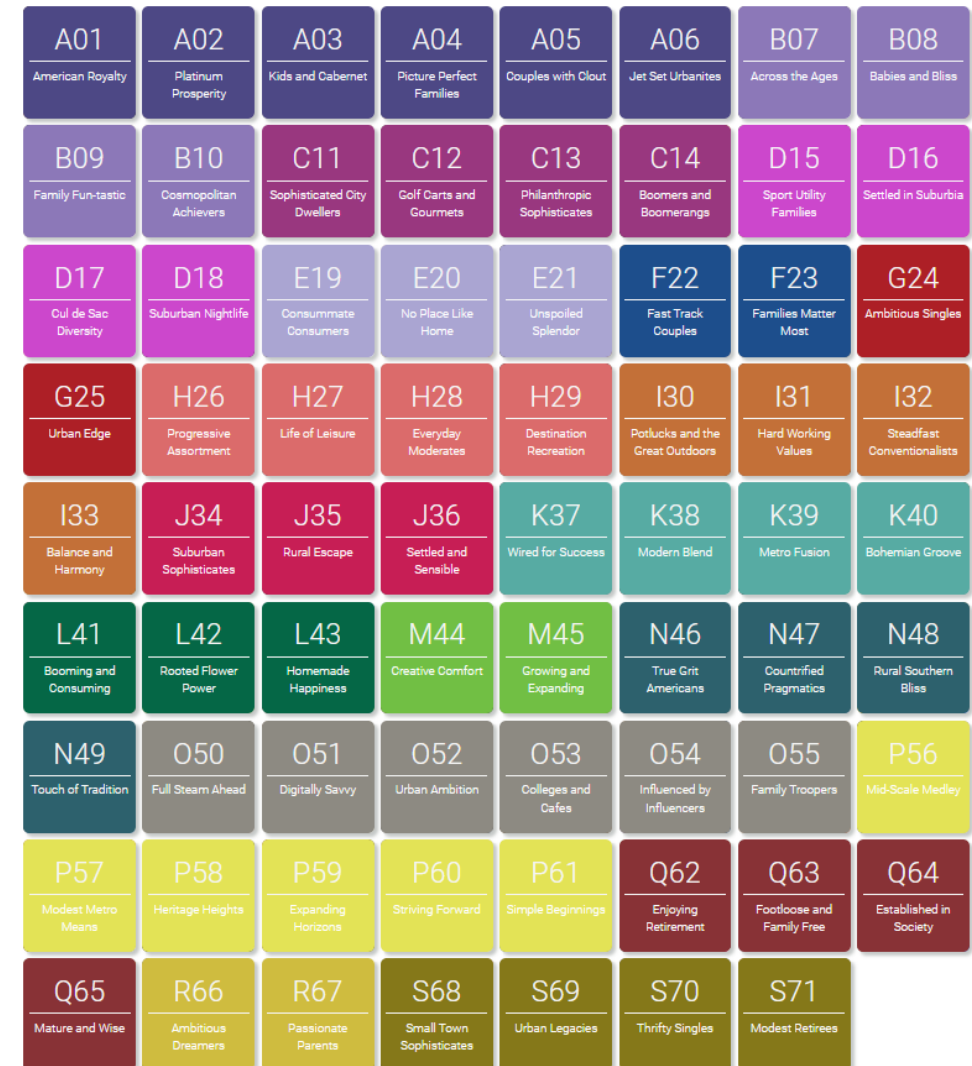
Experian Mosaic divides the marketable U.S. population into **19** Groups and **71** more detailed Types.

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 SUV Buyers

Top 5 Mosaic Lifestyle Segmentation Types

C13

Philanthropic Sophisticates

A01

American Royalty

F22

Fast Track Couples

A05




Couples with Clout

D16

Settled in Suburbia



Top 3 Lifestyle Segments for New Retail SUV Buyers

	 C13: Philanthropic Sophisticates	 A01: American Royalty	 F22: Fast Track Couples
U.S. Population	11.3M	7.8M	6.7M
% Households	4.09%	2.26%	3.30%
% Individuals	4.92%	3.34%	2.57%
Overview	Mature, upscale couples in suburban homes	Affluent, influential and successful couples and families living in prestigious suburbs	Active, young, upper established suburban couples and families living upwardly-mobile lifestyles

Top 3 Lifestyle Segments for New Retail Car Buyers



C13:
Philanthropic Sophisticates



A01:
American Royalty



F22:
Fast Track Couples

General Insights

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

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

- Credit-aware
- Comfortable spender
- Active lifestyles
- Tech-savvy

Technology Adoption



Apprentices



Journeymen



Journeymen

Top 3 Lifestyle Segments for New Retail Car Buyers



C13:
**Philanthropic
Sophisticates**



A01:
**American
Royalty**



F22:
**Fast Track
Couples**

Top Buying Style

Brand
loyalists

Quality
matters

Savvy
researchers

Top 3 Channel Preferences

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



Top 5 Mosaic Lifestyle Segmentation Types



R12M New, Retail Exotic and Luxury SUV Buyers

Top 5 Mosaic Lifestyle Segmentation Types

A01

American Royalty

C13

Philanthropic Sophisticates

B10

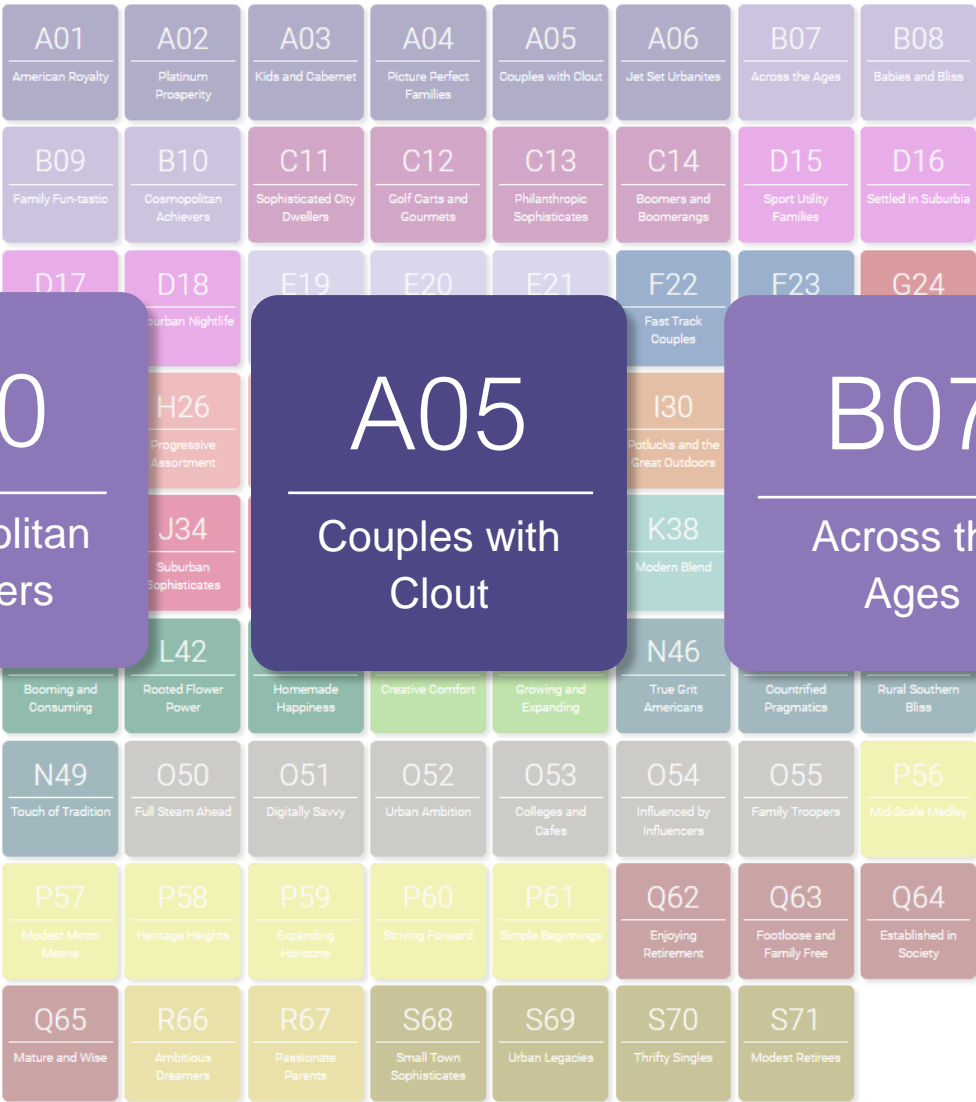
Cosmopolitan Achievers

A05

Couples with Clout

B07

Across the Ages



R12M Used, Retail SUV Buyers

Top 5 Mosaic Lifestyle Segmentation Types

O51

Digitally Savvy

F22

Fast Track Couples

I30

Potlucks and the Great Outdoors

C13

Philanthropic Sophisticates

D15

Sport Utility Families



Q1 Summary Insights New, Retail SUV Buyers



C13: Philanthropic Sophisticates

1. #1 buyers for new SUVs
2. Mature, upscale couples in suburban homes
3. Brand loyalists
4. Email #1



A01: American Royalty

1. #2 buyers for new SUVs
2. Affluent, influential and successful couples and families living in prestigious suburbs
3. Quality matters
4. Email #1



F22: Fast Track Couples

1. #3 buyers for new SUVs
2. Active, young, upper established suburban couples and families living upwardly-mobile lifestyles
3. Savvy researchers
4. Text #1

Q1 2025 Case Study



- Non-Luxury New, Retail SUV:
Subaru Outback
- #2 New, Retail Buyer Mosaic Lifestyle Segment:
J34: Suburban Sophisticates



#2 Mosaic Lifestyle Segment for New, Retail Subaru Outback Buyers

J34: Suburban Sophisticates

Established sophisticates living comfortable suburban lifestyles



Key Features

- Retired
- Financially secure
- AARP members
- Established homes
- In the market to lease non-luxury vehicles
- Keep vehicles for a few years

Who We Are

Head of household age 66–75 373 49.1%	Type of property Single family 112 99.4%
Est. Household income \$50,000–\$74,999 154 28.7%	Purchase/lease price \$30,000–\$40,000 146 23.9%
When purchased 48+ months ago 203 71.0%	Vehicle age 11+ years 123 79.6%



Channel Preference



Technology Adoption



Novices



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.

Q1 Vehicle Summary Insights



What are they driving

- SUVs represent 62.81% of new, retail registrations.
- Non-Luxury SUVs are 78.02% of the market and the Honda CR-V is the top model with 6.42% market share.
- Exotic & Luxury SUVs are 21.91% of the market and the Tesla Model Y is the top model with 19.27% market share.



Who are they

- There are differences between SUV buyers by vehicle segment and class.
- Gen Z SUV buyers over-index for Compact SUVs. Gen X & Boomers over-index for Large SUVs.
- Non-married SUV buyers over-index for Compact CUVs. SUV buyers with children over-index for Large SUVs.



How to Market to them

- Customize your audience, message and channel to your market and buyer as there are considerable differences between new and used, as well as luxury and non-luxury SUV buyers.
- Email is the preferred channel for the top 2 new, retail SUV lifestyle segment buyer.

Save the date



SAVE THE DATE:
September 2025



AUTOMOTIVE CONSUMER
TRENDS REPORT:
Q2 2025
Electric Vehicles





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 to access eBrochures



Automotive Consumer Trends

Stay informed



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**Experian Automotive
Market Insights.**



EXPERIAN AUTOMOTIVE REPORT TRENDS:



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QR Code

To view all of our
trend reports!

Or, click buttons below to access trend reports.



**Automotive Consumer
Trends Report**



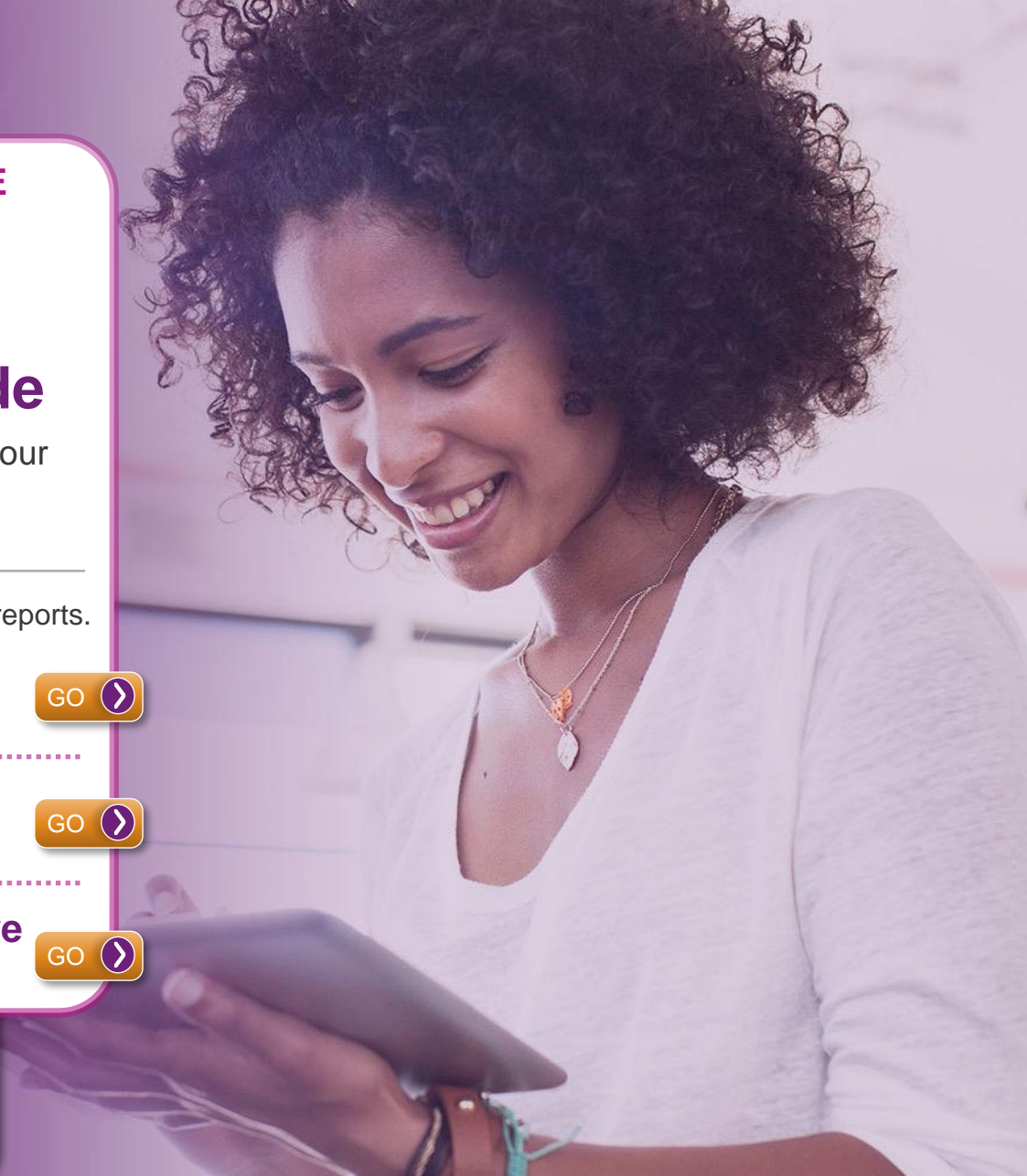
**Automotive Market
Trends Report**



**State of the Automotive
Finance Market Report**



FREE





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Experian_Auto**

GO



Special Report: Used Vehicle Insights



Cars



CUV/SUVs



Trucks



Vans



EVs

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Special Report Used Vehicle Insights

Automotive Market Insights for Used Vehicles Registrations.

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Special Report: Generational Insights



Gen Z



Millennial



Gen X



Boomer



Silent

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](#)



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 the passenger seat. The background shows a blurred green landscape through the car windows.

Experian Automotive

Thank You!

