



EXPERIAN AUTOMOTIVE

Q1 2026

Automotive Consumer Trends & Analysis

Kirsten Von Busch
Director, Product Marketing
June 11, 2026

Q1 Report overview



SUVs* – Q1 2026

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, 2026.

*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.

Rolling 12 Months (R12M) = April 2025 - March 2026.

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 Experian AutoCheck® vehicle history report and the Experian Marketing Engine.

Delivering high-quality automotive intelligence

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



VEHICLE DATA

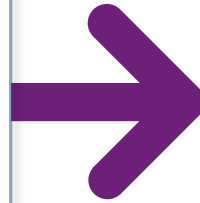


CONSUMER DATA



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 separate database assets.



North American Vehicle Data

1 Billion+

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

296.4M+

US VIO

29.5M+

Canadian VIO

24B+

Vehicle history records.

462.9M+

Title Brands.

460.6M+

Accident & damage related events.

358.6M+

Open Recall events.



Marketing Data

250M+

Individuals.

126M+

Households.

5,000

Consumer attributes.

550M

Mobile IDs.

300M+

Connected TV IDs.

900M

Hashed email.

3,500+

Audience segments including 1,100+ Auto Audiences.



Credit Data

CONSUMER

2M+

Credit inquiries daily.

1.3B+

Transaction updates/month.

245M+

Credit active consumers.

50M+

Public records.

98%

Updates within 24 hours.

Sub-second

Credit report response rate.

BUSINESS

25M+

Source: Experian North American Vehicle Database 4/2026. VIO 12/2025

Q1 2026 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 2026 Total*
298.0
MILLION
Vehicles on the road

Q1 2026 VIO changes


Q1 2025 Total*
293.5
MILLION
Vehicles on the road


15.8
MILLION
NEW Vehicles
Registered


11.3
MILLION
Vehicles went
out of operation

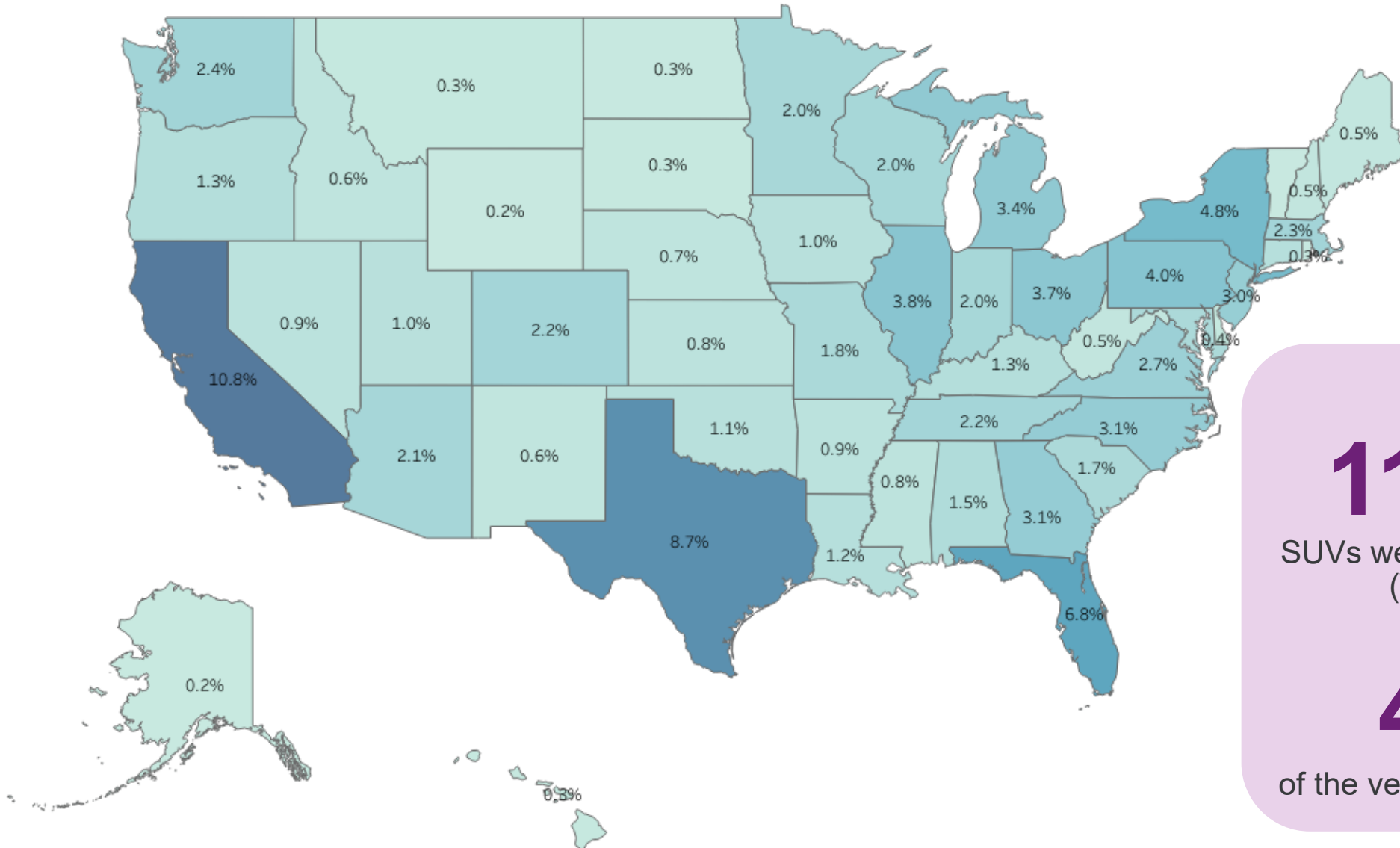

39.7
MILLION
USED vehicles
changed owners

=


28.1%
Total VIO
changes¹

*U.S. Vehicles in Operation data as of Mar 31, 2025 and 2026, 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 2026 U.S. SUVs in Operation (VIO) Market Share % by State



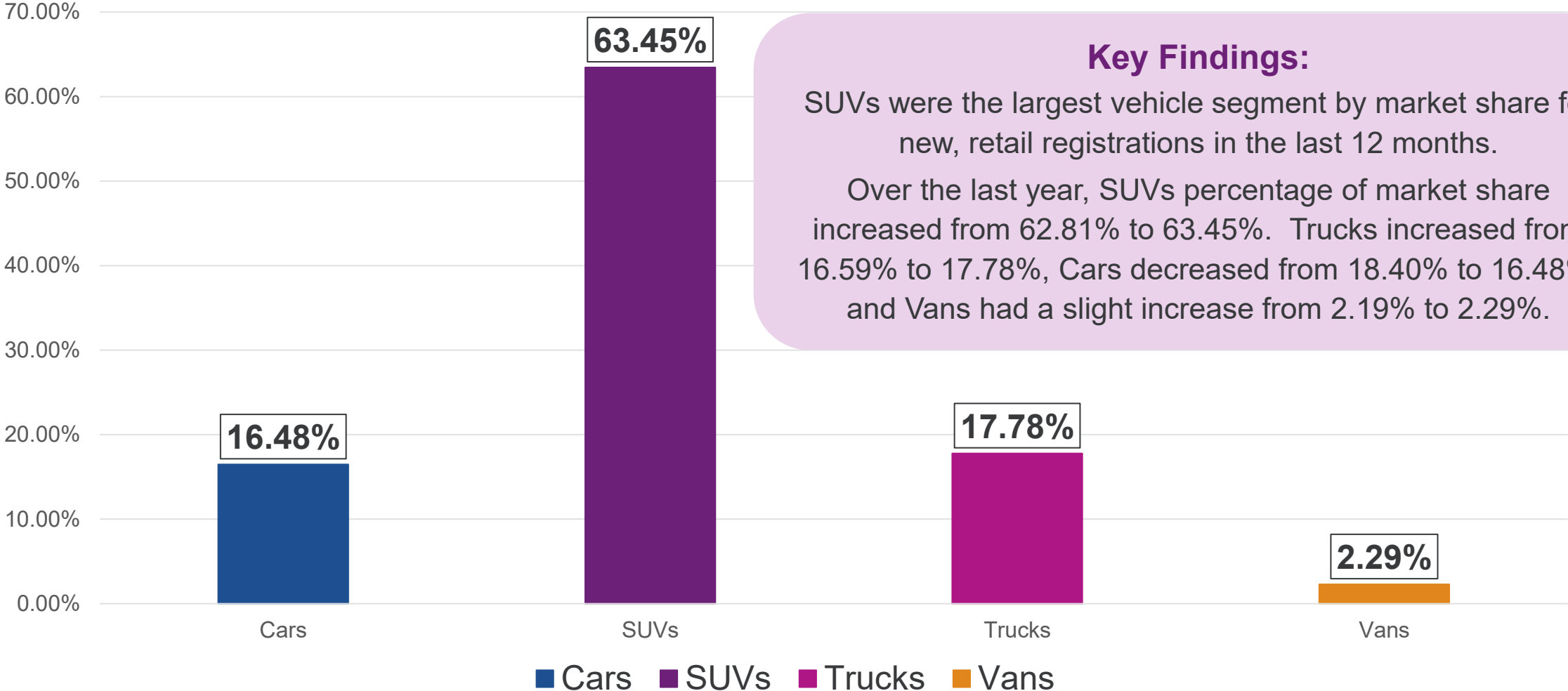
Key Findings:

117.03M+
SUVs were on the road as of Q1 2026
(Vehicles in Operation)

42.23%
of the vehicles on the road were SUVs

R12M New, Retail Registrations Market Share %

By vehicle segment



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

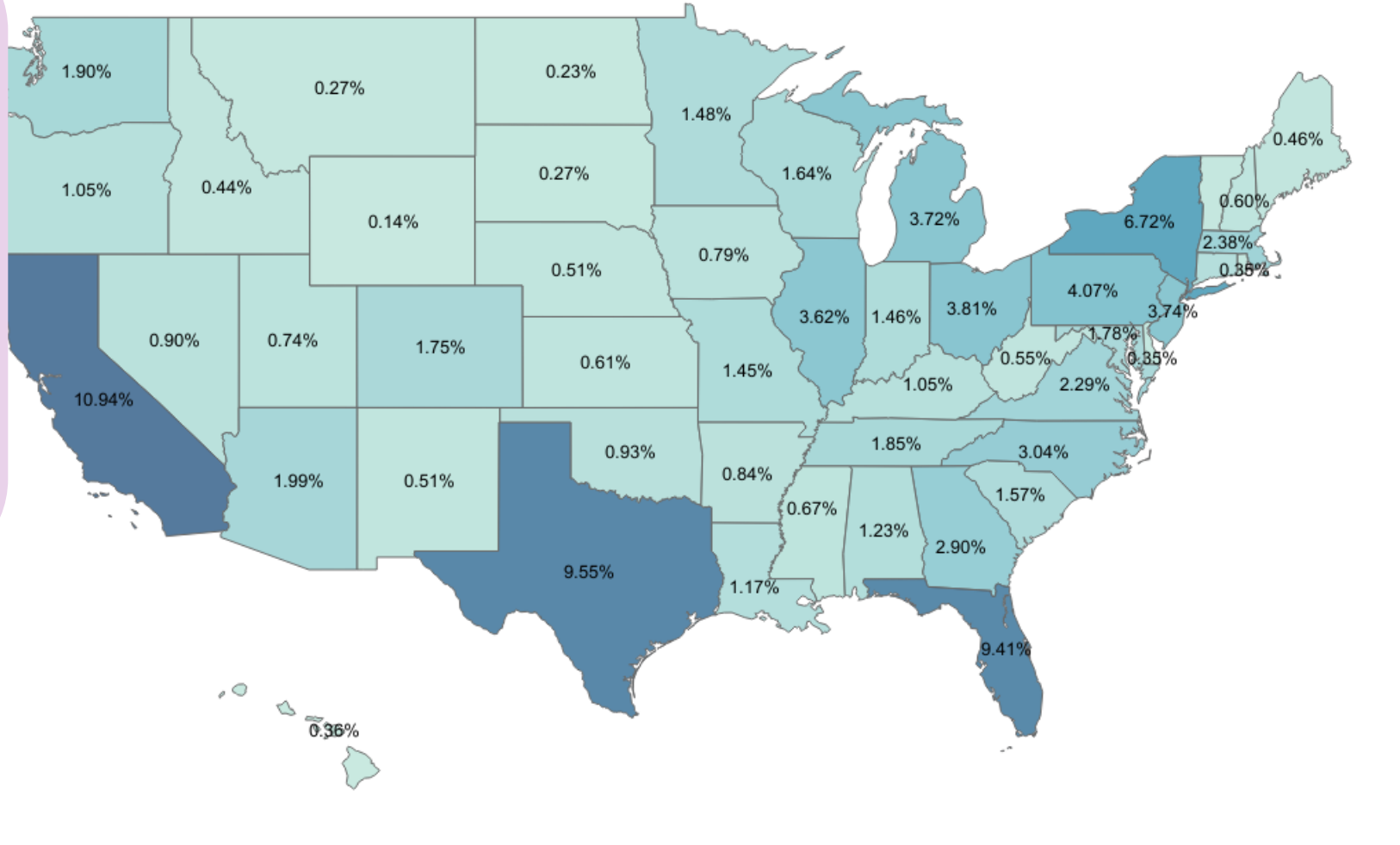
Key Findings:

7.80M+

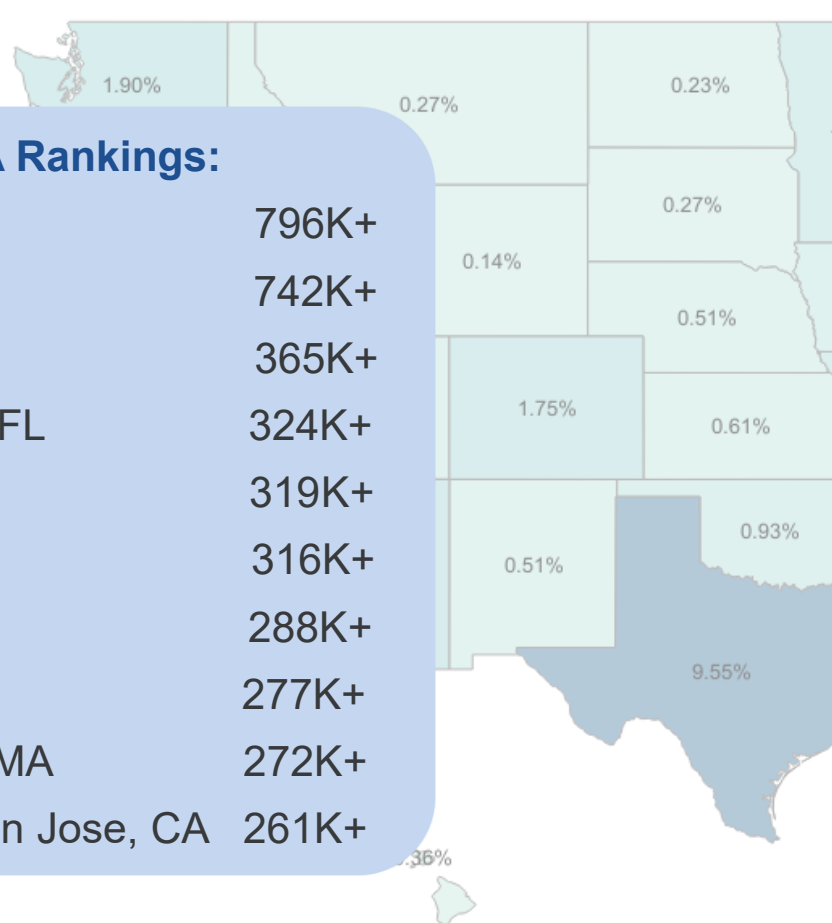
new, retail SUVs were registered in the last 12M

63.45%

of new, retail registrations were for SUVs. While the market share % of SUVs for Q1 2026 was higher than Q1 2025, the volume was lower. The Q1 2025 SUV volume was 7.94M+.



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



New, Retail DMA Rankings:

- | | | |
|-----|--------------------------------|-------|
| 1. | New York, NY | 796K+ |
| 2. | Los Angeles, CA | 742K+ |
| 3. | Dallas-Ft Worth, TX | 365K+ |
| 4. | Miami-Ft. Lauderdale, FL | 324K+ |
| 5. | Houston, TX | 319K+ |
| 6. | Chicago, IL | 316K+ |
| 7. | Philadelphia, PA | 288K+ |
| 8. | Detroit, MI | 277K+ |
| 9. | Boston (Manchester), MA | 272K+ |
| 10. | San Francisco-Oak-San Jose, CA | 261K+ |



New, Retail, SUV DMA Rankings:

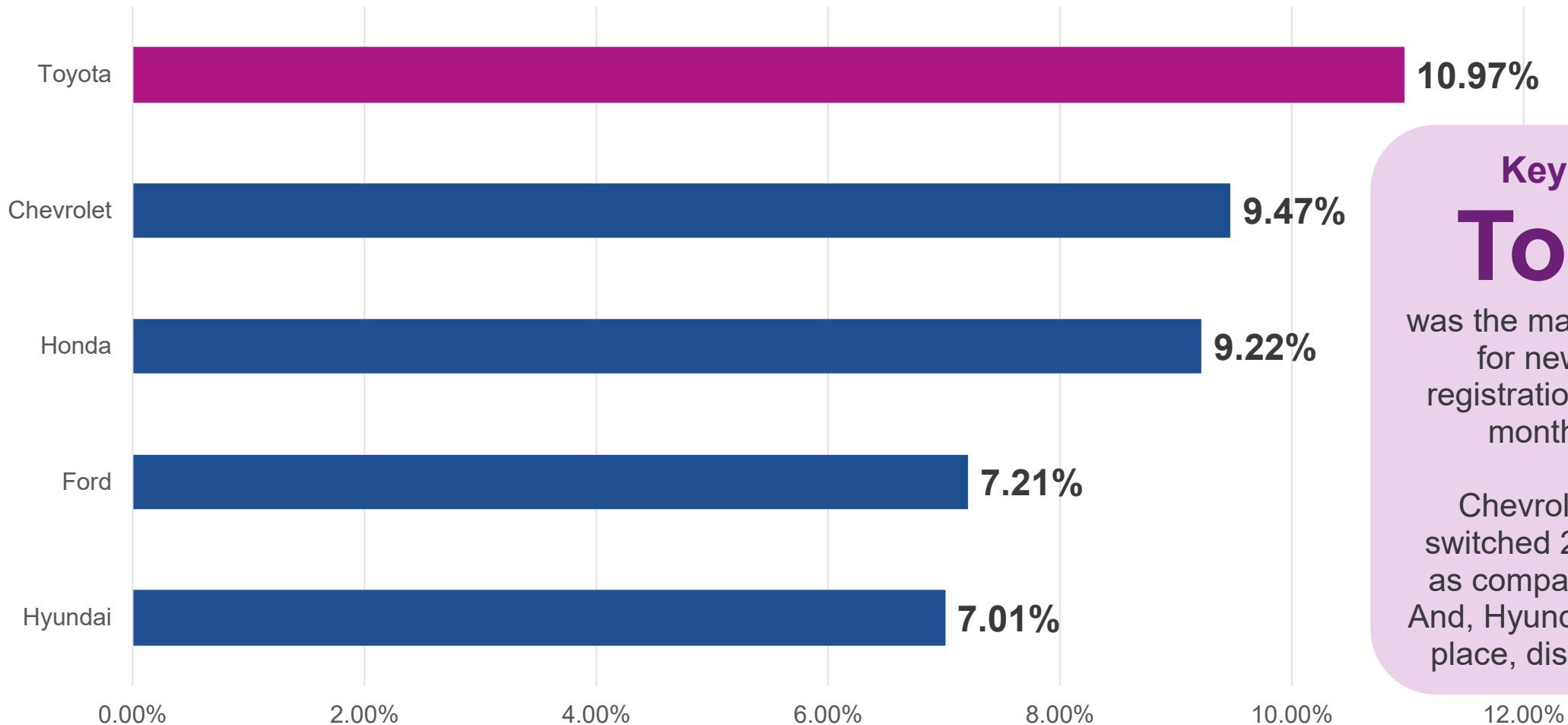
- | | | | |
|-----|--------------------------------|-------|---|
| 1. | New York, NY | 594K+ | ▬ |
| 2. | Los Angeles, CA | 434K+ | ▬ |
| 3. | Chicago, IL | 225K+ | ▲ |
| 4. | Dallas-Ft Worth, TX | 218K+ | ▼ |
| 5. | Miami-Ft. Lauderdale, FL | 209K+ | ▼ |
| 6. | Philadelphia, PA | 203K+ | ▲ |
| 7. | Boston (Manchester), MA | 192K+ | ▲ |
| 8. | Detroit, MI | 187K+ | ▬ |
| 9. | Houston, TX | 187K+ | ▼ |
| 10. | San Francisco-Oak-San Jose, CA | 169K+ | ▬ |

▲ = the DMA ranked **higher** for **SUVs** than the overall new, retail DMA ranking

▼ = the DMA ranked **lower** for **SUVs** than the overall new, retail DMA ranking

R12M Top 5 New, Retail SUV Registration Market Share %

By vehicle make



Key Finding:

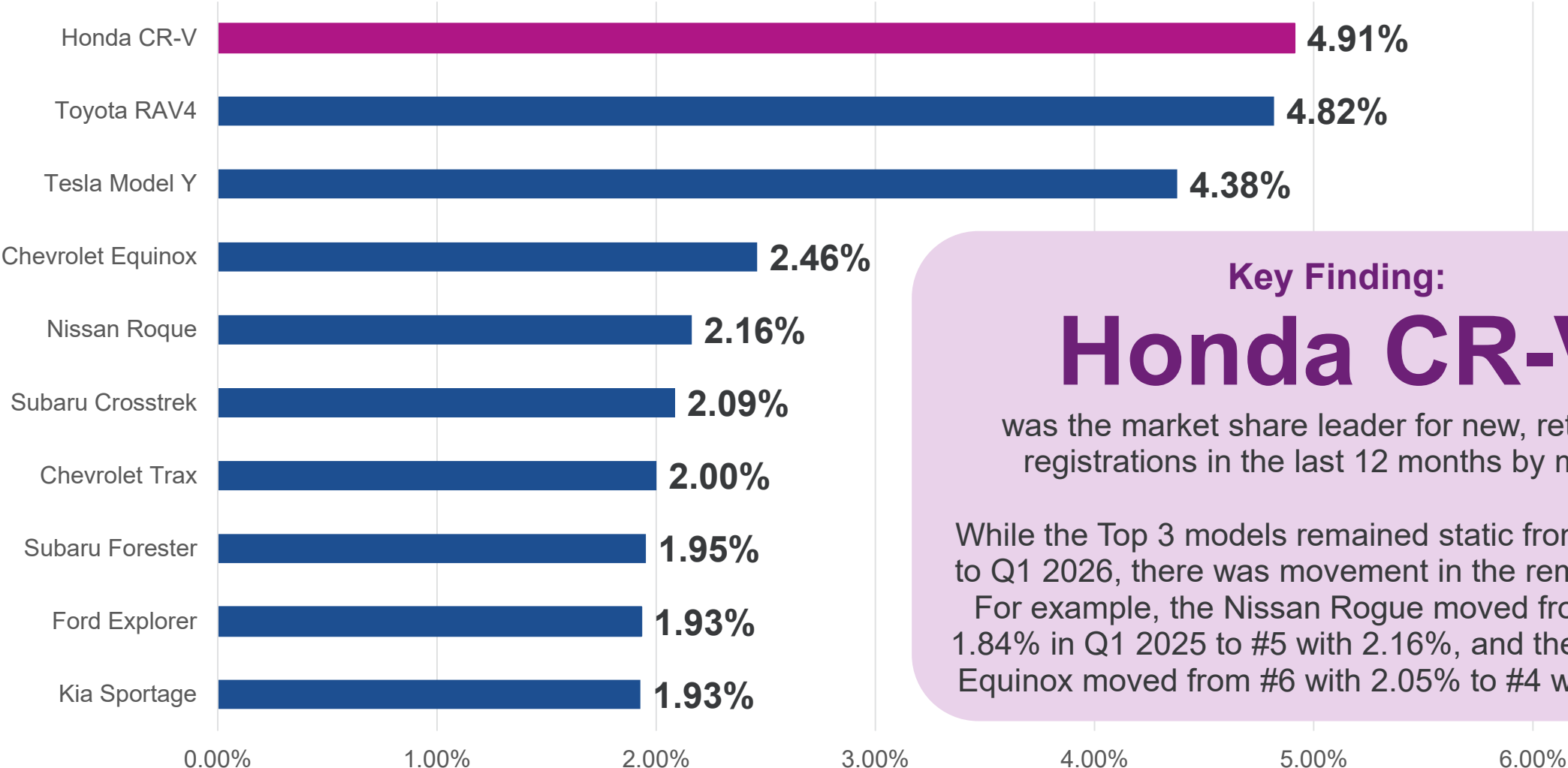
Toyota

was the market share leader for new, retail SUV registrations in the last 12 months by make.

Chevrolet and Honda switched 2nd and 3rd place as compared to Q1 2025. And, Hyundai moved into 5th place, displacing Subaru.

R12M Top 10 New, Retail SUV Registration Market Share %

By vehicle model



Key Finding:
Honda CR-V
was the market share leader for new, retail SUV registrations in the last 12 months by model.

While the Top 3 models remained static from Q1 2025 to Q1 2026, there was movement in the remaining 10. For example, the Nissan Rogue moved from #10 at 1.84% in Q1 2025 to #5 with 2.16%, and the Chevrolet Equinox moved from #6 with 2.05% to #4 with 2.46%.






R12M Top 5 SUV Market Share % Overview by Model

New, retail SUV registrations

SUVs accounted for






63.45%

of new, retail, individual registrations in the last 12 months.

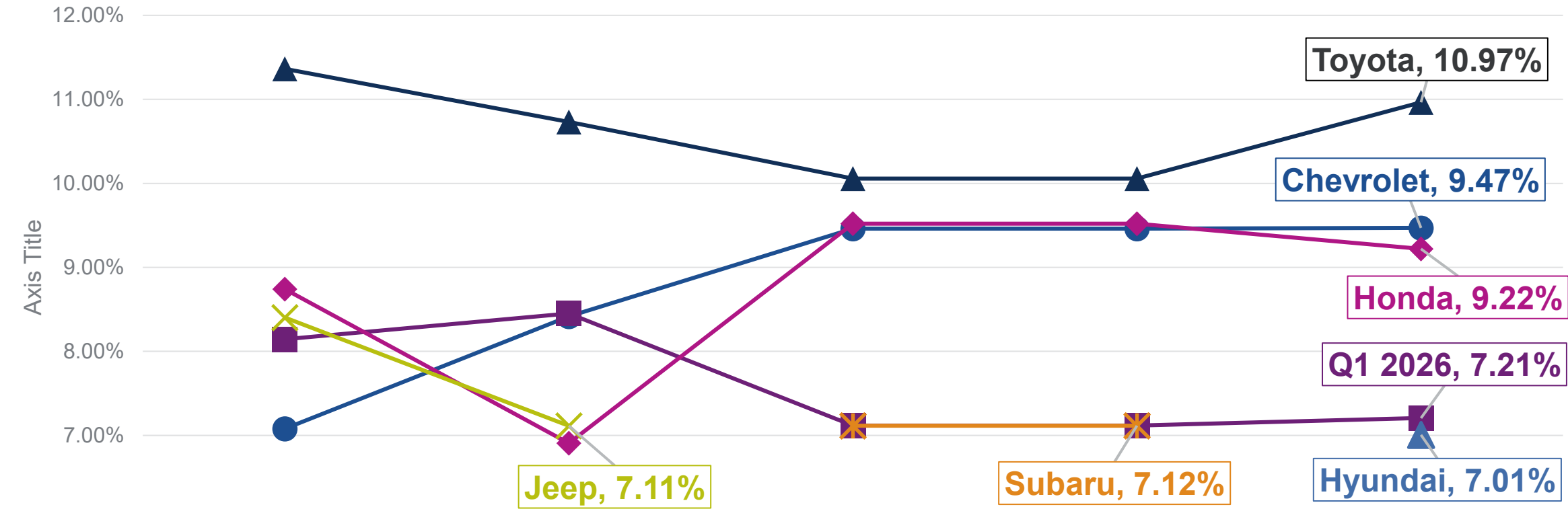
	 Honda CR-V	 Toyota RAV4	 Tesla Model Y	 Chevrolet Equinox	 Nissan Rogue
New, SUV Registration Market Share %	4.91%	4.82%	4.38%	2.46%	2.16%
New, Retail Registration Market Share %	3.12%	3.06%	2.78%	1.56%	1.37%

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	 Toyota RAV4	 Tesla Model Y	 Chevrolet Equinox	 Nissan Rogue
Top 5 In-brand model Inflows	Including Honda Models	Including Toyota Models	Including Tesla Models	Including Chevrolet Models	Including Nissan Models
	Honda CR-V 42.78%	Toyota RAV4 33.38%	Tesla Model Y 27.22%	Chevrolet Equinox 41.68%	Nissan Rogue 39.59%
	Honda Accord 7.73%	Toyota Camry 8.12%	Tesla Model 3 17.92%	Chevrolet TrailBlazer 4.29%	Nissan Altima 6.45%
	Honda Civic 4.63%	Toyota Corolla 5.44%	Tesla Model X 1.25%	Chevrolet Blazer 4.25%	Nissan Sentra 3.68%
	Honda Pilot 4.16%	Toyota Highlander 4.98%	Tesla Model S 0.96%	Chevrolet Trax 4.18%	Nissan Rogue Sport 3.67%
	Honda HR-V 3.78%	Toyota Corolla Cross 2.54%	Tesla Cybertruck 0.11%	Chevrolet Traverse 4.18%	Nissan Kicks 3.45%
Top 5 Inflows from all makes	All Models	All Models	All Models	All Models	All Models
	Honda CR-V 42.78%	Toyota RAV4 33.38%	Tesla Model Y 27.22%	Chevrolet Equinox 41.68%	Nissan Rogue 39.59%
	Honda Accord 7.73%	Toyota Camry 8.12%	Tesla Model 3 17.92%	Chevrolet TrailBlazer 4.29%	Nissan Altima 6.45%
	Honda Civic 4.63%	Toyota Corolla 5.44%	Honda CR-V 2.01%	Chevrolet Blazer 4.25%	Nissan Sentra 3.68%
	Honda Pilot 4.16%	Toyota Highlander 4.98%	Toyota RAV4 1.87%	Chevrolet Trax 4.18%	Nissan Rogue Sport 3.67%
	Honda HR-V 3.78%	Honda CR-V 3.09%	Honda Accord 1.66%	Chevrolet Traverse 4.18%	Nissan Kicks 3.45%

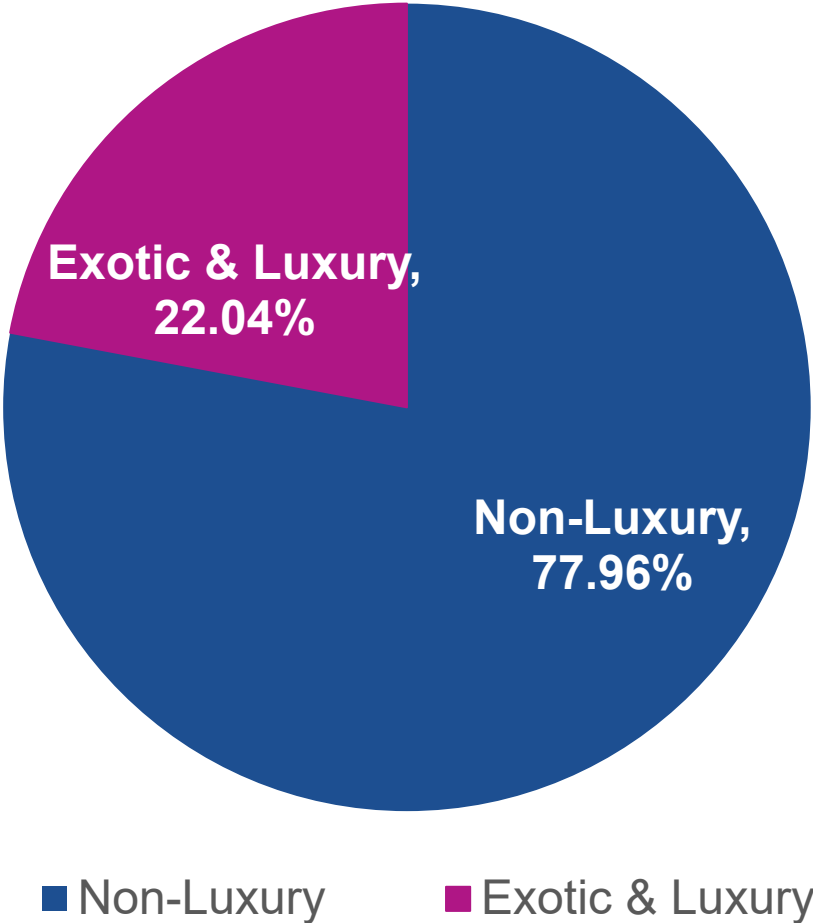
Top 5 New, Retail, SUV Registration MS % by Make for the Last 5 Years



	Q1 2022	Q1 2023	Q1 2024	Q1 2025	Q1 2026
● Chevrolet	7.08%	8.42%	9.46%	9.46%	9.47%
■ Ford	8.15%	8.45%	7.12%	7.12%	7.21%
◆ Honda	8.74%	6.91%	9.52%	9.52%	9.22%
▲ Hyundai					7.01%
✕ Jeep	8.40%	7.11%			
✕ Subaru			7.12%	7.12%	
▲ Toyota	11.36%	10.73%	10.06%	10.06%	10.97%

R12M New, Retail SUV Registration Market Share %

By vehicle class: non-luxury, luxury and exotic vehicles



Key Findings:

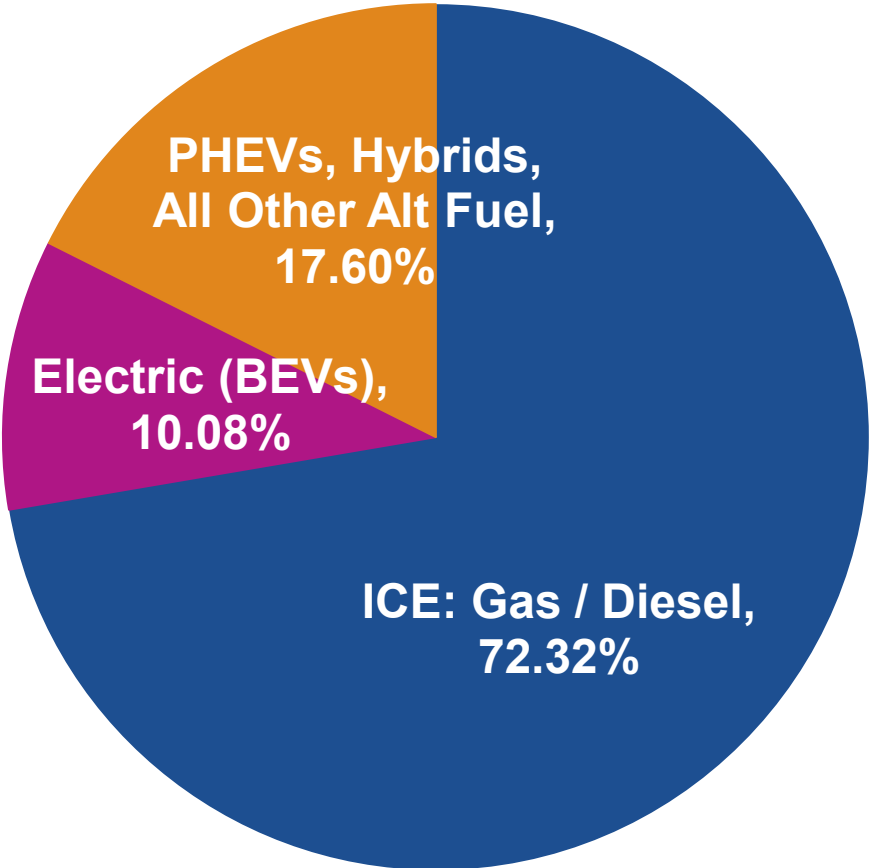
Non-Luxury SUVs accounted for **77.96%** of new, retail SUV registrations in the last 12 Months

Luxury SUVs accounted for **21.97%**

Exotic SUVs accounted for **0.06%**

R12M New, Retail SUV Registration Market Share %

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



■ ICE: Gas / Diesel
■ Electric (BEVs)

Key Findings:

ICE: Gas/Diesel SUVs accounted for
73.32%
of new, retail SUV registrations in the last 12 months

Electric SUVs (BEVs) accounted for
10.08%

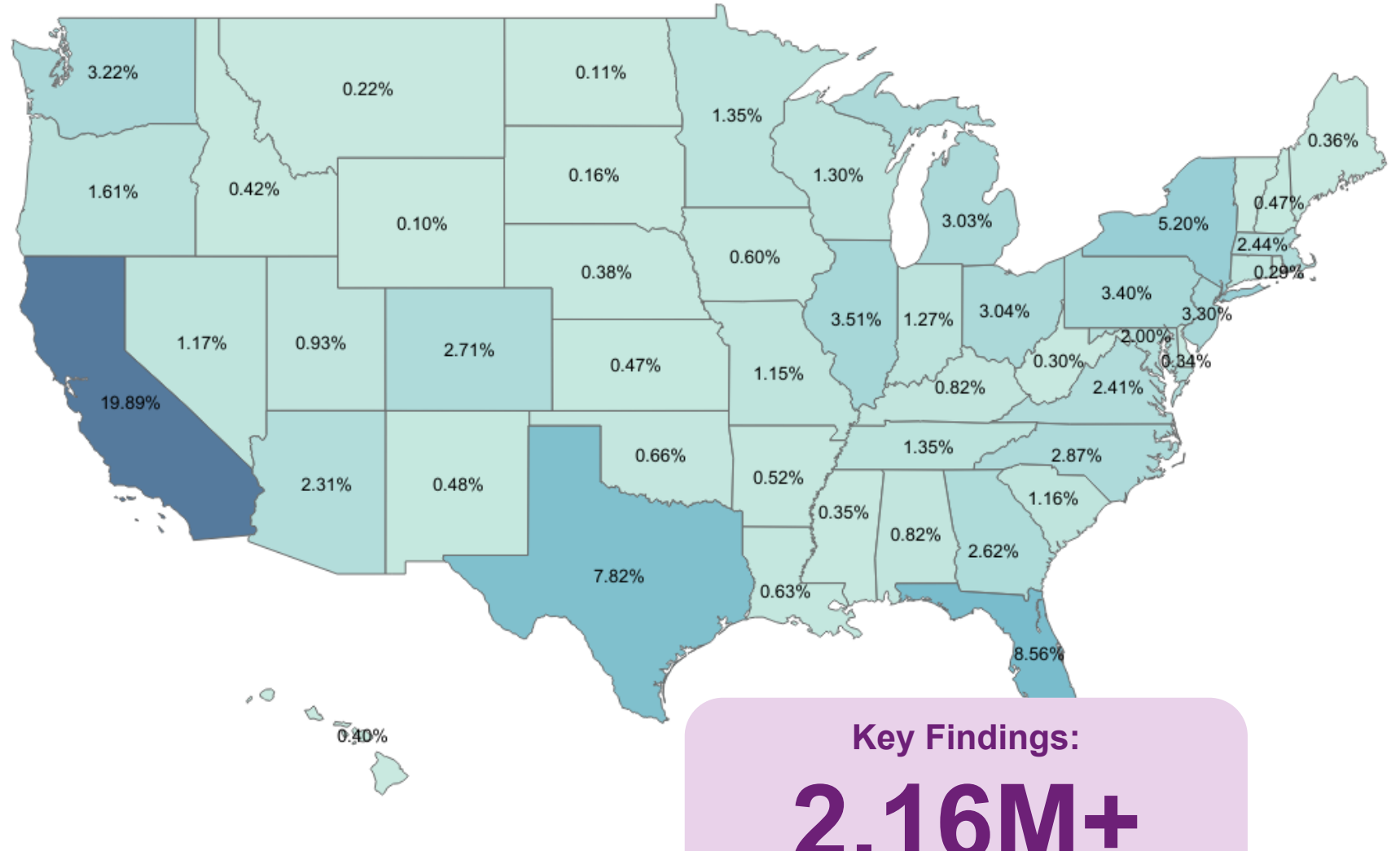
PHEVs, Hybrids, other alternative fuel SUVs
accounted for
17.60%

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

Key Findings:

27.68%

of new, retail SUV registrations in the last 12 months were for electrified SUVs (Electrified is including, BEVs, PHEVs, Hybrids and other Alt Fuel vehicles).



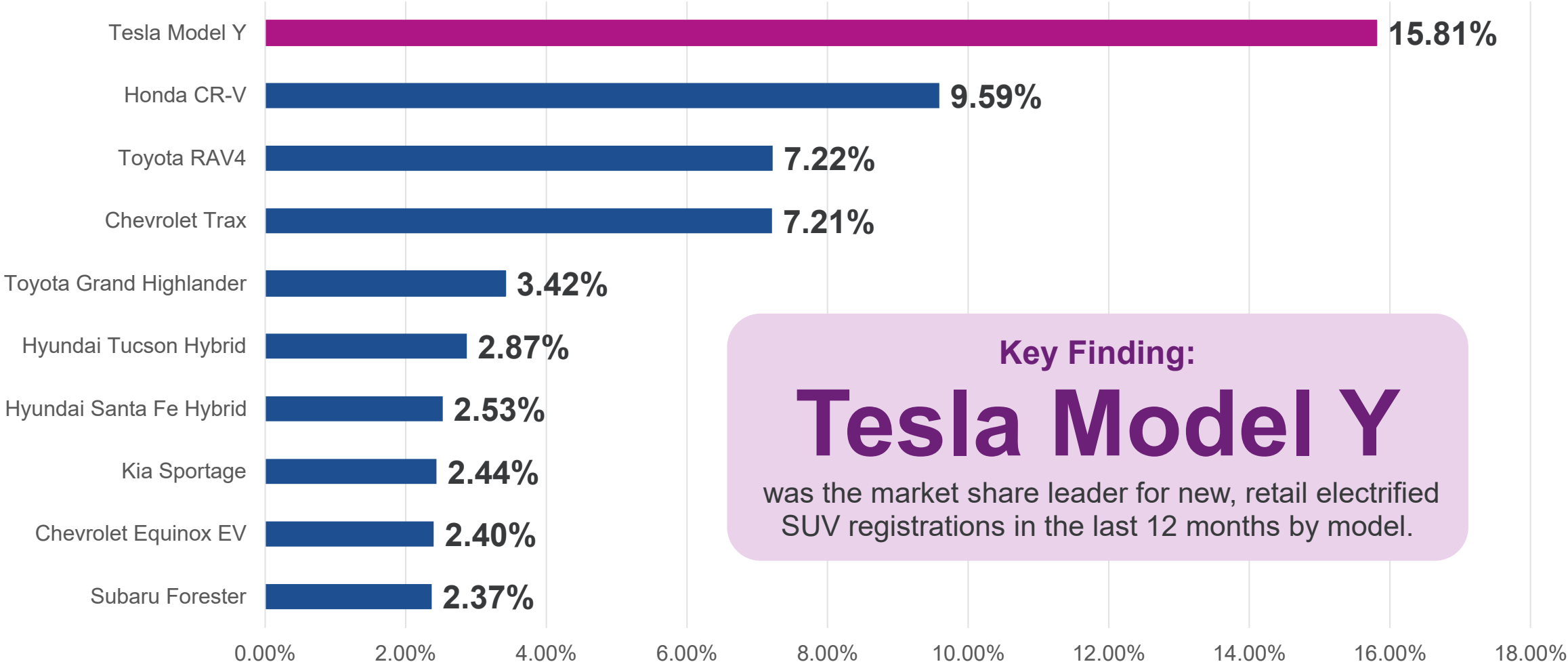
Key Findings:

2.16M+

new, retail electrified SUVs were registered in the last 12 months.

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

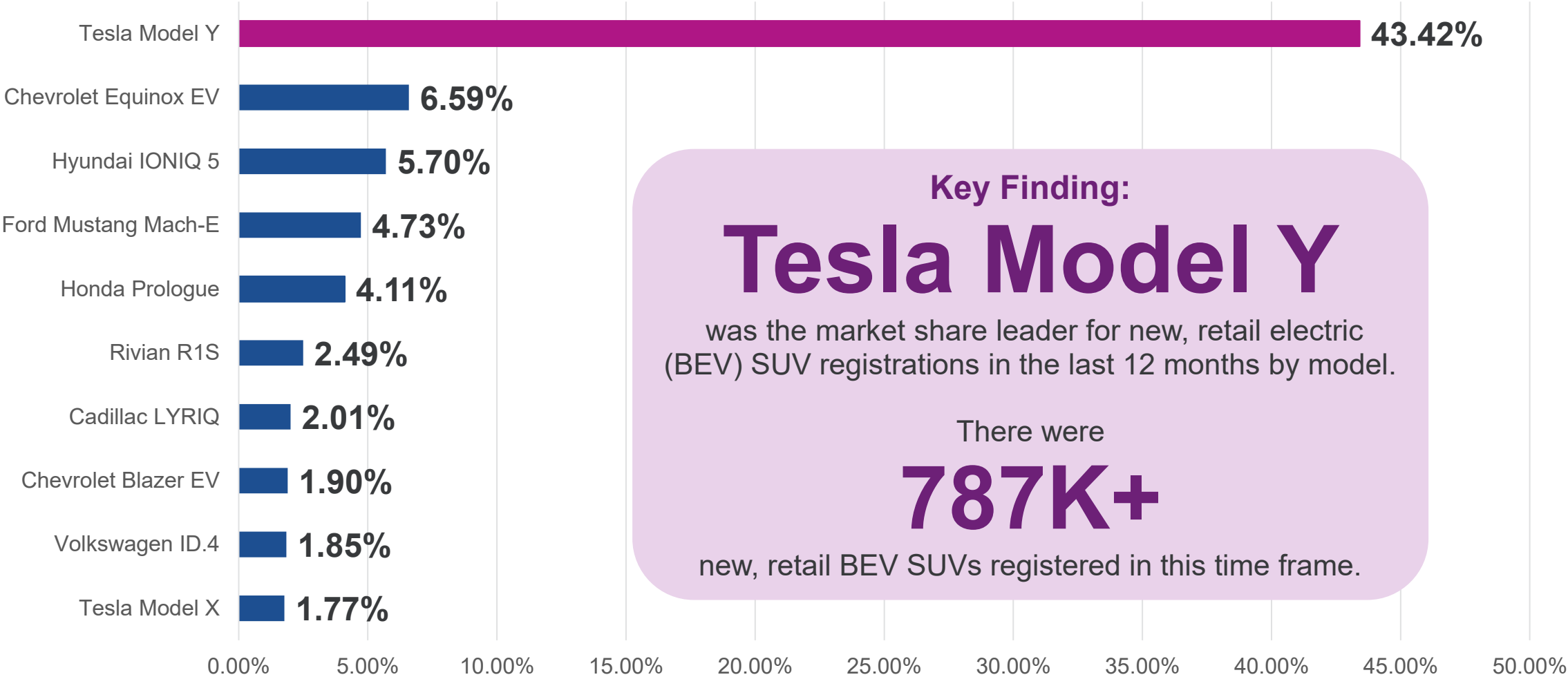
By fuel type (BEV, PHEV, Hybrid and Other Alt Fuel) and vehicle model



Key Finding:
Tesla Model Y
was the market share leader for new, retail electrified SUV registrations in the last 12 months by model.

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

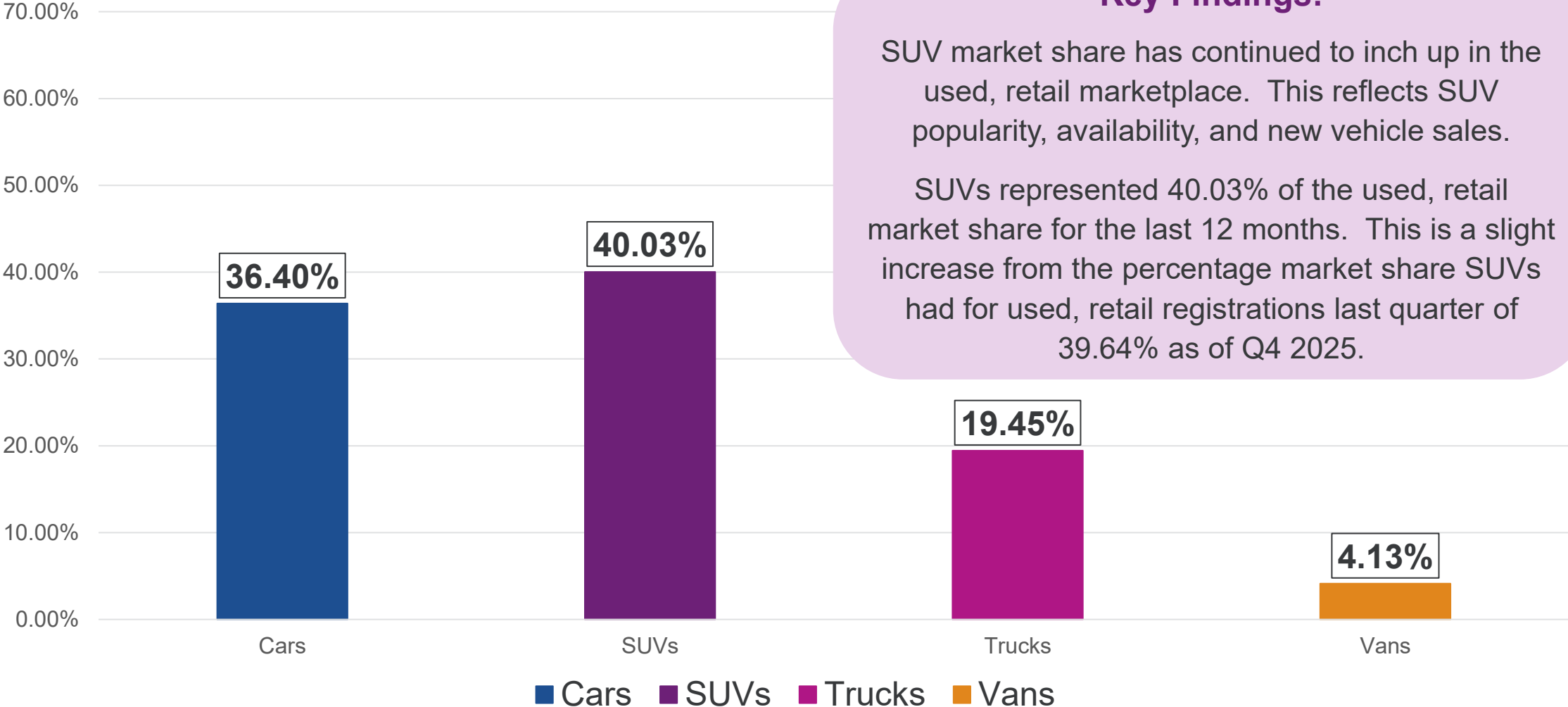
By fuel type (**BEVs ONLY**) and vehicle model



Key Finding:
Tesla Model Y
was the market share leader for new, retail electric (BEV) SUV registrations in the last 12 months by model.
There were **787K+** new, retail BEV SUVs registered in this time frame.

R12M Used, Retail Registrations Market Share %

By vehicle segment

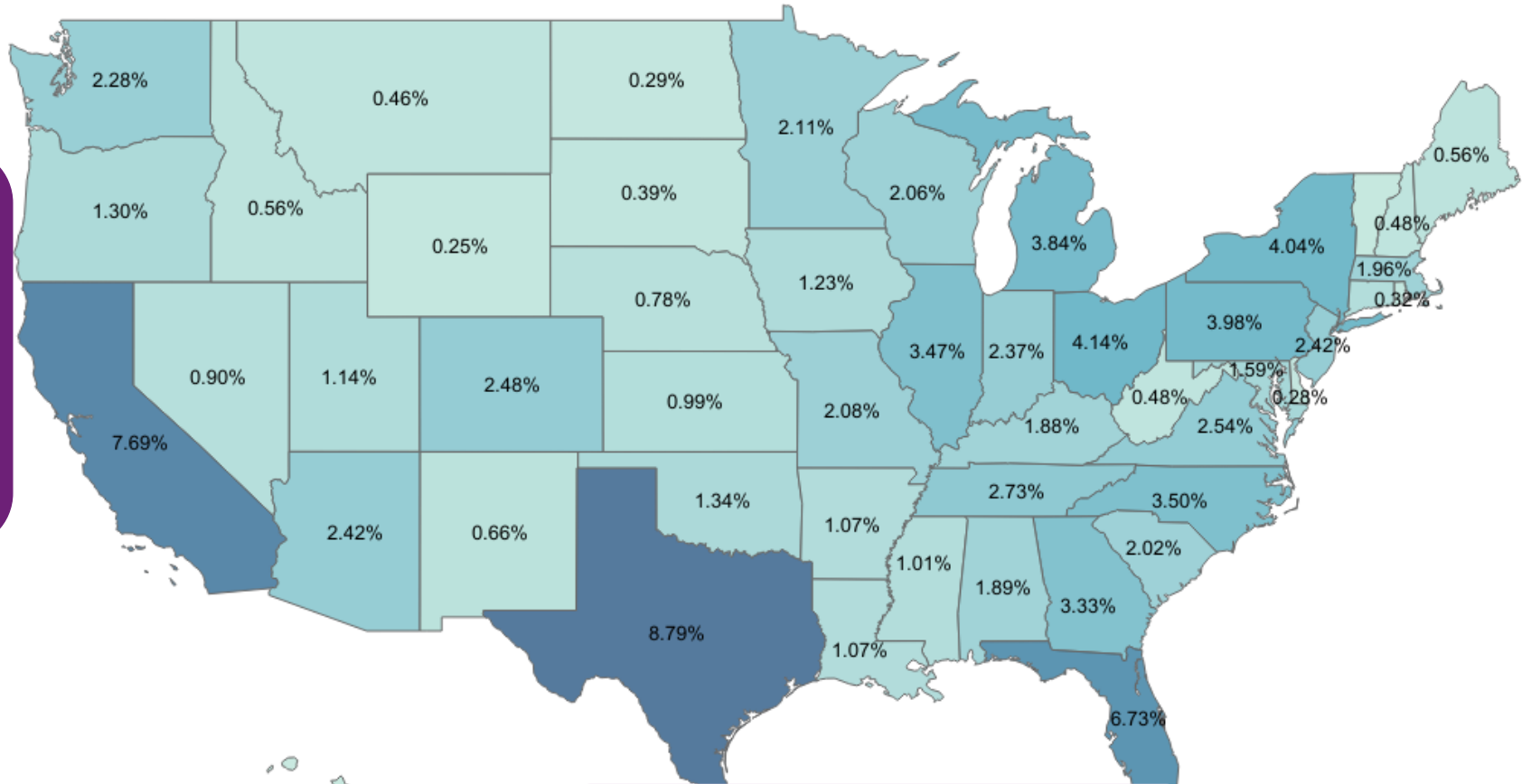


R12M U.S. Used, Retail SUV Registration % by State

Key Findings:

14.41M+

used, retail SUVs were registered in the last 12 months.



Key Findings:

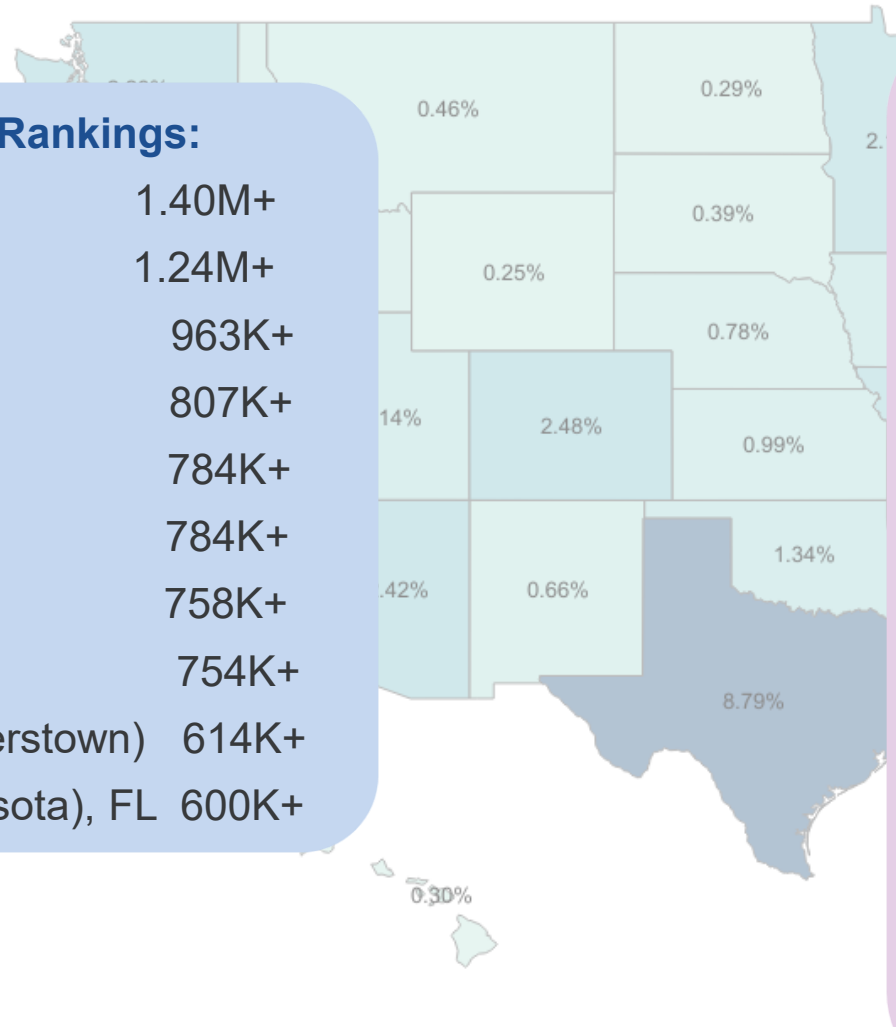
40.03%

of used, retail registrations were for SUVs.

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

Used, Retail DMA Rankings:

- | | | |
|-----|-------------------------------|--------|
| 1. | Los Angeles, CA | 1.40M+ |
| 2. | New York, NY | 1.24M+ |
| 3. | Dallas-Ft Worth, TX | 963K+ |
| 4. | Atlanta, GA | 807K+ |
| 5. | Chicago, IL | 784K+ |
| 6. | Houston, TX | 784K+ |
| 7. | Philadelphia, PA | 758K+ |
| 8. | Phoenix (Prescott), AZ | 754K+ |
| 9. | Washington, DC (Hagerstown) | 614K+ |
| 10. | Tampa–St. Pete (Sarasota), FL | 600K+ |



Used, Retail, SUV DMA Rankings:

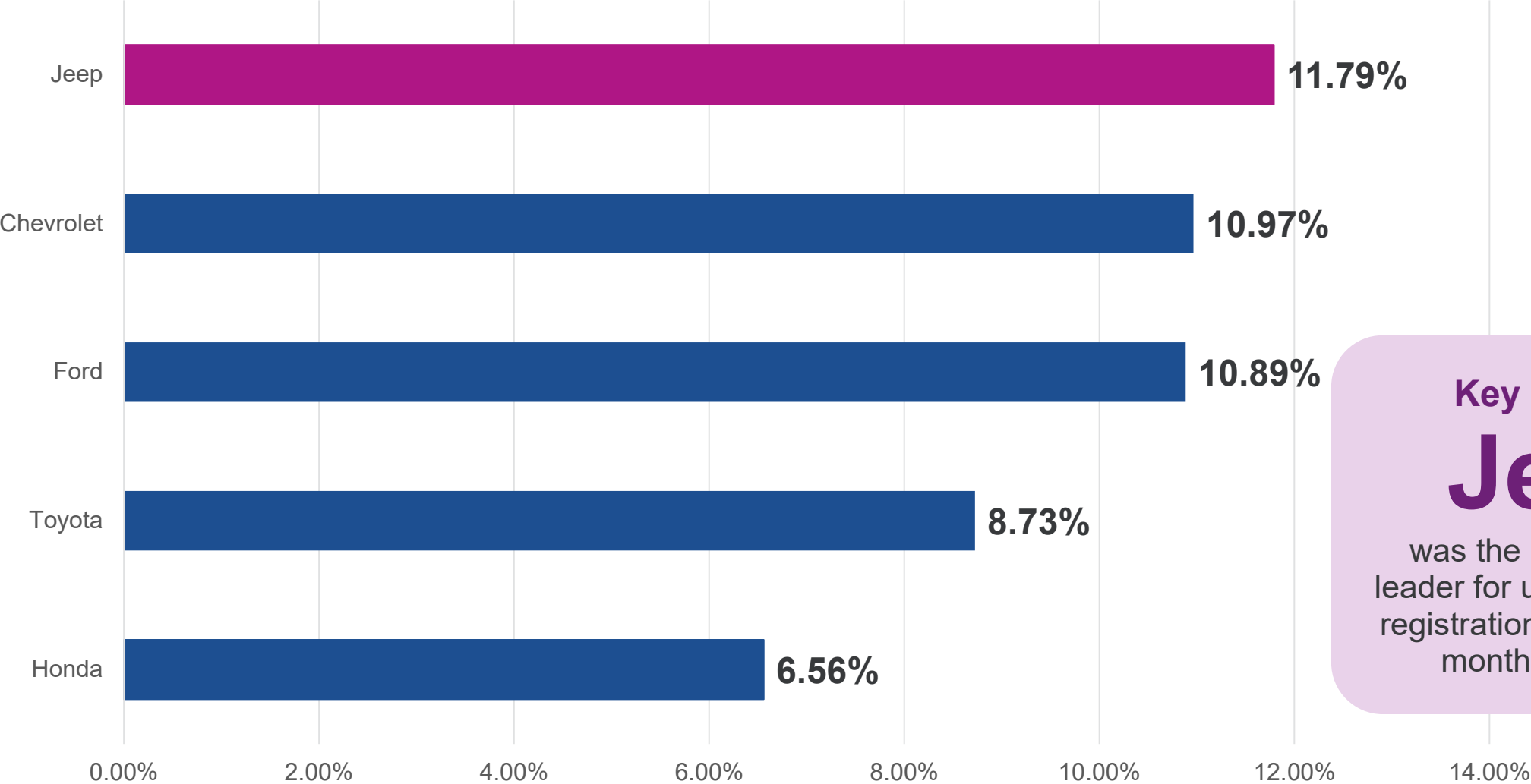
- | | | | |
|-----|-------------------------|-------|---|
| 1. | New York, NY | 580K+ | ↑ |
| 2. | Los Angeles, CA | 479K+ | ↓ |
| 3. | Dallas-Ft Worth, TX | 368K+ | ▬ |
| 4. | Chicago, IL | 357K+ | ↑ |
| 5. | Philadelphia, PA | 333K+ | ↑ |
| 6. | Atlanta, GA | 317K+ | ↓ |
| 7. | Houston, TX | 301K+ | ↓ |
| 8. | Denver, CO | 282K+ | ↑ |
| 9. | Phoenix (Prescott), AZ | 275K+ | ↓ |
| 10. | Boston (Manchester), MA | 273K+ | ↑ |

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

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

R12 Top 5 Used, Retail SUV Registration Market Share %

By vehicle make

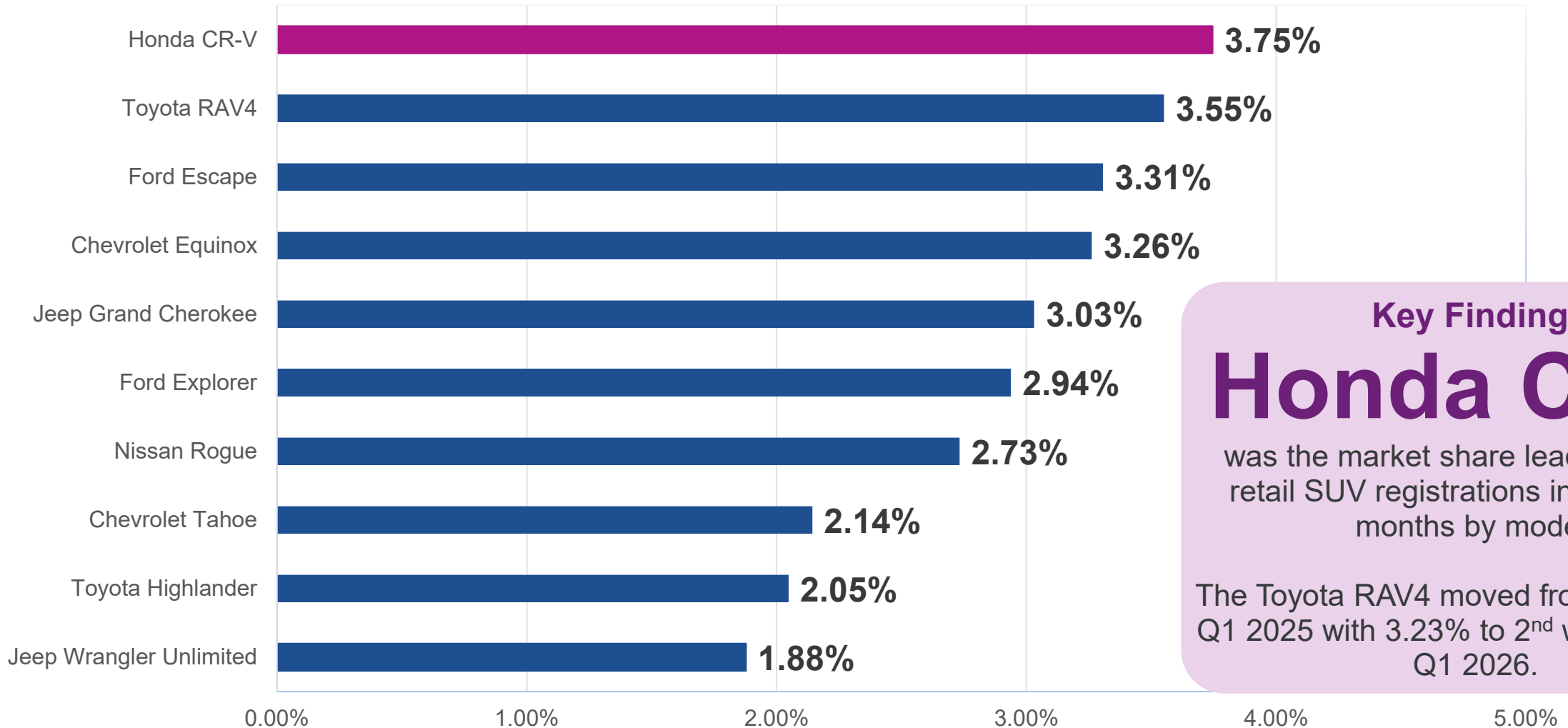


Key Finding:
Jeep
was the market share leader for used, retail SUV registrations in the last 12 months by make.



R12M Top 10 Used, Retail SUV Registration Market Share %

By Vehicle Model



Key Finding:

Honda CR-V

was the market share leader for used, retail SUV registrations in the last 12 months by model.

The Toyota RAV4 moved from 5th place in Q1 2025 with 3.23% to 2nd with 3.55% for Q1 2026.

Q1 Summary Insights

What are they Driving



SUVs represented **63.45%** of new, retail registrations in the last 12 months.

Of the SUVs registered, **77.96%** were **non-luxury**, **21.97%** were **luxury**, and **0.06%** were **exotic** SUV models.



Toyota had the largest market share for new, retail SUV registrations by make with **10.97%**.

The **Honda CR-V** was the **top model** by market share with **4.91%**, followed closely by the **Toyota RAV4** with **4.82%**.



The **Tesla Model Y** was the market share leader for **electrified**, new, retail SUV registrations with **15.81%** by model.

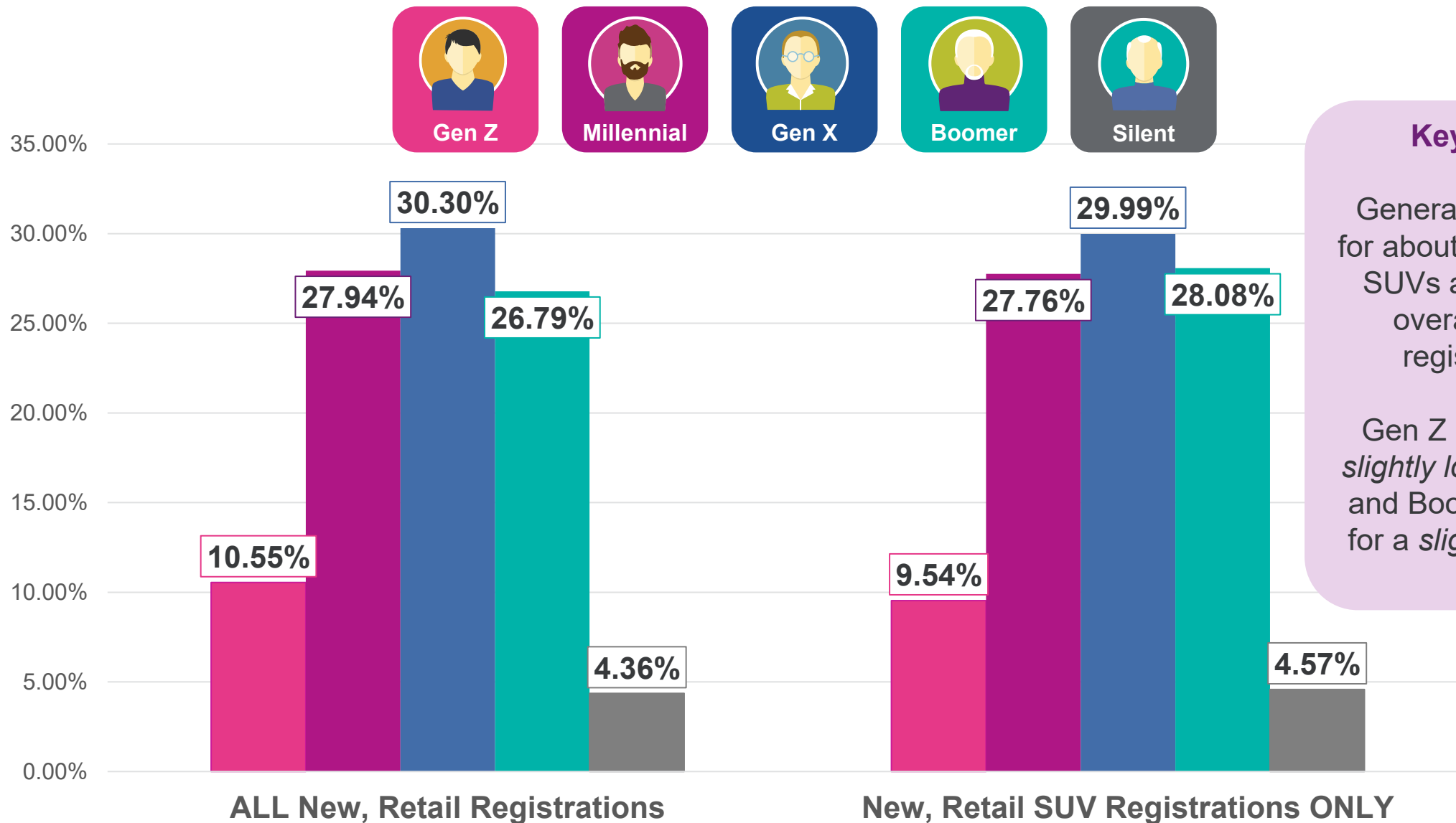
The **Honda CRV** was the leader for **used**, retail SUV registrations with **3.75%** market share by model.

Q1 2026 Who are these buyers?

- Demographic information
- Generational insights
- Lifestyle segmentation



R12M New, Retail Registration % by Generation



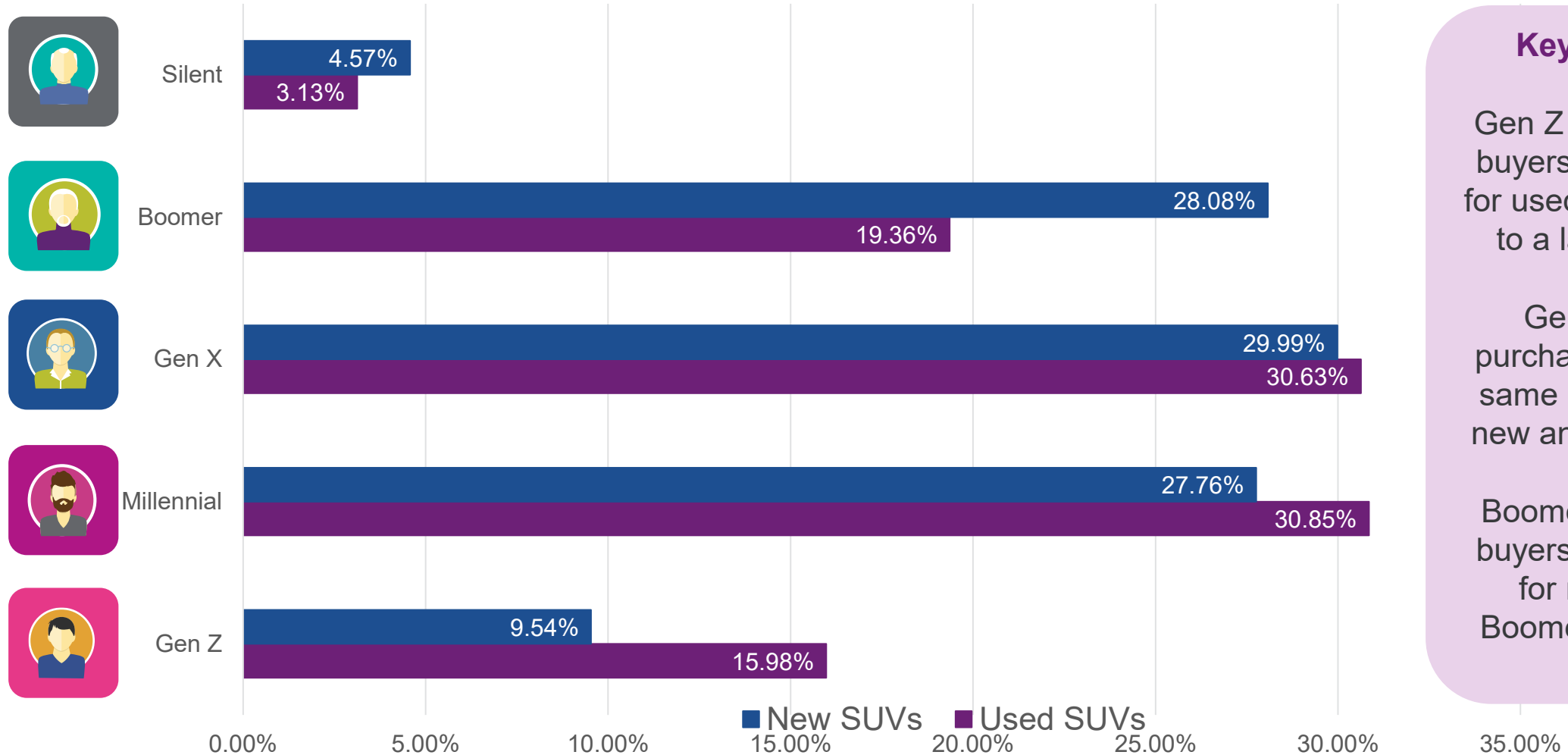
Key Findings:

Generations registered for about the same %'s of SUVs as compared to overall new, retail registration %'s.

Gen Z registered for a *slightly lower* % of SUVs, and Boomers registered for a *slightly higher* % of SUVs.

R12M Retail SUV Registration Market Share %

By generation and sold as type



Key Findings:

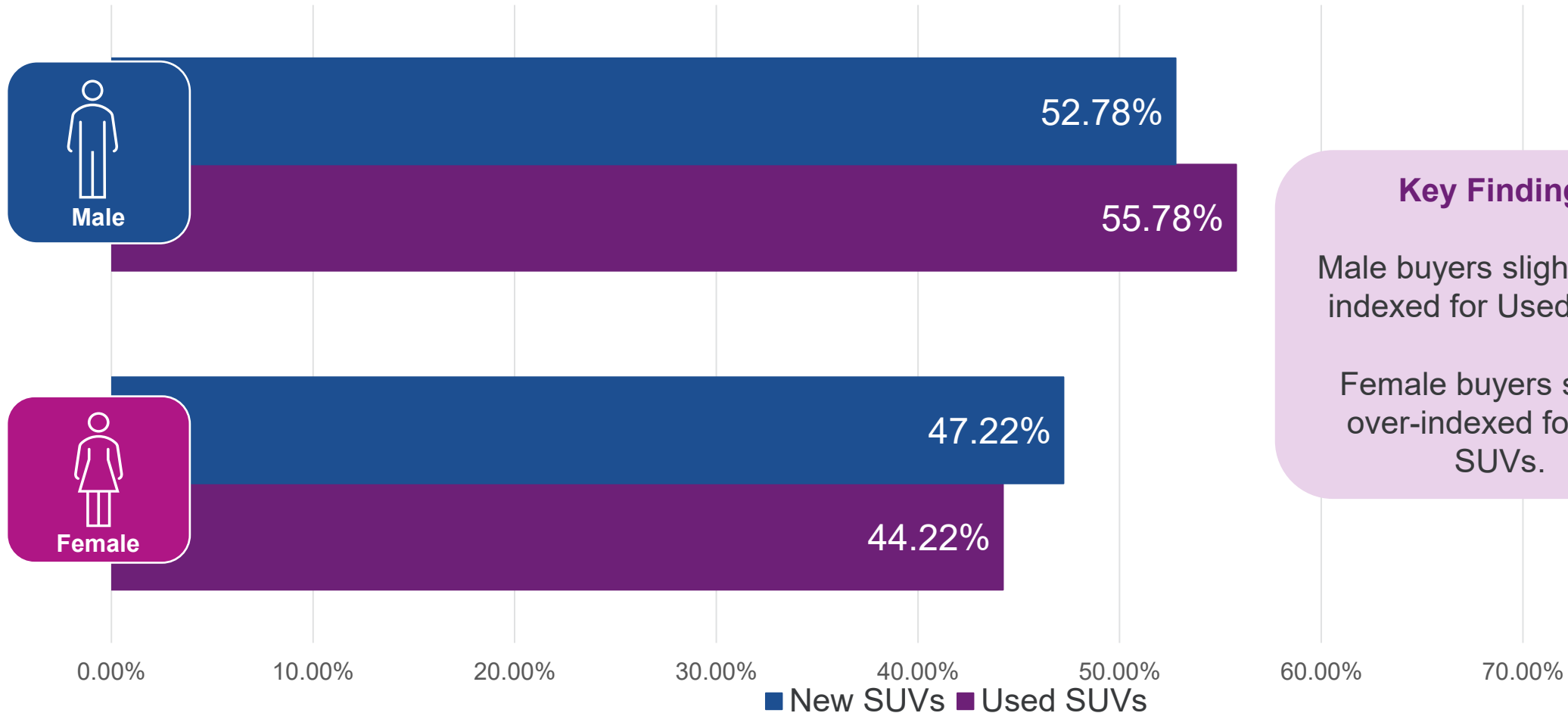
Gen Z and Millennial buyers over-indexed for used SUVs, Gen Z to a larger extent.

Gen X buyers purchased about the same percentage of new and used SUVs.

Boomers and Silent buyers over-indexed for new SUVs, Boomers to a larger extent.

R12M Retail SUV Registration Market Share %

By gender and sold as type



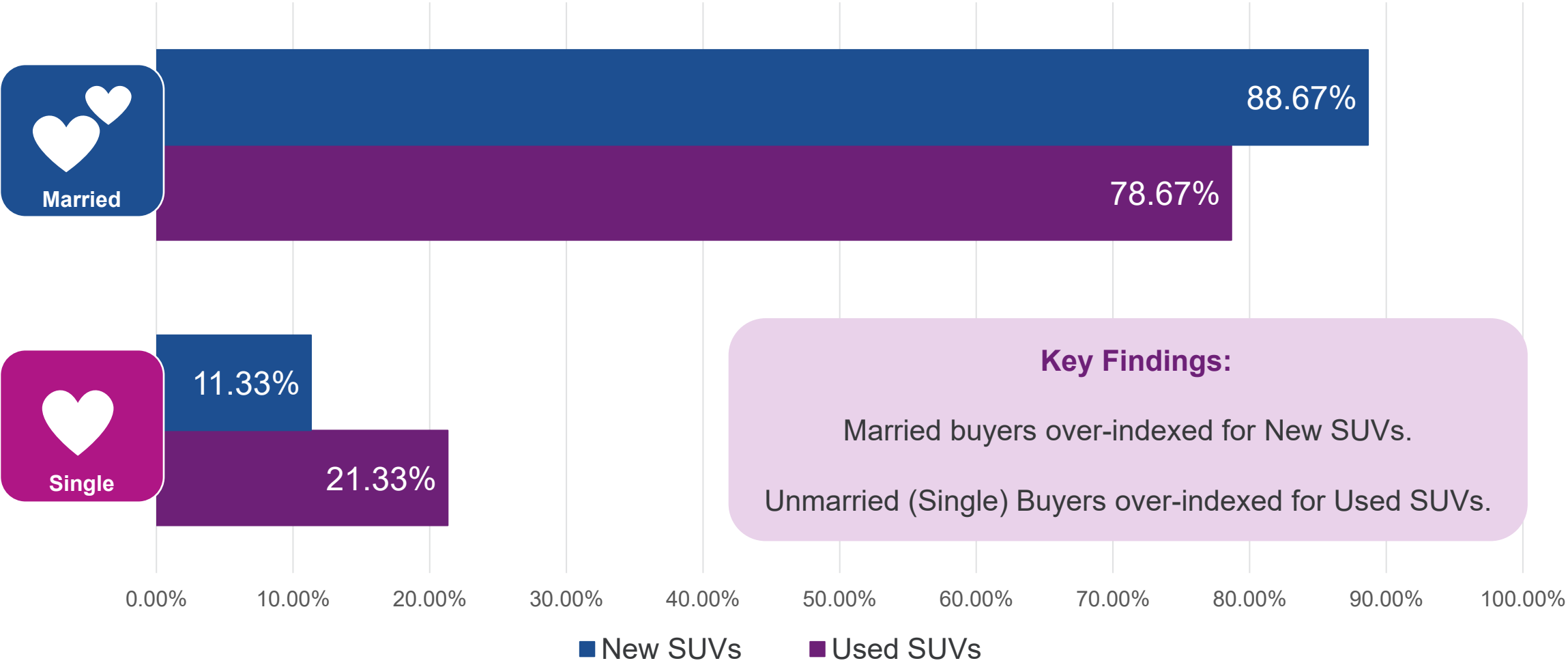
Key Findings:

Male buyers slightly over-indexed for Used SUVs.

Female buyers slightly over-indexed for New SUVs.

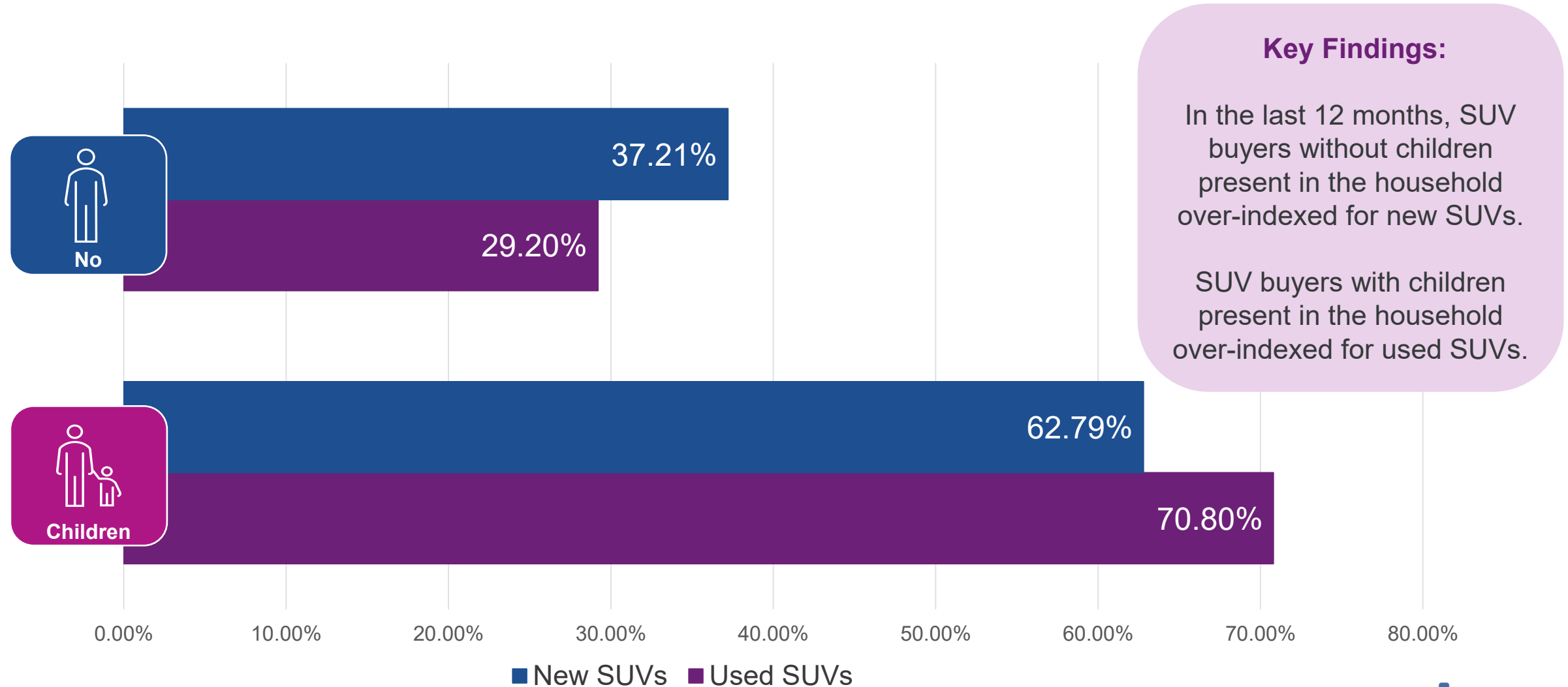
R12M New, Retail SUV Registration Market Share %

By marital status and sold as type



R12M Retail SUV Registration Market Share %

By presence of children and sold as type



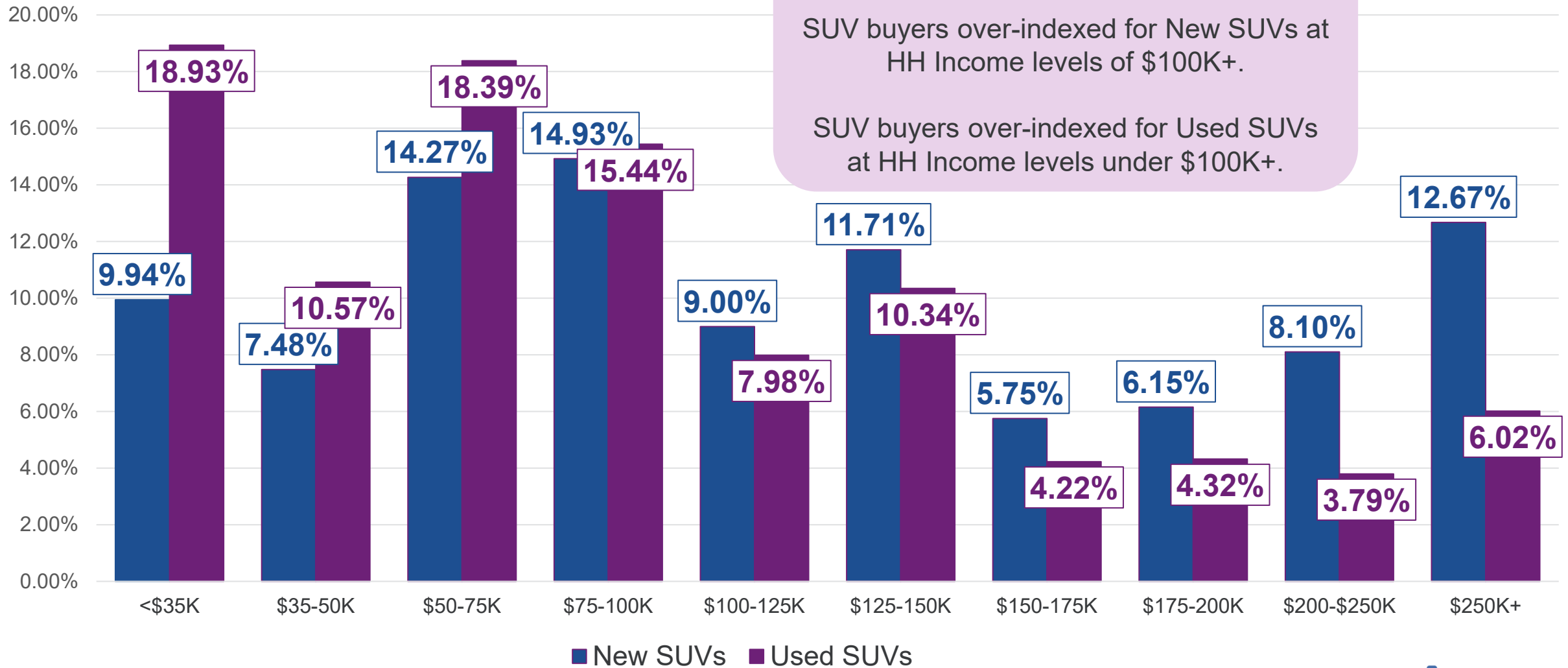
Key Findings:

In the last 12 months, SUV buyers without children present in the household over-indexed for new SUVs.

SUV buyers with children present in the household over-indexed for used SUVs.

R12M Retail SUV Registration Market Share %

By household (HH) income and sold as type



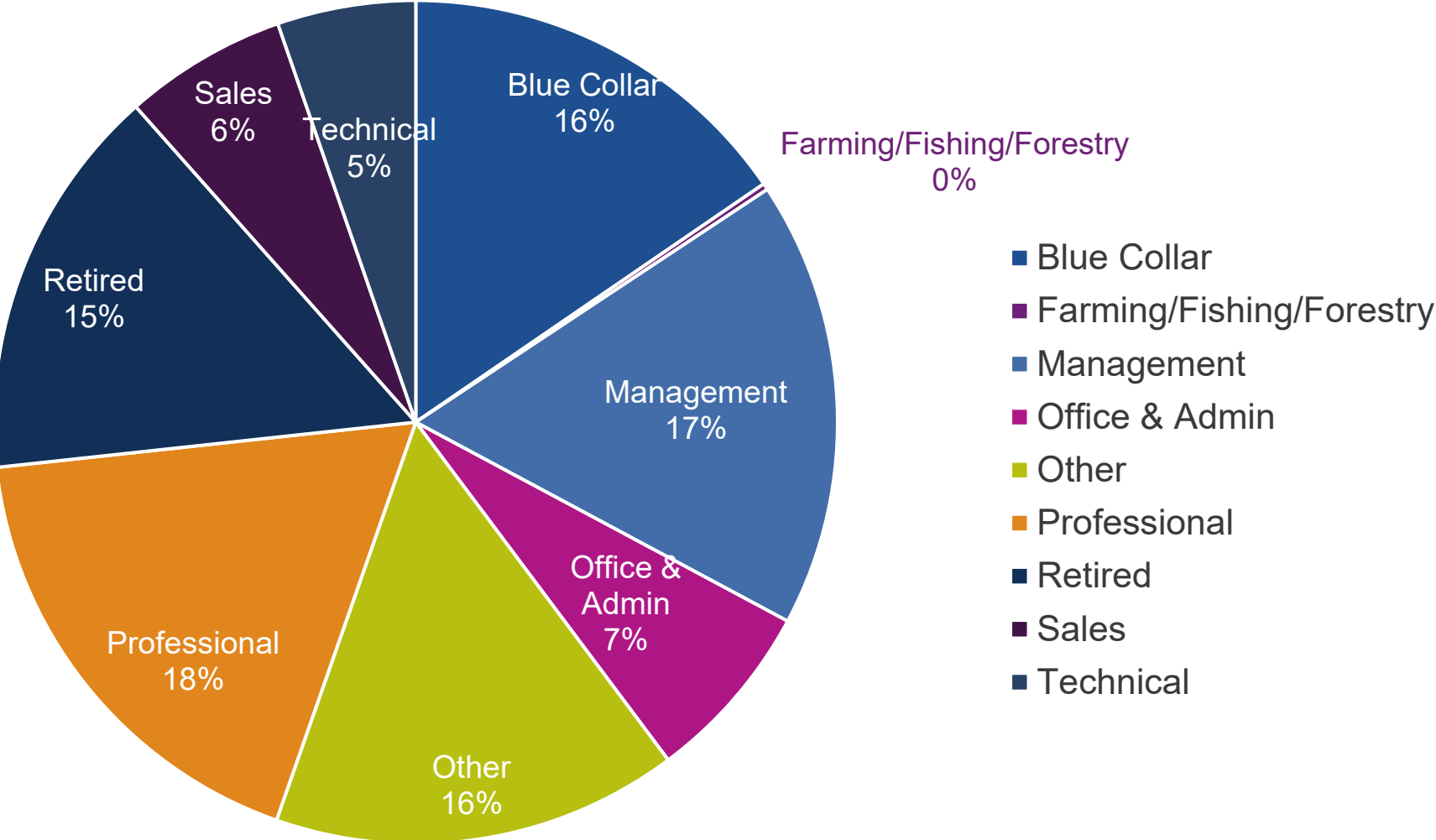
Key Findings:

SUV buyers over-indexed for New SUVs at HH Income levels of \$100K+.

SUV buyers over-indexed for Used SUVs at HH Income levels under \$100K+.

R12M New Retail SUV Registration Market Share %

By buyer occupation sold as type

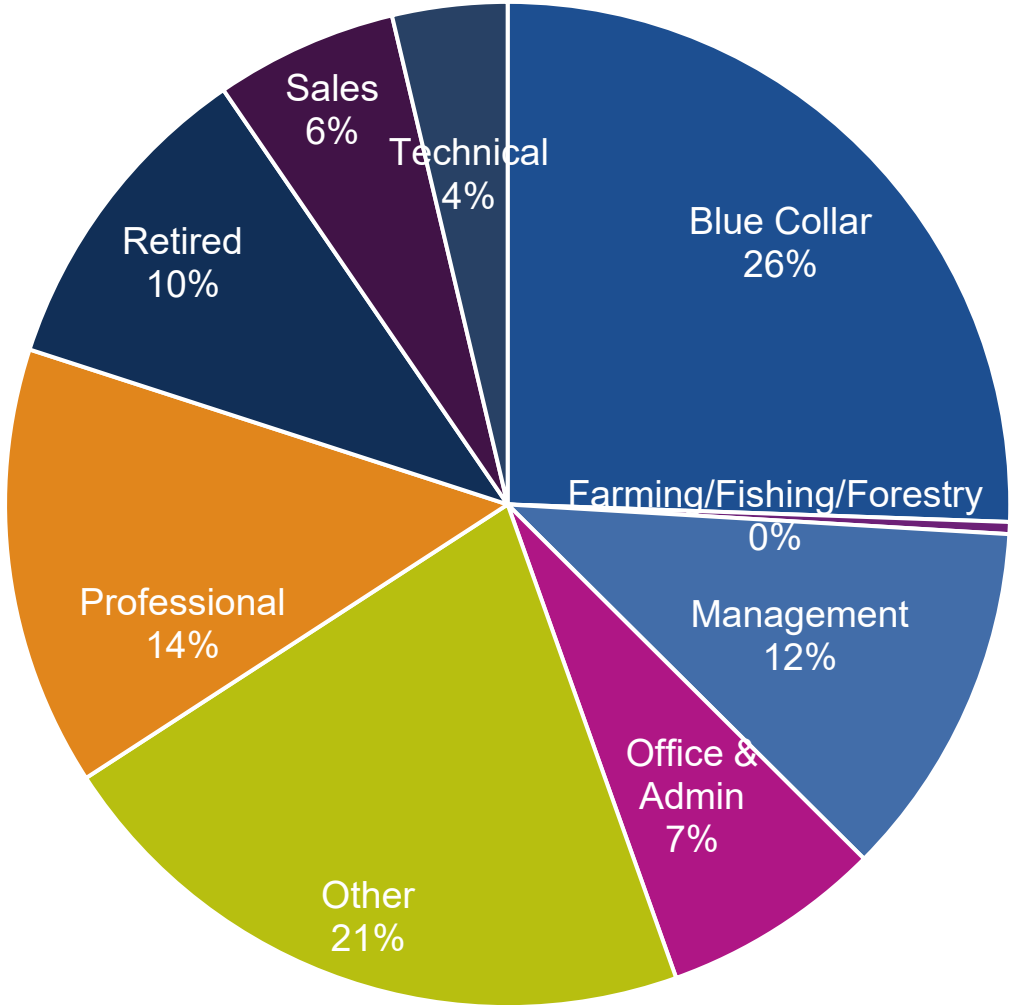


Key Findings:

Professional was the highest buyer occupation market share percentage for new, retail SUV buyers in the last 12 months.

R12M Used Retail SUV Registration Market Share %

By buyer occupation sold as type



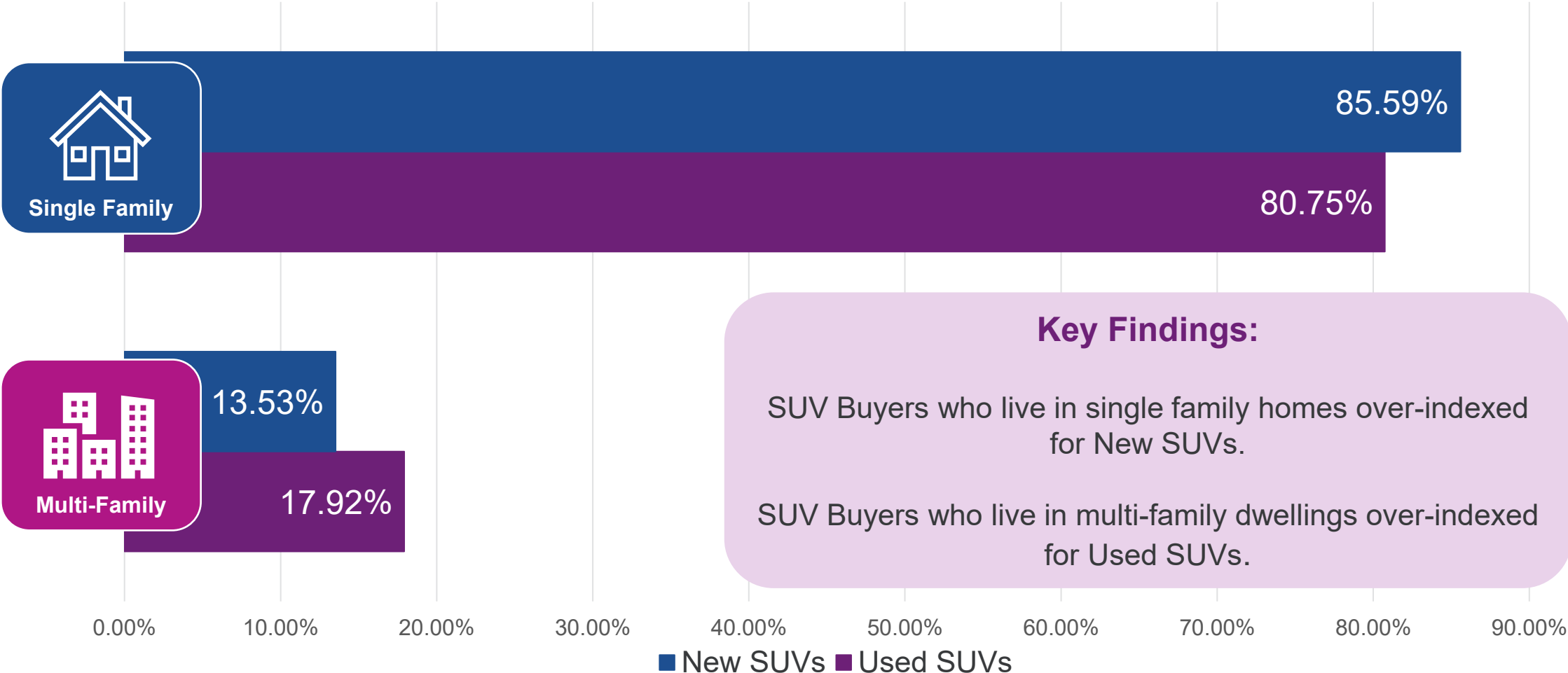
- Blue Collar
- Farming/Fishing/Forestry
- Management
- Office & Admin
- Other
- Professional
- Retired
- Sales
- Technical

Key Findings:

Blue Collar was the highest buyer occupation market share percentage for used, retail SUV buyers in the last 12 months.

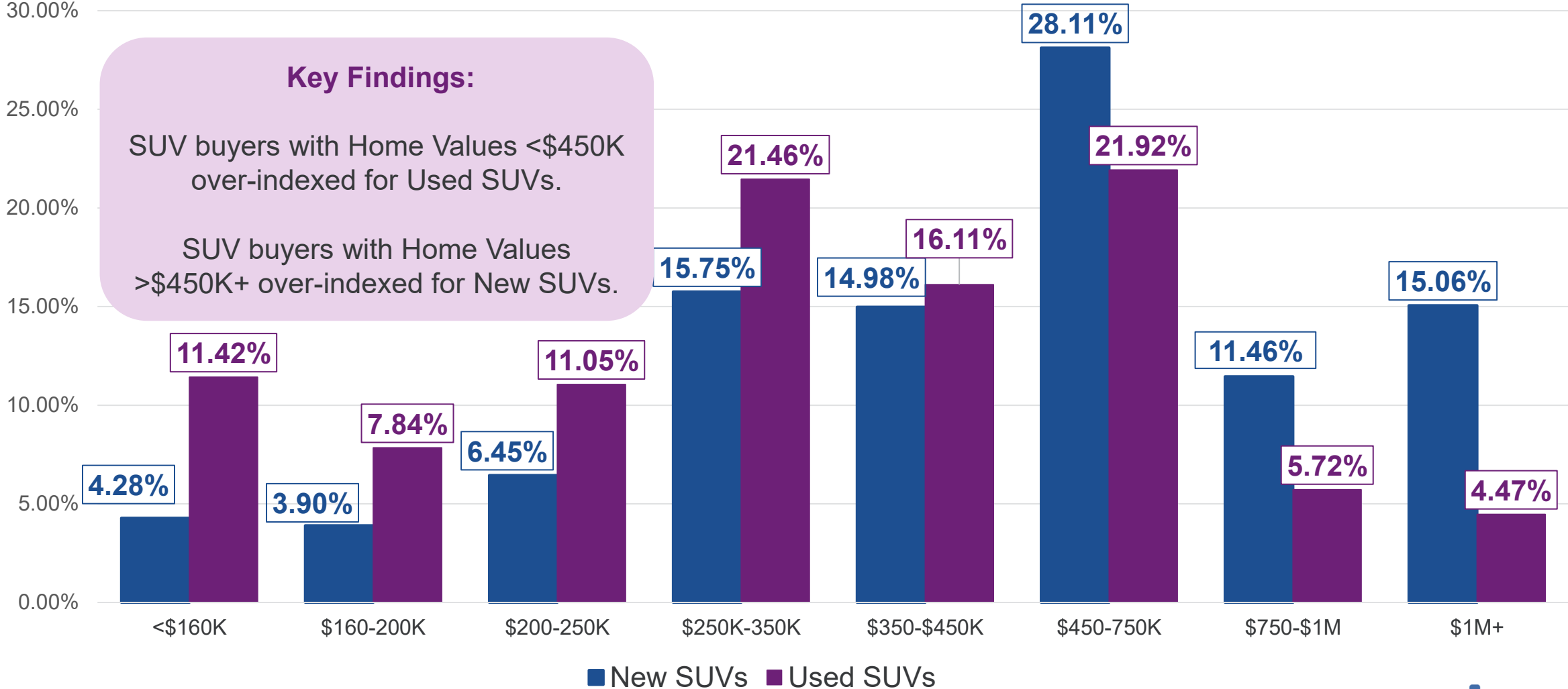
R12M Retail SUV Registration Market Share %

By dwelling type and sold as type



R12M New, Retail SUV Registration Market Share %

By home value and sold as type



Q1 Demographic Summary Insights



Consumer demographic indexing varies between new and used retail SUV buyers in the last 12 months.



Targeting specific consumers for your marketing campaigns is critical for success.



Lifestyle segmentation can help you create precision marketing campaigns for additional marketing success.



Q1 2026 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

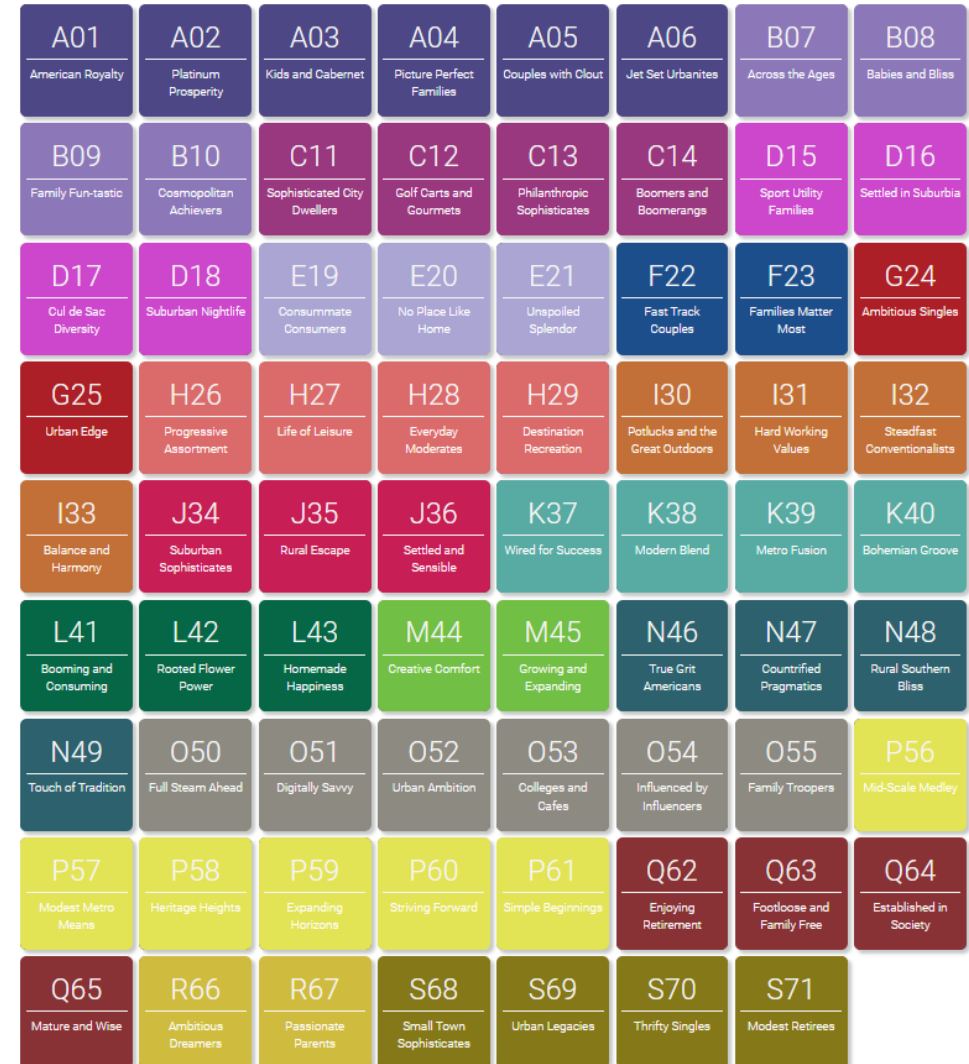
Experian Mosaic divides the marketable U.S. population into **19** Groups and **71** more detailed Types.

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

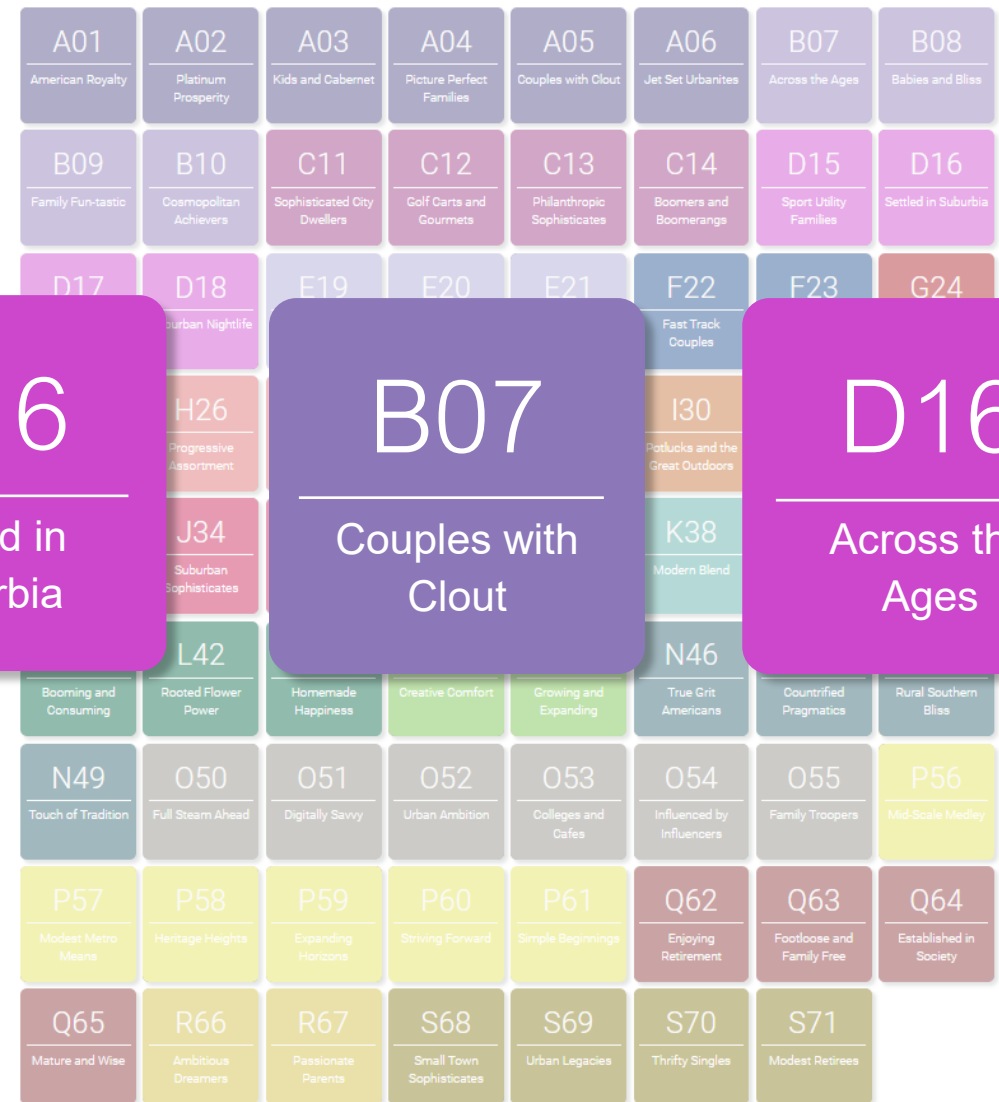
C13
Philanthropic Sophisticates

A01
American Royalty

D16
Settled in Suburbia

B07
Couples with Clout

D16
Across the Ages



Top 3 Lifestyle Segments for New Retail SUV Buyers



**C13:
Philanthropic
Sophisticates**



**A01:
American
Royalty**



**D16:
Settled in
Suburbia**

U.S. Population	11.3M	7.8M	6.4M
% Households	4.09%	2.26%	1.83%
% Individuals	4.92%	3.34%	2.78%

Overview

Mature, upscale couples in suburban homes

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

Upper middle-class family units living comfortably in established suburbs

Top 3 Lifestyle Segments for New Retail Car Buyers



**C13:
Philanthropic
Sophisticates**



**A01:
American
Royalty**



**D16:
Settled in
Suburbia**

General Insights

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

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

- Comfortable lifestyles
- Young children
- Large households
- Do-it-yourselfers

Technology Adoption



Apprentices



Journeyman



Apprentices

Top 3 Lifestyle Segments for New Retail Car Buyers



**C13:
Philanthropic
Sophisticates**



**A01:
American
Royalty**



**D16:
Settled in
Suburbia**







Top Buying Style

Brand
loyalists

Quality
matters

Brand
loyalists

Top 3 Channel Preferences

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



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



D16: Settled in Suburbia

1. #3 buyers for new SUVs
2. Upper middle-class family units living comfortably in established suburbs
3. Brand loyalists
4. Social #1

R12M New, Retail Electrified SUV Buyers

Top 5 Mosaic Lifestyle Segmentation Types

C13
Philanthropic Sophisticates

A01
American Royalty

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

I30
Potlucks and the Great Outdoors

C13
Philanthropic Sophisticates

F22
Fast Track Couples

D15
Sport Utility Families



Q1 2026 Case Study



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



#2 Mosaic Lifestyle Segment for New, Retail Subaru Forester 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



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 Auto Consumer Trends Summary



What are they driving

- SUVs represented 63.45% of new, retail registrations in the last 12M.
- Non-Luxury SUVs were 77.96% of the SUVs registered.
- Electrified SUVs (BEV, PHEVs, Hybrids and other Alt Fuel SUVs) represented 27.68% of the SUVs that were registered.
- 14.4M+ used, retail SUVs were registered



Who are they

- Gen Z SUV buyers over-indexed for Used SUVs. Boomer SUV buyers over-indexed for New SUVs.
- The highest percentage of New SUV buyers had a professional occupation. The highest percentage of Used SUV buyers had a blue-collar occupation.



How to Market to them

- Customize your audience, message and channel to your market and buyer as there are considerable nuances between new and used SUV buyers.
- Email was the preferred channel for the top 2 new, retail SUV Mosaic lifestyle segmentation buyer. Social was the top channel for the 3rd lifestyle segment.

 Save the date



SAVE THE DATE:
September 2026



AUTOMOTIVE CONSUMER
TRENDS REPORT:
Q2 2026
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

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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 bright, sunny outdoor scene with greenery.

Experian Automotive

Thank You!

