



EXPERIAN AUTOMOTIVE

Q2 2026

Automotive Consumer Trends & Analysis

Kirsten Von Busch
Director, Product Marketing
September 10, 2026

Q2 Report overview



EVs – Q2 2026

What electric vehicles (EVs) are on the road and who is buying them?

Vehicles in Operation overview and Consumer Analysis by EV fuel type, for U.S. light duty vehicles through June 30, 2026.

*For this report, EV represents battery electric vehicles.

Q2 2026 timeframe is a rolling 12 Months (R12M) consisting of registrations from July 1, 2025, to June 30, 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

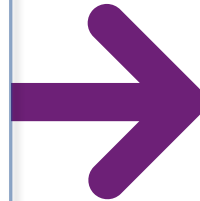


CONSUMER DATA



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

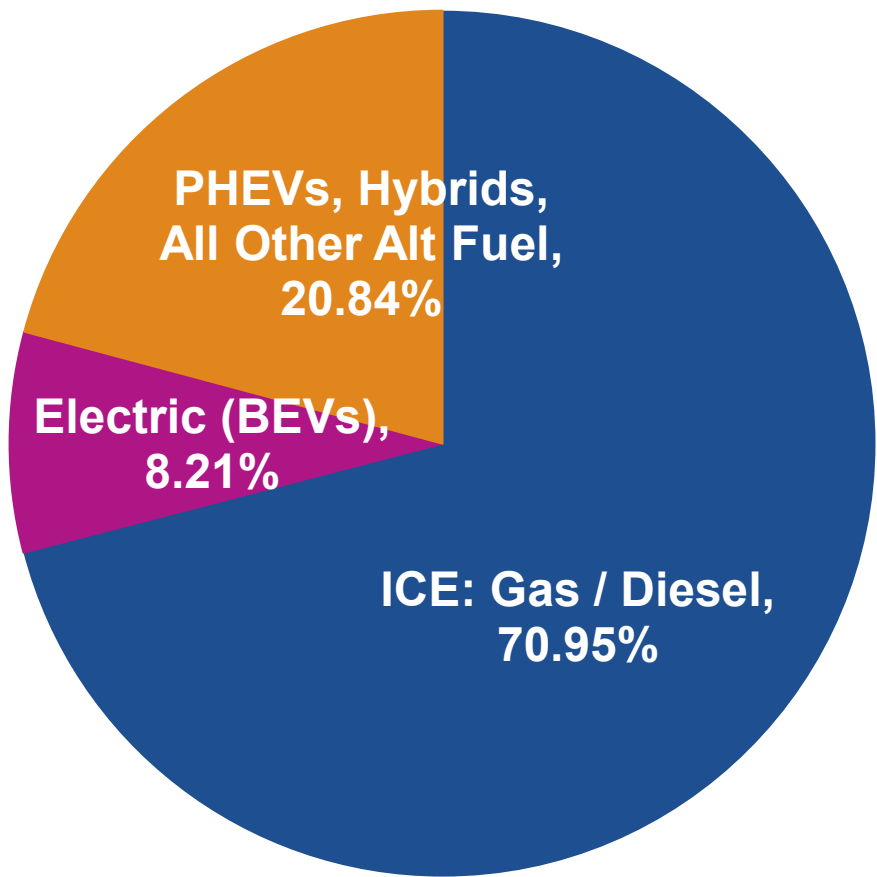
Q2 2026 EV Buyers

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



R12M New, Retail Registration Market Share %

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



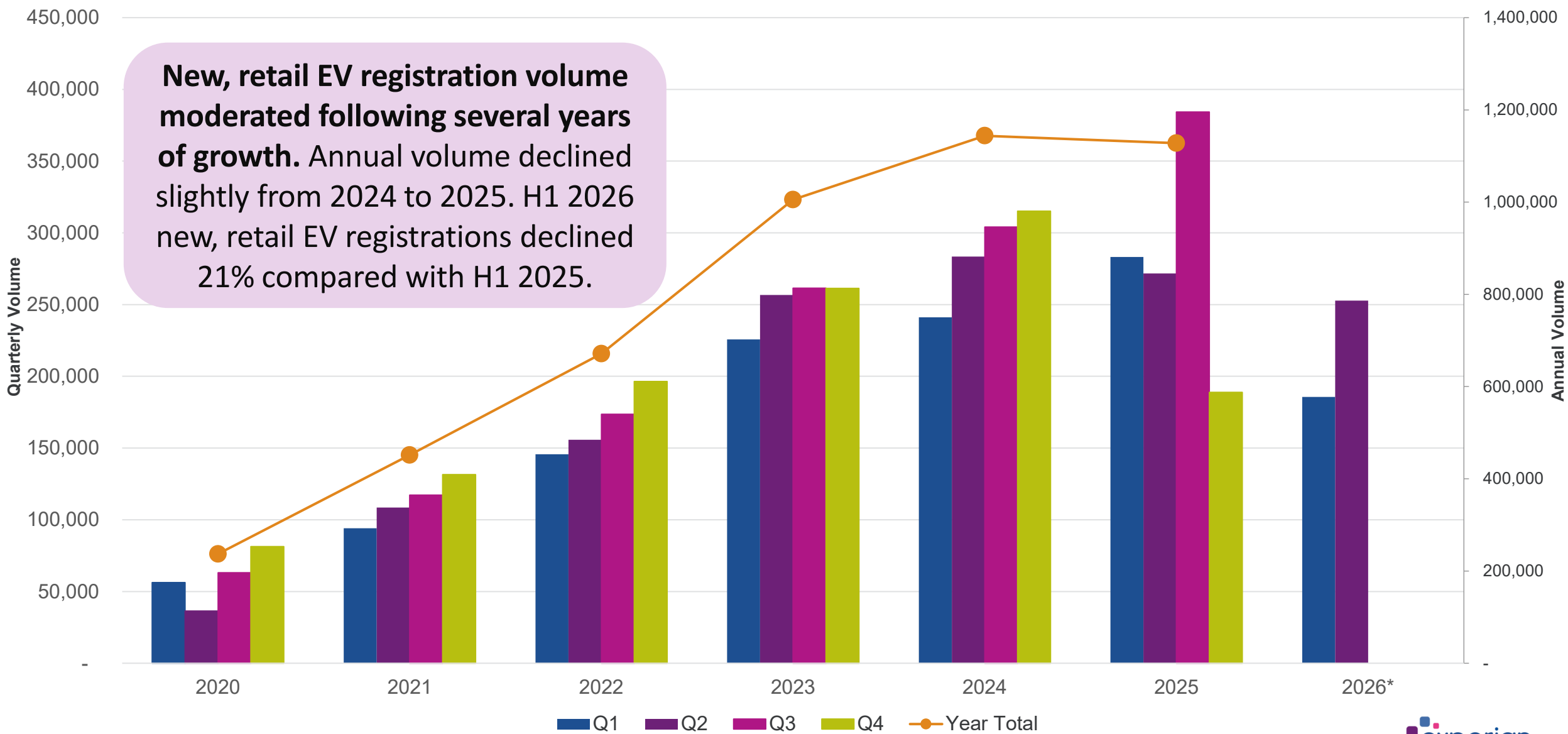
ICE: Gas/Diesel vehicles accounted for **70.95%** of new, retail registrations in the last 12 months. This is **down** from the **71.86%** they represented in **Q2 2025** and the **73.73%** in **Q2 2024**.

Electric (BEVs) accounted for **8.21%**. This is **down** from the **9.23%** for **Q2 2025**, and the **10.47%** for **Q2 2024**.

PHEVs, Hybrids, other alt fuel vehicles accounted for **20.84%**. This is **up** from the **18.91%** for **Q2 2025**, and the **15.80%** for **Q2 2024**.

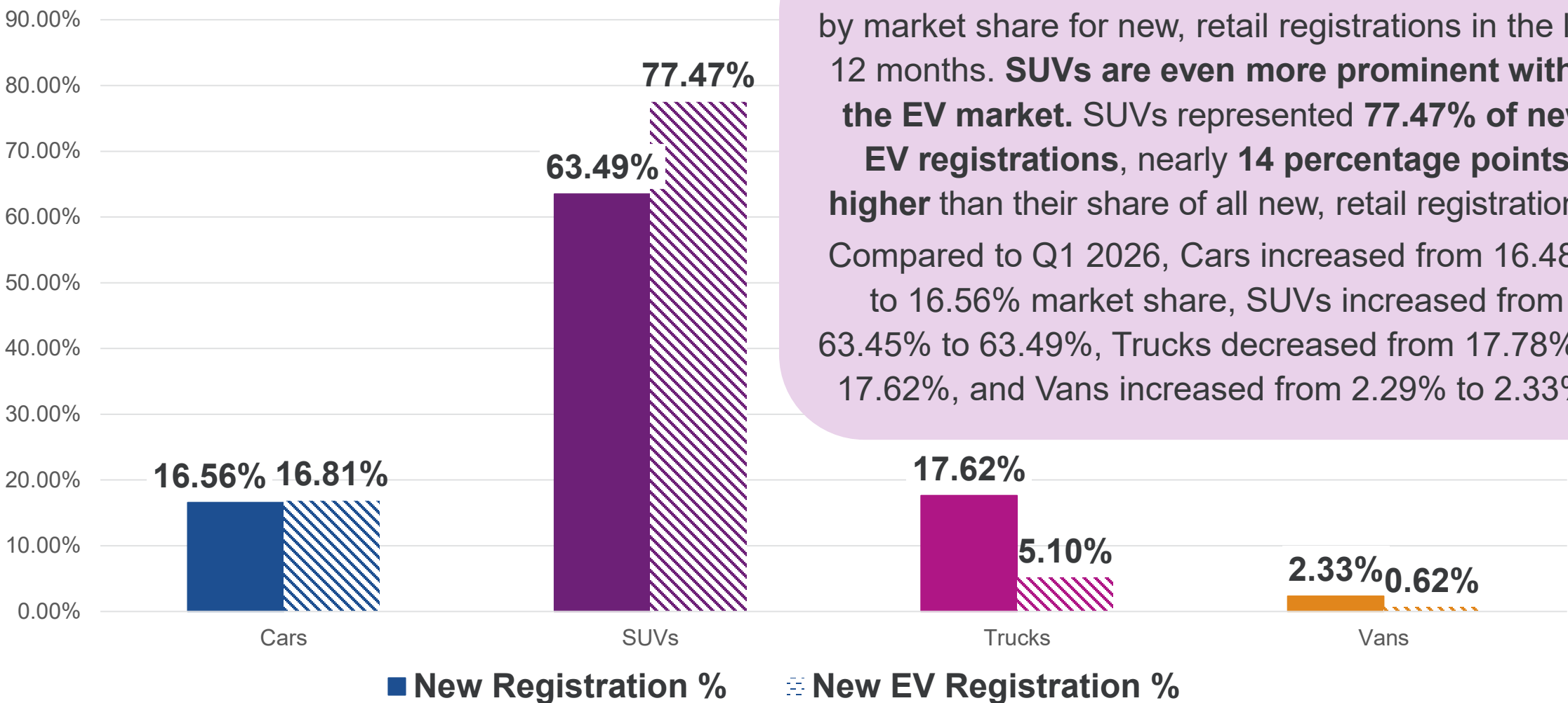
PHEVs, hybrids and other alternative-fuel vehicles represented **20.84%** of new, retail registrations, up **5.04 percentage points** since **Q2 2024**. Electrified options, including BEVs, represented **29.05%** of new, retail registrations, nearly three in 10.

New, Retail EV Registrations Volume by Quarter



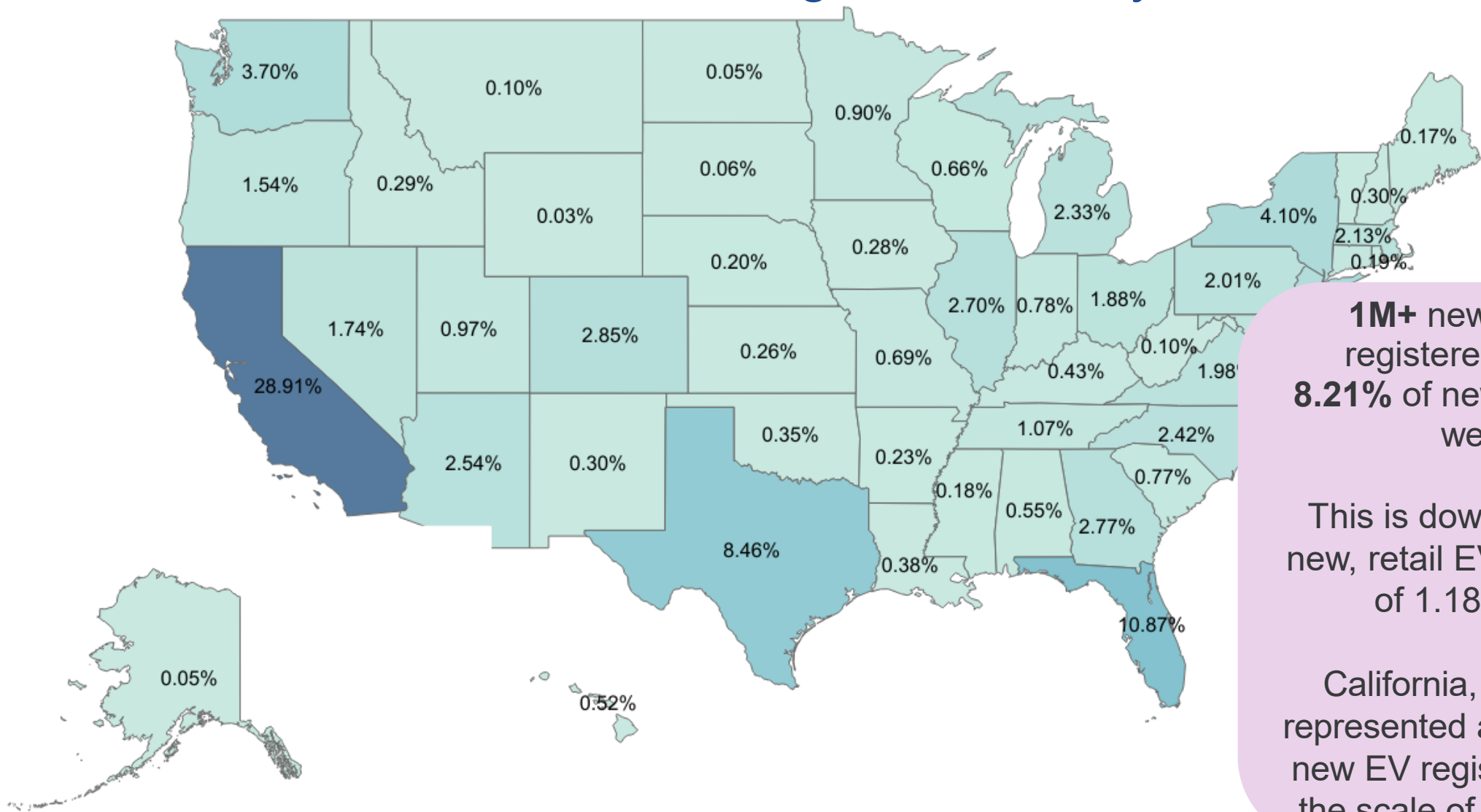
R12M New, Retail Registrations Market Share %

By vehicle segment and fuel type



Once again, SUVs were the largest vehicle segment by market share for new, retail registrations in the last 12 months. **SUVs are even more prominent within the EV market.** SUVs represented **77.47% of new EV registrations**, nearly **14 percentage points higher** than their share of all new, retail registrations. Compared to Q1 2026, Cars increased from 16.48% to 16.56% market share, SUVs increased from 63.45% to 63.49%, Trucks decreased from 17.78% to 17.62%, and Vans increased from 2.29% to 2.33%.

R12M U.S. New, Retail EV Registration % by State and Fuel Type



1M+ new, retail EVs were registered in the last 12M, **8.21%** of new, retail registrations were for EVs.

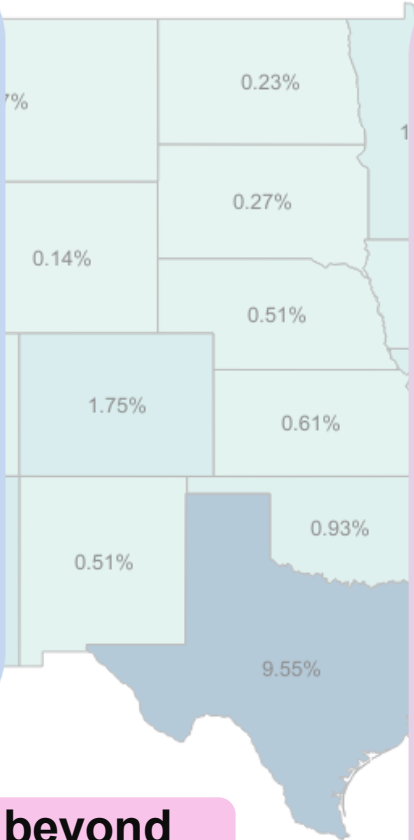
This is down from the Q2 2025 new, retail EV registration volume of 1.18M+ and 9.23%.

California, Florida, and Texas represented approximately **48%** of new EV registrations, highlighting the scale of leading EV markets.

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

New, Retail DMA Rankings:

1.	New York, NY	811K+
2.	Los Angeles, CA	742K+
3.	Dallas-Ft Worth, TX	365K+
4.	Miami-Ft. Lauderdale, FL	329K+
5.	Houston, TX	320K+
6.	Chicago, IL	316K+
7.	Philadelphia, PA	291K+
8.	Detroit, MI	282K+
9.	Boston (Manchester), MA	271K+
10.	San Francisco-Oak-San Jose, CA	259K+



New, Retail, EV DMA Rankings:

1.	Los Angeles, CA	143K+	↑
2.	San Francisco-Oak-San Jose, CA	79K+	↑
3.	New York, NY	64K+	↓
4.	Miami-Ft. Lauderdale, FL	37K+	▬
5.	Seattle-Tacoma, WA	32K+	↑
6.	Dallas-Ft Worth, TX	30K+	↓
7.	San Diego, CA	25K+	↑
8.	Denver, CO	24K+	↑
9.	Chicago, IL	24K+	↓
10.	Atlanta, GA	24K+	↑

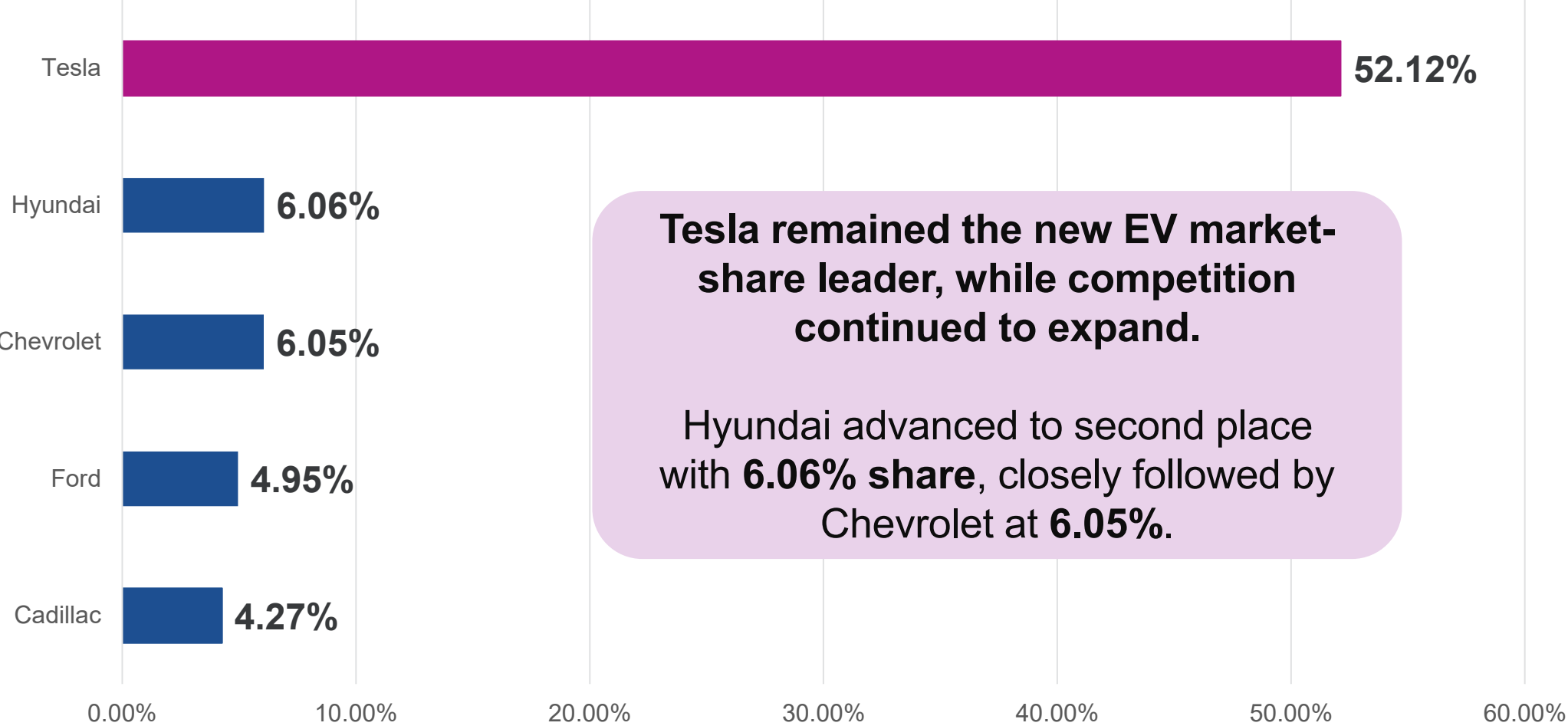
↑ = the DMA ranked **higher** for **EVs** than the overall new, retail DMA ranking

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

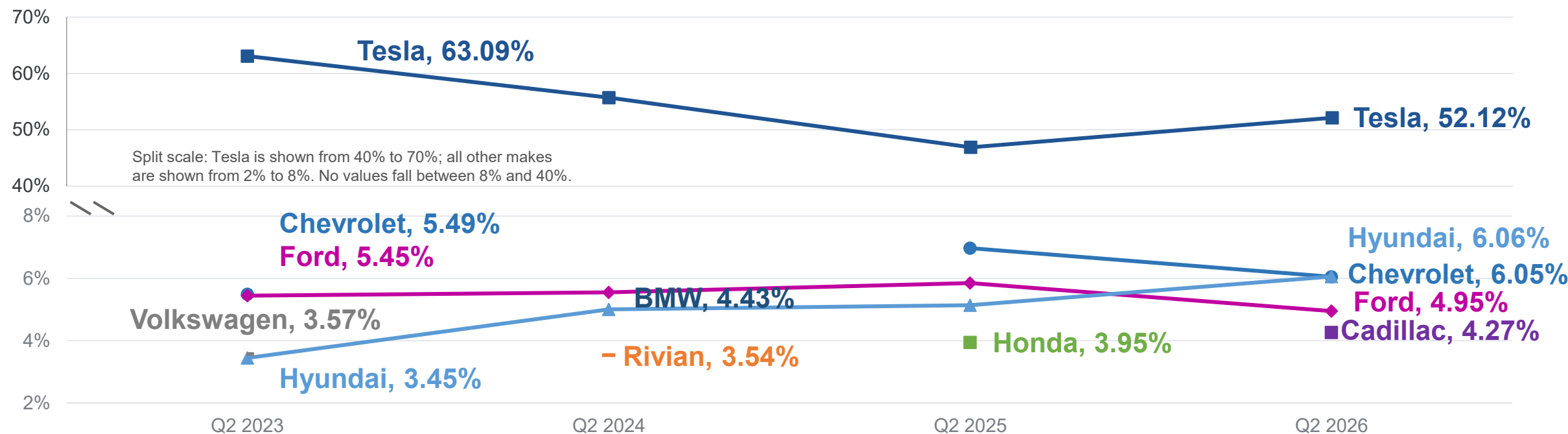
EV demand is elevating several markets beyond their overall registration rank. Six of the top 10 EV DMAs ranked higher for EV registrations than for the overall new-vehicle market: Los Angeles, San Francisco, Seattle, San Diego, Denver and Atlanta.

R12M Top 5 New, Retail EV Registration Market Share %

By vehicle make and fuel type



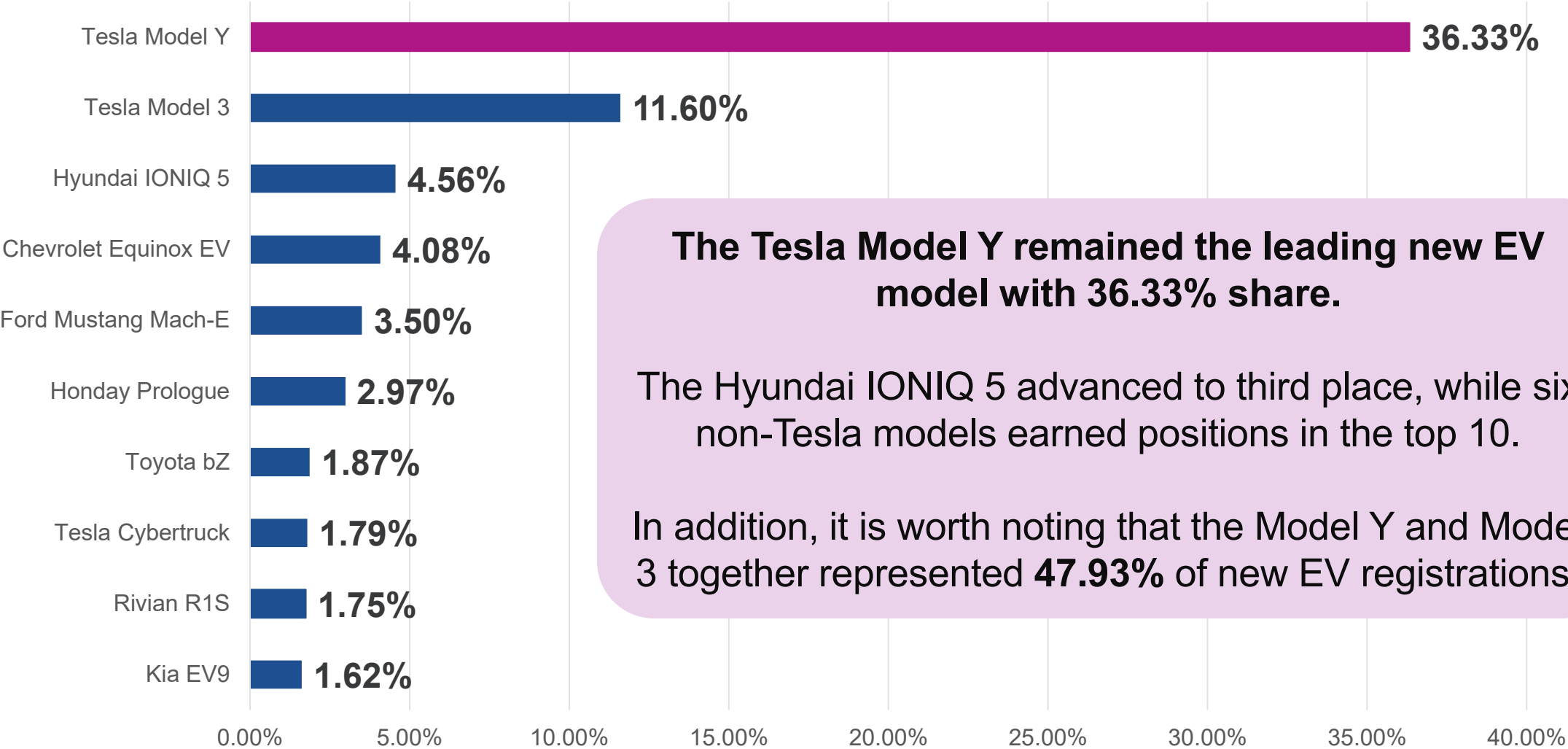
Top 5 New, Retail, EV Registration MS % by Make for the Last 4 Years



Make	Q2 2023	Q2 2024	Q2 2025	Q2 2026
BMW +		4.43%		
Cadillac ★				4.27%
Chevrolet ●	5.49%		6.97%	6.05%
Ford ◆	5.45%	5.55%	5.85%	4.95%
Honda ×			3.95%	
Hyundai ▲	3.45%	5.01%	5.14%	6.06%
Rivian —		3.54%		
Tesla ■	63.09%	55.73%	46.89%	52.12%
VW •	3.57%			

R12M Top 10 New, Retail EV Registration Market Share %

By vehicle model and fuel type



The Tesla Model Y remained the leading new EV model with 36.33% share.

The Hyundai IONIQ 5 advanced to third place, while six non-Tesla models earned positions in the top 10.

In addition, it is worth noting that the Model Y and Model 3 together represented **47.93%** of new EV registrations.

R12M Top 5 EV Market Share % Overview by Model and Fuel Type

New, retail EV registrations

EVs accounted for
8.21%
of new, retail, individual
registrations in the
last 12 months.

	 Tesla Model Y	 Tesla Model 3	 Hyundai IONIQ 5	 Chevrolet Equinox EV	 Ford Mustang Mach-E
New, EV Registration Market Share %	36.33%	11.60%	4.56%	4.08%	3.50%
New, Retail Registration Market Share %	2.98%	0.95%	0.37%	0.34%	0.29%

What Model Did Each Vehicle Replace?

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

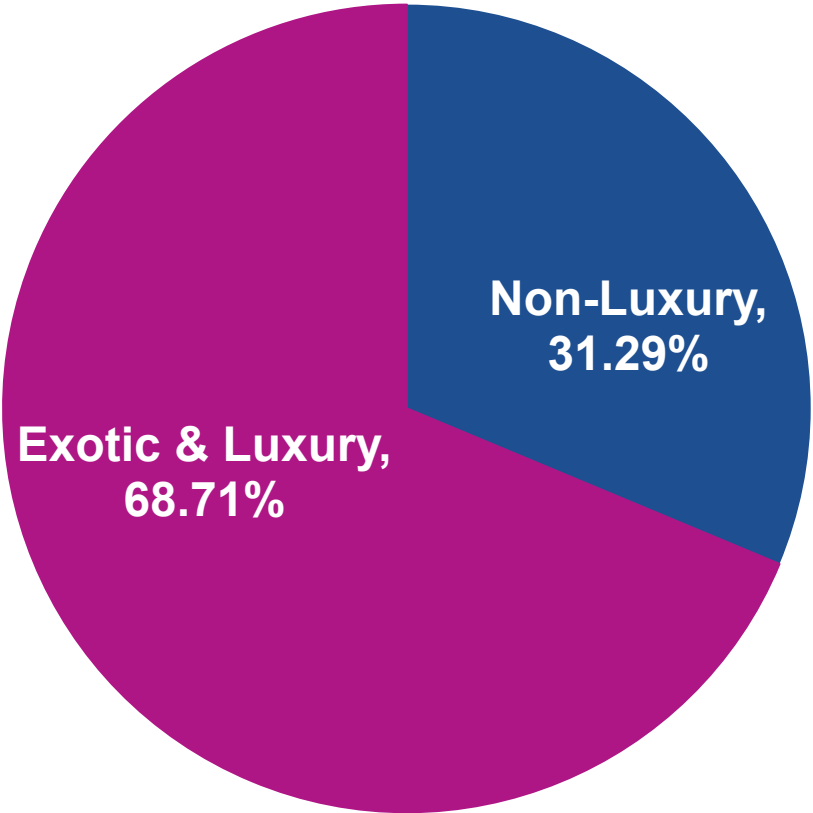
Top 5 In-brand model Inflows

	 Tesla Model Y	 Tesla Model 3	 Hyundai IONIQ 5	 Chevrolet Equinox EV	 Ford Mustang Mach-E
	Including Tesla Models	Including Tesla Models	Including Hyundai Models	Including Chevrolet Models	Including Ford Models
	Tesla Model Y 27.94%	Tesla Model 3 39.37%	Hyundai IONIQ 5 13.52%	Chevrolet Equinox 9.90%	Ford Mustang Mach-E 11.47%
	Tesla Model 3 18.71%	Tesla Model Y 6.59%	Hyundai Tucson 2.13%	Chevrolet Bolt EUV 5.91%	Ford Explorer 4.10%
	Tesla Model X 1.44%	Tesla Model S 1.07%	Hyundai Kona Electric 1.59%	Chevrolet Trax 4.13%	Ford Escape 4.01%
	Tesla Model S 1.16%	Tesla Model X 0.57%	Hyundai IONIQ 6 1.56%	Chevrolet Bolt EV 3.98%	Ford F-150 3.49%
	Tesla Cybertruck 0.11%	Tesla Cybertruck 0.08%	Hyundai Elantra 1.49%	Chevrolet Blazer 2.82%	Ford Edge 3.30%
	All Models	All Models	All Models	All Models	All Models
	Tesla Model Y 27.94%	Tesla Model 3 39.37%	Hyundai IONIQ 5 13.52%	Chevrolet Equinox 9.90%	Ford Mustang Mach-E 11.47%
	Tesla Model 3 18.71%	Tesla Model Y 6.59%	Toyota Prius 3.29%	Chevrolet Bolt EUV 5.91%	Ford Explorer 4.10%
	Honda CR-V 1.91%	Toyota Camry 2.54%	Subaru Outback 2.76%	Chevrolet Trax 4.13%	Ford Escape 4.01%
	Toyota RAV4 1.88%	Honda Civic 2.36%	Honda CR-V 2.71%	Chevrolet Bolt EV 3.98%	Ford F-150 3.49%
	Toyota Camry 1.62%	Honda Accord 2.08%	Subaru Forester 2.50%	Chevrolet Blazer 2.82%	Tesla Model 3 3.31%

Top 5 Inflows from all makes

R12M New, Retail EV Registration Market Share %

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



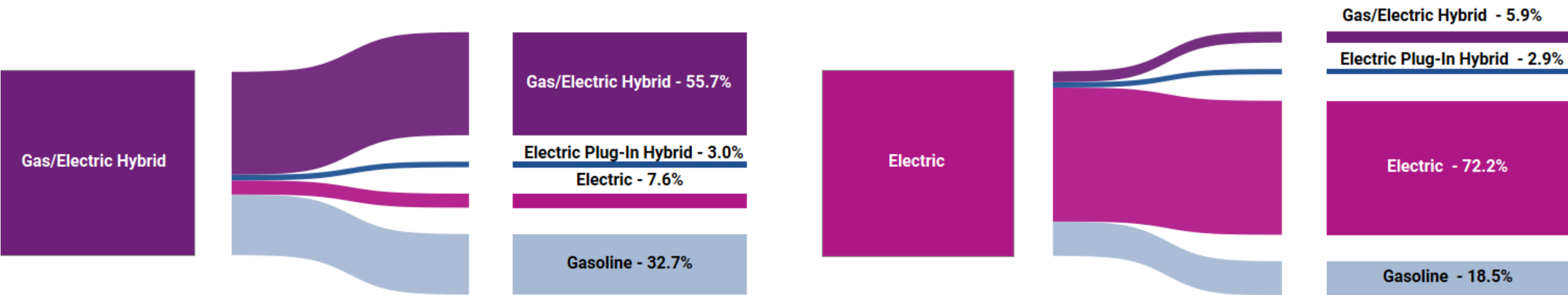
EV demand spans both premium and mainstream vehicle classes.

Non-luxury models represented **31.29% of new EV registrations**, creating meaningful reach beyond the luxury market.

Luxury EVs accounted for **68.70%**, which was largely driven by the classification and volume of Tesla registrations. Exotic EVs accounted for **0.01%**.

Electrified and Gas Vehicles Returning to Market

Vehicle Replacement; New to New

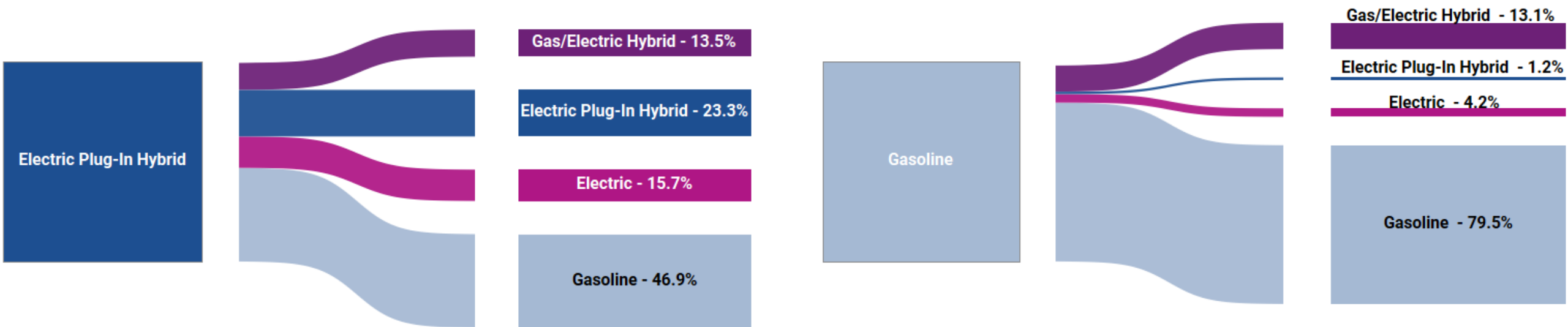


EV owners demonstrated strong loyalty, with 72.2% replaced their EV with another EV, while another 8.8% selected another electrified vehicle. In total, 81.0% remained with an electrified vehicle.

Gas/electric hybrid owners also showed strong loyalty, with **66.3% selecting another electrified vehicle.**

Electrified and Gas Vehicles Returning to Market

Vehicle Replacement; New to New



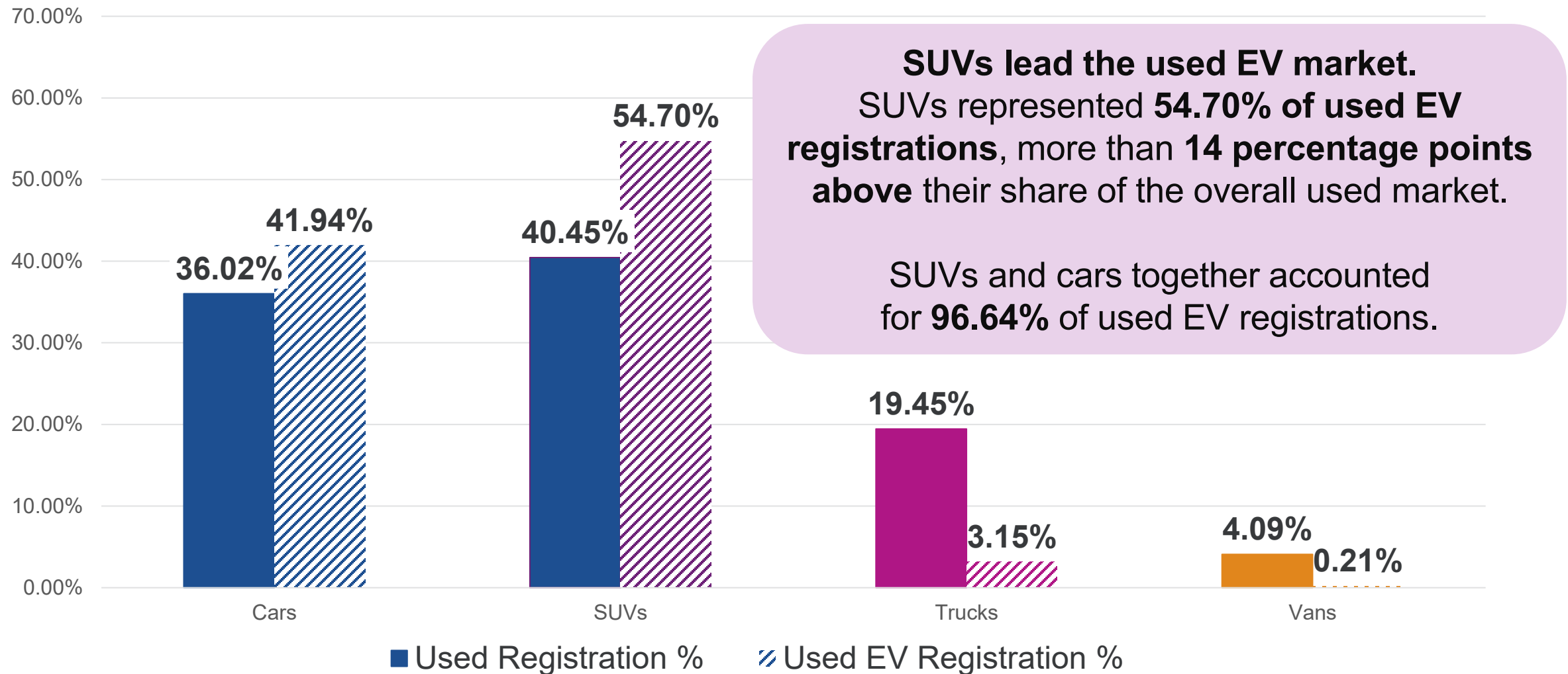
Electrification extends beyond current EV owners.

More than half of plug-in hybrid owners, **52.5%**, selected another electrified vehicle, including **23.3%** who remained with a plug-in hybrid and **15.7%** who moved to an EV.

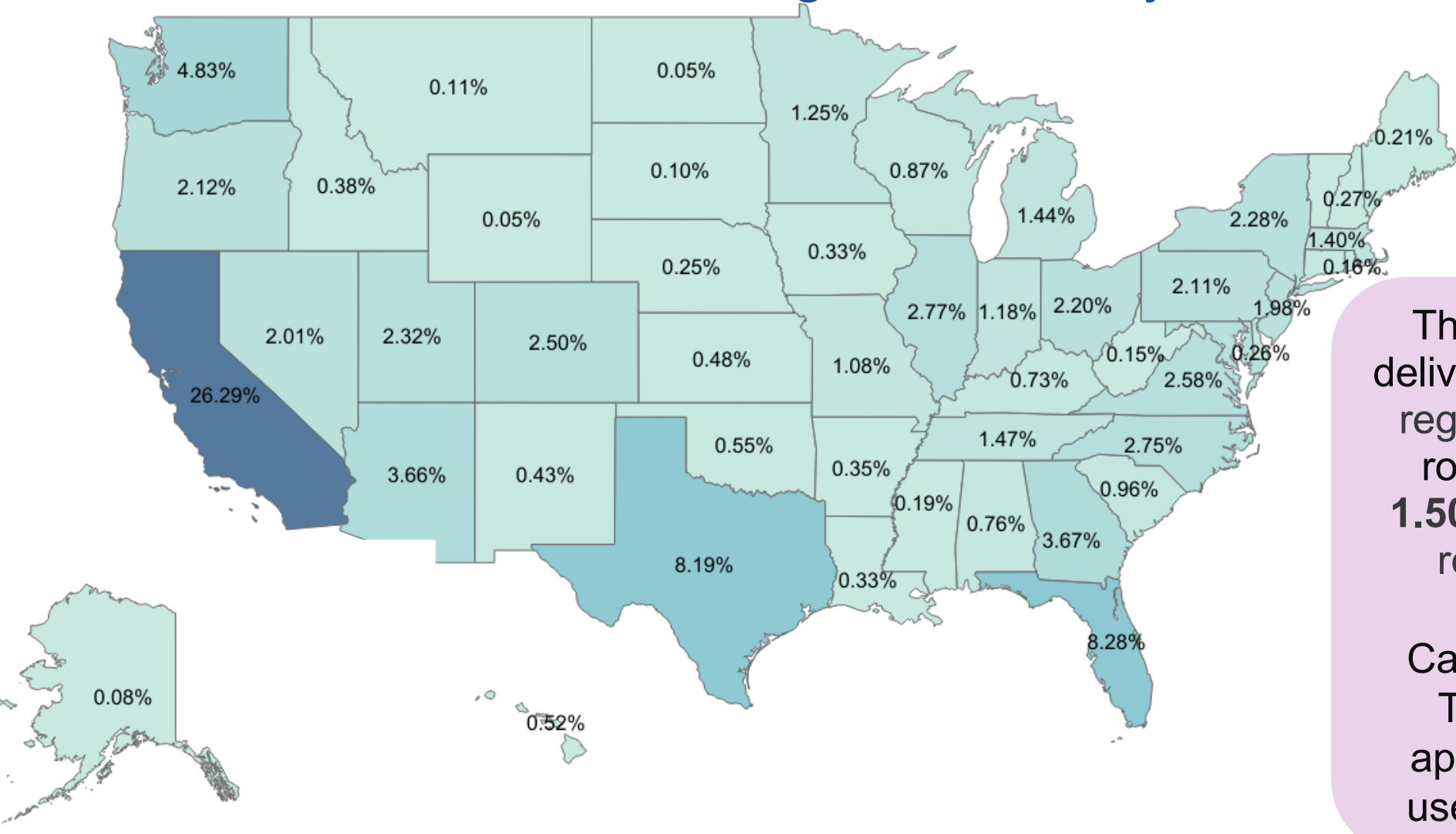
Among gasoline owners, **18.5% moved to an electrified vehicle**, led by gas/electric hybrids at **13.1%**.

R12M Used, Retail Registrations Market Share %

By vehicle segment and fuel type



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



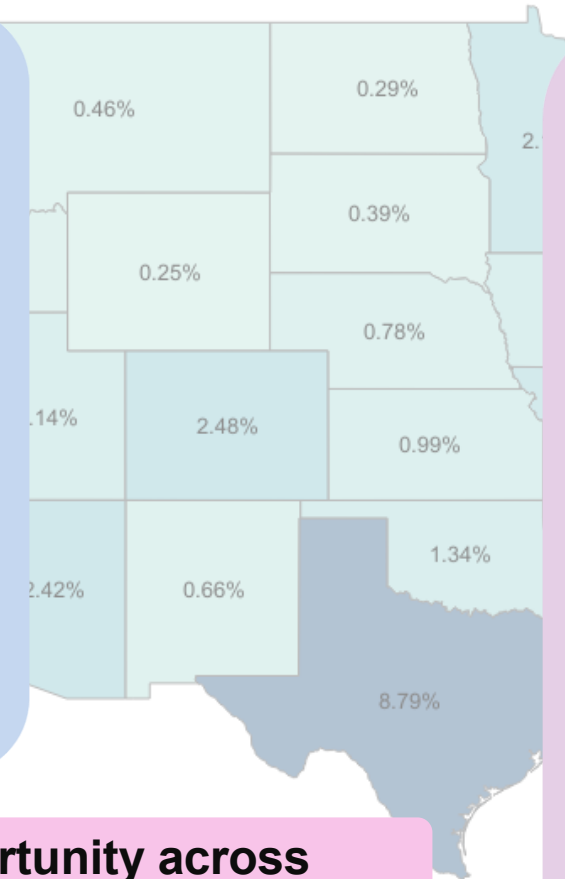
The **used EV market** delivered more than 540K registrations during the rolling 12 months, or **1.50%** of the total used, retail registrations.

California, Florida and Texas represented approximately **43%** of used EV registrations.

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

Used, Retail DMA Rankings:

- | | | |
|-----|-------------------------------|--------|
| 1. | Los Angeles, CA | 1.40M+ |
| 2. | New York, NY | 1.25M+ |
| 3. | Dallas-Ft Worth, TX | 956K+ |
| 4. | Atlanta, GA | 806K+ |
| 5. | Chicago, IL | 798K+ |
| 6. | Houston, TX | 779K+ |
| 7. | Philadelphia, PA | 766K+ |
| 8. | Phoenix (Prescott), AZ | 759K+ |
| 9. | Washington, DC (Hagerstown) | 615K+ |
| 10. | Tampa–St. Pete (Sarasota), FL | 597K+ |



Used, Retail, EV DMA Rankings:

- | | | |
|-----|--------------------------------|---------|
| 1. | Los Angeles, CA | 65K+ == |
| 2. | San Francisco-Oak-San Jose, CA | 32K+ ↑ |
| 3. | Seattle-Tacoma, WA | 21K+ ↑ |
| 4. | Sacramento-Stkton-Modesto, CA | 17K+ ↑ |
| 5. | New York, NY | 17K+ ↓ |
| 6. | Phoenix (Prescott), AZ | 17K+ ↑ |
| 7. | Atlanta, GA | 17K+ ↓ |
| 8. | Dallas-Ft. Worth, TX | 16K+ ↓ |
| 9. | Washington, DC (Hagerstown) | 16K+ == |
| 10. | San Diego, CA | 13K+ ↑ |

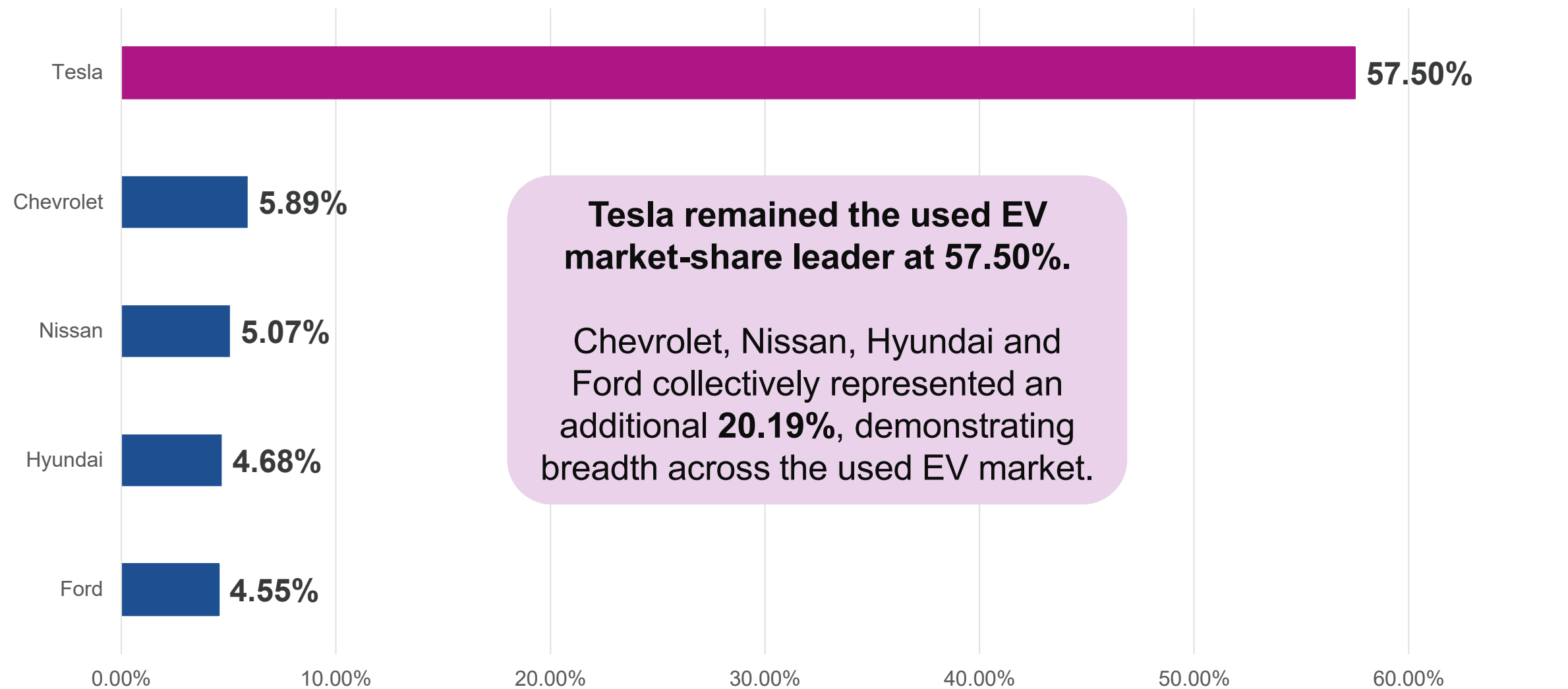
↑ = the DMA ranked **higher** for **EVs** than the overall used, retail DMA ranking

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

Used EV demand is creating opportunity across established and emerging markets. San Francisco, Seattle, Sacramento, Phoenix and San Diego all ranked higher for used EVs than for the overall used market.

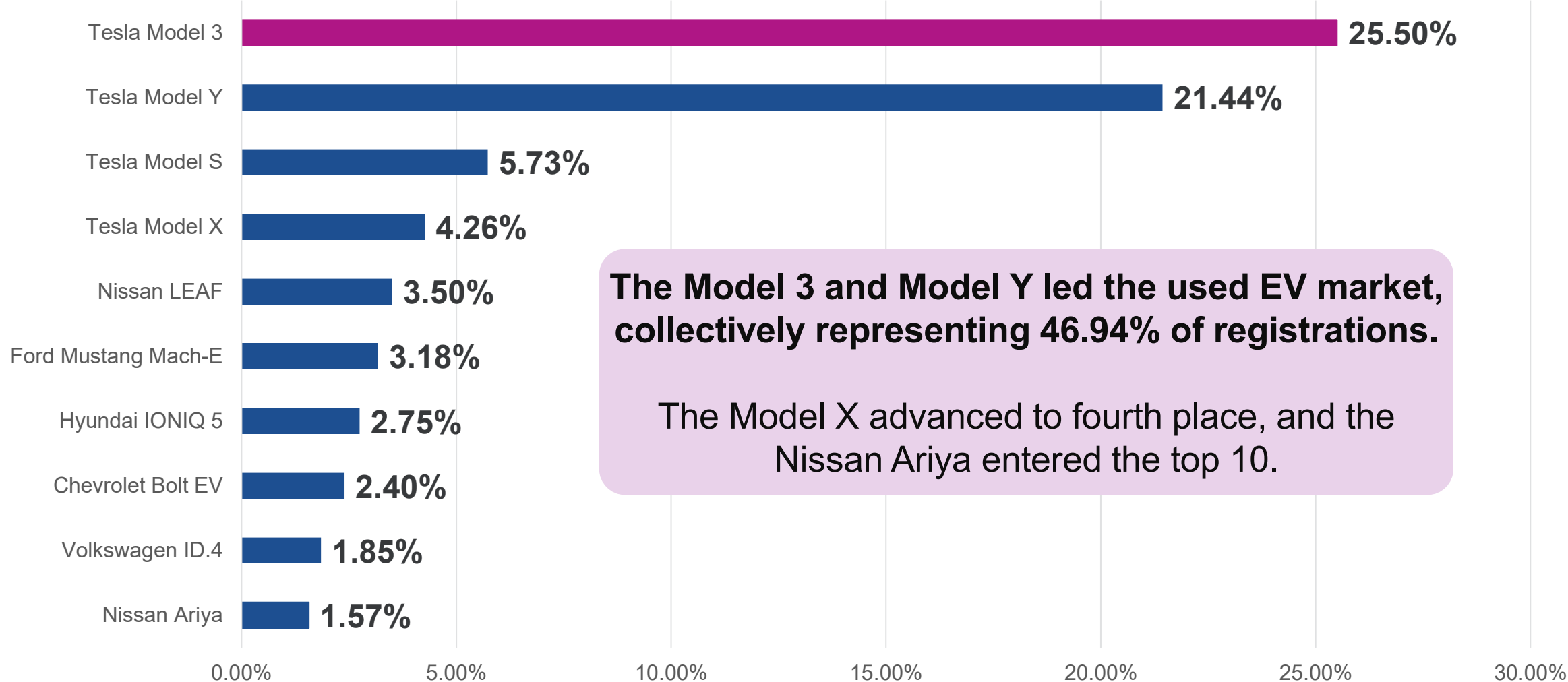
R12 Top 5 Used, Retail EV Registration Market Share %

By vehicle make and fuel type



R12M Top 10 Used, Retail EV Registration Market Share %

By vehicle model and fuel type



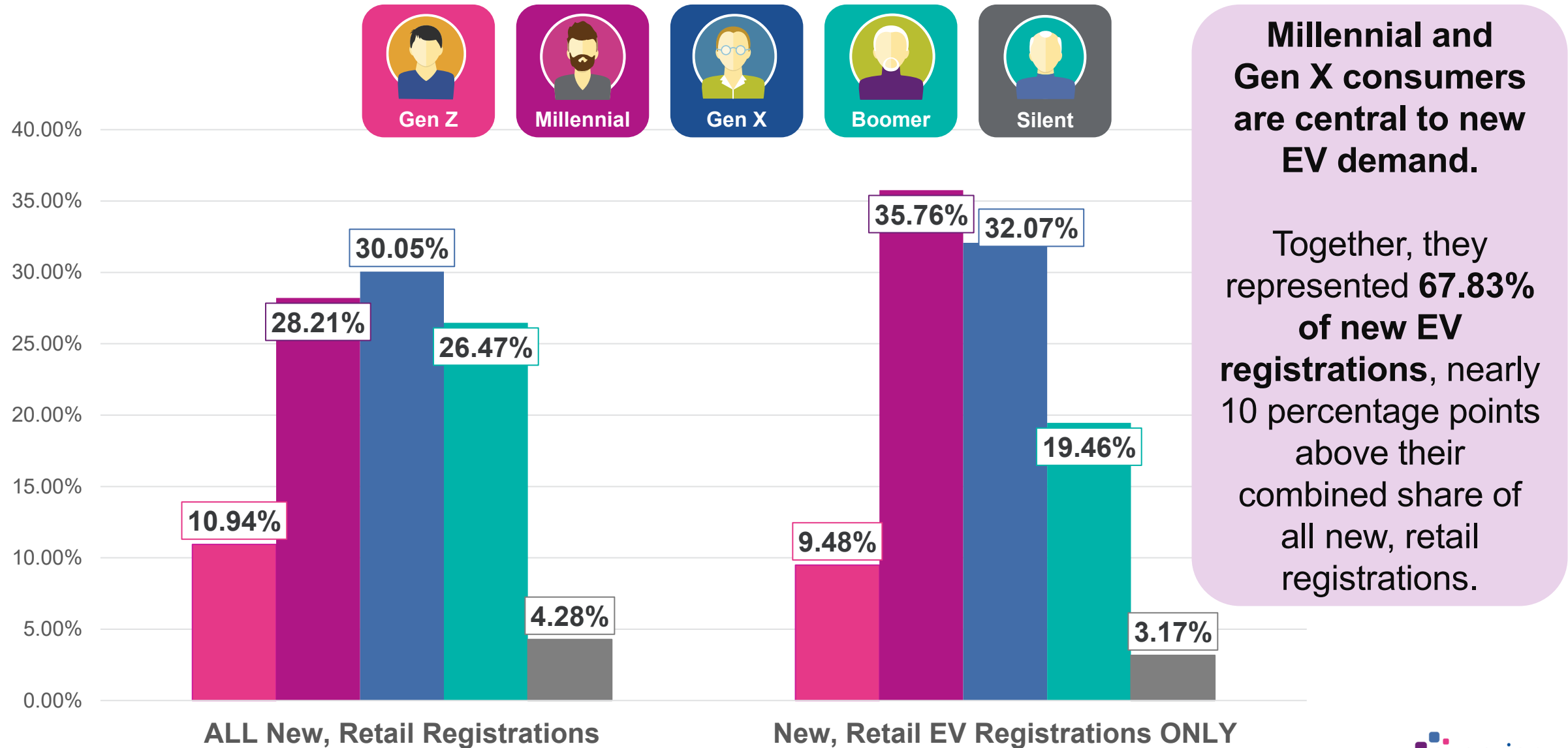
Q2 2026

Who are these buyers?

- Demographic information
- Generational insights
- Lifestyle segmentation

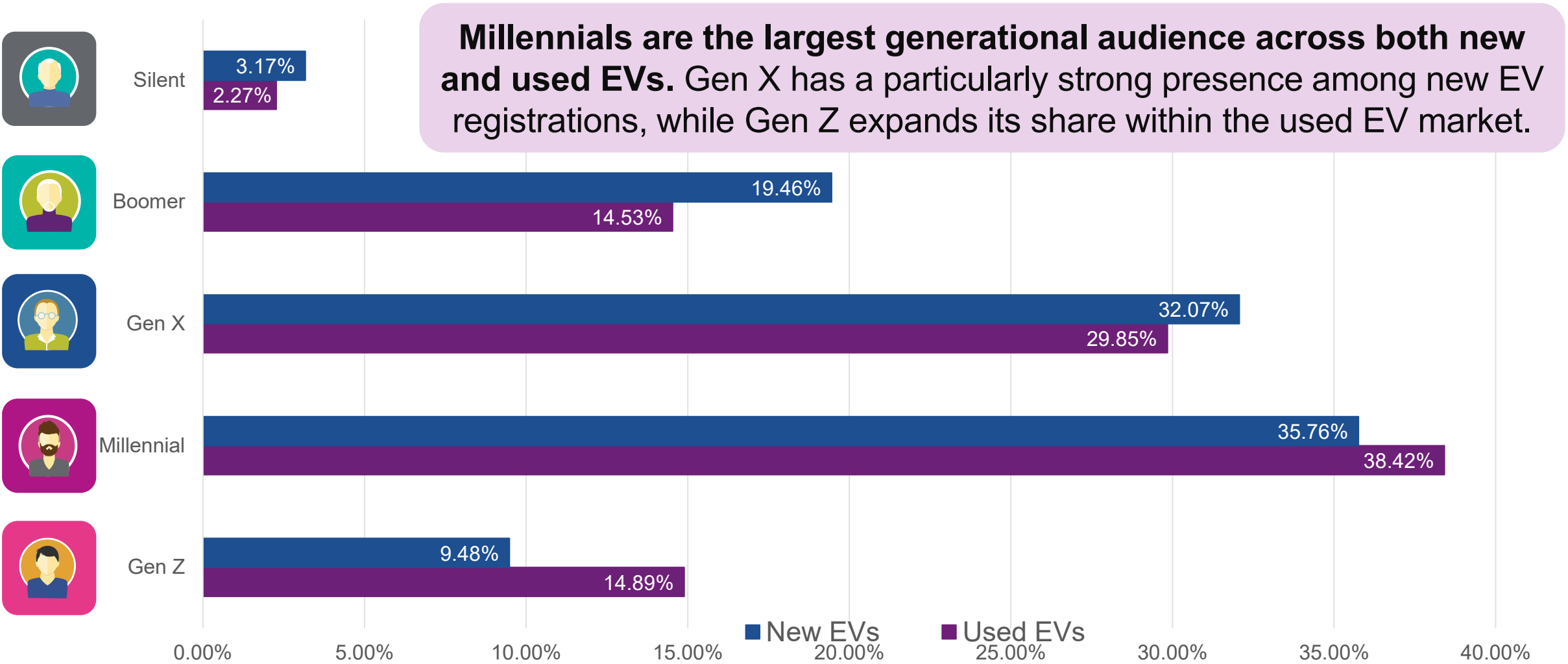


R12M New, Retail Registration % by Generation



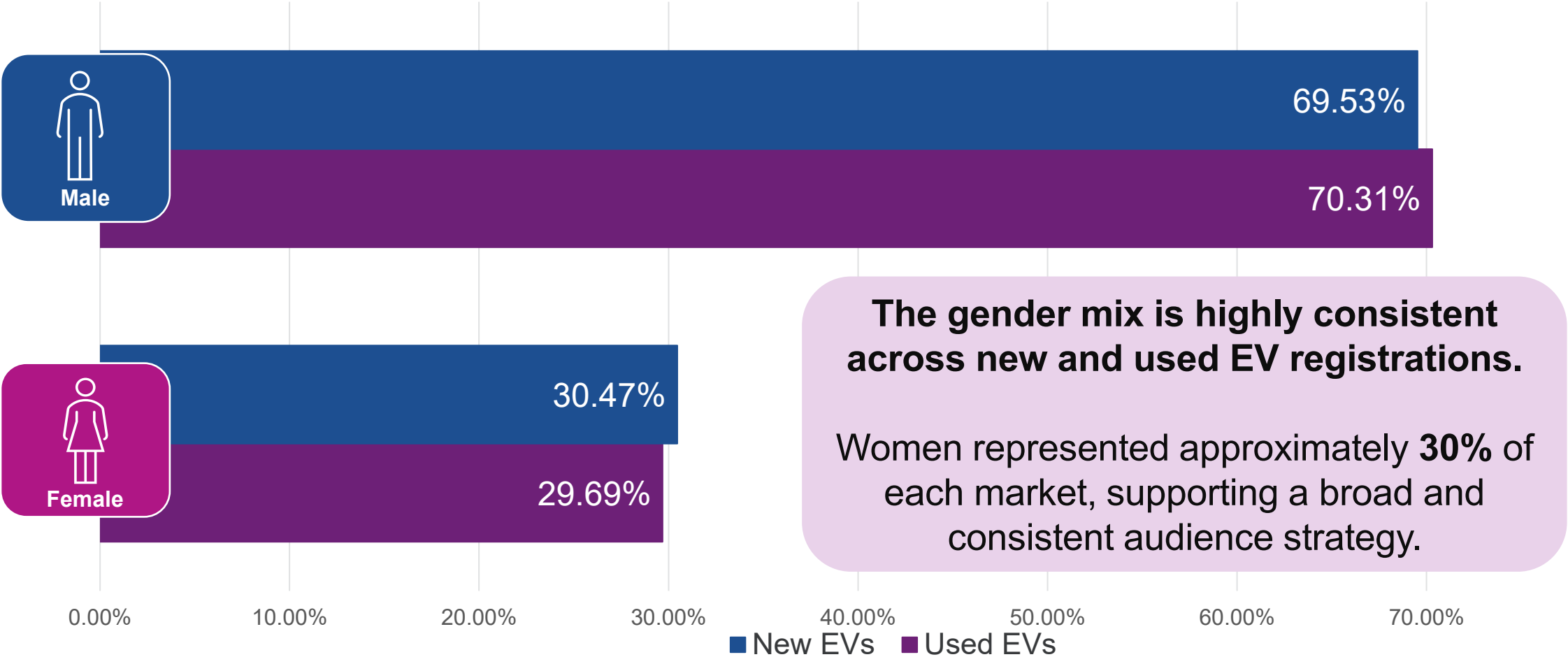
R12M Retail EV Registration Market Share %

By generation, sold as type, and fuel type



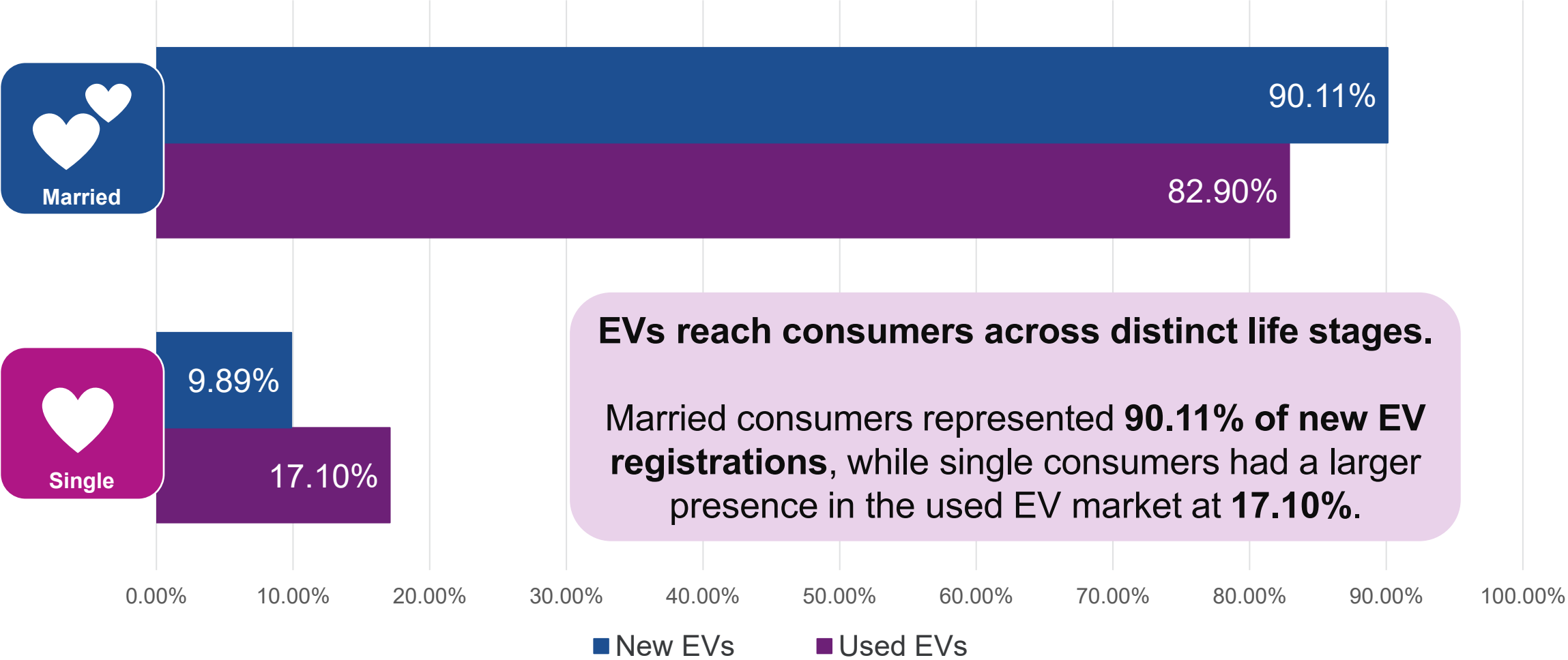
R12M Retail EV Registration Market Share %

By gender, sold as type, and fuel type



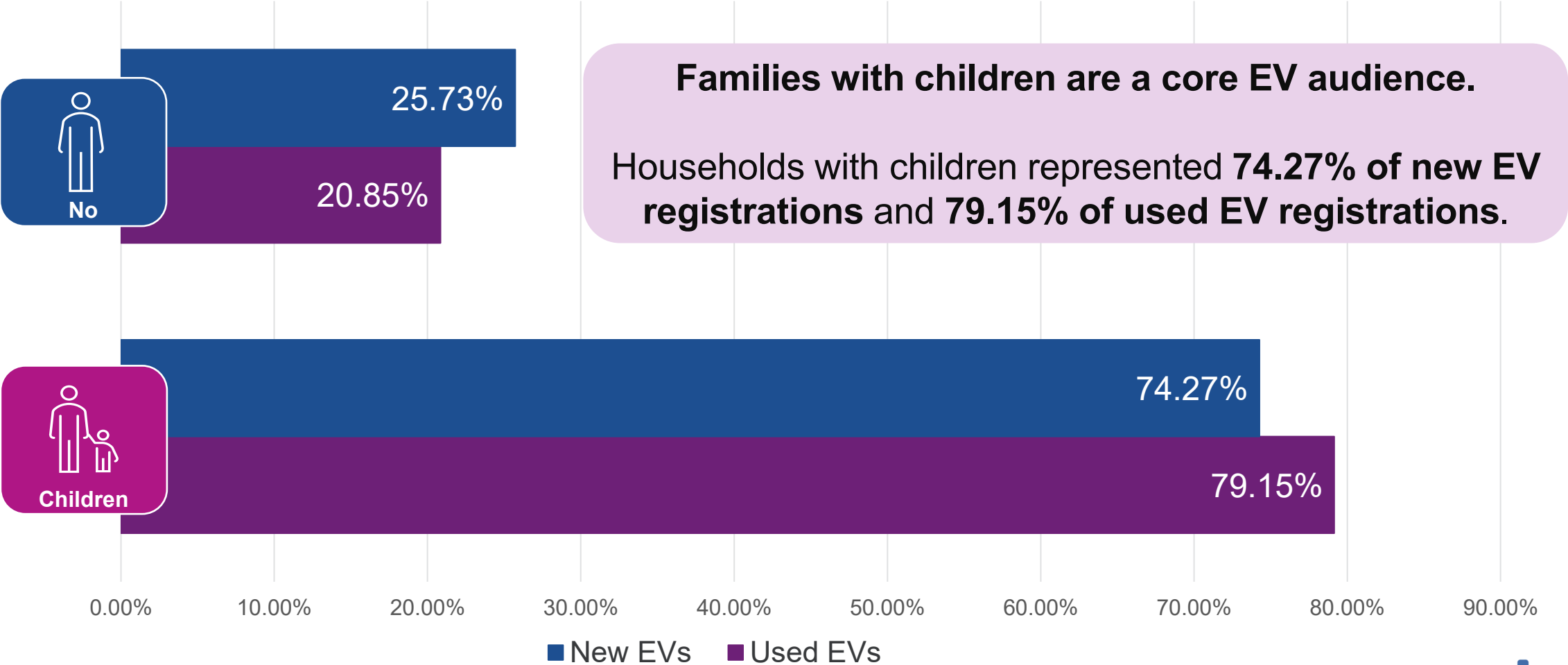
R12M Retail EV Registration Market Share %

By marital status, sold as type, and fuel type



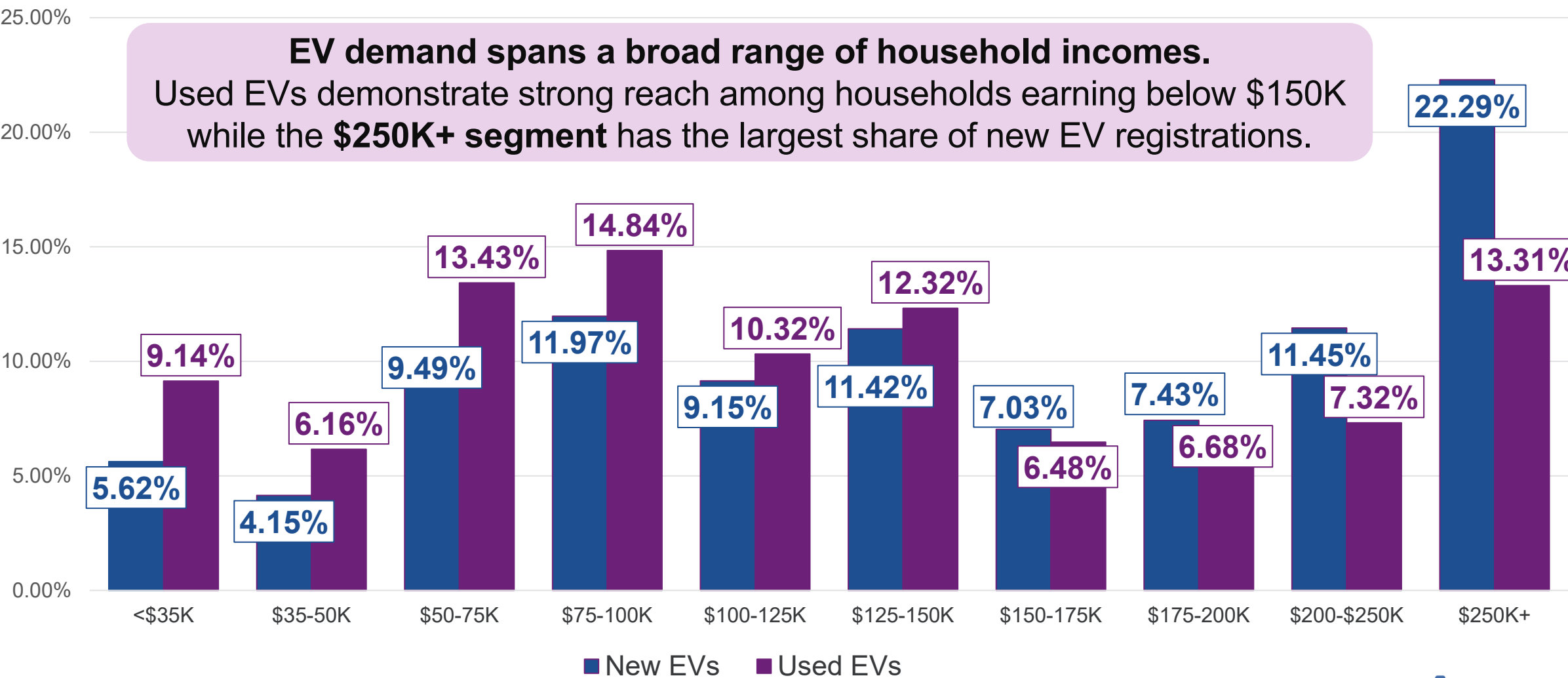
R12M Retail EV Registration Market Share %

By presence of children, sold as type, and fuel type



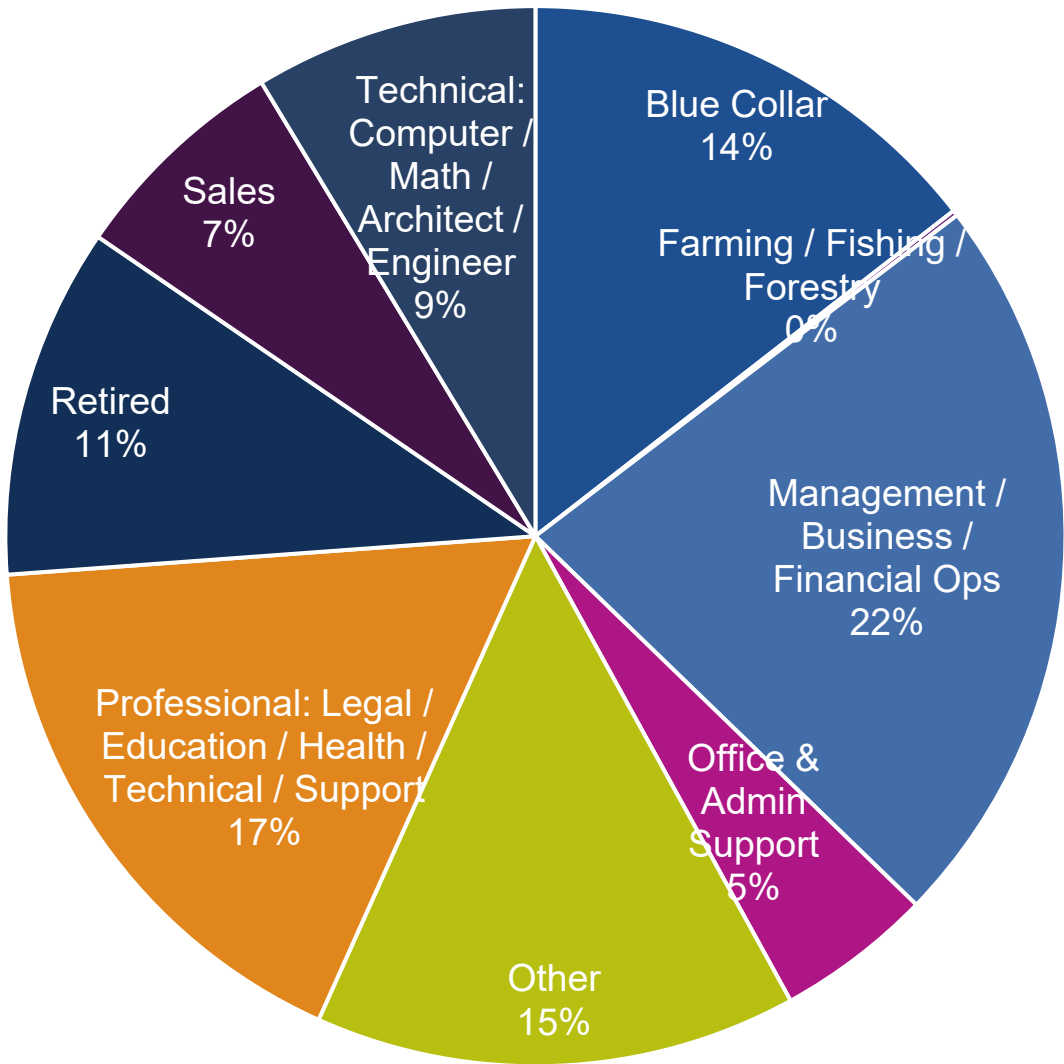
R12M Retail EV Registration Market Share %

By household (HH) income, sold as type, and fuel type



R12M New Retail EV Registration Market Share %

By buyer occupation, sold as type, and fuel type



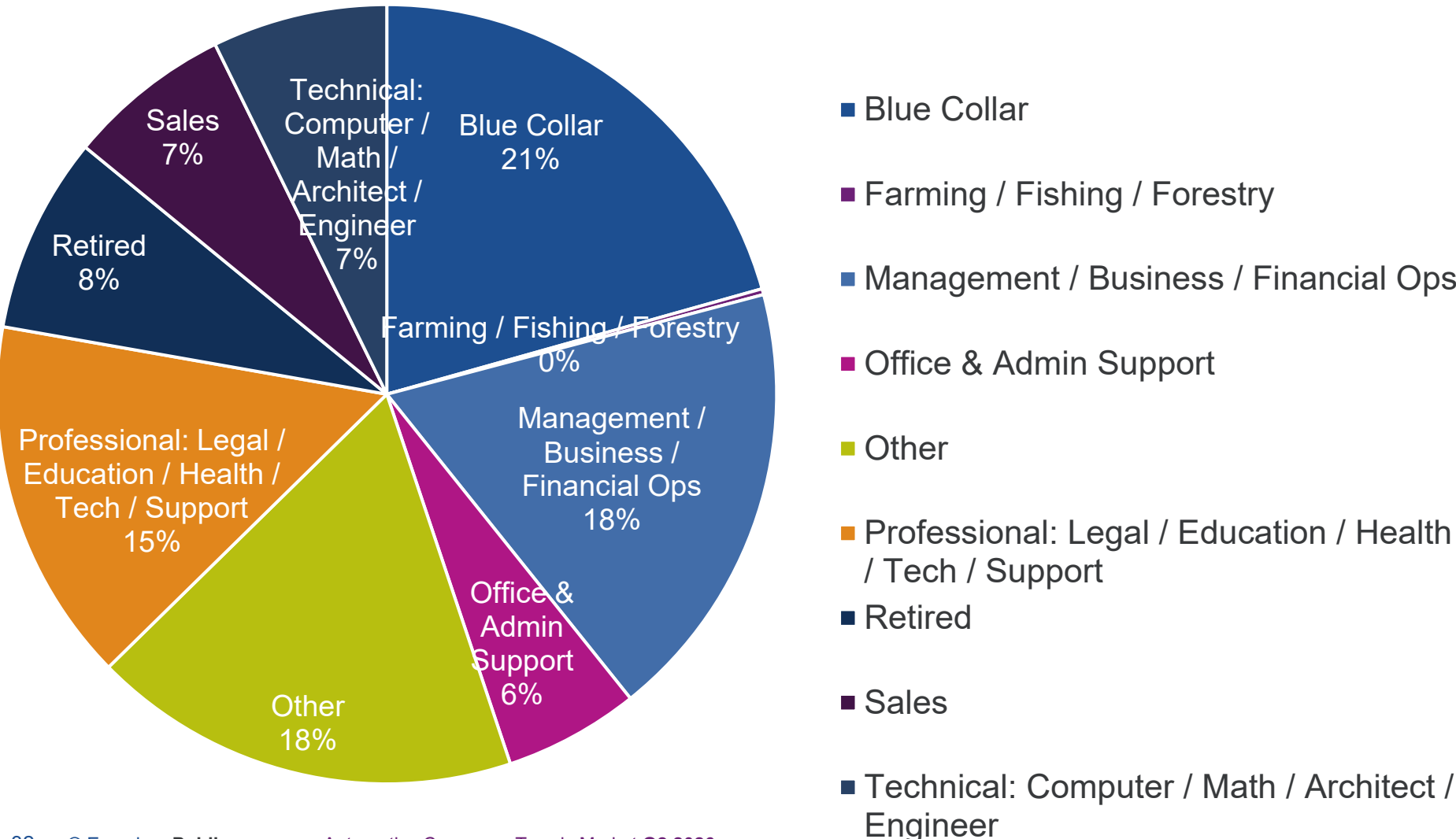
- Blue Collar
- Farming / Fishing / Forestry
- Management / Business / Financial Ops
- Office & Admin Support
- Other
- Professional: Legal / Education / Health / Technical / Support
- Retired

Management, business and financial professionals are the largest new EV occupational segment, representing 22.59% of registrations.

Combined with professional occupations, these consumers account for nearly four in 10 new EV registrations.

R12M Used Retail EV Registration Market Share %

By buyer occupation, sold as type, and fuel type



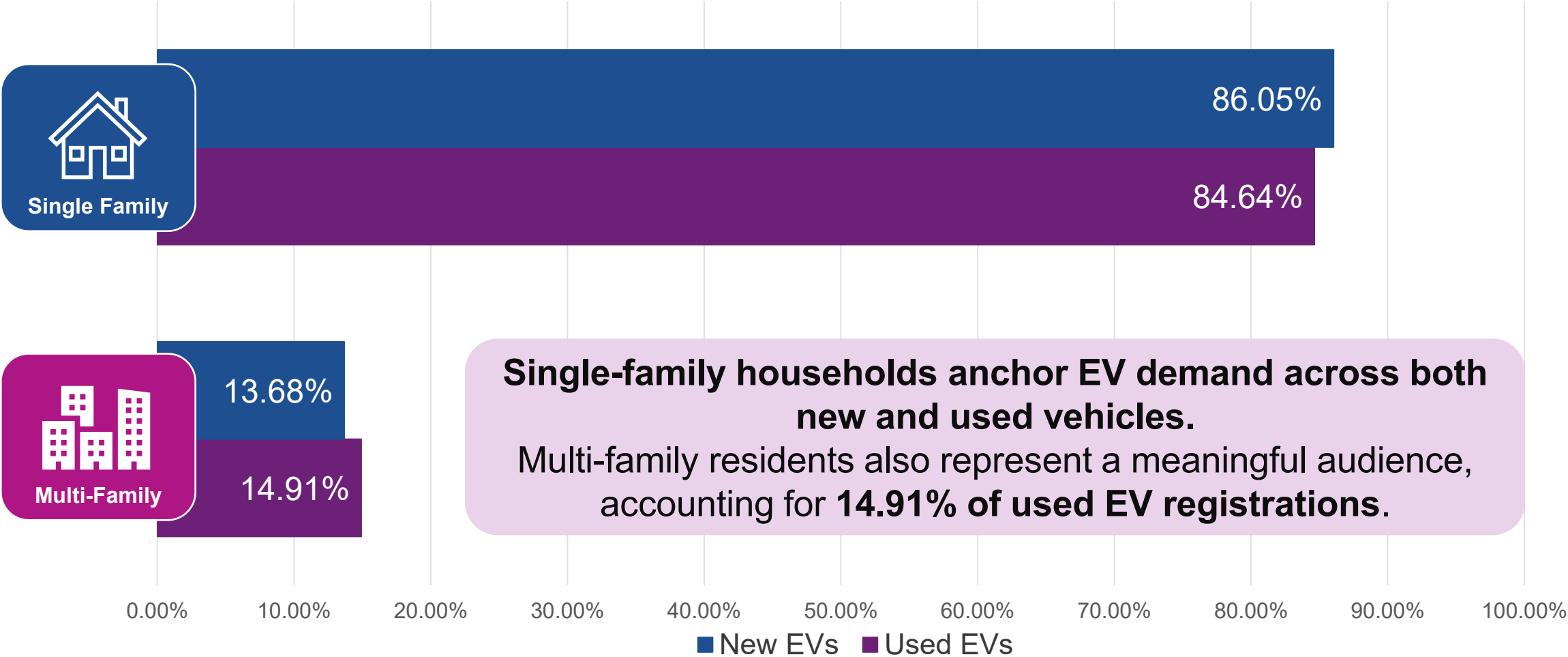
Used EV demand reaches a broad occupational mix.

Blue-collar consumers represented the largest segment at **20.64%**, followed closely by management, business and financial professionals.



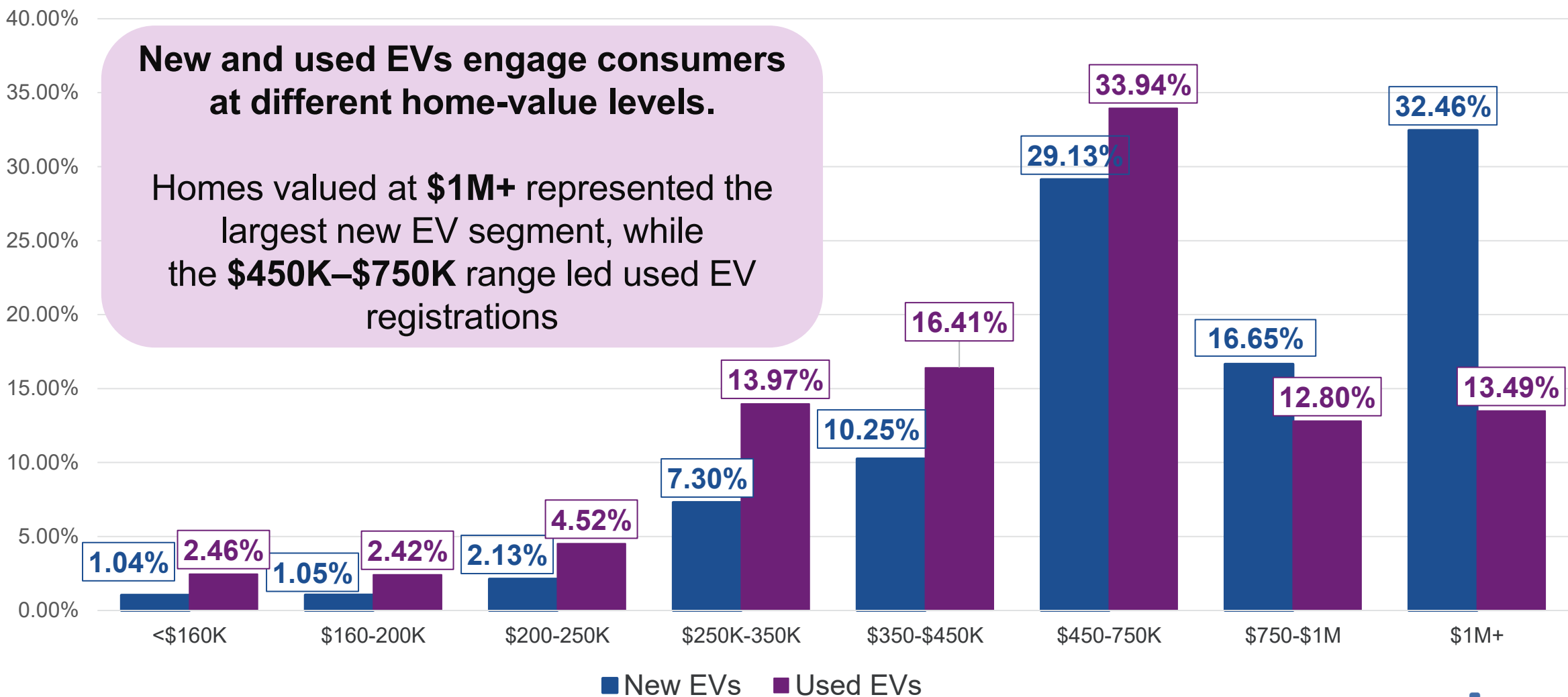
R12M Retail EV Registration Market Share %

By dwelling type, sold as type, and fuel type



R12M Retail EV Registration Market Share %

By home value, sold as type, and fuel type



Q2 2026

How to reach them

Meaningful customer segmentation is critical.

Bring data to life by understanding:

- 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

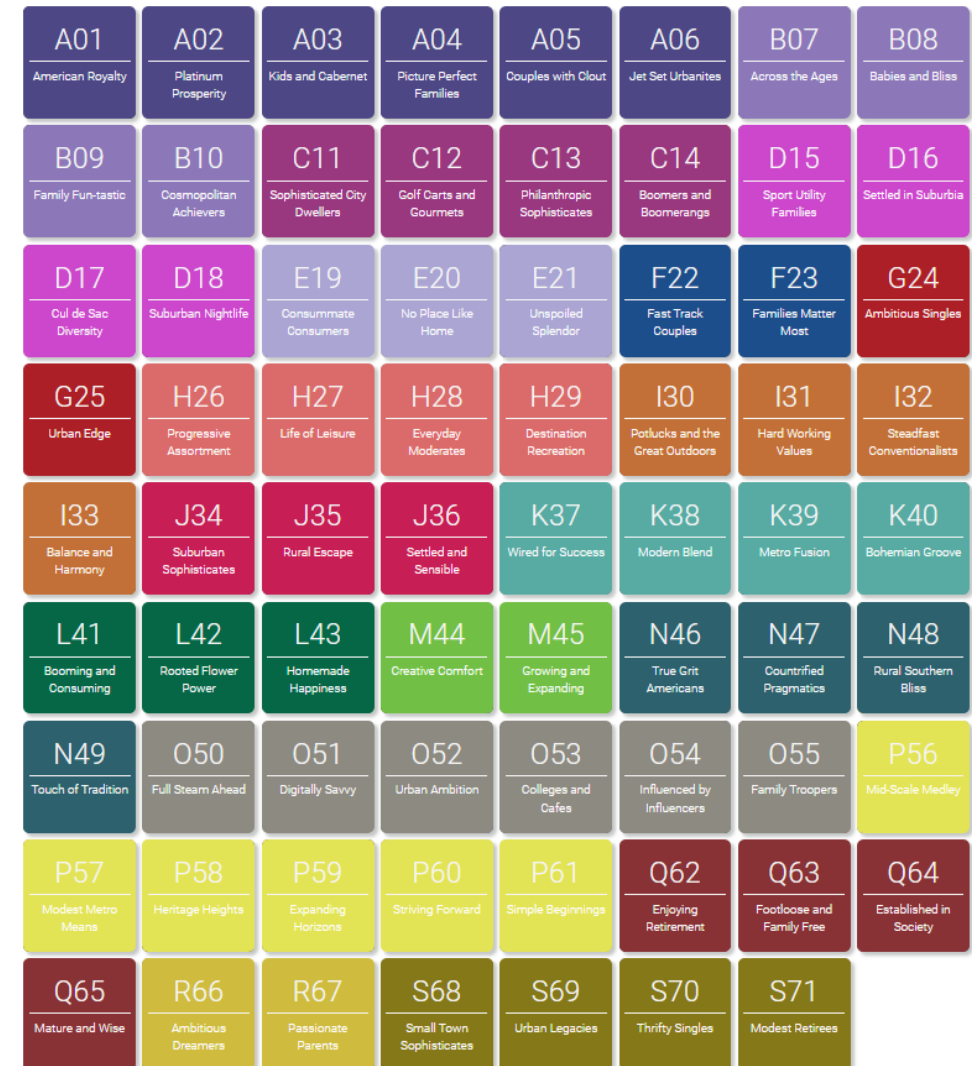
Experian Mosaic divides the marketable U.S. population into **19** Groups and **71** more detailed Types.

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

Experian Mosaic helps identify:

- 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 EV Buyers

Top 5 Mosaic Lifestyle Segmentation Types

A01

American Royalty

C13

Philanthropic Sophisticates

B10

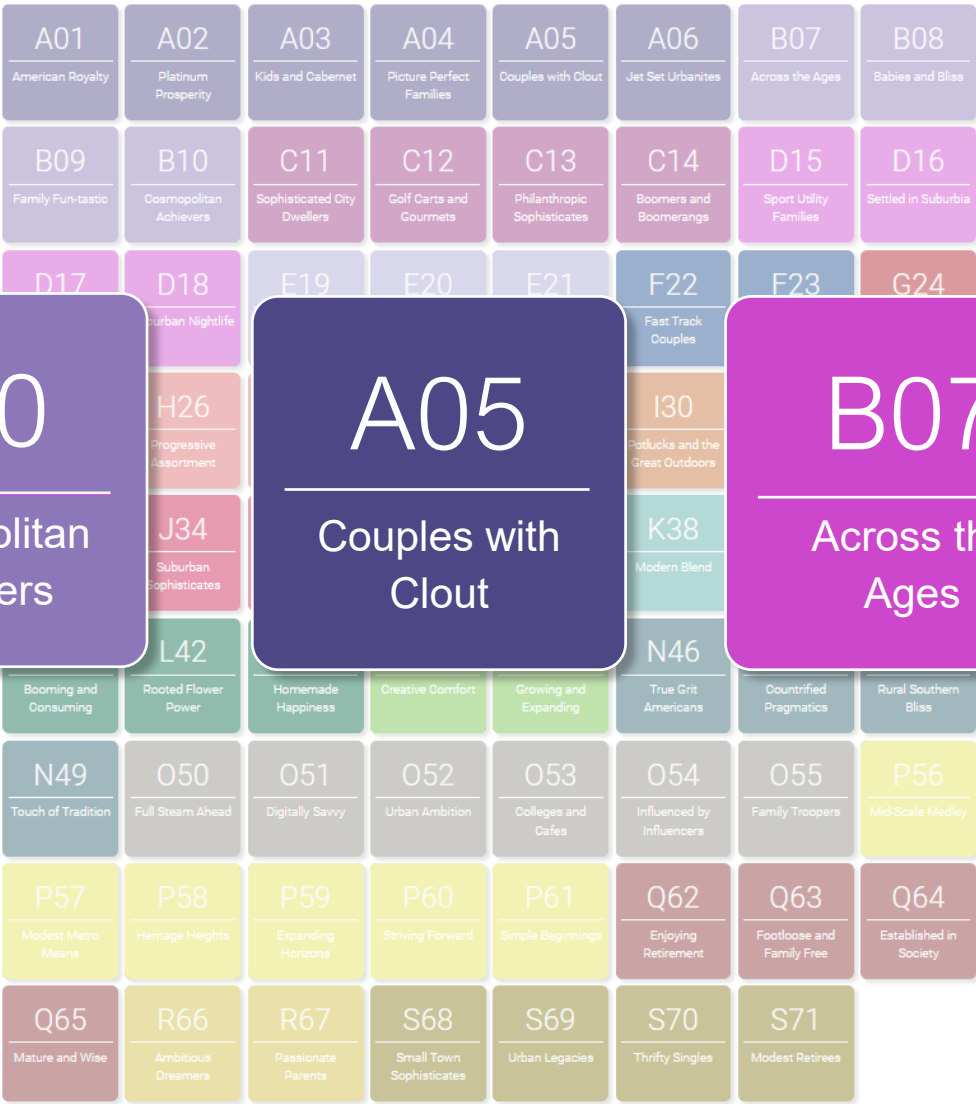
Cosmopolitan Achievers

A05

Couples with Clout

B07

Across the Ages



Top 3 Lifestyle Segments for New Retail EV Buyers

	 A01: American Royalty	 C13: Philanthropic Sophisticates	 B10: Cosmopolitan Achievers
U.S. Population	7.8M	11.3M	4.7M
% Households	2.26%	4.09%	1.73%
% Individuals	3.34%	4.92%	2.09%
Overview	Affluent, influential and successful couples and families living in prestigious suburbs.	Mature, upscale couples in suburban homes.	Affluent middle-aged couples and families enjoying dynamic lifestyles in metro areas.

Top 3 Lifestyle Segments for New Retail EV Buyers



**A01:
American
Royalty**



**C13:
Philanthropic
Sophisticates**



**B10:
Cosmopolitan
Achievers**

General Insights

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

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

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

Technology Adoption



Journeymen



Apprentices



Journeymen

Top 3 Lifestyle Segments for New Retail EV Buyers



**A01:
American
Royalty**



**C13:
Philanthropic
Sophisticates**



**B10:
Cosmopolitan
Achievers**

Top Buying Style

Quality
matters

Brand
loyalists

Quality
matters

Top 3 Channel Preferences

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



R12M Used, Retail EV Buyers

Top 5 Mosaic Lifestyle Segmentation Types

C13

Philanthropic Sophisticates

A01

American Royalty

A05

Couples with Clout

F22

Fast Track Couples

B07

Across the Ages



Q2 Auto Consumer Trends Summary



What are they buying

- More than 1M new EVs and 540K used EVs were registered during the rolling 12 months.
- SUVs lead both markets and are especially prominent among EV registrations.
- Electrified options now represent nearly three in 10 new, retail registrations.



Who are they

- Millennials are the largest audience across both new and used EVs.
- Families with children represent the majority of EV registrations.
- New and used EVs engage complementary income, life-stage and occupational audiences.



How to Market to them

- Use distinct audience strategies for new and used EV consumers.
- Align creative with quality, loyalty, lifestyle and household needs.
- Combine email, television and other preferred channels based on Mosaic audience profiles.

Experian Automotive Solutions

Helping the automotive industry turn insights into action.



Marketing Solutions

Description	Product Name
Clean, Complete & Connect Your Customer Data.	- Data Hygiene & Append Services (email/phone/MAID/IP) - Graph - OmniView™
Verify Vehicle Ownership.	Auto VIN Verification SM Auto Ownership Tracking SM
Communicate Recalls to Current Owners.	Auto Recall Manager SM
Enrich & Enhance Your Consumer Data.	1st Party Data Enrichment - ConsumerViewSM & Mosaic®
Audience Targeting	- Experian Marketing Engine™ AutoAudiences - Syndicated Audiences
Campaign Measurement	- Auto Response Analysis - Outcomes



Fraud Solutions

Description	Product Name
Identify & Detect Fraud	Fraud Protect SM



Vehicle History Data

Description	Product Name
Vehicle History Report	Experian AutoCheck®
Vehicle History API's	Auto AccuSelect™
Plate2VIN, VIN2Lein, VIN2 Recall	Auto VIN Gateway SM
Inventory and Portfolio Monitoring	AutoCheck Triggers SM



Automotive Market Statistical Sol.

Description	Product Name
Market & Business Intelligence.	Velocity SM Statistics
Automotive Market Share Reporting.	Velocity Market SM
Automotive Finance Market Analysis.	Velocity Risk SM
Historical Loan and Lease Performance.	Velocity Performance SM
Current Registrations for Vehicles on the Road.	Velocity SM Vehicles in Operation (VIO)
Measure Customer Re-Purchase Activity.	Velocity SM Loyalty

Electric Vehicle (EV) Audience Insights



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



New, Retail Individual Registrations in the last 12 Months



**1M+ New, Retail EV
Registrations**



**8.21% New, Retail
Registrations were for
Electric Vehicles (EVs)**

Attributes of In-Market Buyers

- High Indexing Content Preferences
- Other In-Market Categories
- Top Publishers (Web & CTV)
- Channel Snapshot
- *Experian segment taxonomy for Audience selection*

Open Internet attributes of audiences **In-Market for EVs**



High Indexing Content Preferences



News & Politics



Business & Finance



Pet



Travel

Top Shopping Categories

Apparel

Books & Literature

Luxury Goods

Children's Toys & Games

Top Publishers: Web, CTV & Audio



The New York Times

Paramount+

peacock

Spreaker
From iHeartMedia

podcastone

Channel Snapshot

86% on CTV

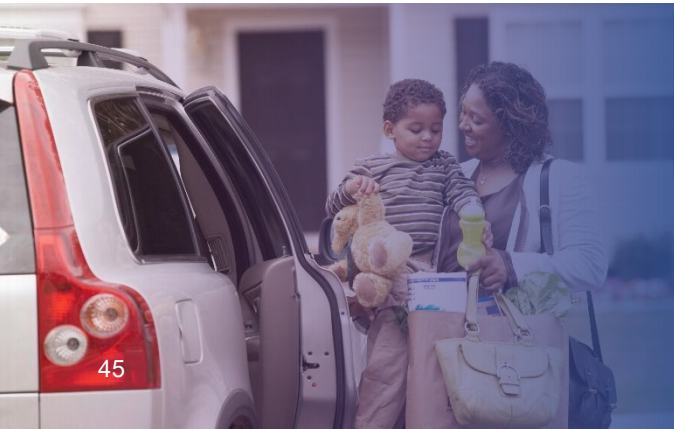
66% on Audio

63% on Display

58% on Video

Experian Audience Segment Names

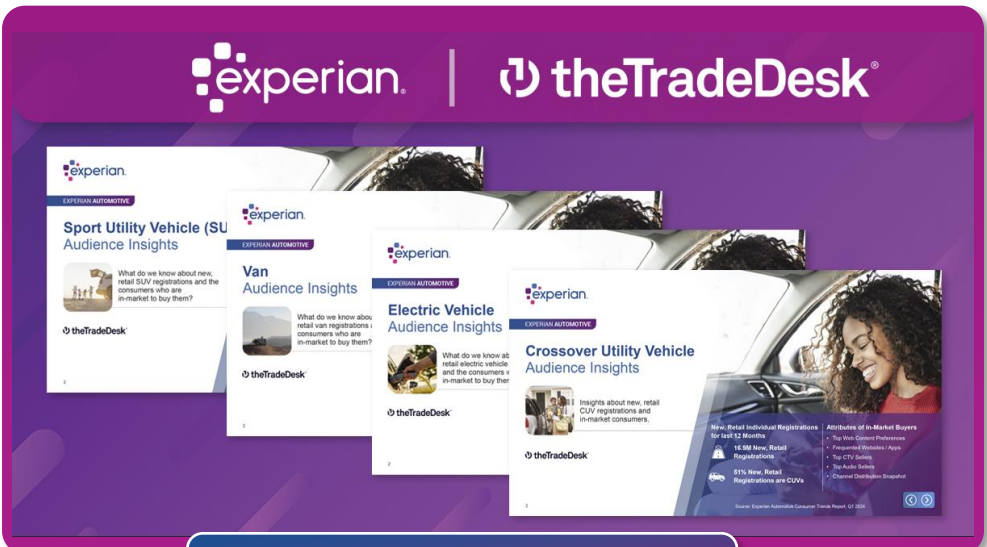
- Autos, Cars and Trucks > In Market-Fuel Types > Electric and Used Electric





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

Save the date



SAVE THE DATE:
December 2026



AUTOMOTIVE CONSUMER
TRENDS REPORT:

Q3 2026
Pickup Trucks





Automotive Consumer Trends

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**Automotive Consumer
Trends Report**



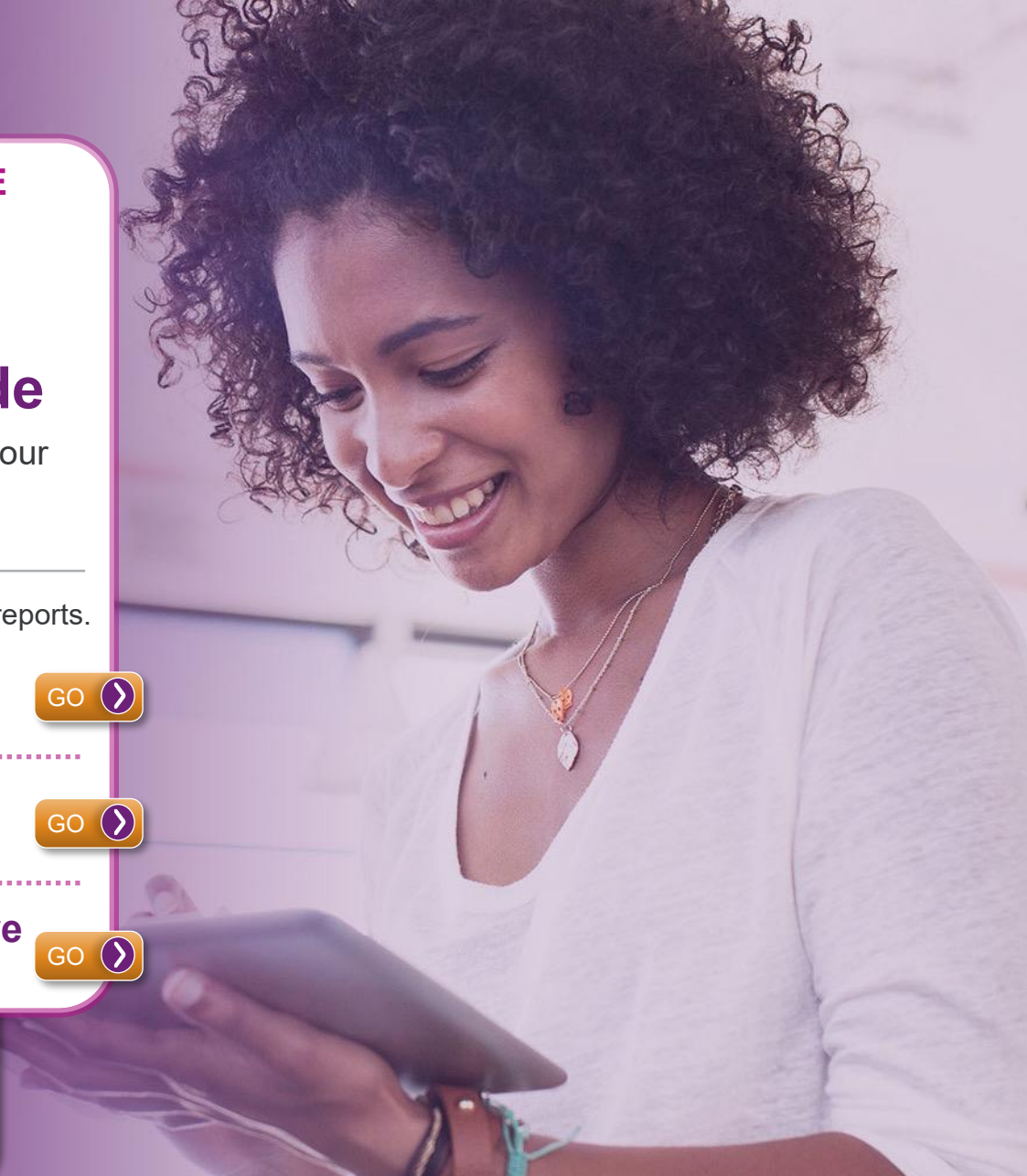
**Automotive Market
Trends Report**



**State of the Automotive
Finance Market Report**



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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 dashboard. The background shows a blurred green landscape.

Experian Automotive

Thank You!

