

# San Diego Auto Outlook

Comprehensive information on the San Diego County new vehicle market



**NEW CAR DEALERS ASSOCIATION SAN DIEGO COUNTY**

## FORECAST

### County New Vehicle Market Increased in 1Q '24

Below is a review of key trends in the San Diego County new vehicle market.

#### Results during 1Q 2024

County new light vehicle registrations increased 4.6% during the first three months of 2024 vs. year-earlier levels. National retail market was up 6.9%. As shown on page 2, equivalent U.S. SAAR levels remained at 15 million units in the First Quarter of this year.

#### 2024 Forecast

According to Auto Outlook's forecast, registrations are expected to approach 150,000 units this year and increase 3.6% from 2023. That projection is 12% higher than the total in 2022 when the market was significantly impacted by product shortages, but is still below the recent high of 159,567 units in 2017.

#### Key determinants for the market

The shaded box on the right reviews the primary forecast determinants. Pent-up demand is still significant and the county labor market is strong. Vehicle affordability is still a concern, but should improve as the year progresses. As pointed out in the previous release of *Auto Outlook*, barring any

unforeseen negative shocks (such as the possible escalation of conflict in the Middle East), we think the new vehicle market could be stronger than expected in 2024.

#### Tracking alternative powertrain sales

County BEV registrations were up 14% in the First Quarter of this year versus a year earlier, and market share increased to 22.5%. Gains have levelled off during the past few quarters, however. Hybrid registrations exceeded 5,300 units in 1Q '24 and improved 52% versus year earlier. Plug in hybrid market was up 25% (see page 6).

#### Brands that fared best in early 2024

Among the top 25 sellers in the county market, Lexus, Rivian, Toyota, Honda, and Audi had the largest percentage gains in the First Quarter of this year. Toyota, Tesla, Honda, Ford, and Chevrolet were market share leaders.

#### Top selling models in San Diego County

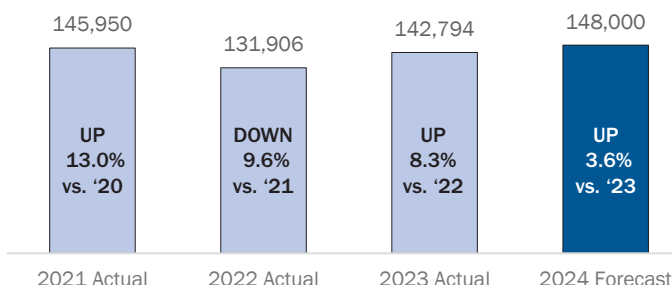
Tesla Model Y, Toyota RAV4, Honda CR-V, Tesla Model 3, Honda Civic, Toyota Camry, Toyota Corolla, Chevrolet Silverado, Ford F-Series, and Honda Accord were the top 10 sellers so far this year.



#### Primary Factors Driving the County New Vehicle Market

- » County unemployment rate was 4.7% in February and total employment exceeded pre-pandemic levels.
- » Growth in personal income has largely kept pace with inflation. Household wealth is at record-high levels.
- » Consumer confidence has fluctuated a bit over the past few months, but is well above the lows in 2022 when inflation concerns were paramount.
- » High interest rates continue to put a squeeze on affordability, but the prospects for lower rates later this year, falling vehicle prices, and strong wage gains should lead to improvement in the second half of 2024.
- » Pent up demand is the biggest positive for the county market. Auto Outlook estimates that nearly 50,000 new vehicle purchases have been postponed since the onset of the pandemic and ensuing supply chain issues.

### Forecast for County New Retail Light Vehicle Registrations



### Market Summary

	YTD '23 thru Mar.	YTD '24 thru Mar.	% Chg. '23 to '24	Mkt. Share YTD '24
TOTAL	34,011	35,561	4.6%	
Car	9,521	9,231	-3.0%	26.0%
Light Truck	24,490	26,330	7.5%	74.0%
Domestic	12,044	12,045	0.0%	33.9%
European	5,222	5,176	-0.9%	14.6%
Japanese	13,311	14,971	12.5%	42.1%
Korean	3,434	3,369	-1.9%	9.5%

The graph above shows annual new retail light vehicle registrations from 2021 through 2023 and Auto Outlook's projection for 2024. Historical data sourced from Experian Automotive.

Domestics consist of vehicles sold by GM, Ford, Stellantis (excluding Alfa Romeo and FIAT), Tesla, Rivian, and Lucid. Data sourced from Experian Automotive.

# KEY TRENDS IN SAN DIEGO COUNTY NEW VEHICLE MARKET



## COUNTY MARKET VS. U.S.

**% Change In  
New Retail Market  
YTD 2024 thru March  
vs.  
YTD 2023**

**San Diego County**

**UP 4.6%**

**U.S.**

**UP 6.9%**

New retail light vehicle registrations in the county increased 4.6% during the first three months of this year vs. year earlier, just below the 6.9% improvement in the Nation.

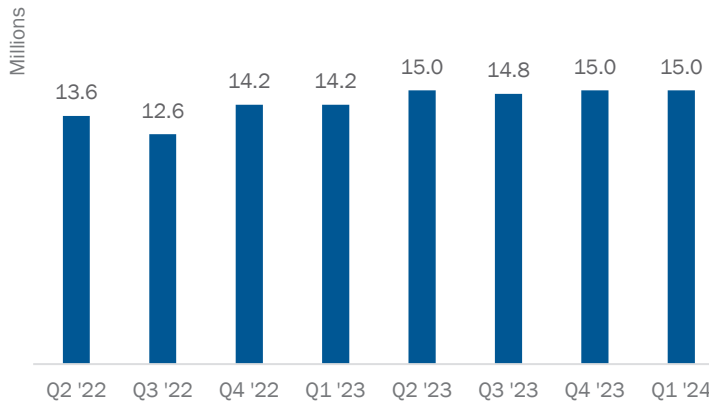
Data sourced from Experian Automotive.



## QUARTERLY RESULTS

### San Diego County Quarterly Registrations

**Seasonally Adjusted  
Annual Rate, Converted  
to Equivalent U.S. New  
Vehicle Market SAAR  
(millions of units)**



The graph on the left provides an easily recognizable way to gauge the strength of the county market. It shows quarterly registrations based on a seasonally adjusted annual rate. These figures are then indexed to SAAR sales figures for the U.S. new vehicle market. So just like in the national market, when the quarterly SAAR is above 17 million units, the county market is strong, 15 million is about average, and below 13 million is weak. Equivalent SAAR levels in the county were 15.0 million units in the First Quarter of this year, unchanged from 4Q '23.

Data sourced from Experian Automotive. SAAR estimates: Auto Outlook.

**% Change in  
registrations vs.  
previous quarter  
(1Q '24 vs. 4Q '23)**

**DOWN  
0.2%**

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### San Diego Auto Outlook

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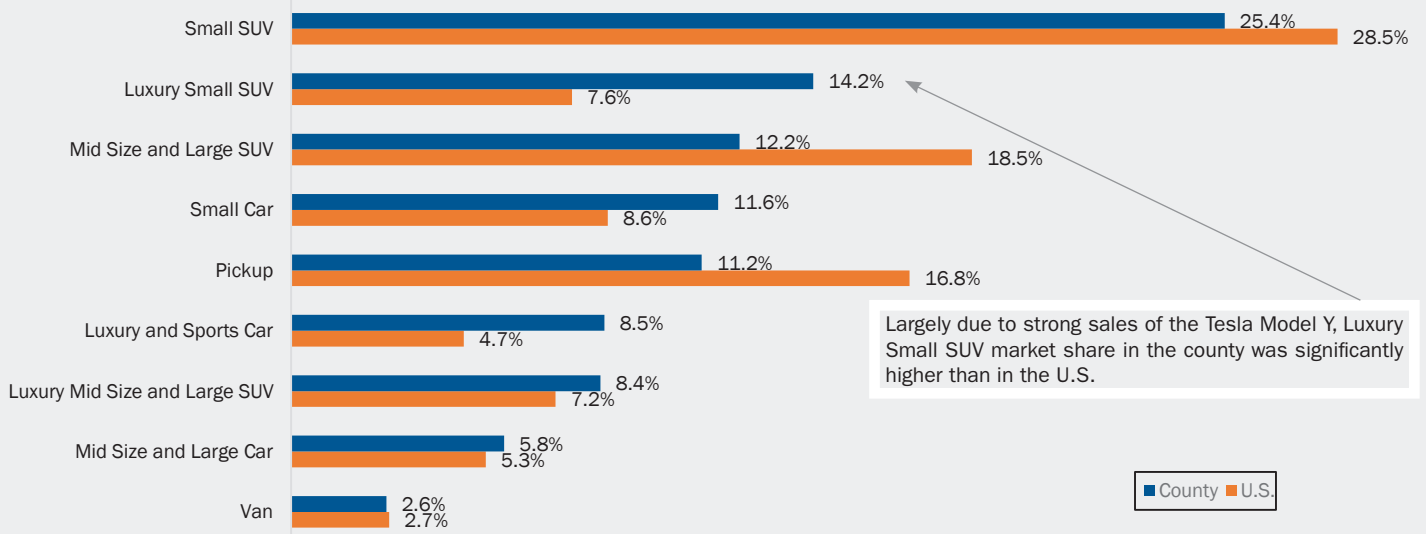
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# KEY TRENDS IN SAN DIEGO COUNTY NEW VEHICLE MARKET



## PRIMARY MARKET SEGMENTS - COUNTY AND U.S.

Segment Market Shares in County and U.S. - YTD 2024 thru March



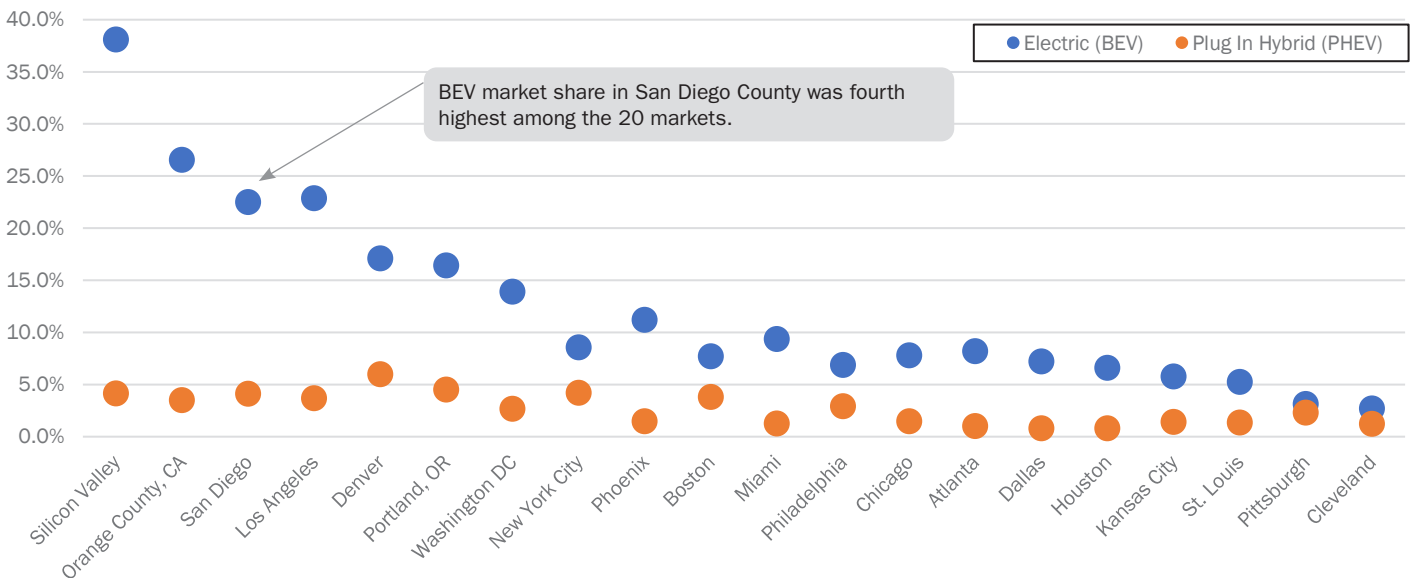
The graph above shows market shares for nine primary segments in both the county and U.S. markets. County market share is represented by the blue bars. Orange shaded bars show U.S. Data sourced from Experian Automotive.



COMPARE

## COMPARISON OF METRO AREA MARKETS

BEV and PHEV Share in Selected Metro Area Markets - YTD 2024 thru March



Markets are shown from left (highest) to right (lowest) based on combined BEV and PHEV market share. Data sourced from Experian Automotive.

# BRANDS AND MODELS

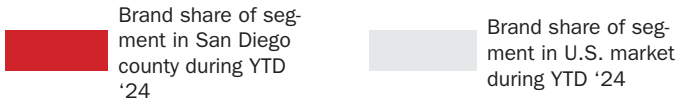


## TOP SELLING BRANDS IN 7 PRIMARY SEGMENTS

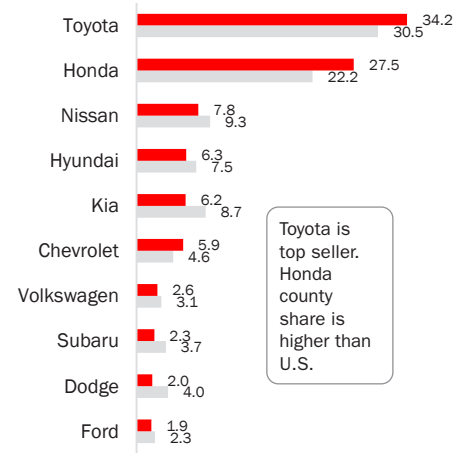
The seven graphs on this page show brand market share in seven key segments during the first three months of 2024 in both the San Diego County and U.S. markets. County percent share is depicted by the red bars, U.S. share is light gray. Top ten brands in each segment are ranked from top to bottom based on San Diego County share.

Segments were defined based on model classifications instead of overall brand positioning. For instance, Chevrolet appears on the Luxury and Sports cars graph because of the Corvette. Small SUVs consists of both Sub Compact and Compact models.

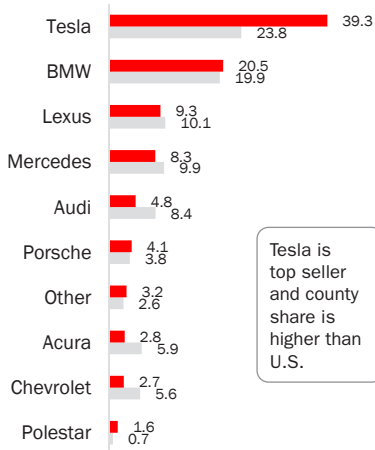
### Legend for all graphs



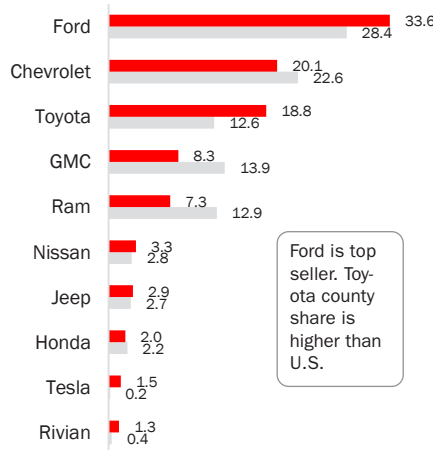
### Non Luxury Cars



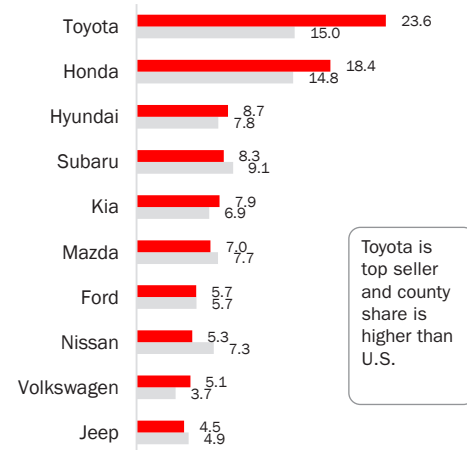
### Luxury and Sports Cars



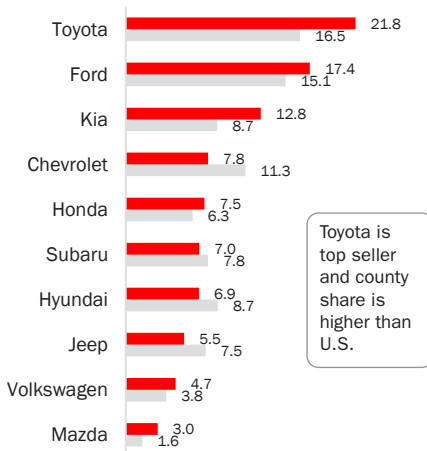
### Pickups



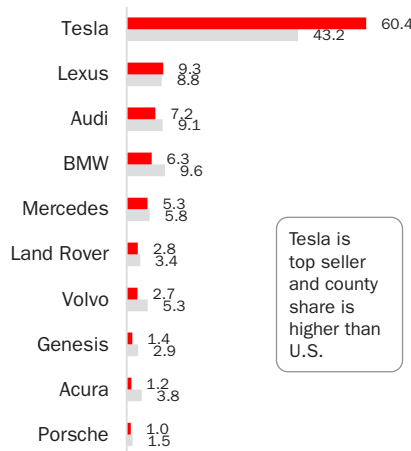
### Small Non Luxury SUVs



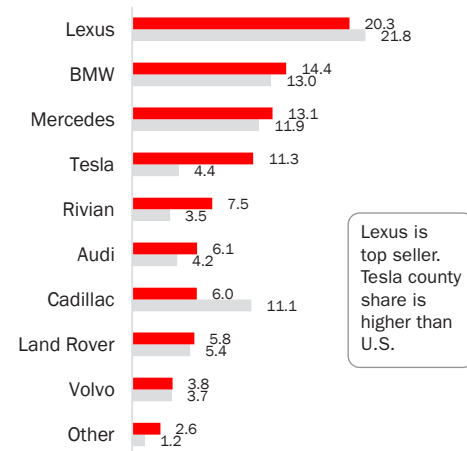
### Mid and Full Size Non Luxury SUVs



### Small Luxury SUVs



### Mid and Full Size Luxury SUVs



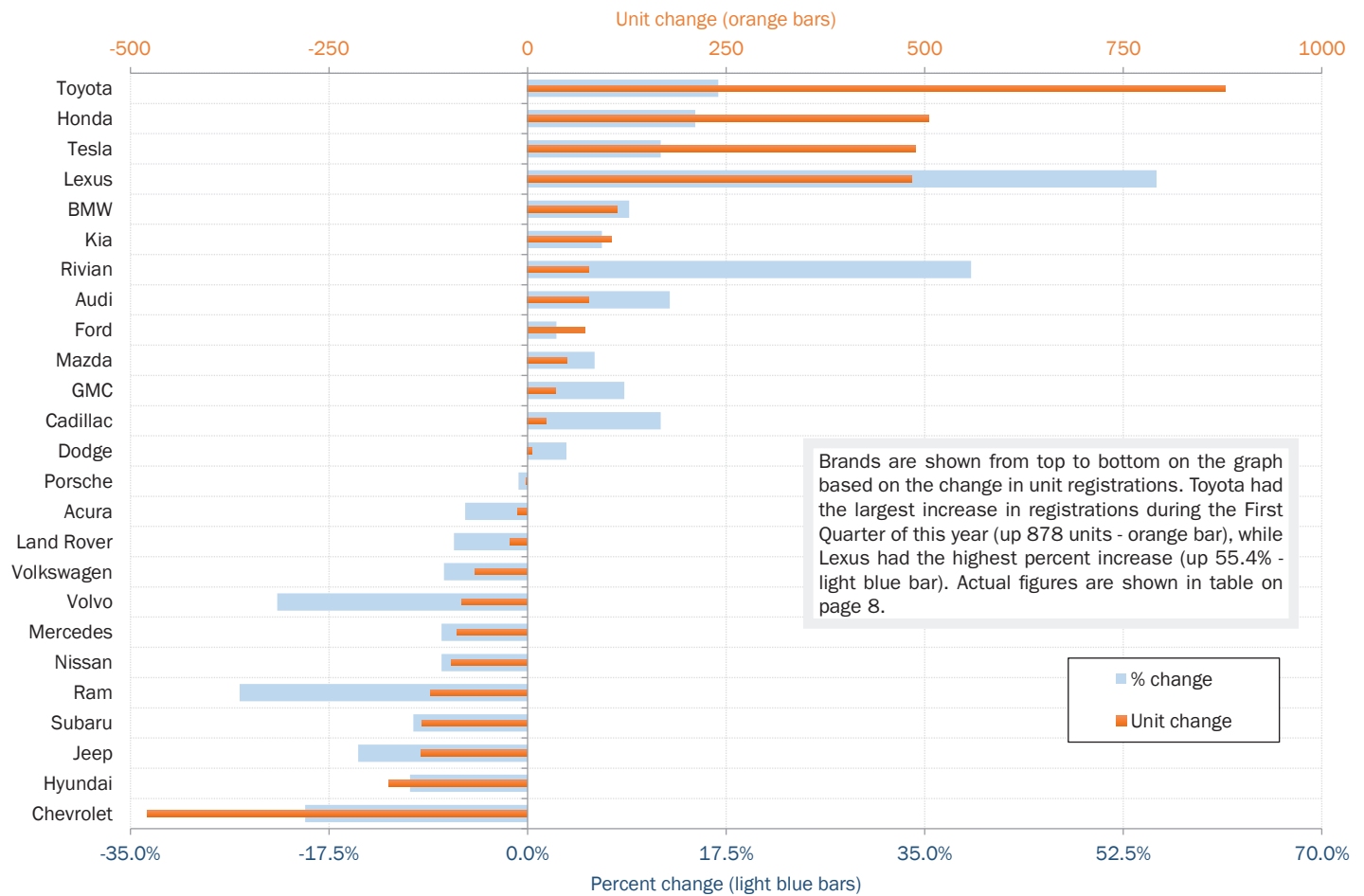
# BRANDS AND MODELS



## WINNERS AND LOSERS

The graph below shows both the percent and unit change in registrations during the First Quarter of this year versus year earlier. Comparing the percent change in registrations is helpful for establishing the relative change in results, but it can be misleading since it doesn't take into account the absolute level of registrations. As shown below, Rivian posted a big percentage improvement in the First Quarter (up 39.1%, blue bar) but the unit increase was relatively small (up by 77 units). Toyota's percentage increase was smaller than Rivian (up 16.9%), but the unit total improved by 878 units.

**Percent and Unit Change in New Retail Light Vehicle Registrations for Top 25 Selling Brands - YTD '24 thru Mar. vs. YTD '23**



Brands are shown from top to bottom on the graph based on the change in unit registrations. Toyota had the largest increase in registrations during the First Quarter of this year (up 878 units - orange bar), while Lexus had the highest percent increase (up 55.4% - light blue bar). Actual figures are shown in table on page 8.

■ % change  
■ Unit change

Data sourced from Experian Automotive.



## TOP SELLING MODELS

**Top 20 Selling Models during YTD '24 thru March - Market Share and % Change in Registrations vs. YTD '23**

Rank	Model	Area Share %	% chg. '23 to '24	Rank	Model	Area Share %	% chg. '23 to '24
1	Tesla Model Y	8.6	16.5	11	Honda HR-V	1.5	4.2
2	Toyota RAV4	5.1	55.6	12	Ford Maverick	1.3	82.2
3	Honda CR-V	3.2	63.4	13	Lexus NX	1.1	66.7
4	Tesla Model 3	3.1	-14.7	14	Subaru Crosstrek	1.1	-17.9
5	Honda Civic	3.0	19.5	15	Toyota Tacoma	1.1	-59.1
6	Toyota Camry	2.6	29.5	16	Toyota Tundra	1.0	52.9
7	Toyota Corolla	2.2	7.1	17	Jeep Wrangler	1.0	0.0
8	Chevrolet Silverado	2.1	-2.5	18	Lexus RX	1.0	39.0
9	Ford F-Series	1.9	-8.6	19	Toyota 4Runner	1.0	90.3
10	Honda Accord	1.7	-18.1	20	Tesla Model X	1.0	71.2

Table on the left presents the top 20 selling models in the county during the first three months of this year. Share of industry registrations and the percent change versus the same period a year earlier is also shown. Models with the five largest percentage increase are shaded blue.

Data sourced from Experian Automotive.

## ALTERNATIVE POWERTRAIN MARKET

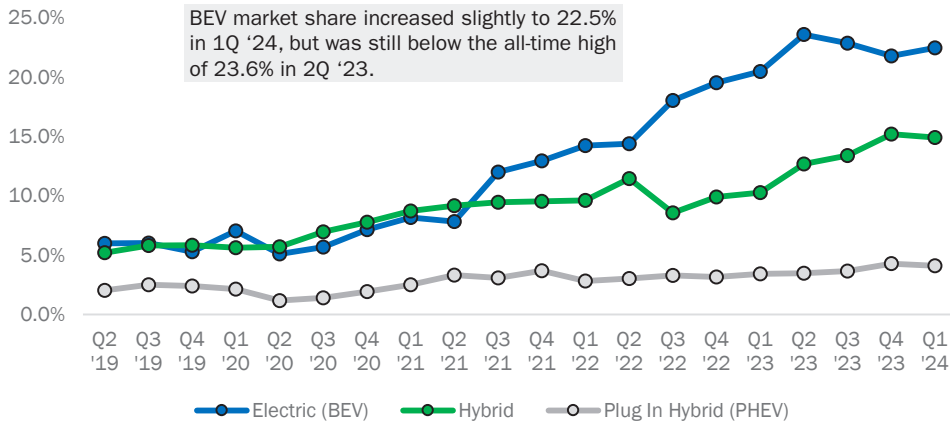
### FIVE KEY TRENDS

- 1.** BEV share increased from 20.5% in 1Q '23 to 22.5% in 1Q '24.
- 2.** BEV registrations increased by 5.2% from 4Q '23 to 1Q '24.
- 3.** Franchised dealer share of BEV market was 36.8% in 1Q '24 vs. 36.3% a year earlier.
- 4.** Hybrid registrations increased 52% so far this year. Plug ins were up 25%.
- 5.** Hybrid registrations increased for each of the top five selling brands.



### BEV, PHEV, AND HYBRID MARKET SHARE

Percent Share of Industry Registrations by Powertrain Type



YTD thru March		
	YTD '23	YTD '24
Electric (BEV)	20.5%	22.5% ↑
Hybrid	10.3%	14.9% ↑
Plug In Hybrid (PHEV)	3.4%	4.1% ↑

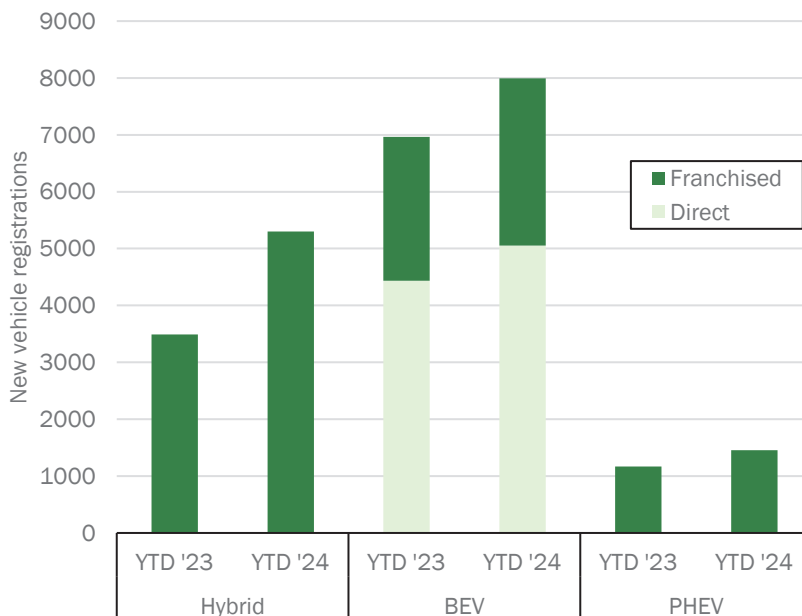
Quarterly		
	4Q '23	1Q '24
Electric (BEV)	21.8%	22.5% ↑
Hybrid	15.2%	14.9% ↓
Plug In Hybrid (PHEV)	4.3%	4.1% ↓

Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.



### FRANCHISED DEALERSHIPS AND DIRECT SELLERS

New Hybrid, BEV, and PHEV Registrations in San Diego County by Type of Selling Dealership



BEV Registrations and Market Share		
	Franchised Dealerships	Direct Sellers
YTD '23 thru Mar.	2,530	4,433
YTD '24 thru Mar.	2,940	5,055
% change	16.2%	14.0%
YTD '23 mkt. share %	36.3	63.7
YTD '24 mkt. share %	36.8	63.2
change	0.5	-0.5
4Q '23 registrations	2,986	4,612
1Q '24 registrations	2,940	5,055
% change	-1.5%	9.6%
4Q '23 registrations	39.3	60.7
1Q '24 registrations	36.8	63.2
change	-2.5	2.5

As illustrated on the graph, franchised dealerships accounted for 66% of the combined Hybrid, BEV, and PHEV market. Franchised dealer share of the BEV market increased slightly from 36.6% in 1Q '23 to 36.8% in 1Q '24.

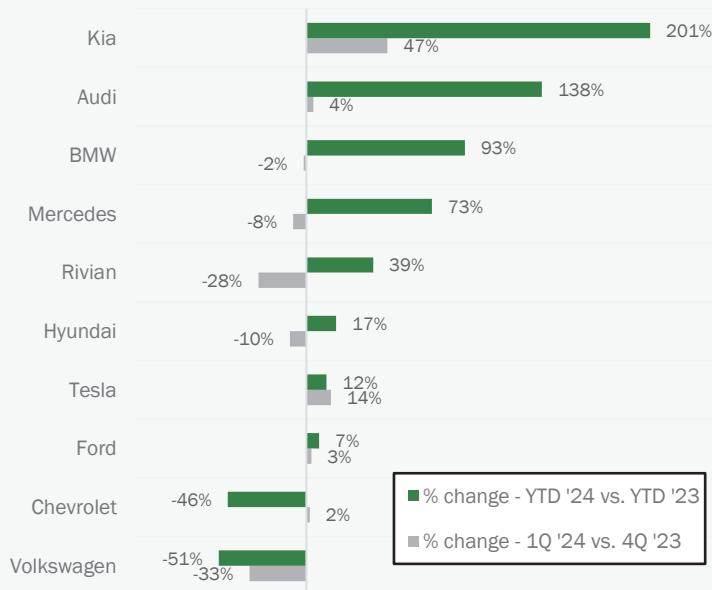
Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

# ALTERNATIVE POWERTRAIN MARKET

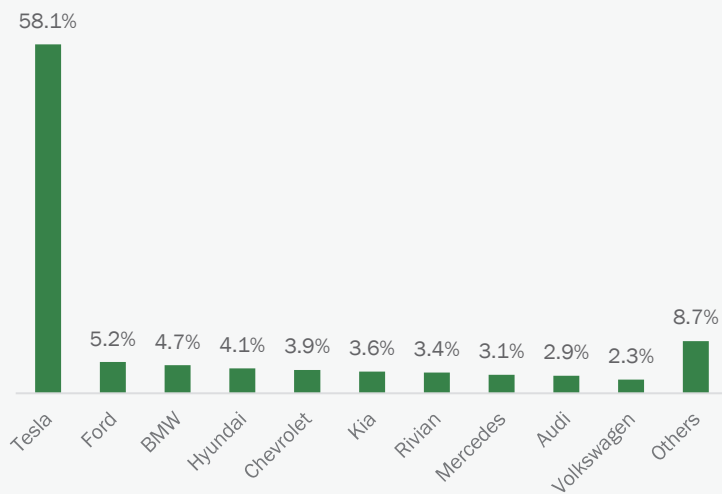


## MAKES AND MODELS

**% Change in BEV Registrations for Top 10 Brands  
YTD '24 thru Mar. vs. YTD '23 and 1Q '24 vs. 4Q '23**



**Brand Share of San Diego County BEV Market (%)  
YTD '24 thru March**



### Observations

- » Kia had the largest % increase in BEV registrations in the First Quarter of this year versus year earlier (up 201%).
- » BEV registrations declined from 4Q '23 to 1Q '24 for five of the top 10 selling brands.
- » Tesla share of the BEV market was 58.1% in 1Q '24.

Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

**Top Five Brands by type of Powertrain  
Registrations for YTD '23 and '24 thru March**

	Rank	Brand	YTD '23 Regs.	YTD '24 Regs.	% chg.	YTD '24 Share
<b>BEV</b>	1	Tesla	4,156	4,644	11.7%	58.1%
	2	Ford	387	416	7.5%	5.2%
	3	BMW	193	372	92.7%	4.7%
	4	Hyundai	282	331	17.4%	4.1%
	5	Chevrolet	575	311	-45.9%	3.9%
<b>PHEV</b>	1	Toyota	192	377	96.4%	25.9%
	2	Jeep	257	323	25.7%	22.2%
	3	Volvo	124	151	21.8%	10.4%
	4	Lexus	40	145	262.5%	10.0%
	5	BMW	242	100	-58.7%	6.9%
<b>HYBRID</b>	1	Toyota	1,374	2,548	85.4%	48.1%
	2	Honda	594	981	65.2%	18.5%
	3	Lexus	375	603	60.8%	11.4%
	4	Ford	332	517	55.7%	9.8%
	5	Hyundai	432	340	-21.3%	6.4%

**Market Share for Top 15 Selling  
BEVs, PHEVs, and Hybrids - YTD '24 thru March**

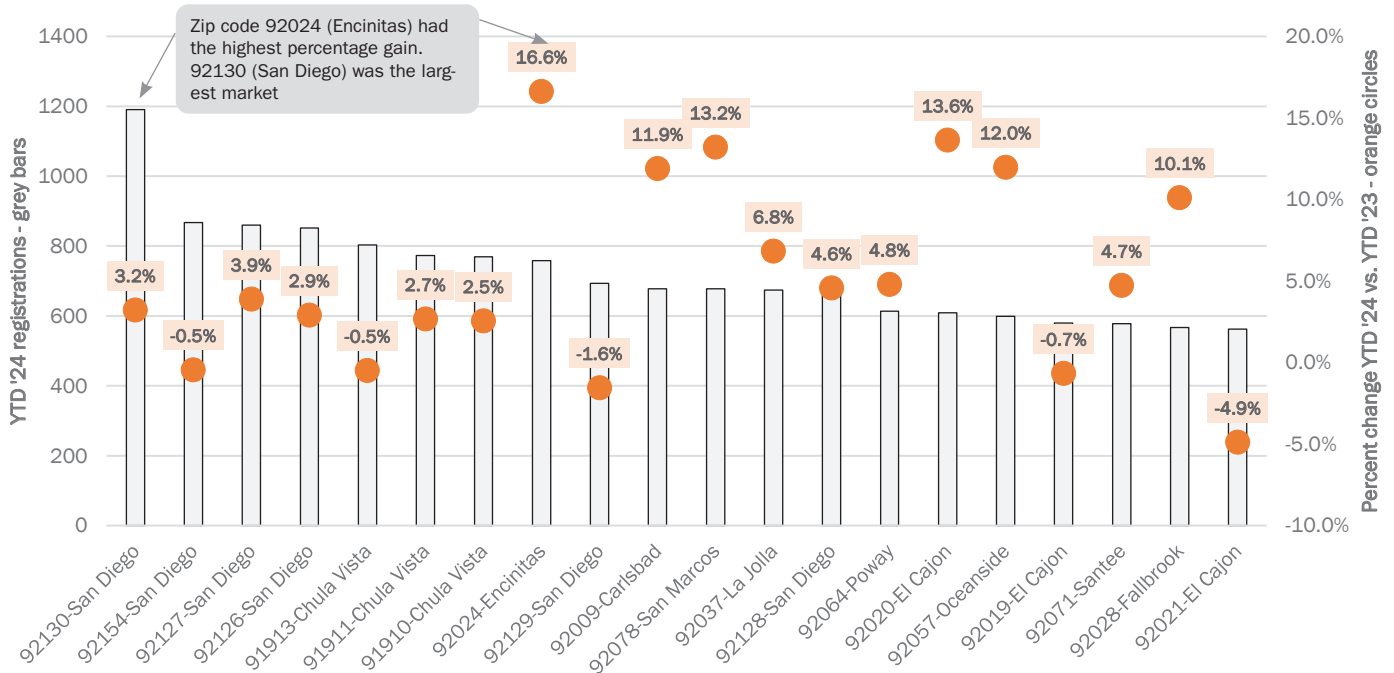
Rank	Model	Type	YTD '24 Share
1	Tesla Model Y	BEV	20.7%
2	Tesla Model 3	BEV	7.4%
3	Toyota RAV4	Hybrid	6.5%
4	Honda CR-V	Hybrid	4.3%
5	Ford Maverick	Hybrid	2.6%
6	Toyota Corolla	Hybrid	2.5%
7	Honda Accord	Hybrid	2.4%
8	Tesla Model X	BEV	2.3%
9	Chevrolet Bolt	BEV	2.1%
10	Toyota RAV4	PHEV	1.7%
11	Jeep Wrangler	PHEV	1.7%
12	Toyota Camry	Hybrid	1.7%
13	Rivian R1S	BEV	1.5%
14	Ford Mustang Mach-E	BEV	1.5%
15	Lexus NX	Hybrid	1.5%

ZIP CODE MARKETS

92024 (Encinitas) Had Largest Percentage Gain

The graphs and tables on these two pages show specific data on the top 20 zip code markets in San Diego County. The figures represent new vehicles registered to retail customers residing in each of the zip codes, and includes both purchase and lease transactions.

Zip Code New Retail Light Vehicle Registrations - YTD '24 thru March and Percent Change vs. YTD '23



The graph above shows new vehicle registrations during the first three months of 2024 (grey bars and left axis) and percent change vs. the same period a year earlier (orange circles with labels and right axis). Data sourced from Experian Automotive.

ZIP CODE MARKETS REVIEW									
	Industry Registrations			Battery Electric Vehicle Market Share (%)			Luxury Brand Market Share (%)		
	YTD '23 thru Mar.	YTD '24 thru Mar.	% change '24 vs. '23	YTD '23 thru Mar.	YTD '24 thru Mar.	change '24 vs. '23	YTD '23 thru Mar.	YTD '24 thru Mar.	change '24 vs. '23
91910-Chula Vista	750	769	2.5%	10.8	15.0	4.2	20.3	20.9	0.6
91911-Chula Vista	753	773	2.7%	8.5	9.4	0.9	14.6	13.3	-1.3
91913-Chula Vista	807	803	-0.5%	23.3	24.2	0.9	37.3	33.9	-3.4
92009-Carlsbad	606	678	11.9%	29.4	32.4	3.0	45.9	50.0	4.1
92019-El Cajon	584	580	-0.7%	16.1	20.2	4.1	34.4	36.7	2.3
92020-El Cajon	536	609	13.6%	8.8	15.3	6.5	18.7	24.0	5.3
92021-El Cajon	591	562	-4.9%	8.3	11.2	2.9	14.9	17.1	2.2
92024-Encinitas	650	758	16.6%	28.3	29.6	1.3	39.8	40.4	0.6
92028-Fallbrook	515	567	10.1%	17.9	19.8	1.9	27.4	30.3	2.9
92037-La Jolla	631	674	6.8%	30.6	36.1	5.5	58.6	61.9	3.3
92057-Oceanside	535	599	12.0%	19.4	18.4	-1.0	21.7	23.7	2.0
92064-Poway	586	614	4.8%	25.6	26.1	0.5	32.3	33.7	1.4
92071-Santee	552	578	4.7%	14.3	19.0	4.7	17.8	24.9	7.1
92078-San Marcos	599	678	13.2%	26.4	29.9	3.5	33.1	40.1	7.0
92126-San Diego	828	852	2.9%	32.0	28.4	-3.6	36.1	35.6	-0.5
92127-San Diego	828	860	3.9%	44.0	39.4	-4.6	58.0	56.6	-1.4
92128-San Diego	637	666	4.6%	32.2	29.9	-2.3	38.8	38.4	-0.4
92129-San Diego	704	693	-1.6%	40.1	37.4	-2.7	42.0	45.6	3.6
92130-San Diego	1,154	1,191	3.2%	42.3	43.1	0.8	58.1	61.0	2.9
92154-San Diego	871	867	-0.5%	8.8	12.3	3.5	17.8	17.0	-0.8

Data sourced from Experian Automotive.



ZIP CODE MARKETS

# BEV Market Share Exceeded 30% in Five Zip Codes

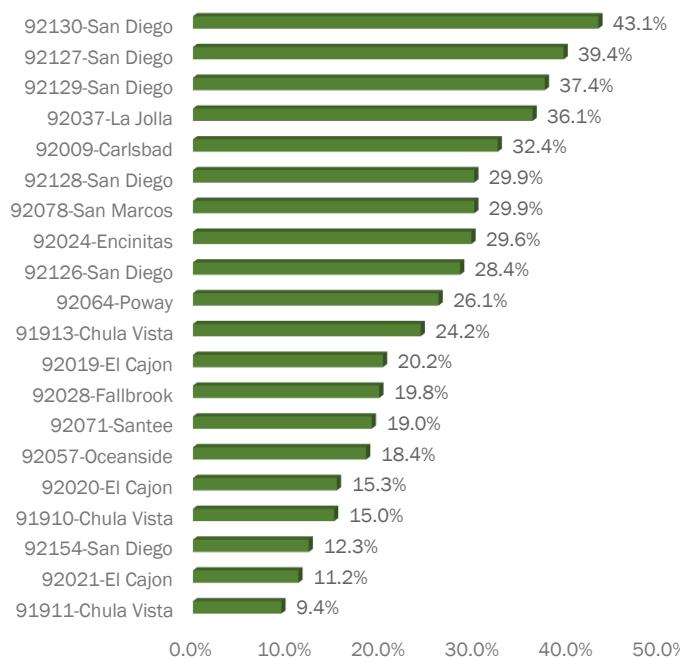
Brand Market Share - YTD '24 thru March (for top 10 selling brands in county market)

Zip Code	Toyota	Tesla	Honda	Ford	Kia	Chevrolet	BMW	Lexus	Hyundai	Mercedes
91910-Chula Vista	15.7	8.8	17.2	7.7	5.1	4.8	2.0	2.7	4.7	2.9
91911-Chula Vista	17.2	5.4	18.0	9.1	6.5	4.9	1.2	2.2	2.8	1.7
91913-Chula Vista	17.9	16.2	11.5	5.2	6.1	5.7	4.2	4.6	3.2	3.4
92009-Carlsbad	13.9	17.4	5.9	6.8	3.5	3.1	6.6	6.3	3.8	3.7
92019-El Cajon	16.2	9.5	9.0	9.1	2.9	7.9	7.2	3.8	4.7	9.0
92020-El Cajon	19.5	7.7	13.3	9.4	5.7	7.6	5.3	2.0	3.9	4.1
92021-El Cajon	22.6	6.6	15.5	8.4	6.0	8.5	2.3	2.0	5.3	2.0
92024-Encinitas	17.2	16.2	6.3	8.7	4.9	3.7	3.7	3.7	2.4	3.8
92028-Fallbrook	17.3	14.5	8.6	10.9	3.7	5.6	2.3	3.9	5.8	2.6
92037-La Jolla	10.4	19.0	3.0	3.4	3.0	2.4	7.1	5.2	3.6	8.3
92057-Oceanside	22.5	10.2	11.0	7.3	5.2	6.3	2.3	3.7	4.0	2.3
92064-Poway	15.6	13.8	11.6	8.8	3.9	7.2	4.2	5.5	5.4	2.1
92071-Santee	17.0	10.9	12.1	10.4	5.7	7.6	3.5	3.3	5.5	1.9
92078-San Marcos	13.4	19.2	9.3	9.1	4.7	3.8	2.8	4.4	3.4	3.4
92126-San Diego	20.4	21.2	13.3	4.8	5.0	3.9	2.2	4.5	5.6	3.1
92127-San Diego	9.1	25.6	6.6	4.9	4.1	2.1	7.3	6.2	3.7	4.4
92128-San Diego	16.1	18.2	10.2	5.1	4.8	3.9	3.2	6.6	5.6	2.0
92129-San Diego	16.0	25.4	11.1	4.2	4.5	3.8	4.0	5.1	3.8	3.2
92130-San Diego	10.3	28.8	5.3	3.9	3.1	1.7	8.5	5.7	4.0	4.4
92154-San Diego	21.5	6.1	12.5	9.0	6.9	5.3	2.9	1.4	3.3	2.1

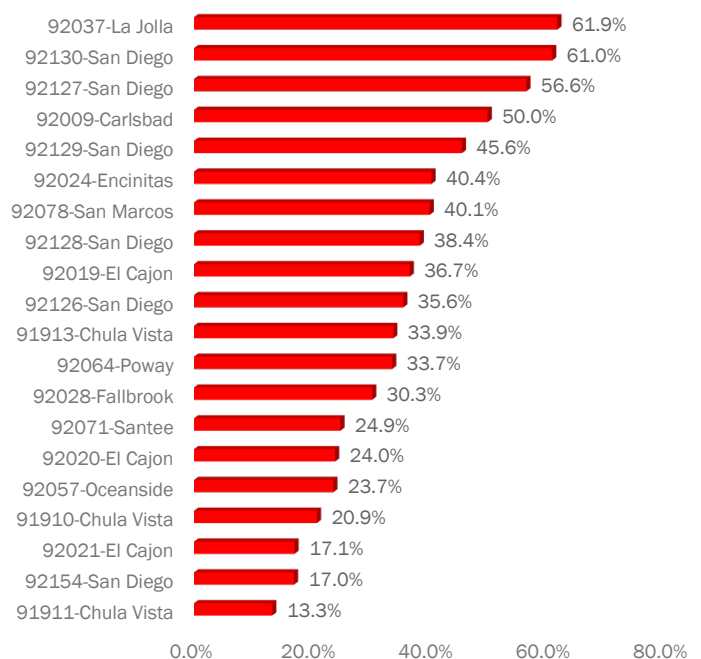
The table above shows brand market shares in each of the top 20 zip code markets. (Includes top ten selling brands in the county.) Highest market share for each brand is shaded grey. Data sourced from Experian Automotive.



## Battery Electric Vehicle Market Share YTD '24 thru March



## Luxury Brand Market Share YTD '24 thru March



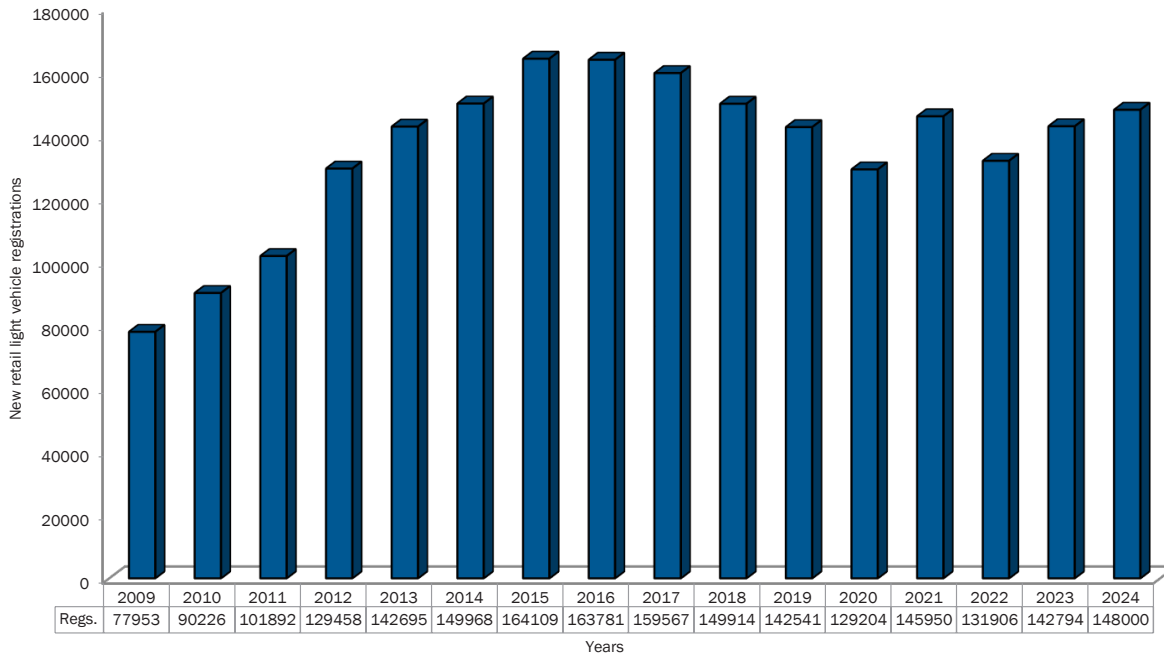
Data sourced from Experian Automotive.

LONG TERM TRENDS

# New Vehicle Registrations in 2024 Should Approach 2018 Levels











The graph below provides a long term perspective of new vehicle registrations in the San Diego County market. The table below shows key trends.

County New Retail Light Vehicle Registrations - 2009 thru 2023, 2024 Forecast



**County market improved in 2023 as supply chain issues eased. Registrations reached 142,794 units last year and increased by 4.6% from 2022. Auto Outlook is predicting an increase of at least 3.6% this year.**

## Key Trends in San Diego County Market - 2018 to 2023

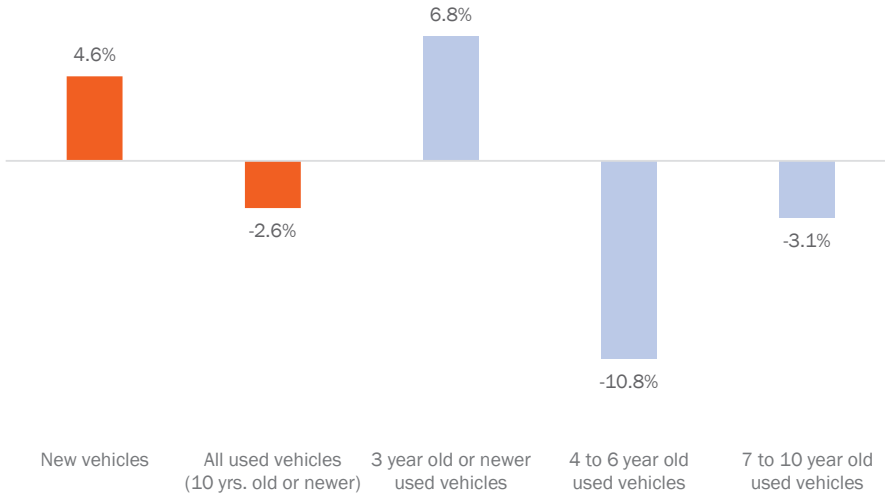
	2018	2023	Change
 Light truck market share	57.7%	71.5%	UP 13.8 points 
 Domestic brand market share	27.8%	35.3%	UP 7.5 points 
 Area new retail vehicle registrations	149,914	142,794	DOWN 4.7% 
 U.S. new retail vehicle registrations	13,846,381	12,364,280	DOWN 10.7% 
 Battery electric vehicle market share	4.7%	22.2%	UP 17.5 points 

Data sourced from Experian Automotive.

**SAN DIEGO COUNTY USED VEHICLE MARKET**

**County Used Vehicle Market Declined in First Quarter of 2024**

**Percent Change in New and Used Vehicle Registrations  
YTD 2024 thru March vs. YTD 2023**



**THREE KEY TRENDS IN USED VEHICLE MARKET**



**01.**

The county used vehicle market fell by 2.6% during the first three months of this year versus year earlier. The new vehicle market improved by 4.6% during the same period.

**02.**

County used light vehicle market is expected to be flat in 2024 as tight supplies continue to hold back sales.

**03.**

As shown on the graph to the left, the three year old or newer market was up so far this year, but the increase was primarily attributable to weak new vehicle sales in 2020. Three year old or newer vehicles this year consists of model years 2021 or newer. Last year, it included vehicles from the 2020 model year when new vehicle sales were held back by the pandemic.

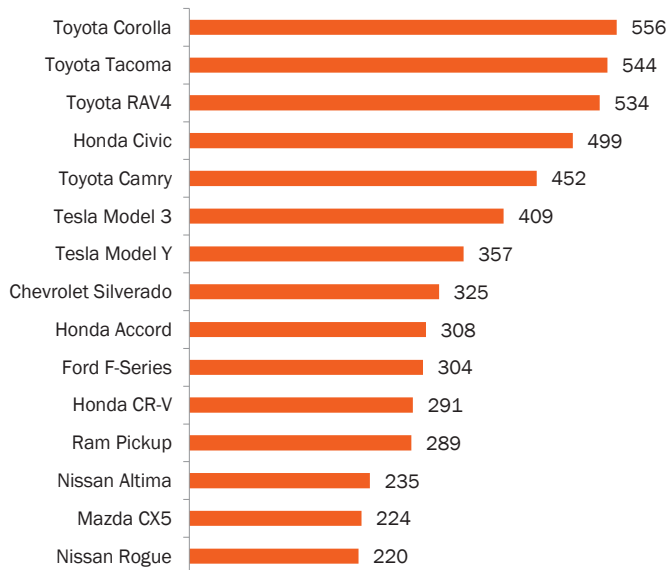
Data sourced from Experian Automotive.

**TOP SELLING MODELS IN USED VEHICLE MARKET**

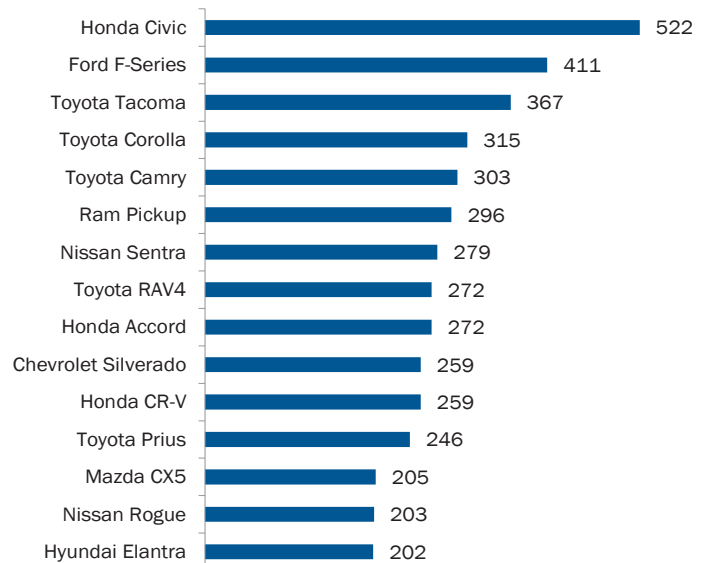
**Corolla and Civic Are Top Sellers in County Used Vehicle Market**

The two graphs below show the top 15 selling models in San Diego County for two age classifications: vehicles 4 years old or newer, and 5 to 8 year old vehicles.

**Top 15 Selling Models for Vehicles 4 years Old or Newer  
YTD 2024 thru March**



**Top 15 Selling Models for 5 to 8 Year Old Vehicles  
YTD 2024 thru March**



Data sourced from Experian Automotive.

Brand Registrations Report												
San Diego County New Retail Car and Light Truck Registrations												
	First Quarter						Annual Totals					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	1Q '23	1Q '24	% change	1Q '23	1Q '24	Change	2022	2023	% change	2022	2023	Change
TOTAL	34,011	35,561	4.6				131,906	142,794	8.3			
Cars	9,521	9,231	-3.0	28.0	26.0	-2.0	38,336	40,645	6.0	29.1	28.5	-0.6
Light Trucks	24,490	26,330	7.5	72.0	74.0	2.0	93,570	102,149	9.2	70.9	71.5	0.6
Domestic Brands	12,044	12,045	0.0	35.4	33.9	-1.5	43,889	50,342	14.7	33.3	35.3	2.0
European Brands	5,222	5,176	-0.9	15.4	14.6	-0.8	20,413	20,056	-1.7	15.5	14.0	-1.5
Japanese Brands	13,311	14,971	12.5	39.1	42.1	3.0	53,445	58,084	8.7	40.5	40.7	0.2
Korean Brands	3,434	3,369	-1.9	10.1	9.5	-0.6	14,159	14,312	1.1	10.7	10.0	-0.7
Acura	218	206	-5.5	0.6	0.6	0.0	894	930	4.0	0.7	0.7	0.0
Alfa Romeo	22	21	-4.5	0.1	0.1	0.0	93	82	-11.8	0.1	0.1	0.0
Audi	614	691	12.5	1.8	1.9	0.1	2,266	2,613	15.3	1.7	1.8	0.1
BMW	1,261	1,374	9.0	3.7	3.9	0.2	4,936	5,067	2.7	3.7	3.5	-0.2
Buick	52	48	-7.7	0.2	0.1	-0.1	161	252	56.5	0.1	0.2	0.1
Cadillac	196	219	11.7	0.6	0.6	0.0	644	744	15.5	0.5	0.5	0.0
Chevrolet	2,444	1,965	-19.6	7.2	5.5	-1.7	8,455	9,021	6.7	6.4	6.3	-0.1
Chrysler	77	75	-2.6	0.2	0.2	0.0	339	364	7.4	0.3	0.3	0.0
Dodge	146	151	3.4	0.4	0.4	0.0	675	655	-3.0	0.5	0.5	0.0
Ford	2,833	2,905	2.5	8.3	8.2	-0.1	10,746	10,766	0.2	8.1	7.5	-0.6
Genesis	129	109	-15.5	0.4	0.3	-0.1	519	557	7.3	0.4	0.4	0.0
GMC	411	446	8.5	1.2	1.3	0.1	1,642	1,751	6.6	1.2	1.2	0.0
Honda	3,420	3,925	14.8	10.1	11.0	0.9	11,458	15,075	31.6	8.7	10.6	1.9
Hyundai	1,688	1,513	-10.4	5.0	4.3	-0.7	6,819	6,674	-2.1	5.2	4.7	-0.5
Infiniti	80	95	18.8	0.2	0.3	0.1	354	369	4.2	0.3	0.3	0.0
Jaguar	41	34	-17.1	0.1	0.1	0.0	129	110	-14.7	0.1	0.1	0.0
Jeep	897	763	-14.9	2.6	2.1	-0.5	4,136	3,742	-9.5	3.1	2.6	-0.5
Kia	1,617	1,723	6.6	4.8	4.8	0.0	6,821	7,065	3.6	5.2	4.9	-0.3
Land Rover	339	317	-6.5	1.0	0.9	-0.1	1,010	1,109	9.8	0.8	0.8	0.0
Lexus	873	1,357	55.4	2.6	3.8	1.2	3,705	4,168	12.5	2.8	2.9	0.1
Lincoln	74	83	12.2	0.2	0.2	0.0	299	289	-3.3	0.2	0.2	0.0
Maserati	14	12	-14.3	0.0	0.0	0.0	110	99	-10.0	0.1	0.1	0.0
Mazda	830	879	5.9	2.4	2.5	0.1	3,193	3,416	7.0	2.4	2.4	0.0
Mercedes	1,172	1,083	-7.6	3.4	3.0	-0.4	4,814	4,360	-9.4	3.6	3.1	-0.5
MINI	129	129	0.0	0.4	0.4	0.0	523	438	-16.3	0.4	0.3	-0.1
Mitsubishi	74	44	-40.5	0.2	0.1	-0.1	230	229	-0.4	0.2	0.2	0.0
Nissan	1,268	1,172	-7.6	3.7	3.3	-0.4	6,015	5,235	-13.0	4.6	3.7	-0.9
Polestar	27	48	77.8	0.1	0.1	0.0	175	76	-56.6	0.1	0.1	0.0
Porsche	248	246	-0.8	0.7	0.7	0.0	1,051	1,065	1.3	0.8	0.7	-0.1
Ram	481	359	-25.4	1.4	1.0	-0.4	2,116	1,783	-15.7	1.6	1.2	-0.4
Rivian	197	274	39.1	0.6	0.8	0.2	445	1,100	147.2	0.3	0.8	0.5
Subaru	1,321	1,188	-10.1	3.9	3.3	-0.6	5,513	5,261	-4.6	4.2	3.7	-0.5
Tesla	4,156	4,644	11.7	12.2	13.1	0.9	14,133	19,494	37.9	10.7	13.7	3.0
Toyota	5,227	6,105	16.8	15.4	17.2	1.8	22,083	23,401	6.0	16.7	16.4	-0.3
Volkswagen	895	829	-7.4	2.6	2.3	-0.3	3,880	3,473	-10.5	2.9	2.4	-0.5
Volvo	376	293	-22.1	1.1	0.8	-0.3	1,170	1,309	11.9	0.9	0.9	0.0
Other	164	236	43.9	0.5	0.7	0.2	354	652	84.2	0.3	0.5	0.2

Data sourced from Experian Automotive.

The table shows new retail light vehicle (car and light truck) registrations in San Diego County market. Figures are shown for the 1st Quarters of '23 and '24, and annual totals during 2022 and 2023. The top ten ranked brands in each change category are shaded yellow.