

Luxury Shopping Gains Traction

Widespread Regional Gains Fueled by New Entries Propel Growth

42

Number of states to experience an increase in luxury shopping activity Jan-June 2015 vs. Jan-June 2014

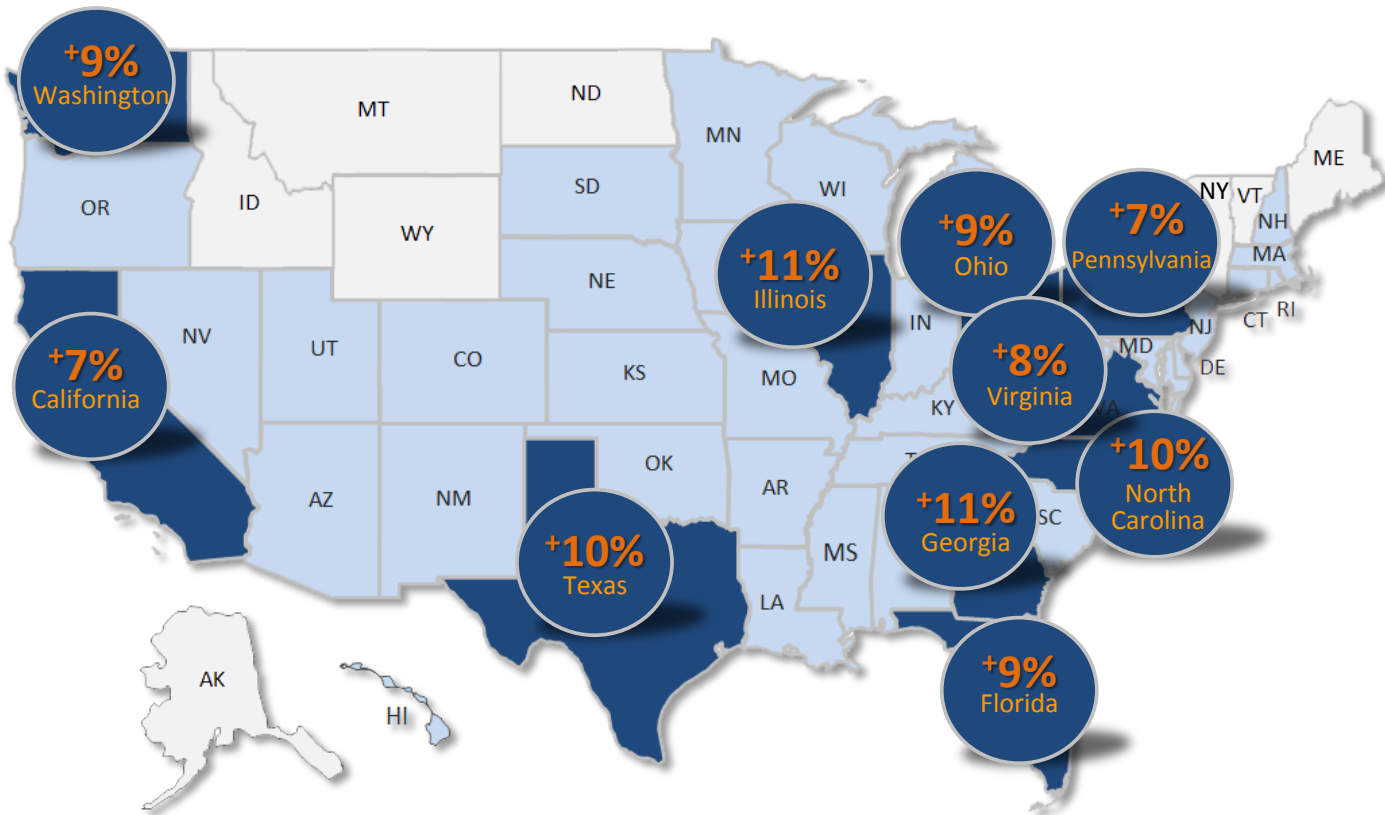
+9%

Average gain in luxury interactions among the top 10 growth states year-over-year

Regional Gains in Luxury Shopping Activity

States with increased luxury interactions

Top 10 luxury shopping activity growth states



Shopper interest in luxury is sweeping the country, with the greatest growth coming from ten states which now account for an average of nearly one million luxury interactions each month. Despite the broad regional uptick, there are a handful of states not keeping pace, mainly in the West and Northeast, including New York (NY, VT, ME, ND, MT, WY, ID, AK).

Top 10 Strongest Growth Luxury States

Luxury Segments Exceeding National Share Growth Rate By Largest Margin

Among the greatest growth states, these segment standouts are well ahead of their respective national share growth rates. The top three model movers fueling these shifts span fourteen luxury brands, and nearly half of the movers across the ten states are new launches from last year or were recently redesigned (A3).

+16%

Average share growth among top luxury segments exceeding national share growth rate

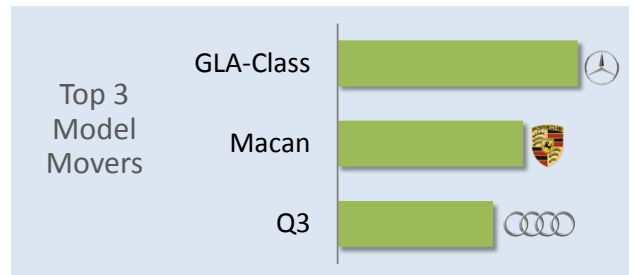
Jan-June 2015 vs. Jan-June 2014

14

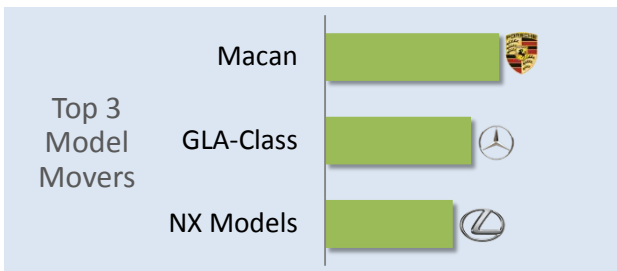
Number of new and redesigned models among the top luxury movers

Established models New/redesigned models

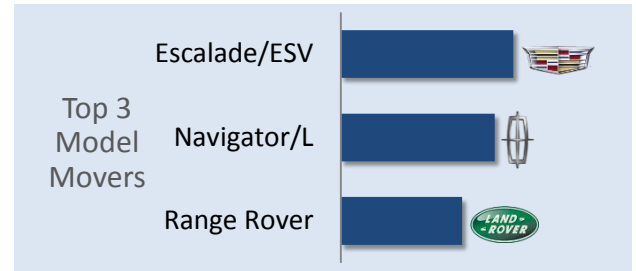
Georgia Segment: **Luxury Compact SUV**
+36% Share Growth



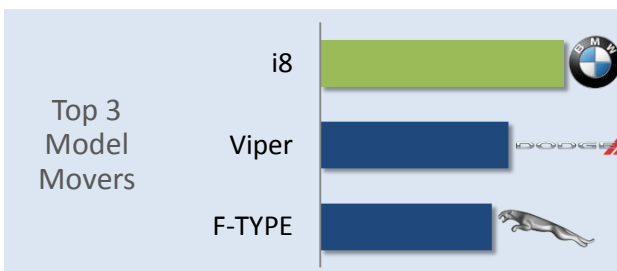
California Segment: **Luxury Compact SUV**
+32% Share Growth



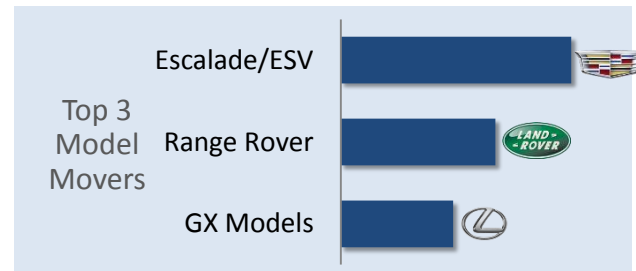
North Carolina Segment: **Luxury Large SUV**
+22% Share Growth



Texas Segment: **Luxury Sports Car**
+12% Share Growth

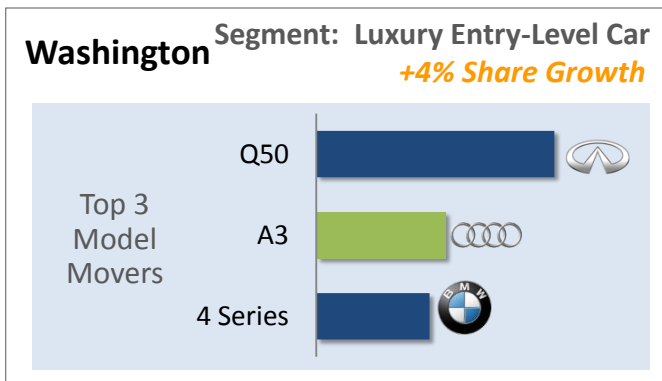
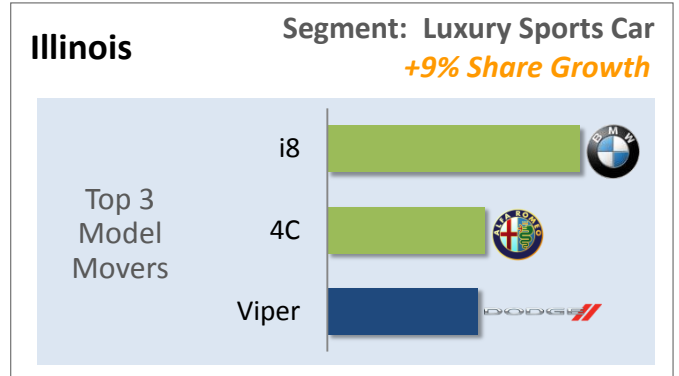
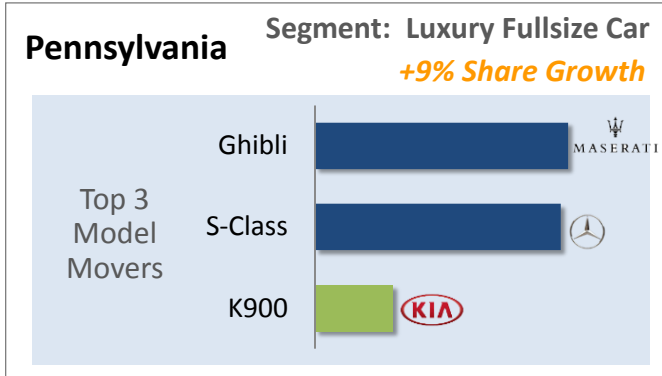
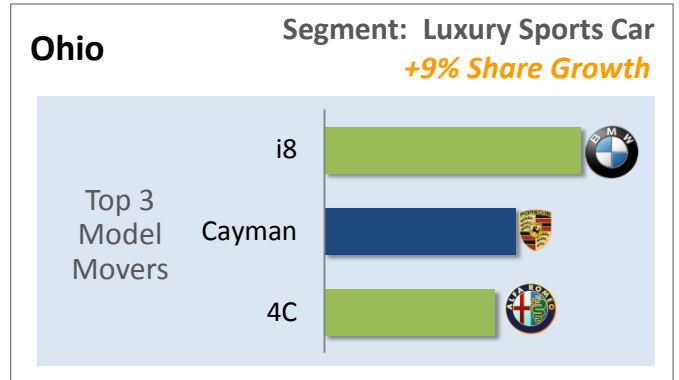
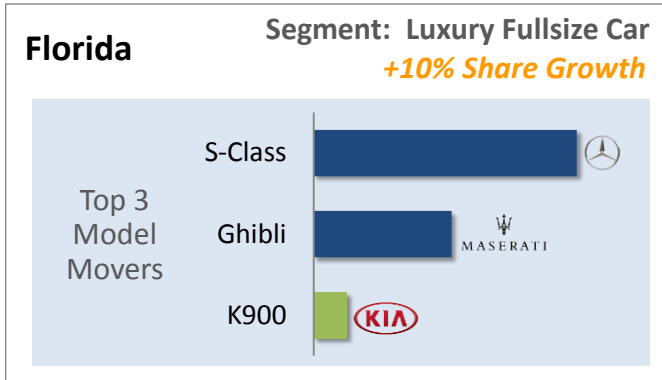


Virginia Segment: **Luxury Large SUV**
+11% Share Growth



Top 10 Strongest Growth Luxury States

Luxury Segments Exceeding National Share Growth Rate By Largest Margin



The Bottom Line

Demand for luxury vehicles is heating up compared to a year ago, fanned by the 10 greatest growth luxury markets and attention on fresh and redesigned models (which are among the top segment movers in eight of those ten states). In this positive luxury climate, trends from these rising markets indicate that the heightened luxury shopper considerations are wide-ranging, illustrating an opportunity for all luxury OEMs to both take advantage of this momentum as well as mitigate the encroachment of emerging model options.