



Maximizing Reach and New Opportunities in 2026



The state of the luxury car industry today

January–October 2025 (CYTD), United States



Luxury vehicles have captured 19% of total U.S. new vehicle market share so far this year



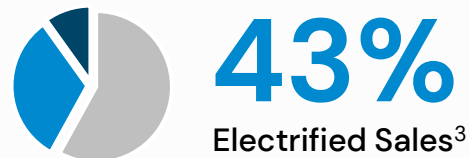
2.1 million new retail luxury vehicles were sold between Jan–Oct 2025, up +3.5% YoY



Leases have made up 40% of all new luxury registrations this year, up +4.4 points YoY



Luxury brands are sitting on an average of 94 days' supply as of October 2025, up +8.3% YoY²



EVs and Hybrids have accounted for a combined 43% of all new luxury vehicle sales in 2025



Demand remains high for CPO, but supply is low due to reduced new-car production from 2020–2022.

1. S&P Global Mobility, Polk Catalyst for Insight (2025). "New Registrations: Industry Overview." United States, CYTD, Jan–Oct 2025.

2. Cox Automotive (2025). "New–Vehicle Inventory Increases as Sales Slow in Late September." 10/16/25. Days supply calculated from the average of 12 luxury brands included in the Sep. 2025 Days' Supply report.

3. S&P Global Mobility, Polk Catalyst for Insight (2025). "New Luxury Vehicle Registrations by Fuel Type." United States, CYTD, Jan–Oct 2025.

4. Auto Remarketing (2025). "CPO sales up 2% in first half of the year, but June shows steep drop." July 23, 2025.

What's trending Houston

Period: January – November 2025

56,943

Total Units Sold



-1.01% Sales Change
Year over Year



-580 Less Units
Year over Year

Make		Sales	Sales Change	YOY Share Change
	Tesla	10,606	-851	-1.3
	Lexus	10,346	+356	+0.8
	BMW	6,995	-38	+0.1
	Mercedes- Benz*	6,653	-216	-0.3
	Cadillac	6,543	+1,074	+2.0

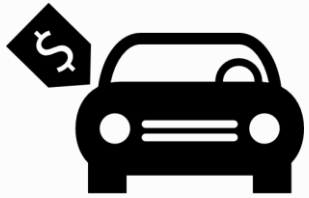
Segment		Sales	Sales Change	YOY Share Change
	SUV Luxury Mid-Size	21,748	-587	-0.64
	SUV Luxury Large	13,864	+2,113	+3.92
	SUV Luxury Compact	7,535	-1,771	-2.95
	Luxury Mid-Size	6,938	+943	+1.76
	Luxury Compact	3,227	-280	-0.43

*Sprinter sales excluded

Model		Sales	Sales Change	YOY Share Change
	Model Y	6,203	-689	-1.09
	Model 3	3,361	+570	+1.05
	RX	2,042	-279	-0.45
	TX 350	1,679	+741	+1.32
	GLE SUV	1,667	-20	-0.01

What's trending Houston

January–November 2025 Industry Insights



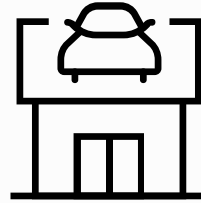
Houston Market Sales

- Over 274,000+ units were sold in the Houston market during Jan–Nov '25, highlighting steady demand and market resilience
-  3.7% Year-over-Year Sales Growth indicating stable performance and steady market momentum.



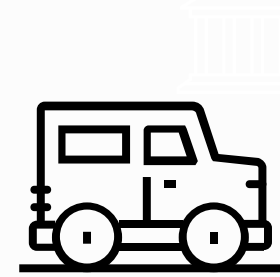
Market Performance

- March was Houston's highest performing month with 28,988 total units sold.



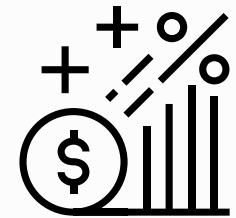
Competitive Landscape

- In Jan–Nov, luxury vehicles captured 20.8% of the Houston market, while domestic vehicles remained dominant at 79.2%, indicating a steady preference for domestic models.



Segment Sales

- Luxury Mid-Size SUV's led Jan–Nov performance, delivering +221 units and a 4.53% YoY share gain reinforcing it's role as a priority for revenue growth.

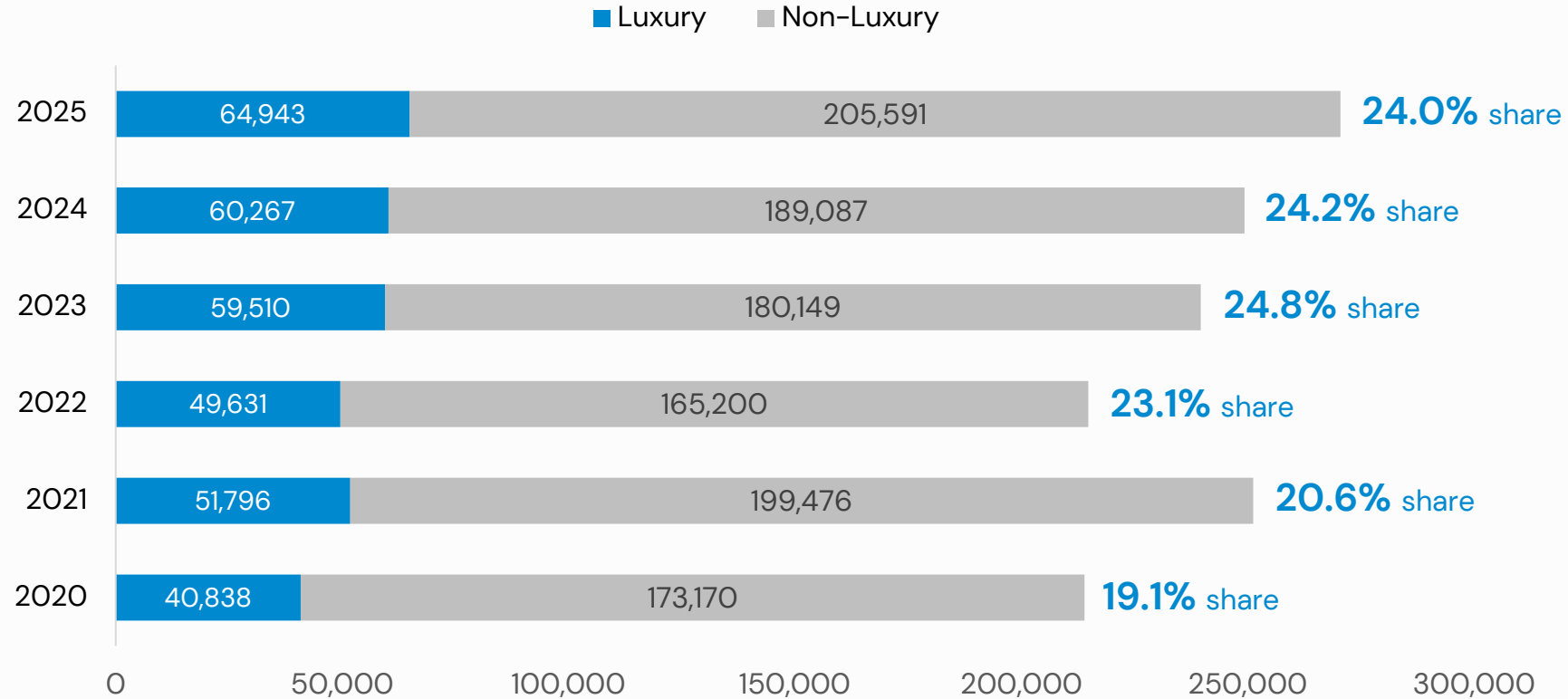


Inventory Challenges

- Client inventory remains low for key segments/models, potentially limiting sales opportunities.
- Limited Inventory of Compact SUVs like the GLE and GLC may constrain sales amid high consumer demand.

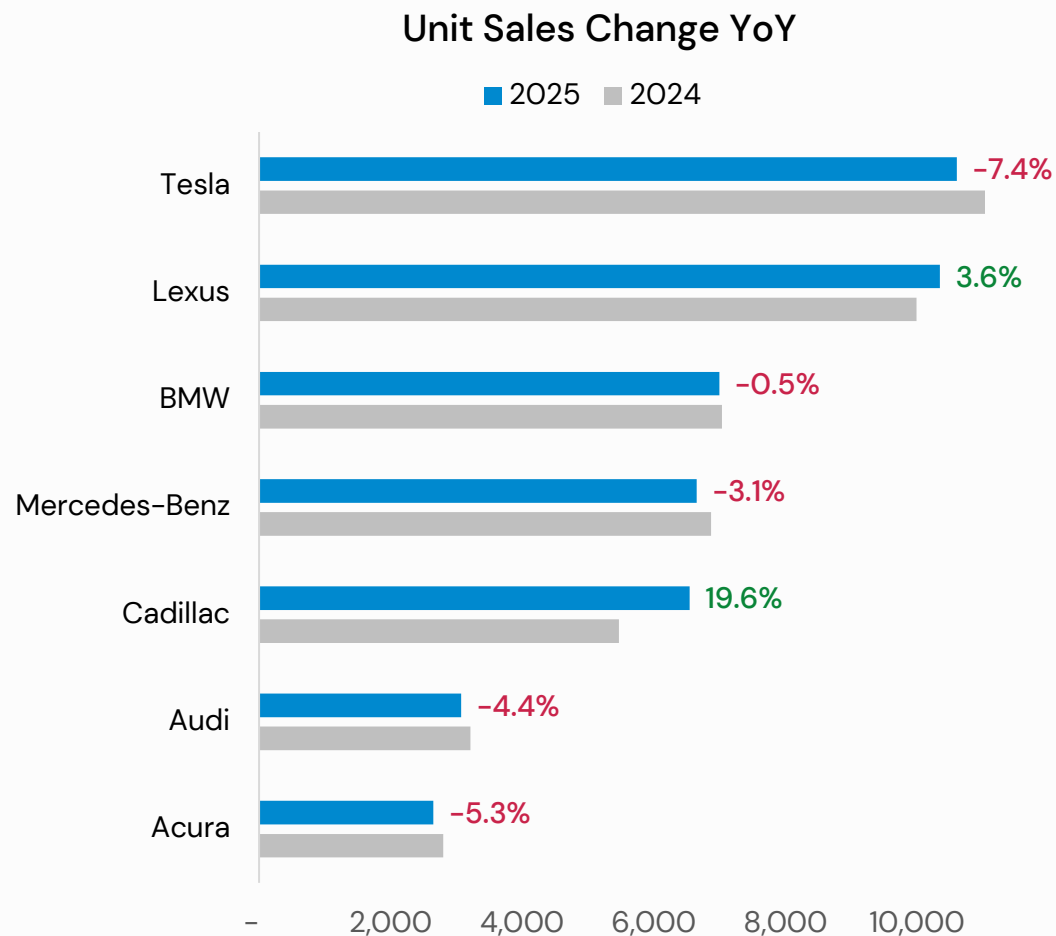
Houston luxury sales on the rise since 2022; share remains over 24%

January–October (CYTD)



Houston luxury market trends downward in 2025, Mercedes loses share

January–November 2025 vs. 2024



Source: Autoflyte (2025). New Luxury Vehicle Sales, Houston Market. Jan–Nov 2025 vs. 2024.

Rank	Dealer	2025 Sales YTD	2024 Sales YTD	Sales Change	Market Share	Share Change
1	Tesla	10,606	11,457	-7.4%	18.6%	-1.3
2	Lexus	10,346	9,990	+3.6%	18.2%	+0.8
3	BMW	6,995	7,033	-0.5%	12.3%	+0.1
4	Mercedes-Benz*	6,653	6,869	-3.1%	11.7%	-0.3
5	Cadillac	6,543	5,469	+19.6%	11.5%	+2.0
6	Audi	3,072	3,213	-4.4%	5.4%	-0.2
7	Acura	2,650	2,799	-5.3%	4.7%	-0.2
8	Land Rover	2,149	2,501	-14.1%	3.8%	-0.6
9	Infiniti	1,793	1,946	-7.9%	3.2%	-0.2
10	Porsche	1,458	1,403	+3.9%	2.6%	+0.1
11	Genesis	1,431	1,320	+8.4%	2.5%	+0.2
12	Lincoln	1,430	1,845	-22.5%	2.5%	-0.7
Luxury Total		56,943	57,523	-1.0%		

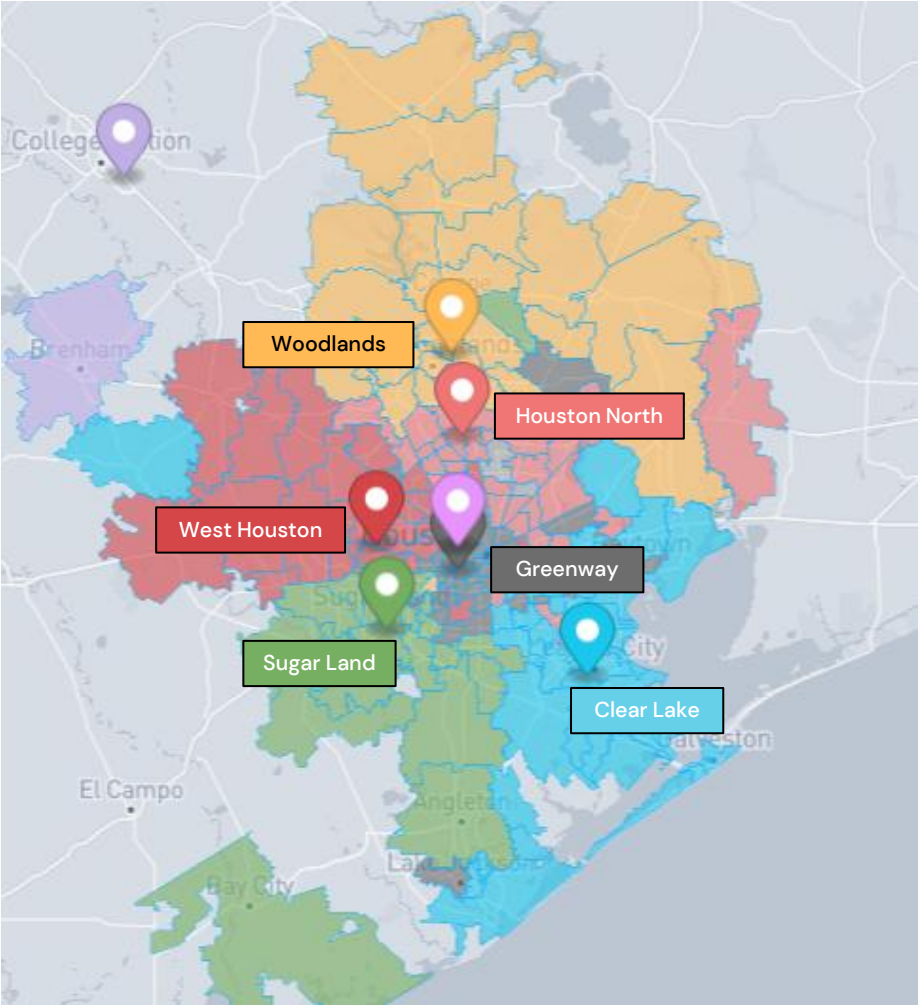
*Sprinter sales excluded

MB Competition: Greenway with greatest drop, out-of-market dealers surge

January–November 2025 vs. 2024

Rank	Dealer	Period Sales	LY Sales	Sales Change	Market Share	Share Change
1	MB of Houston Greenway	1,302	1,466	-11.2%	18.8%	-2.03
2	MB of West Houston	1,246	1,201	+3.7%	18.0%	+0.93
3	MB of the Woodlands	1,062	1,031	+3.0%	15.4%	+0.69
4	MB of Sugar Land	993	1,098	-9.6%	14.4%	-1.27
5	MB of Houston North	867	877	-1.1%	12.5%	+0.06
6	MB of Clear Lake	691	695	-0.6%	10.0%	+0.10
7	Star Motor Cars	263	201	+30.8%	3.8%	+0.94
8	Park Place Motorcars Dallas	71	60	+18.3%	1.0%	+0.17
9	MB of College Station	39	27	+44.4%	0.6%	+0.18
10	MB of Beaumont	27	26	+3.8%	0.4%	+0.02
Total New Vehicle Sales		6,916	7,028	-1.6%		

↑
Out of market



Source: Autoflyte (2025). New Mercedes-Benz Vehicle Sales, Houston Market. Jan–Nov 2025 vs. 2024.

Top opportunity luxury vehicles in Houston

Period: Jan- Nov 2025 | Location: Houston | Client

62.5% client's sales came from the **within a 15-Mile Radius** where these **segments** and **models** present the most opportunity:

GLE SUV



- 7042 total missed potential opportunity.
- 6645 sales to competitive makes.
- 397 sales to same make dealers.
- **GLE SUV** leaders:
 1. Mercedes-Benz of Sugar Land (182)
 2. Mercedes-Benz of Houston Greenway (162)
 3. Mercedes-Benz of West Houston (117)
- Top ZIPs:
 - 77479 (69), 77459 (56), 77056 (42)

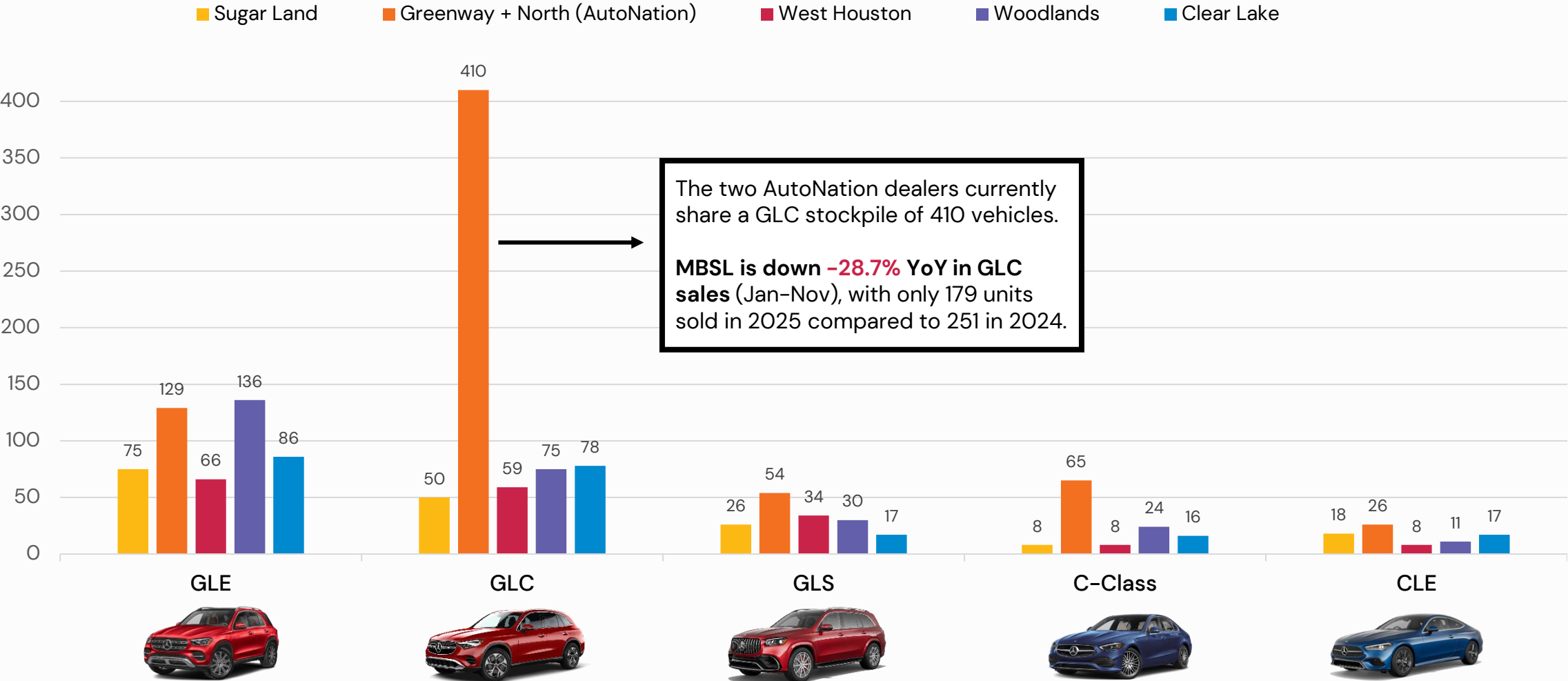
GLC SUV



- 1948 total missed potential opportunity.
- 1697 sales to competitive makes.
- 251 sales to same make dealers.
- **GLC SUV** leaders:
 1. Mercedes-Benz of Houston Greenway (123)
 2. Mercedes-Benz of Sugar Land (113)
 3. Mercedes-Benz of West Houston (73)
- Top ZIPs:
 - 77479 (49), 77407 (27), 77056 (23)

Inventory by model: Greenway & North share massive GLC inventory

Houston Market Mercedes-Benz Rooftops | Inventory as of December 12, 2025



Sources: Mercedes-Benz Dealer Websites. Dealer Inventory, Houston Market. December 12, 2025; Autoflyte (2025). Client, Dealer Zone Report, Jan-Nov 2025.

Mercedes-Benz sees YoY growth with Hispanic buyers in Houston

New Vehicle Registrations: Jan-Oct 2025 (CYTD), Houston Market

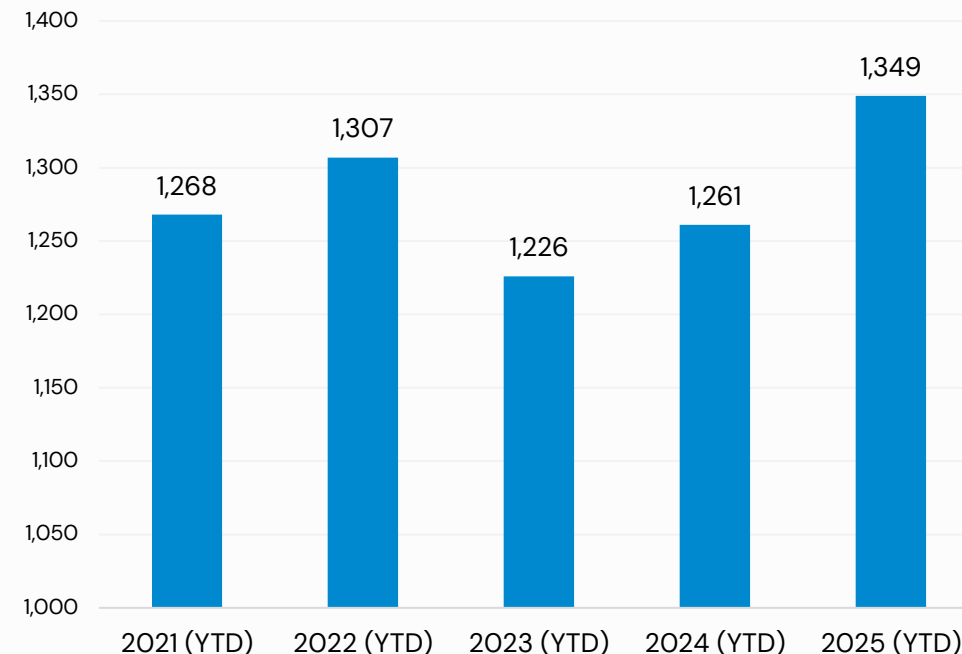
Mercedes-Benz new vehicle sales to Hispanic buyers are up **+7%** YoY across all dealers in the Houston market, and **+17.4% at Client**. Hispanic MB sales have increased for three consecutive years as of October 2025.

Be strategic in your creative and audience targeting to ensure your message is reaching and appealing to this growing customer base.

	Period Sales	LY Sales	Sales Change	% of Total Sales
Mercedes-Benz (Total)	1,349	1,261	+7.0%	15.3%
Client	142	121	+17.4%	13.1%

↓
10 points higher than the brand overall

Mercedes-Benz sales to Hispanic buyers in Houston



Source: IHS Automotive powered by Polk, CYTD Oct '25. Overall dealer sales totals include those from all geographies and outside the Comcast Advertising footprint. Market/zone-specific sales figures are based on the Comcast Advertising zone footprint within selected market/zone(s). Houston DMA

Your investment is going to the zones that matter most

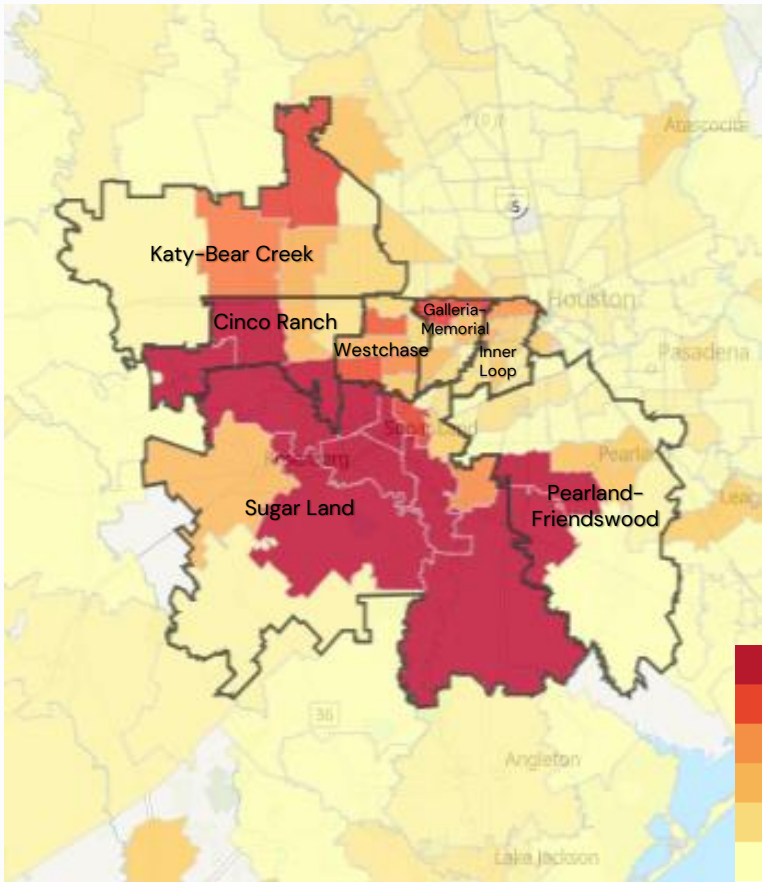
Client | Period: January – November 2025

83%

Of your sales occurred in these 7 zones:
Sugar Land, Cinco Ranch, Westchase,
Pearland-Friendswood, Katy-Bear-Creek, Inner
Loop and Galleria-Memorial

466

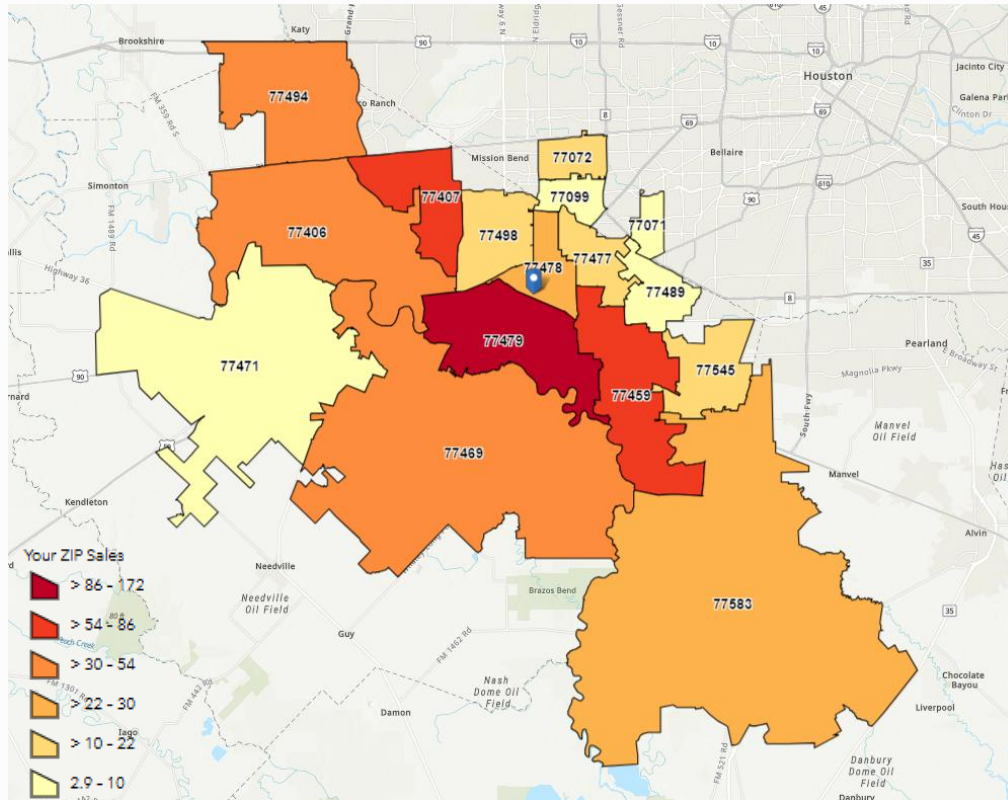
Sugar Land makes up 44% of your
total sales and 30% of your budget
was allocated here



Zone Name	Sales	% to total sales	Budget Allocation
Sugar Land	466	44%	30%
Cinco Ranch	132	13%	18%
Pearland-Friendswood	72	7%	10%
Westchase	62	6%	10%
Inner Loop	53	5%	5%
Galleria-Memorial	45	4%	5%
Katy-Bear Creek	42	4%	10%

Continue to dominate zip codes that are important to you

Client | Period: January – November 2025



583

Of your sales occurred in these 16 zip codes

44%

Client has 44% of the share in these zip codes

50.5%

of your total sales came from these zip codes

Rank	Dealer	January – November'25 Sales
1	Client	583
2	Mercedes-Benz of West Houston	258
3	Mercedes-Benz of Houston Greenway	245
4	Mercedes-Benz of Clear Lake	68
5	Mercedes-Benz of Houston North	55
6	Mercedes-Benz of the Woodlands	23



Client is the **#1 selling** Mercedes-Benz dealer in your home zip of 77478

Client vs. Competitors

Client

Mercedes-Benz of Sugar Land | SPRINTER | 15625 Southwest Freeway, Sugar Land, TX, 77478 | Sales: 9am-7pm | Service: 7:30am-7pm

4.99% for 72 Months on All New GLC SUVs & GLC Coupes

See Inventory

Local Luxury Competitors

Audi Sugar Land | New Inventory | Pre-owned Inventory | Service & Parts | Collision | Specials & Finance | About Us

The Season of Audi is here. Take advantage of 1.99% APR on Q5 and A5 models.

GENESIS OF SOUTHWEST HOUSTON | NEW VEHICLES | PRE-OWNED VEHICLES | CURRENT OFFERS | FINANCE | OWNERSHIP

GENESIS SIGNATURE EVENT | 1.99% APR

LAND ROVER SOUTHWEST HOUSTON | SHOP NEW | COUNTRY VEHICLES | SHOP PRE-OWNED & CERTIFIED

SCHEDULE YOUR OWN SERVICE APPOINTMENT ONLINE | RECEIVE 10% DISCOUNT ON

NEW 2025 RANGE ROVER SPORT P380 SE | LEASE FOR \$1,049 /PER MONTH FOR 36 MONTHS | \$3,000 CASH OR \$0 DOWN

ALL NEW 2025 RANGE ROVER SPORT MODELS | FINANCED AT 2.9% APR FOR 12 TO 60 MONTHS

BIG STAR CADILLAC | COMPLIMENTARY LEASE WITH LEASE OR PURCHASE OF NEW VEHICLE | 2025 CADILLAC LYRIQ AND OPTIQ AND 2026 CADILLAC VISTIQ | 2.9% APR FOR 60 MONTHS

BMW of Houston North | New Inventory | BMW Electric | Courtesy & Demo

THE BMW ROAD HOME SALES EVENT | NEW 2026 BMW X3 MODELS. | 0.9% APR FOR 60 MONTHS. PLUS, \$1000 LOYALTY CREDIT

Shop Now

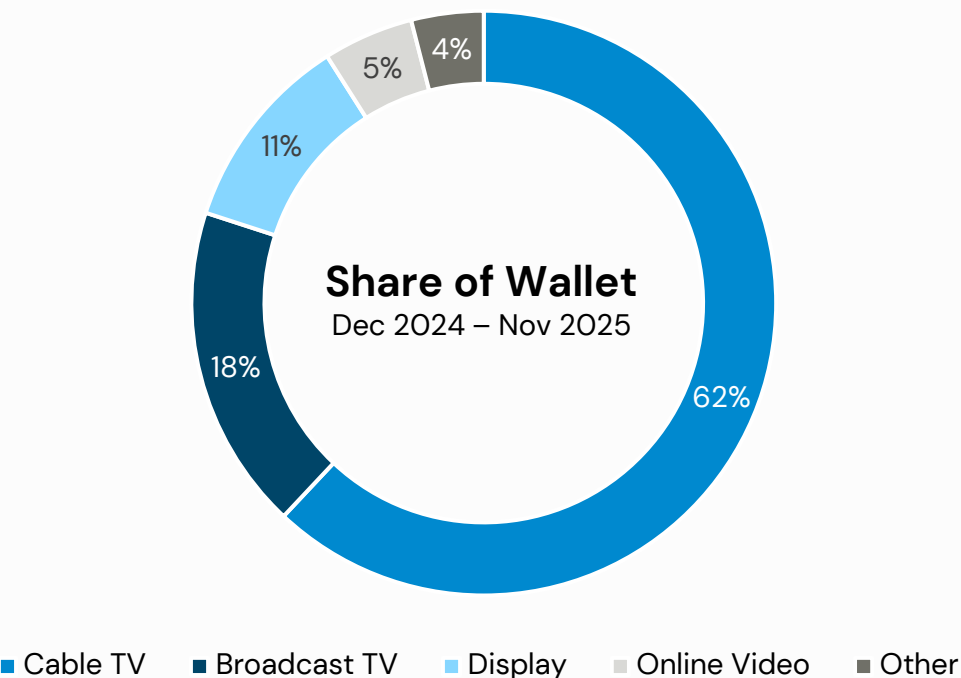
Mercedes-Benz Planning Calendar



	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Holiday Auto Sales Events	New Year	Presidents' Day		Tax Refunds	Memorial Day		Fourth of July		Labor Day		Black Friday	Year-End Sales Events
Auto Industry Annual Themes		Show Your Car Some Love		National Car Care Month	Road Trip Ready	World Environment Day	Car Collector Appreciation	Back to School Season	Baby Safety + Drive Electric	Teen Driver Safety Week		
2026 High-Value Opportunities	NFL & NCAA Playoffs	Winter Olympics	March Madness	NBA & NHL Playoffs		FIFA World Cup 2026		FedEx Cup Playoffs (Golf)	NFL and NCAA Season Kickoff	2026 Midterm Season (Nov 3)		Holiday Programming
Mercedes-Benz Events and Promotional Opportunities												
Sales Events			Spring Sales Event			Summer Sales Event					Holiday Love Celebration Sales Event + Shoes That Fit non-profit partnership	
Social Initiatives		Junior Achievement (Job Shadow)		Volunteer Week		Sustainability		Educational Empowerment		Safe Kids Worldwide		
Model Releases	AMG E 53 Hybrid		CLA EV Sedan + Hybrid (MMA platform)		AMG GT 4-Door EV (New)		GLE (Major Update); AMG CLE 63 S E (new halo)			Model Year 2027: C-Class EV (New); S-Class (Major Update); GLC EV (New)		
Mercedes-Benz Official Sports Sponsorships												
Golf				The Masters Global Sponsor			British Open Official Patron					
NCAA Football	CFP (Playoff) Official Sponsor								SEC Official Sponsor			CFP (Playoff) Official Sponsor
NCAA Sports	Southeastern Conference (SEC) Official Corporate Sponsor – All Sports											
Formula One			Mercedes-AMG Petronas Formula One Team									
IMSA Racing			Official Partner of IMSA WeatherTech SportsCar Championship (12 events in 2026)									
NFL									NFL RedZone Sponsor: "Drive of the Day"			

Mercedes-Benz Tier 1 Ad Spend: Cable TV leads with 62%

December 2024 – November 2025 (Past 12 Months)



	Estimated Spend	Share of Wallet
Cable TV	\$50,056,498	62%
Broadcast TV	\$14,546,792	18%
Display	\$8,683,832	11%
Online Video	\$3,710,270	5%
Facebook	\$1,486,635	2%
OTT	\$1,331,245	2%
Native	\$324,136	<1%
Mobile	\$24,202	<1%
Whitepaper	\$9,000	<1%
Email	\$5,000	<1%
Total	\$80,178,370	

Source: MediaRadar (2025). Mercedes-Benz USA Media Mix, December 2024 – November 2025.

Luxury brands spent \$280M on Tier 1 TV sports advertising in 2024

