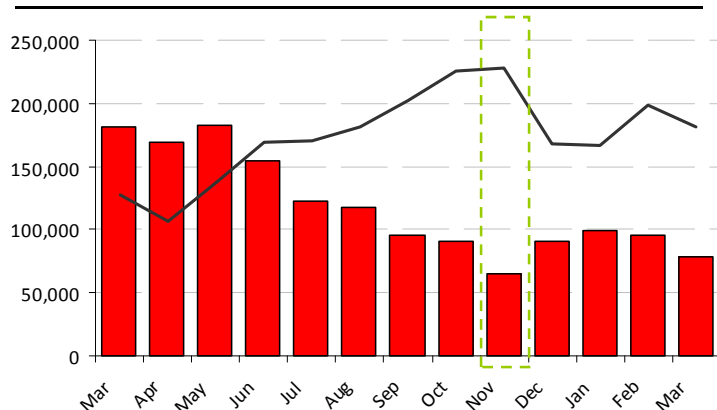


Compete Quicktake: Capturing Saturn Demand

Which brands are likely to benefit from Saturn's imminent shut-down?

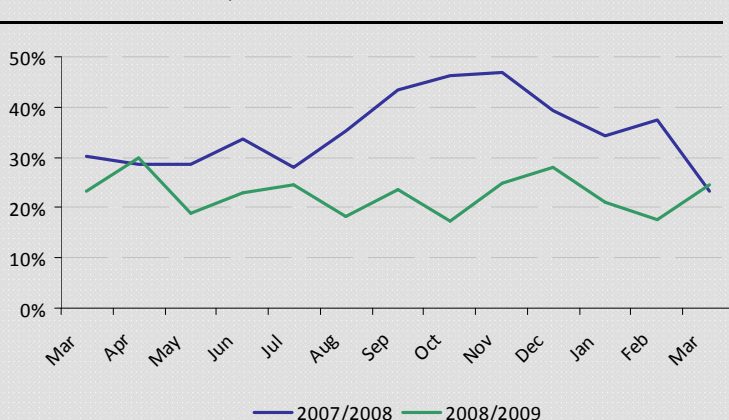


Number of Saturn shoppers – March 07/08 (line), March 08/09 (bar)



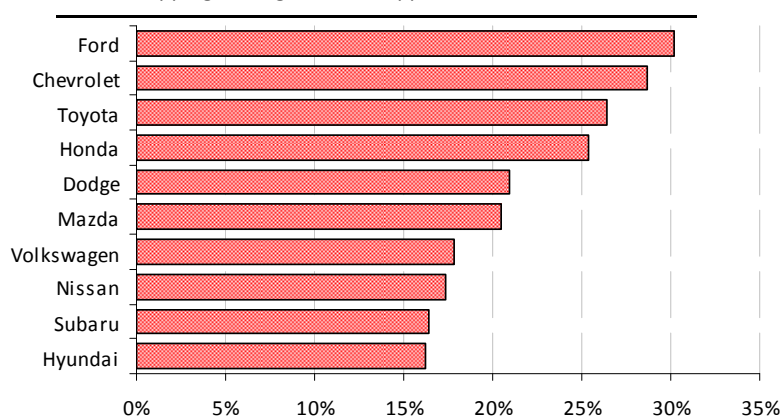
- Saturn demand peaked in Nov '07 and has been steadily declining since then
 - Average 2008 demand was 18% lower than average 2007 demand
- Demand declines coincide with weak market demand, the economic downturn and GMs announcement that it may sell the brand
 - Saturn demand has declined more than market demand; Saturn *Share of Market Interest* reached a 3 year low in March '09

Saturn Zero Cross-Shop, March 2009



- Saturn shoppers have become less focused on the Saturn brand
 - In general, more focused shoppers are easier to convert into buyers (because they are not considering other brands)
- The percent of Saturn shoppers who only shopped Saturn (zero cross-shop) over the past 12 months is below the prior 12 months (This time period includes the summer 2008 gas price spike)

Cross-shopping among Saturn Shoppers, Mar 2009



- Chevy has a good opportunity to convert Saturn shoppers into Chevy buyers; keeping them in the GM family
 - More than 25% of Saturn shoppers cross-shopped a Chevrolet in March '09
- However, Saturn shoppers aren't guaranteed to GM, they are almost as likely to be cross-shopping a Ford, Toyota or Honda; creating a conquest opportunity for these other brands

Where will the remaining Saturn shoppers turn if Saturn goes away? As of March there were 78,000 in-market Saturn shoppers; these are conquest opportunities for other brands. Stay tuned for matching behavior-based research, with survey results, that will help reveal which brands will benefit most.

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