

## AUTOINTELLIGENCE™

Monthly automotive competitive insights from Compete

### SCION PART I: SHOPPER COUNTS SINCE LAUNCH

As Scion prepares for its second generation of US products, Compete assessed its number of shoppers over time. Shopper counts exclude double-counting of shoppers that shopped more than one Scion on a given month. SMI represents the share of all in-market new vehicles shoppers market-wide that shopped one or more Scion models.

The results show three distinct periods. The first period ran from March 2003 to July 2004. The July peak coincided with peak tC shopper counts; tC was the last Scion models added.

The second period had peaks in May, August, and September 2005. The peaks were driven by elevated demand for all Scion models that coincided with sharp m-o-m increases in gas prices. The third period had a demand peak in May

2006 at 121,000 shoppers, associated with elevated gas prices as well as the launch of Yaris. For context, Yaris has been #1 in the xA cross-shop set since April 2006 and #2 in the xB cross-shop set since May, meaning Yaris demand may have spilled over to Scion.

Scion can use division level demand over time and an understanding of the drivers of that demand to optimize sales planning and to help determine when and if Scion needs additional advertising support.

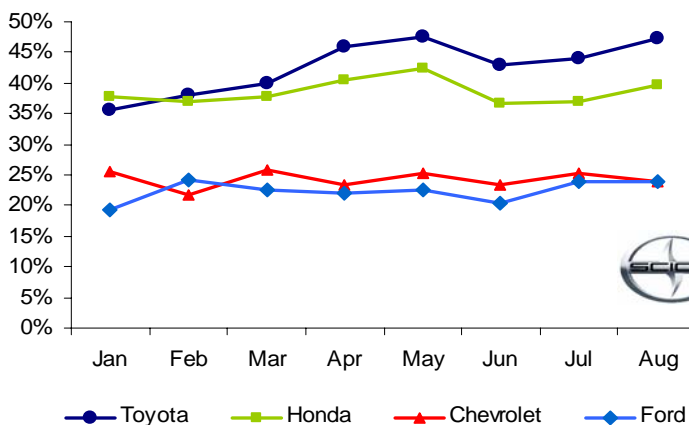
SCION SHOPPER COUNTS (LEFT) & SHARE OF MARKET INTEREST (RIGHT)  
JAN 2003-AUG 2006



### SCION PART II: CROSS-SHOP IN 2006

The third of Scion's three shopper count periods (see story above) coincided with higher cross-shopping to Toyota models—notably Yaris—among Scion shoppers. Compete quantified the extent to which Scion shoppers' increased cross-shop of Toyota models was unique to Toyota by benchmarking against cross-shopping of Honda, Chevrolet and Ford.

CROSS-SHOP AMONG SCION SHOPPERS, 2006



the extent to which the two divisions are acting independently or in tandem, and how changes in product offerings (such as Yaris) alter that dynamic.

There have been three distinct demand periods for Scion since launch

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Scion shoppers cross-shopped Honda and Toyota models at similar levels though March 2006. From April forward, Scion shoppers have cross-shopped Toyota models more. Yaris shopper counts peaked in May and were elevated again in August (not shown). The cross-shop gap between Toyota and Honda reached a period high in August. Cross-shopping of Ford and Chevrolet was relatively steady in the same period.

Toyota can use overlap between Scion and Toyota to document

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