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We put the spotlight on best performing dealers and explore data related to dealership engagement levels.

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A quick introduction to improving key performance metrics for the Philippines no.1 online automotive marketplace. 31

Used Car

What have used car buyers been searching for over the last six months?

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MotoDeal

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New Car Sales & Conversion

What are shoppers buying? How long is it taking them to buy? We showcase data related to sales volumes and conversion.



Inside AutoDeal

Stay up to date with all of our key metrics.

Important:

AutoDeal (The SirQo Group Inc.) prepared all the content in this report to represent the general data about online marketing in the Philippine automotive industry. This data is given in summary, and as such, all information is to be used and interpreted at the readers' own risk. Any data represented in this report should not be considered as any form of advice or recommendation. The SirQo Group Inc. will not be held responsible for any damages or loss of business caused by the interpretation of this document.

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The Road to Recovery

The Philippine automotive industry finished 2021 with a modest 18% growth. Despite the odd quarantine here and there, the year certainly felt much kinder than its predecessor; giving way to a total of 294,233 reported new car sales.

Mathematically, the 18% could simply account for a rebound from the two to three months in 2020 where dealership doors were locked, meaning that a good chunk of the improved metrics may have occurred because said doors were more frequently open in 2021. That would be a sensible enough analysis if decreased dealership accessibility as a result of the pandemic was the only adversary that the market faced last year. As it turns out, it wasn't, but more on that later.

While many brands and dealers have recently transitioned to digital sales activities; transactions still require (for the most part) a physical dealership for facilitation. While this is not the case for all sales, there are certainly more budget allocations going into digital lead-generation than there is going into better customer fulfillment processes, and for me, therein lies a problem and a potentially bigger opportunity. Without any real major innovation in the actual buying process, automakers and consumers are in a stand-off—with some dealers insisting that there's nothing wrong with the current process and consumers having little or no other choice. That is not to say I do not understand the industry's perspective, after all the allocation of resources to provide things like free home delivery need to come from somewhere, and can only be provided if greater financial efficiency is achieved elsewhere.

According to KPMG's 22nd Annual Global Automotive Executive Survey, stakeholders in the global automotive industry "foresee a fundamental change in how vehicles will be purchased. Most respondents expect the majority of vehicles to be sold online by 2030. Three-quarters also predict more than 40 percent of vehicles will be sold directly by automakers, bypassing dealers." The report further states that 53% of automotive executives are confident that profitability will improve over the next five years despite ongoing concerns regarding supply chain issues and the adjustment time required to adapt to industry 4.0 technologies.

With this in mind; a large focus for AutoDeal in 2022 will be helping our partners to not only accumulate prospective customers but to provide a seamless and consumer-centric online customer journey that will enable automakers and dealers to generate more sales at a lower cost.

While 2021 achieved growth, for the sake of perspective it is important to highlight that new car sales are currently 38% lower than what they were during the industry's peak in 2017. Since then, increased excise tax and a global health pandemic have been among the strongest pressures driving sales down. While many of us might attribute this to a decline in consumer confidence, the data suggests the contrary as inquiry levels for new car purchases on AutoDeal have now returned and even surpassed some of their pre-pandemic numbers. So what gives?

As it happens, other variables have taken their toll over the last two years and have led to periodic decreases in sales conversion influenced by lower auto loan approval rates and product shortages incited by global shipping and semiconductor shortages. On top of this, there's a more crowded market which has resulted in cannibalization of sales at both brand and dealership levels. While Toyota pulled away with increased market share, seven of the top ten brands from 2017 have lost anywhere from 1 to 3 percent of their market share over the last five years. That's not to say Toyota has it easy; they sold approximately 53,000 fewer units in 2021 than they did in 2017—and did so with an increasingly growing dealer network and more mouths to feed.

For certain, everywhere, everyone continues to feel the pinch. This is why efficiency needs to take precedence. Despite all of these external factors, the automotive industry soldiers on, and all of a sudden the 18 percent growth seems a little more remarkable than what it did at first glance. Kudos to all of those who battle on.

In our 13th edition of the AutoDeal Industry Insights, we highlight the improving metrics that are helping to shine a little more light on the road to recovery.



Christopher L. Franks AutoDeal Chief Operating Officer

²⁰ SUMMARY

AutoDeal is the no.1 online automotive marketplace in the Philippines.

▲ 14% YOY

34,099,431

Website Visits

Across the AutoDeal Network (AutoDeal & MotoDeal)

▲ 32% YOY

326,037

Quotes & Test Drives

Serviced to dealers from buyers inquiring on AutoDeal & MotoDeal

24,853

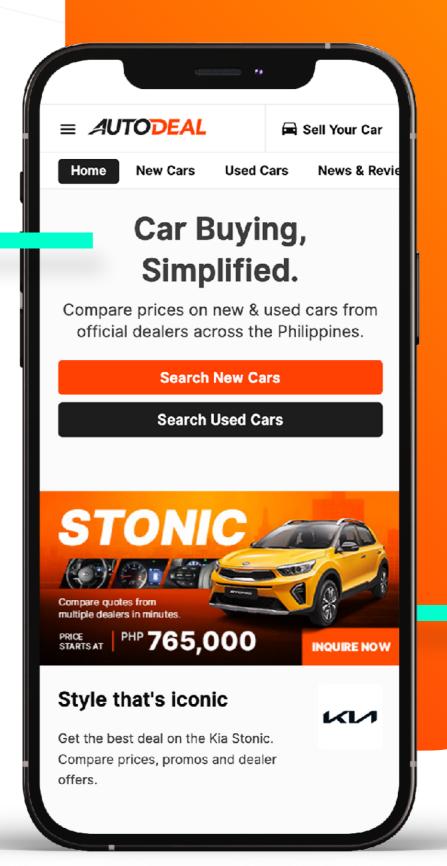
Confirmed Purchases

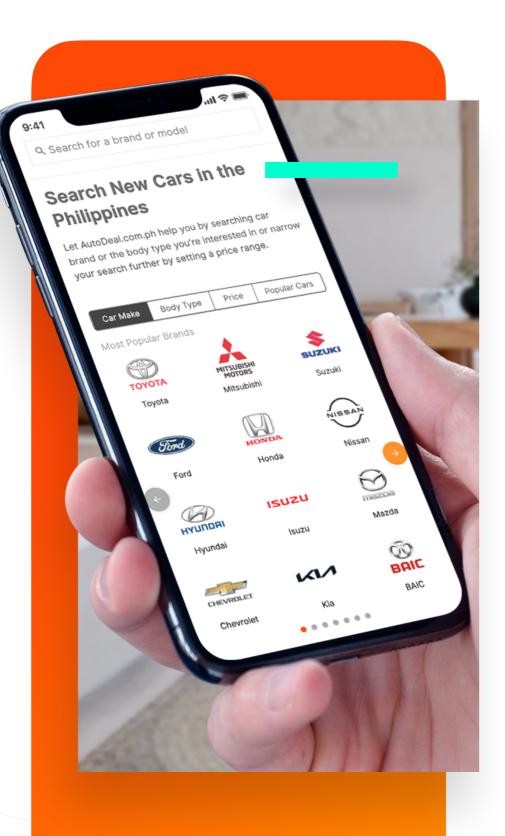
Tracked and confirmed from users who inquired via AutoDeal in 2021

586,622

Conversations

Back and forth messages between prospective car buyers and dealers





QUICK **FACTS**



Key take home points from our report



81.69%

Of AutoDeal buyers shop for vehicles using their smartphone.



P1.19M

The Average price of vehicle sold on AutoDeal in H1 2021.



62 Days

The average time it takes an AutoDeal buyer to purchase after their online inquiry.



38 mins.

The average industry response time of the top 50 fastest responding AutoDeal Partner Dealers.

CONSUMER
INTEREST & LEADS

Quotes

Test-Drives & Inquiries

Leads by Market Segment

Inquiring & Buying Trends

Leads by Location

Leads by Device

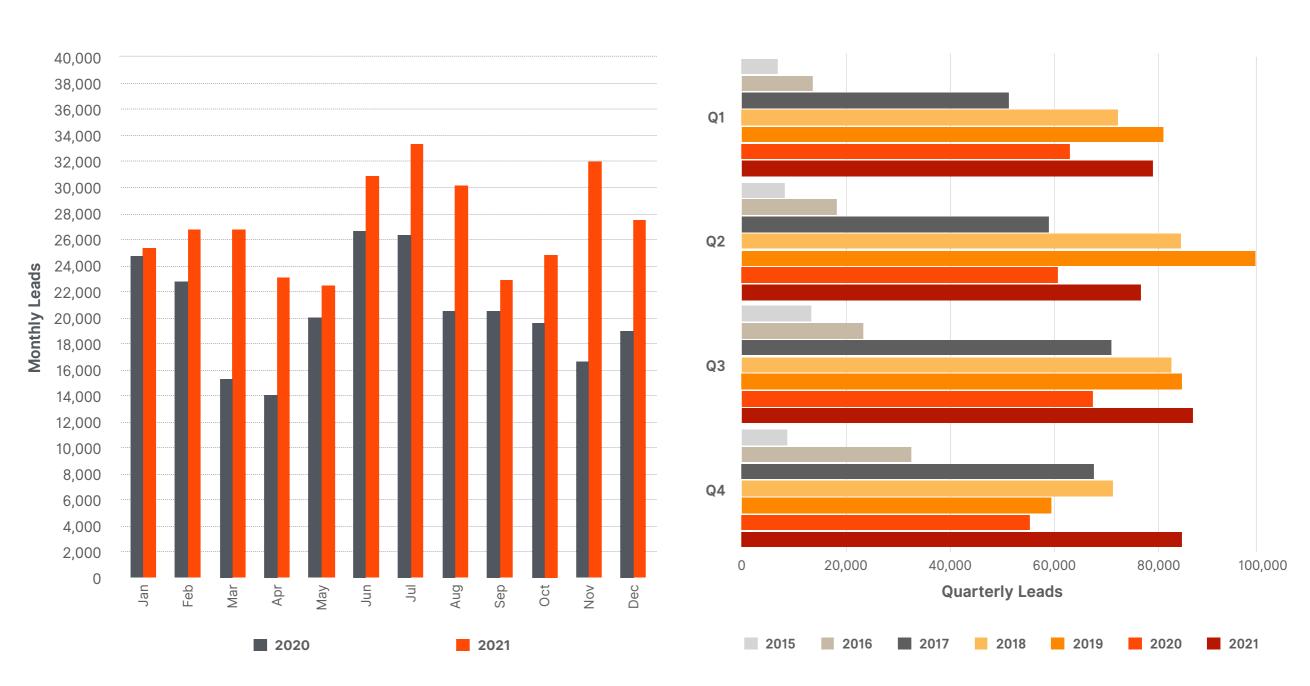
Most inquired for brands

AutoDeal Top 40

Quotes, Test-Drives & Inquiries

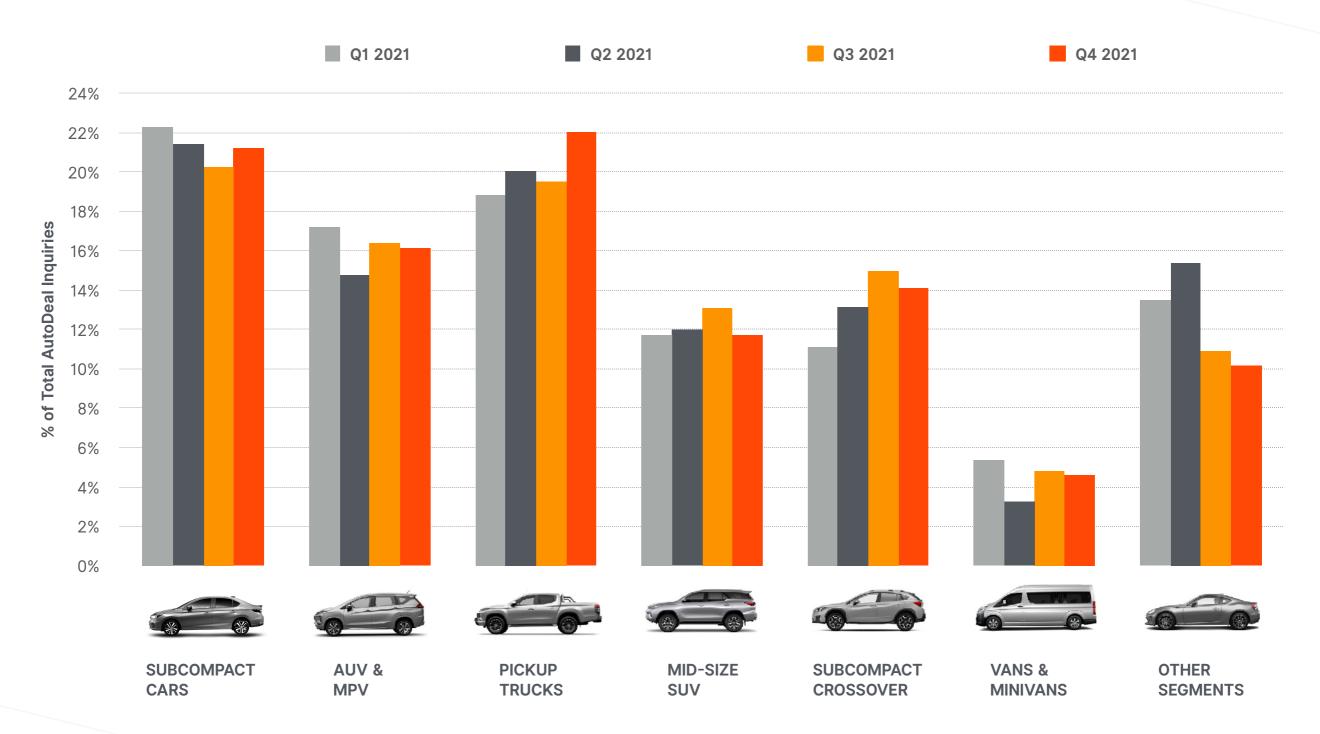


AutoDeal Leads (2015-2021)



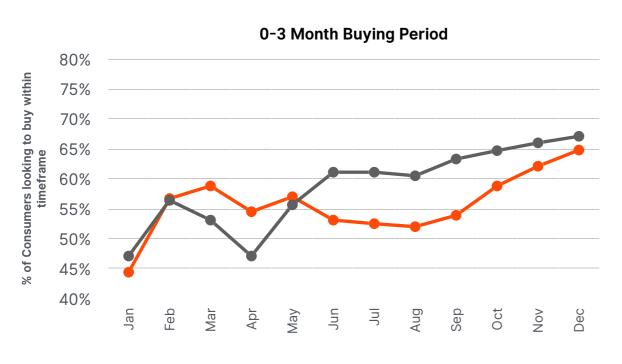
Leads by Market Segment

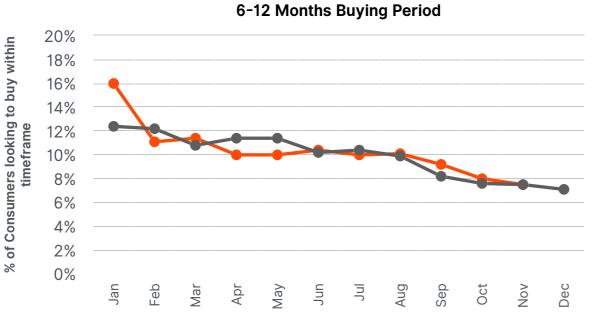
Based on AutoDeal inquiries for major vehicle categories

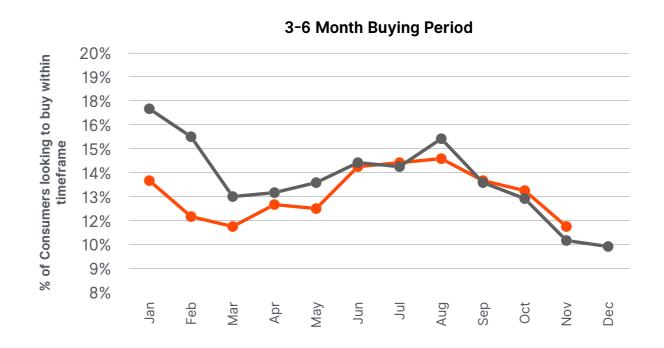


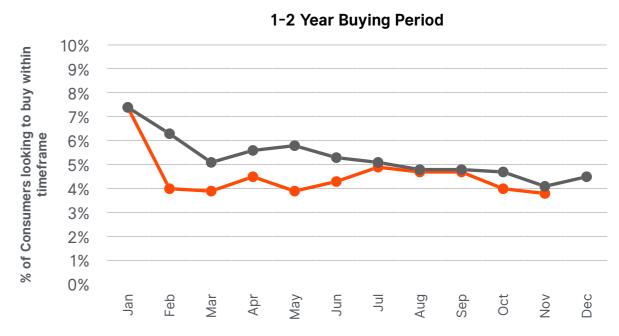
Inquiring & Buying Trends

How soon are consumers looking to buy?









Looking to Purchase within

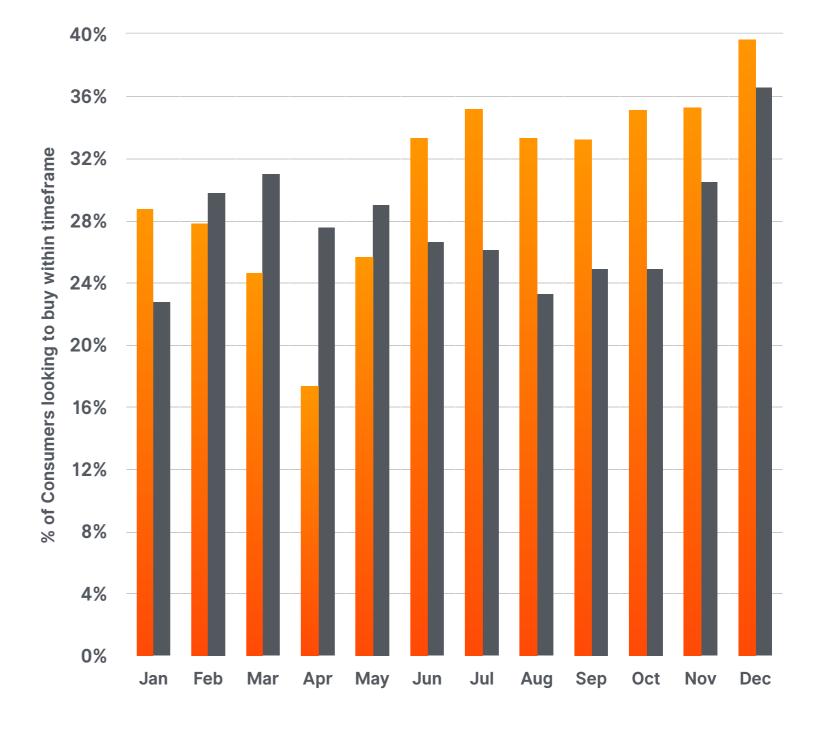
30 DAYS

from inquiry





2020 2021



Data Source: This data is derived from the indicated buying time submitted on all AutoDeal inquiries.

LEADS BY LOCATION

Inquiries accommodated in 2021:

1,321TOWNS / CITIES

Metro Manila

26.40%		% of Total Leads	
1	Quezon City	6.14%	-
2	Manila	3.07%	-
3	Makati City	2.27%	-
4	Pasig City	2.10%	-
5	Caloocan City	1.77%	-
6	Taguig City	1.72%	-
7	Parañaque City	1.67%	A
8	Las Piñas City	1.62%	•
9	Mandaluyong City	1.39%	-
10	Muntinlupa City	1.07%	

Luzon

49.32%		% of Total Leads		
	1	Dasmariñas City	1.71%	A
	2	Bacoor City	1.70%	
	3	Imus City	1.70%	_
	4	General Trias City	1.64%	-
	5	Antipolo City	1.46%	-
	6	Angeles City	1.39%	-
	7	Santa Rosa City	1.22%	-
	8	Calamba City	1.22%	-
	9	Baguio City	1.15%	
	10	San Fernando City	1.03%	_

Visayas

9.	45% ^	% of Tota	% of Total Leads	
1	lloilo City	1.43%	A	
2	Cebu City	1.37%	•	
3	Bacolod City	1.14%	-	
4	Tacloban City	0.71%	-	
5	Lapu-Lapu City	0.54%	-	
6	Mandaue City	0.48%	-	
7	Dumaguete City	0.46%	-	
8	Tagbilaran City	0.33%	-	
9	Talisay City	0.28%	-	
10	Ormoc City	0.25%	-	

Mindanao

14	4.82% ^	% of Total	Leads
1	Davao City	2.97%	-
2	Cagayan De Oro City	1.89%	-
3	General Santos City	1.05%	-
4	Zamboanga City	0.76%	-
5	lligan City	0.59%	-
6	Butuan City	0.58%	-
7	Cotabato City	0.48%	-
8	Tagum City	0.41%	-
9	Koronadal City	0.37%	-
10	Pagadian City	0.32%	-

Data Source: Based on leads (quotes, inquiries, test-drives) generated on AutoDeal.

MIMAROPA

0.96%





CENTRAL

LUZON

13.52%

METRO MANILA

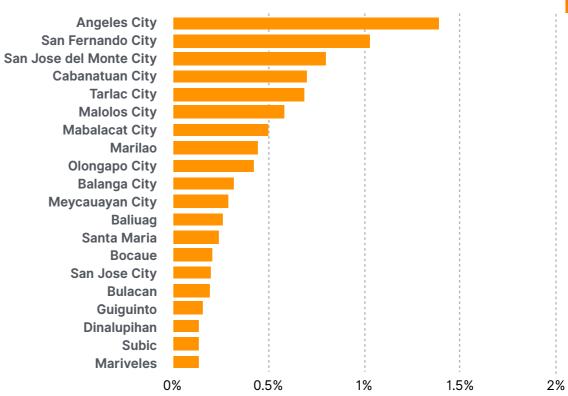
26.40%



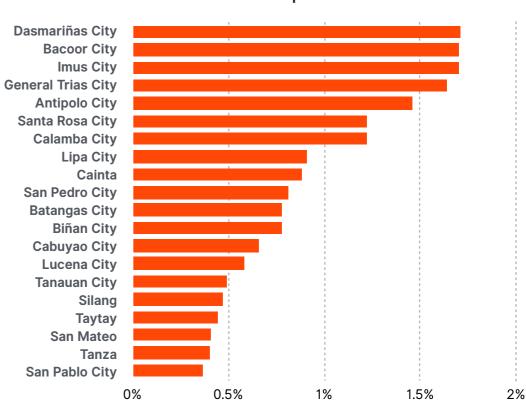
2.00%

Data Source: This data is derived from the indicated buying time submitted on all AutoDeal inquiries.





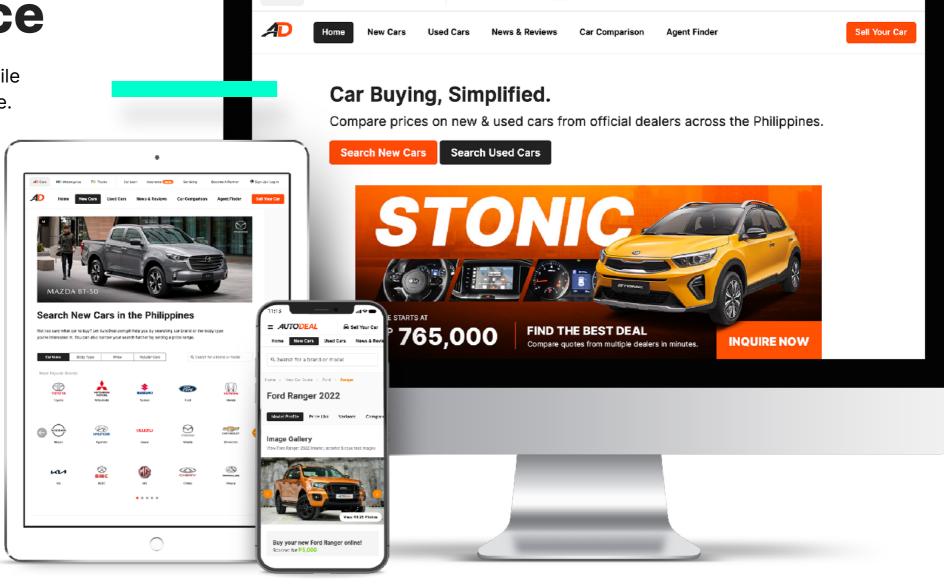
CALABARZON: Top 20 Locations



9 Sign Up / Log In

AD

Inquiries made via mobile devices continue to rise.



On Tablets

2.34% 81.69%

On Mobile Devices

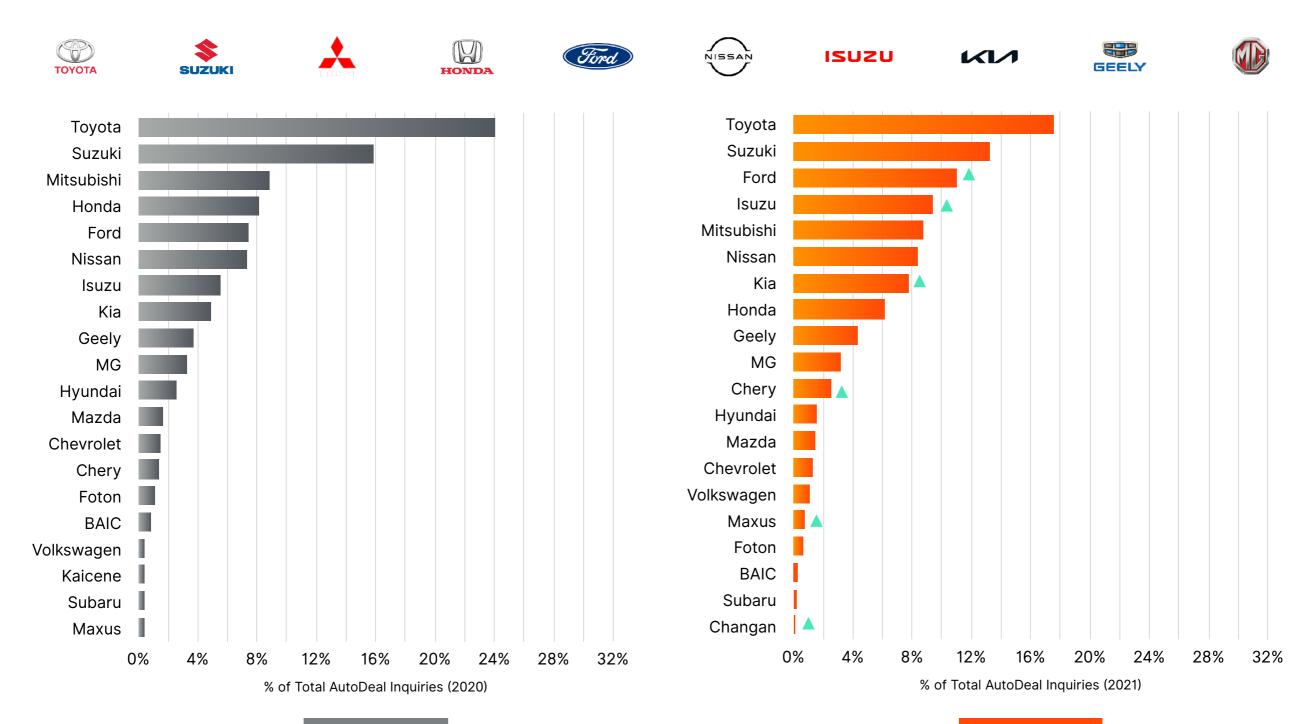
15.97%

On Desktops & Laptops



Most Inquired for Brands

How do the most popular brands of 2020 compare to 2021?



2020

Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.

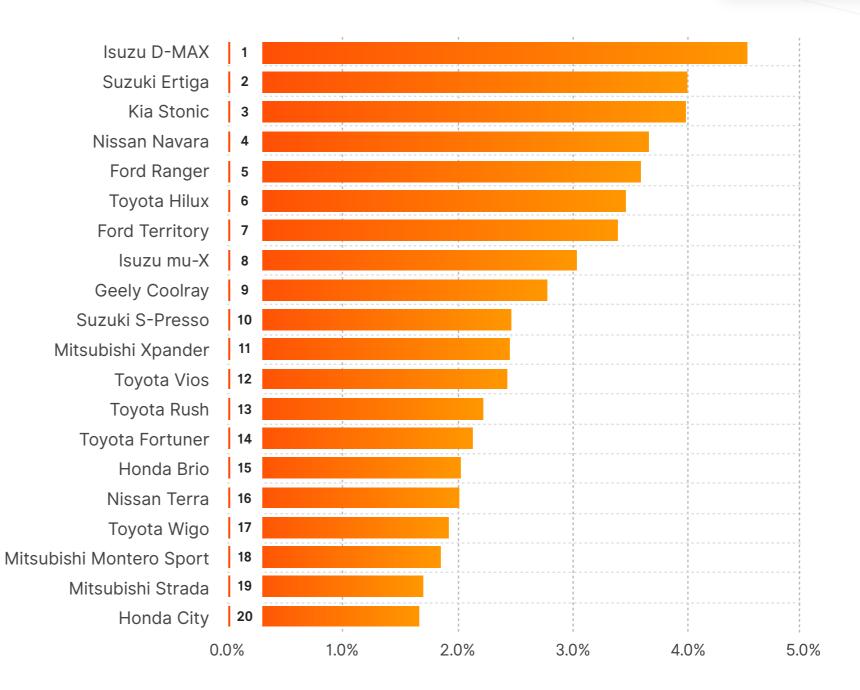
2021

TOP40

Most inquired nameplates in 2021







% of Total Inquiries on AutoDeal in 2021

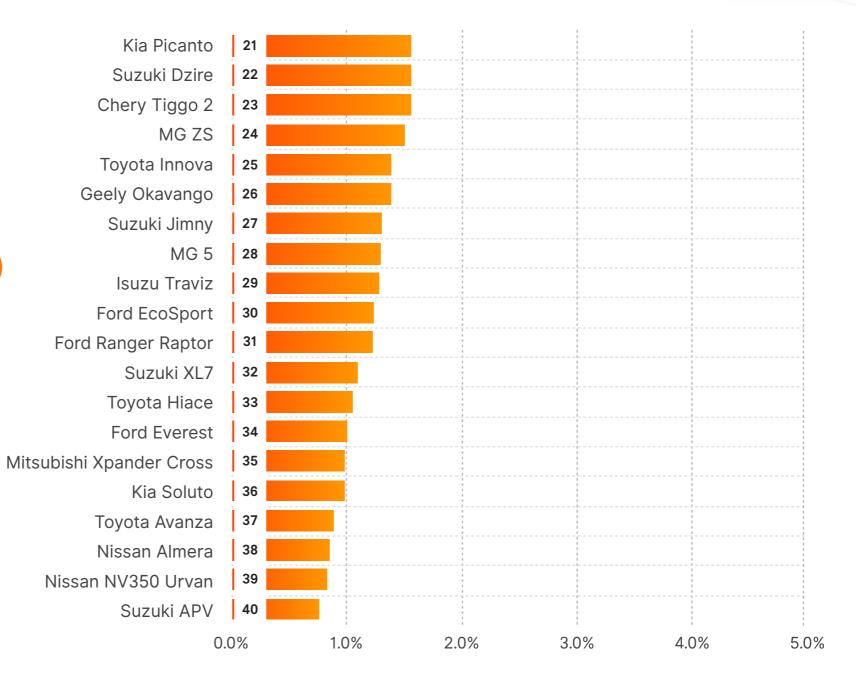
TOP40

Most inquired nameplates in 2021



#21-40





% of Total Inquiries on AutoDeal in 2021

2021 Top Selling New Vehicles

New Car Conversion Timeline

New Car Sales by Segment

New Car Sales by SRP

TOP SELLING NEW VEHICLES

Top Selling Nameplates on

the AutoDeal Platform in 2021

Mid-size SUV





MITSUBISHI MONTERO SPORT



Toyota **FORTUNER**



Nissan **TERRA**

Subcompact Cars





TOYOTA VIOS



Toyota WIGO



Mitsubishi MIRAGE G4

Subcompact Crossover





KIA **STONIC**



Ford **ECOSPORT**



MG ZS

Data Source: Data Based on leads reported as sold by AutoDeal Partner Dealers between January 1 to December 31, 2021.

AD

MPV





MITSUBISHI XPANDER



Suzuki SUZUKI ERTIGA



TOYOTA RUSH

Pickup Truck





NISSAN NAVARA



RANGER



Toyota TOYOTA HILUX

Compact Crossover





FORD TERRITORY



Chery
TIGGO 7 PRO



Commercial Vehicle





MITSUBISHI L300



Isuzu ISUZU TRAVIZ



Suzuki SUZUKI CARRY

Compact Car





HONDA CIVIC



Mazda



Toyota TOYOTA ALTIS

Van





TOYOTA HIACE



URVAN



How's your timing?

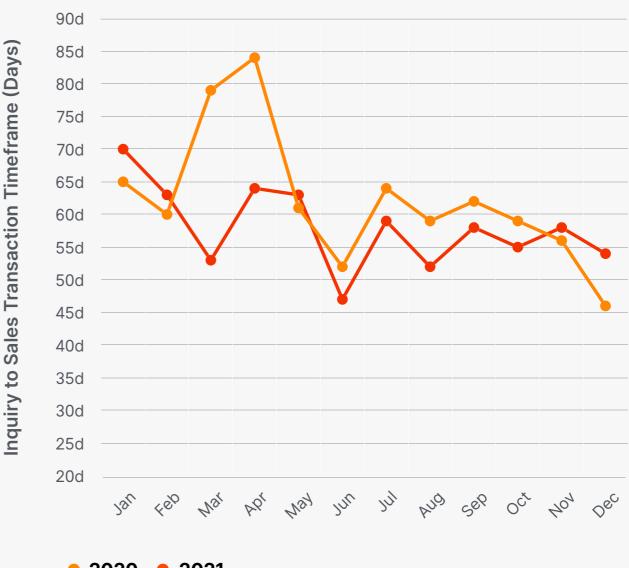
Over the last two years, we've seen a consistent pattern emerging when it comes to the speed at which consumers transact.

While the months of March to August have typically shown a great number of inquiries to the rest of the year, the speed at which consumers aim to transact significantly speeds up in the fourth quarter. As a result, sales efficiency during the tail end of Q4 and the early stage of Q1 tend to get a bump up since shorter transaction times result in better customer retention and higher sales conversion for leads solely managed by dealership sales agents.

Although the current data shows acceleration in purchases shortly after pandemic lockdowns (i.e. June 2020 and June 2021), data is still consistent at indicating slower transaction times earlier in the year.

When taking into consideration this data, auto brands might be able to strategize how they can foster longterm retention from customers inquiring earlier in the year and build to a more aggressive 'buy now' strategy towards the end of it.

Mean average lead to sale conversion for sales reported by AutoDeal Partner Dealers.

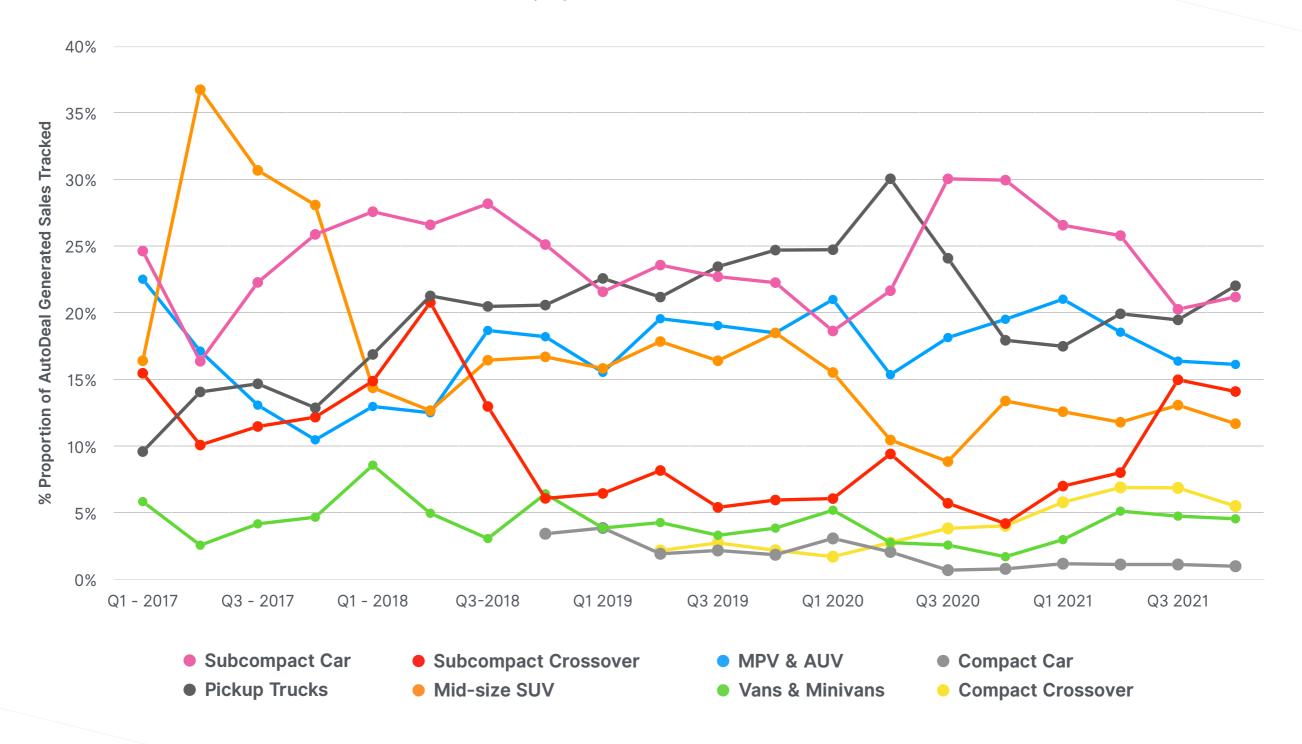


20202021

^{*}Based on sales tracked in AutoDeal's Lead Management System

New Car Sales by Segment

Transaction proportions of vehicles sold on AutoDeal*



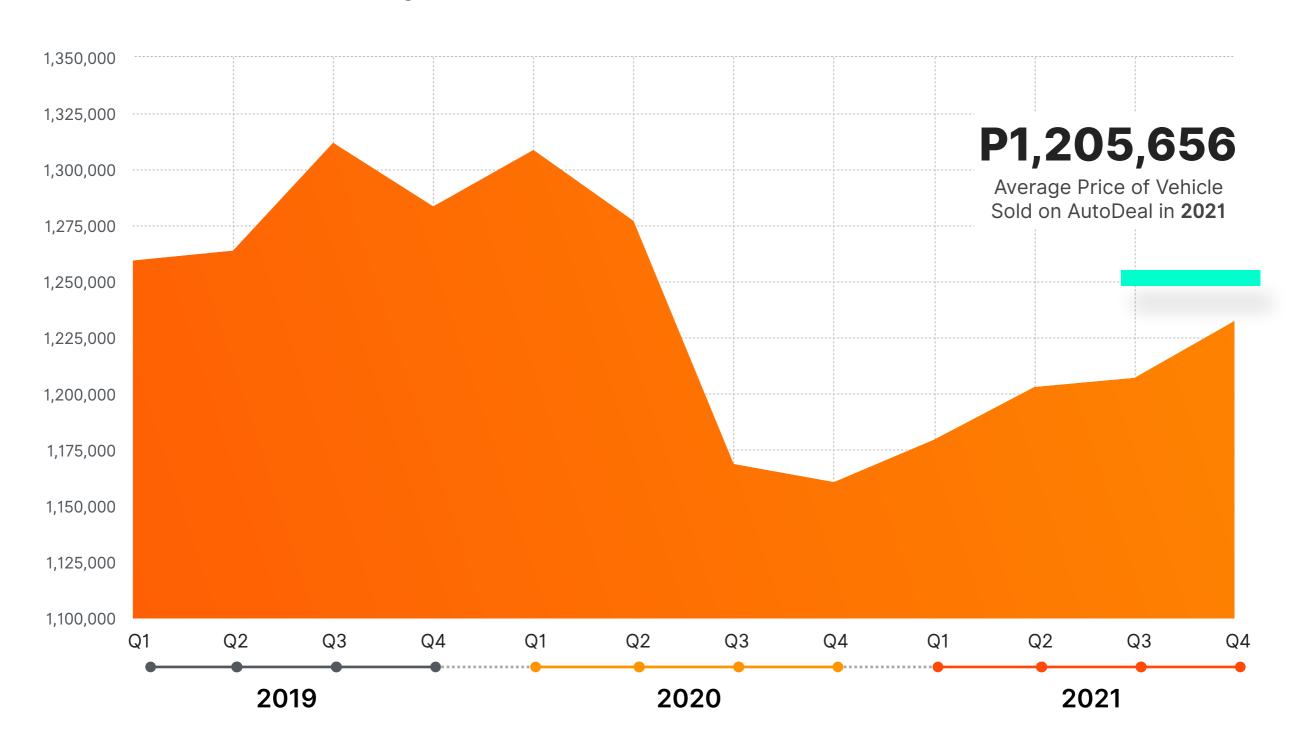
New Car Sales by SRP

Despite higher interest in entry-level products; average final transaction prices continue to grow despite of higher interesting entry-level vehicles.

2021 AutoDeal Vehicle Transactions by Price Range



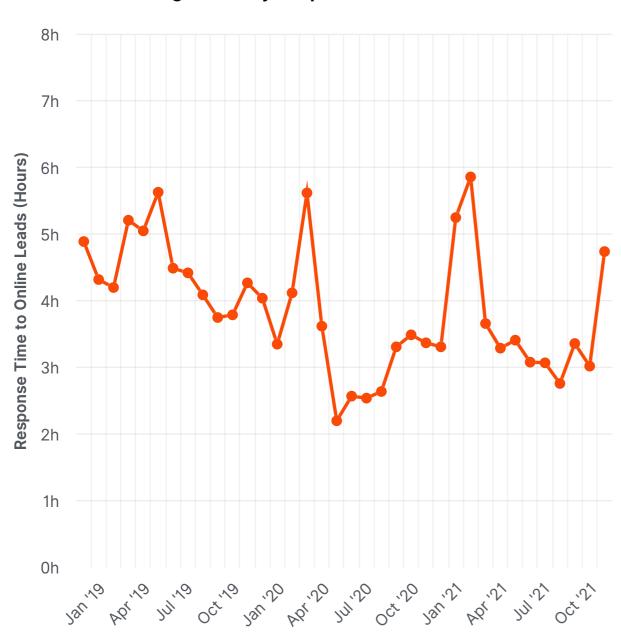
Average Price of Vehicle Sold on AutoDeal (2019 - 2021)



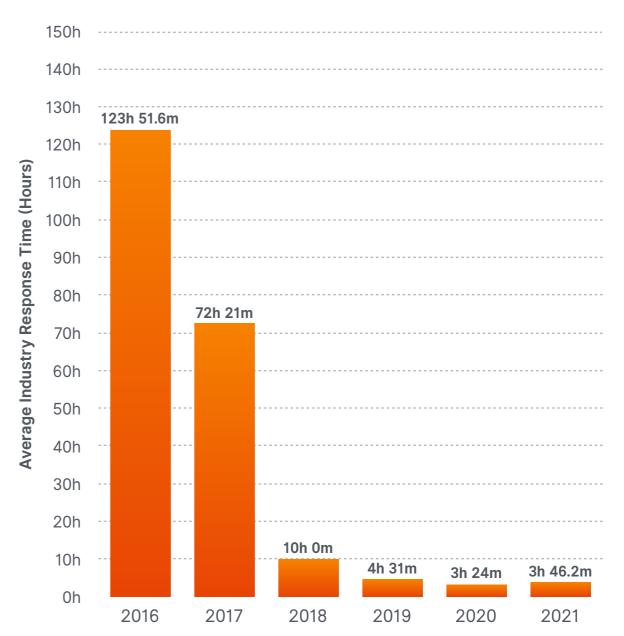
New Car Dealer Industry Response Time 5 Star Agent Reviews of 2021

New Car Dealer Industry Response Time

Average Industry Response Time (2019 - 2021)



Average Industry Response Time (2016-2021)





Here are some of our favorite agent reviews of 2021

STARS





Darz Delim Mitsubishi Motors, Global City





Awesome customer service and prompt response on all the inquiries. Bought the unit by communicating online without meeting Ms.Darz Delim. She's always attentive and suggests better options to choose from. We were hesitating to make a deposit because we haven't met her but her attitude and professionalism comforted us to trust her. She wouldn't fail your expectations. Thank you very much once again to Ms. Darz Delim for making this transaction wonderful.

Sai Kyaw
 Purchased a Mitsubishi Montero Sport GT 2.4 4x2 AT



Patrick Emson Paguinto Ford, Libis





Emson was very helpful and professional, he went above and beyond to provide a smooth transaction and secure me the unit i wanted. He's also very knowledgable in the product and guided me through the various features of the territory after the sale had already been completed.

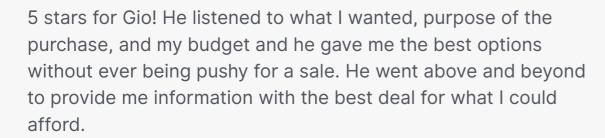
Jerman Sorongon
Purchased a Ford Territory 1.5 EcoBoost Titanium+ CVT



Gio Palaroan Kia, Baguio



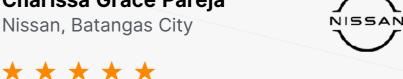








Charissa Grace Pareja Nissan, Batangas City



Very accommodating, reliable, and adaptable in current pandemic set-up. Thought that buying a car would be stressful and tedious, but she made it hassle-free, from fast car loan approval, to delivering the unit right in front of our doorsteps. Never thought that the whole process of buying a car would be this easy.

 Napolien Barcelona Purchased a Nissan Terra 2.5 VE 4x2 AT



Rachelle Alhambra Mazda, Quezon Avenue



Rachelle Alhambra is a very competent, warm and very professional sales executive. Had it been another person I was dealing with at Quezon Avenue Mazda, I probably chose another dealership. So owing to her, I quit calling other auto dealerships because of her engaging personality and presentation of the product. I believe she is an important asset of the Quezon Avenue Mazda when it comes to selling cars. I will refer your auto dealership to some of my friends who might be interested in your products.

Ronnie Trillana Purchased a Mazda CX-9 2.5 Signature AWD









Roselyn Muyot MG, Congressional







Gamil Gregorio Toyota, Manila Bay





Agent is the best. She is very persuasive and will always find a way to accommodate your needs. She will never say die until you exhaust every possible options available. Highly recommended if you're looking for a new unit to buy

Kurt Ranzel Flores Purchased a MG ZS 1.3 T Trophy I was very impressed by the way Mr. Gamil Gregorio handled my inquiry. The effort, time, and patience of this person is amazing. Not only he promise me a hassle free release but he also delivered. I will never hesitate to recommend Mr. Gamil Gregorio to my friends and family. Kudos and Thank you!

• Precious Espiritu Purchased a Toyota Hiace Commuter 3.0 MT



Prynzes Macapagal Geely, Makati





Ms. Prynzes is very accommodating, quick to respond and transparent. She offered me a great package for my chosen vehicle and guided me on the documents needed. My transaction was very fast and smooth. She is also friendly and courteous. I highly recommend her and I'm pleased with the level of professionalism she showed. So for those looking for a quality sales agent and best deals for any Geely vehicle, she is the person to look for. Thank you Ms. Prynzes! Kudos!

 Gibson Uy Purchased a Geely Coolray 1.5 Premium Turbo





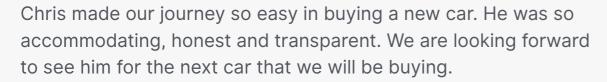
S ~ 4 S



Christopher Algarne Suzuki Auto, Alabang











Rodney Rommel Gumalal Isuzu, Dipolog





Had a great experience buying our first Isuzu D-MAX pickup truck. Rodney was very helpful, the transaction was very smooth, and Isuzu Dipolog was very accommodating. Thanks again Rodney and Isuzu Dipolog for the great help.

Doki Jimeno
 Purchased a Isuzu D-MAX RZ4E 4x2 LS MT



Sheryl Sadsad Honda Cars, Quezon City



Among the dealerships and agents I contacted, Sheryl was the first to respond. The whole process from my initial inquiry was much more convenient and MUCH FASTER than I thought it would be because of the quick turnaround and Sheryl's timely responses, whether it was a complex question or a minor matter I just happened to be curious about as a first time buyer. I would highly recommend Sheryl and will definitely contact her again when it's time for an upgrade.

Mary Grace Torralba
 Purchased a Honda City 1.5 RS CVT









Raven Capada Changan, Manila Bay





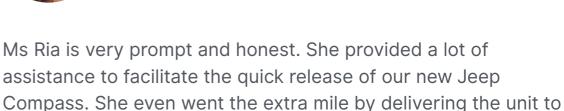
Ria Anne Guzman Jeep, Greenhills





Very responsive and accommodating. He really helped a lot most especially with updates and follow ups needed. He sure is a great person and a great sales agent. Deserves a commendation. Thank you Raven!

Kenneth Acosta Purchased a Changan CS35 Plus 1.4 DCT



our house on a weekend. Thanks Ms Ria, much appreciated!

 Rogel Garcia Purchased a Jeep Compass 1.4 Longitude AT



Ima Perez Chery, Sta. Rosa





S

~

4

S

I just wanted to give a Special thanks to Ms. Ima, Ma'am Irene and all Chery Sta. Rosa Team for helping me complete with my purchase of Tiggo 5x AT Car. They're so attentive and supportive. Ms. Ayma was very helpful. She answered every questions & sent some pictures and videos as requested. The entire experience was Great. We've been transferred for twice due to our desired unit. But they guided us to the right one!! Thank you RCBC and Chery Auto Sta. Rosa. Excellent Job!

Romeo Tupas III Purchased a Chery Tiggo 5X AT





What are Used Car Buyers shopping for?

AutoDeal Used Car Inquiries by brand

AutoDeal Used Car Inquiries by Vehicle Model Year

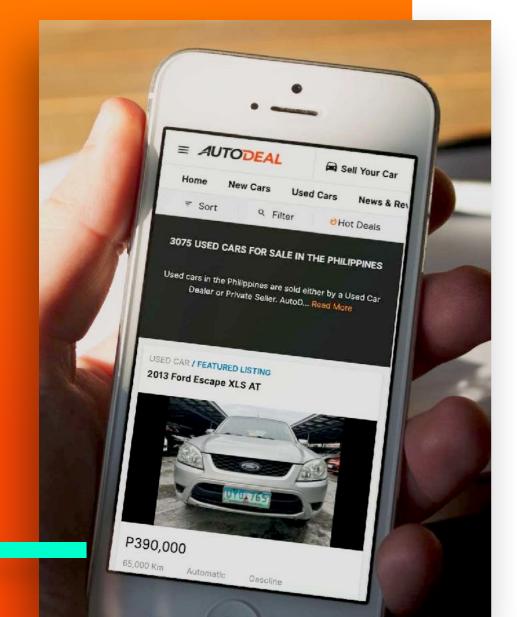
Used Car Inquiries by Listed Price

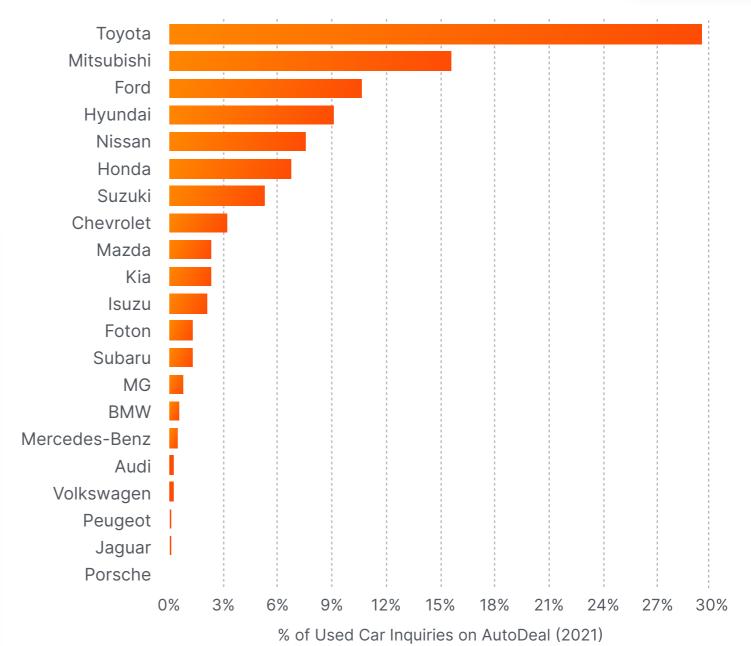
Top 40 Most Inquired for Used Car Models

TOP20

Used Car Inquiries by Brand

What are used car buyers shopping for?













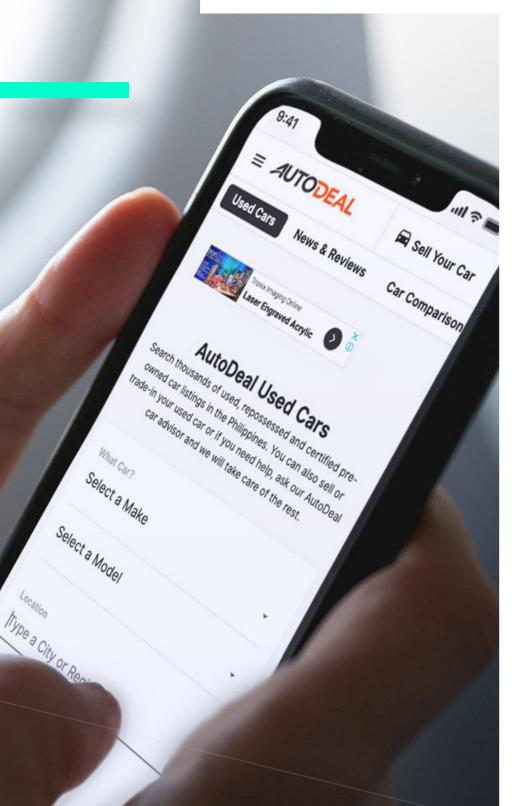


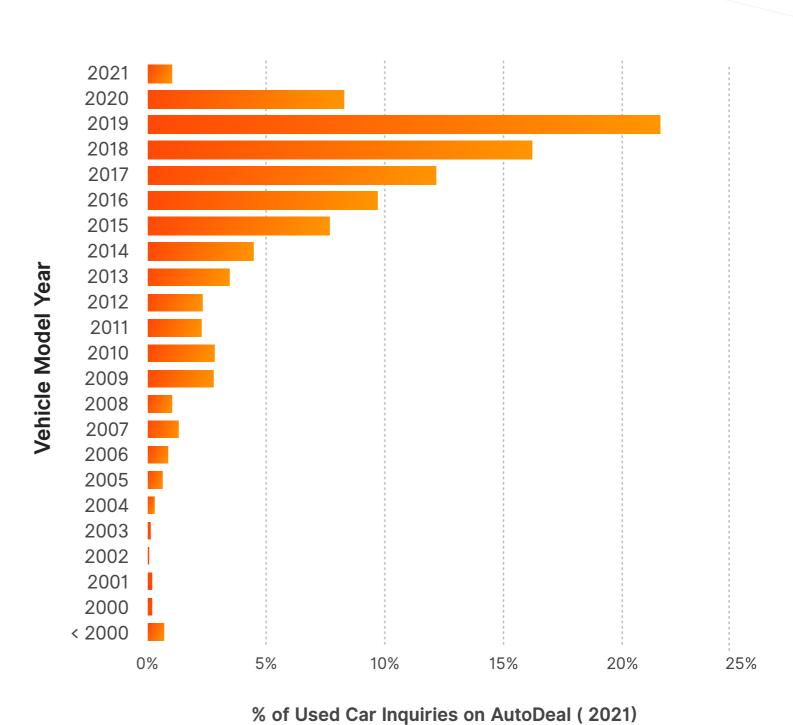


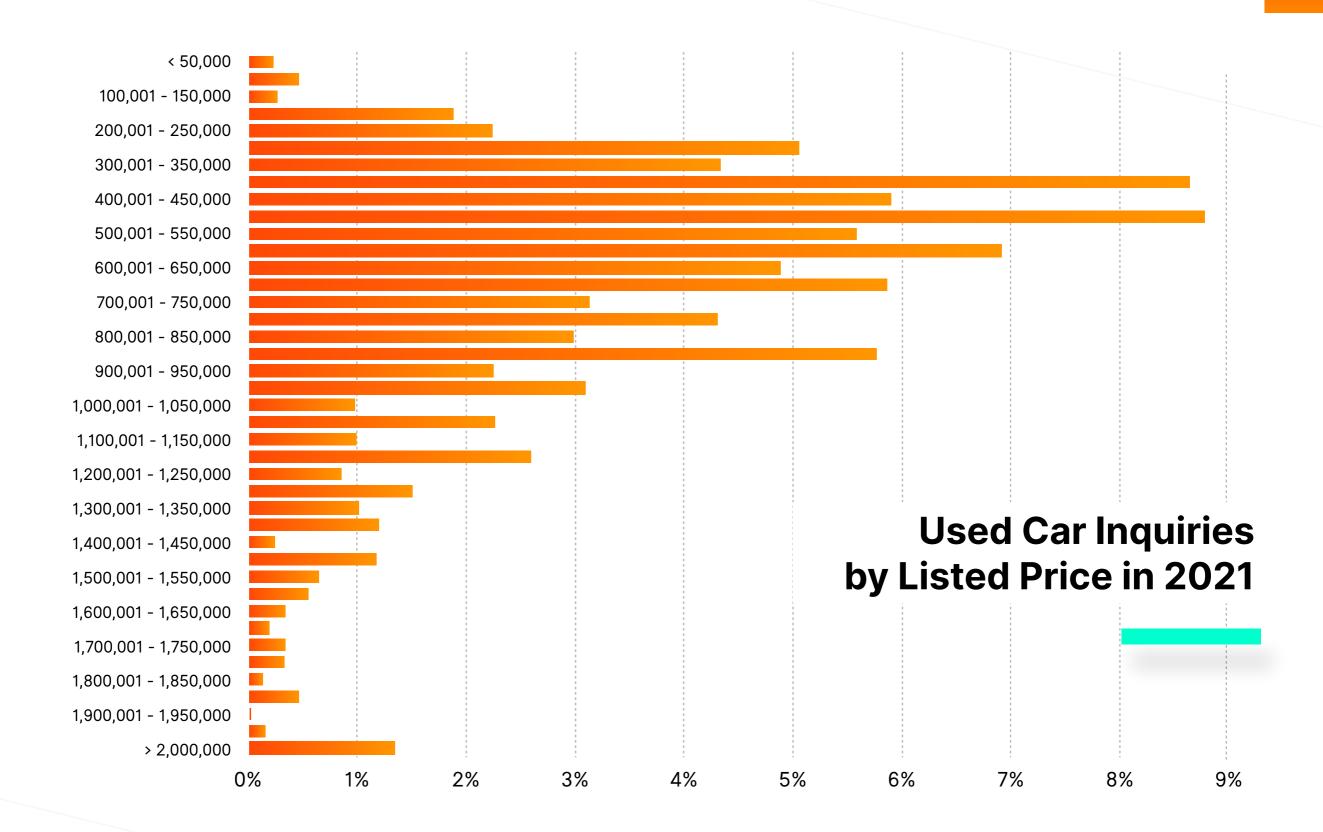




Used Car Inquiries by Vehicle Model Year





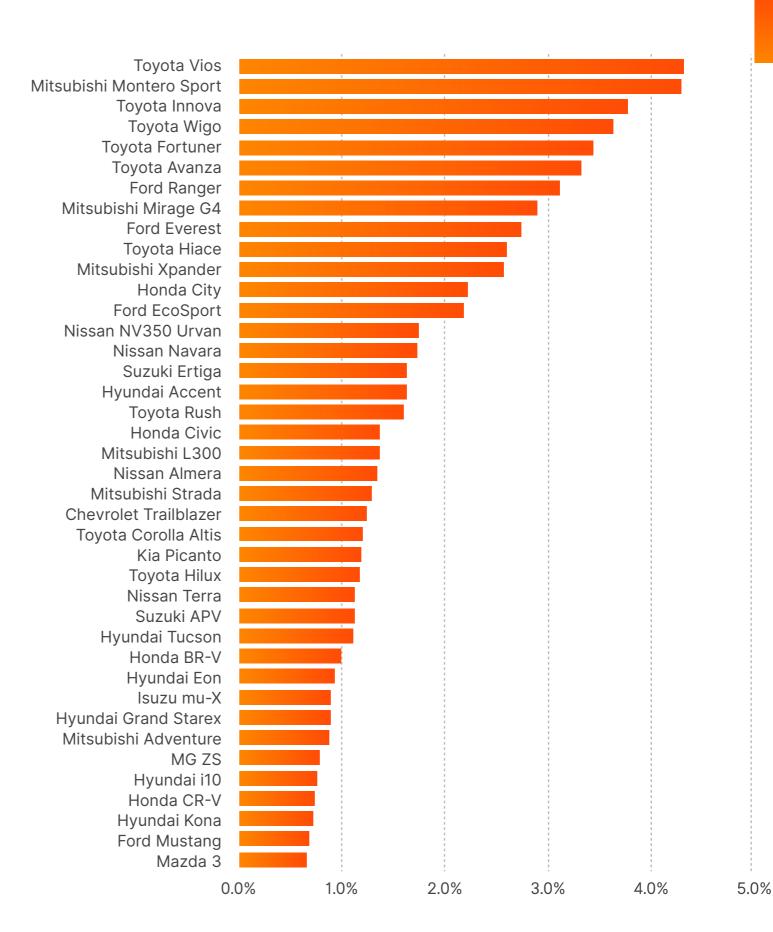


TOP40





Most inquired used car models in 2021





MOTODEAL

Join the Philippines no.1 online automotive marketplace.

23KFacebook Likes

1.7K
E-Mail Subscribers

61.8K
YouTube Subscribers

3,010
Instagram Followers

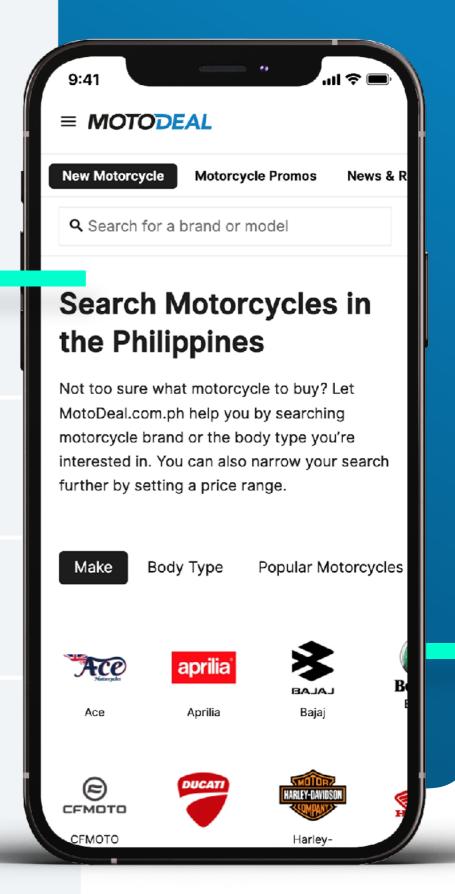
836,000Monthly Visits

565,000 Monthly Unique

2,262,000
Monthly Pageviews

00:02:01

Ave. Visit Duration



Most Inquired for Brands

Which brands were online consumers drawn to in 2021?





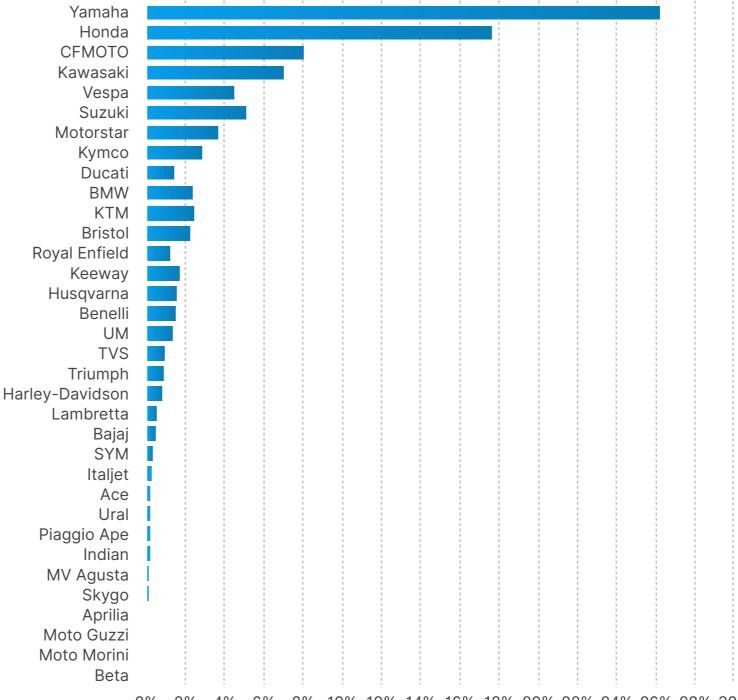






Kawasaki



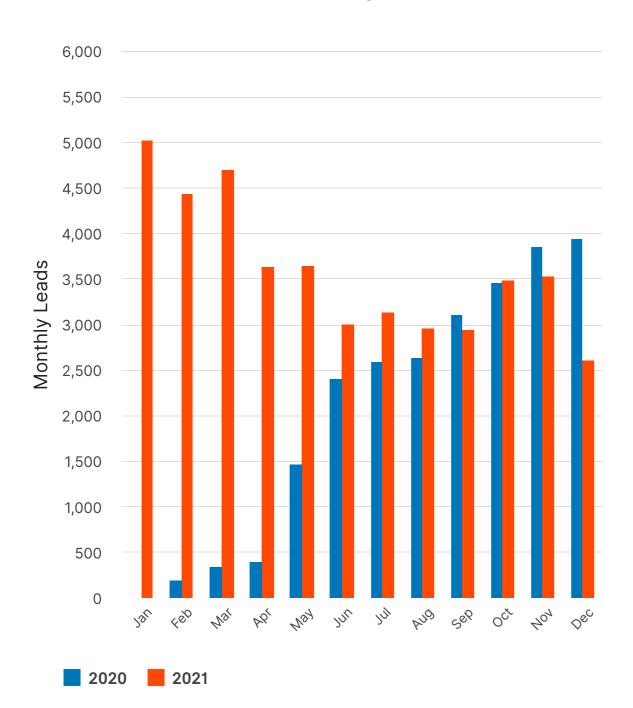


0% 2% 4% 6% 8% 10% 12% 14% 16% 18% 20% 22% 24% 26% 28% 30%

% of Total MotoDeal Inquiries (2021)

Motorcycle Quotes & Inquiries

Total MotoDeal Inquiries Generated

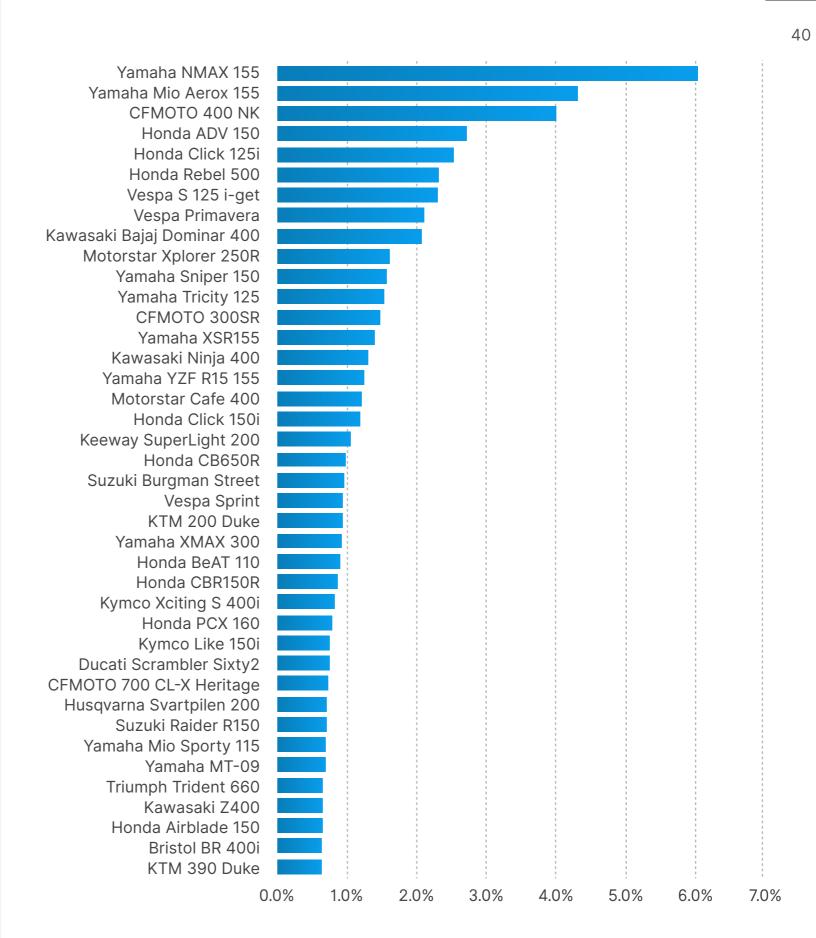


MotoDeal Inquiries by motorcycle body type 6% 8% 41% 8% 11% 17% Scooter Commuter Cruiser Naked Sport Bike Adventure Touring Cafe Racer Dirt Bike Super Sport Bike Sport Touring Tricycle Touring Supermoto Sports Tourer

Data Source: Based on leads (quotes, inquiries, test-drives) generated on MotoDeal.com.ph.

TOP40





AD

AutoDeal Group Profile

AutoDeal Video

Top 5 Most viewed videos of 2021 AutoDeal & MotoDeal

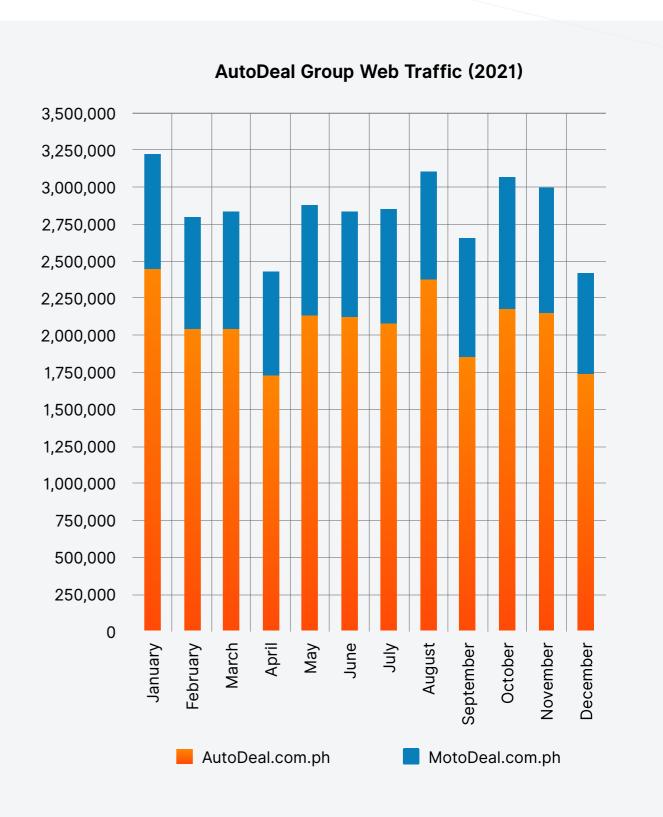
MotoDeal Video

AD

AutoDeal Group Profile

We are the no.1 automotive marketplace in the Philippines.

		AUTODEAL	MOTODEAL	AD & MD Total
Januai	ry	2,447,499	773,802	3,221,301
February		2,041,015	761,231	2,802,246
March		2,038,415	797,045	2,835,460
April		1,726,228	699,762	2,425,990
May		2,128,698	750,751	2,879,449
June		2,126,768	711,792	2,838,560
July		2,081,290	771,869	2,853,159
August		2,374,393	727,311	3,101,704
September		1,854,580	802,618	2,657,198
October		2,180,342	889,923	3,070,265
November		2,154,875	837,924	2,992,799
December		1,735,862	685,438	2,421,300
Total:		24,889,965	9,209,466	34,099,431
0	Instagram Followers	24.7K	3,003	
	YouTube Subscribers	341K	61.3K	
f	Facebook Followers	684K	37K	
×	E-Mail Subscribers	210K		





2022 Nissan Almera Review | Behind the Wheel

157K views + 2 months and



2022 Isuzu mu-X Review Behind the Wheel

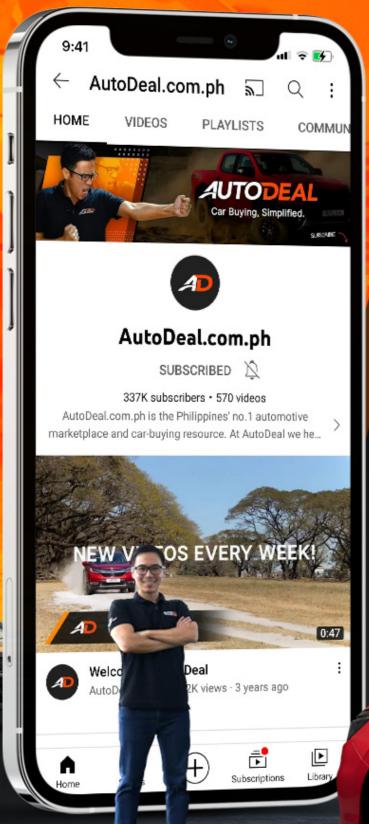
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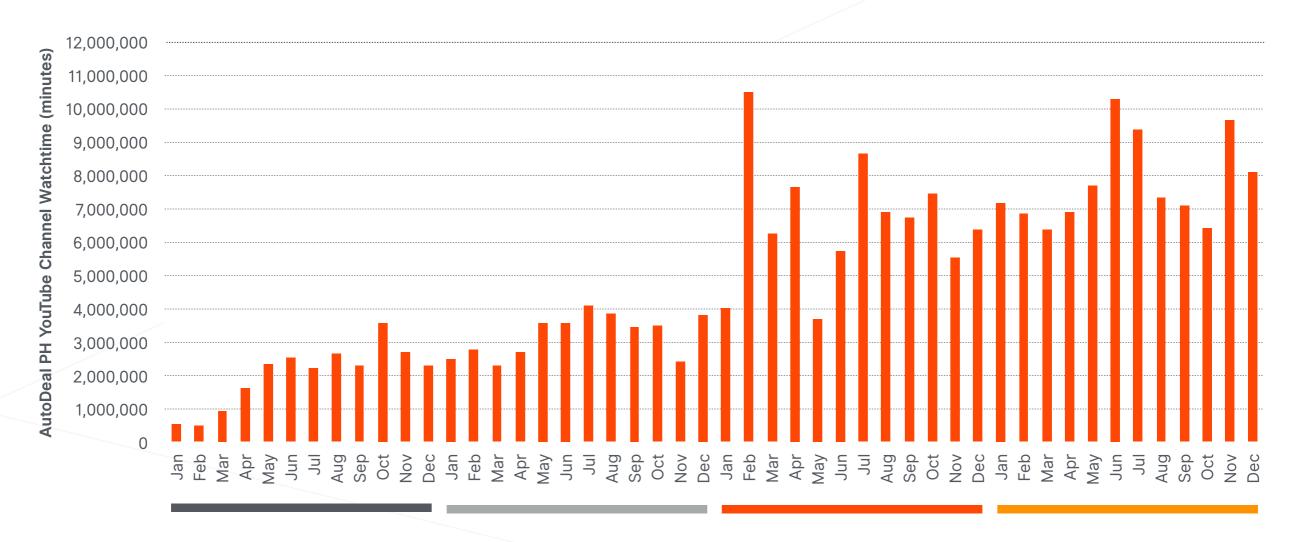
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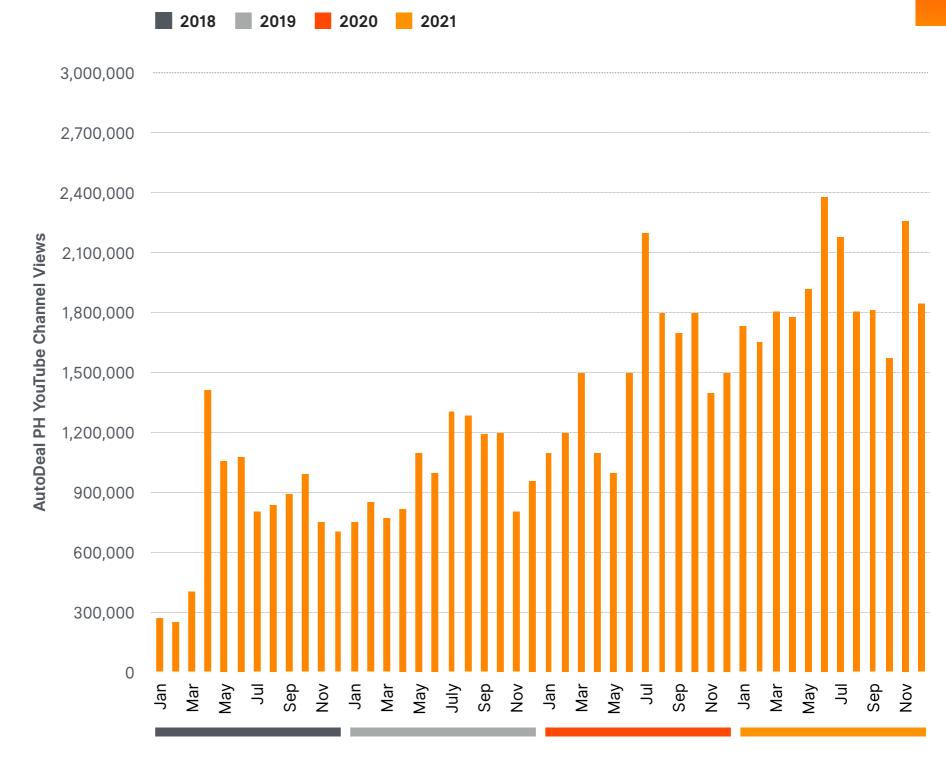
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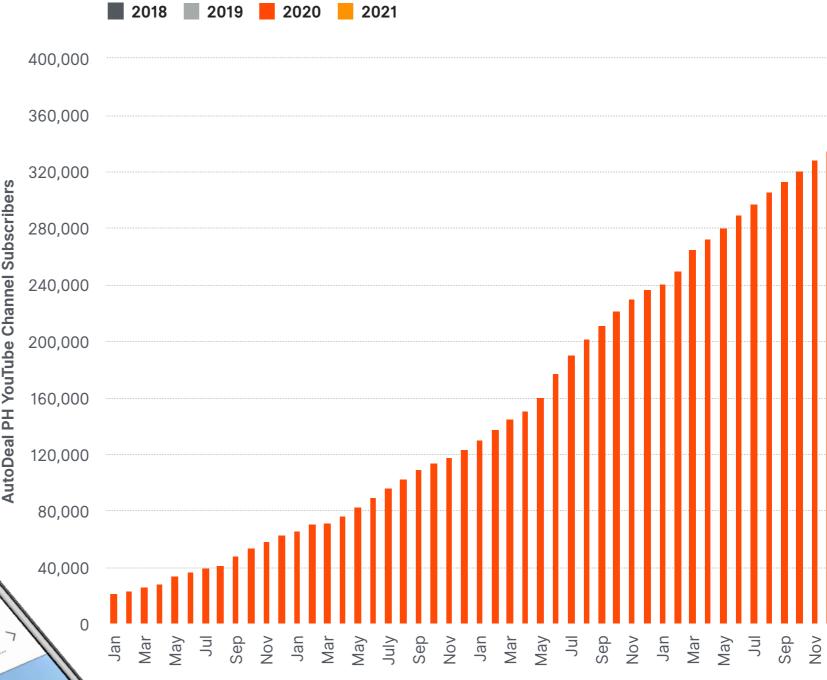
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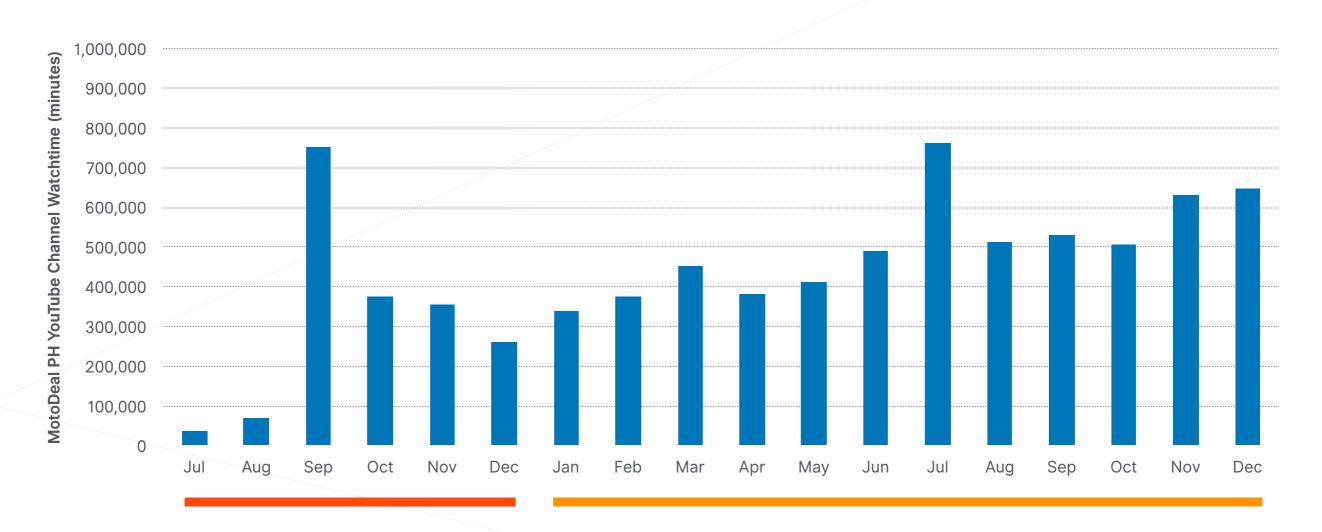


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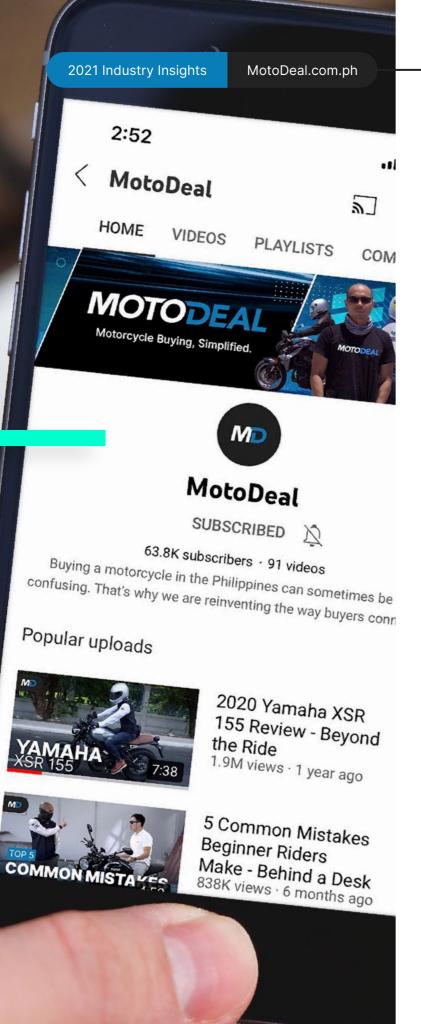




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