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## Introduction \& Summary

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

## New Car Consumer Interest \& Leads

We explore all data on lead volumes, lead sources and consumer interest levels.

## 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.

## Dealer Talk

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

## Used Car

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

## MotoDeal

What are the key trends from the Philippines no. 1 online motorcycle buying website.

## 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 ta 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.

## 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

## SUMMARY

AutoDeal is the no． 1 online automotive marketplace in the Philippines．
$\equiv$ AUTODEAL 国 Sell Your Car Home New Cars Used Cars News \＆Revie

## Car Buying， Simplified．

Compare prices on new \＆used cars from official dealers across the Philippines．

Search New Cars

Search Used Cars
Quotes \＆Test Drives
Serviced to dealers from buyers inquiring on AutoDeal \＆MotoDeal

## 586，622

Conversations
Back and forth messages between prospective car buyers and dealers

くくゝ
Get the best deal on the Kia Stonic．
Compare prices，promos and dealer offers．


# Quick FACTS 

Key take home points from our report

## E <br> 81.69\%

Of AutoDeal buyers shop for vehicles using their smartphone.

## P 62 Days

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

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

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

## Total AutoDeal Leads Serviced to Dealers (2020 vs. 2021)

AutoDeal Leads (2015-2021)



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

## Leads by Market Segment

Based on AutoDeal inquiries for major vehicle categories


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

## Inquiring \& Buying Trends

How soon are consumers looking to buy?

0-3 Month Buying Period



3-6 Month Buying Period


1-2 Year Buying Period

| $\frac{\overline{3}}{3}$ | 10\% |
| :---: | :---: |
|  | 9\% |
| マ | 8\% |
| $\bigcirc$ | 7\% |
| $\begin{aligned} & \text { OT } \\ & \text { 응 튼 } \end{aligned}$ | 6\% |
|  | 5\% |
| ¢ | 4\% |
|  | 3\% |
|  |  |
| 4 |  |
|  | \% |



## Looking to Purchase within 30 DAYS from inquiry

2020


## LEADS BY LOGATION



## Metro Manila 26.40\%

| 1 | Quezon City | $6.14 \%$ | - | 1 |
| :---: | :--- | :---: | :---: | :---: |
| 2 | Manila | $3.07 \%$ | - | 2 |
| 3 | Makati City | $2.27 \%$ | - | 3 |
| 4 | Pasig City | $2.10 \%$ | - | 4 |
| 5 | Caloocan City | $1.77 \%$ | - | 5 |
| 6 | Taguig City | $1.72 \%$ | - | 6 |
| 7 | Parañaque City | $1.67 \%$ | $\Delta$ | 7 |
| 8 | Las Piñas City | $1.62 \%$ | $\nabla$ | 8 |
| 9 | Mandaluyong City | $1.39 \%$ | - | 9 |
| 10 | Muntinlupa City | $1.07 \%$ | $\Delta$ | 10 |

## Visayas <br> 9.45\%

| 1 | Iloilo City | $1.43 \%$ | $\Delta$ | 1 | Davao City | $2.97 \%$ |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| 2 | Cebu City | $1.37 \%$ | $\nabla$ | 2 | Cagayan De Oro City | $1.89 \%$ |
| 3 | Bacolod City | $1.14 \%$ | - | 3 | General Santos City | $1.05 \%$ |
| 4 | Tacloban City | $0.71 \%$ | - | 4 | Zamboanga City | $0.76 \%$ |
| 5 | Lapu-Lapu City | $0.54 \%$ | - | 5 | lligan City | $0.59 \%$ |
| 6 | Mandaue City | $0.48 \%$ | - | 6 | Butuan City | $0.58 \%$ |
| 7 | Dumaguete City | $0.46 \%$ | - | 7 | Cotabato City | $0.48 \%$ |
| 8 | Tagbilaran City | $0.33 \%$ | - | 8 | Tagum City | $0.41 \%$ |
| 9 | Talisay City | $0.28 \%$ | - | 9 | Koronadal City | $0.37 \%$ |
| 10 | Ormoc City | $0.25 \%$ | - | 10 | Pagadian City | $0.32 \%$ |

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


CENTRAL LUZON: Top 20 Locations


CALABARZON: Top 20 Locations


## 2021 Leads by Device

Inquiries made via mobile devices continue to rise.

2.34\%

On Tablets
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 ?


## TOP40

Most inquired nameplates in 2021



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

## TOP40

Most inquired nameplates in 2021



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

# SALES \& CONVERSION 

2021 Top Selling New Vehicles<br>New Car Conversion Timeline<br>New Car Sales by Segment<br>New Car Sales by SRP

## TOP SELLING NEW VEHICLES

Top Selling Nameplates on the AutoDeal Platform in 2021

## Mid-size SUV



## Subcompact Cars



Subcompact Crossover


MPV




Commercial Vehicle

wrusex

ISUZU
Isuzu
TRAVIZ
MITSUBISHI L300
\& Suzuki
suzukı CARRY

Pickup Truck


NISSAN NAVARA
Ford
RANGER RUSH

Compact Car


HONDA CIVIC


Compact Crossover

sma FORD TERRITORY

| Chery TIGGO 7 PRO | Mazda |
| :--- | ---: |
| Chazan $\mathrm{CX}-5$ |  |

Van


TOYOTA HIACE

## 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.


[^0]
## New Car Sales by Segment

Transaction proportions of vehicles sold on AutoDeal*


Note: This graph shows the breakdown of sales transactions recorded through the AutoDeal platform from 2017 to 2021

## 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



Data Source: Based on confirmed sales generated on AutoDeal.

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


# OUTSTANDING AGENTS 

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

## New Car Dealer Industry Response Time

Average Industry Response Time (2019-2021)


1h

Oh


Average Industry Response Time (2016-2021)



Here are some of our favorite agent reviews of 2021


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 4×2 AT


## Patrick Emson Paguinto

Ford, Libis

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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
11

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

5 stars for Gio! He listened to what I wanted, purpose of the purchase, and my budget and he gave me the best options without ever being pushy for a sale. He went above and beyond to provide me information with the best deal for what I could afford.

Amefil Kim
Purchased a Kia Sportage 2.0 4x2 LX AT Dsl

Charissa Grace Pareja
Nissan, Batangas City

$\star \star \star \star t$

## Rachelle Alhambra

Mazda, Quezon Avenue
$\star \star \star \star \star$

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
$\star \star \star \star \star$

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



## Gamil Gregorio

Toyota, Manila Bay

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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

## - Kurt Ranzel Flores

Purchased a MG ZS 1.3 T Trophy

Christopher Algarne
Suzuki Auto, Alabang
$\star \star t \star t$

Chris made our journey so easy in buying a new car. He was so accommodating, honest and transparent. We are looking forward to see him for the next car that we will be buying.

## - Catalina Porsovigan

Purchased a Suzuki XL7 GLX AT


## Rodney Rommel Gumalal

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

## Isuzu, Dipolog

## ISUZU

$\star \star \star t \star$

## Sheryl Sadsad

Honda Cars, Quezon City
$\star \star \star \star \star$

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


## Raven Capada

Changan, Manila Bay

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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!

## CHANGAN



## Ria Anne Guzman

Jeep, Greenhills


Ms Ria is very prompt and honest. She provided a lot of assistance to facilitate the quick release of our new Jeep Compass. She even went the extra mile by delivering the unit to our house on a weekend. Thanks Ms Ria, much appreciated!

## - Rogel Garcia

Purchased a Jeep Compass 1.4 Longitude AT

## Jeep

- Kenneth Acosta

Purchased a Changan CS35 Plus 1.4 DCT

# USED CARS 

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

## © O Used Car Inquiries by Brand




## Used Car Inquiries by Vehicle Model Year




## TOP40



Most inquired used car models in 2021



## MOTODEAL

Join the Philippines no. 1 online automotive marketplace.

## 23K

Facebook Likes
61.8K
YouTube Subscribers
3,010
Instagram Followers


## 836,000 <br> Monthly Visits

565,000
Monthly Unique
2,262,000
Monthly Pageviews

00:02:01
Ave. Visit Duration

## Search Motorcycles in the Philippines

Not too sure what motorcycle to buy? Let MotoDeal.com.ph help you by searching motorcycle brand or the body type you're interested in. You can also narrow your search further by setting a price range.


## Most Inquired for Brands

Which brands were online consumers drawn
to in 2021?

*) YAMAHA

sUZUKI

Yamaha
Honda CFMOTO Kawasaki

Vespa Suzuki Motorstar

Kymco
Ducat i BMW KIM Bristol Royal Enfield Keeway Husqvarna

Benelli
UM
TVS
Triumph Harley-Davidson Lambretta Bajaj SYM Italjet Ace Ural Piaggio Ape Indian MV Agusta

Skygo
Aprilia
Moto Guzzi Koto Morini Beta

## Motorcycle Quotes \& Inquiries

Total MotoDeal Inquiries Generated


MotoDeal Inquiries by motorcycle body type


## TOP40


nameplates in 2021


# INSIDE <br> AUTODEAL 

AutoDeal Group Profile<br>AutoDeal Video<br>Top 5 Most viewed videos of 2021 AutoDeal \& MotoDeal<br>MotoDeal Video

## AutoDeal Group Profile

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

| AUTODEAL | MOTODEAL | AD \& MD Total |
| :---: | :---: | :---: |
| 2,447,499 | 773,802 | 3,221,301 |
| 2,041,015 | 761,231 | 2,802,246 |
| 2,038,415 | 797,045 | 2,835,460 |
| 1,726,228 | 699,762 | 2,425,990 |
| 2,128,698 | 750,751 | 2,879,449 |
| 2,126,768 | 711,792 | 2,838,560 |
| 2,081,290 | 771,869 | 2,853,159 |
| 2,374,393 | 727,311 | 3,101,704 |
| 1,854,580 | 802,618 | 2,657,198 |
| 2,180,342 | 889,923 | 3,070,265 |
| 2,154,875 | 837,924 | 2,992,799 |
| 1,735,862 | 685,438 | 2,421,300 |
| 24,889,965 | 9,209,466 | 34,099,431 |
| 24.7K | 3,003 |  |
| 341K | 61.3K |  |
| 684K | 37K |  |
| 210K |  |  |

AutoDeal Group Web Traffic (2021)




## / AutoDealPH

## YouTube Monthly Watchtime






Toyota Fortuner 2.8 LTD 4x4 AT
Behind The Wheel | Published May 7, 2021


- 413,700

Views
0
4,100
Likes
Comments

2021 Isuzu D-Max Review
Behind The Wheel | Published April 9, 2021

©
512,800
Views
(1)

5,900
Likes


430
Comments

## 2021 Kia Stonic Review

Behind The Wheel \| Published February 17, 2021

( 397,000
Views
Views
(1)

4,400
Likes


374
Comments

Top 10 7-seaters on a budget
Behind A Desk | Published March 31, 2021


O
414,800
Views
(1)

5,100
Likes
356
Comments

## 2021 Toyota Fortuner Review

Behind The Wheel \| Published January 29, 2021

/ MotoDealPH
YouTube Monthly Watchtime



MotoDeal YouTube Monthly Watchtime

HOME VIDEOS PLAYLISTS COM

## MOTODEA

Motorcycle Buying, Simplified.

MotoDeal
SUBSCRIBED
63.8 K subscribers $\cdot 97$ videos

Buying a motorcycle in the Philippines aras confusing. That's why we are reinventing the way sotimes be Popular uploads


MotoDeal YouTube Subscribers


## TOP

## MOST VIEWED VIDEOS

 OF 20215 Common Mistakes
Beginner Riders Make
Behind A Desk | Published July 23, 2021

Husqvarna Svartpilen 401 Review Beyond The Ride | Published March 12, 2021


- 131,000

Views

(1)
2,500
Likes

288
Comments

Comments
Top 5 Most Affordable 400cc Bikes
Behind A Desk | Published February 18, 2021

( 180,500
Views
(1) 2,200

Likes

2021 Ducati Scrambler Nightshift Review
Beyond The Ride | Published June 4, 2021


Yamaha Mio Aerox 155 Review
Beyond The Ride | Published November 12, 2021


## AUTODEAL

## THE PHILIPPINES' NO. 1 ONLINE AUTOMOTIVE MARKETPLACE

Helping thousands of customers compare vehicles, find promos and connect with car dealers every month.

## AutoDeal.com.ph

Unit 102 G/F UMC Building, 2232
Chino Roces Avenue, Makati City

## For Partnerships

ANNIE SANTOS
Head of Business Development
annie@autodeal.com.ph

ROMMEL LIM
Head of Dealer Accounts
rommel.lim@autodeal.com.ph

## All Other Inquiries

info@autodeal.com.ph
T: 88941891


[^0]:    *Based on sales tracked in AutoDeal's Lead Management System

