NSIGHTS AutoDeal.com.ph | Philippine Automotive Industry Report Q1 2019 - Vol. VIII VIOS AUTODEAL

Cars Sold, Everyday.



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

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Inside AutoDeal

What's new, what's next – we give you the lowdown on the progress of the Philippines no.1 online automotive marketplace.

Important:

AutoDeal.com.ph (The SirQo Group Inc.) prepared all the content in this report to represent the general data about online marketing for the Philippine automotive industry. This data is given in summary, and as such, all information is to be used and interpreted at the reader's 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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Going the Distance

As we sail through the first trimester of 2019, it's important to take note of an increased sense of optimism that appears to be emerging within the Philippine automotive industry; a stark comparison to the bleak outlook that we all experienced during the same period of time last year.



It's impossible to ignore that things however are changing; brands are reshuffling their priorities while others are reinventing themselves as an increased number of players enter the fray. Among several major events that unfolded during the first quarter, we've seen an all-new Kia brand get relaunched by Ayala Corp., which now handles the reigns as the official distributor in the country.

With this, comes the all-new Kia Soluto, a subcompact that like many of its competitors is trying to appeal to a new generation of first-time car buyers. The Soluto has to compete with a packed field of fresh new subcompacts, including the all-new Vios, Suzuki Dzire and Hyundai Reina. Moreover, it will find itself pit against a maturing second-hand market, where subcompact inventory and inquiries appear to be in abundance. It'll be interesting to see what sales and marketing strategies will be deployed, and which will ultimately prove to be effective in winning over the ever so important first-time car buyer.

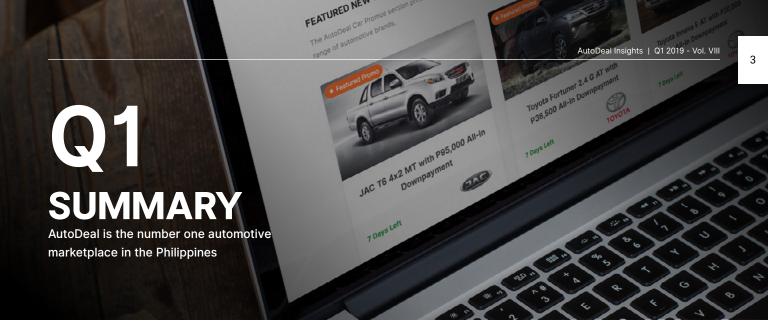
As the standard of vehicles getting better, it's never been more important for brands and dealers to enhance the customers' ownership experiences – whether through servicing and maintenance or through customer lifecycle initiatives such as a streamlined trade-in process. These continue to be areas, that we, at AutoDeal, have shown an increased interest in over

the last twelve months, leading us to release the first version of our Car Servicing section in late 2018. This new section will join several new areas of expansion for AutoDeal in 2019; others of which are briefly hinted at throughout this Industry Insights Report.

Backing up these areas of expansion are increased audience figures and tracked sales transactions that are supported by our constantly evolving technology and commitment to delivering to Filipino consumers our promise of "Car Buying, Simplified."

This version of our Industry Insights Report is jam-packed with more information than ever before, based on data collected from almost 7 million website visits during the first quarter of 2019 alone. This data, together with the updates on our expanded vision for AutoDeal, will hopefully provide good testament for how we plan to continue to go the distance for our brand and dealer partners across the country.

Christopher L. Franks
AutoDeal Chief Operating Officer





▲ 6.71%

6,869,051 WEBSITE VISITS

By Car Buyers, Vehicle Owners, and Enthusiasts



13.69%

80,820 QUOTES & TEST DRIVES

Serviced to dealers from buyers inquiring on AutoDeal.com.ph



3,245 CONFIRMED PURCHASES

Tracked and confirmed from users who purchased in Q1 2019



V 0.65%

112,637 CONVERSATIONS

Back and forth messages between prospective car buyers and dealers



QUICK FACTS

Key take home points from our Q1 Report



74.45%

of AutoDeal.com.ph buyers shop for vehicles using their smartphones



50 Days

is the average time that it takes
AutoDeal.com.ph buyers to purchase
after their online inquiry



P1.26M

is the average price of vehicles sold on AutoDeal.com.ph in Q1 2019



30 minutes

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

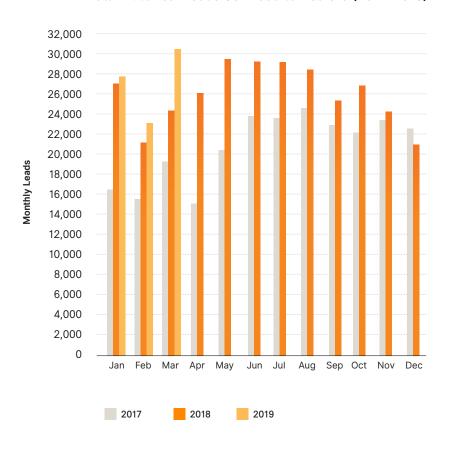
Note: Data indicated is from the analysis of visitors accessing AutoDeal.com.ph from January 1, 2019 to March 31 2019



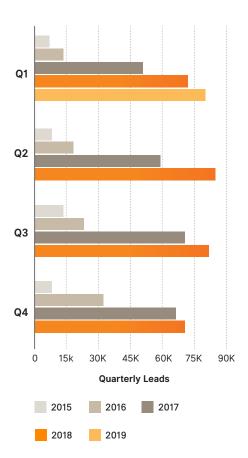
QUOTES, TEST-DRIVES & INQUIRIES

Total online car buying inquiries are up by 12% year on year, up by 13.66% from Q4 2018

Total AutoDeal Leads Serviced to Dealers (2017-2019)



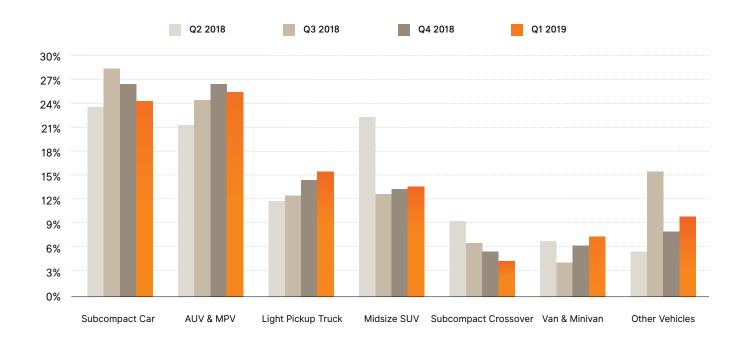
AutoDeal Leads (2015-2019)

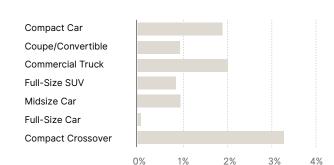


Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.com.ph.

LEADS BY MARKET SEGMENT

Based on AutoDeal inquiries for major vehicle categories





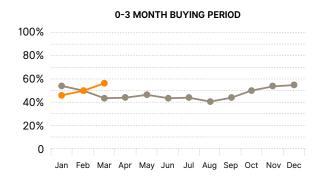
OTHER VEHICLES

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

INQUIRING & BUYING TRENDS

There's an increasing number of buyers looking to purchase within 0-3 months

Inquiry to Sale Transaction Timeframe













LEADS BY LOCATION

AutoDeal accomodated inquiries from 374 towns and cities in Q1 2019

Metro Manila

33.45%

% of Total Leads

1	Quezon City	7.77%	-
2	Manila	4.27%	-
3	Makati City	3.19%	-
4	Pasig City	2.63%	-
5	Taguig City	2.44%	
6	Parañaque City	2.15%	\blacksquare
7	Caloocan City	1.94%	-
8	Las Pinas City	1.92%	-
9	Mandaluyong City	1.62%	-
10	Marikina City	1.18%	

Visayas

9.58%

_		% OF TOTAL L	caus
1	Cebu City	1.50%	-
2	Iloilo City	1.14%	-
3	Bacolod City	0.93%	-
4	Lapu-Lapu City	0.56%	
5	Tacloban City	0.52%	
6	Mandaue City	0.47%	\blacksquare
7	Tagbilaran City	0.33%	
8	Dumaguete City	0.31%	\blacksquare
9	Talisay City	0.22%	-
10	Ormoc City	0.17%	

Luzon

44.46% % of

70	OI	rotai	Leaus

1.09%

1	Imus City	2.03%	A
2	Bacoor City	2.00%	•
3	Dasmariñas City	1.76%	
4	Angeles City	1.64%	•
5	Antipolo City	1.61%	
6	General Trias City	1.36%	•
7	Santa Rosa City	1.25%	
8	Baguio City	1.14%	
9	San Fernando	1.13%	_

Mindanao

10 Calamba City

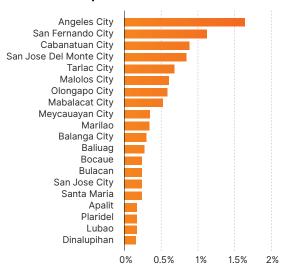
12.51%

•	2.51/0	% of Total L	eads
1	Davao City	3.00%	-
2	Cagayan De Oro	1.73%	-
3	Gen. Santos City	1.18%	-
4	Zamboanga City	0.70%	-
5	Tagum City	0.47%	-
6	lligan City	0.46%	-
7	Butuan City	0.43%	-
8	Koronadal City	0.35%	
9	Pagadian City	0.30%	
10	Cotabato City	0.29%	_

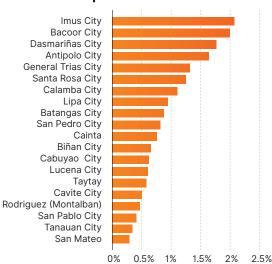




Top 20 Locations - Central Luzon

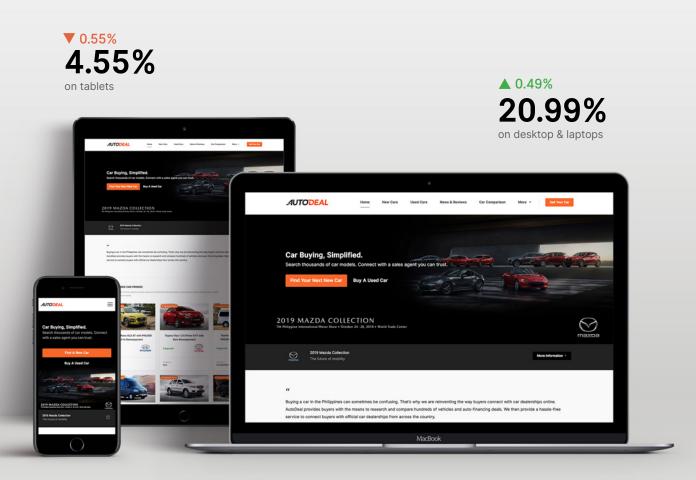


Top 20 Locations - Calabarzon



LEADS BY DEVICE

Philippine car-buyers become even more accustomed to shop for vehicles on their smartphones

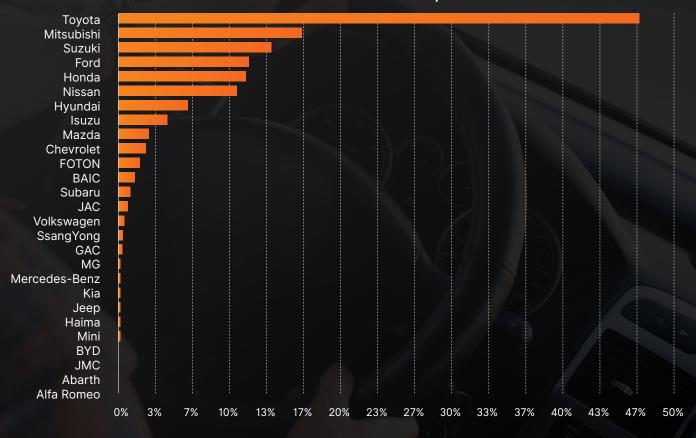


▲ 0.05% **74.45%**on mobile devices

MOST INQUIRED FOR BRANDS

Which brands were online consumers drawn to in Q1 2019?

% of Total AutoDeal Inquiries (Q1 2019)



























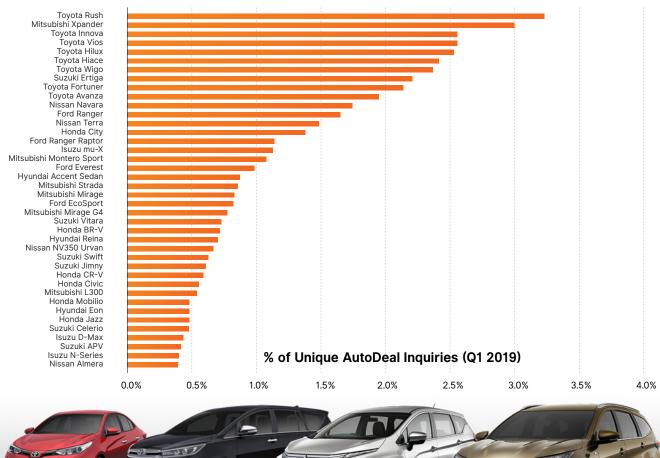




Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.com.ph.

AUTODEAL

TOP 40 Most inquired for nameplates in Q1 nameplates in Q1 2019



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

MANAGE ALL YOUR LEADS WITH AUTODEAL ENTERPRISE

Digital Lead Integration

Manage your website and social media leads through your AutoDeal Lead Management System. Track lead progress and sales conversion by your different digital lead services.

Event Registration & Event Analytics

Use AutoDeal's Enterprise technology for event registration and tracking of customers who attend your real-world marketing exhibits and mall displays. Use our analytics feature to discover which events generate the most ROI.

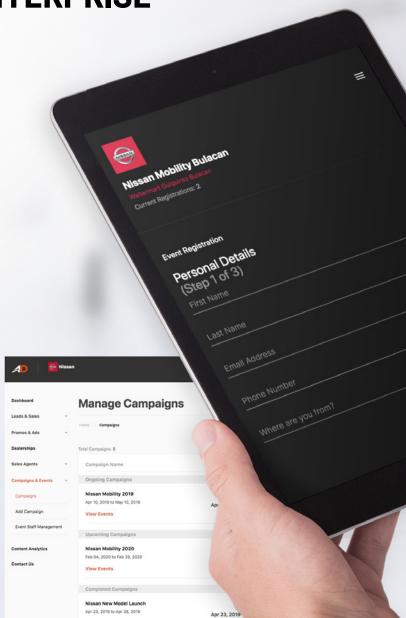
Contact Center

Keep in contact and up-sell to your prospective buyers using AutoDeal's cost-effect contact center solution. Use our proven model to help push more buyers into your pipeline while at the same providing vital statistics on customer satisfaction.



ANNIE SANTOS

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Q1 TOP SELLING NEW VEHICLES

Top Selling Nameplates on the AutoDeal Platform for Q1 2019









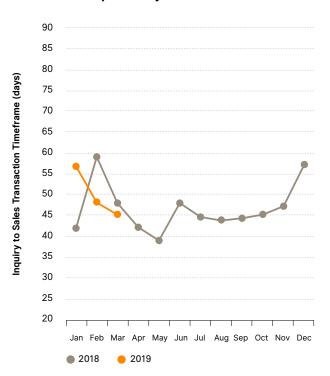


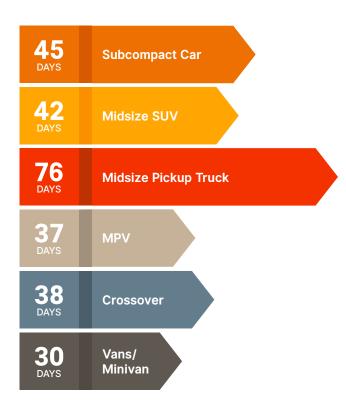


NEW CAR CONVERSION TIMELINE

AutoDeal customers, on average, take 50 days to purchase after their initial inquiry

Mean Average Lead-to-Sale Conversion for Sales Reported by AutoDeal Partner Dealers





Data for these charts and illustrations are derived from transaction data generated on the AutoDeal platform which compares a customer's original inquiry date with the date in which a sale is declared completed. The first chart showcases the change in average (mean) transaction time for AutoDeal buyers while the diagram to the right shows the average lead to sale conversion timeline for some of our most popular market segments. From this data, a trend of faster transaction times is occurring, with the majority of online consumers now taking 50 days to complete a purchase after their initial inquiry.

^{*}Based on 3,167 sales tracked in AutoDeal's Lead Management System from January 1 to March 31, 2019.

NEW CAR SALES BY SEGMENT

Transaction proportions of vehicles sold on AutoDeal.com.ph

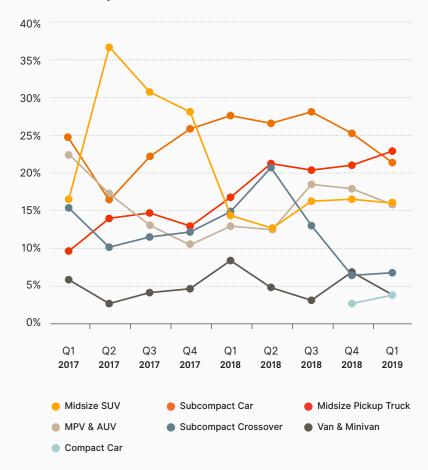
Are consumers looking for more car for their cash?

The trends of what consumers are purchasing on AutoDeal have continued to change since the introduction of increased excise tax at the beginning of 2018. Some of the most notable changes in recent months, continue to be the increased traction for midsize (or lifestyle) pickups like the **Nissan Navara** and **Ford Ranger** which continue to be a stern favorite among the digital car buying populace*. So much so, in fact, that the volume of purchases for light pickups actually surpassed the number of confirmed transactions made for subcompact cars on the AutoDeal platform in Q1 2019. With fresh entries to this segment, like the **Kia Soluto, Hyundai Reina** and **Suzuki Dzire**, it will be interesting to see how the tables could possibly turn as a result of much broader purchase options in due course.



The popular midsize SUV segment now seems to have stabilized itself following the 2017 season of panic buying. However, nothing can be more alarming than the considerable drop in transactions for subcompact crossovers which really took a nosedive by the middle of 2018, especially after the introduction of vehicles like the Toyota Rush and Mitsubishi Xpander, which now offer consumers a 7-seat option at a similar price. Is this the beginning of a major consumer shift or will new the abundance of new entries to this segment help to push stronger results in the months to come?

% Proportion of AutoDeal Generated Sales Tracked

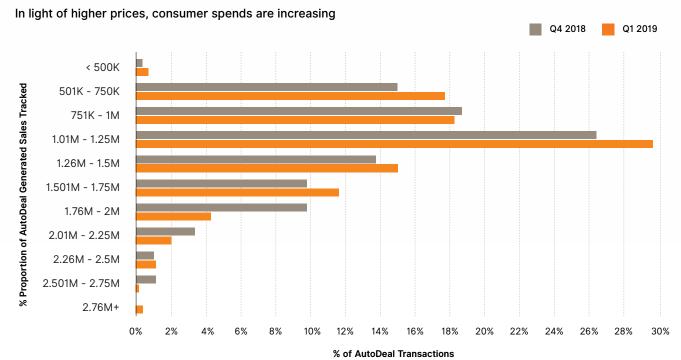


Note: This graph shows the breakdown of sales transactions recorded through the AutoDeal platform from 2017 to Q1 2019.

^{*}Confirmed transactions account for confirmed purchases remitted by dealers or customers through the AutoDeal platform.



NEW CAR SALES BY SRP





Average Price of Vehicle Sold on AutoDeal (2016-2019)



P1,259,545

Average price of vehicle sold on AutoDeal during Q1 2019

Data Source: Based on confirmed sales generated on AutoDeal.com.ph.

DEALS ON 2 WHEELS

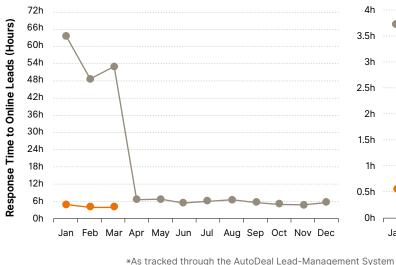


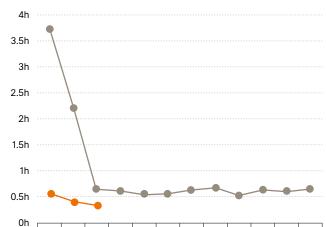


INDUSTRY RESPONSE TIME

AutoDeal continues to pioneer online customer service standards



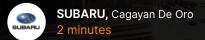


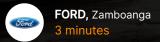


Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

TOP 10

Fastest Responding Dealers (Q1 2019)







CHEVROLET, Isabela 5 minutes



MAZDA, Greenhills 6 minutes



FORD, Balintawak 8 minutes



SUBARU, Cebu 12 minutes



2018

FORD, General Santos 13 minutes



FORD, Cagayan De Oro 13 minutes



SUZUKI, Commonwealth 15 minutes



CHEVROLET, Quezon Avenue
15 minutes

TOP DEALERS

In terms of Lead-to-Sales Conversion

NISSAN	NISSAN Bohol	12.50%
00	BAIC	11.11%

	NISSAN	11.11%
NISSAN	CamSur	

Tacloban

BAIC





January 2019

CHEVROLET	CHEVROLET Ilocos Norte	25.00%
Ford	FORD Zamboanga	20.00%
CHEVROLET	CHEVROLET Dagupan	18.18%
	MAZDA	14.29%

lloilo

FORD

Subic

	CHEVROLET	Dagupan	
18.18%	Ford	FORD Palawan	20.00%
14.29%	CHEVROLET	CHEVROLET Isabela	20.00%
8.57%	Timel	FORD	14.29%

Tarlac

November 2018

Θ	MAZDA	25.00%
nazoa	Cabanatuan	

	NISSAN	20.00%
NISSAN	Bohol	

	SUBARU	16.67%
SUBABLI	lloilo	

R	MAZDA	15.97%
	Dagupan	

	CHEVROLET	14.29%
CHEVROLET	CamSur	

February 2019

25.00%

23.09%

CHEVROLET

CHEVROLET

NISSAN	NISSAN Bataan
NISSAN	NISSAN Ilocos Norte
CHEVROLET	CHEVROLET Imus
	SUBARU

NISSAN	NISSAN CamSur	32.00%
CHEVROLET	CHEVROLET Cagayan De Oro	26.67%
CHEVROLET	CHEVROLET Shaw	20.00%
Ford	FORD Zamboanga	18.18%
	FORD	14.29%

December 2018

March 2019

Subic

NISSAN	NISSAN Bataan	11.76%
NISSAN	NISSAN Ilocos Norte	10.00%
CHEVROLET	CHEVROLET Imus	8.33%
SUBARU	SUBARU Cagayan De Oro	8.33%
CHEVROLET	CHEVROLET Commonwealth	6.67%

Note: Sales conversion is recorded and presented as it stands on April 1, 2019. Conversion is based on the date in which the lead was generated.

Zamboanga

TOP SALES AGENTS

AutoDeal Agents with the best Lead-to-Sale conversion

	October 2018	
Mazoa	Alma Baniqued Dagupan	67%
Ford	Don Sison Subic	40%
₩ MBZDB	Regina De Ramos Cavite	25%
*	June Agravante Pili	25%
CHEVROLET	Jorge Narte	17%
	January 2019	
Ford	Glenn Ecleo Subic	33%
NISSAN	Annabelle Ortega Isabela	30%
CHEVROLET	John Michael Ferrer Dagupan	18%
Ford	Kathrina Torres Malolos	15%
NISSON	Shad Rebuta	12%

Matina

November 2018			
Malzosi	Regina De Ramos Cavite	26%	
Ford	Kathrina Torres Malolos	20%	
Mazoa	Harold Pedernales North EDSA	17%	
Fired	Rodolfo Bulan Zamboanga	14%	
CHEVROLET	John Michael Ferrer Dagupan	11%	
	February 2019		
Messor	February 2019 Karla Pasion Tarlac	67%	
FINESZOE	Karla Pasion	67% 50%	
	Karla Pasion Tarlac Russell Padilla	50%	
MEZOS MEZOS	Karla Pasion Tarlac Russell Padilla Dagupan Swanson Quimbo Jr.	50%	

- [December 2018	
	Regina De Ramos Cavite	31%
(I)	Meg Agustin Marikina	29%
Ford)	Mai Valencia Alabang	27%
HEVROLET	Rutchell Sumaylo Cagayan De Oro	20%
*	Allen Tanteo Las Piñas	22%
	March 2019	
NISSAN	Roval Buñag CamSur	20%
SUBARU	Kevin Villegas Pasig	14%
•	JB Gonzales	13%

Malolos

Lipa

Decerie Robredo

Karen Cancio

Global City

11%

11%







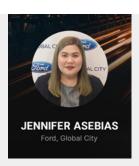
FORD GLOBAL CITY Dealer of the Year Award

Ford Global City, under the Autohub Group of Companies, has stood out for its stellar performance on their digital customer service with its agents maintaining a 90-minute reply speed average and closing online sales with a total of 147 cars sold through the platform. Beating over 300+ Partner Dealers, Ford Global City received the prestigious AutoDeal trophy and a dealership celebration.

MAZDA PHILIPPINES

Online Customer Service Award

The jewel in the AutoDeal Awards crown this year fell to Mazda Philippines, which outshined all brands in terms of dealership response time and sales conversion on the AutoDeal platform for the duration of 2018. Mazda's commitment to providing the very best in online customer service was recognized during their recent Dealer Awards, where Mazda CEO Steven Tan was presented the coveted AutoDeal Online Customer Service Award trophy.



FORD GLOBAL CITY Agent of the Year

Beating over 2,000 sales agents from more than 300 partner dealers across the Philippines, Jennifer Asebias from Ford Global City of the AutoHub Group is the overall winner of the 2018 AutoDeal Sales Agent of the Year Award. Good customer service, Commendable 6.11% lead-to-sale conversion rate, a perfect five-star review, and a 15-minute average reply speed were her winning factors. She received AutoDeal trophy and 4D3N Trip to Taiwan for two.

FIVE STARS

Here are some of our favorite buyer reviews of Q1 2019



JORGE NARTE
Chevrolet, Iloilo



Consistency at its best! One of the most sincere Sales Agent there is. I appreciate the effort and patience of Jorge Narte (Chevrolet Iloilo) for guiding me through the end of the deal until my chevy was released. Therefore, I would highly recommend Jorge to my family and friends to purchase a chevy vehicle. 2 Thumbs up!

Arvin Marc Orap-Orap purchased a Chevrolet Sail 1.5 LT



RICHELLE BARTE Hyundai, Las Piñas ★ ★ ★ ★



Very nice human being, so accommodating and friendly, I highly recommend her services because everything about her is always on point. She attended to us non stop until we left with the unit. Big thank you po! Very sweet to my daughter just so you know my daughter kept asking about you since we left last night. Thanks again and God bless.





EM GUAB Honda Cars, Kalookan ★ ★ ★ ★ ★



Miss Em was very friendly, professional and patient. She took care of all my needs during our transaction. She was very patient even I had delays purchasing my vehicle. Even we only met personally on the day itself when I was about to take out the car, she was very hands-on updating me with the status and providing me with all necessary details for my vehicle purchase. I highly recommend Miss Em. Thank you very much and keep up the great work. Honda Cars Kalookan Inc. must be very proud of you, you are such an asset to your company. Good luck on your future sales:)

Chester Ramilio purchased a Honda BR-V 1.5 S CVT



JAMES SY Toyota Quezon Ave.



Big thanks to Mr. James Sy, I really appreciated and happy to this guys how he handles the client. Especially with me, he did an excellent job. He managed well all throughout. I will recommend him to my relatives and friend to transact with us related to the car loan. Once again thank you so much Mr. Sy great job and commitment to all of your client. God bless and more client to come.

Erdwin Quierrez

purchased a Toyota Innova 2.0 J Gas MT







Very professional and accommodating agent. Quick to respond in my inquiries, understands her client's needs and gives advice on how you can get the best value for your money. She was willing to go the extra mile to make the transaction fast and was able to release the car in just 1 week (from the time I posted in AutoDeal). It has been a very pleasant buying experience that she was able to close the deal via calls and SMS only; I just met her in person on the day of the car release. Kudos to Kate for a job well done! I will definitely recommend you to all of my colleagues:)

Allan Danos

purchased a Honda BR-V 1.5 V Navi CVT

FIND YOUR AUTODEAL CUSTOMER REVIEWS

- 1. Log in to your AutoDeal Dashboard.
- 2. Click on the Sales Agents tab in the left sidebar menu.
- 3. Click on Reviews

Dealers on our Pro & Elite Subscriptions may Publish customer testimonials to AutoDeal. These will appear in your Promo Pages and on your Dealership Profile Page. Highlighting these positive customer experiences will enable you to attract more buyers.



Mark as sold in the AutoDeal for agents app.

Customers will receive the opportunity to rate sales agents every time a sale is confirmed using the mark as sold function in the AutoDeal For Agents mobile application or in our web-based dealer or agent dashboards.



MORE LEADS ARE UP FOR GRABS

Put your brand or dealership in the spotlight with AutoDeal's new advertising offerings.

- FEATURED DEALER REVIEWS Share your customergenerated reviews in areas of high exposure throughout the AutoDeal website to showcase your commitment to customer service and to entice buyers to transact with your dealership.
- DEALER MEDIA Low cost and highly effective digital display, eDMS, content, and video offerings designed and costed specifically for dealers.
- MORE HEROES Our new hero offerings provide brands with the ability to generate a high degree of exposure to consumers shopping in particular vehicle segments.

Partner with us.



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ROMMEL LIMHead of Dealer Accounts

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INDUSTRY RESPONSE TIME

AutoDeal continues to pioneer online customer service standards in the used car industry.



Fastest Responding Dealers (Q1 2019)

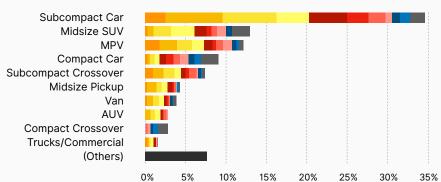
	Dealer	Response Time
1	Jay Angeles	9 minutes
2	RL Cars	18 minutes
3	Central Auto Exchange	37 minutes
4	Toyota Certified Pre-Owned, Balintawak	57 minutes
5	SamCars Trading	116 minutes
6	Automoton	122 minutes
7	Park n Sell B - Harold	263 minutes
8	PMB Cars	269 minutes
9	Ascentcars Auto Center	269 minutes
10	Siena Motors	331 minutes

USED CARS IN DEMAND

What kind of vehicles are used car buyers looking for?

Note: As tracked through the AutoDeal Lead Management System



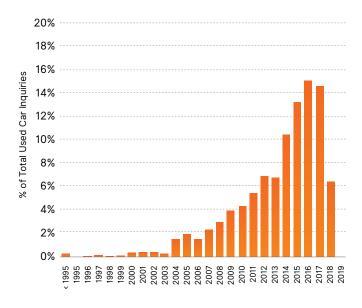




Most Inquired for Used Car Brands

Toyota Mitsubishi Ford Honda Hyundai Nissan Suzuki Mazda Chevrolet Kia Isuzu **BMW** Mercedes Volvo Peugeot Mini Audi Chrysler Porsche 0% 4% 8% 12% 16% 20% 24% 28% % of Total AutoDeal Used Car Inquiries (Q1 2019)

Most Inquired for Model Years



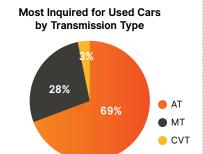
USED CARS IN DEMAND

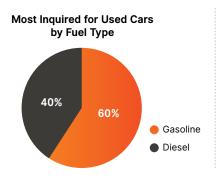
Note: As tracked through the AutoDeal Lead-Management System

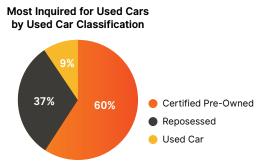
What kind of vehicles are used car buyers looking for?

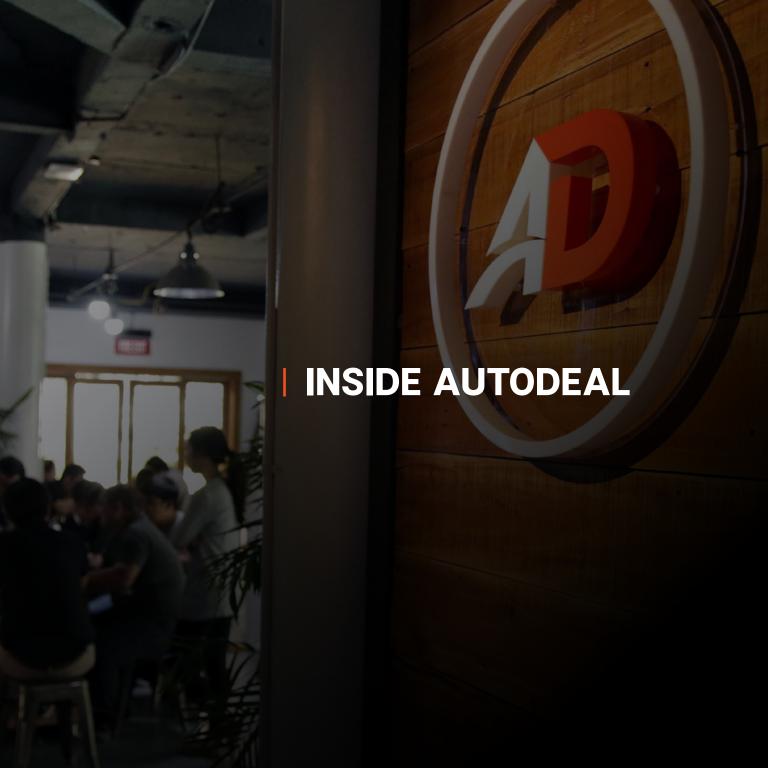












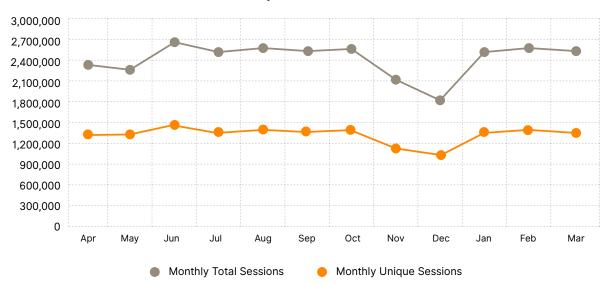


AUTODEAL PROFILE

We are the no.1 automotive marketplace in the Philippines

	Total Visits	Unique Visits	Pageviews	Bounce Rate	Pages Per Session	
JANUARY	2,359,895	1,250,681	8,116,440	14.59%	3.44	
FEBRUARY	2,213,676	1,186,317	7,537,307	16.88%	3.4	
MARCH	2,295,480	1,243,345	7,810,671	13.97%	3.4	
TOTAL	6,869,051	3,680,343	23,464,418	15%	3.42	

AutoDeal.com.ph Web Traffic (2018-2019)



We're multi-platform



541KFacebook Likes



8.5KInstagram Followers



3.13K
Twitter Followers

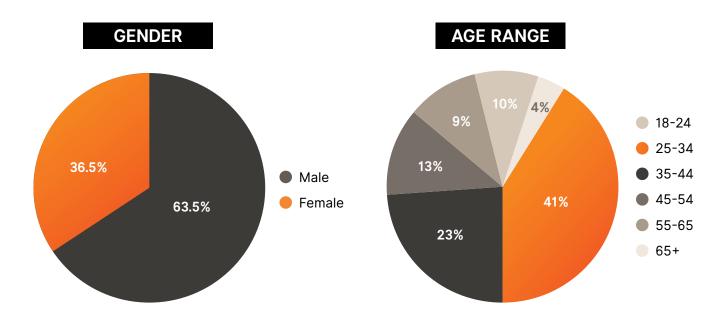


72KYouTube Subscribers



174K

E-mail Subscribers





Note: Click the images to read reviews.



2018 NISSAN TERRA

Published January 23, 2019

19,020 Views

Social Shares



4:26 Average Read Time



2019 FORD RANGER WILDTRAK BITURBO

Published February 22, 2019

10,521 Views

1,000 Social Shares

4:23

Average Read Time

2019 HYUNDAI REINA

Published March 13, 2019



9,839 Views

507 Social Shares

3:57 Average Read Time



2019 BAIC M60 LUXURY

Published January 10, 2019



7,596 Views

566 Social Shares

4:23 Average Read Time



2019 SSANGYONG TIVOLI **PREMIUM SPORT**

SSANGYONG

Published January 11, 2019

7,340 Views

382 Social Shares

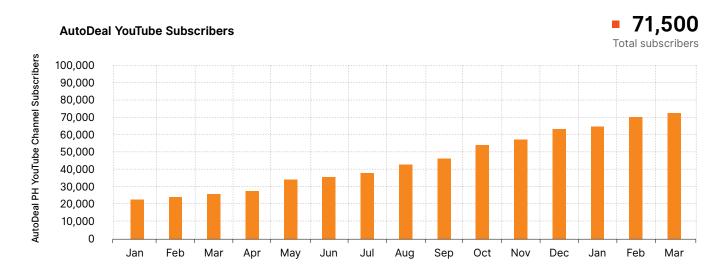
3:35 Average Read Time

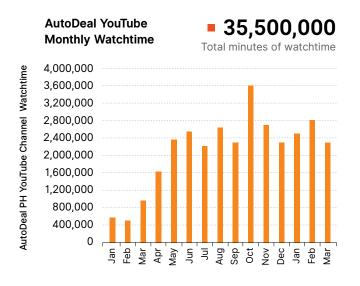


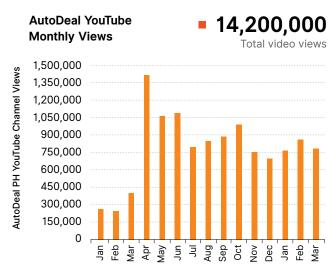
AUTODEAL VIDEO

Now the no.1 automotive YouTube channel in the Philippines

Note: Data as of March 31, 2019







TOP 5

Most Viewed Videos of Q1 2019

Note: Click the images to view videos.

2019 NISSAN TERRA VL

Behind The Wheel | Published February 9, 2019

137,823 Views

1,900 Likes

446 Comments



2019 TOYOTA HIACE

Launch | Published February 19, 2019



2019 SUZUKI ERTIGA

Media Drive | Published February 27, 2019



106,340 Views

567 Likes

139 Comments



27,700 Views

306 Likes

75 Comments



BAIC BJ20 1.5 LUXURY CVT



Unboxing | Published January 10, 2019



127 Likes

62 Comments



MCDONALD'S BREAKFAST FRENZY IN THE CHEVROLET COLORADO

CHEVROLET

Published February 15, 2019



393 Likes

55

Comments



Note: Data is reflected from AutoDeal YouTube channel as of March 31, 2019.





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

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