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Inside The AutoDeal Group

Everything you need to know about 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 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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New Normal?

It's a difficult time.

In recent weeks there's been a deluge of articles reflecting on the weakened state of the Philippine automotive industry as sales figures fall approximately fifty percent short year-on-year.

The slowdown is hardly unexpected. While there are indications of rallying consumer interest, the previously experienced pause in daily operations that occurred during enhanced community quarantine is not something that local automotive businesses - or any other business for that matter are accustomed too.

Whether it be the T.R.A.I.N. induced sales reductions of 2018 or the 2008 global financial crisis, previous incumbencies were merely slowdowns, whereas the impact of COVID-19 brought things screaming to an abrupt halt with very little notice.

While the onset of the current crisis may have differed from those in the past, the route to recovery should look familiar. As sales pipelines grow, brands and dealers need to start evaluating the x's and the y's to optimize their recovery speed. This may, for the first time in their history, push different automotive groups to evaluate factors of their operations that they have never given much time to in the past.

That's the thing about being in the weeds. When everything is running smoothly, we tend to overlook micro-level factors that are contributing to our success. We feel like we're running well, but under the surface, we're not as optimized as we should be. When we run into trouble, it's only then that we begin to start picking fault with the way that we do things.

Thankfully, throughout this process, we find new opportunities at the same time, opportunities that may have been overlooked in the past.

This brings me to the notion of the 'new normal', a term which is widely being coined to described social distancing within showrooms and contactless car-buying. If these items are now necessities to the survival of the current pandemic, shouldn't the optimization of data now be part of our new normal? Should this not be the compass to not only guide us through today's hardship but to also navigate us through the challenges of the future?

Welcome back to AutoDeal's Industry Insights Report; in this, our first report for 2020 we provide all of our routine data on new and used carbuying trends, we go in-depth to see how COVID-19 is changing the playing field and for the first time release data for the motorcycle industry courtesy of MotoDeal.com.ph.

To my friends in the industry both at home and abroad, stay safe and well.

Christopher L. Franks AutoDeal Chief Operating Officer

H1 2020 **SUMMARY**

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











14,252,589 **WEBSITE VISITS**

By Car Buyers, Vehicle Owners, and Enthusiasts

130,380 **QUOTES & TEST DRIVES**

Serviced to dealers from buyers inquiring on AutoDeal & MotoDeal

11,441 **CONFIRMED PURCHASES**

Tracked and confirmed from users who submitted leads in H1 2020

86,383 **CONVERSATIONS**

Back and forth messages between prospective car buyers and dealers

QUICK FACTS

Key take home points from our H1 2020 Report



81.60%

Of <u>AutoDeal.com.ph</u> buyers shop for vehicles using their smartphone



63 Days

The Average time it takes an AutoDeal.com.ph buyer to purchase after their online inquiry



P1.30M

The Average price of vehicle sold on the AutoDeal.com.ph in 2019



30 minutes

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



Note: Data indicated is from analysis of visitors accessing AutoDeal.com.ph from January 1, 2020 to June 30, 2020

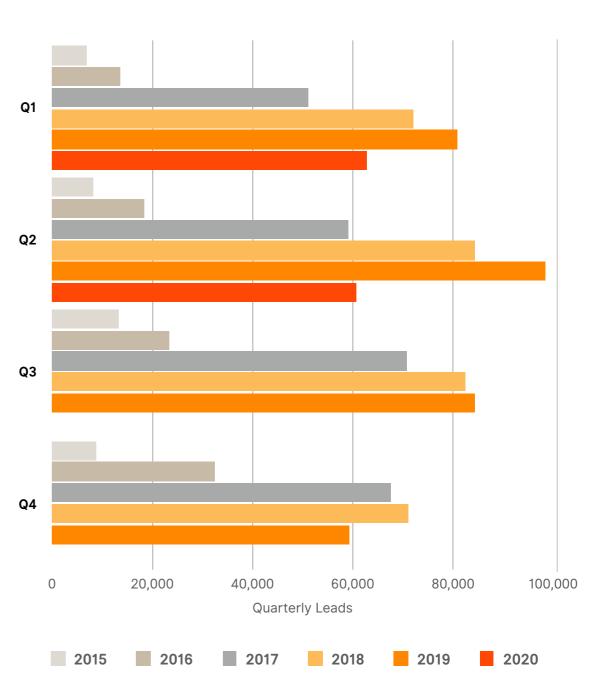


Quotes, Test-Drives & Inquiries



40,000 38,000 36,000 34,000 32,000 30,000 28,000 26,000 24,000 22,000 20,000 18,000 16,000 14,000 12,000 10,000 8,000 6,000 4,000 2,000 0 NOY 404 MIG Ser 2019 2020

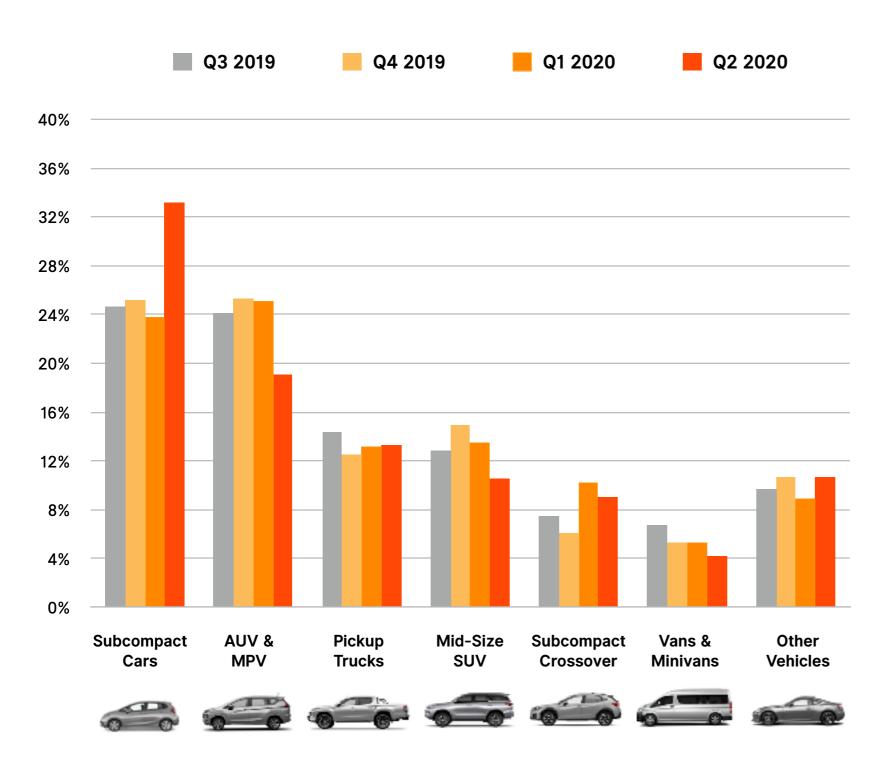
AutoDeal Leads (2015-2020)



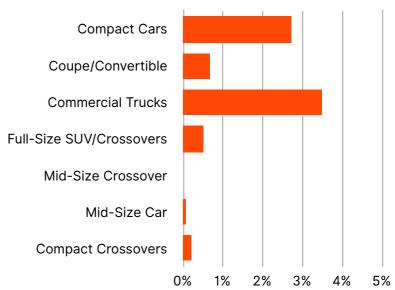
Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.com.ph.

Leads by Market Segment

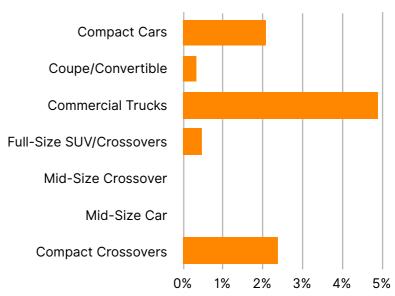
Based on AutoDeal inquiries for major vehicle categories



Other Vehicles (Q1 2020)

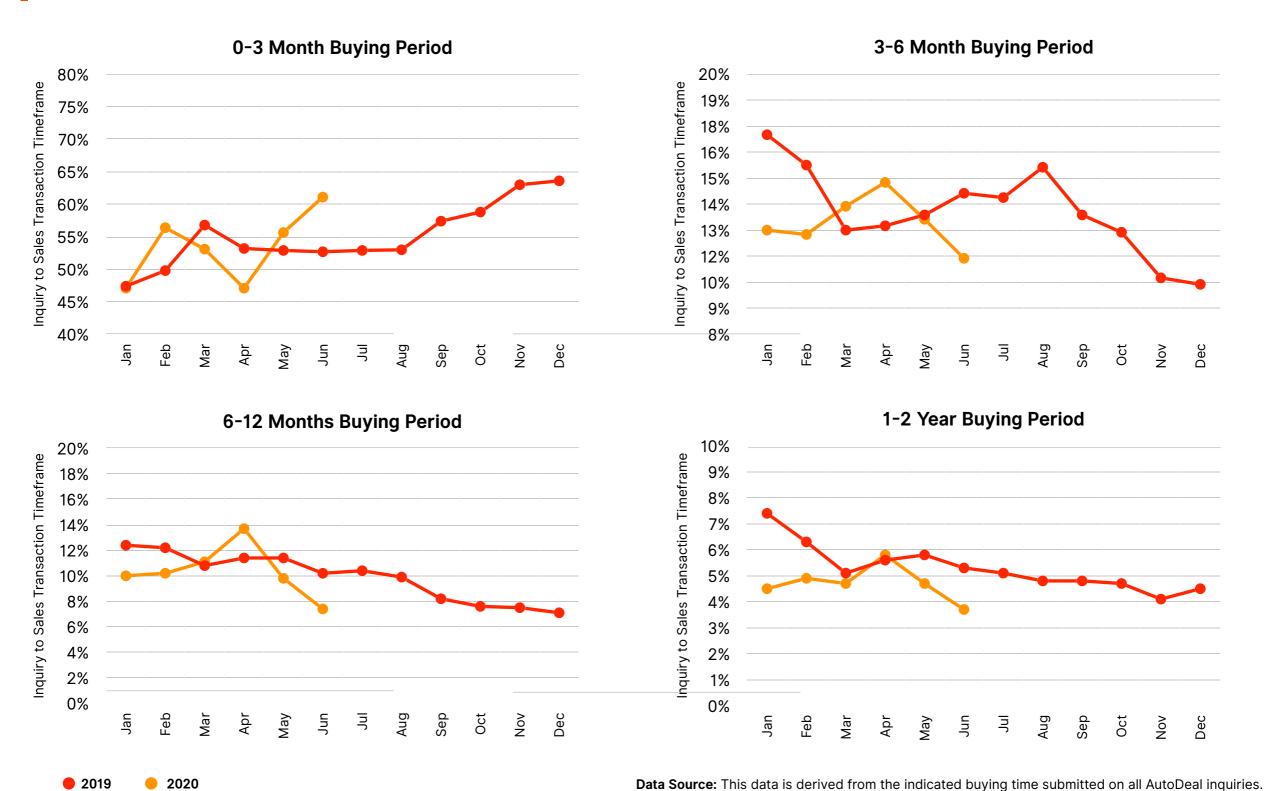


Other Vehicles (Q2 2020)



Inquiring & Buying Trends

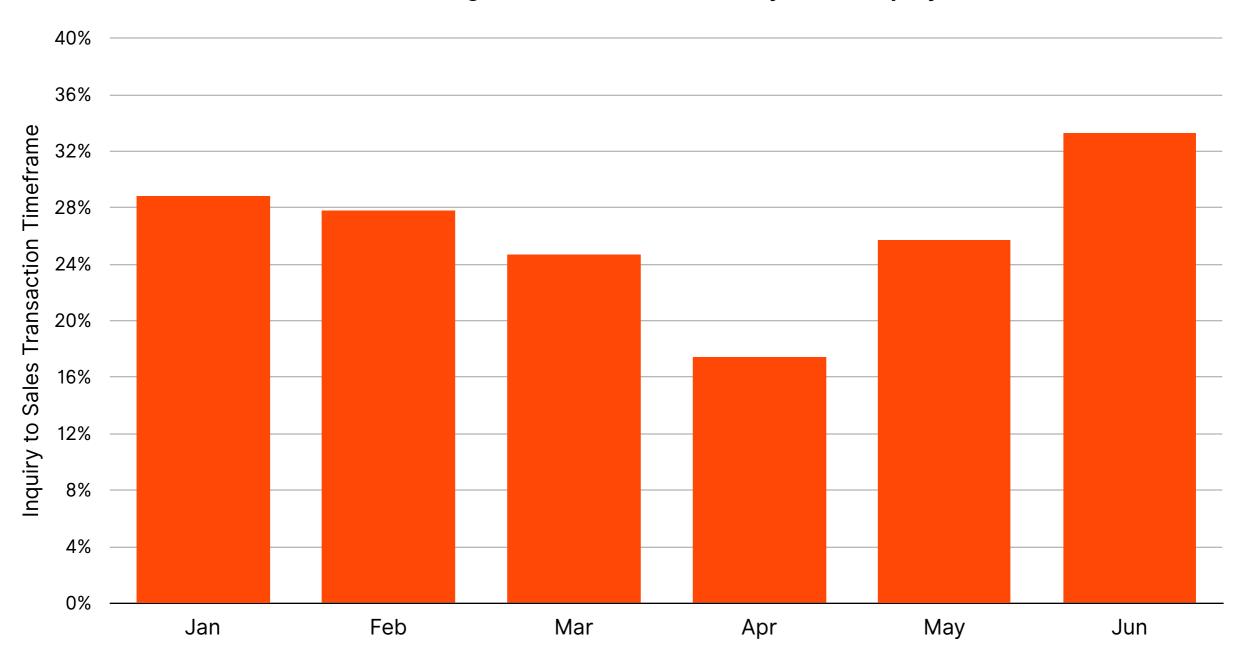
How soon are consumers looking to buy?



Inquiring & Buying Trends

How soon are consumers looking to buy?

Looking to Purchase within 30 Days from Inquiry



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

Leads by Location

AutoDeal accommodated inquiries from 1,079 towns or cities in H1 2020

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

Metro Manila

33.49%		% of Total Leads		
1	Quezon City	7.44%	-	
2	Manila	3.99%	-	
3	Makati City	3.28%	-	
4	Pasig City	2.71%	-	
5	Taguig City	2.39%		
6	Caloocan City	2.19%		
7	Paranaque City	2.04%	•	
8	Las Pinas City	1.85%	•	
9	Mandaluyong City	1.66%	-	
10	Muntinlupa City	1.55%		

Luzon

47.72%		% of Total Leads		
	1	Imus City	1.88%	A
	2	Bacoor City	1.75%	•
	3	Dasmariñas City	1.71%	-
	4	Antipolo City	1.49%	
	5	General Trias City	1.47%	•
	6	Angeles City	1.42%	-
	7	Calamba City	1.30%	-
	8	Santa Rosa City	1.17%	-
	9	San Fernando City	1.09%	
	10	Baguio City	1.09%	

Visayas

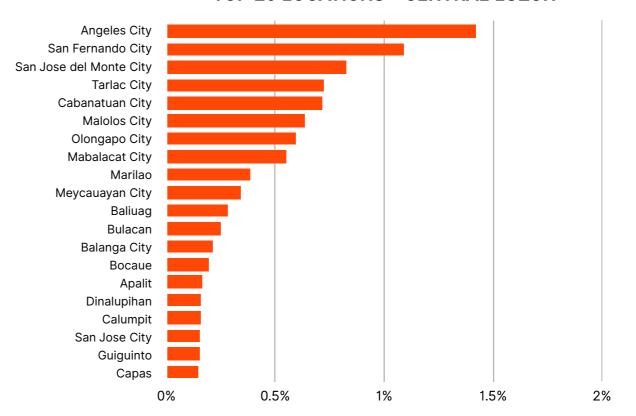
7.9	90%	% of Tota	l Leads
1	Cebu City	1.33%	-
2	Iloilo City	1.10%	-
3	Bacolod City	0.81%	-
4	Tacloban City	0.49%	-
5	Lapu-Lapu City	0.38%	-
6	Mandaue City	0.30%	-
7	Dumaguete City	0.25%	A
8	Tagbilaran City	0.25%	•
9	Roxas City	0.18%	A
10	Talisay City	0.16%	

Mindanao

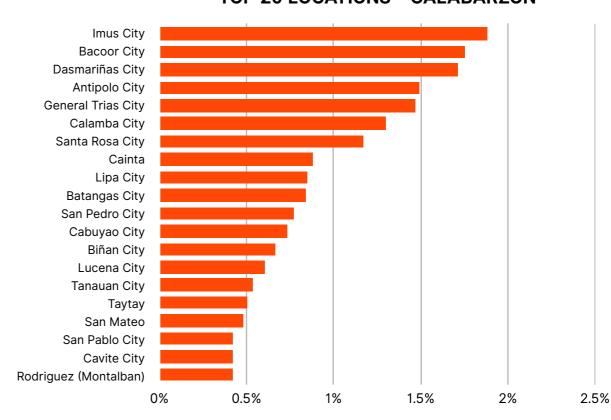
10.89%		% of Total Leads		
1	Davao City	2.36%	-	
2	Cagayan De Oro City	1.58%	-	
3	General Santos City	0.84%	-	
4	Zamboanga City	0.62%	-	
5	lligan City	0.45%	-	
6	Butuan City	0.43%	-	
7	Cotabato City	0.33%	-	
8	Tagum City	0.29%	-	
9	Koronadal City	0.28%		
10	Pagadian City	0.25%	\blacksquare	

LUZON In depth Lead Volumes **CAGAYAN** VALLEY ILOCOS 2.21% 3.66% CAR 1.46% CENTRAL LUZON 13.28% **CALABARZON METRO MANILA** 24.45% 33.49% BICOL 1.82% MIMAROPA 0.81% Data Source: Based on leads (quotes, inquiries, test-drives) generated on AutoDeal.com.ph.

TOP 20 LOCATIONS - CENTRAL LUZON

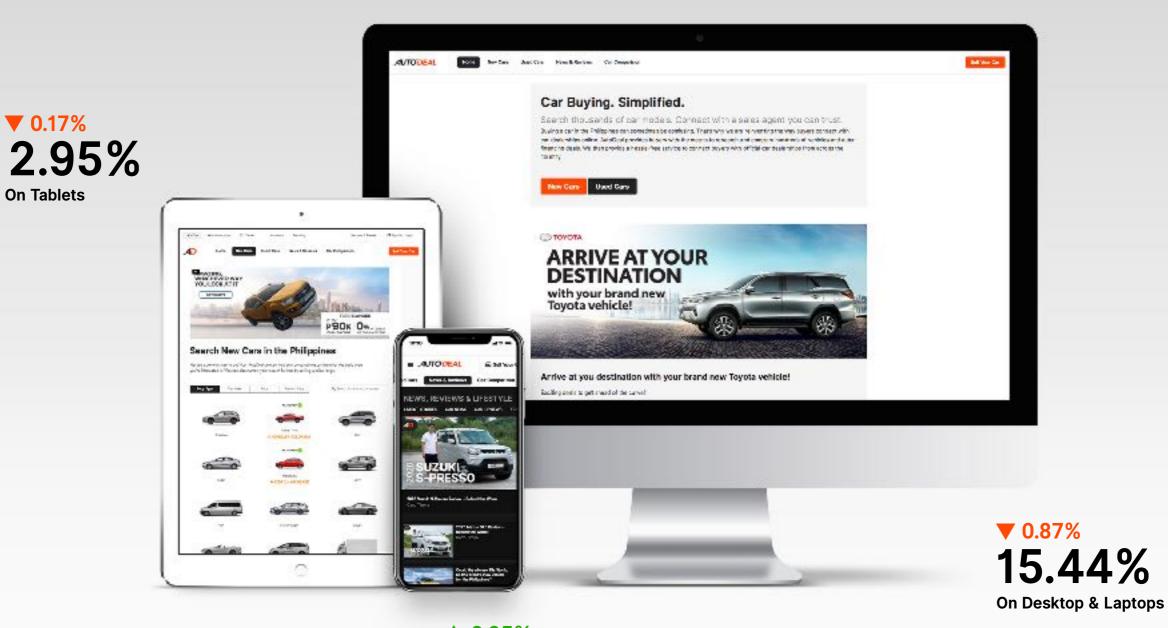


TOP 20 LOCATIONS - CALABARZON



H1 2020 Leads by Device

Inquiries made via mobile devices continue to rise



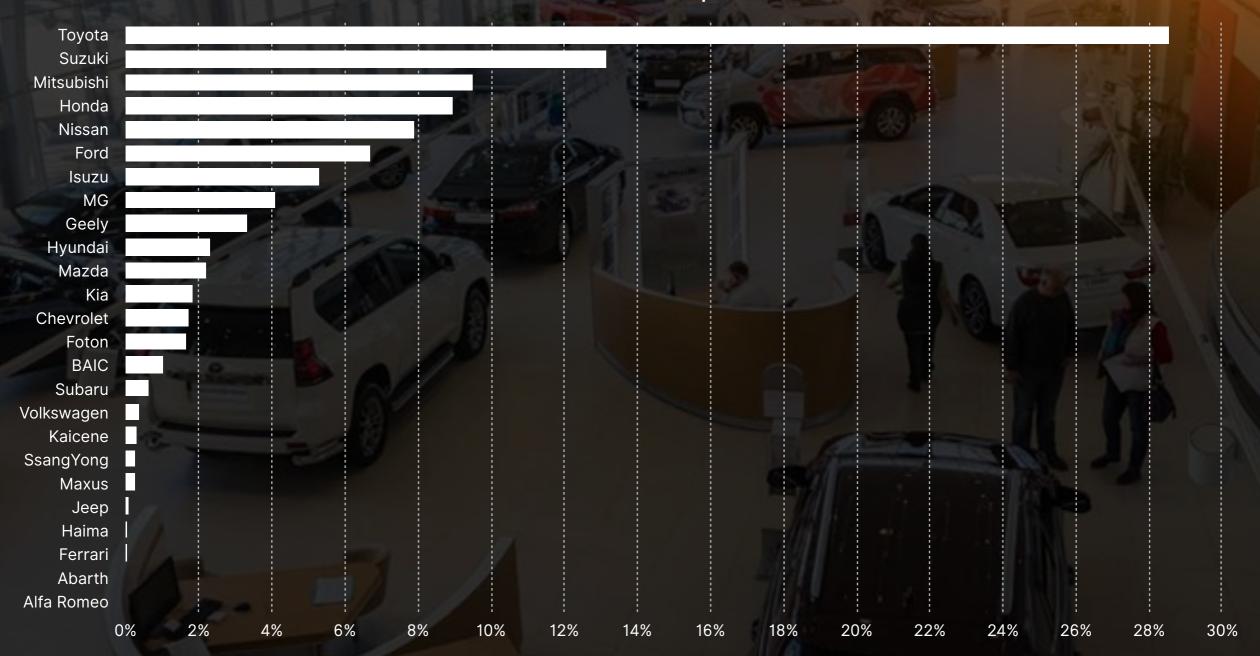
▲ 0.95% **81.60%**On Mobile Devices

Most Inquired for Brands

Which brands were online consumers drawn to in H1 2020?

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

% of Total AutoDeal Inquiries (Q1 2020)























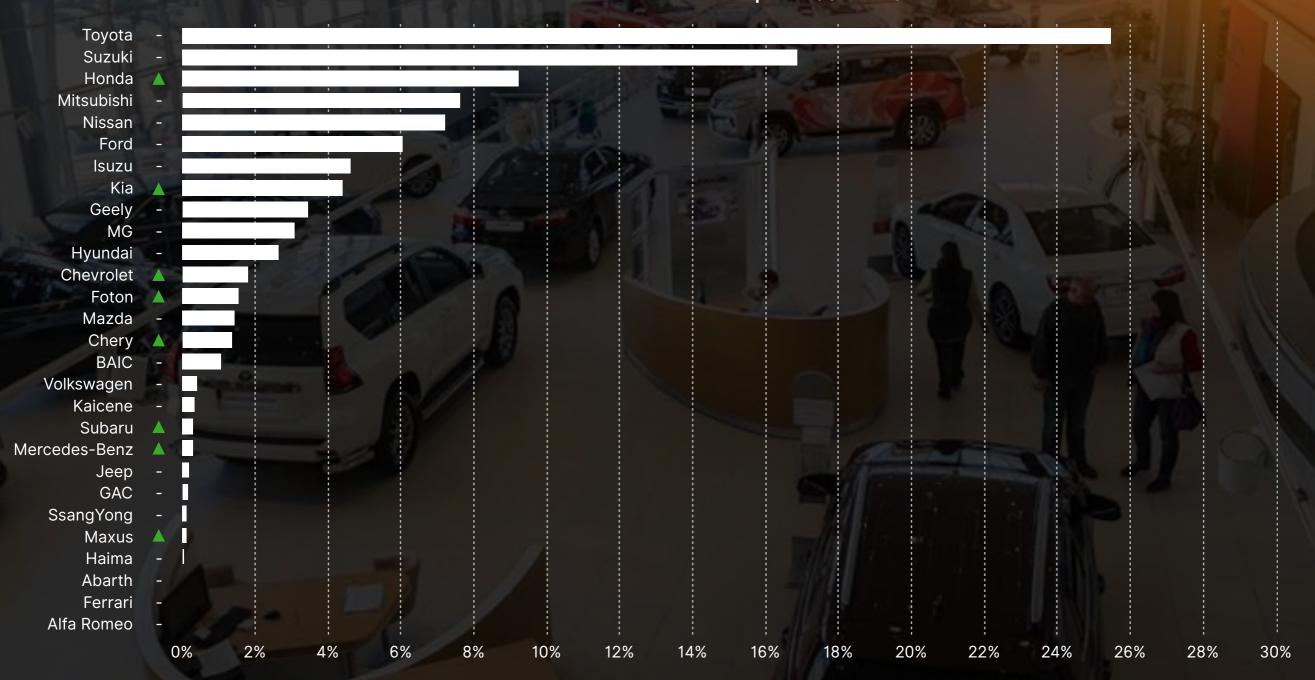


Most Inquired for Brands

Which brands were online consumers drawn to in H1 2020?

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

% of Total AutoDeal Inquiries (Q2 2020)



















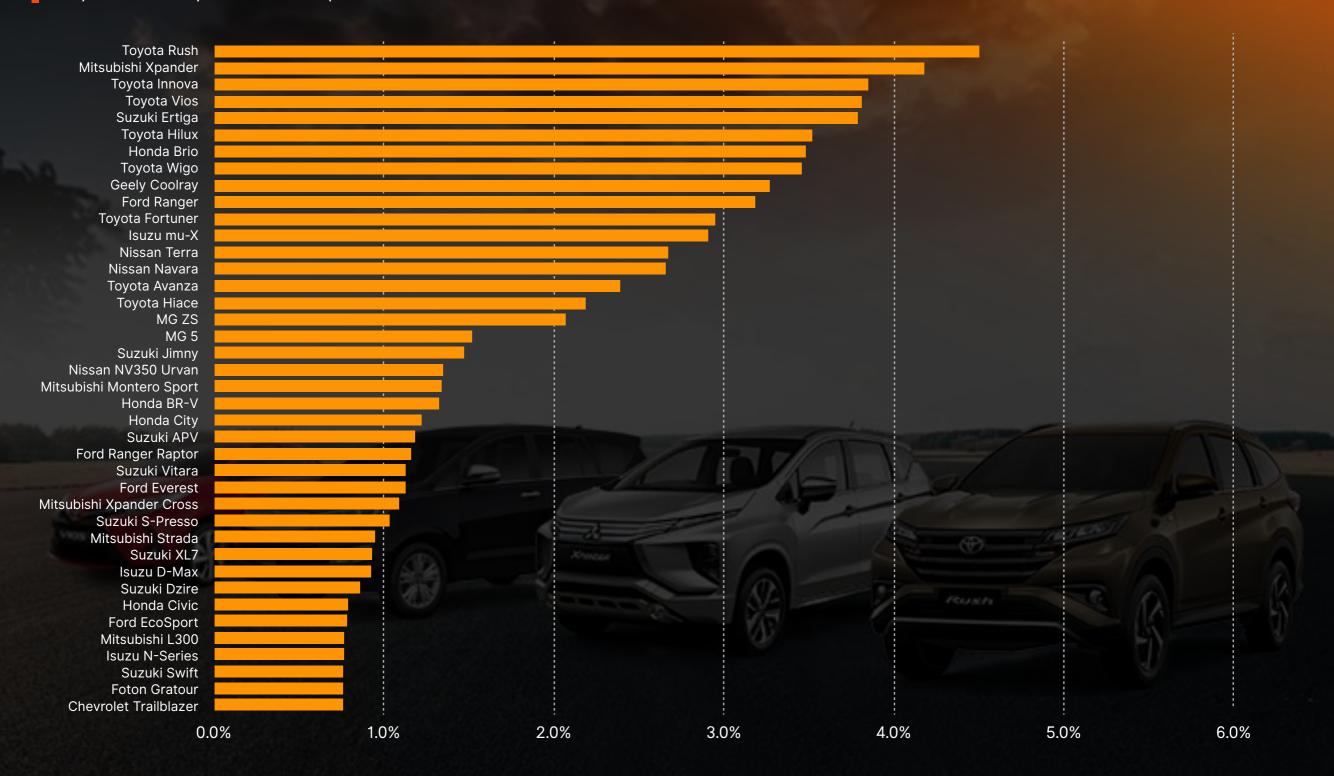




AutoDeal: Top 40

Top 40 most inquired for nameplates in Q1 2020

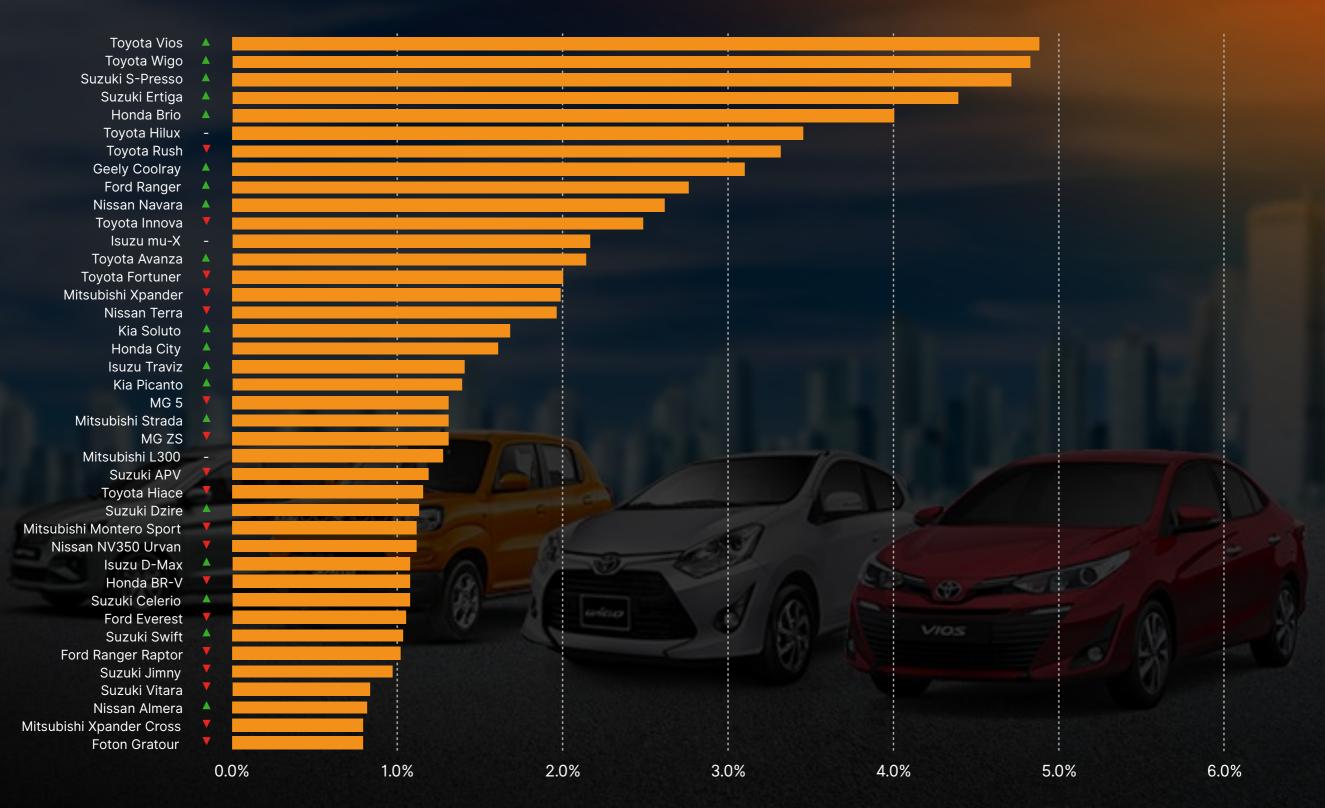
Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.com.ph.



AutoDeal: Top 40

Top 40 most inquired for nameplates in Q2 2020

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







Subcompact Car





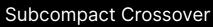




HONDA Brio



TOYOTA Wigo







FORD Ecosport



MG ZS



GEELY Coolray

Mid-Size SUV





NISSAN Terra



TOYOTA Fortuner



FORD Everest MPV





MITSUBISHI Xpander



TOYOTA Rush



TOYOTA Innova



Pickup Truck





FORD Ranger



NISSAN Navara



FORD Range Raptor

Compact Crossover





HONDA CR-V



MG RX5



MAZDA CX-5

Compact Car





MAZDA



HONDA Civic



TOYOTA Altis





NISSAN Urvan

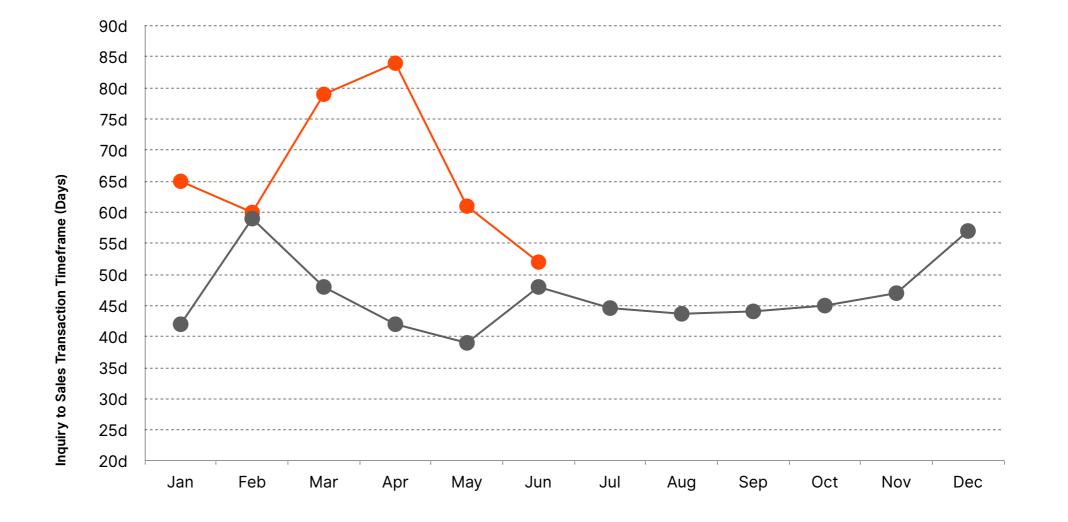


TOYOTA Hiace



FOTON Gratour

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



2019 🛑 202

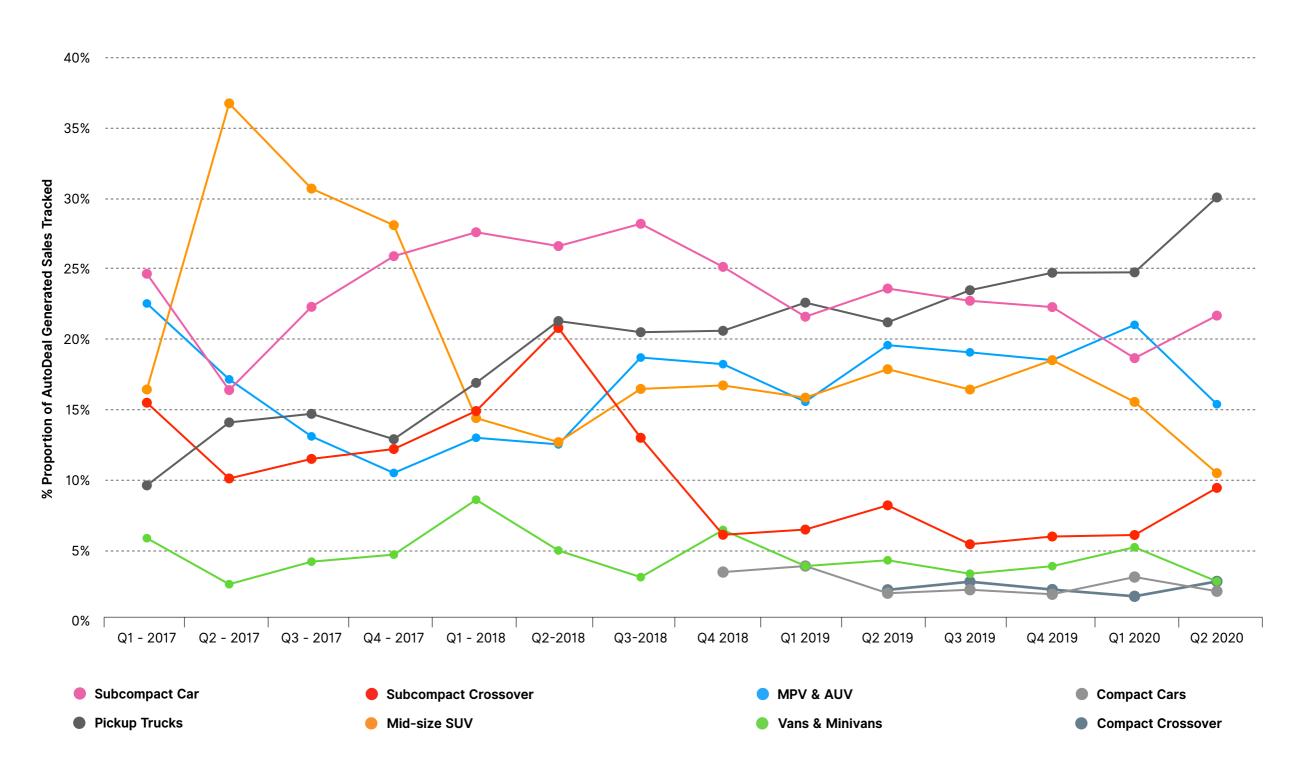
55 DAYS	Subcompact Car
86 DAYS	Midsize SUV
71 DAYS	Pickup Trucks
48 DAYS	MPV
57 DAYS	Subcompact Crossover
65 DAYS	Van/Minivan

These charts indicate the time that is taken for a customer to complete a final sales transaction after they submit and online inquiry via AutoDeal.com.ph. The chart to the left indicates the average (mean) time taken for customers to complete a transaction whereas the diagram to the right indicates the average lead to conversion, by popular market segment. From this data, we see clear indication that the majority of online consumers take **63 days to complete a purchase** after their initial inquiry.

^{*}Based on sales tracked in AutoDeal's Lead Management System from January 1, 2020 - June 30, 2020

New Car Sales by Segment

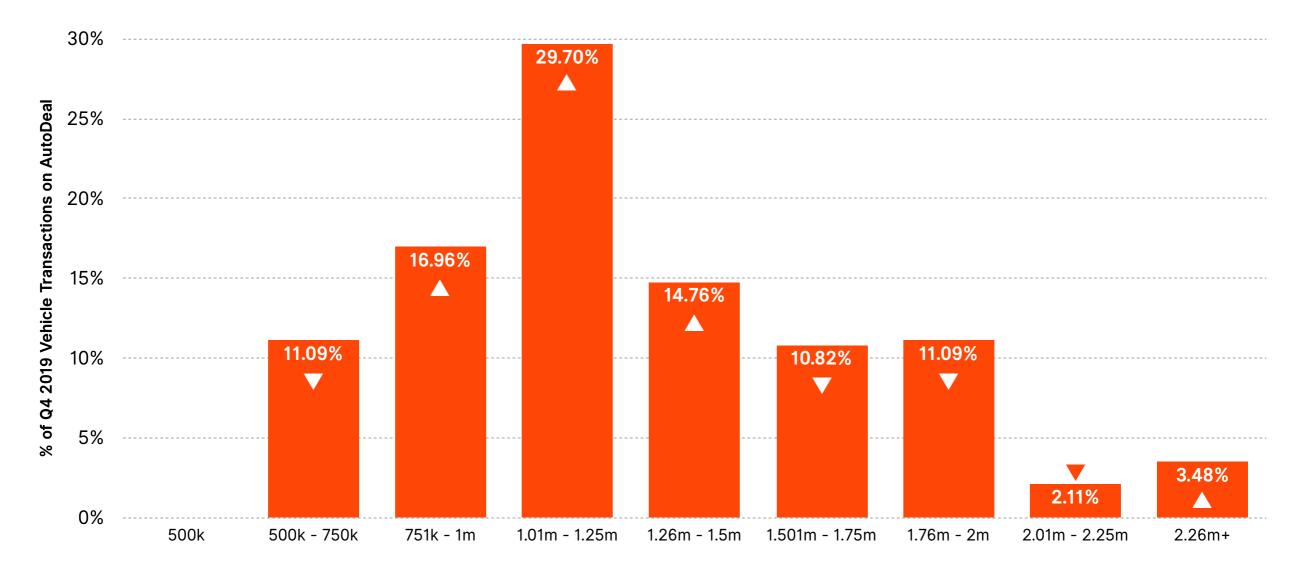
Transaction proportions of vehicles sold on AutoDeal.com.ph*



Note: This graph shows the breakdown of sales transactions recorded through the AutoDeal platform from 2017 to Q2 2020.

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

H1 2020 AutoDeal Vehicle Transactions by Price Range

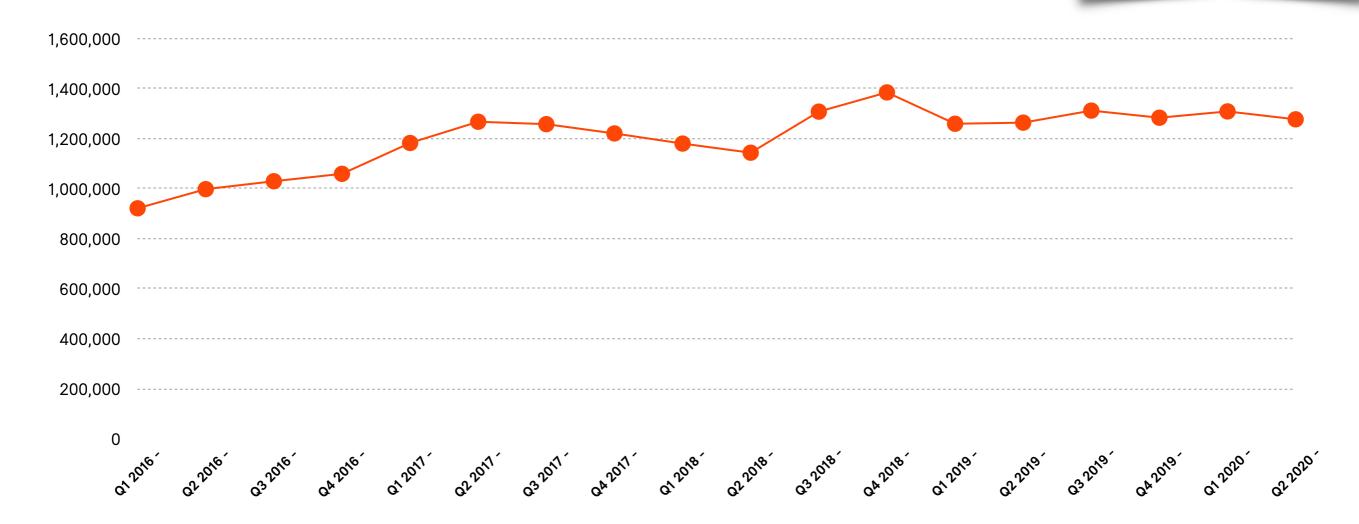


New Car Sales by SRP

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

Average Price of Vehicle Sold on AutoDeal (2016 -2020)

P1,300,599 was the average price sold in H1 2020







The automotive industry is no stranger to changing consumer trends. Over time, gradual shifts in technology improved buying power, or even highly effective marketing campaigns can be enough to help contribute to a slow-changing shift in car-buying

Product planners are tasked with the difficult job of anticipating trends, conducting research, and analyzing data to help ensure that the products being bought to market will meet consumer expectations. It's a proverbial game of chess that not only relies on a constant evaluation of your own products but a cross-comparison against competitors in the market.

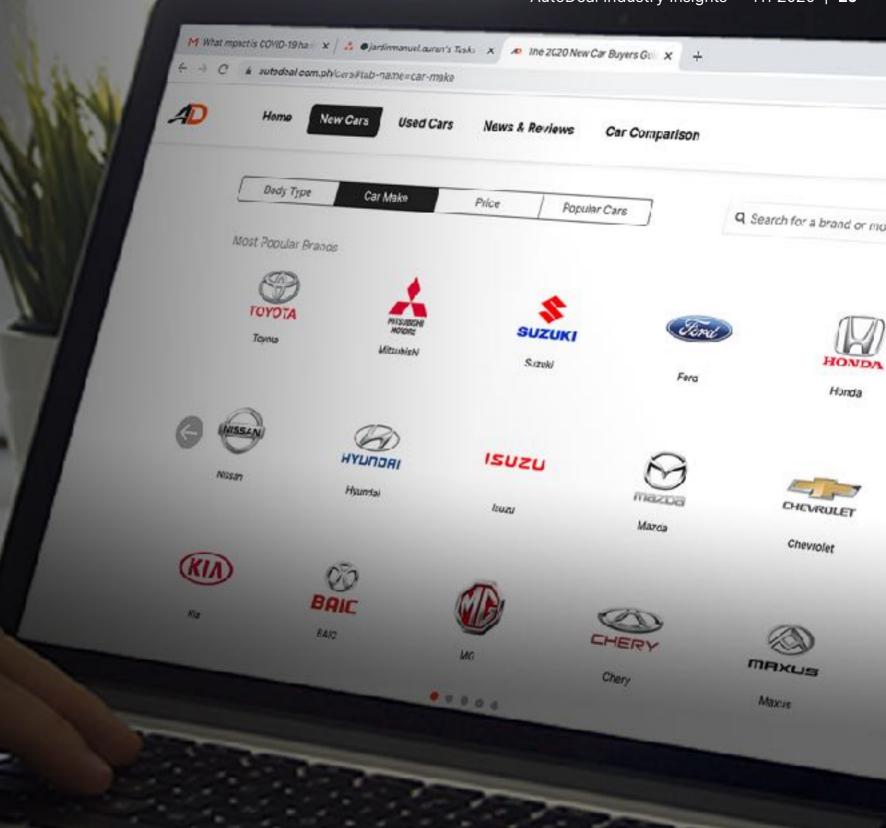
However, what happens when the game changes overnight? What happens when a global pandemic starts to rearrange the

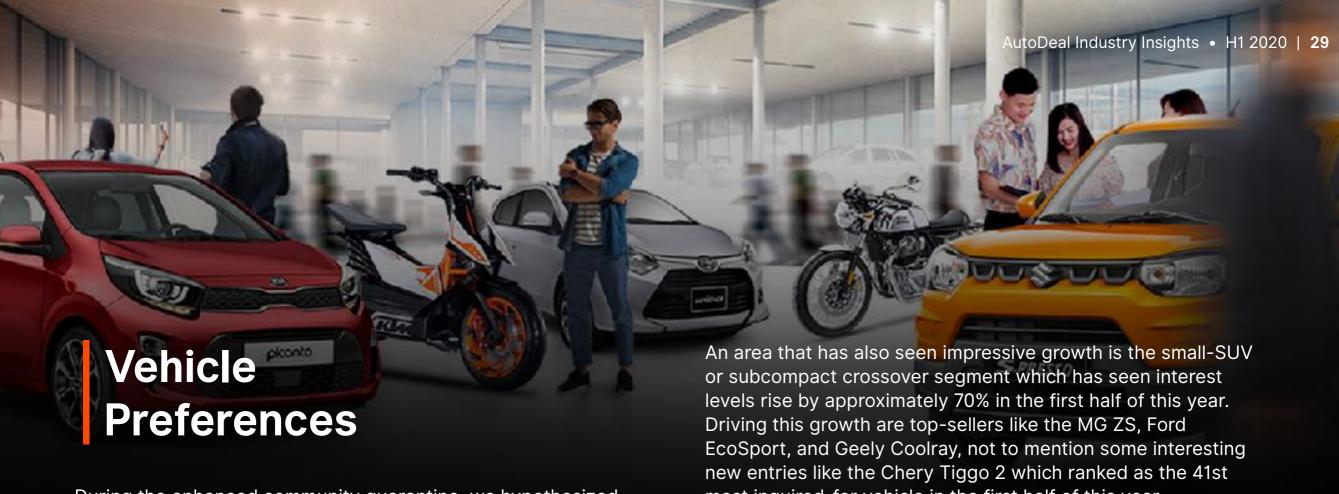
Here are just a few things that we've observed from data on how consumers and the car-buying journey are changing.

Increased transaction timelines

Consumers are spending longer durations in the car-buying process according to the average lead-to-sale conversion data from customers shopping on AutoDeal. In the first half of the year, the average lead-to-sale timeline took sixty-three (63) days from initial inquiry to final purchase compared to forty-six (46) days during the same period in 2019. Slower transaction periods could be occurring due to travel restrictions, slower bank approval rates, and increased consumer caution.

Dealers should be wary of increased purchase timeframes as they present a heightened risk of sales attrition to competitors. As more consumers shop multi-dealer; sales teams need to be prepped to manage leads over long periods of time to prevent unnecessary losses.





During the enhanced community quarantine, we hypothesized that there would be a spike in entry-level interest in the months that followed the onset of the pandemic. We haven't changed our minds on this yet.

In the first half of the year, we've seen significant growth in the interest level of subcompact cars. In particular, inquiries for subcompact vehicles grew from 23.8% in the first guarter of the year to 33.2% by the end of the second quarter.

By comparison, it appears that a big chunk of this growth has been ripped out of the seven-seater segments with interest levels on multi-purpose-vehicles (MPV's) dropping from 25% to 19% and Mid-Size SUV's which dropping from 13.5% to 10.6%.

The effects of this change can also be seen in our top vehicle model rankings; with the once-unstoppable Toyota Rush and Mitsubishi Xpander's being replaced by smaller vehicles like the Toyota Vios, Toyota Wigo, Suzuki S-Presso, and Honda Brio.

most inquired-for vehicle in the first half of this year.

With consumers' interest now fixated on more affordable vehicles, a new-era of China-made dominance is poised to take hold with brands like MG, Geely, and Chery with the most to gain. It's clear that the automotive industry's old-guard need to keep a careful eye on their flanks, not only for a Chinese invasion, but also to protect themselves against rising interest in the second-hand market.

Based on our recent data, approximately 15% of consumers who shop for new cars also simultaneously inquire with used cars, with the majority of them often browsing the subcompact market. If auto loans for new cars become less obtainable due to tighter approval, then there's a sizable risk for more consumers to look for cheaper retail priced vehicles among used cars. As such the one segment that could potentially provide stability for the new car market could also very well be the first one to come under fire.

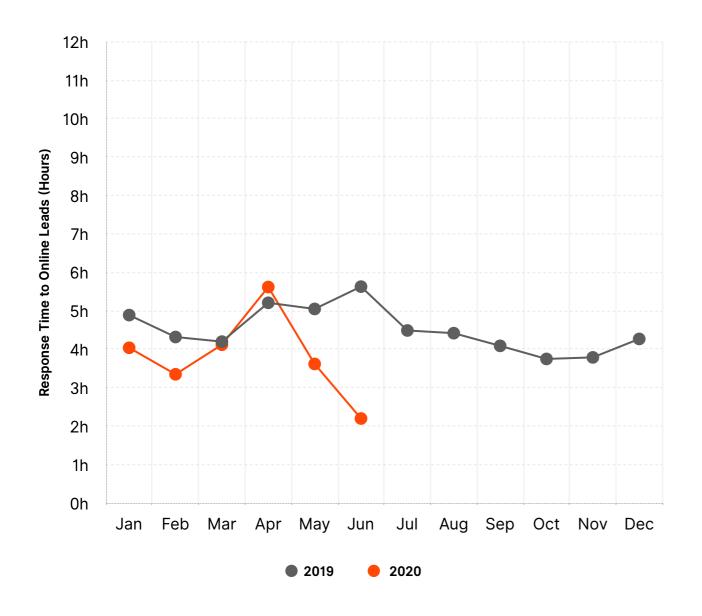
New Car Dealer Dealer Talk

AUTODEAL

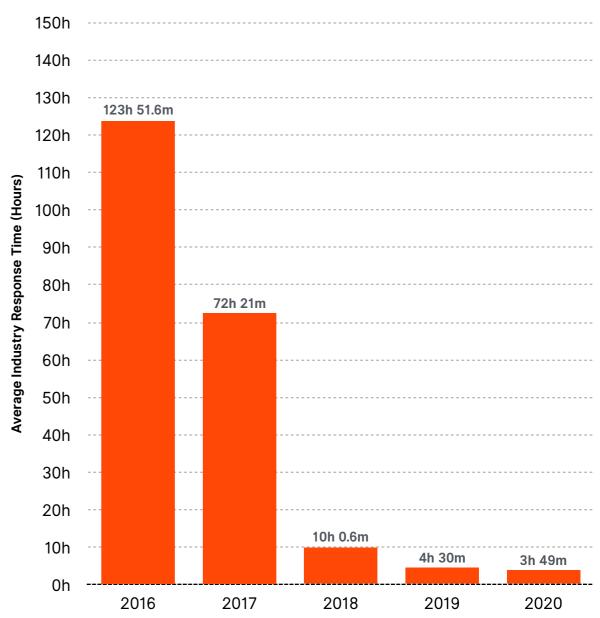
New Car Dealer Industry Response Time

AutoDeal continues to pioneer online customer service standards through

Average Industry Response Time (All Dealers)



Average Industry Response Time (2016-2020)



^{*}As tracked through the AutoDeal Lead-Management System

Industry Response Time

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

TOP 10

Fastest Responding New Car Dealers



FORD, Commonwealth 8 minutes



FORD, Balintawak16 minutes



FORD, Cagayan De Oro 8 minutes



CHEVROLET, Quezon Ave.17 minutes



FORD, Davao 8 minutes



FORD, Zamboanga 17 minutes



VOLKSWAGEN, BGC12 minutes



VOLKSWAGEN, Pampanga 18 minutes



FORD, Sta. Rosa
14 minutes



NISSAN, General Santos
19 minutes

Industry Response Time

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

Fastest Responding Used Car Dealers



CAR EMPIRE 1hr 2mins



EAST CARS 1hr 14mins



SAMCARS TRADING 1hr 55mins



J.A. TAN CAR TRADING 4hr 5mins



NIX ASH OTO PWESTO 6hr 20mins



ALL CARS MANILA -CHUCK UGARTE 7hr 9mins



GOOD CARS TRADING 8hr 43mins



AUTO ROYALE CAR EXCHANGE - LITO NALUS 9hr 26mins



BDO PRE-OWNED CARS 11hr 23mins



HONDA YUCHENGCO **PRE OWNED CARS** 12hr 18mins

TOP DEALERS

In terms of Lead-to-Sales Conversion

January 2020

February 2020

March 2020



FORD, Bohol **22.2**%



FORD, Zamboanga 12.5%



HYUNDAI, Ilocos Norte **25**%



MITSUBISHI MOTORS, Pili 16.77%



MAZDA, Dagupan 11.76%



NISSAN, Zamboanga 20%



HYUNDAI, llocos Norte **16.67**%



FORD, Negros Occidental **10**%



FORD, Metro Baguio 11.11%



FORD, Ormoc **14.29**%



NISSAN, Bataan 10%



FORD, Ilocos Norte 11.11%



NISSAN, Palawan 14.29%



CHEVROLET, Ilollo **9.09**%



NISSAN, Cabanatuan 8.33%

TOP DEALERS

In terms of Lead-to-Sales Conversion

April 2020

May 2020

June 2020



CHEVROLET, Dagupan **18.67**%



FORD, Ilocos Norte **25**%



SUZUKI AUTO, Roxas 33.33%



FORD, Naga **12.5**%



FORD, Tacloban 22.22%



SUZUKI AUTO, West Ave. **25**%



FORD, Dumaguete 11.11%



NISSAN, Isabela 11.11%



FORD, Subic **12.5**%



NISSAN, Cagayan De Oro 7.69%



KIA, Pangasinan **8.7**%



KIA, Isabela **12.5**%



FORD, Commonwealth **6.45**%



KIA, Butuan 8.3%

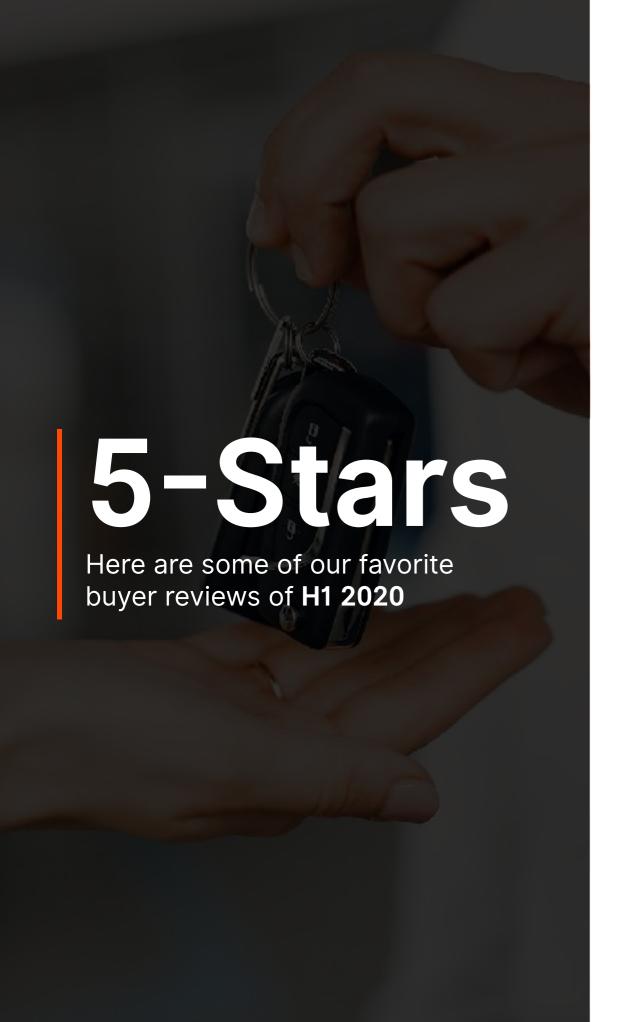


FORD, Dipolog **7.14**%

TOP Sales Agents

AutoDeal Agents with the best lead-to-sale conversion in H1 2020

1	\$ SUZUKI	Che Reguera Suzuki Auto, West Ave.	50%	11	NISSAN	Ivy Grace Balertie Nissan, Palawan	7.89%
2	Ford	Elyrose Mae Ignacio Ford, Subic	22.22%	12	NISSAN	Leones Batalla Nissan, Cagayan De Oro	7.38%
3	Ford	Gerald Meguillo Ford, Bohol	20%	13	B) HYUNDAI	Ivy Joy Currimao Hyundai, Ilocos Norte	6.82%
4	Ford	Maria Mercedes Santillana Ford, Subic	12.5%	14	KIA	Cirus Mindaros Kia, Isabela	6.67%
5	Ford	Jamaica Asico Ford, Libis	10%	15	NISSAN	Vanessa Cristobal Nissan, Ilocos Norte	6.25%
6	Ford	Jennifer Asebias Ford, Global City	10%	16	₩ N	Rondell Relativo Mazda, Davao	6.17%
7	Fired	Ronald Pantanosas Ford Bohol	10%	17	Ford	Rhona Calvo Ford, Negros Occidental	5.56%
8	TOYOTA	Arden Austria Toyota, Santa Rosa	9.3%	18	NISSAN	Erica Mae Castro Nissan, Zamboanga	5.56%
9	Ford	Jasmin Snyder Ford, Tacloban	8.7%	19	NISSAN	Wilson Jr Tello Nissan, Baguio	5.48%
10	Ford	Jomar Dumas Ford, Ilocos Norte	8.7%	20	NISSAN	Czarina De Jesus Nissan, Bataan	5.38%





Dana Sandiko Toyota, Manila Bay ****



Sourcing different deals from AutoDeal need extra help from expert. Dana, who's first to response provide different options and help me to decide with my car prospect. Convo never stop and until my approval, released day, she's there to assist me. Kudos to Ms Dana/TMB for SUPER fast transaction. Connect with her and don't hesitate to inquire. Thanks again

Ryan Flores

purchased a Toyota Avanza 1.3E AT



Maila Anne Ramirez Ford, Metro Baguio



She has been so helpful from start to finish. We planned to have a car before the lockdown and she helped us from February to June. She followed up and constantly asked for our needs and wants and was also part of why we ultimately got the car. She was so helpful and the best sales agent I have ever worked with. Keep it up Ford! And thank you Mai!

Dianne Honorio

purchased a Ford Ranger 2.0. Biturbo Wildtrak 4x4 AT



Salie Sabellano Isuzu Pasiq ****



Salie responded to my quote request through Autodeal immediately. She is very courteous. She accomodated my questions even late at night. She sent me the quotation, complete with full specs of the unit and the freebies that comes with it. Isuzu Pasig is very lucky to have an agent like her.

Henry Domingo purchased a Isuzu mu-X 3.0. LS-A 4x2 AT Blue Power



Jowell Macario Toyota, Bacoor Cavite ****



Helpful, friendly and accomodating! Jowell was very diligent and attentive during the car purchase process. He answered all our questions and provided us a great deal. Customer service was exceptional. We had the best car buying experience ever!

Joyce Vianney Abando purchased a Toyota Vios 1.3E Prime CVT



Tanya Tupaz Ford, Global City ****



I am a 51 yr old American and have purchased many cars in my life, from Mercedes to Jaguar to Landrover. Having dealt with all of these dealerships I cannot tell you how amazed I was at the level of service provided to my wife and I by Tanya Topaz. I have spent literally days at some of the aforementioned dealerships trying to complete the purchase process. We were able to select our vehicle with Tanya guiding us the whole way and complete the entire sales process in under 2 total hours. I would never have thought my best car buying experience would happen Makati Philippines but that is exactly what is was. Ford should be extremely proud of the work they have done to select and train the very best agents I have met. I will be highly recommending Global City Ford and Tanya Topaz to all of my friends here in the Philippines. Thank you so much for providing such an enjoyable experience for my wife and I.

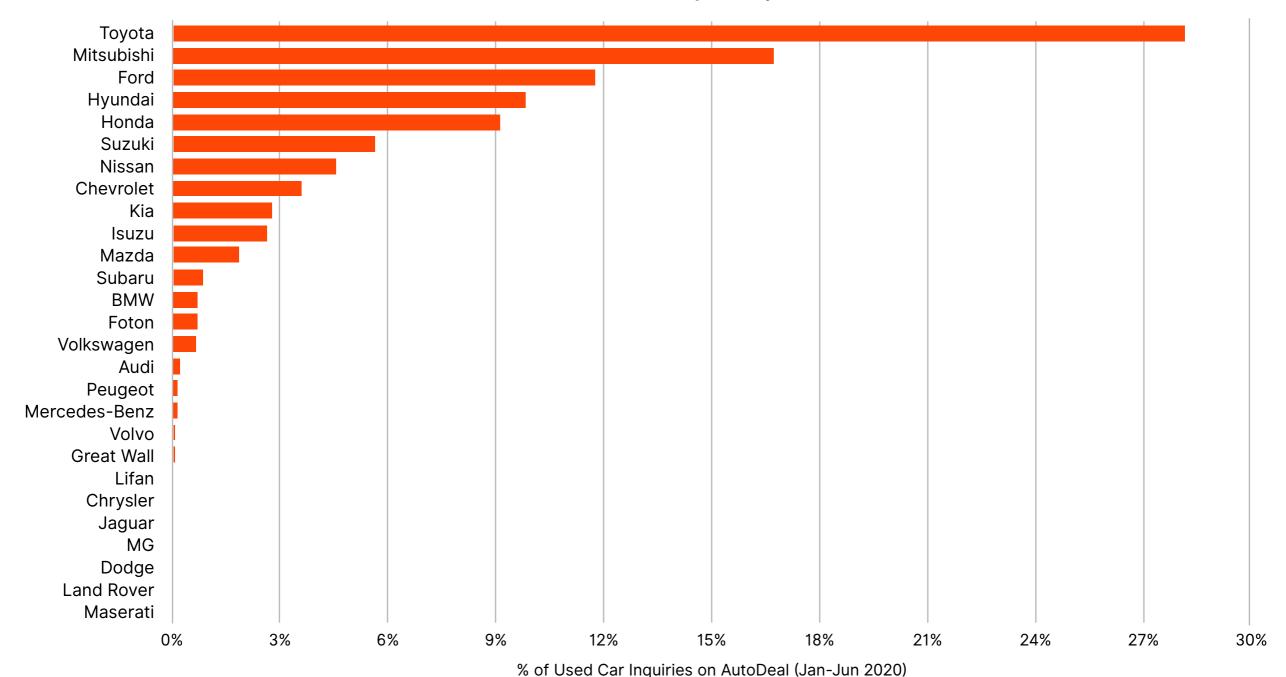
Guilo Family

Purchased a Ford Ranger 2.0 Bi-Turbo Wildtrak 4x4 AT



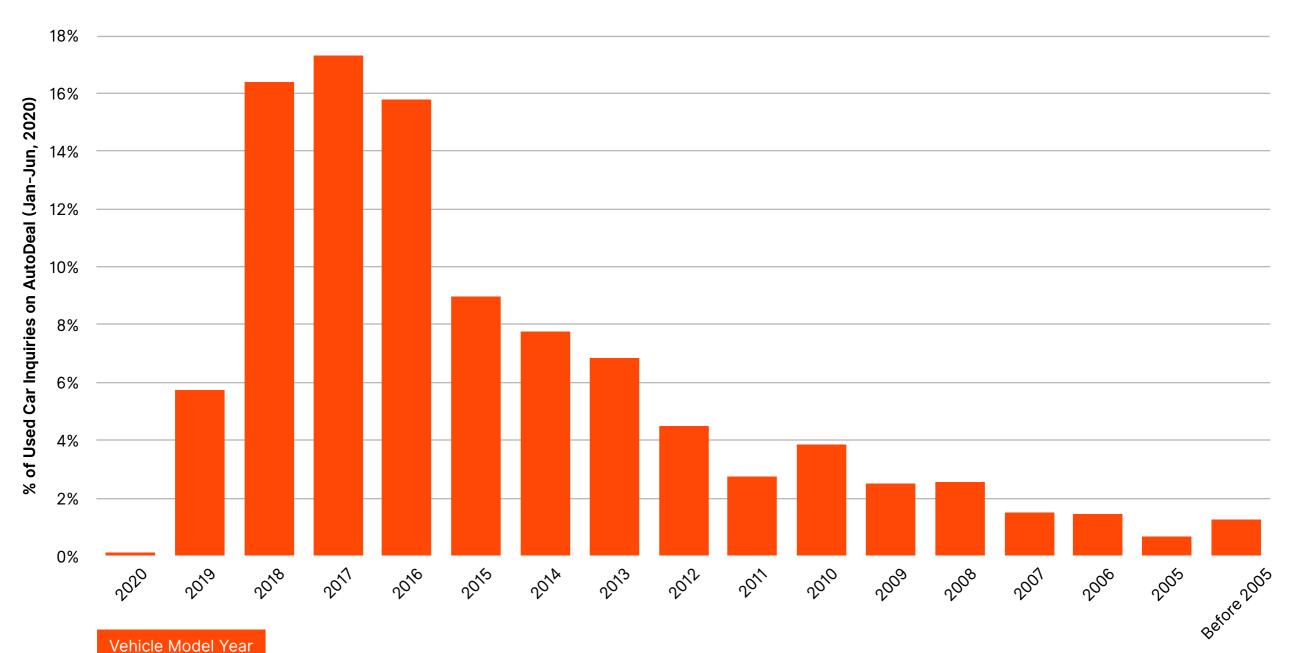
What are used car buyers shopping for?

AutoDeal Used Car Inquiries by Brand (H1 2020)

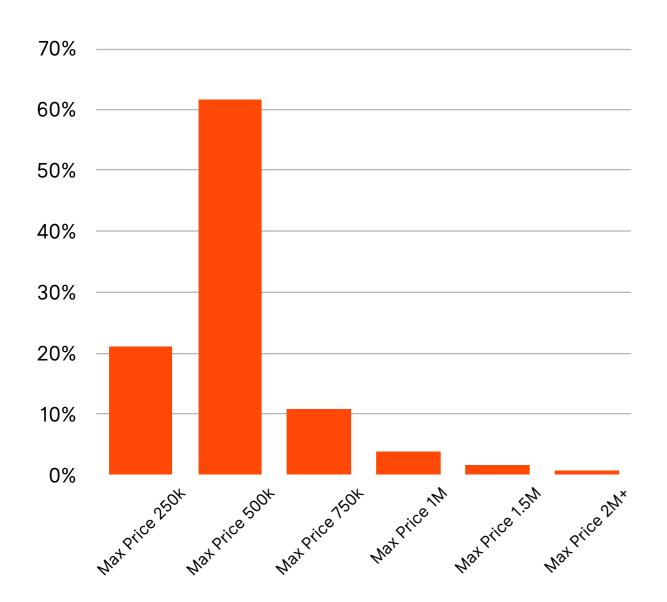


What are used car buyers shopping for?

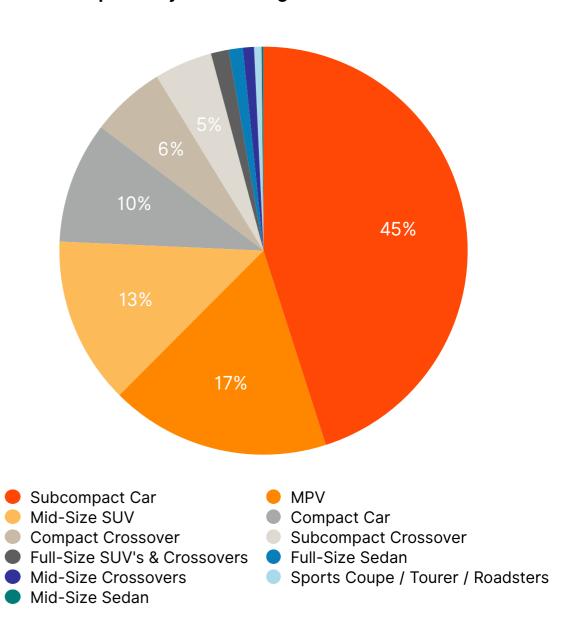
AutoDeal Used Car Inquiries by Vehicle Model Year (H1 2020)



Used Car Searches by Price Range on AutoDeal.com.ph (H1 2020)

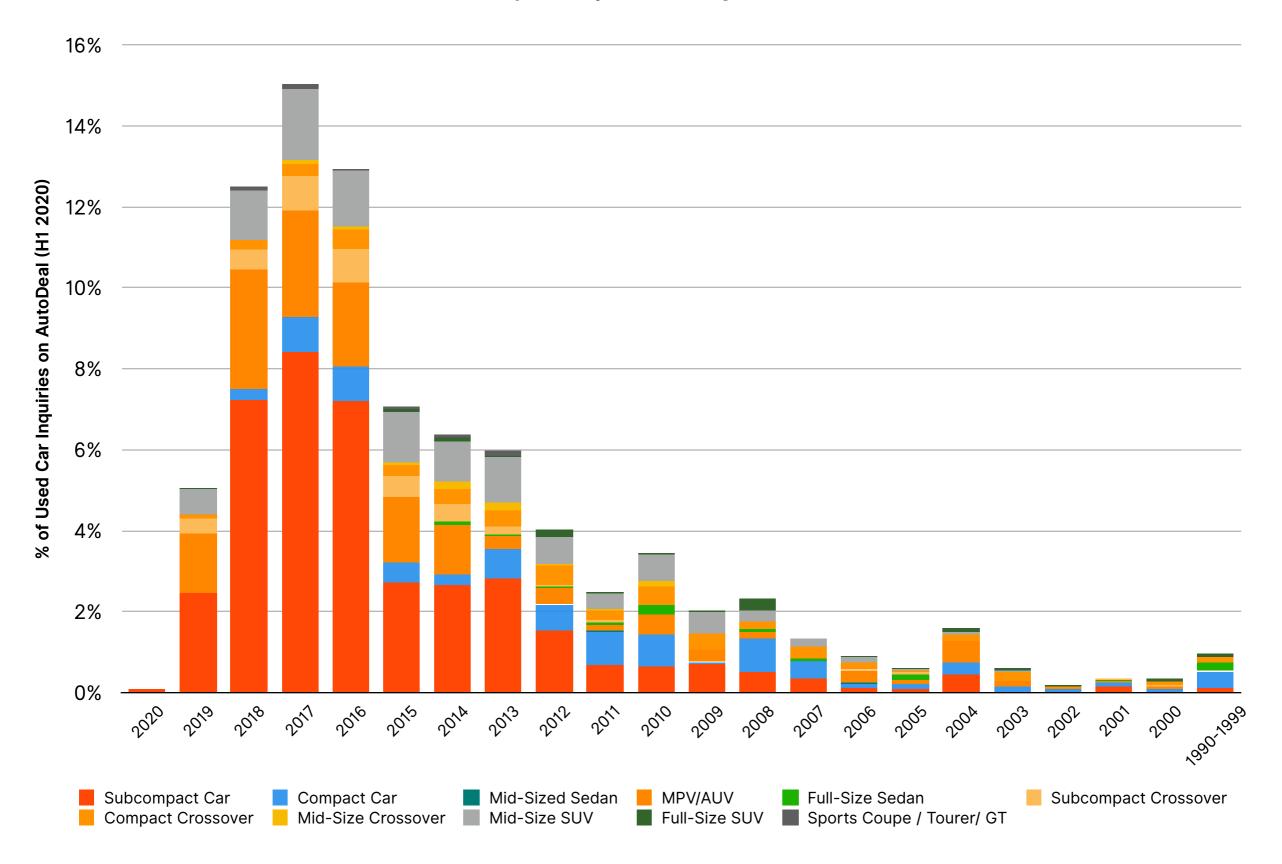


Used Car Inquiries by Vehicle Segment on AutoDeal (H1 2020)



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

Used Car Inquiries by Market-Segment & Model Year





MOTODEAL

Join the Philippines no.1 online automotive marketplace.



8.9K
Facebook Likes



1.7K
E-Mail Subscribers



1.67K
YouTube Subscribers



257
Instagram Followers

360,062 Monthly Visits

233,426
Monthly Unique

1,018,632
Monthly Pageviews

00:02:00

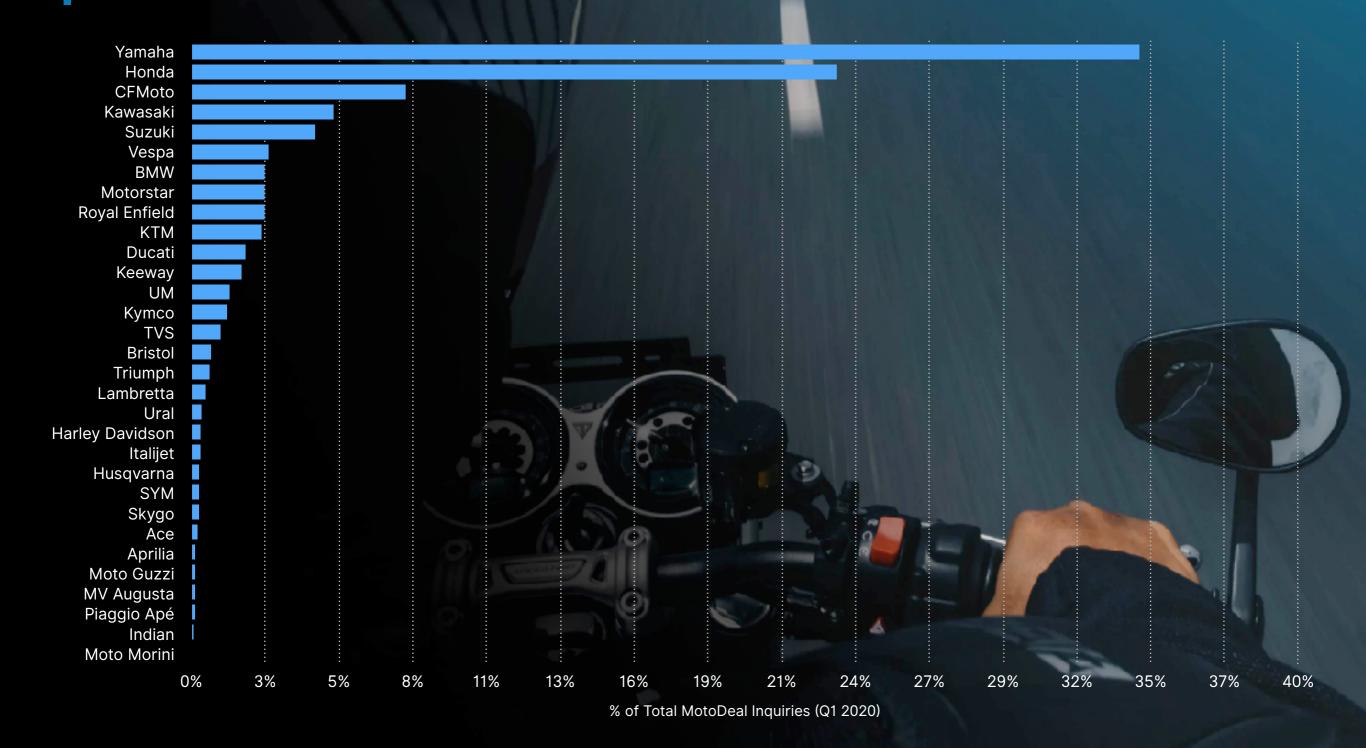
Ave. Visit Duration

47.35%
Bounce Rate



Most Inquired for Brands

Which brands were online consumers drawn to in H1 2020?















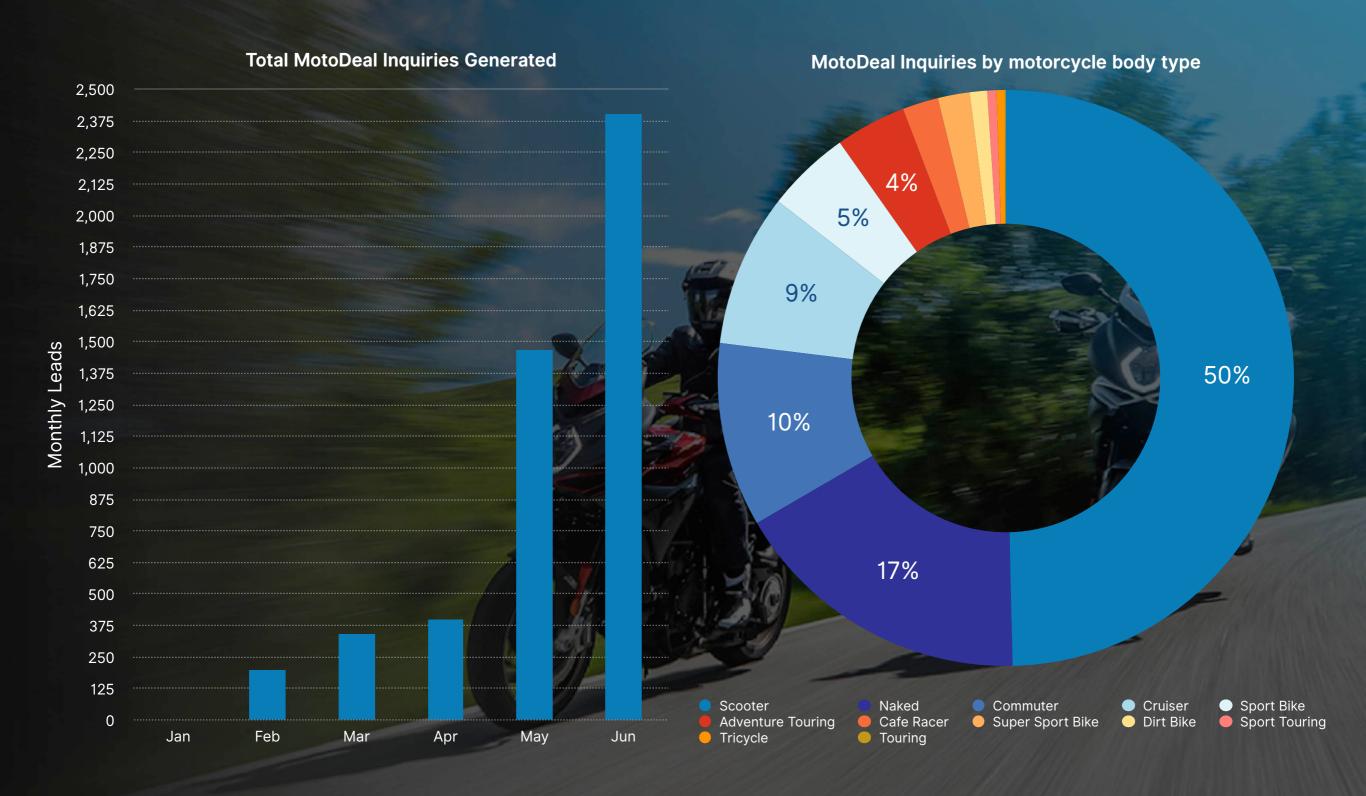






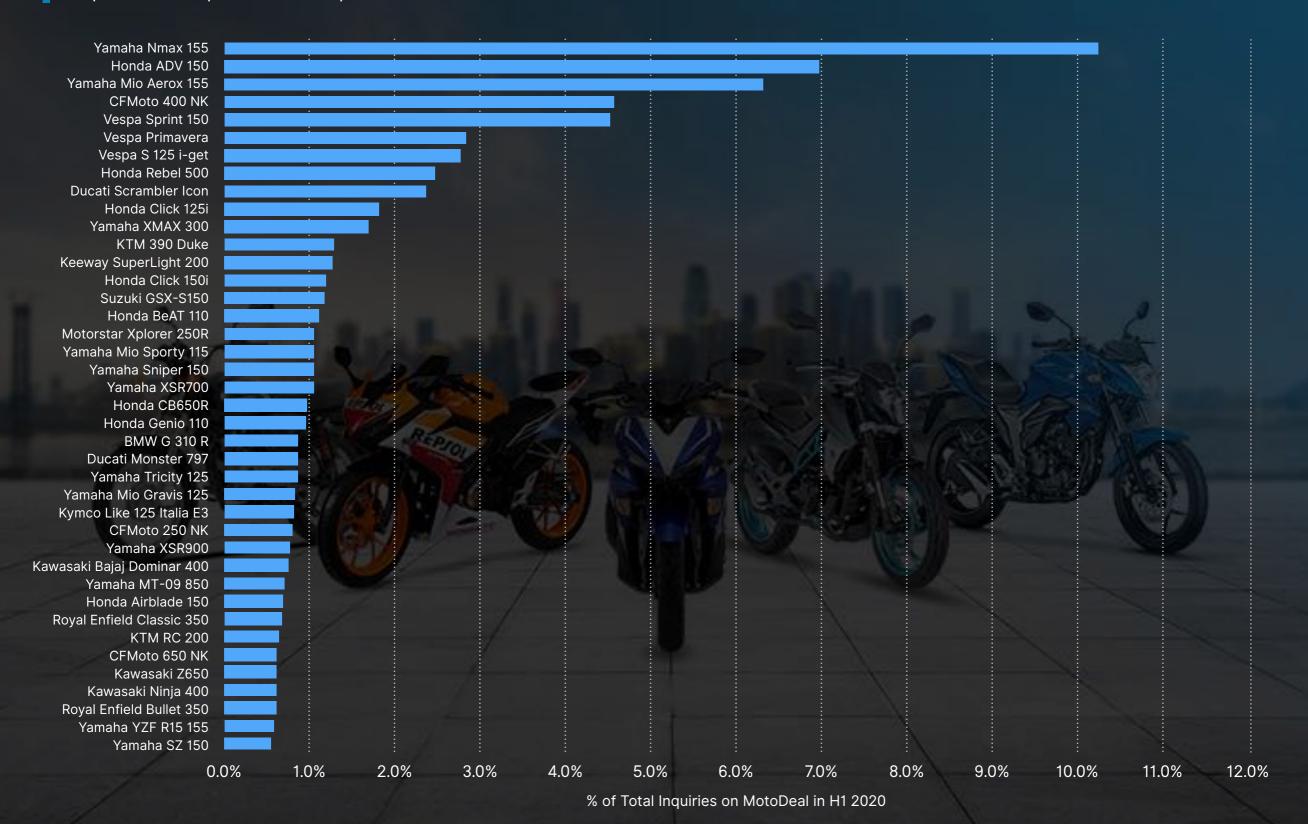


Motorcycle Quotes & Inquiries



MotoDeal: Top 40

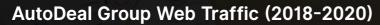
Top 40 most inquired for nameplates in H1 2020

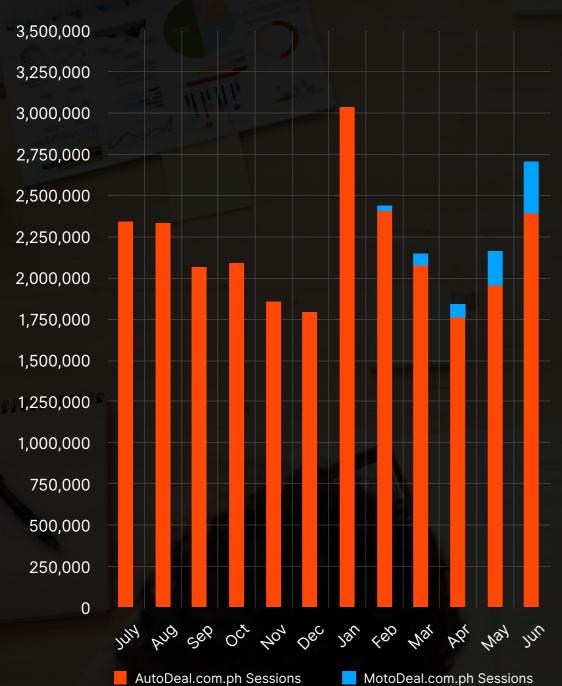




AutoDeal Group Profile

We are the no.1 automotive marketplace in the Philippines



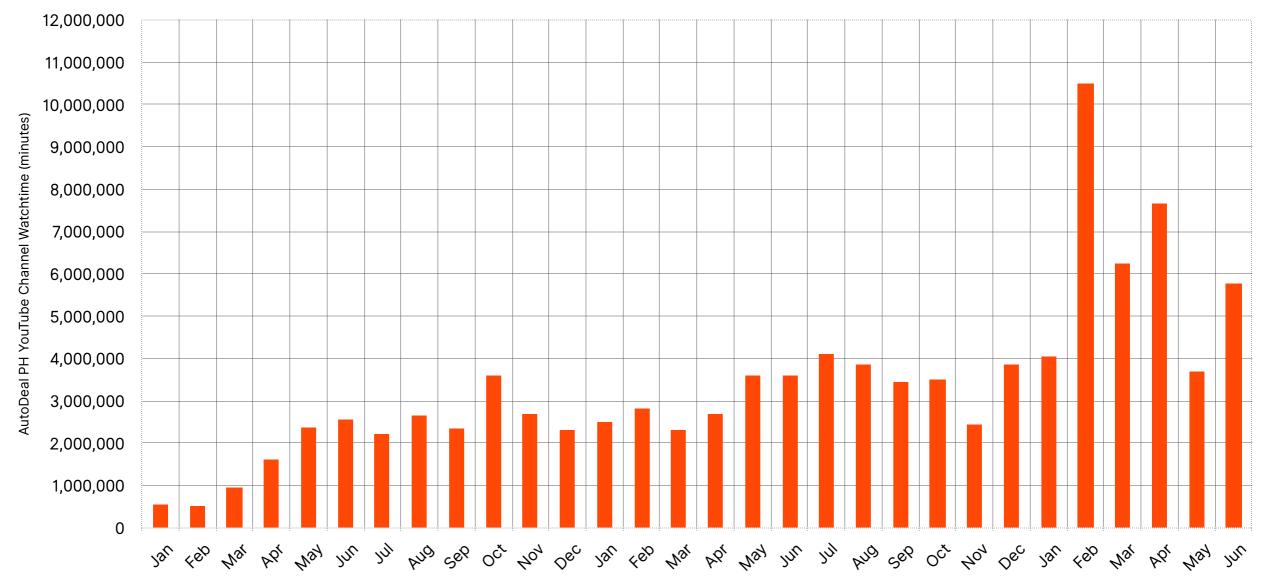


Website Visit and Social Media Figures

		AUTODEAL	MOTODEAL	TOTAL
January		2,956,768		2,956,768
February		2,406,372	32,616	2,438,988
March		2,073,071	72,859	2,145,930
April		1,761,763	78,788	1,840,551
May		1,951,266	209,470	2,160,736
June		2,391,967	316649	2,708,616
Total:		13,541,207	710,382	14,251,589
O Insta		17.3K	257	
YouTo Subs	ube cribers	176K	1.67K	
Facel Follow		590K	8.9K	
E-Ma Subs	il cribers	210K		

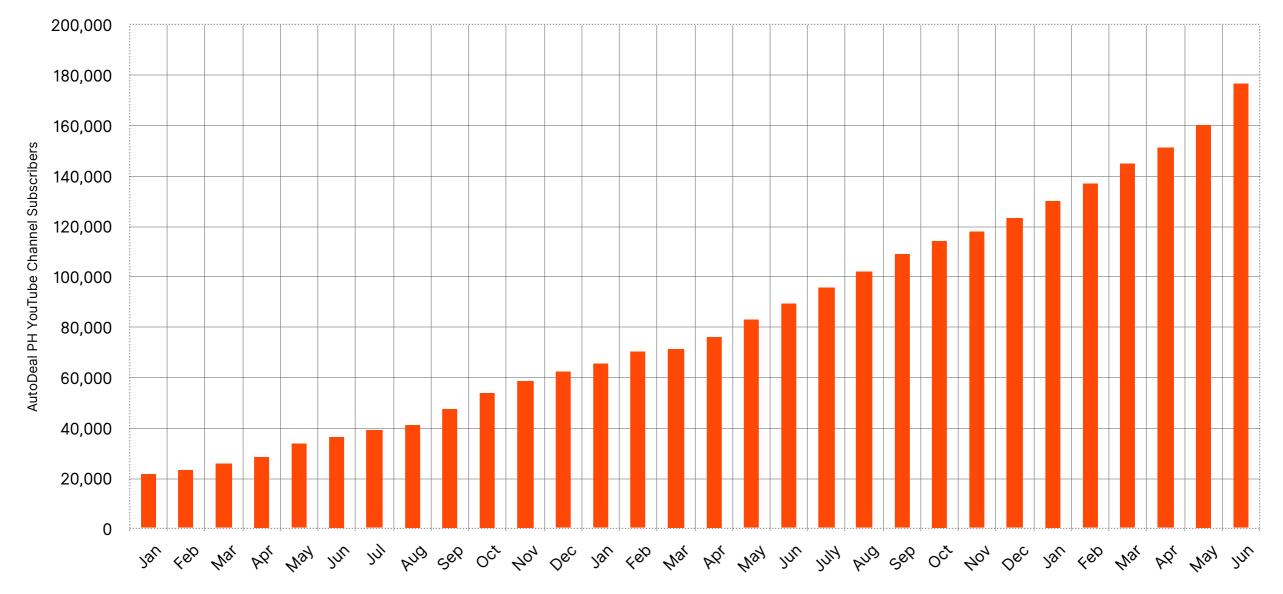
Now the no. 1 automotive YouTube Channel in the Philippines

AutoDeal YouTube Monthly Watchtime



Now the no. 1 automotive YouTube Channel in the Philippines

AutoDeal YouTube Subscribers

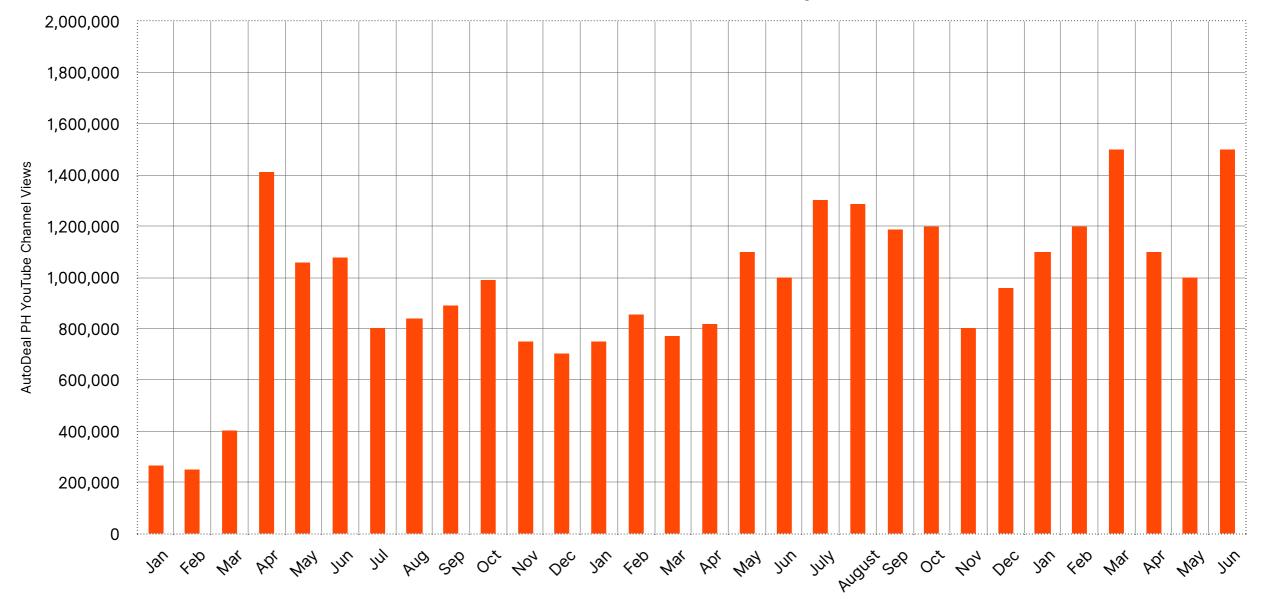


32,000,000 Total Video Views

AutoDeal Video

Now the no. 1 automotive YouTube Channel in the Philippines

AutoDeal YouTube Monthly Views



176,659 Total Subscribers

TOP 5 Most viewed videos of H1 2020



2020 TOYOTA HIACE SUPER GRANDIA **ELITE AND GL GRANDIA TOURER**

Behind the Wheel | Published 4th March, 2020



423,883 views



4,376 Likes



311



Comments







715 Comments



2020 MAZDA 3 2.0 SKYACTIV PREMIUM AT

Behind the Wheel | Published January 28, 2020



220,822 views



4,077 Likes



Comments



2020 GEELY COOLRAY

2019 ISUZU D-MAX 4X4

Behind the Wheel | Published March 16, 2020



218,533 views



2,067 Likes



264 Comments

TOP MOTORCYCLE VIDEO



2019 VESPA GTS **300 SUPER SPORT**

Published March 25, 2020



75,730 views

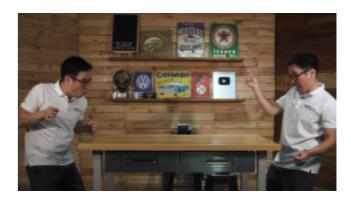


799 Likes



68 Comments

Note: Click the images to view videos



TOP 5 CARS UNDER P1M

Behind the Desk | Published February 29, 2020



172,457 views



3,463 Likes

614 Comments



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AutoDeal.com.ph

10 Jupiter Street Bel-Air Makati City, Philippines

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: 8894 18 91