

INSIGHTS

AutoDeal.com.ph | Q3 2019 - Vol. X
Philippine Automotive Industry Report



AUTODEAL
Cars Sold, Everyday.



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15	New Car Sales & Conversion What are the shoppers buying? How long is it taking them to buy? We showcase data related to sales volumes and conversion.	35	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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Process Prowess

The last few months in the Philippine automotive industry have witnessed a heavy focus on discussions on “the cars of the future”. This was made palpable not only by the extensive footage from the last Tokyo Motor Show but also by pinnacle events in the local scene; most notably by a significant marketing push by Toyota Motor Philippines on the Hybrid version of the all-new Toyota Corolla Altis. With electric and hybrid vehicles now being spoken about more earnestly by major market players, we can see a significant aspiration by brands to be present in this arena once the infrastructure in the country can be developed to support it.

However, while brands and dealers prepare for the car of the future, they must also look to the “customer of the future” and aim to adopt practices to deal with a market of consumers who are more informed, more empowered and less satisfied with a traditional age-old sales process. A recent study by Accenture entitled “The Future of Automotive Sales” concluded that “Young customers expect hassle-free online purchase options and dislike cumbersome price negotiations at the dealership. Automotive OEMs therefore need to rethink their sales strategy to meet the demands of tomorrow’s customers and guarantee future success.”

I’ve spent much of the last few weeks visiting car dealerships up and down the Metro, speaking specifically about the purchasing patterns of today’s consumers. Backed by browsing and inquiry data, we have shown that on average approximately 75% of prospective car-buyers will shop simultaneously across multiple brands and numerous dealers. Even for some of the most popular nameplates like the Toyota Rush or Mitsubishi Xpander; we’ve seen that more than 60% of interested prospects will

simultaneously inquire with another vehicle. Moreover, these consumers are shopping across multiple vehicle segments, with more than 100 other models sharing inquiries with both the Rush and Xpander. Consumers therefore are no longer shopping with an “apples to apples” approach, but deliberating their purchase consideration across multiple different segments and often much broader price brackets.

As such we continue to approach a pivotal point where success may not be derived by who has the loudest marketing voice, but by who has the best process to manage their prospective customers. As such car brands and dealers need to be showing prowess in process not just as a formality to manage data, but to create the very best experience for their customers.



Christopher L. Franks
AutoDeal Chief Operating Officer



Q3 SUMMARY

AutoDeal is the no.1 automotive marketplace in the Philippines



6,739,132
WEBSITE VISITS

By Car Buyers, Vehicle Owners, and Enthusiasts



84,412
QUOTES & TEST DRIVES

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



4,395
CONFIRMED PURCHASES

Tracked and confirmed from users who submitted leads in Q3 2019



115,891
CONVERSATIONS

Back and forth messages between prospective car buyers and dealers

QUICK FACTS

Key take home points from our Q3 Report



77.50%

Of AutoDeal.com.ph buyers shop for vehicles using their smartphone



51 Days

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



P1.31M

The Average price of vehicle sold on AutoDeal.com.ph in Q3 2019



30 minutes

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

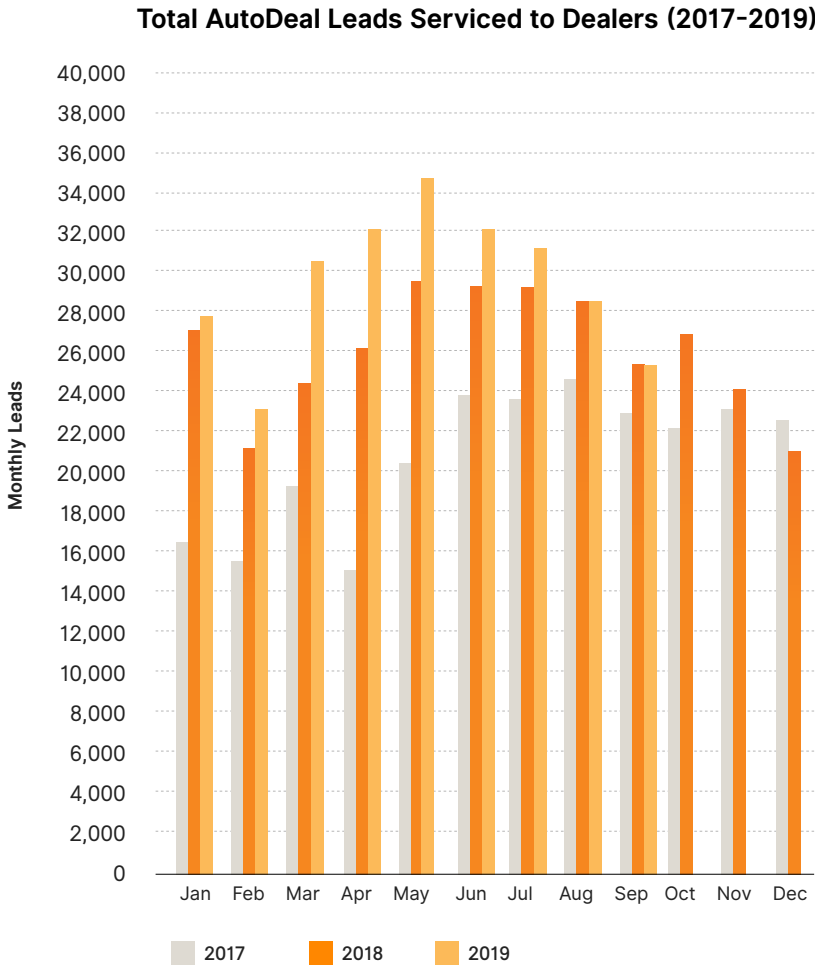
Note: Data indicated is from the analysis of visitors accessing AutoDeal.com.ph from July 1 to September 30, 2019.

A person wearing an orange checkered shirt is sitting at a desk, typing on a laptop. The image is overlaid with a semi-transparent orange filter.

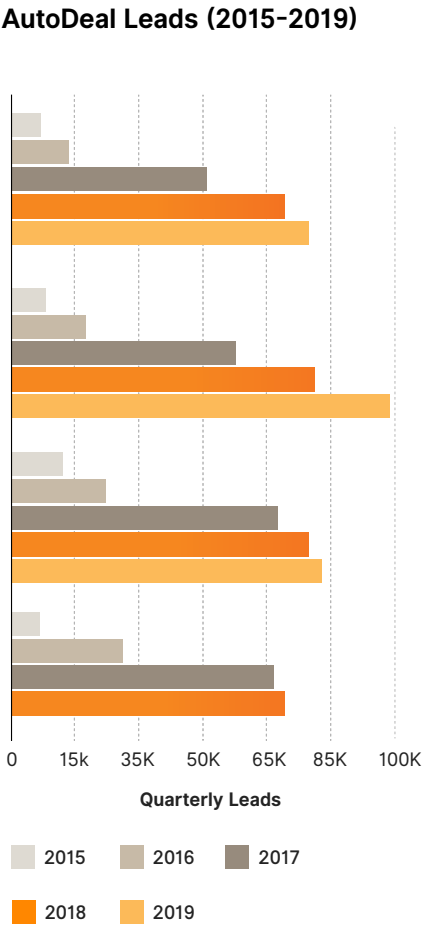
CONSUMER INTEREST & LEADS

QUOTES, TEST-DRIVES & INQUIRIES

Total online car buying inquiries are up by 2.29% year on year, down by 14.2% from Q2 2019.

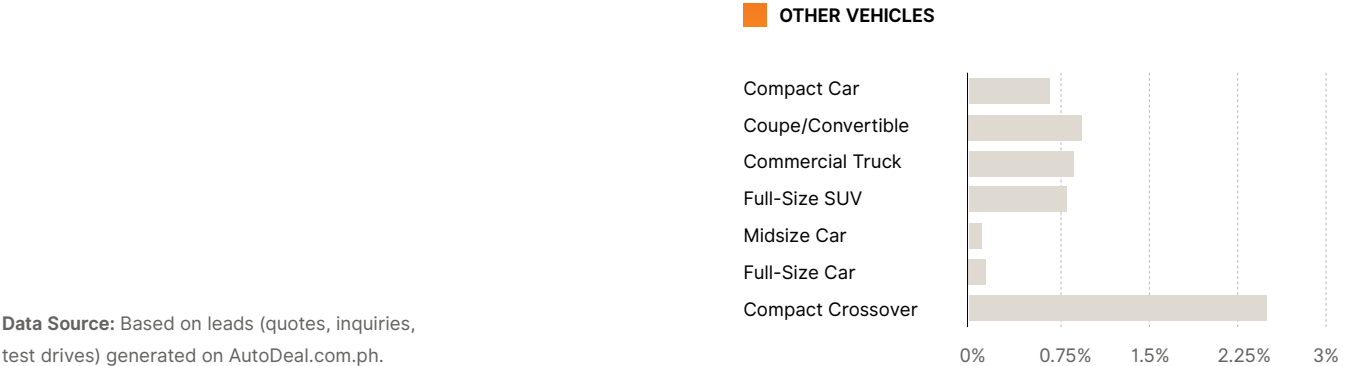
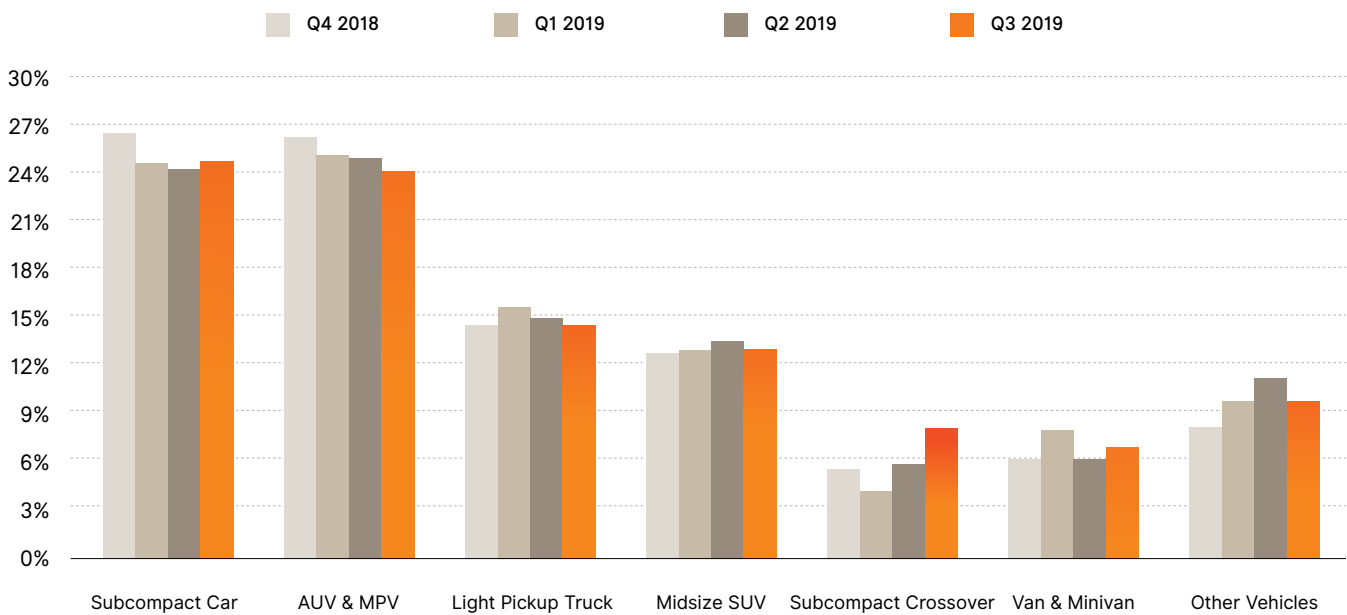


Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.com.ph.



LEADS BY MARKET SEGMENT

Based on AutoDeal inquiries for major vehicle categories

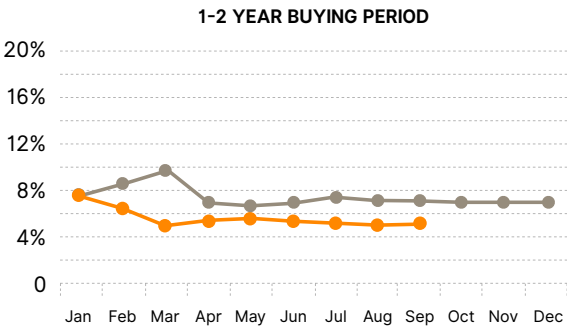
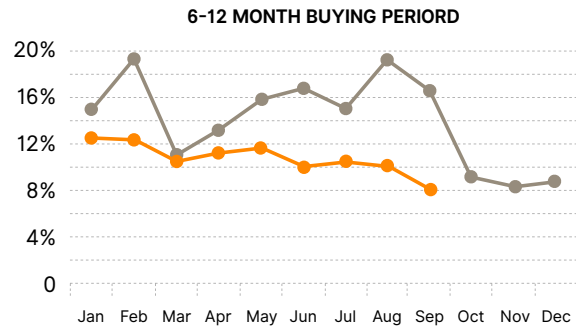
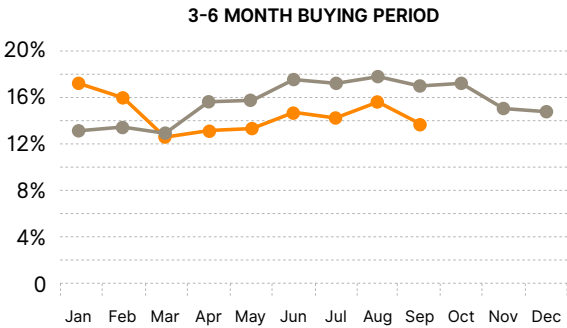
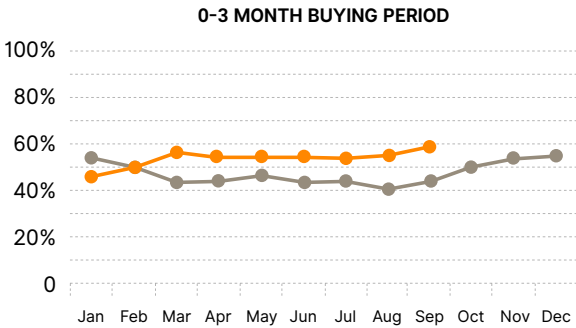


Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.com.ph.

INQUIRING & BUYING TRENDS

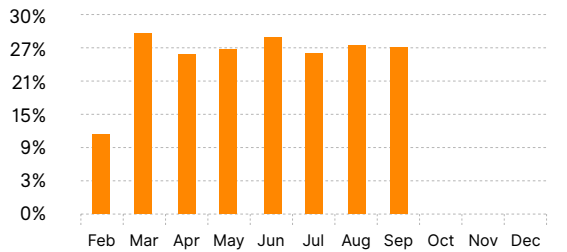
Purchase intent continues to be persistently faster than 2018

Inquiry to Sale Transaction Timeframe



● 2018 ● 2019

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 Q3 2019

Metro Manila

29.76%

% of Total Leads

1	Quezon City	7.91%	-
2	Manila City	4.10%	-
3	Makati City	3.44%	-
4	Pasig City	2.58%	-
5	Taguig City	2.40%	▲
6	Caloocan City	2.19%	▼
7	Paranaque City	2.19%	-
8	Las Pinas City	1.94%	-
9	Mandaluyong City	1.72%	-
10	Muntinlupa City	1.30%	-

Visayas

7.78%

% of Total Leads

1	Cebu City	1.28%	-
2	Iloilo City	1.05%	-
3	Bacolod City	0.74%	-
4	Tacloban City	0.47%	-
5	Lapu-Lapu City	0.41%	-
6	Mandaue City	0.37%	-
7	Tagbilaran City	0.26%	-
8	Dumaguete City	0.25%	-
9	Talisay City	0.21%	-
10	Roxas City	0.16%	-

Luzon

47.75%

% of Total Leads

1	Bacoor City	1.90%	-
2	Dasmariñas City	1.76%	-
3	Imus City	1.74%	▲
4	Angeles City	1.66%	▼
5	Antipolo City	1.46%	▲
6	General Trias City	1.44%	▼
7	San Fernando City	1.21%	▲
8	Santa Rosa City	1.10%	▲
9	Calamba City	1.10%	▼
10	Baguio City	1.02%	-

Mindanao

14.71%

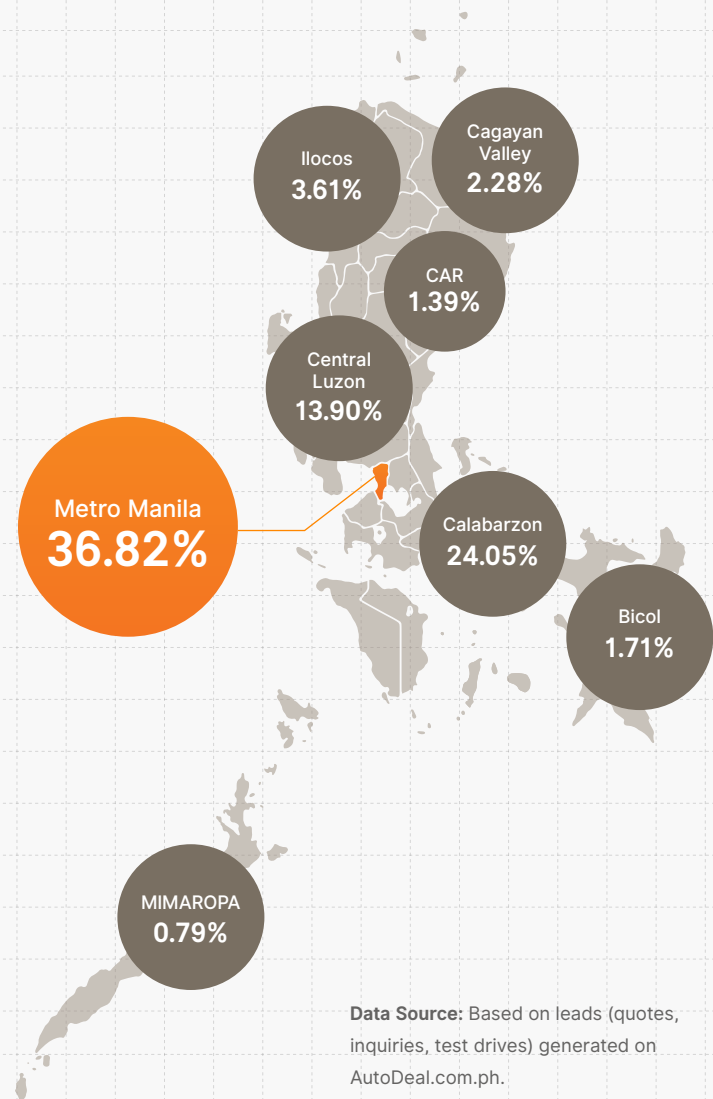
% of Total Leads

1	Davao City	2.44%	-
2	Cagayan De Oro City	1.51%	-
3	General Santos City	0.92%	-
4	Zamboanga City	0.68%	▲
5	Iligan City	0.37%	▲
6	Butuan City	0.37%	▼
7	Koronadal City	0.32%	▲
8	Tagum City	0.31%	▼
9	Pagadian City	0.23%	▲
10	Panabo City	0.16%	▼

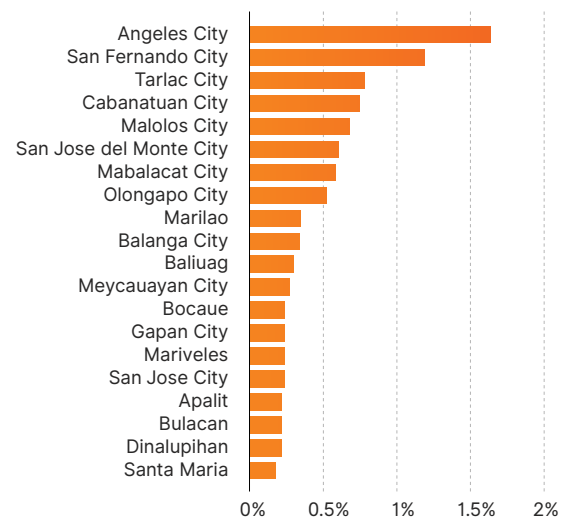


LUZON

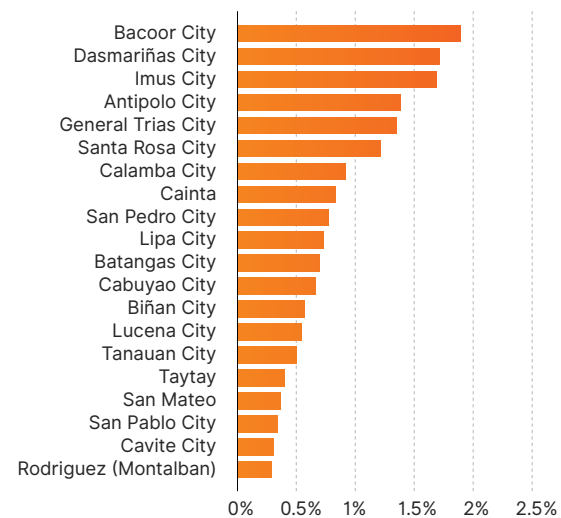
In-depth lead volumes



Top 20 Locations - Central Luzon



Top 20 Locations - Calabarzon

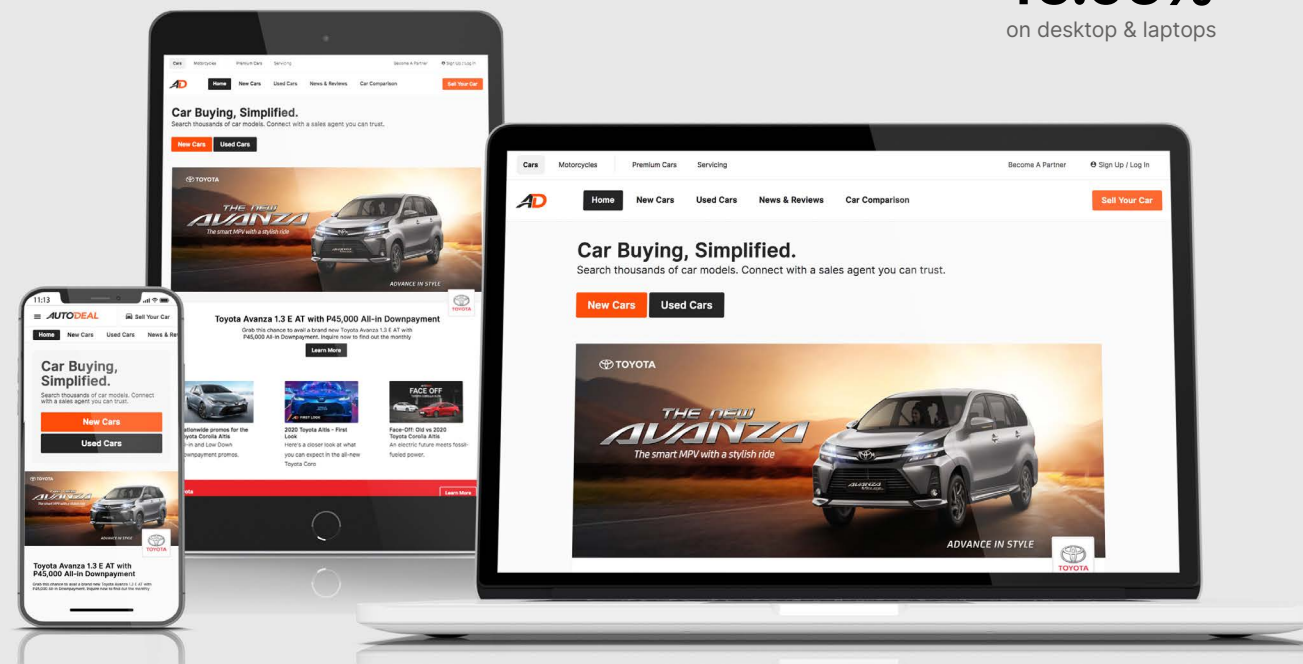


LEADS BY DEVICE

Inquiries made via mobile devices continue to rise

▼ 0.21%
3.97%
on tablets

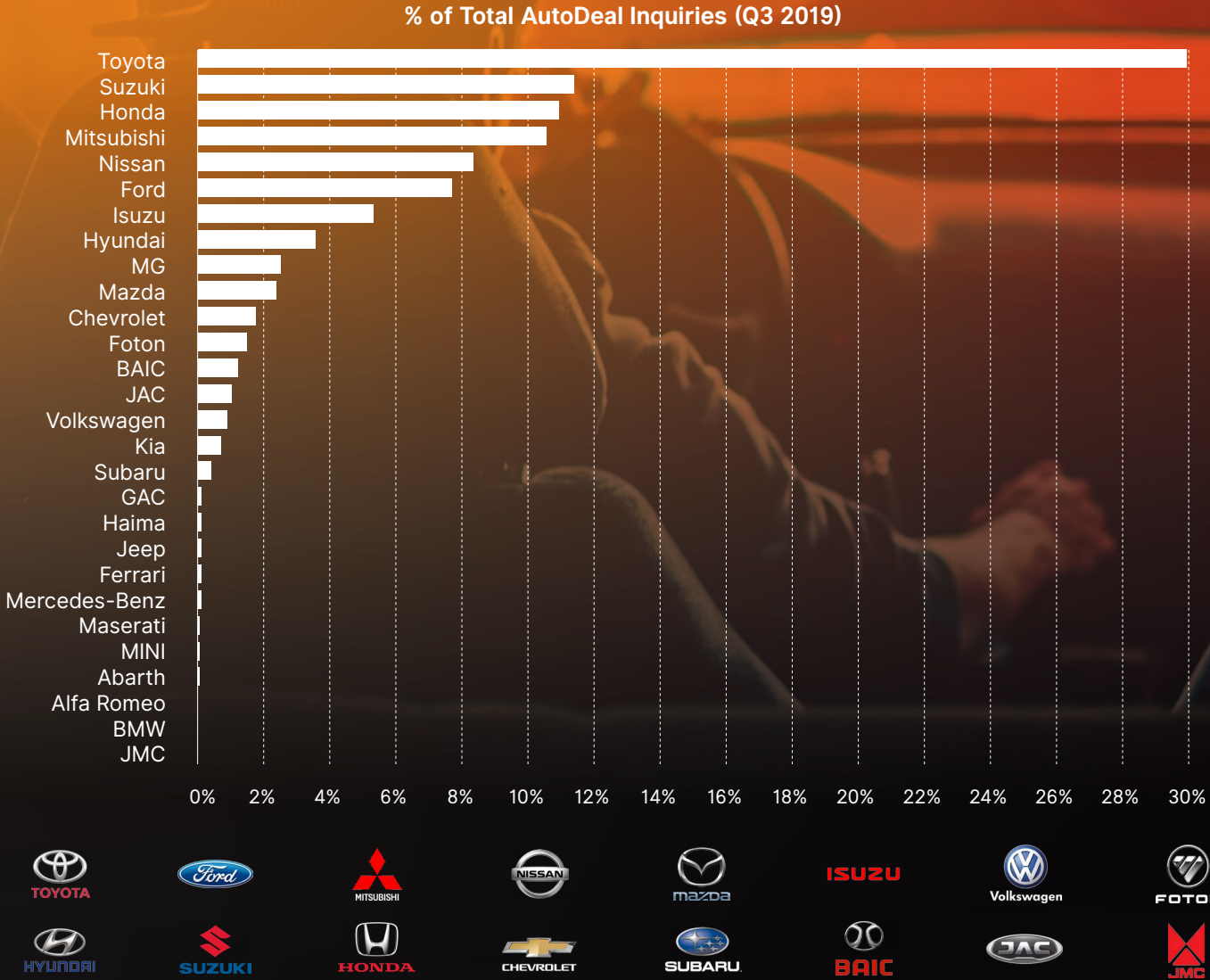
▼ 1.00%
18.53%
on desktop & laptops



▲ 1.21%
77.50%
on mobile devices

MOST INQUIRED FOR BRANDS

Which brands were online consumers drawn to in Q3 2019?

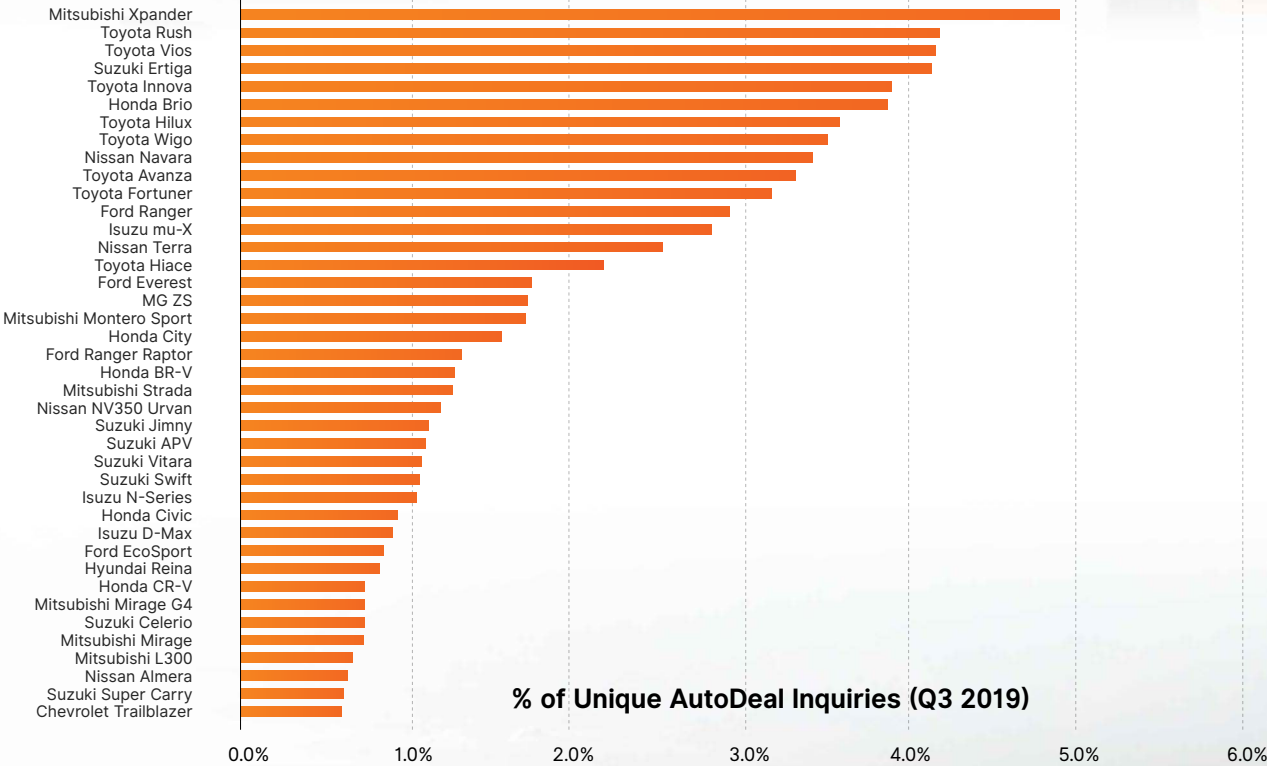


Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.com.ph.

AUTO DEAL

TOP 40

Most inquired for nameplates in Q3 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.

Nissan Mobility Tour 2019
Event Registration - 751

EVENT REGISTRATION FORM

Personal Contact Details

First Name Last Name Contact Number

Email Address

Location

Which car are you interested in?

Select car model variant

Nissan Almera 1.2 MT (Euro 4)	Manual Gasoline	P557,000
Nissan Almera 1.5 E MT (Euro 4)	Manual Gasoline	P735,000
Nissan Almera 1.5 E AT (Euro 4)	Automatic Gasoline	P824,000
Nissan Almera 1.5 V AT (Euro 4)	Automatic Gasoline	P900,000
Nissan Almera 1.5 V AT (Euro 4)	Automatic Gasoline	P900,000

Almera

GT-R

X-Trail

Juke

ANNIE SANTOS
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AUTODEAL
ENTERPRISE

New Car Dealer
**SALES &
CONVERSION**

Q3 | TOP SELLING NEW VEHICLES

Top Selling Nameplates on the AutoDeal Platform for Q3 2019

Compact Car



 **HONDA**
Civic

 **MAZDA**
3

 **TOYOTA**
Altis

Subcompact Car



 **TOYOTA**
Vios

 **TOYOTA**
Wigo

 **HONDA**
City

Coupe



 **FORD**
Mustang

 **MAZDA**
MX-5 RF

 **TOYOTA**
86

MPV



 **MITSUBISHI**
Xpander

 **TOYOTA**
Innova

 **TOYOTA**
Rush

Compact Crossover



 **HONDA**
CR-V

 **MAZDA**
CX-5

 **SUBARU**
Forester

Subcompact Crossover



 **FORD**
EcoSport

 **MG**
ZS

 **HYUNDAI**
Kona

Mid-Size SUV



 **NISSAN**
Terra

 **TOYOTA**
Fortuner

 **FORD**
Everest

Van



 **NISSAN**
Urvan

 **TOYOTA**
Hiace

 **FOTON**
Gratour

Pickup Truck



 **NISSAN**
Navara

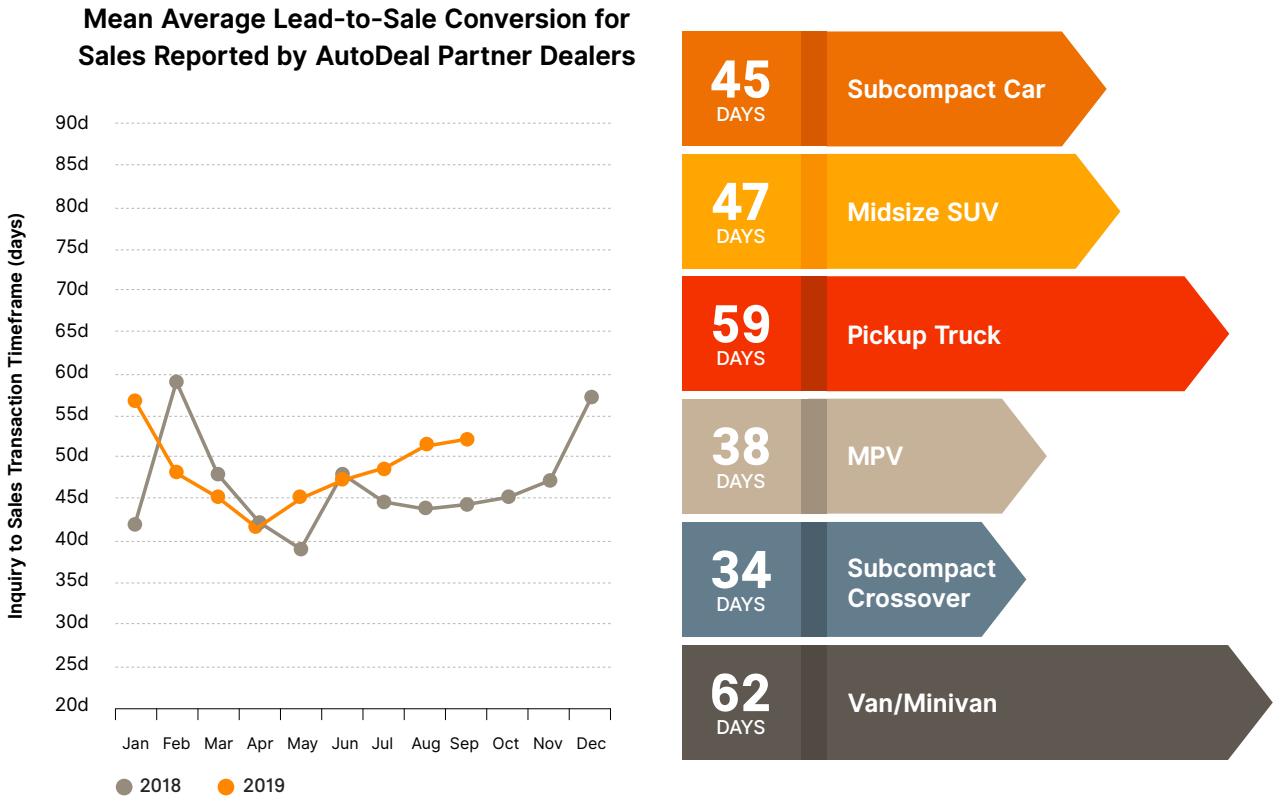
 **FORD**
Ranger

 **TOYOTA**
Hilux

Note: Data Based on leads reported as sold by AutoDeal Partner Dealers between July 1, 2019 and September 30, 2019.

NEW CAR CONVERSION TIMELINE

AutoDeal customers, on average take 44 days to purchase after their initial inquiry



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 **51 days to complete a purchase** after their initial inquiry.

*Based on 3,167 sales tracked in AutoDeal's Lead Management System from July 1 to September 30, 2019



2019 AUTODEAL AWARDS

NEW CAR SALES BY SEGMENT

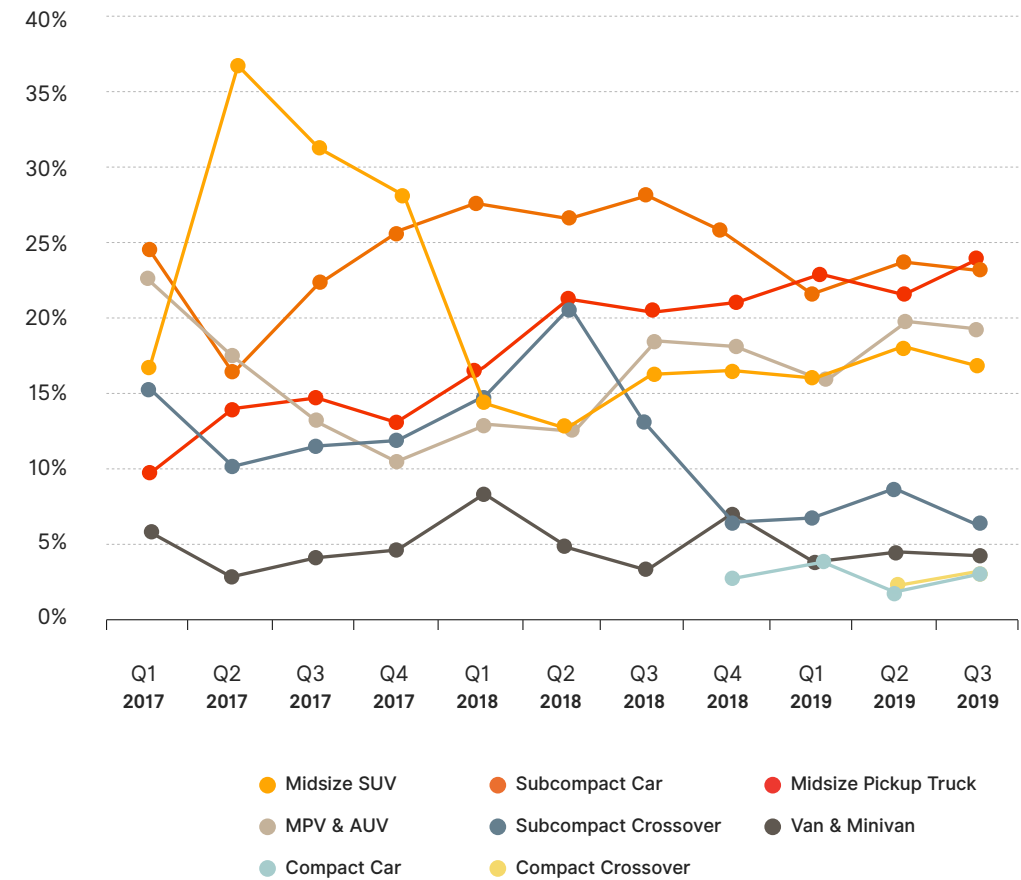
Transaction proportions of vehicles sold on AutoDeal.com.ph

Long Live the Pickup Truck

The pickup truck segment continues to remain popular with prospective car buyers in the Philippines. As customers continue to shop across multiple different vehicle segments, the pickup is becoming a serious purchase consideration as an alternative to SUVs, MPVs and subcompacts. This statement is supported by comprehensive data on online customer inquiries that will be made public in our annual insights report in 2020. What brands and dealers need to quickly come to terms with is, whether they like it or not, a large chunk of their line-up will always be in competition with a pickup.



% Proportion of AutoDeal Generated Sales Tracked



Note: This graph shows the breakdown of sales transactions recorded through the AutoDeal platform from 2017 to Q3 2019.

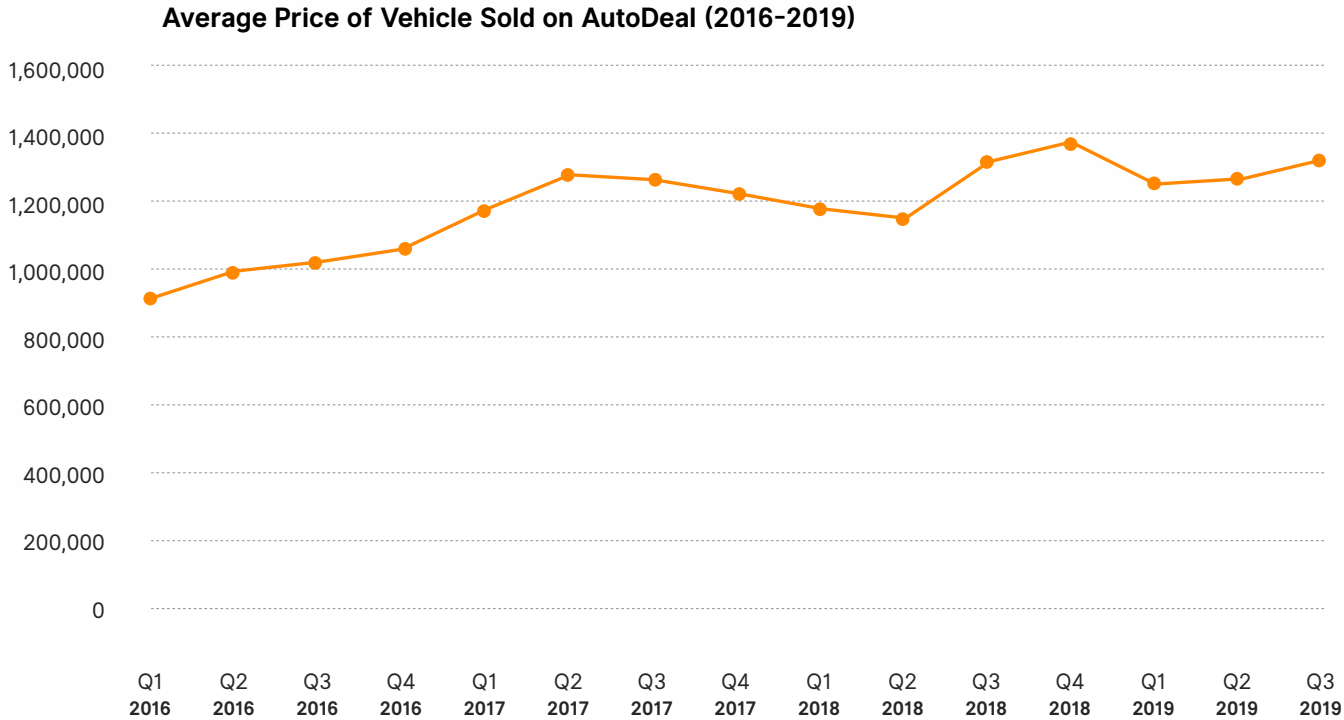
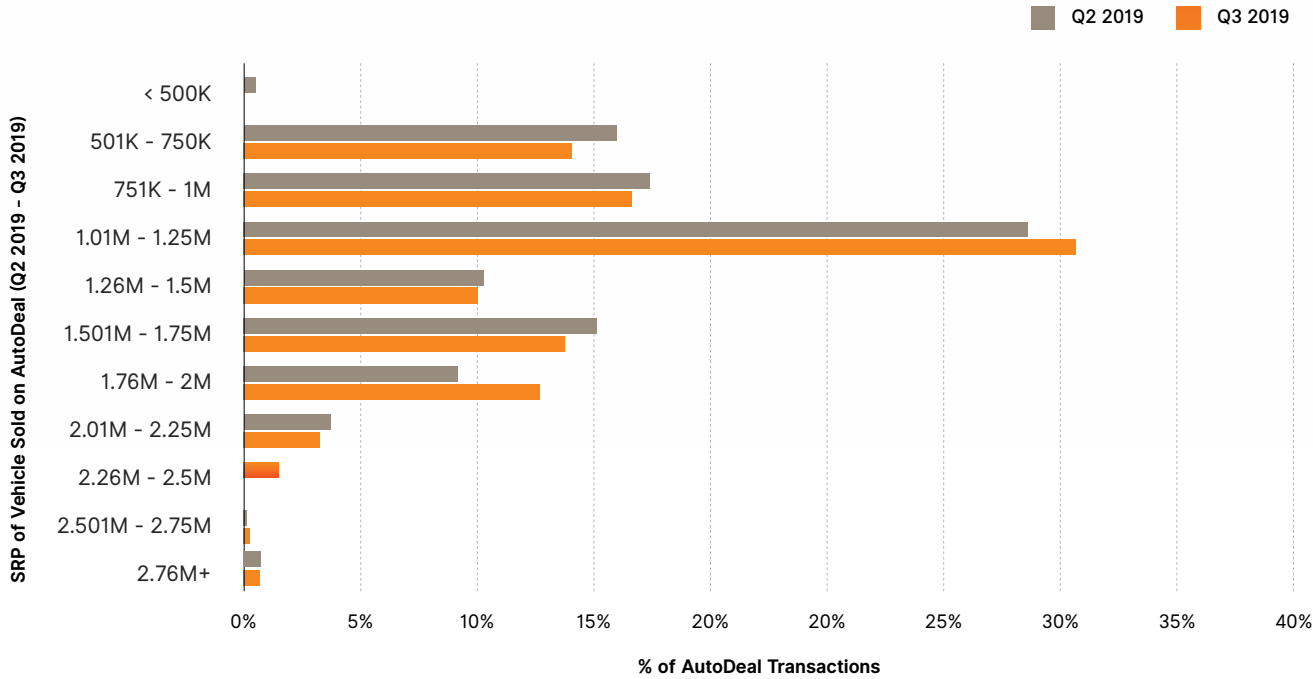


P1,312,069
Average Price of Vehicle Sold
on AutoDeal during Q3 2019

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

NEW CAR SALES BY SRP

In light of higher prices, consumer spends are increasing

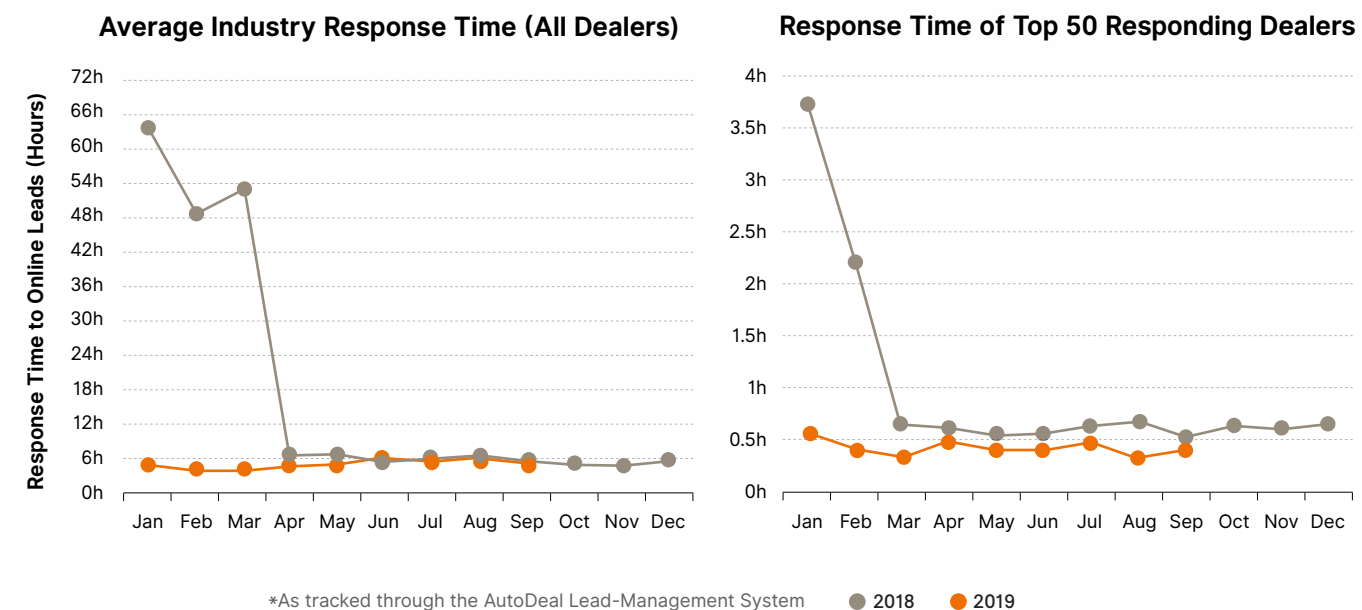


New Car Dealer

DEALER TALK

INDUSTRY RESPONSE TIME

AutoDeal continues to pioneer online customer service standards through

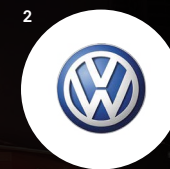


TOP 10

Fastest Responding Dealers
(Q3 2019)



FORD
Zamboanga
3 minutes



VOLKSWAGEN
Bonifacio Global City
7 minutes



FORD
Cagayan De Oro
7 minutes



NISSAN
Sumulong Highway
7 minutes



MAZDA
Greenhills
12 minutes



MAZDA
Cagayan De Oro
12 minutes



NISSAN
General Santos
13 minutes



VOLKSWAGEN
Iloilo
13 minutes



CHEVROLET
Iloilo
16 minutes








FORD
Balintawak
17 minutes






TOP DEALERS

In terms of Lead-to-Sales Conversion






July
2019

	NISSAN Palawan	50%		HYUNDAI Ilocos Norte	12.50%
	CHEVROLET Cainta	33.33%		CHEVROLET Makati	11.76%
	CHEVROLET Isabela	14.29%			

August
2019

	HYUNDAI Dumaguete	20%		FORD Dumaguete	10%
	HYUNDAI Ilocos Norte	16.67%		HYUNDAI Tacloban	10%
	NISSAN Bataan	15.29%			

September
2019






	CHEVROLET Batangas	14.29%		CHEVROLET CamSur	10%
	NISSAN Camsur	12.50%		CHEVROLET Tarlac	8%
	CHEVROLET Batangas	11.11%			

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






TOP SALES AGENTS

AutoDeal Agents with the best Lead-to-Sale conversion






July
2019

	Anthony Baula Commonwealth	40%		Lovelaine Solomon Calamba	12%
	Lyndelou Jocson Iloilo	25%		Jan Rimando Metro Baguio	12%
	Jorge Narte Iloilo	17%			

August
2019

	Pauline Joy Gomez Iloilo	100%		Ellane Novida General Santos	14%
	Arline Aguirre Batangas	25%		Regina de Ramos Cavite	13%
	Mark Jesus Anonuevo Marcos Hwy.	15%			

September
2019

	Sammy Siega Pasig	100%		Eunice Kaye Ravanera Cagayan De Oro	16%
	Czarina De Jesus Bataan	20%		Adam Purkis Cebu Central	16%
	KC David Marcos Hwy.	17%			

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

FIVE STARS

Here are some of our favorite buyer reviews of Q3 2019



MARION BANDIN

Toyota, Sta. Rosa



We would like to express our heartfelt thanks to Mr. Marion Bandin for the assistance that he provided us during our car purchase. As a customer lacking knowledge of a vehicle, he answered all our inquiries and explained it very well. We appreciate his effort in providing the best offer and deal to us. I will highly recommend him to my friends and colleagues. Thank you for the high level of customer service.

Rachelle Bogñalbal
purchased a Toyota Wigo 1.0 G AT



MARVIN ALBRANDO

Toyota, Mandaue South



To all possible buyers local and abroad i will highly recommend this dealership for having a very good agents specially Mr. Marvin Albarando. He helped me all the way with my application and approval and always response asap with your inquiries..he is the only agent who give attention to my application unlike the other dealership agents..Sir Marvin thank you so much for your help and efforts and time even its already your off duty..wish u more sales sir marvin and to the toyota mandaue south..FRM: CALGARY ALBERTA CANADA

Jaymar Quirol
purchased a Toyota Hilux 2.4 G DSL 4x2 AT



JOAN TUSING

Ford, Global City



Joann is a very accommodating and make sure that everything is ok before we proceed with the transactions. She is very patient with our concerns and queries. I'd recommend her to be your next sales agent when you visit Ford BGC :)

Ellen Mae Maraya
purchased a Ford EcoSport 1.5L Trend AT



PATRICK INOJALES

Hyundai, Commonwealth



Patrick was my agent. I strongly recommend him because was very diligent and assisted me all throughout the process. He carefully answers all my queries and gave advise as well. He would update me from time to time of the latest status until I got my car home. Even if I already did the purchase, he still reminds me of the next steps. Like for the car check up and other stuff on how I need to take care of my car. :)

Nheriza Lopez
purchased a Hyundai Kona 2.0 GLS AT



MEDELYN SON

Toyota, San Jose Del Monte, Bulacan



To Ms Medz and the TSJ Fam.. Noong una nag hesesitate ako mag apply considering na yung distance from your store/ company ay napakalayo sakin, but then It was a wonderful experience visiting your store and interacting with you. lalong lalo na kay Ms. medz.

Jay-Ar Tambologan
purchased a Toyota Vios 1.3 MT

FIND YOUR AUTODEAL CUSTOMER REVIEWS

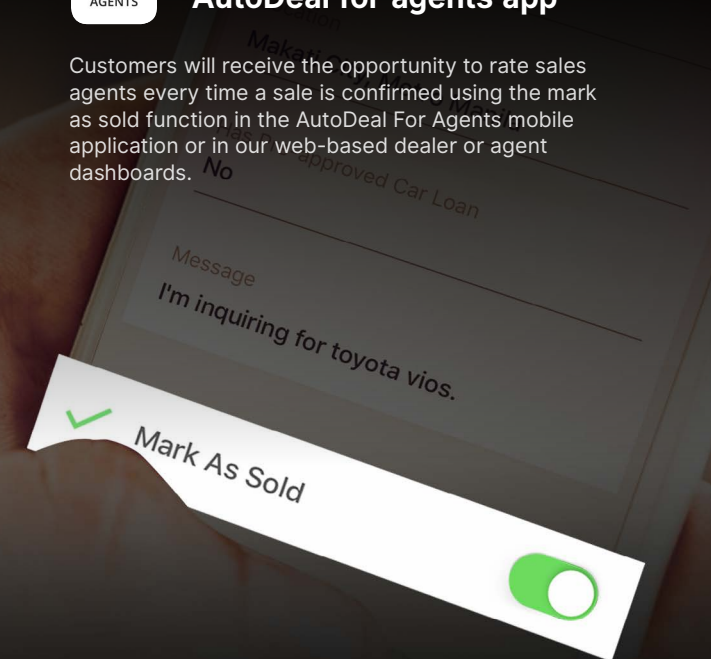
1. Log in to your AutoDeal Promoter Dashboard.
2. Click on the Sales Agents tab in the left sidebar menu.
3. Click on Reviews

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.





MOTODEAL



USED CAR
INSIGHTS

USED CAR DEALER INDUSTRY RESPONSE TIME

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

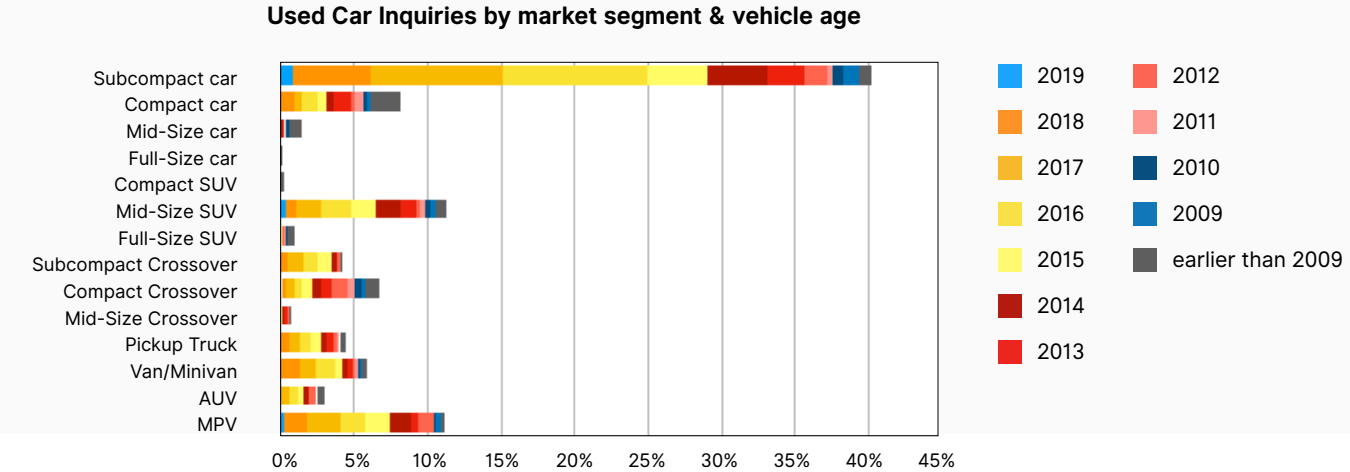
TOP 10 Fastest Responding Dealers (Q3 2019)

	Dealer	Response Time
1	Car Empire	0.41 hrs.
2	SamCars Trading Corp.	0.77 hrs.
3	All Cars Manila	2.71 hrs.
4	J.A. Tan Car Trading	2.74 hrs.
5	RL Cars	3.15 hrs.
6	Gozun Cars	3.38 hrs.
7	Toyota Certified Balintawak	3.79 hrs.
8	Toyota Certified Alabang	5.26 hrs.
9	PSBank Pre-Owned Auto Mart	6.54 hrs.
10	Auto Boutique	9.02 hrs.

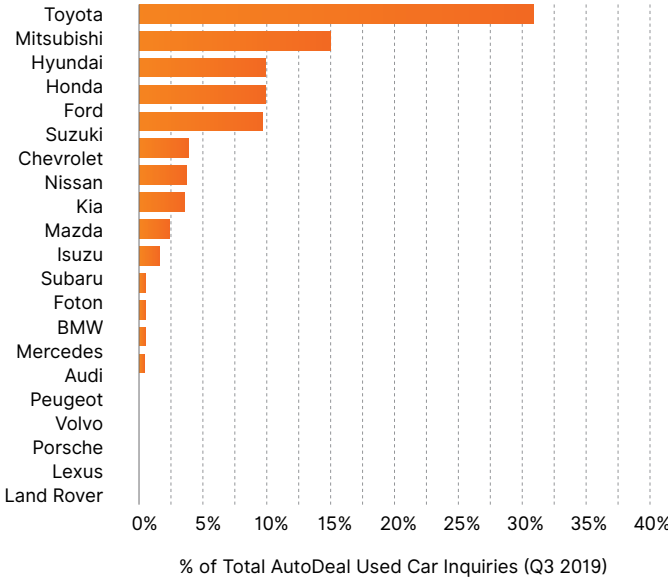
USED CARS IN DEMAND

What kind of vehicles are used car buyers looking for?

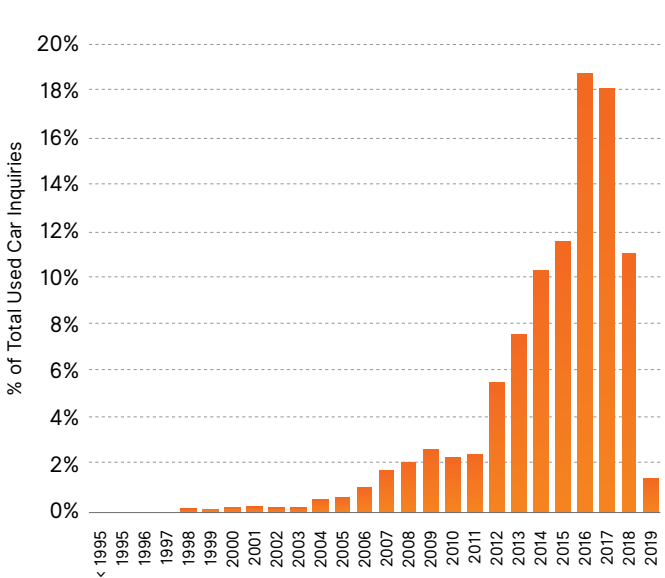
Note: As tracked through the AutoDeal Lead Management System



Most Inquired for Used Car Brands



Most Inquired for Model Years

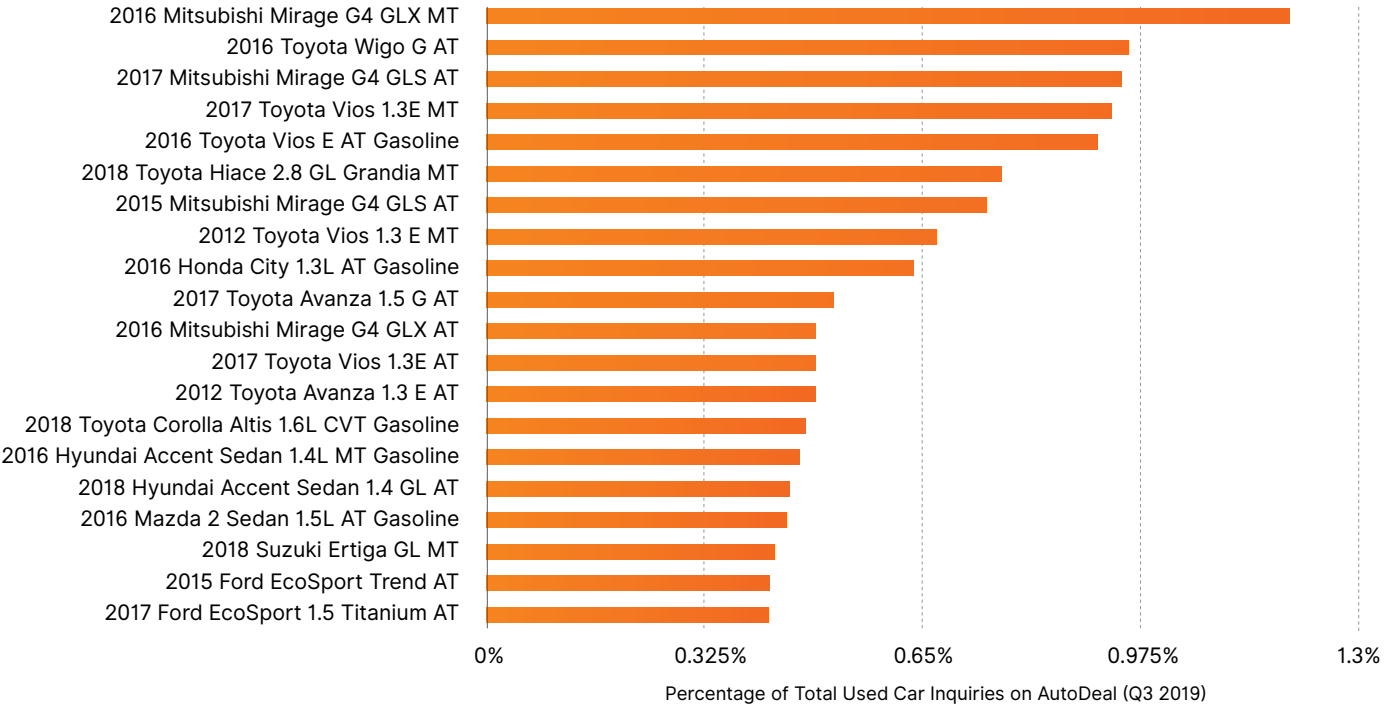


USED CARS IN DEMAND

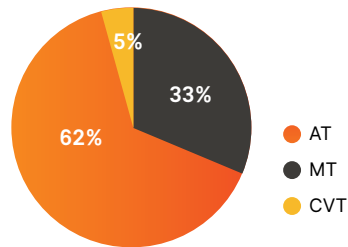
What kind of vehicles are used car buyers looking for?

Note: As tracked through the AutoDeal Lead-Management System

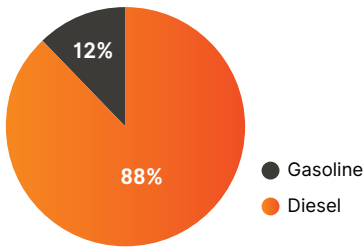
Most Inquired for Used Cars on AutoDeal (Q3 2019)



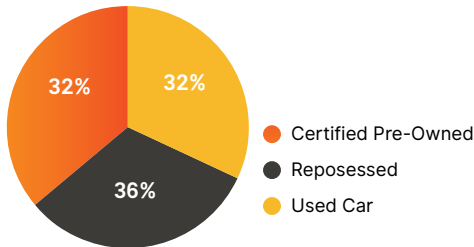
Most Inquired for Used Cars by Transmission Type



Most Inquired for Used Cars by Fuel Type



Most Inquired for Used Cars by Used Car Classification



INSIDE
AUTODEAL



AUTODEAL PROFILE

We are the no.1 automotive marketplace in the Philippines

	Total Visits	Unique Visits	Bounce Rate
JULY 2019	2,337,327	1,249,903	12.94%
AUGUST 2019	2,335,985	1,222,907	10.43%
SEPTEMBER 2019	2,065,820	1,089,661	10.78%
TOTAL	6,739,132	3,562,471	11.38%

We're multi-platform



562K

Facebook Likes



12K

Instagram Followers



3.4K

Twitter Followers



108K

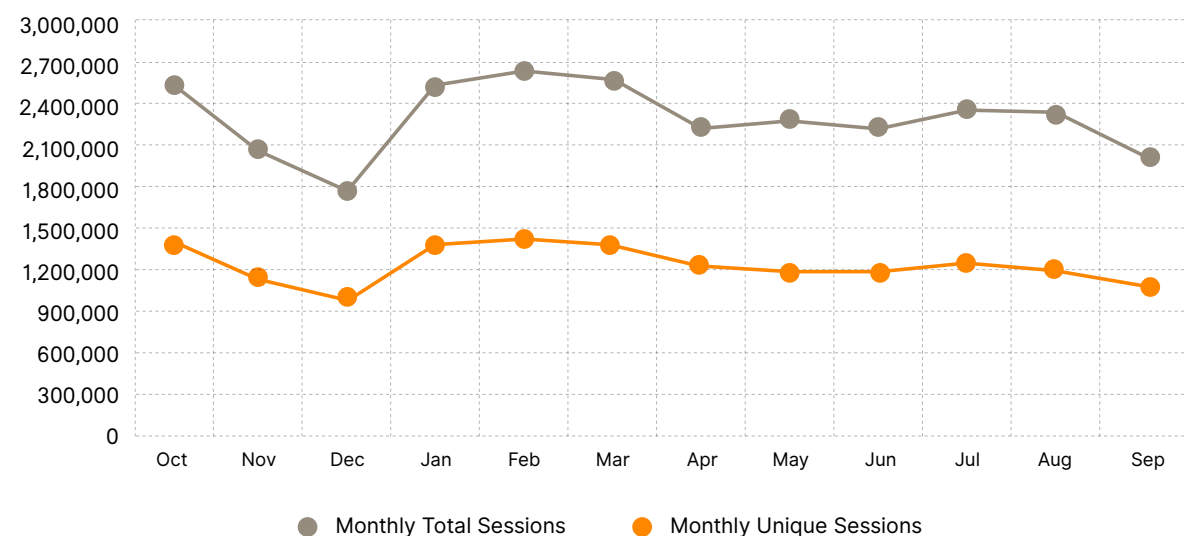
YouTube Subscribers



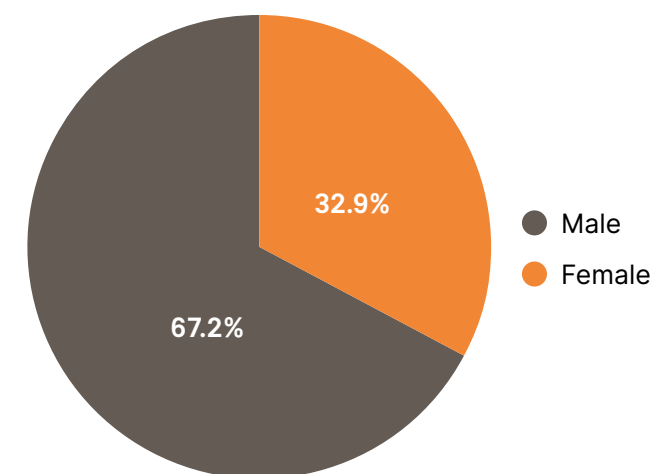
200K

E-mail Subscribers

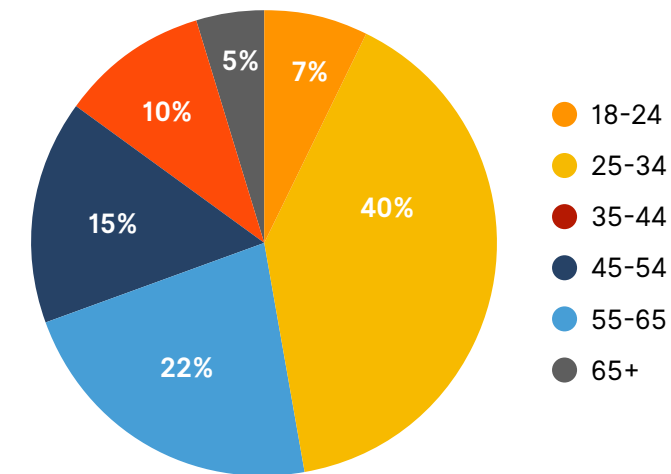
AutoDeal.com.ph Web Traffic (2018-2019)



GENDER



AGE RANGE



TOP 5

Most Read Reviews of Q3 2019

Note: Click the images to read reviews.

1 2019 HONDA BRIO REVIEW

[Full Review](#) | Published July 12, 2019

16,568 Views 100 Social Shares 3:55 Average Read Time



2 2019 MITSUBISHI STRADA

Published May 23, 2019

9,995 Views 73 Social Shares 3:39 Average Read Time



3 2019 KIA FORTE

Published August 30, 2019

7,754 Views 29 Social Shares 3:01 Average Read Time



4 2019 SUBARU FORESTER

Published August 9, 2019

5,364 Views 36 Social Shares 3:56 Average Read Time



5 2019 HYUNDAI SANTA FE

Published September 27, 2019

3,261 Views 26 Social Shares 3:55 Average Read Time



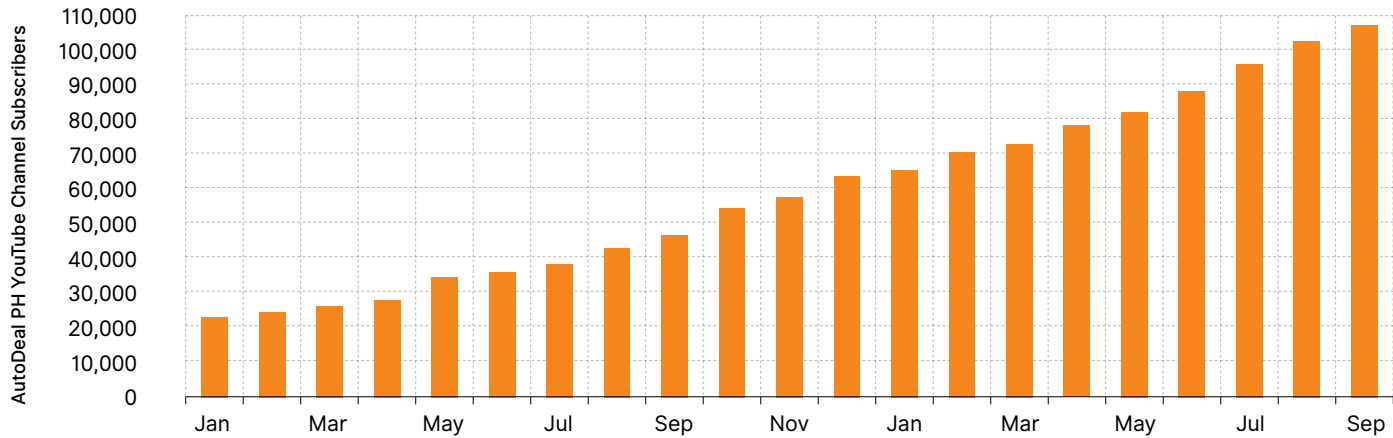
AUTODEAL VIDEO

Now the no.1 automotive YouTube channel in the Philippines

Note: Data as of October 11, 2019

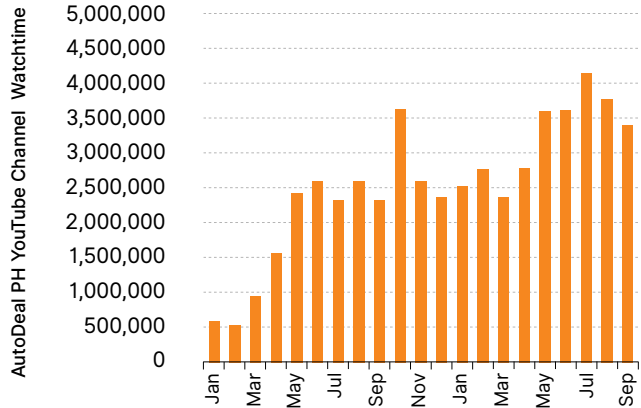
AutoDeal YouTube Subscribers

108,932
Total subscribers



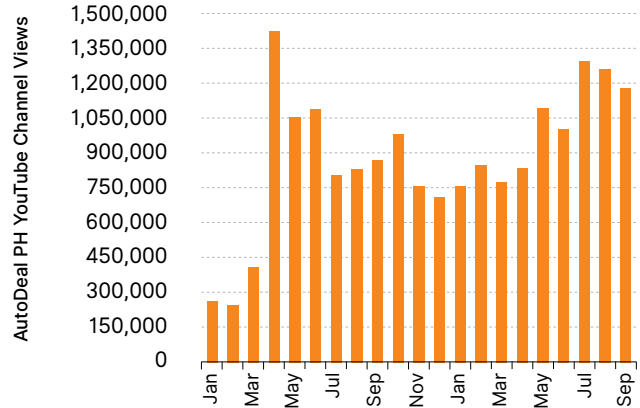
AutoDeal YouTube Monthly Watchtime

57,323,466
Total minutes of watchtime



AutoDeal YouTube Monthly Views

21,188,765
Total video views



TOP 5

Most Viewed Videos of Q3 2019

1

HONDA BRIO RS CVT BLACK TOP

Behind The Wheel | Published July 16, 2019

152,446

Views

1,511

Likes

329

Comments



2

5 THINGS IN THE NEW 2020 FORD EVEREST

Face-off | Published August 9, 2019

140,529


Views

1,429

Likes

174

Comments



3

2020 MAZDA3

First Look | Published August 15, 2019

125,099


Views

521

Likes

119

Comments



4

2019 FORD EXPEDITION 3.5 LIMITED MAX 4WD

Behind The Wheel | Published August 16, 2019

123,844


Views

2,085

Likes

317

Comments



5

2019 TOYOTA VIOS 1.3 XE

Behind The Wheel | Published July 12, 2019

82,436


Views

969

Likes

251

Comments



Note: Data is reflected from AutoDeal YouTube channel as of October 1, 2019.





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