



Key Q1 2017 highlights

01

Automotive queries grew 4% YoY on Search and 9% on YouTube

Mobile queries show the fastest growth.

Two leading categories in terms of growth - Aftersales and Car financing.

Interest towards new cars grew 6%.

Interest towards mass segment grew 14% YoY, while premium showed slight decline

Hyundai outperformed Toyota on Google search in Q1.Mercedes-Benz is the leader in premium segment, but this quarter it dropped the most -9% YoY. Land Rover showed the highest growth +9% YoY.

02

03

Automotive on YouTube is huge, but Brands do not lead this conversation yet

Over 300M organic views of automotive videos occured on YouTube in Q1 2017 in Russia, but only 7% of this views were of the videos produced by the Brands.

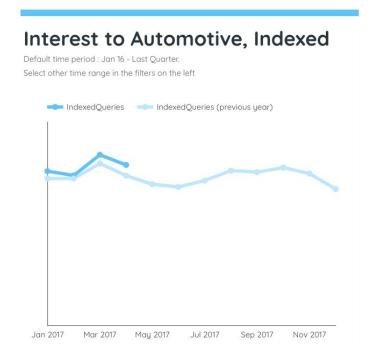
SUV segment still attracts the highest number of views in category.

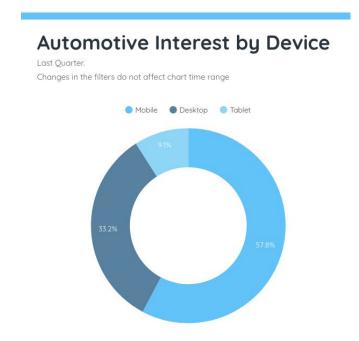




CATEGORY TRENDS & KEY AUCTION METRICS

Total automotive search queries increased by 4% YoY in Q1 2017 driven by mobile growth with 24%

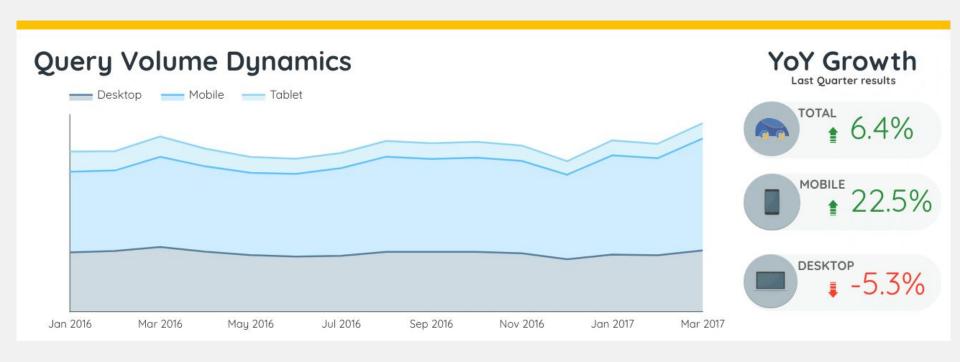






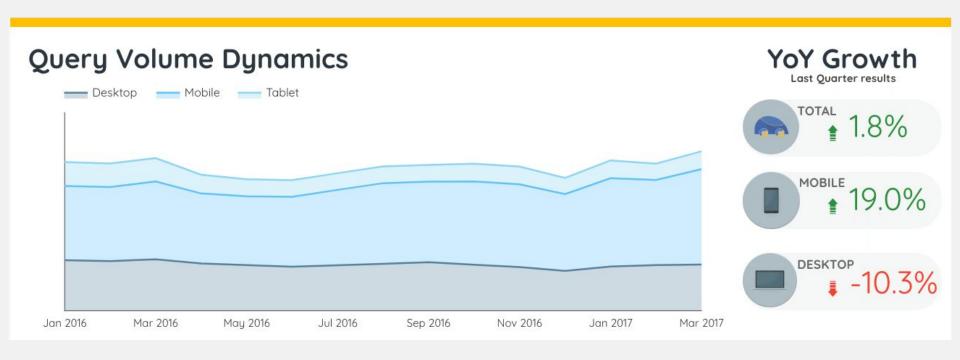
I Interest towards New cars grew 7% YoY in Q1 2017 6 out of 10 queries came from mobile with 22.5% growth rate

NEW CARS



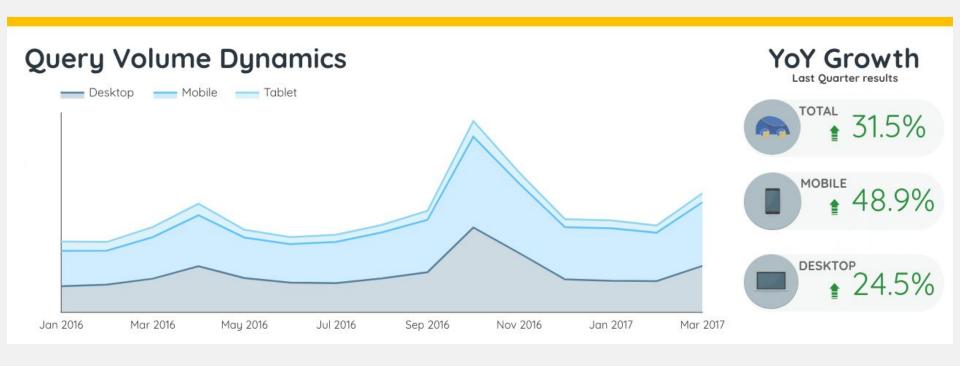
I Used cars queries were relatively stable in Q1 2017, interest is migrating from desktop to mobile

USED CARS



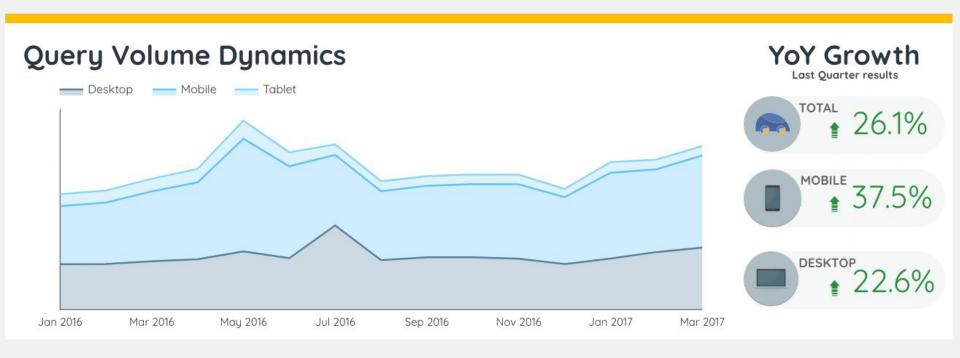
Aftersales was the fastest YoY growing category in Q1 2017 with 31.5% growth rate due to the high interest towards tire change

AFTERSALES



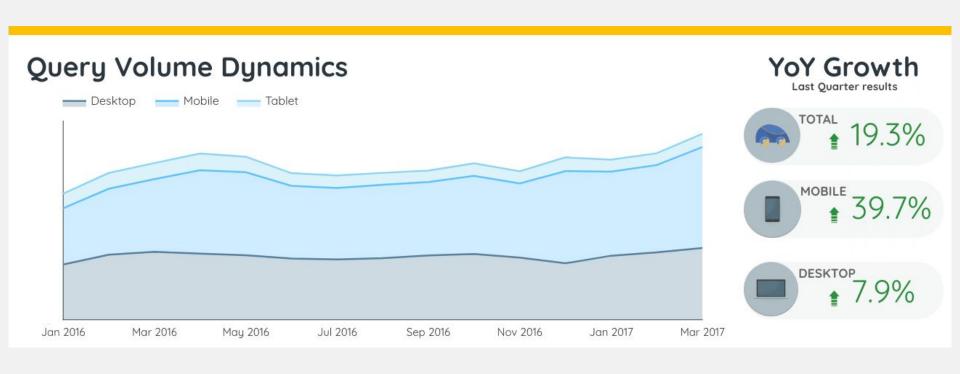
I Car financing category grew 26% YoY in Q1 2017, while mobile queries grew 37%

CAR FINANCING



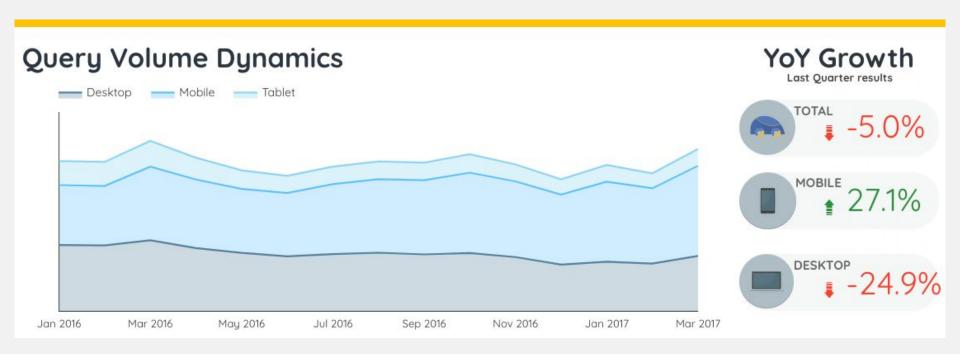
Trade-in Category had the highest Desktop query share of 40% in Q1 2017 but mobile queries were growing 5 times faster

TRADE-IN



Overall interest towards Generic terms in automotive category dropped -5% YoY in Q1 2017 despite mobile queries growth in 27%

GENERIC TERMS

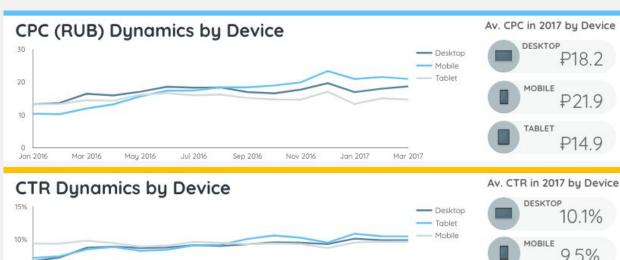


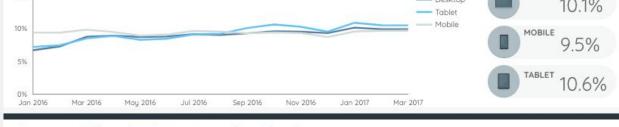
Mobile is playing significant role in automotive category

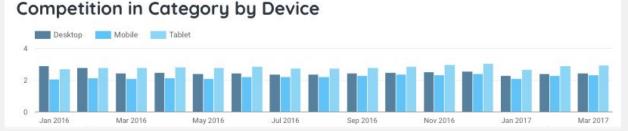
58%

of queries in Automotive
Category come from
mobile devices but
competition (avg. # of
advertisers per query)
is higher on desktops and
tablets

TOTAL







I Overall competition in automotive industry slightly decreased in Q1 2017, while CTR went up 17% YoY

TOTAL







I New cars category showed light improvement in CTR in Q1 2017

NEW CARS







I Used cars category had highest competition increase in Q1 2017 as well as average CTR and CPC growth YoY

USED CARS





I Generic terms category had lowest average CPC, but highest average CTR in Q1 2017

GENERIC TERMS





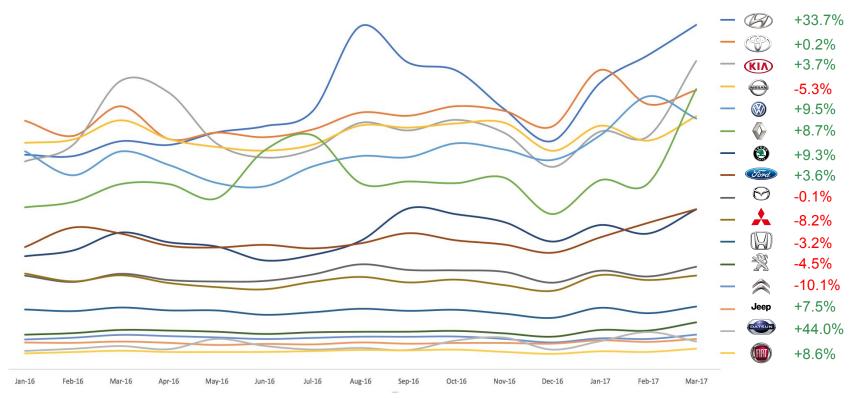




BRAND LEADERBOARD ON GOOGLE SEARCH

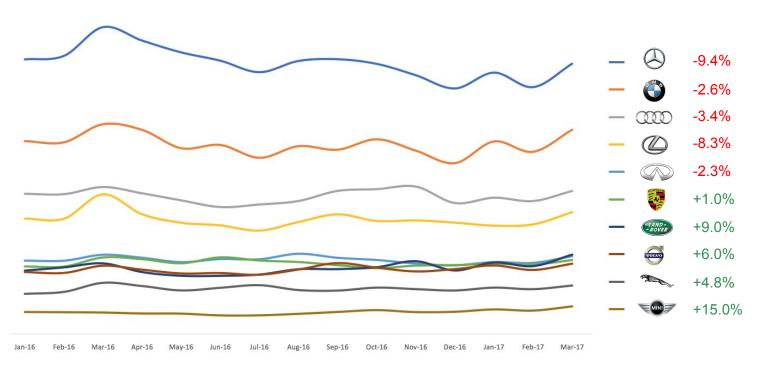
I Hyundai gained leadership in mass segment in Q1 2017 by overcoming Toyota in January Hyundai showed 34% YoY growth rate compared to 14% overall segment increase

Monthly dynamics of branded queries in Mass segment, 2016 - 2017



I Interest towards Premium brands declined by 1% YoY in Q1 2017 Highest growth showed Mini & Land Rover +15% & 9%YoY respectively, lowest growth Mercedes -9% YoY

Monthly dynamics of branded queries in Premium segment, 2016 - 2017



Source: Internal Google Data

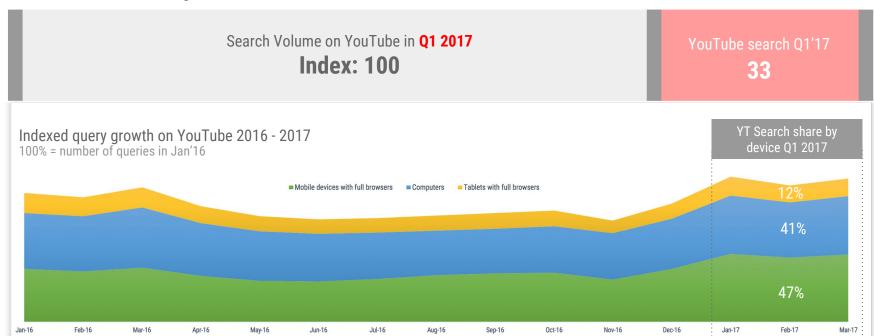


AUTOMOTIVE TRENDS ON YOUTUBE

I YouTube search in Automotive equals ⅓ of Google search

Mobile queries dominate - 47% of Automotive YT searches in Q1 2017 appeared on mobile

Automotive search volume growth on YouTube





Q1 2017 overview

335M

organic views of automotive content in Q1 2017

+33% yoy



I Toyota is leading the mass segment on YouTube search

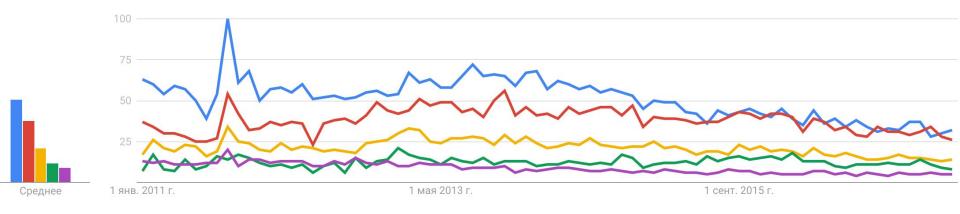


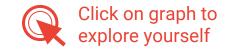




I In Q4 BMW outperformed Mercedes-Benz on YouTube search



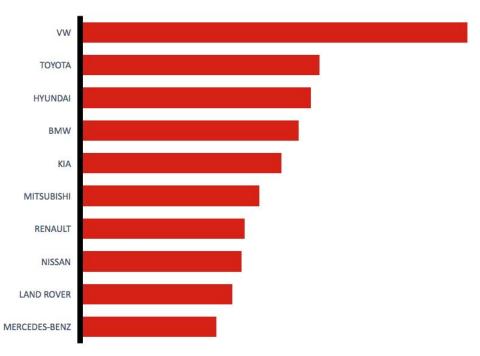






I VW, Toyota and Hyundai are leading by number of views on YouTube in Russia in Q1 2017

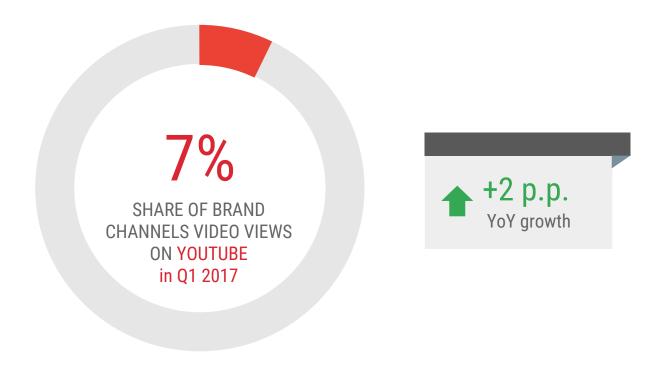
Top 10 automotive brands by views on YouTube, Q1 2017 Blogger, User, and Brand generated content, Organic & Paid views







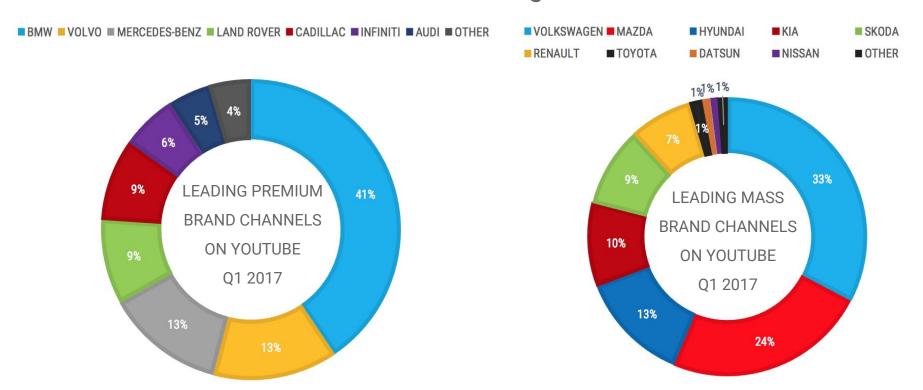
I But brands do not own this conversation - non-brand generated content dominates the share of voice on YouTube by ratio of 14 to 1







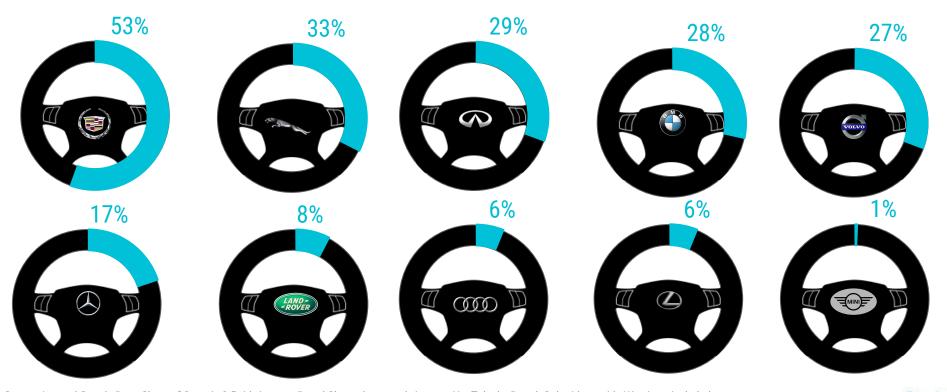
I BMW channel is leading premium segment in terms of views on YouTube, while VW is the leader among mass brands





I Cadillac, Infiniti, and Volvo have highest share of brand generated content among all brand-related video views in Q1 2017

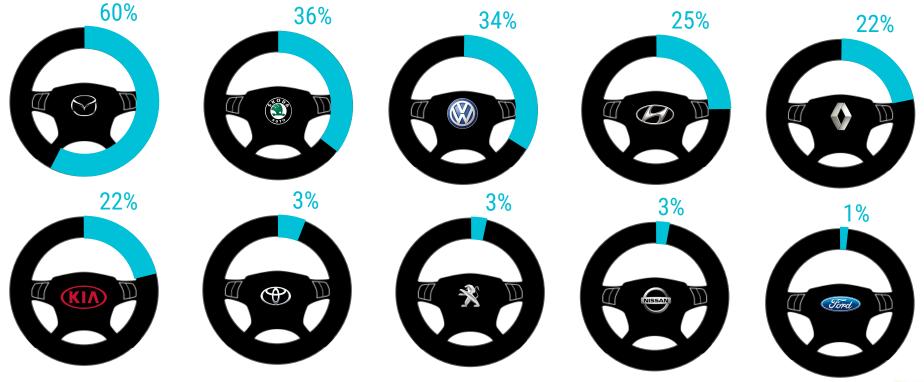
Share of Owned media on YouTube by Brand in premium auto category, Q1 2017





I Mazda, Skoda and Volkswagen have highest share of brand-generated content among mass brands in Q1 2017

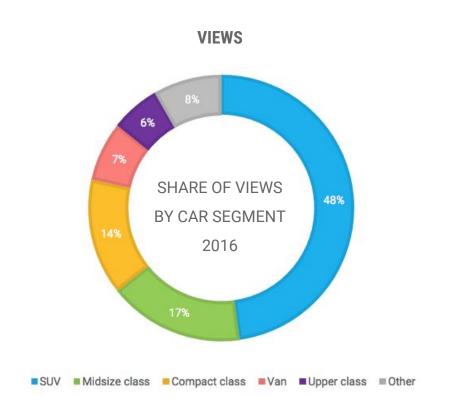
Share of Owned media on YouTube by Brand in auto mass category, Q1 2017

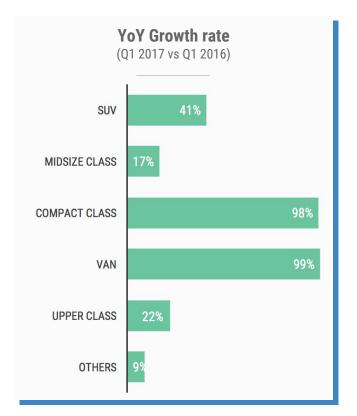






I Audience is still highly interested in SUV - half of automotive views account to this category





Source: Internal Google Data

THANK YOU!



For feedback and questions please reach out to Google Auto team auto-ru@google.com