

# AUTO INDUSTRY

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# 2016 YEAR IN REVIEW

**RUSSIA**

Google Trends and Insights



Auto@Google

# | Key 2016 highlights

## 01

Automotive interest grew by 8% on Search and 15% on YouTube

After Sales and Generic terms show the highest growth rates.

Interest towards new cars shows spikes at major model launches

Interest towards premium segment grew 6% YoY, while Mass remained almost stable

Toyota is the leader on Google and YouTube search. Hyundai outperformed it during Creta launch. In premium segment Mercedes-Benz is leading in both search and Youtube, but BMW grew significantly on YouTube search in Q4

## 02

## 03

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

Over 10 Billion views of automotive videos occurred on YouTube in 2016 in Russia, but only 10% of this views were of the videos produced by the Brands. The leaders in people's interest are BMW, Toyota and Mercedes-Benz

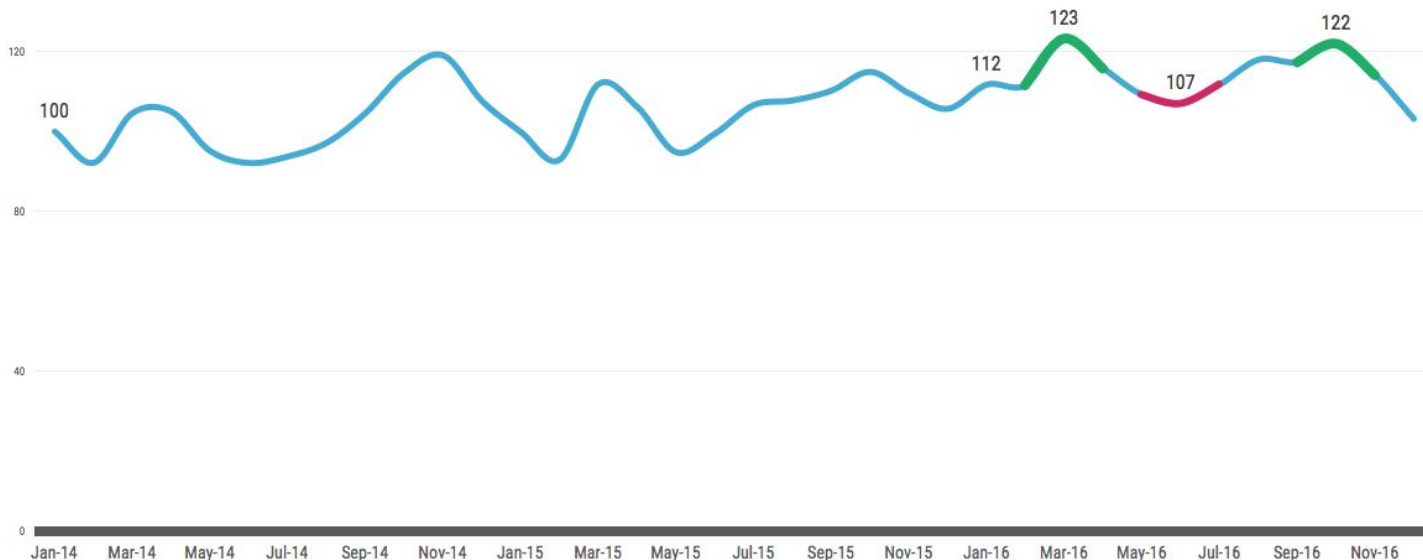
# **1. CATEGORY TRENDS & KEY AUCTION METRICS**

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# Automotive search queries increased by 8% YoY in 2016

## Automotive category query volume, Indexed

January 2014 - December 2016



### Key highlights

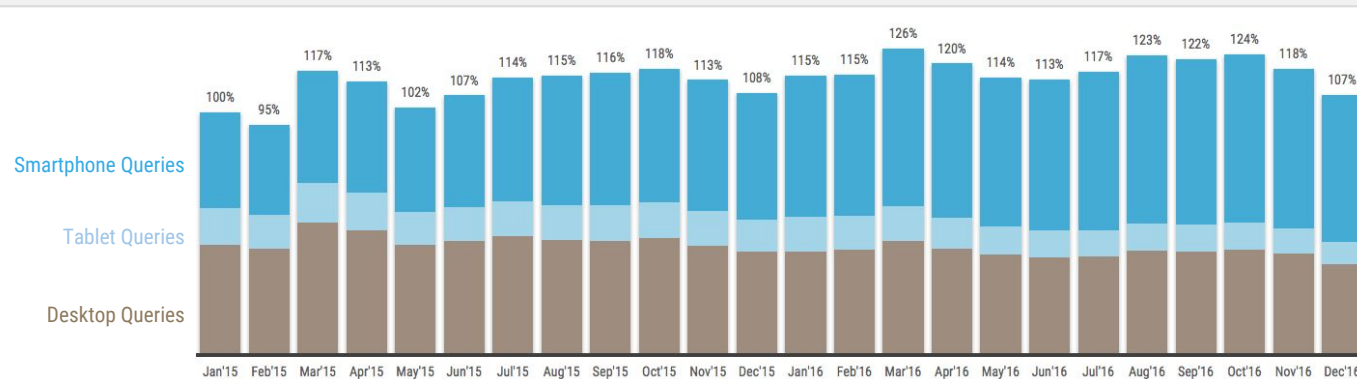
**8%** YoY growth

**Highest months:**  
March, October

**Lowest month:**  
June

| Interest towards New cars grew 7% in 2016  
56% of queries occurred on Mobile - up 32% compared to 2015

## NEW CARS



### YoY growth

Total

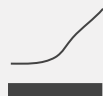
+7%

Desktop

-10%

Mobile

+32%



TOP  
RISERS



Рено  
Каптюр



Хёндэ  
Крета



Genesis  
g90



Tesla  
model 3



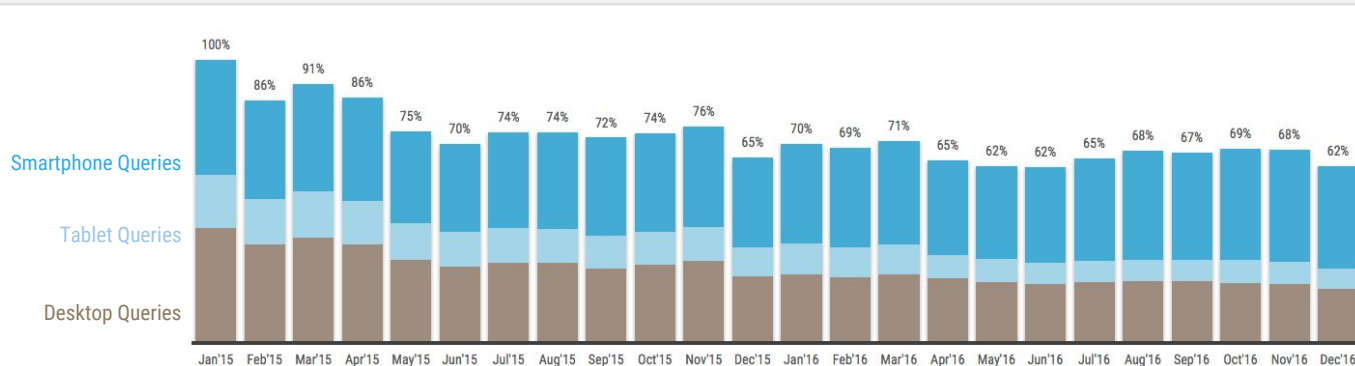
Отзывы лада  
веста



крузак

Interest in used cars was relatively stable through the whole year. Compared to 2015 query volume declined by 16% presumably because of direct traffic to the used cars portals caused by their advertising activity

## USED CARS



### YoY growth

Total

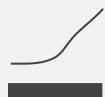
**-16%**

Desktop

**-28%**

Mobile

**+4%**



TOP  
RISERS

drom.ru

carprice .ru

Проверка  
авто

Авто ру  
москва бу  
купить

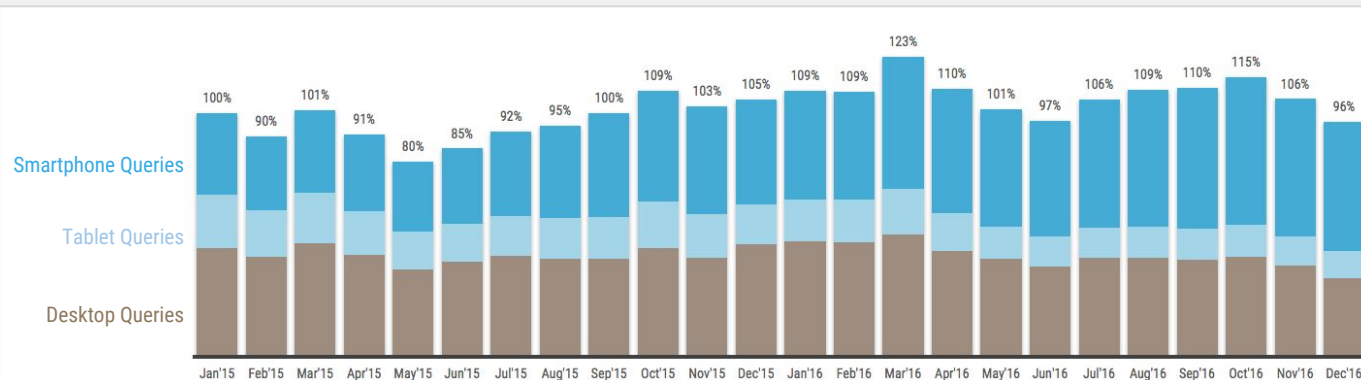
Что нужно знать  
при выборе  
автомобиля бу

Опель астра j

| Generic terms are on a rise in automotive - up 12% YoY. Growth mainly comes from Mobile

## GENERIC TERMS

INDEXED  
QUERY  
VOLUME



YoY growth

Total

**+12%**

Desktop

**-1%**

Mobile

**+44%**

TOP  
RISERS

Внедорожник  
4 4

Летающая  
машина

Кроссоверы  
2016

Russian  
car

Техно  
новинки  
автопрома

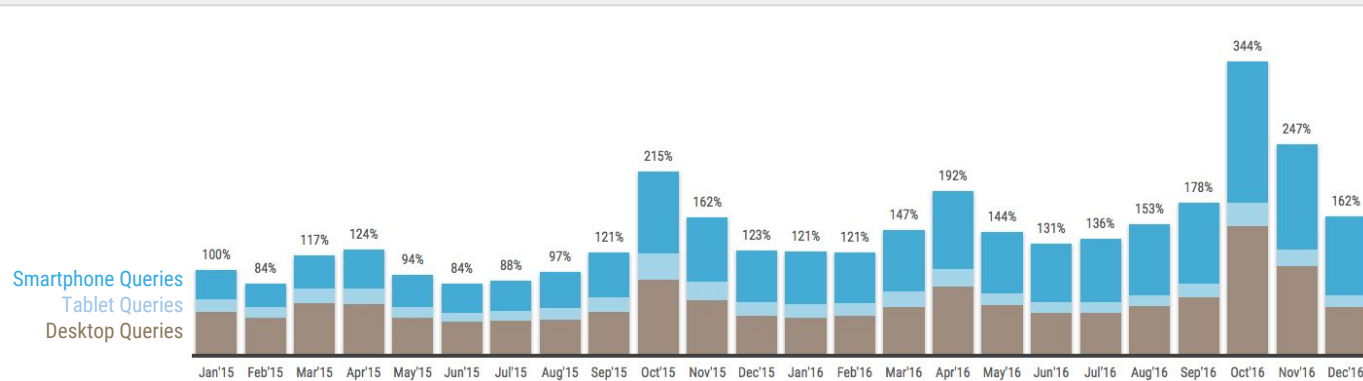
Джипы по  
грязи

Новинки  
авто 2017

| Interest towards after sales is growing 40% YoY. "Tyre change near me" grew 15x in 2016 showing that auto owners highly value the convenience of service location

## AFTERSALES

INDEXED  
QUERY  
VOLUME



YoY growth

Total

**+40%**

Desktop

**+7%**

Mobile

**+82%**

TOP  
RISERS

Шиномонтаж  
рядом

Замена  
салонного  
фильтра

Авто  
доктор

Авто то

Замена  
ремня  
генератора

Тюнинг  
русских  
машин



## Mobile is playing significant role in automotive

More than a half of automotive queries came from Mobile in 2016 while Auction was more competitive on Desktop



**36%** (-8% YoY)

of auto queries came from desktop in 2016



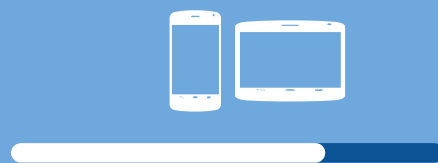
**2.5**

advertisers per query



**18RUB**

average CPC



**64%** (+21% YoY)

of auto queries came from mobile&tabs in 2016



**2.3**

advertisers per query



**17RUB**

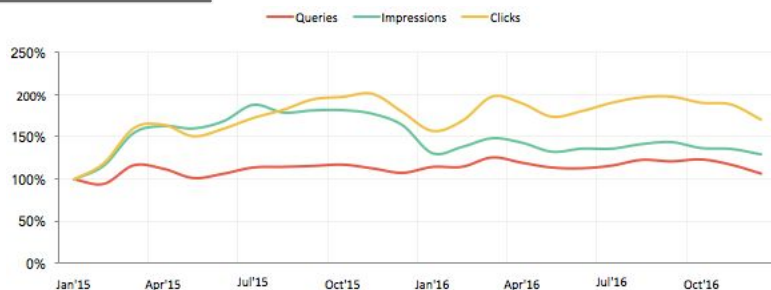
average CPC

Ad depths in new car segment was stable in Q4 while CPC has grown to 25 Rub  
In Used car segment clicks are still on a rise while number of ads was relatively stable

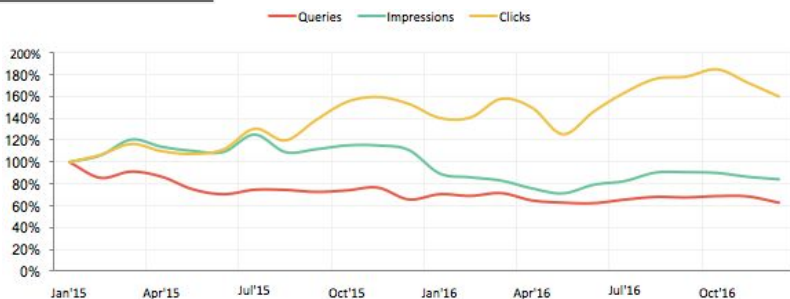
### Key industry metrics growth in 2015-2016

100% = number of queries (impressions, clicks) in Jan'15

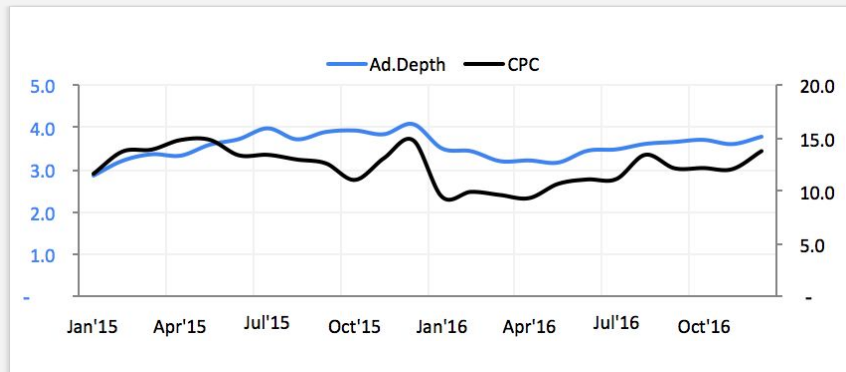
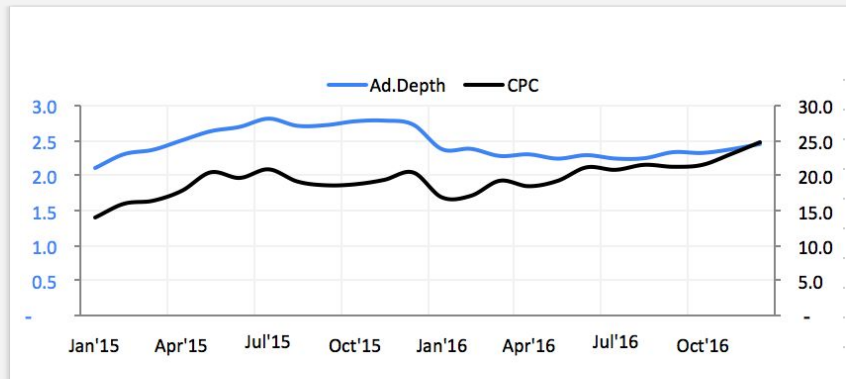
#### New cars



#### Used cars



### Average number of advertisers (Ad Depth) and Cost per click (RUR)

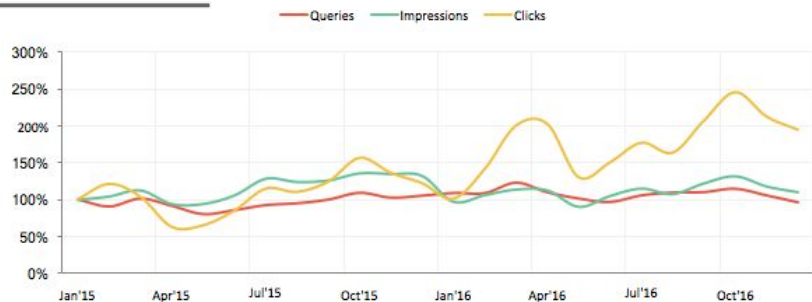


In generic and aftersales categories we see rise in clicks in November, while CPC even went down during this period

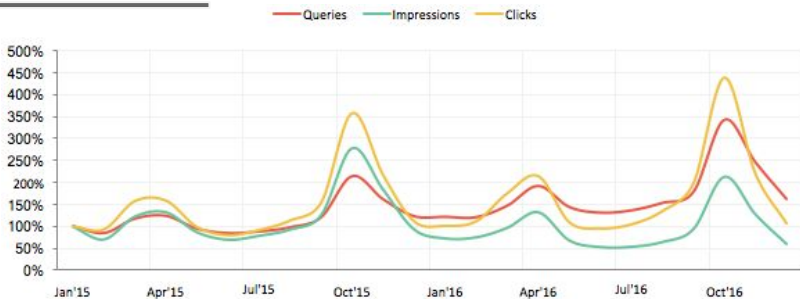
### Key industry metrics growth in 2015-Q3'16

100% = number of queries (impressions, clicks) in Jan'15

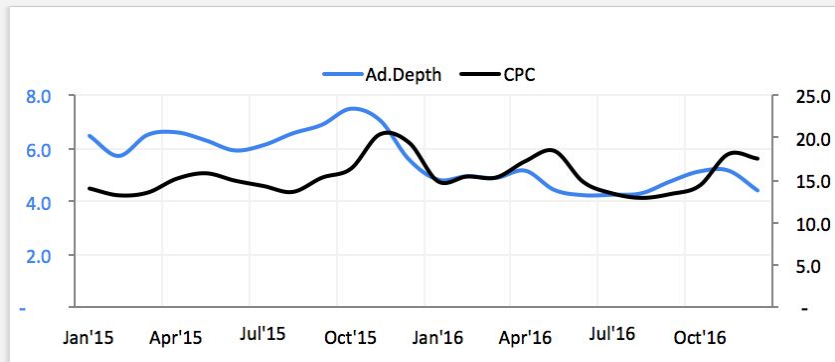
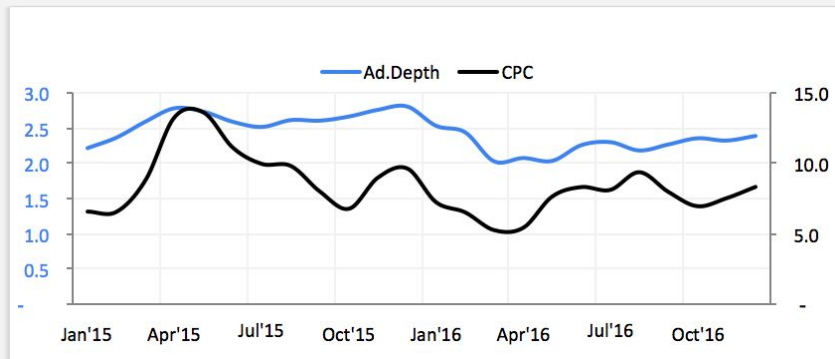
#### Generics



#### Aftersales



### Average number of advertisers (Ad. Depth) and Cost per click (in RUR)

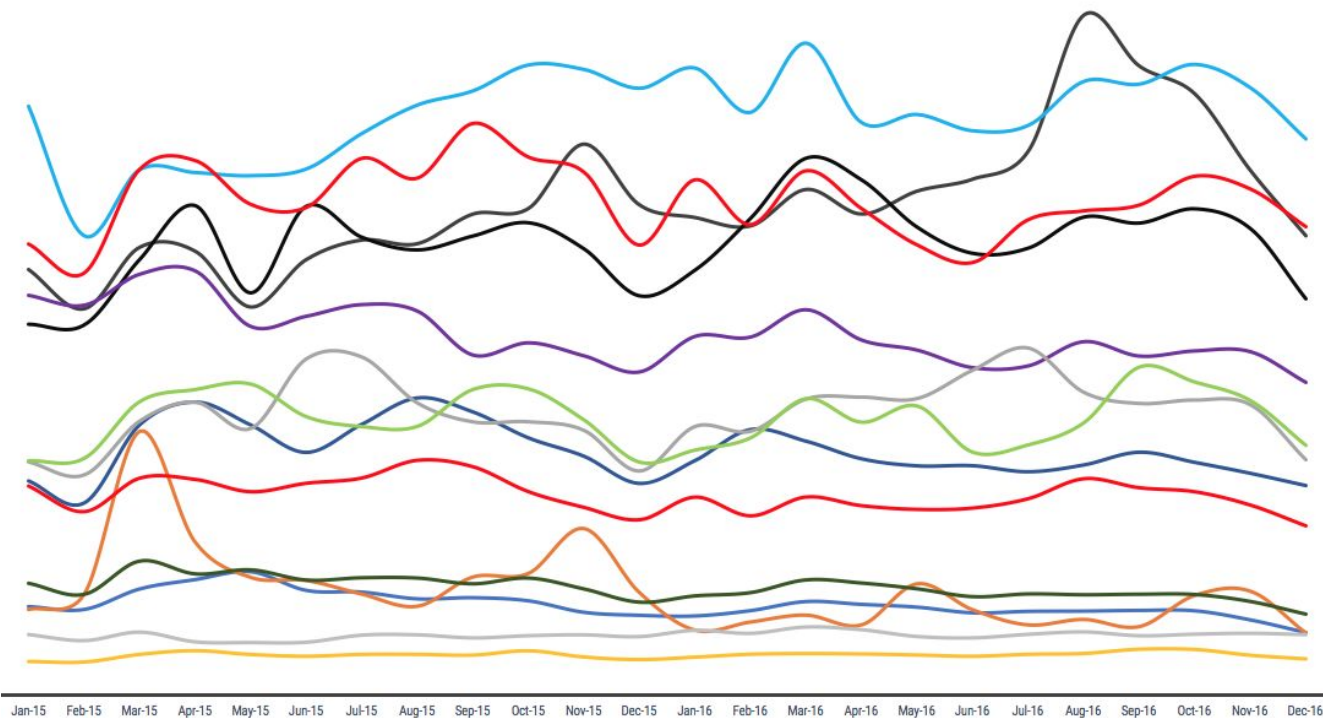


## **2. BRAND LEADERBOARD ON GOOGLE SEARCH**

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# | Toyota led the mass segment during the whole year, except August-September when Hyundai outperformed Toyota powered by Creta launch

Monthly dynamics of branded queries in Mass segment,  
2015 - 2016



## Key YoY highlights

**1%** YoY

growth of mass brand queries

## Best performers:

Hyundai	+18%
Jeep	+7%
Kia	+7%
Renault	+7%

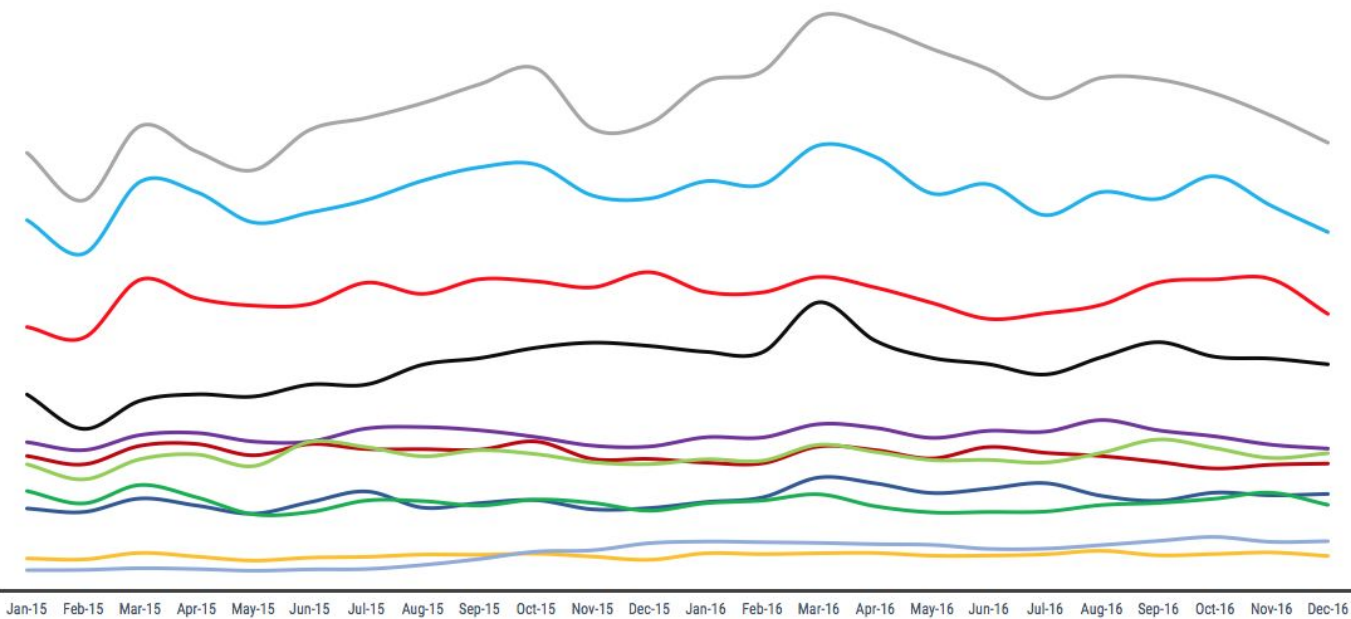
## Lowest performers:

Datsun	-37%
Citroen	-16%
Peugeot	-12%



# | Interest towards Premium brands grew 6% YoY. Mercedes-Benz and BMW still lead the peloton, while MINI demonstrates the highest growth rate

Monthly dynamics of branded queries in Premium segment,  
2015 - 2016



## Key YoY highlights

**6%** YoY  
growth of premium  
brand queries

### Best performers:

MINI **+73%**  
Jaguar **+15%**  
Lexus **+13%**  
Mercedes **+11%**

### Lowest performer:

Porsche **-5%**



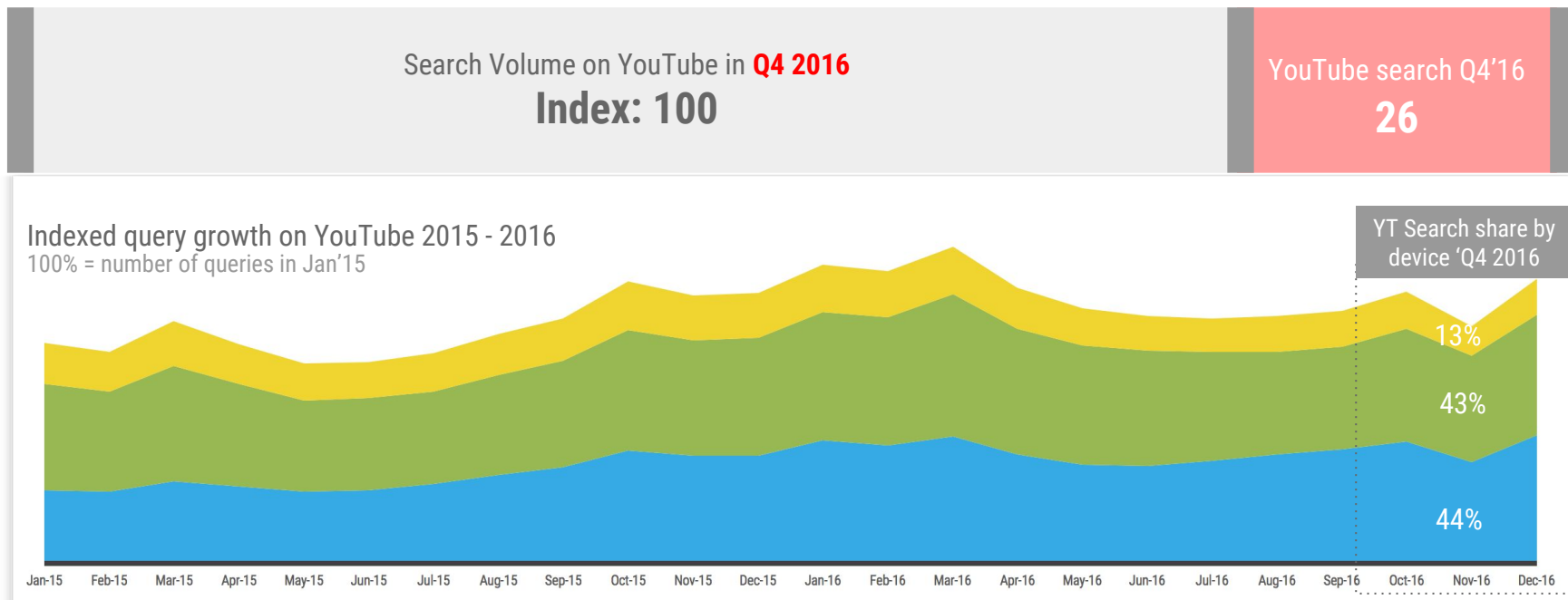
### **3. AUTOMOTIVE TRENDS ON YOUTUBE**

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# | For every 4 automotive queries on Google search there is one on YouTube

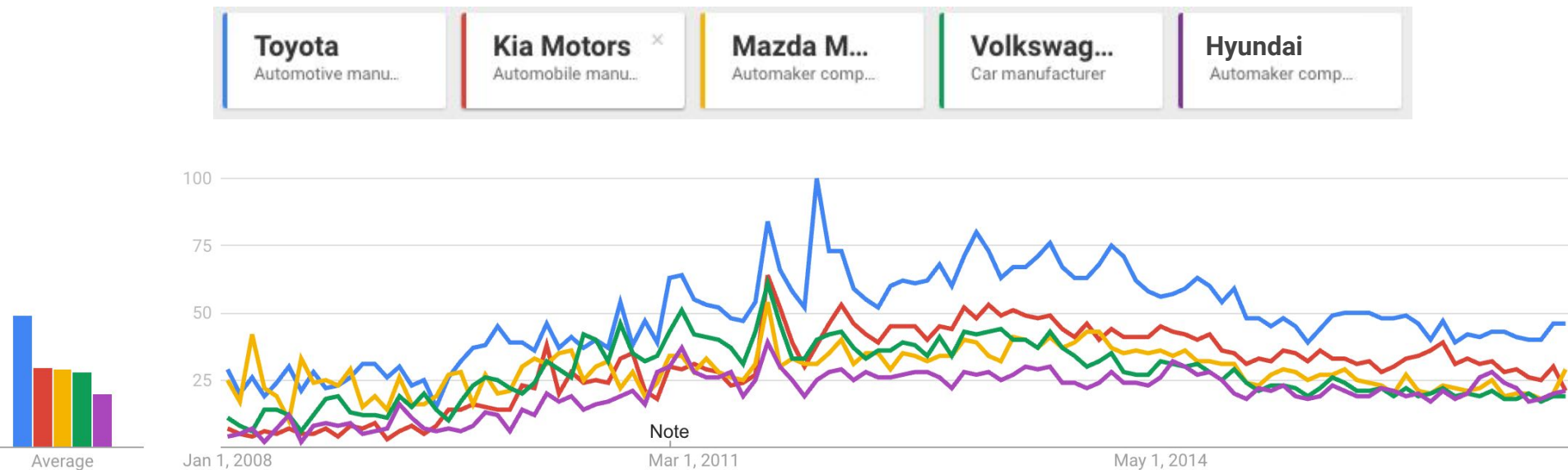
Mobile plays significant role - 44% of Automotive YT searches in Q4 appeared on mobile

Automotive search volume growth on YouTube



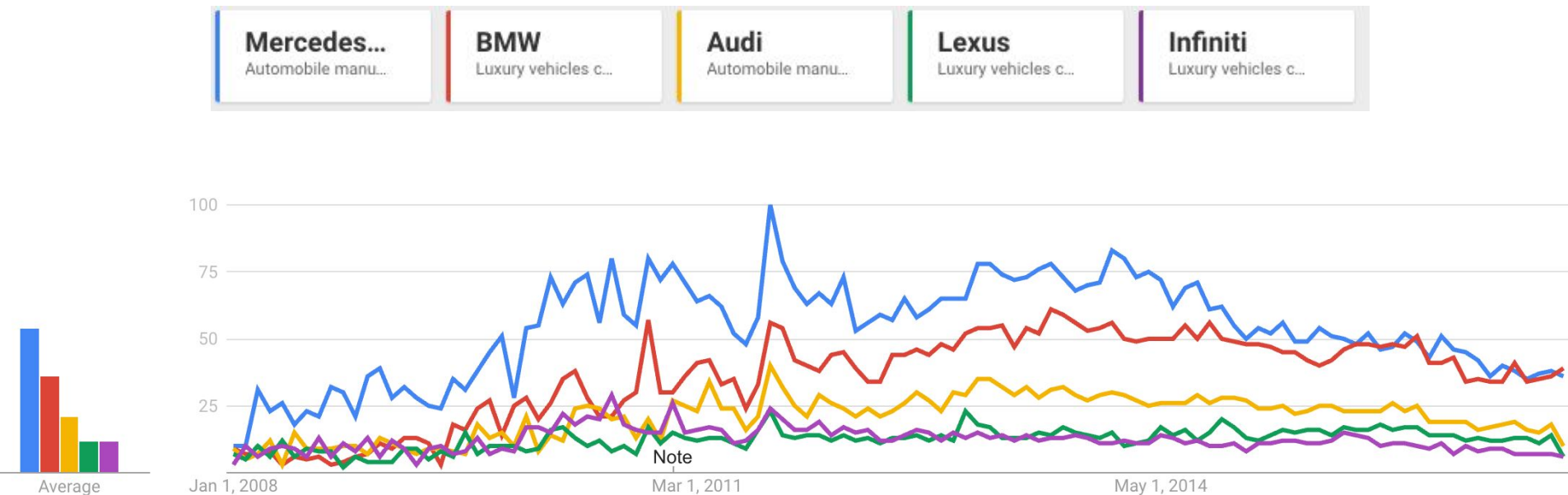


# | Toyota is leading the mass segment on YouTube search



Click on graph to  
explore yourself

# | In Q4 BMW outperformed Mercedes-Benz on YouTube search



Click on graph to  
explore yourself

# Overall Automotive category on YouTube in Russia is huge!

Russia, 2016



**10 Billion**  
Views



**14 000+ years**  
Of watch time



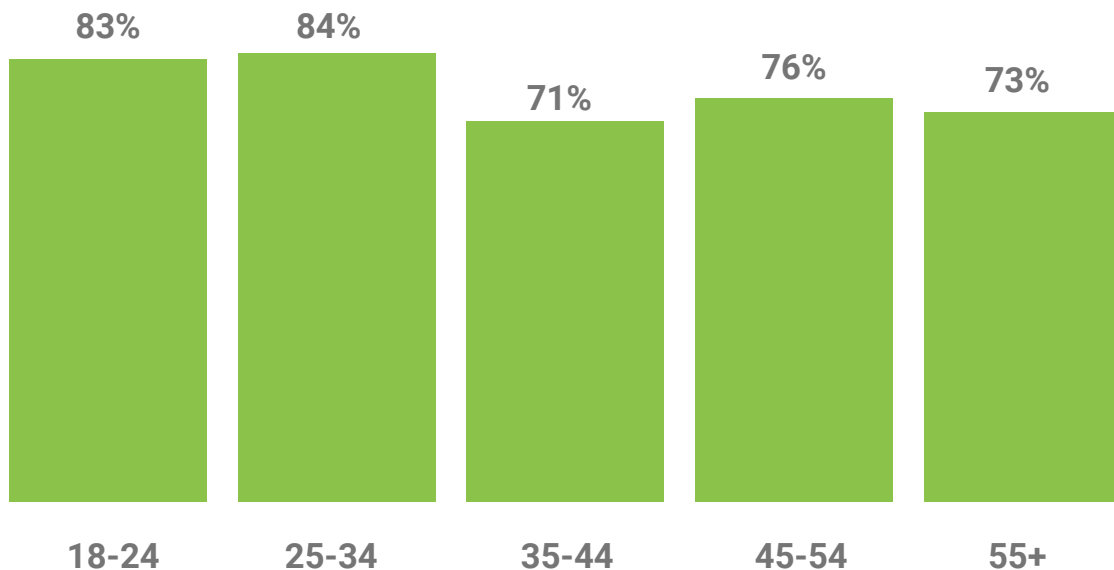
**20 Millions**  
Likes

Source:

Note: Engagement is the sum of likes, dislikes or comments for any given video

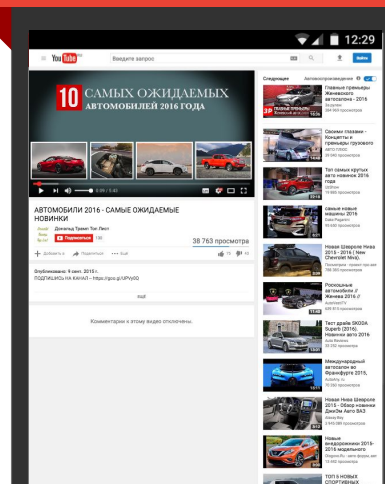
# I YouTube is one of **the top places** where new car buyers of all ages go to research for a new car

Share of car buyers who **watched online video** to inform a recent new car purchase by age, 2016



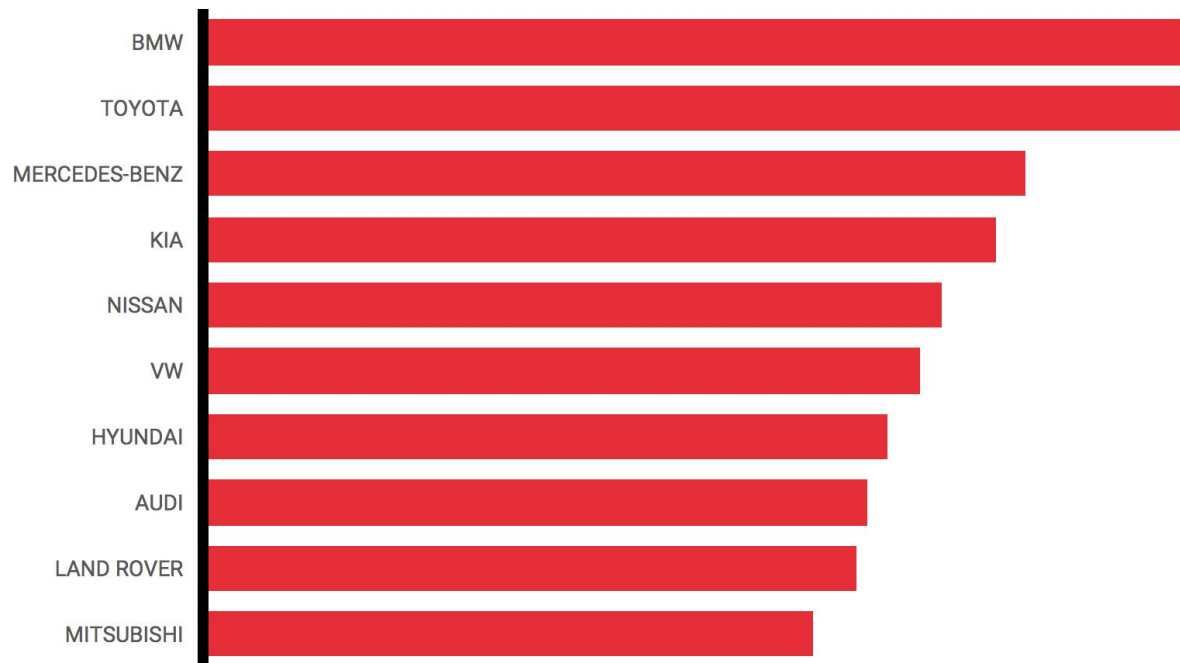
Base: New car buyers, Source: Automotive path to purchase study, Russia, 2016

Youtube is **#1 destination** for car buyers to watch online video



# | BMW, Toyota and Mercedes-Benz got the highest number of views this year

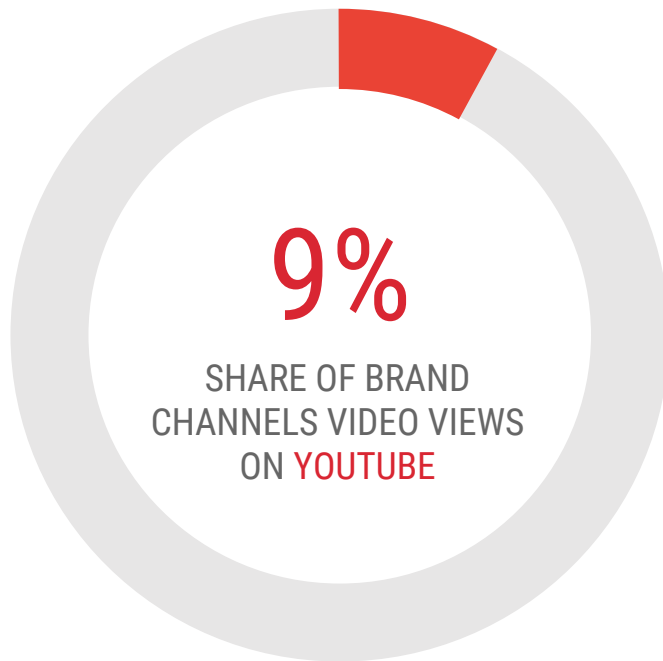
Top 10 automotive brands by views on YouTube, 2016  
Blogger, User, and Brand generated content, Organic & Paid views



Source: Internal Google Data

\*Earned media is any video that is hosted on a YouTube channel not owned or managed by auto brand. Owned Media - all views on YouTube channels owned by an automotive brand.

| But brands do not own this conversation - non-brand generated content dominates the share of voice on YouTube by ratio of 9 to 1

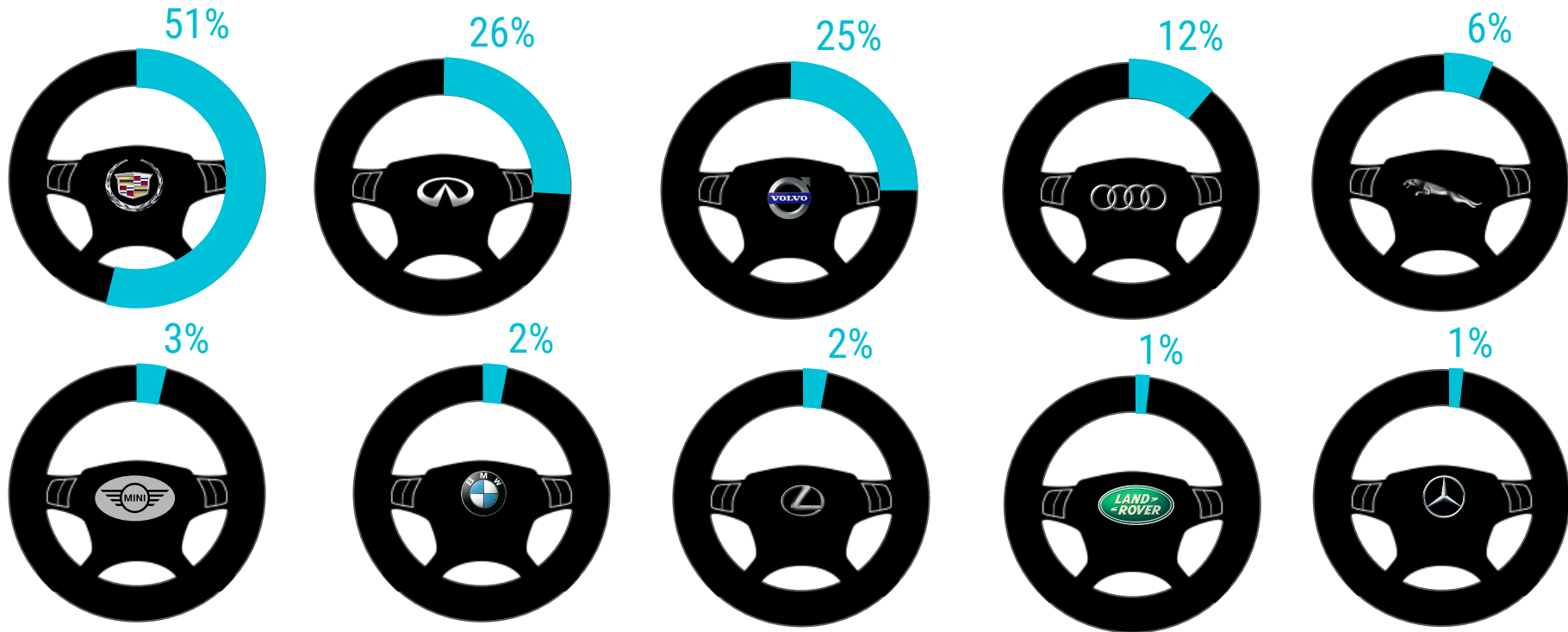


Source: Internal Google Data

\*Earned media is any video that is hosted on a YouTube channel not owned or managed by auto brand. Owned Media - all views on YouTube channels owned by an automotive brand.

# Cadillac, Infiniti, and Volvo have highest share of brand generated content among all brand-related video views in 2016

Share of Owned media on YouTube by Brand in premium auto category, 2016

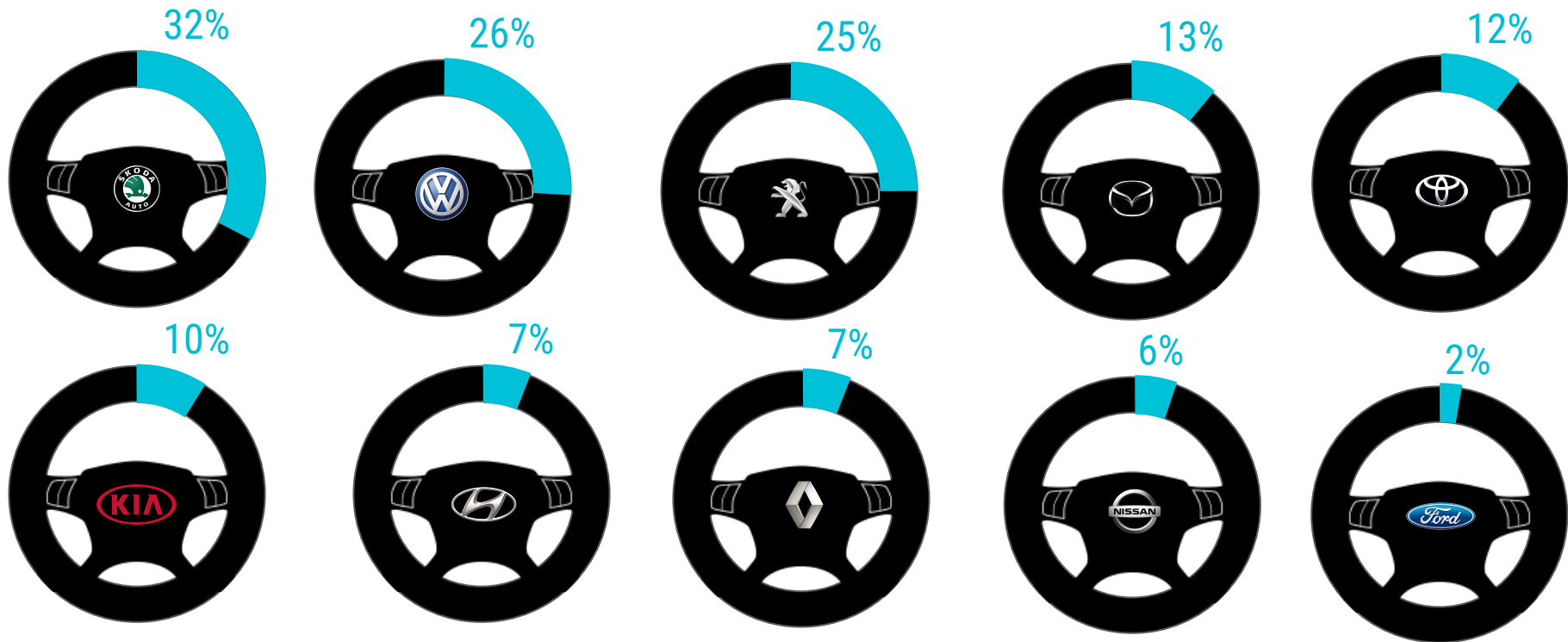


Source: Internal Google Data, Organic & Paid views. Only videos with 1K+ views included

\*Earned media is any video that is hosted on a YouTube channel not owned or managed by auto brand. Owned Media - all views on YouTube channels owned by an automotive brand.

# | Skoda, Volkswagen, and Peugeot have highest share of brand-generated content among mass brands in 2016

Share of Owned media on YouTube by Brand in auto lux category, 2016

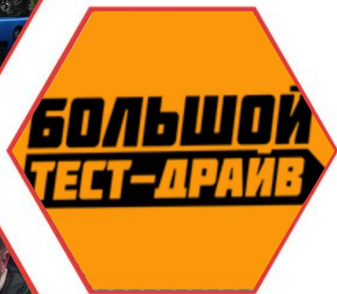


Source: Internal Google Data, Organic & Paid views. Only videos with 1K+ views included

\*Earned media is any video that is hosted on a YouTube channel not owned or managed by auto brand. Owned Media - all views on YouTube channels owned by an automotive brand.



# Big Automotive Influencers on YouTube in 2016



## AcademeG

Leader in number of views, new subscribers and watch time

## Большой тест-драйв

Leader in Average view duration, BT's videos were viewed 1.5x longer than average in auto category

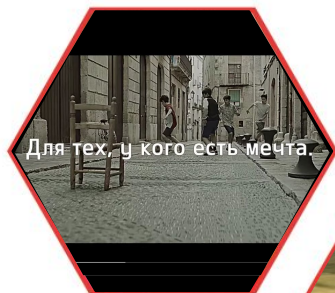
## Anton Avtoman -

Attracted the highest amount of views about SUV segment

## Жизнь Сибиряка

Created the most viral automotive video this year. Having just 6K subscribers his video received 300K views without promotion

# Top Branded Videos on YouTube in 2016



Для тех, у кого есть мечта

**Для ребенка, у которого есть мечта - #KiaOMBC**

**Channel: KIA Motors Russia**

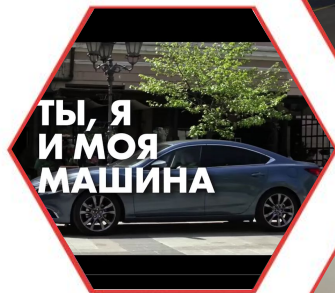
Leader in number of views



**BMW 100 лет**

**Channel: BMW Russia**

Got highest number of likes in 2016



ТЫ, Я  
И МОЯ  
МАШИНА

**ТЫ, Я И МОЯ МАШИНА — «ВСЁ СЛОЖНО» (1/5).**

**Channel: themazdarussia**

The most shared video in 2016

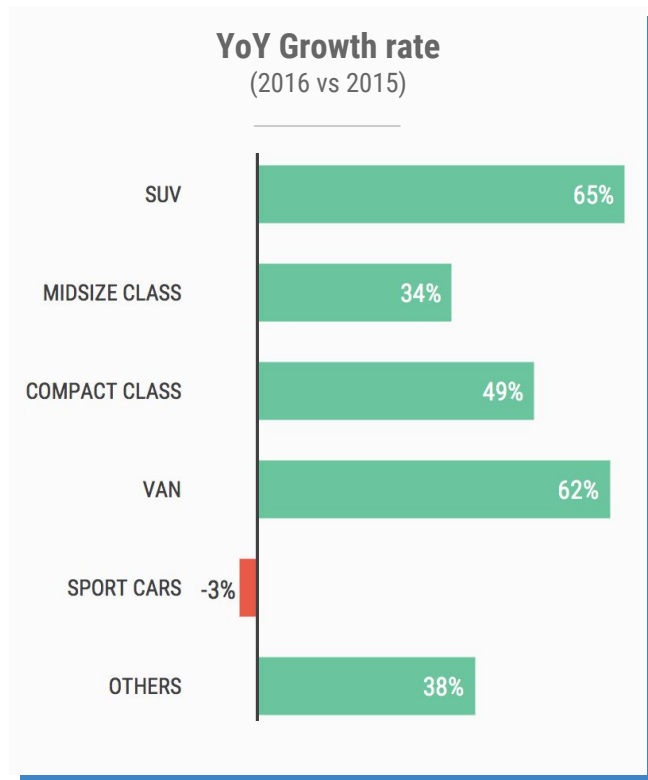
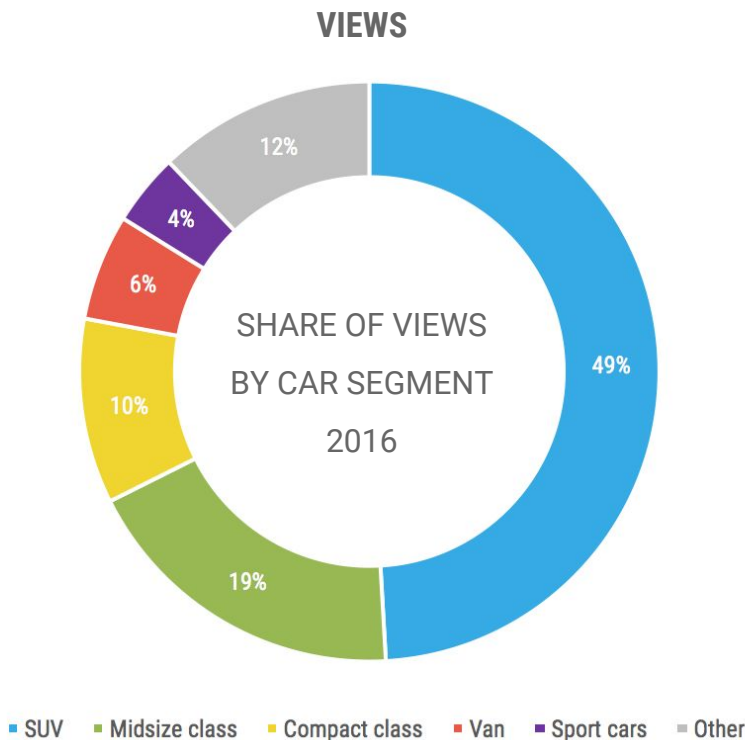


НА СЕВЕР  
ЭКСПЕДИЦИЯ С ВАДИМОМ ДЫМОВИМ

**На Север! Экспедиция Вадима Дымова и Land Rover**  
**Channel: Land Rover Russia**

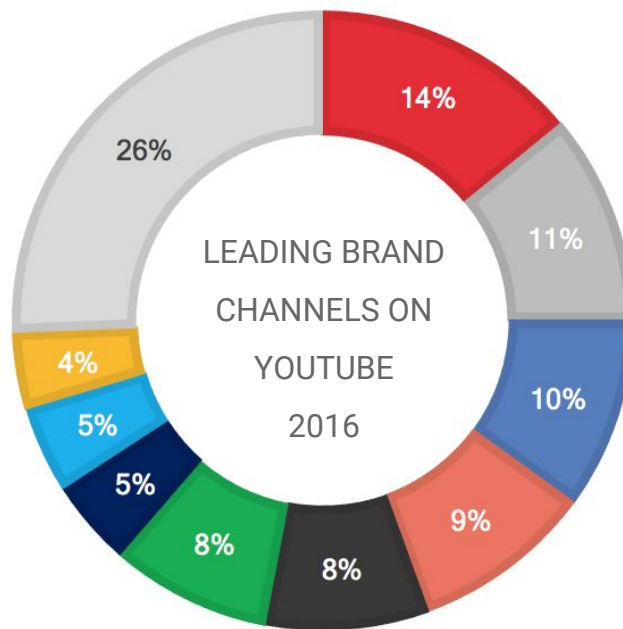
Video with longest view duration - 10 time longer than average branded video

| Almost half of automotive videos viewed in 2016 were about SUVs and this segment also grew the highest YoY



# | Kia and Toyota brand channels attracted the highest amount of viewers on brand channels in 2016\*

■ KIA ■ TOYOTA ■ VW ■ MAZDA ■ AUDI ■ SKODA ■ HYUNDAI ■ BMW ■ NISSAN ■ OTHERS



# Q4 2016 overview

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# 305M

organic views of automotive  
content in Q4 2016

**+27% yoy**

*Organic views only*



# THANK YOU!



Auto@Google

For feedback and questions please reach out to Google Auto team  
[auto-ru@google.com](mailto:auto-ru@google.com)