

Automotive Industry in Russia

Google Trends & Insights - Q2 2016



| Key Q2'2016 findings

01

Automotive interest is growing

Q2'16 search volume in automotive category grew **+10% YoY** mainly driven by aftersales, generic and new car search terms growth

Automarket is mobile first

52% of all automotive queries now come from **mobile**, but mobile auction metrics are still not that competitive compared to desktop

02

03

Hyundai and Mercedes-Benz are leading mass & premium segments

Not many brands are showing growth QoQ, among them are: Hyundai, Renault, Datsun, Peugeot and Jaguar, Porsche and Mercedes-Benz

Off-road cars, SUV's, luxury and compact segments got the most views on YT in Q2

YouTube is a goldmine for brand / product sentiment insight. Brand videos that engaged users the most this quarter were made by BMW, Kia, Mazda and Volkswagen.

Check them out!

04

Part 1

Category trends,
Auction metrics
and Top risers

Part 2

Brand
leaderboard on
Google Search

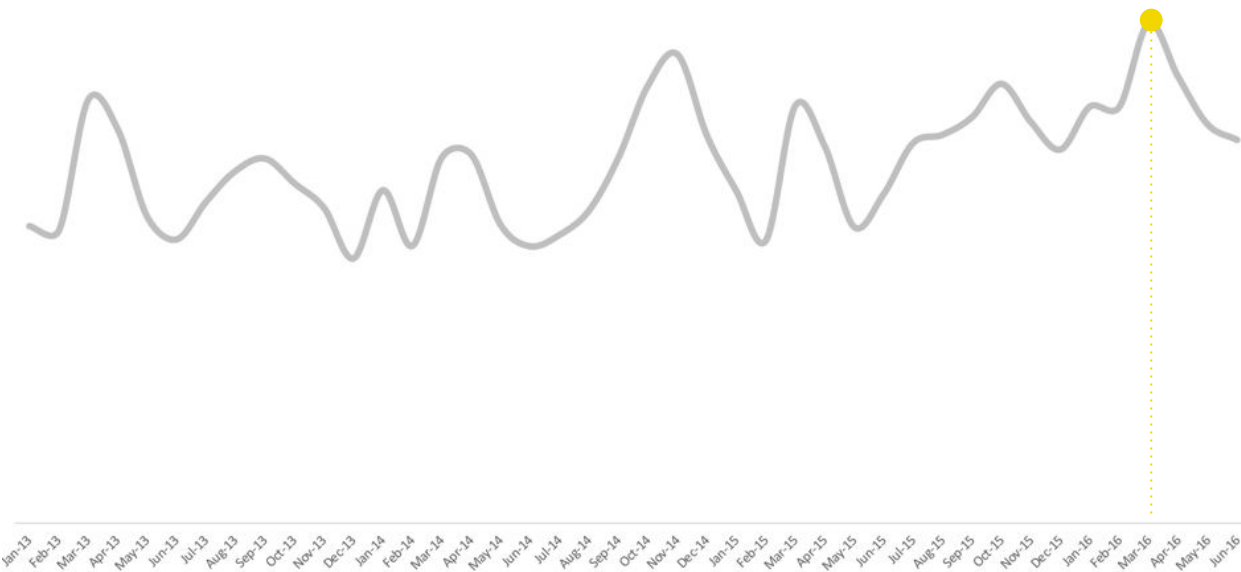
Part 3

A spotlight on
potential to
activate auto
buyers on
YouTube

Searches for cars hit an all-time high in March 2016

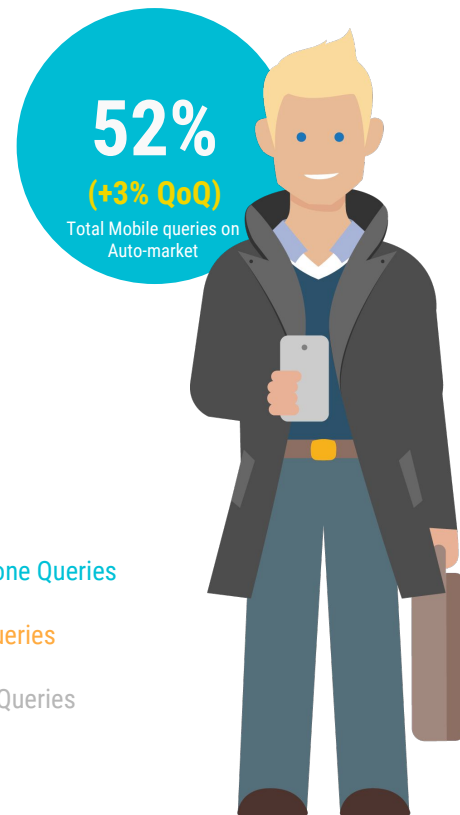
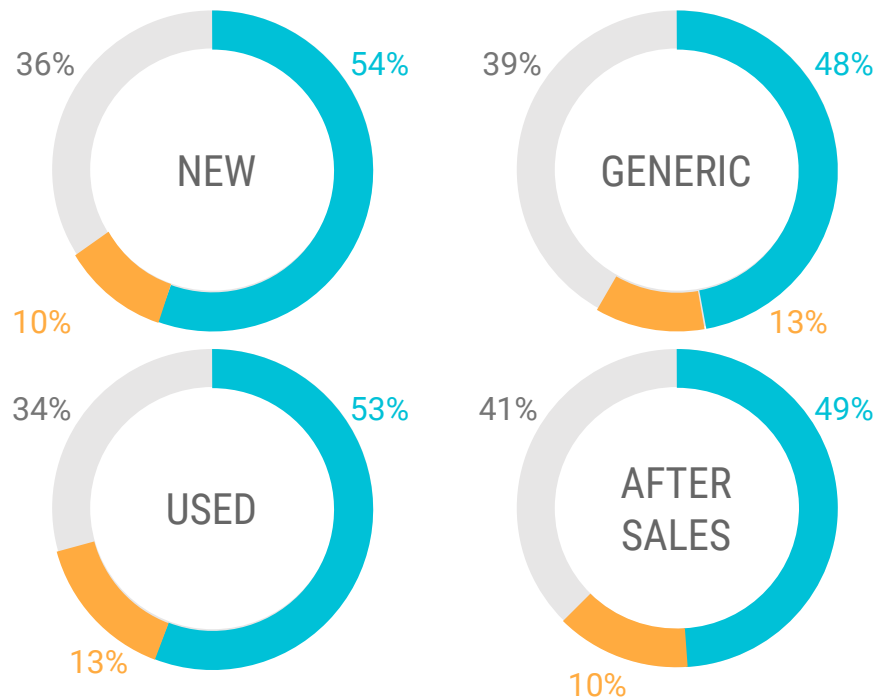
Automotive category query volume

January 2013 - June 2016



Automarket is mobile first - 52% of automotive queries in Q2 came from mobile devices

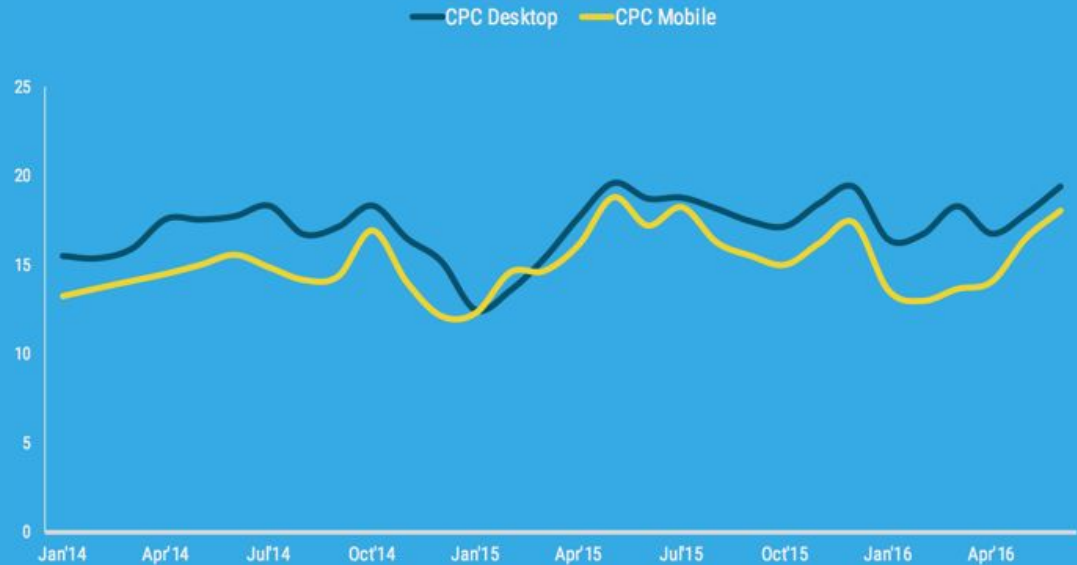
Split of Auto-queries on Google.ru by devices in Q2'16, %



- Smartphone Queries
- Tablet Queries
- Desktop Queries

Driven by the consumers shift to smartphones over desktop the rate of advertisers adoption in mobile is only going to escalate, but as of today Mobile advertising prices in Automotive still remain lower compared to Desktop

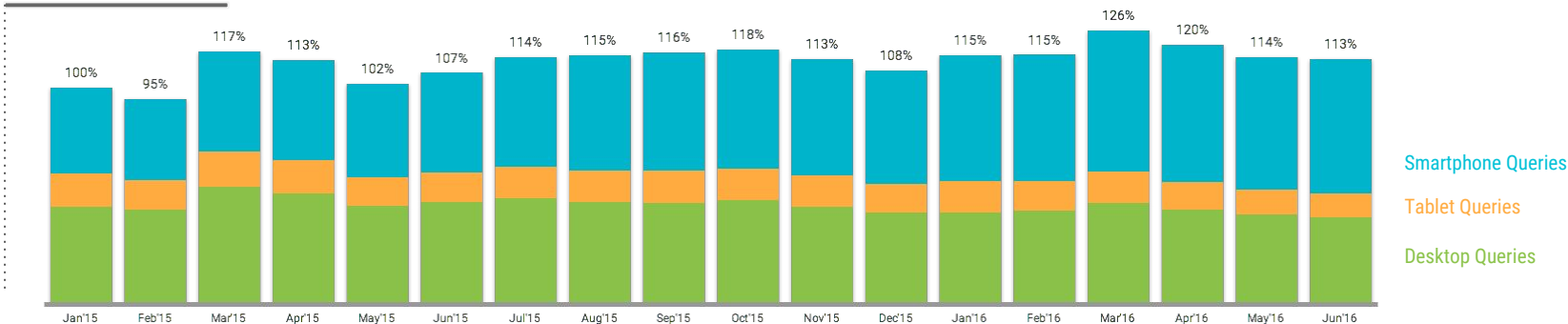
Auction metrics, CPC in RUB



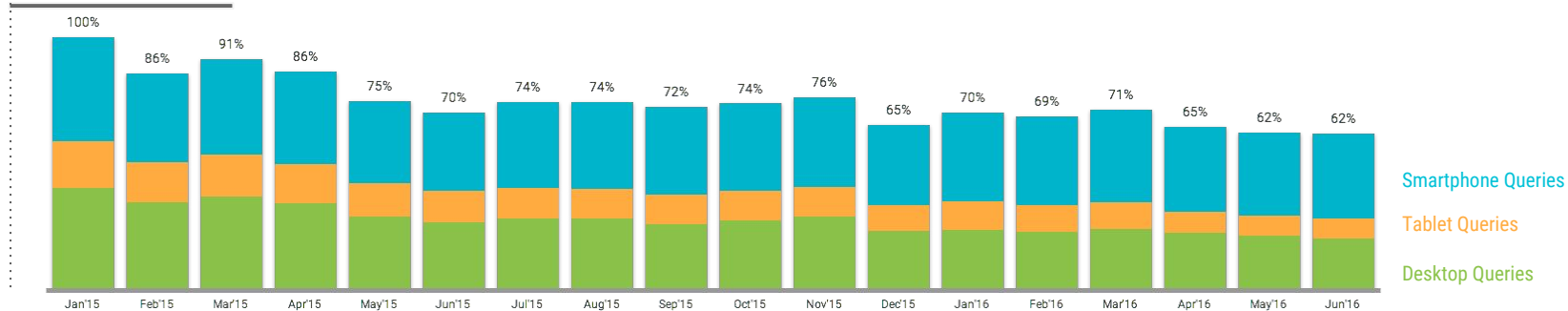
| Interest towards New cars continued to grow in Q2 2016 reaching 14% YoY growth rate speed while used cars query volume is still lower (-18%) compared to high volume in 2015

Indexed query growth 2015 - Q2'2016
100% = number of queries in Jan'15

New cars



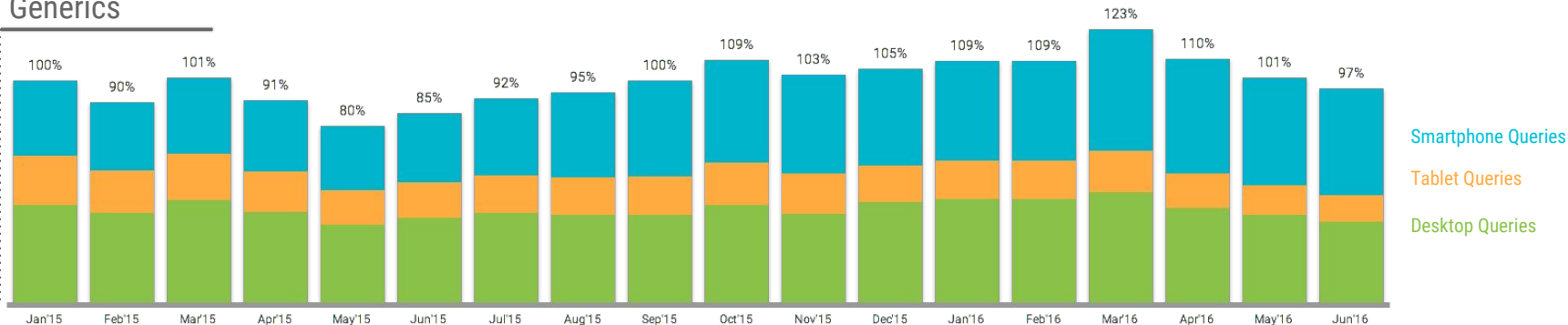
Used cars



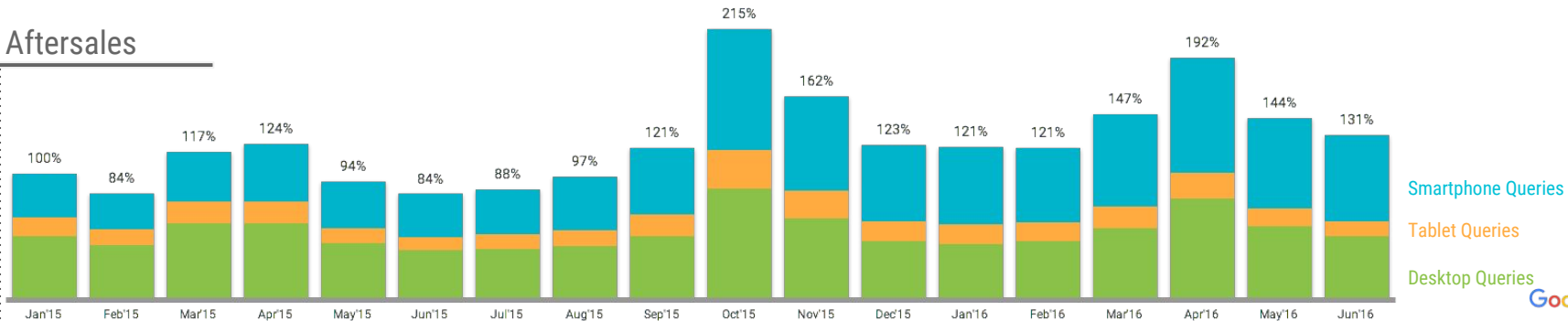
| Generic search volume is still on a rise with growth rate 20% YoY. And After Sales category is a top performer in Q2 - 1.5x higher level of interest compared to Q2 2015

Indexed query growth 2015 - Q2'2016
100% = number of queries in Jan'15

Generics



Aftersales



Top rising queries in Q2 vs Q1 2016



Ranked by volume of searches

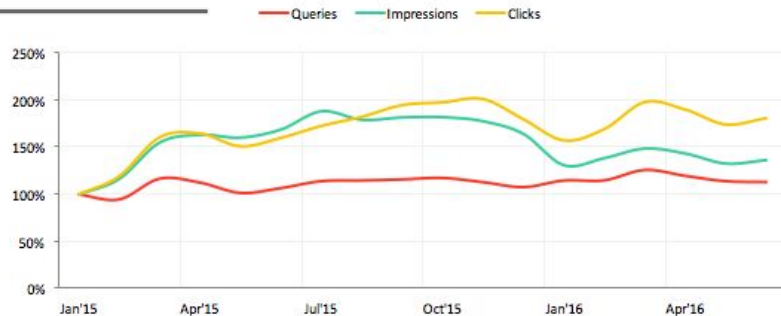
New cars	Used cars	Generic	Aftersales
порше 911 турбо s 2016	купить с пробегом	какой автомобиль лучше	замена передних тормозных колодок
тест драйв шкода рапид 2016	бу автомобиль	итальянские автомобили	шиномонтаж
рено каптур отзывы	kia sportage 2014	лучшие автомобили	замена колес
рено каптур видео	самые надежные автомобили с пробегом	автокредит без первоначального взноса	замена передних амортизаторов
kia соул 2016 тест драйв	авто с пробегом москва	самые экономичные автомобили	замена тормозных колодок
fiat 500s	куплю авто с пробегом	кредит на машину	замена задних колодок

Ad depths in new car segment was lower compared to Q1 while clicks remained relatively stable.
In Used car segment clicks are still on a rise and auction tend to be more competitive compared to new cars.

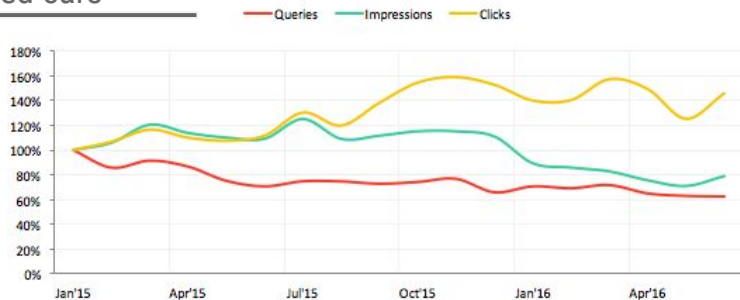
Key industry metrics growth in 2015-Q2'16

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

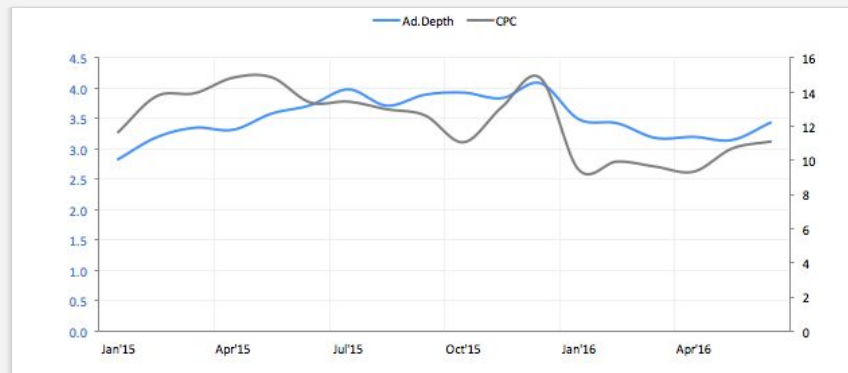
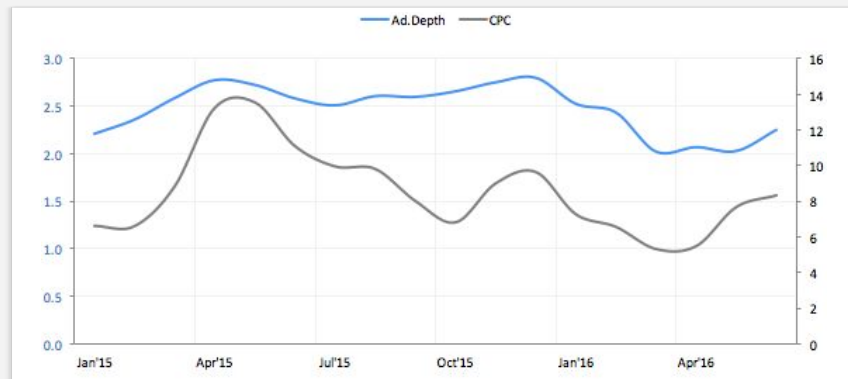
New cars



Used cars



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

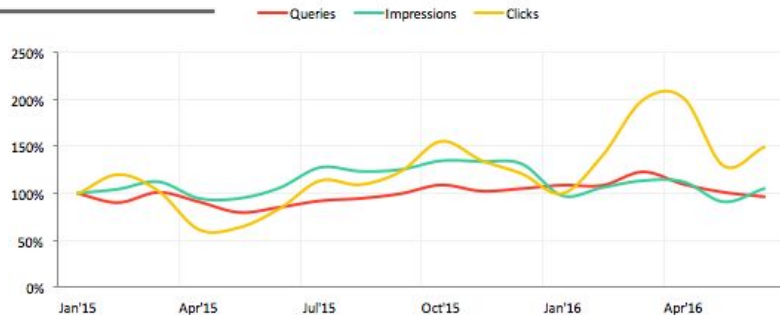


In generic and aftersales categories huge spike in clicks was seen in April while CPC remained on lower level compared to April 2015. Advertisers reduced the presence in Aftersales category in Q2.

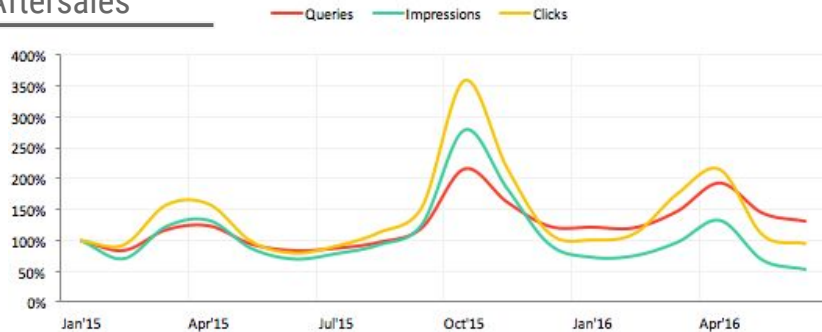
Key industry metrics growth in 2015-Q2'16

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

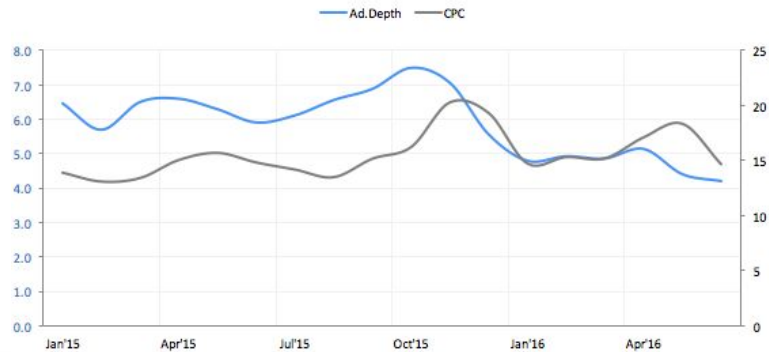
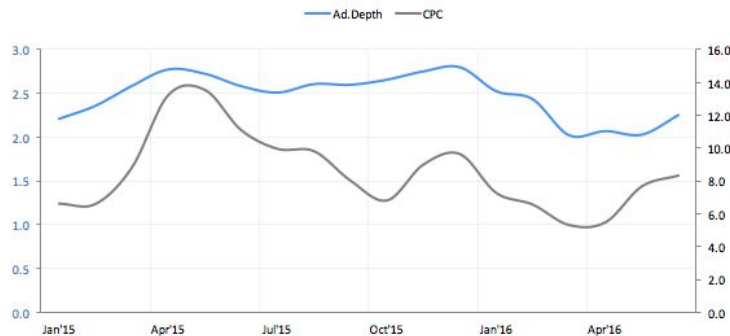
Generics



Aftersales



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



Part 1

Category trends,
Auction metrics
and Top risers

Part 2

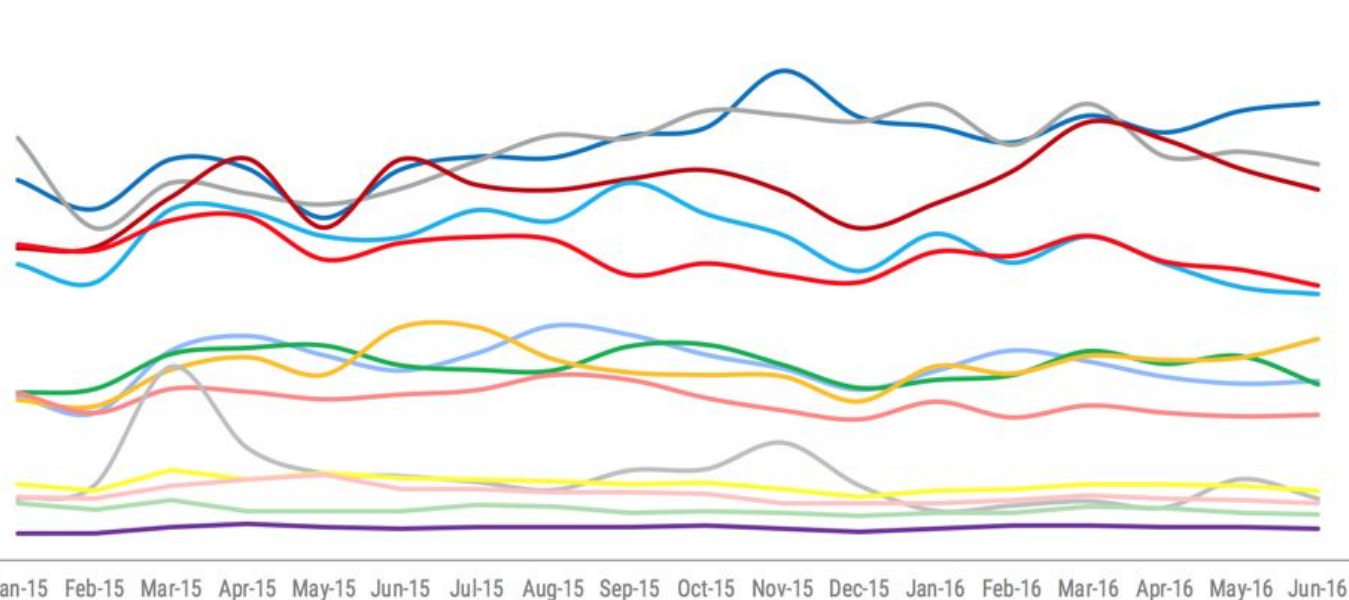
Brand
leaderboard on
Google Search

Part 3

A spotlight on
potential to
activate auto
buyers on
YouTube

Hyundai went back on track in Q2 2016 and became the leader of consumer interest in mass segment. Other growing QoQ brands are - Renault, Datsun and Peugeot

Monthly dynamics of branded queries in Mass segment,
2015 - Q2 2016



Tier 1

Interest towards Kia dropped back in Q2 after high rise in March, while Hyundai leveraged to become a leader

Tier 2

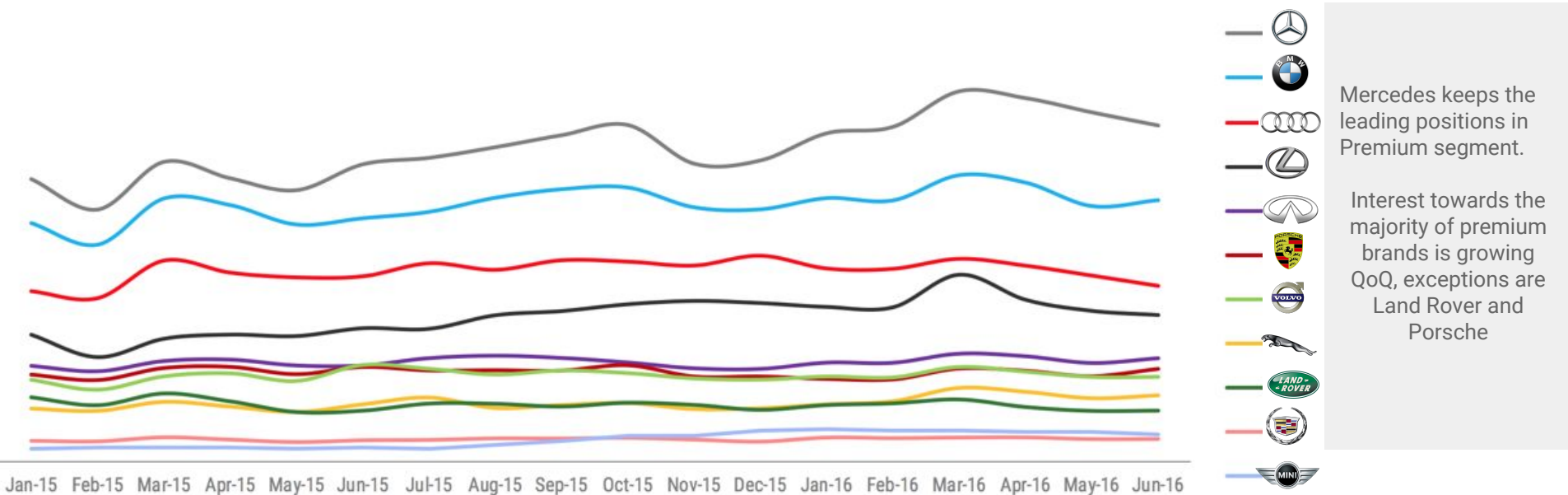
Interest towards Renault is on a rise since the beginning of the year and in holds the first positions in tear 2

Tier 3

In 3rd tear Datsun outperformed Peugeot and Citroen in May and remained on relatively same level till the end of the quarter

| Interest towards Premium segment is growing QoQ, but leaderboard positions remains stable. Fastest growing brands are Jaguar, Porsche and Mercedes

Monthly dynamics of branded queries in Premium segment,
2015 - Q2 2016



Part 1

Category trends,
Auction metrics
and Top risers

Part 2

Brand
leaderboard on
Google Search

Part 3

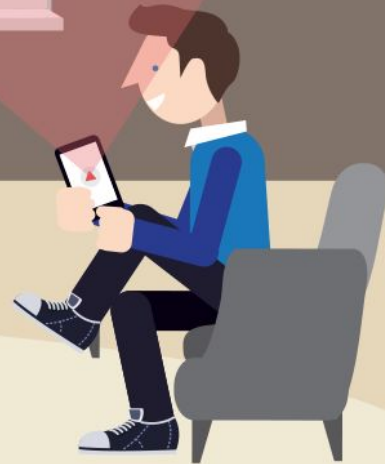
A spotlight on
potential to
activate auto
buyers on
YouTube

48% of TV viewers in Russia say they browse Internet while watching TV

4H 04M A DAY
watching TV

2H 28M A DAY
average user spend
on desktop

1H 50M A DAY
average user spend
on mobile



YouTube is a unique channel.

Users turn to it as much for utility as they do for entertainment. As such it has become an essential part of the car buying process.



78%

of car buyers say they watched online videos to inform their last car purchase

36%

vehicle highlights of features or options

52%

vehicle reviews including interior and walk-arounds

41%

vehicle comparison videos

45%

Test-drive videos

44%

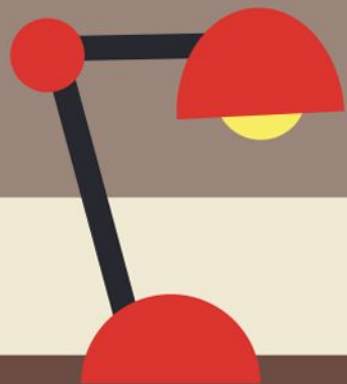
consumer reviews or testimonials

Video overall is a powerful tool in marketers' armouries.

57%

of buyers agree they were introduced to a car they hadn't considered before based on something they watched on online video.

Source: 2016 Google / TNS Global Auto Shopper Study, Russia

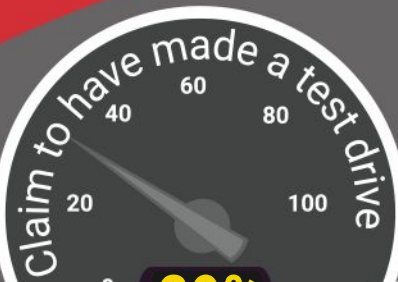


Video leads to action.

60%



Narrowed down the set of considered vehicles after watching online video



48%

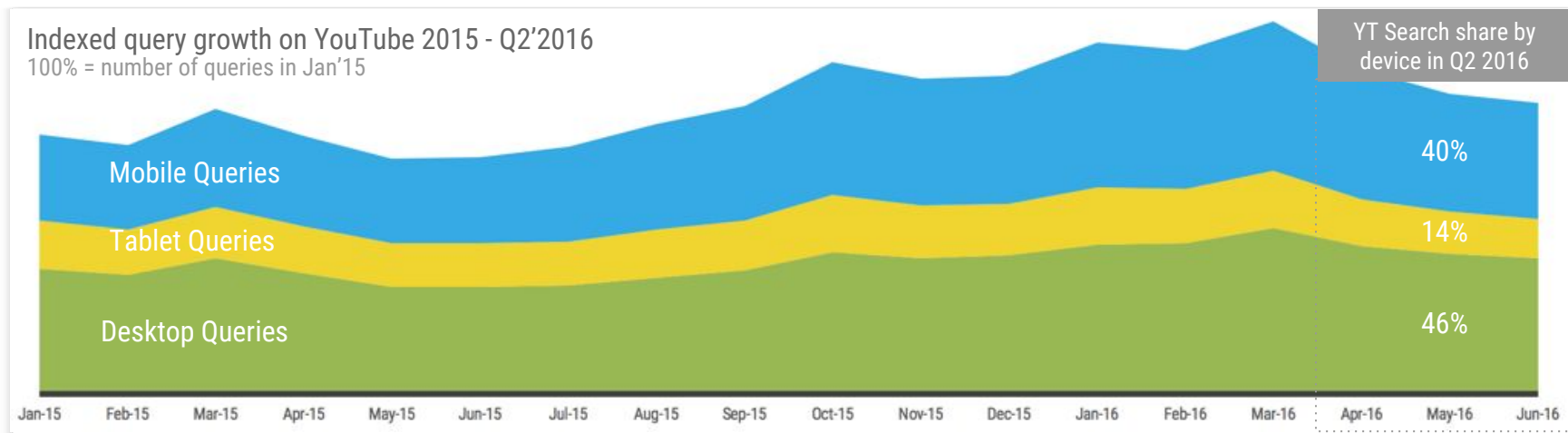
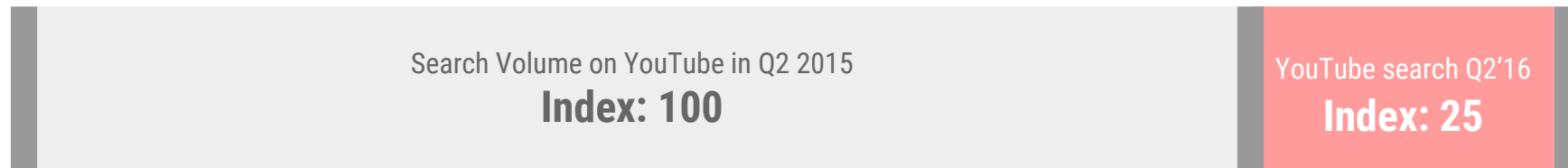


Requested price quote

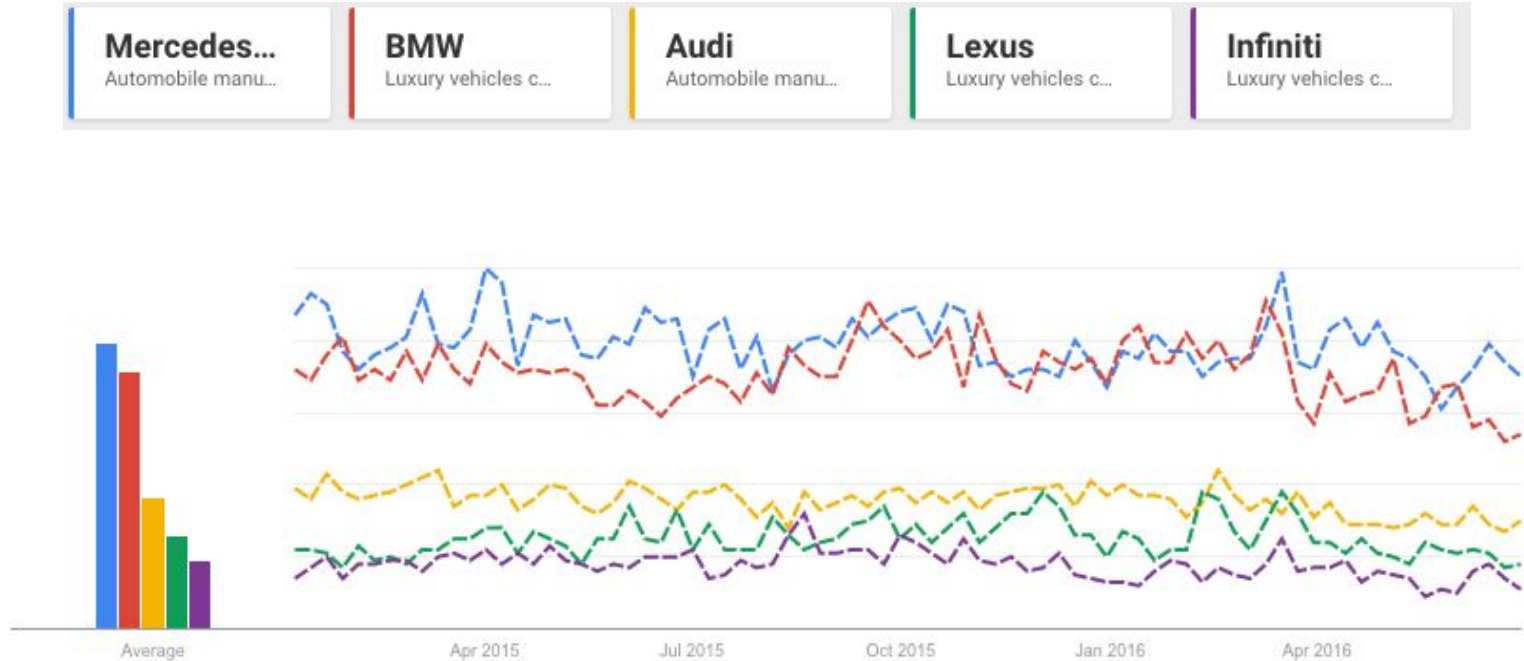
| Automotive search on Youtube is growing 25% year on year

Mobile views account to 40% of all automotive YT views

Automotive search volume growth on YouTube

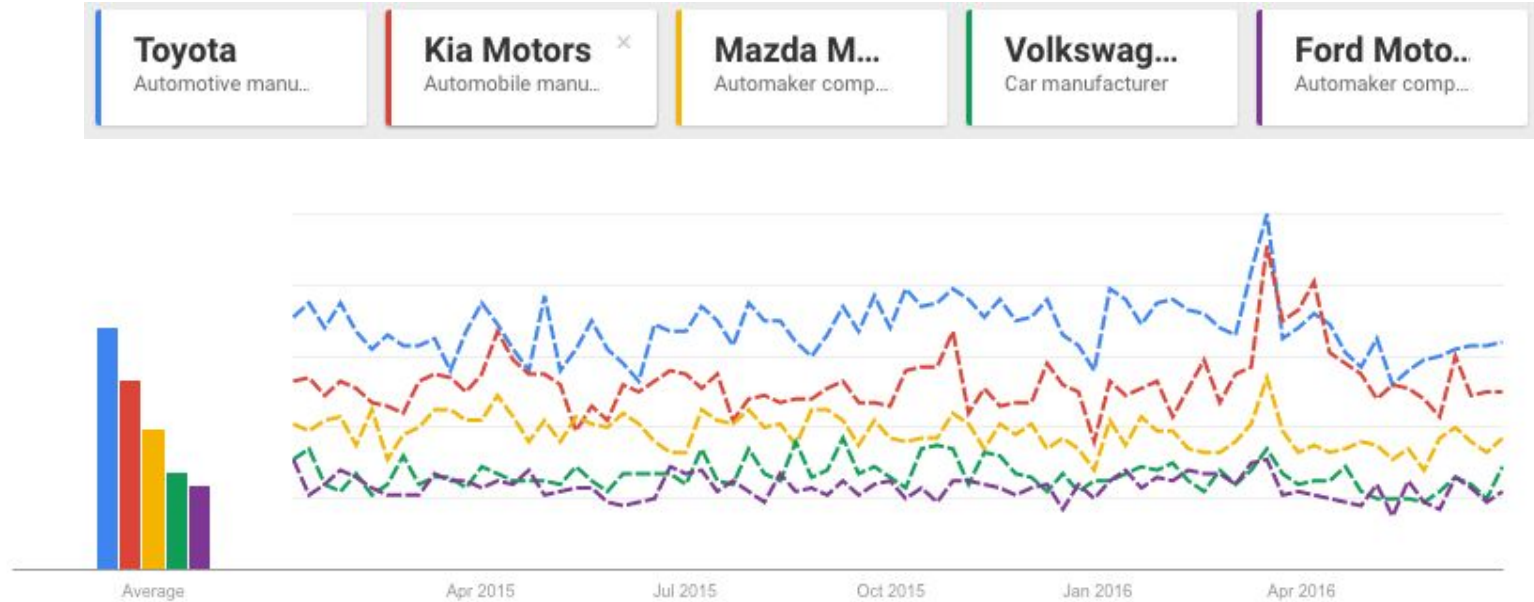


| Mercedes and BMW are the most searched brands in premium segment on YouTube, but in Q2 BMW showed a slight decline in interest



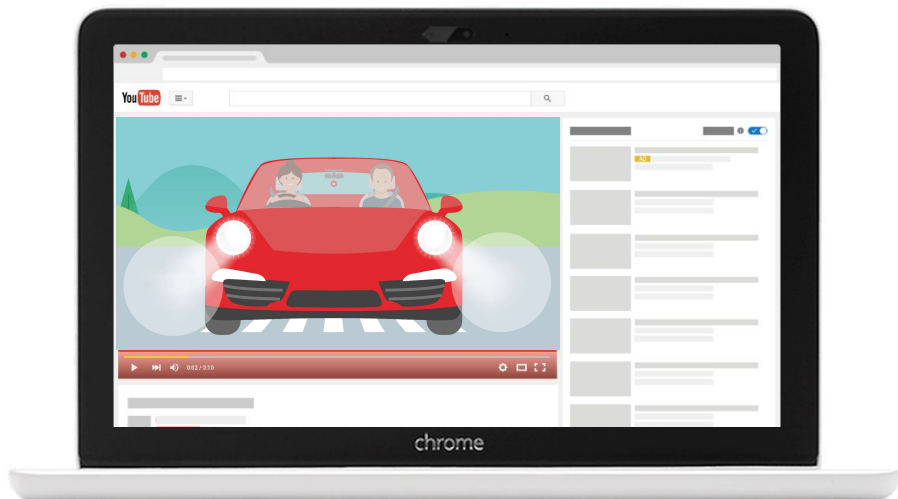
Click on graph to
explore yourself

Unlike Google search on YouTube search Toyota is the leading brand in mass segment



Click on graph to explore yourself

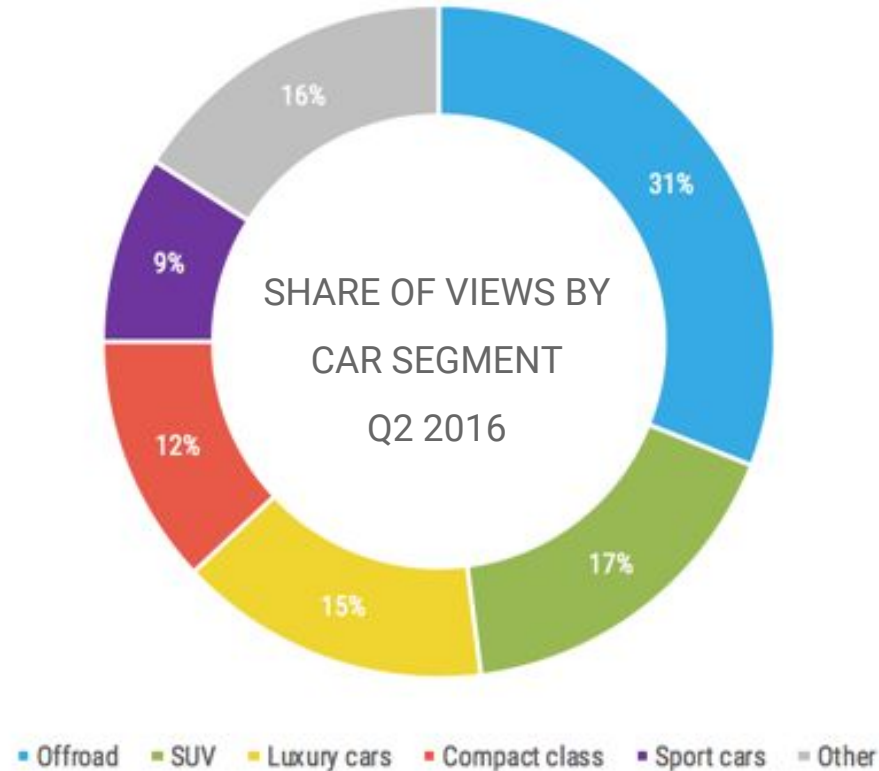
| Automotive content on YouTube is huge



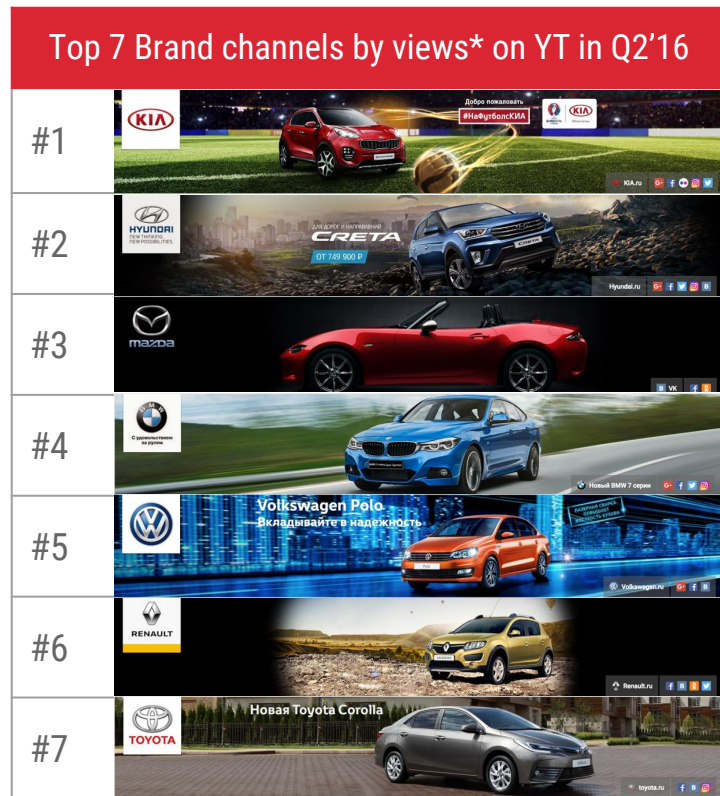
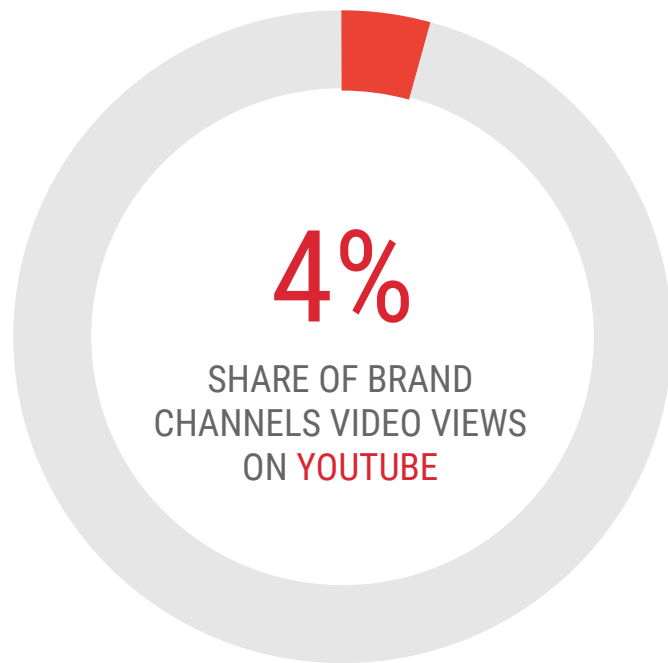
160M+

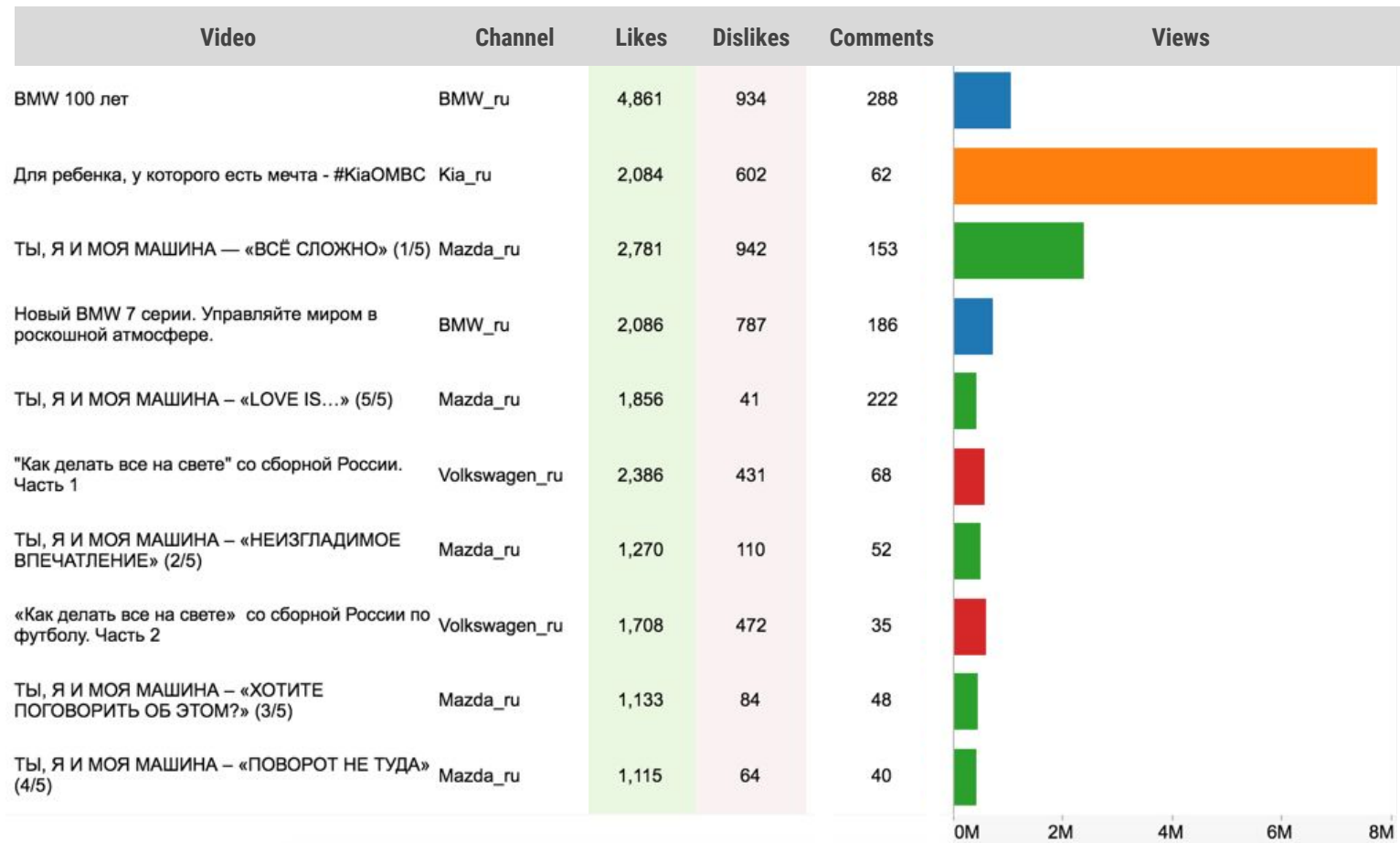
RU views of automotive
content occurred in Q2 2016

| Off-road, SUV, luxury and compact segments were the most popular on YouTube this quarter

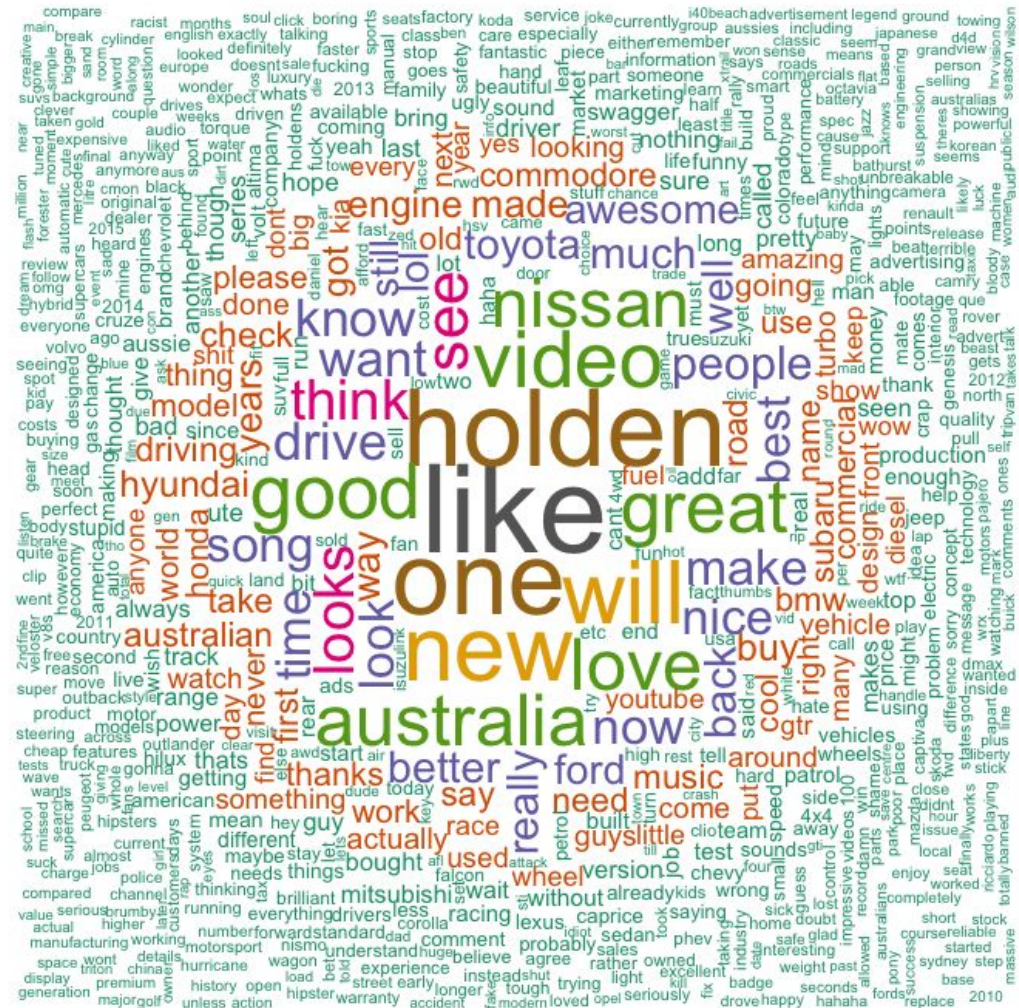


I Only 4% of automotive content watched on YouTube is generated by Automotive Brands





YouTube is a goldmine for brand / model sentiment insight



| Use YouTube metrics to analyse creatives and improve your Branded content performance



1

Leverage available media to get buy-in from your target audience **before** pushing ads to the masses

2

Check if your creative resonates with the right audience (demographic/psychographic)

3

Find how engaged your audience is with a new creative - does it get likes/ shares/ positive comments

4

Evaluate the effect of the campaign in shifting brand recall and driving incremental searches via Brand Lift Surveys

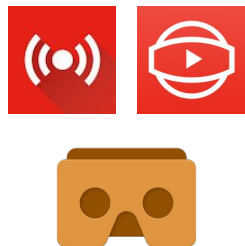
Wonder how to make your
idea even better?

| Move it from being exclusive to inclusive

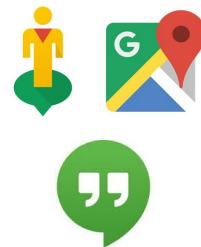
Use YouTube technology to make the idea more accessible to more users by either allowing them to view the content in a different way or to personalise it



More
Accessible



More
Personal



| Examples how to make automotive campaigns more accessible and personal for users



Livestream

Encourage users to watch new episodes of branded shows/series in real time

[Example livestreams](#)



360 Video

Get the users inside your car and give them the feeling that they are a part of experience

[Example auto 360 videos](#)



Cardboard

Give users engaging and easy way to experience your branded content

Example automotive Cardboard campaigns: [Volvo](#) / [Lexus](#)



GMaps & Street View

Make your ads more personal by allowing users to see where each campaign takes place in Google maps

[Auto Street View example](#)

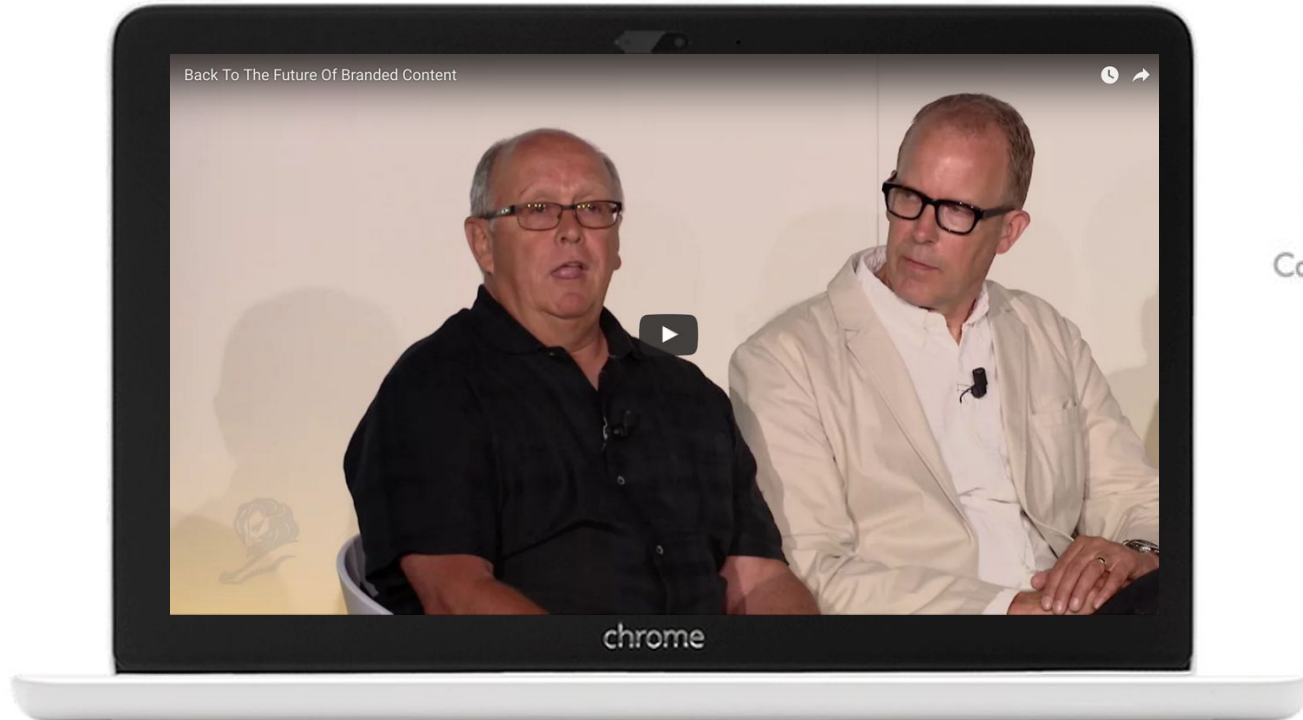


Hangout

Use hangouts in your livestream episode to give users the power to connect & participate remotely in real time

| **BONUS PACK:** Video that inspired us this quarter

MAYBE ADS DON'T HAVE TO BE BEAUTIFUL..



Cannes Lions 2016.



Thank you!

For feedback and questions please reach out to Google Auto team

auto-ru@google.com

