

The background image shows a factory setting with several yellow robotic arms, specifically Fanuc R-2000B models, working on a car chassis. The scene is dimly lit, with the primary light source coming from the robotic arms and the car's body. The text is overlaid on this image.

AUTO INDUSTRY RUSSIA Q3 2016

Google Trends and Insights



| Key Q3'2016 findings

01

Automotive interest is growing

Q3'16 search volume in automotive category grew **+7% YoY** mainly driven by aftersales, generic and new car search terms growth

Automarket is mobile first

55% 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

Mass segment decreased by **-4% YoY**, when luxury segment grew **+1% YoY**

Part 1

Category trends,
Auction metrics
and Top risers

Part 2

Brand
leaderboard on
Google Search

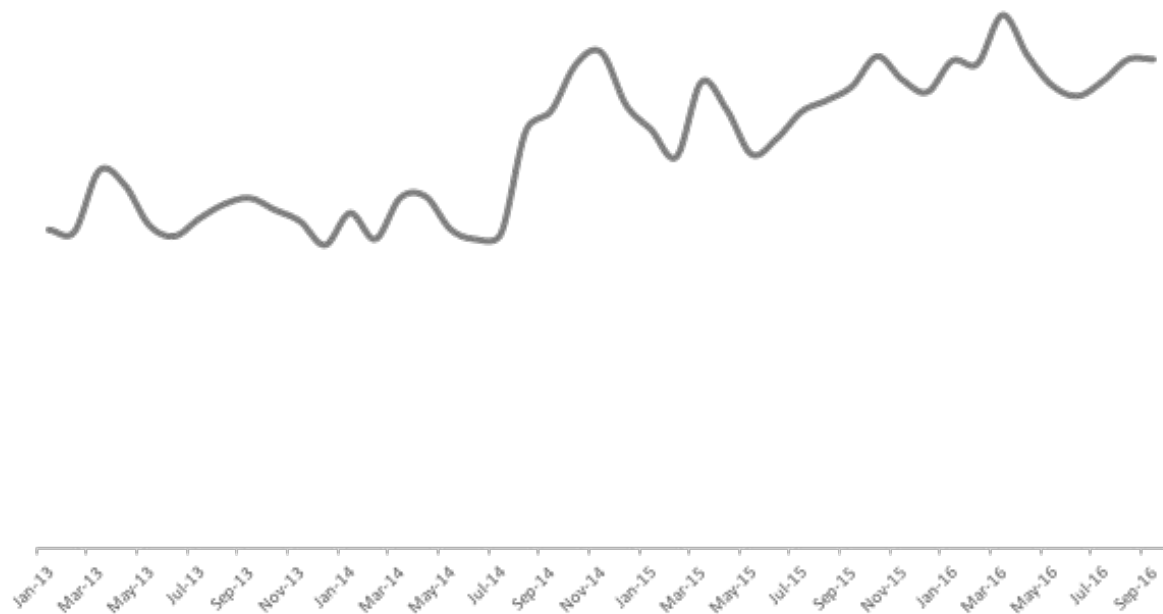
Part 3

A spotlight on
automotive
brands
performance on
YouTube

Search for cars has grown +7% YoY in Q3'16

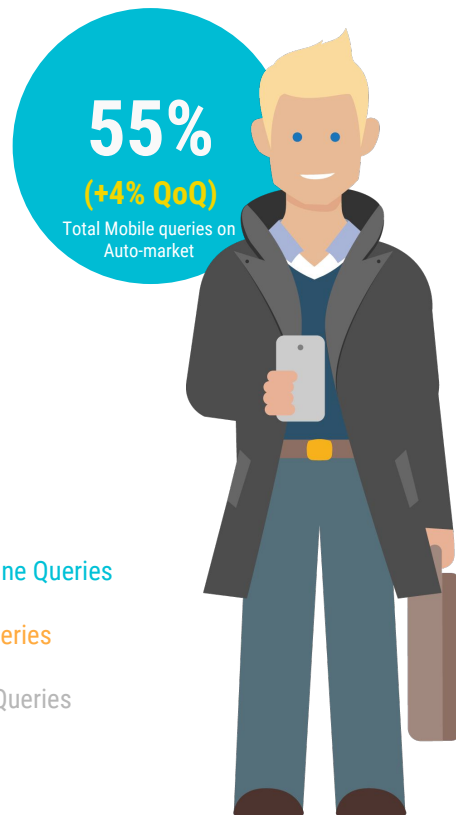
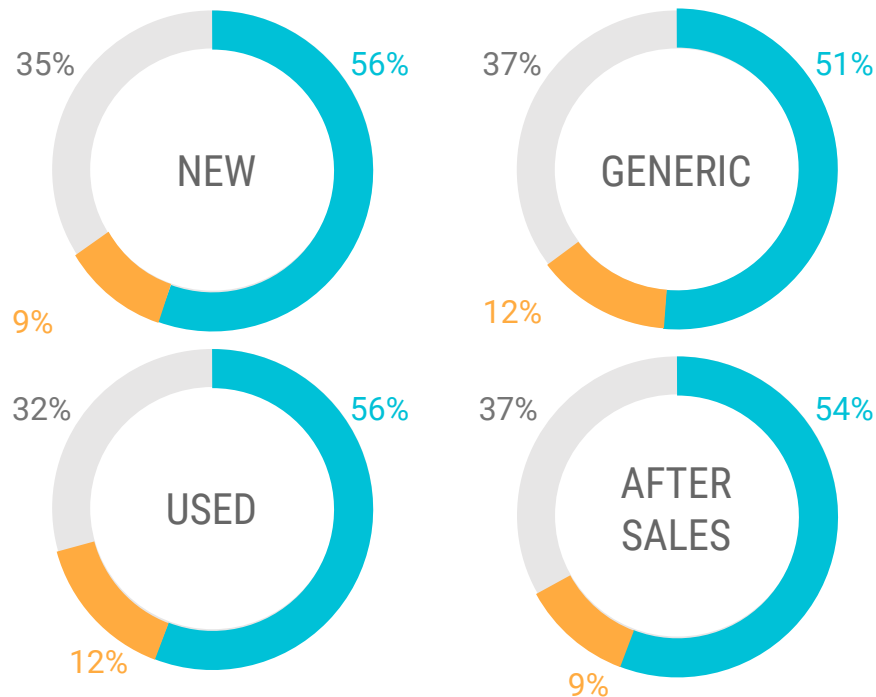
Automotive category query volume

January 2013 - Q3'2016



Automarket is mobile first - 55% of automotive queries in Q3 came from mobile devices

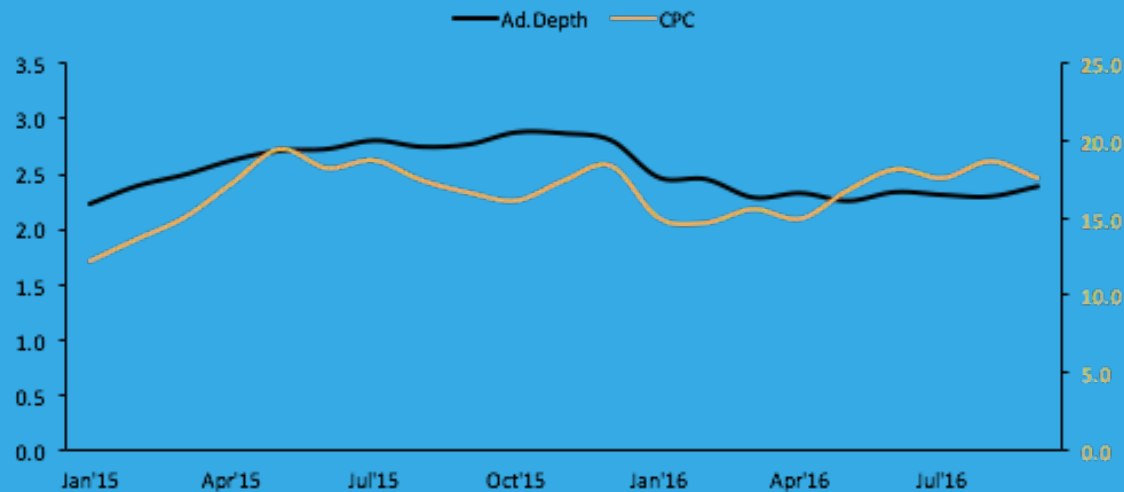
Split of Auto-queries on Google.ru by devices in Q3'16, %



- Smartphone Queries
- Tablet Queries
- Desktop Queries

Ad depth is stabilised in average point of 2.3 for past two quarters for all categories while average CPC grew by +8%

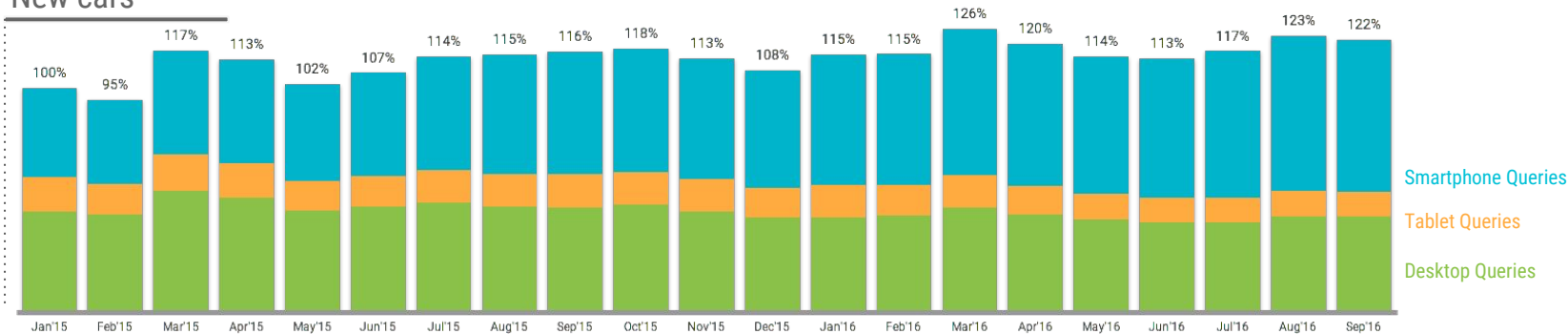
Auction metrics, CPC in RUB



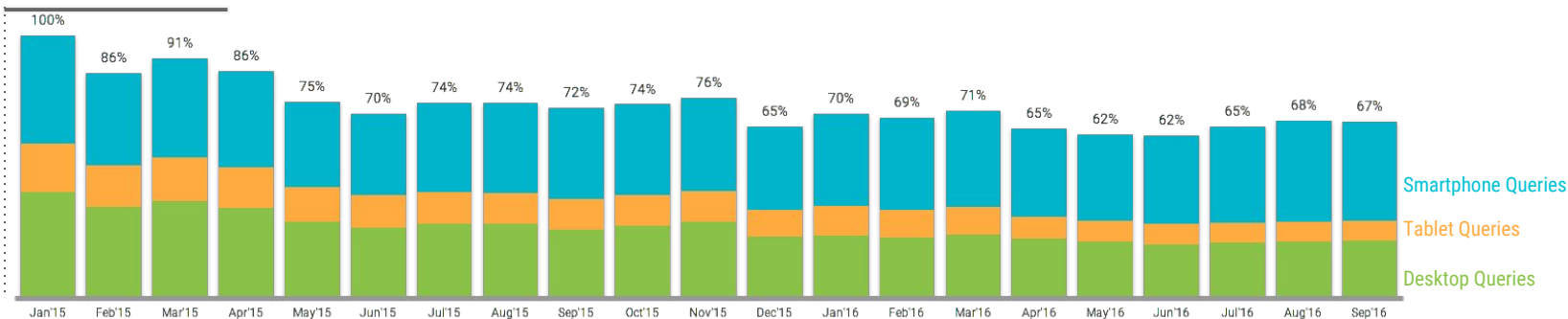
| Interest towards New cars continued to grow in Q3 2016 reaching 5% YoY growth rate speed while used cars query volume is still decreasing (-9%) YoY

Indexed query growth 2015 - Q3'2016
100% = number of queries in Jan'15

New cars



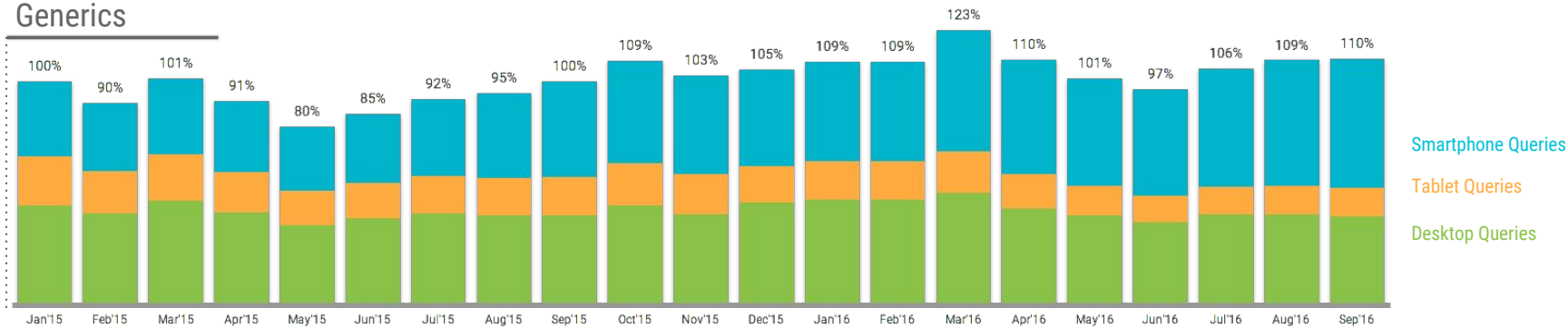
Used cars



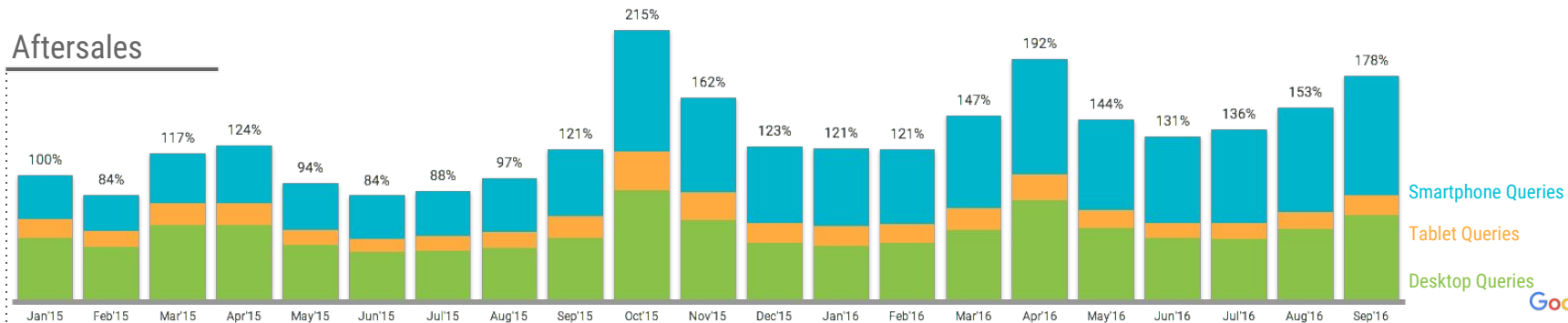
| Generic search volume is still on a rise with growth rate 13% YoY.
And After Sales category has +53% rise YoY in Q3'16 vs. Q3'15

Indexed query growth 2015 - Q3'2016
100% = number of queries in Jan'15

Generics



Aftersales



Top rising queries in Q3 vs Q2 2016



Ranked by volume of searches, greater than 1000 queries

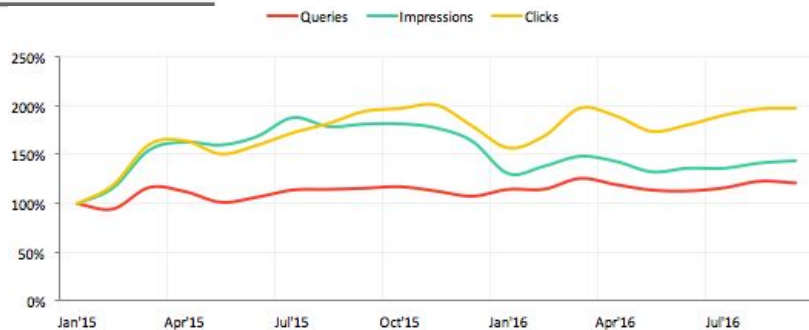
New cars	Used cars	Generic	Aftersales
lexus ls 460 long	продажа авто спробегом	московский международный автосалон	зимняя резина
kia cerato yd	купить машину б у	автокредит калькулятор	зимние шины
бмв х4 2016	авто с пробегом тюмень	купить автомобиль	зимние шины купить
новый форд эксплорер	ford explorer 2013	какой автомобиль лучше	замена моторного масла
новый ford explorer	купить автомобиль бу	кроссоверы цены	шипованная резина
ауди ку5	купить б у авто	кроссоверы фото	замена задних колодок

| Ad depths in new car segment stagnated while CPC has grown to 21.3
In Used car segment clicks are still on a rise and ad depth grew to 3.6

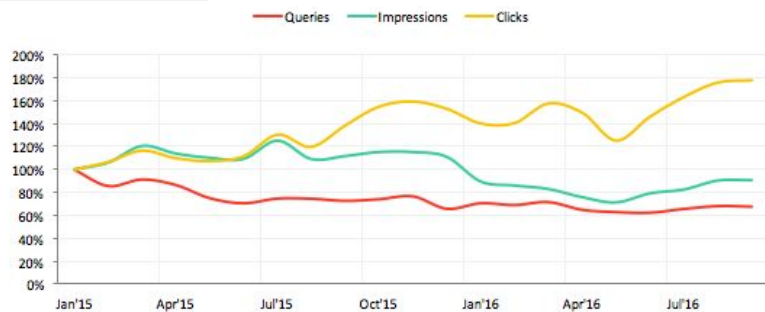
Key industry metrics growth in 2015-Q3'16

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

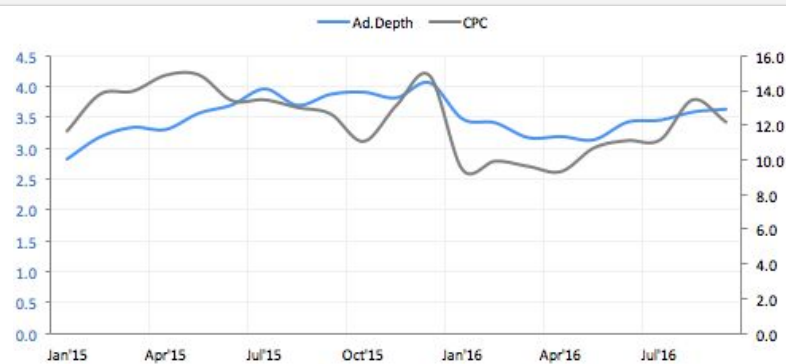
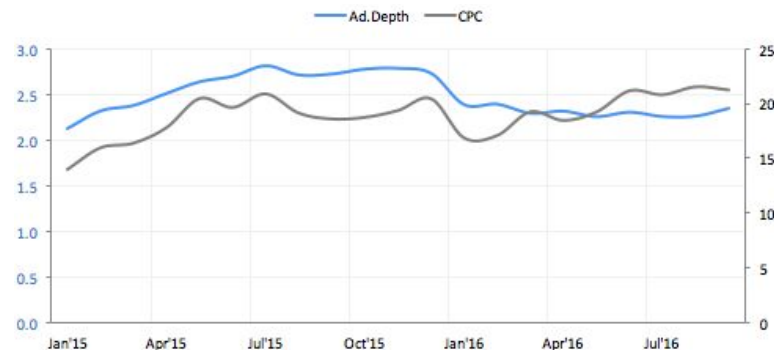
New cars



Used cars



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

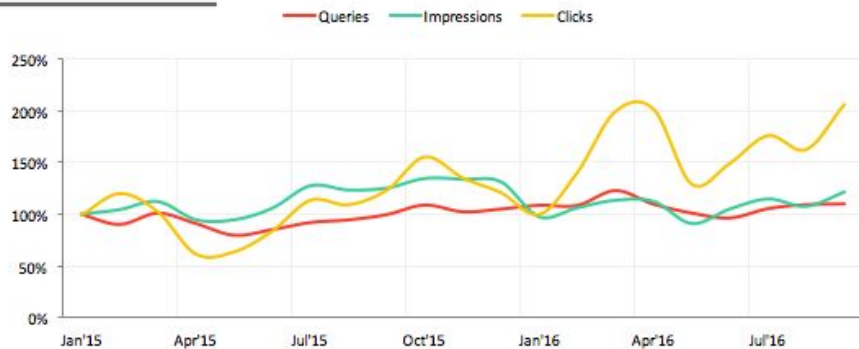


In generic category we see rise in clicks and CPC grew to 9.4 in August'16
In aftersales category we see grow in clicks, but CPC is lowering

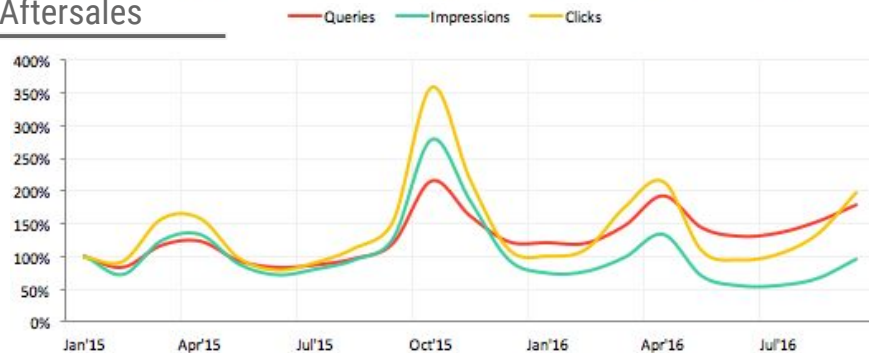
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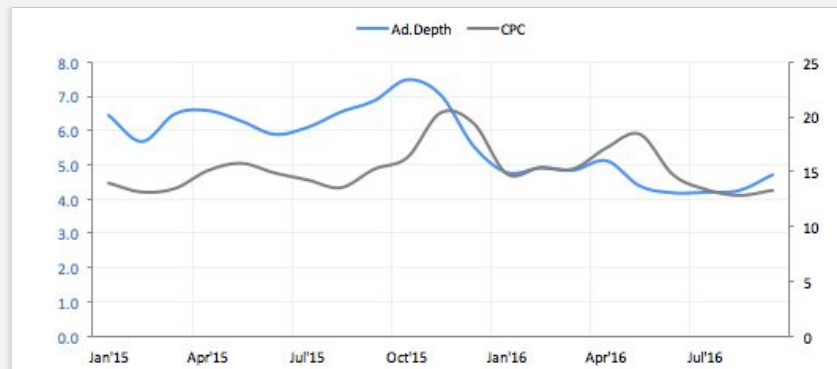
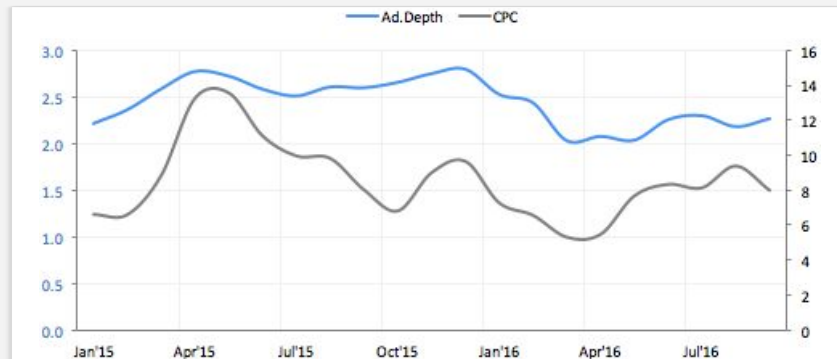
Generics



Aftersales



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



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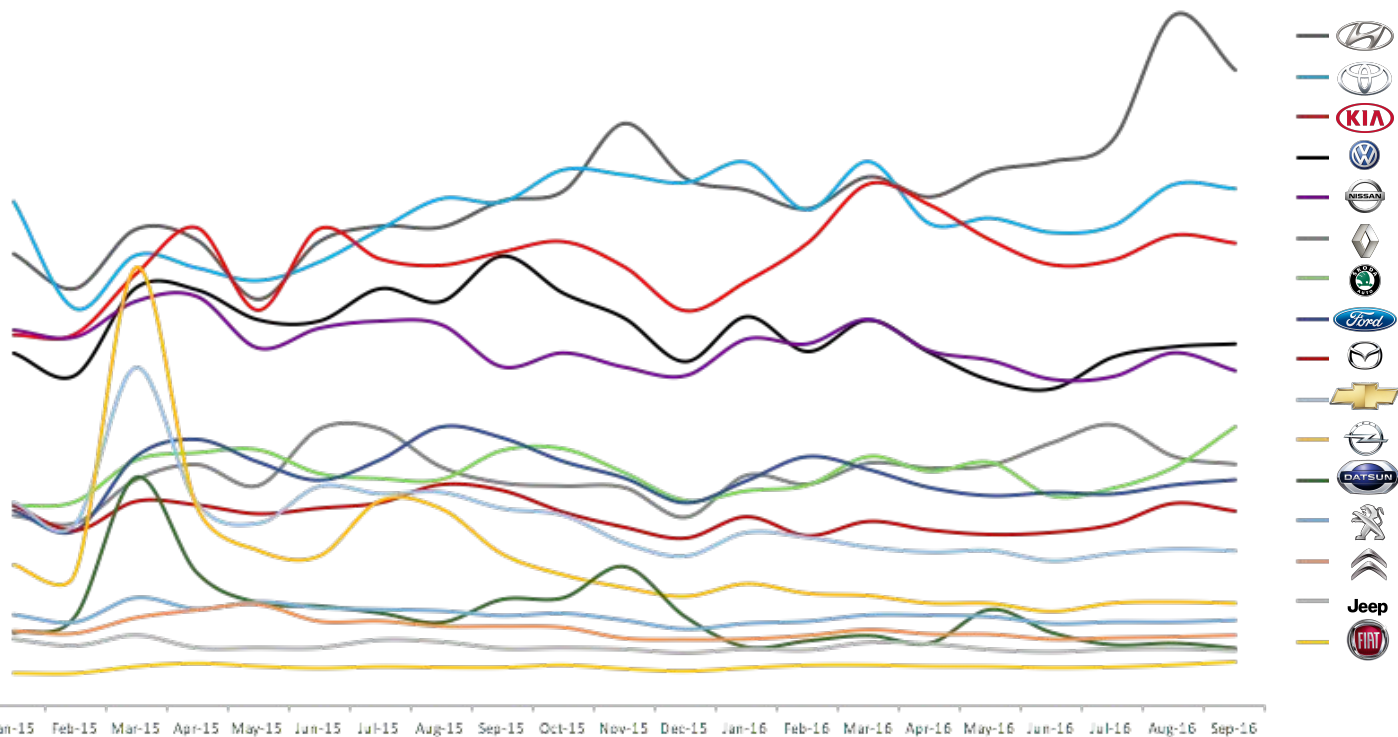
Brand
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Part 3

A spotlight on
automotive
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performance on
YouTube

| Hyundai is a leader with +29% YoY growth in Q3'16.
When overall mass segment is decreasing YoY -4.3% in Q3'16.

Monthly dynamics of branded queries in Mass segment,
2015 - Q3' 2016



Tier 1

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

Tier 2

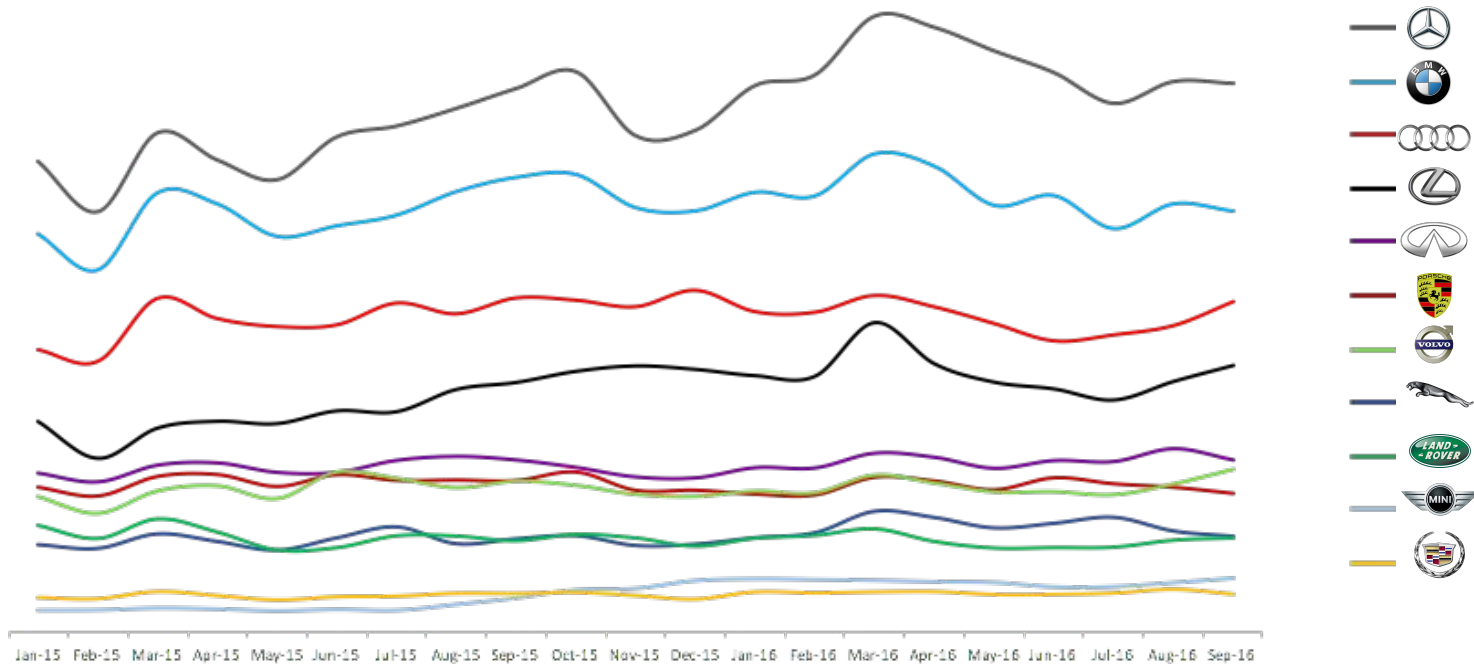
Interest towards Renault is on a rise since the beginning of the year and in holds the first positions in tier 2

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 +1% YoY, but leaderboard positions remains stable. Fastest growing brand is Mini with +80% Q3'16 vs. Q3'15

Monthly dynamics of branded queries in Premium segment,
2015 - Q3 2016



Mercedes keeps the leading positions in Premium segment.

Interest towards the majority of premium brands is, +80% growth towards Mini

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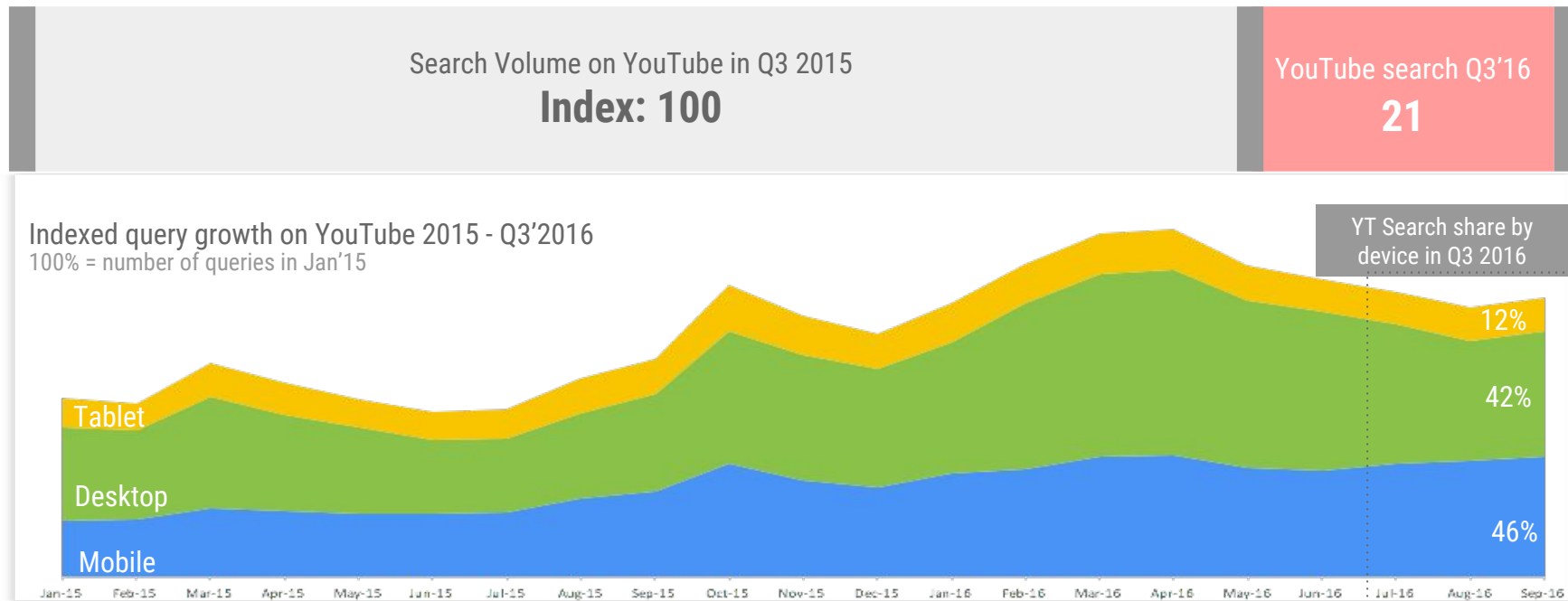
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| Automotive search on Youtube is growing 43% YoY

Mobile views account to 42% of all automotive YT views

Automotive search volume growth on YouTube

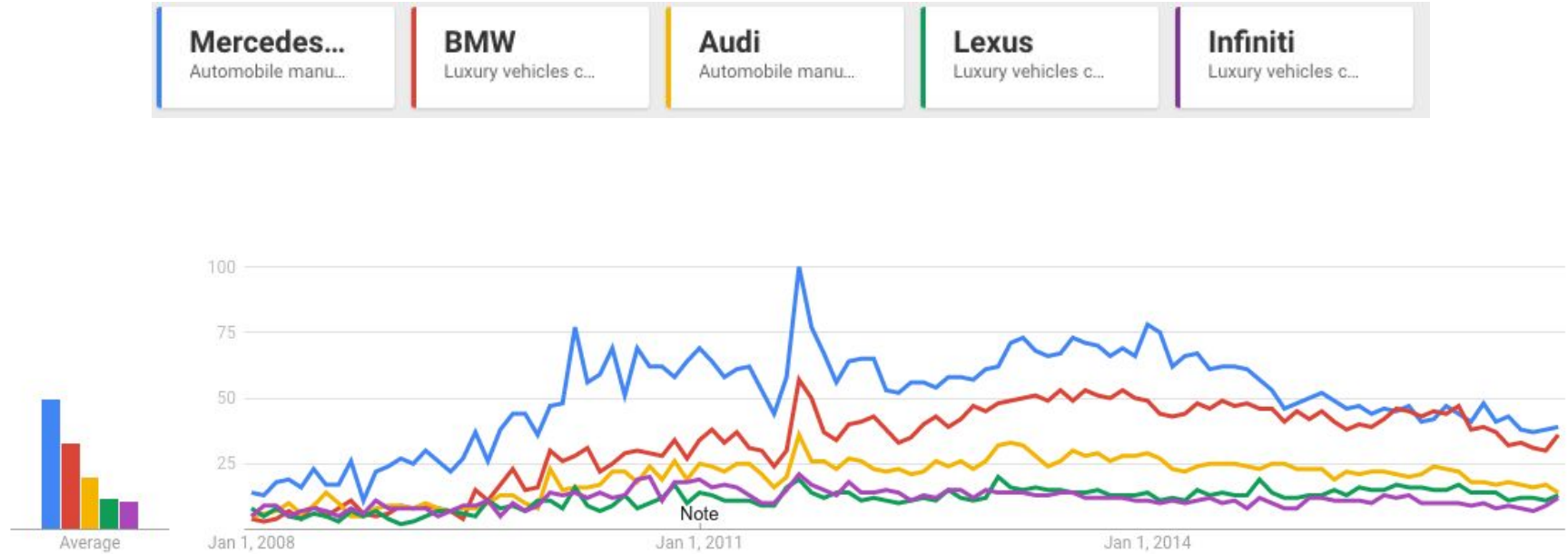


Unlike Google search on YouTube search Toyota is the leading brand in mass segment



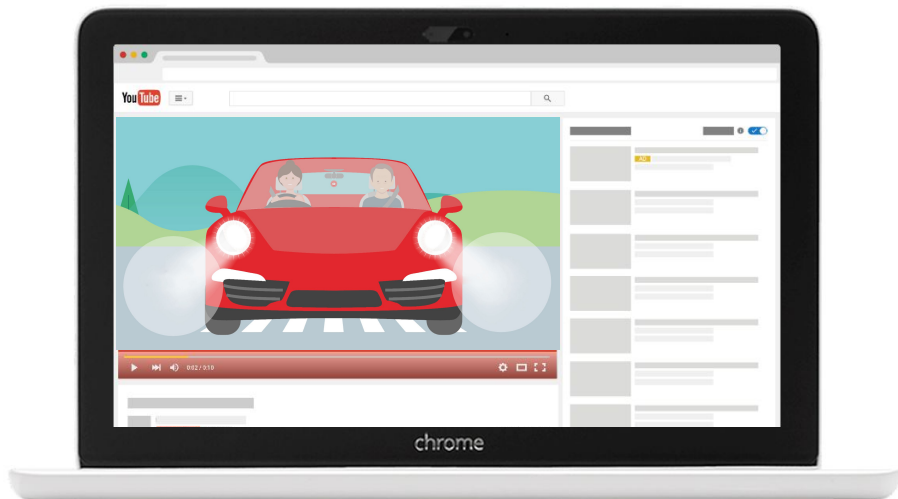
Click on graph to explore yourself

| Mercedes and BMW are the most searched brands in premium segment on YouTube, but in Q3 BMW showed a slight decline in interest



Click on graph to
explore yourself

| Automotive content on YouTube is huge

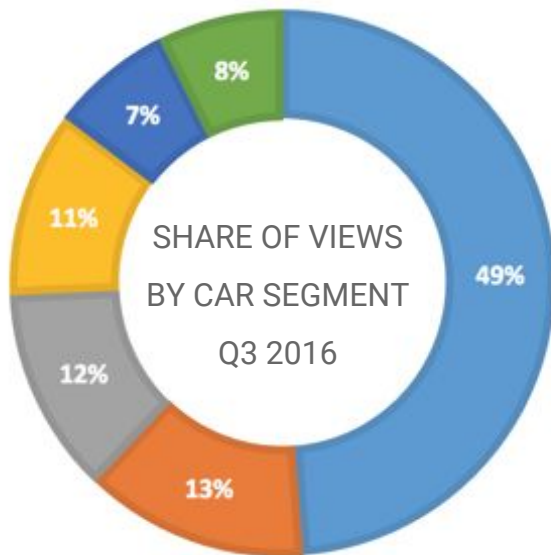


270M+

organic views of automotive
content occurred in Q3 2016
in Russia

| SUVs, compact segments and sport cars were the most popular on YouTube this quarter

■ SUV ■ Compact class ■ Sports car ■ Upper class ■ Midsize class ■ Other

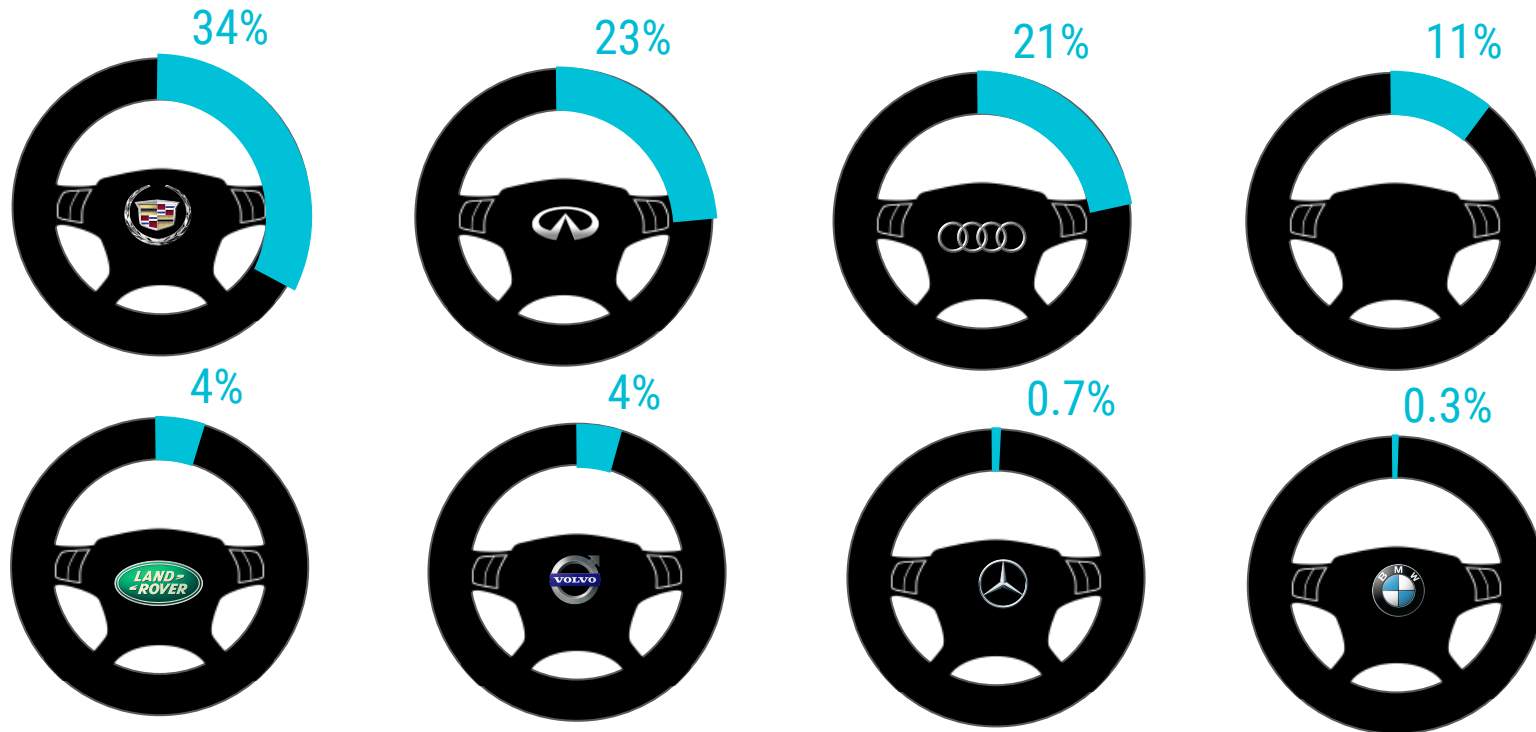


| 10% of automotive content watched on YouTube is generated by Automotive Brands



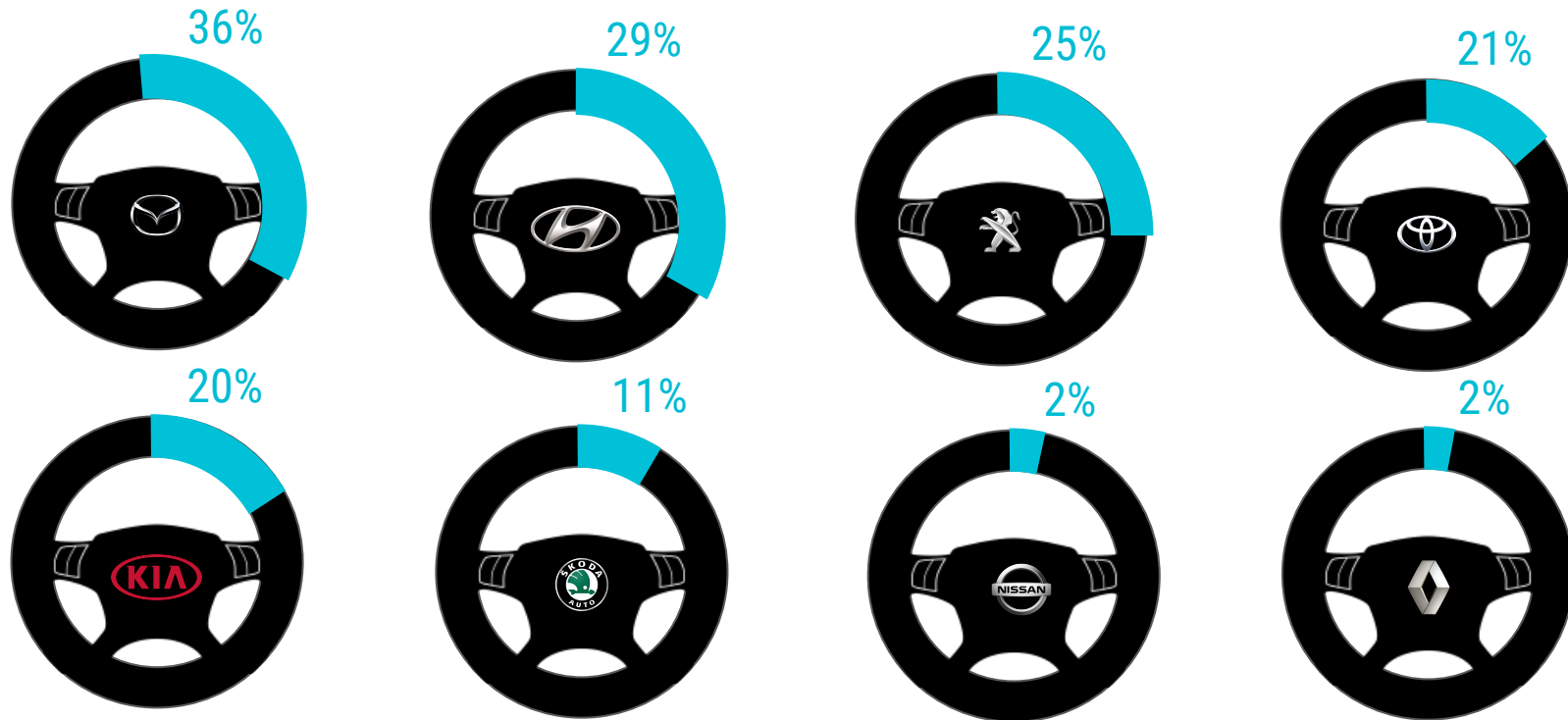
| Cadillac, Infiniti and Volvo have the highest branded content share among all videos featuring this brands watched

Share of branded videos views on YouTube in auto lux category,
Q3 ' 2016



| Mass segment is more active on Youtube - 5 brands account to over 20% of relevant video views

Share of branded videos views on YouTube in auto mass category,
Q3 ' 2016



| Kia, Audi and VW brand channels attracted the highest amount of viewers in Q3 2016

■ KIA ■ AUDI ■ VW ■ CADILLAC ■ TOYOTA ■ INFINITI ■ MAZDA ■ HYUNDAI ■ RENAULT ■ Others





Thank you!

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