



Automotive Industry in Russia

Google Trends & Insights - Q1 2016

April 2016

| Key Q1'2016 findings

01

Automotive
interest is growing

Q1'16 search volume
in automotive category
grew +14% YoY and
+5% QoQ mainly driven
by generic and new car
search terms growth

Mobile presence is
important

1 in 2 cars and
aftersales searches
comes from a mobile
device

02

03

Toyota returns
leadership in mass
segment; KIA grew
the fastest

Toyota competed intensely
with Hyundai by brand
interest and finally gained
the 1st place in March.
Premium segment leaders
are stable

Russia ranks 2nd
globally in terms of
Automotive video
views

Over 500M of automotive content
views were fixed on YouTube in
Q1 2016 and this number is
growing QoQ and YoY

04

| Industry overview



I 'Universe' of auto-related queries in Russia created from ~30k keywords. They are split into 4 groups and 10 sample queries from each segment listed below

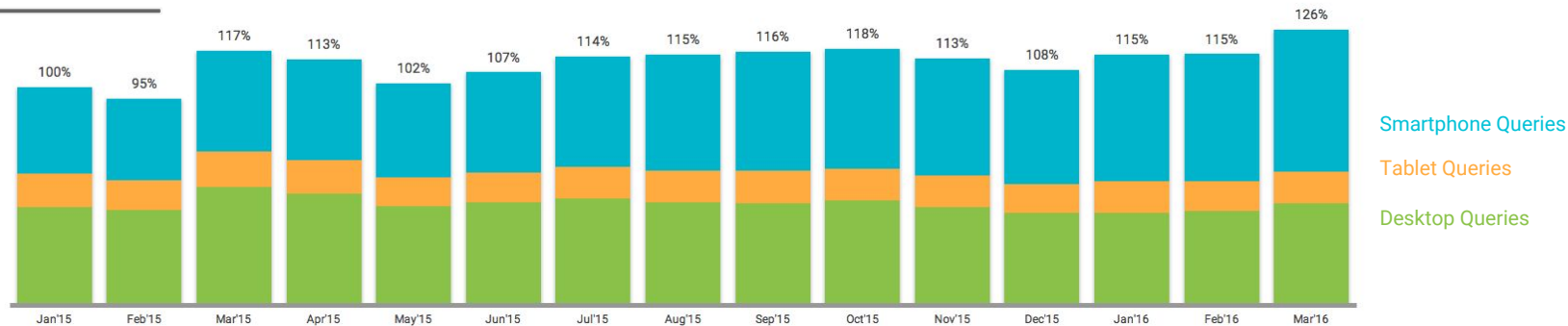
Keyword Examples for Segment Analysis,
random 10 keywords

New cars	Used cars	Generic	Aftersales
kia спортаж	опель с пробегом	кроссоверы	диски land rover
Audi Q5	bmw x1 2013	внедорожники	замена масла в акпп опель астра
мазда 6	купить машину бу в москве	какую машину выбрать	замена ремня генератора пежо
хендай i30	авто с пробегом	каталог авто	зимние шины нокиан
продажа ниссан жук	toyota camry 2012 года	какой автомобиль купить	рестайлинг рендж ровер
рендж ровер 2016	ауди а1 бу	автоновости	двигатель мазда 6

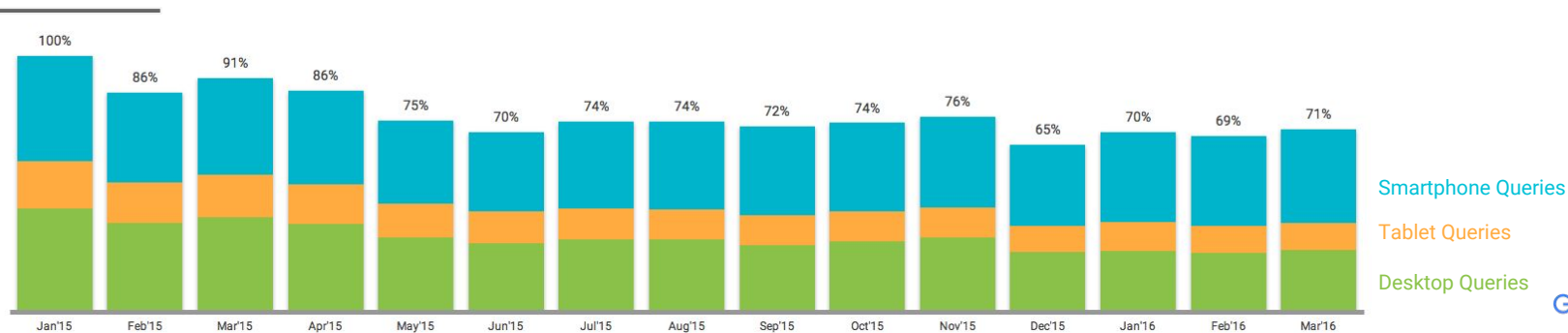
| Interest towards New cars is growing 5% QoQ and 14% YoY while used cars segment stabilised after a decline in the beginning of 2015

Indexed query growth 2015 - Q1'2016
100% = number of queries in Jan'15

New cars



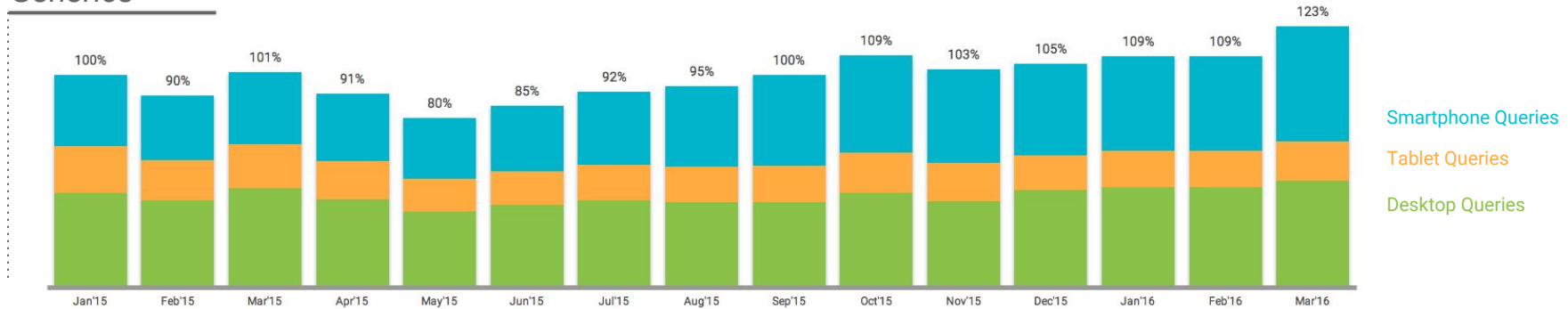
Used cars



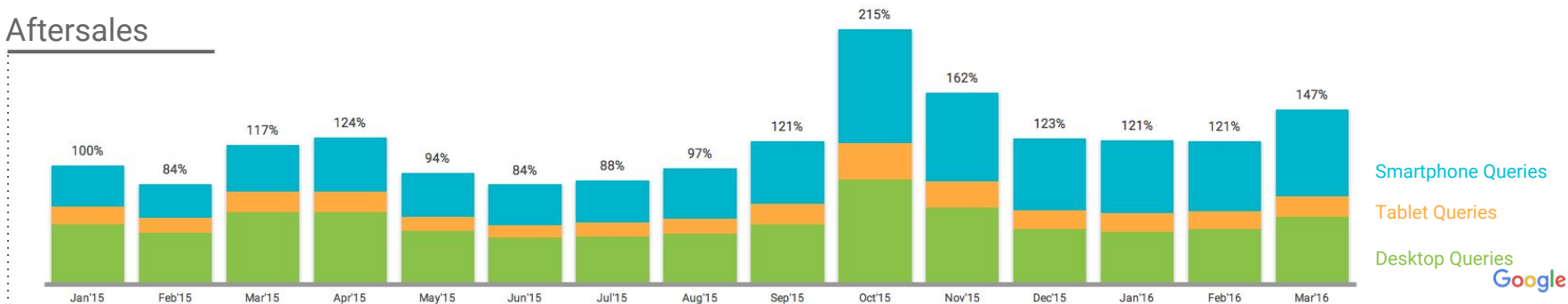
| Search queries in Generics category are growing steadily in Q1 resulting in 7% QoQ.
Aftersales category interest peaks in autumn and spring due to the rising tyre interest

Indexed query growth 2015 - Q1'2016
100% = number of queries in Jan'15

Generics

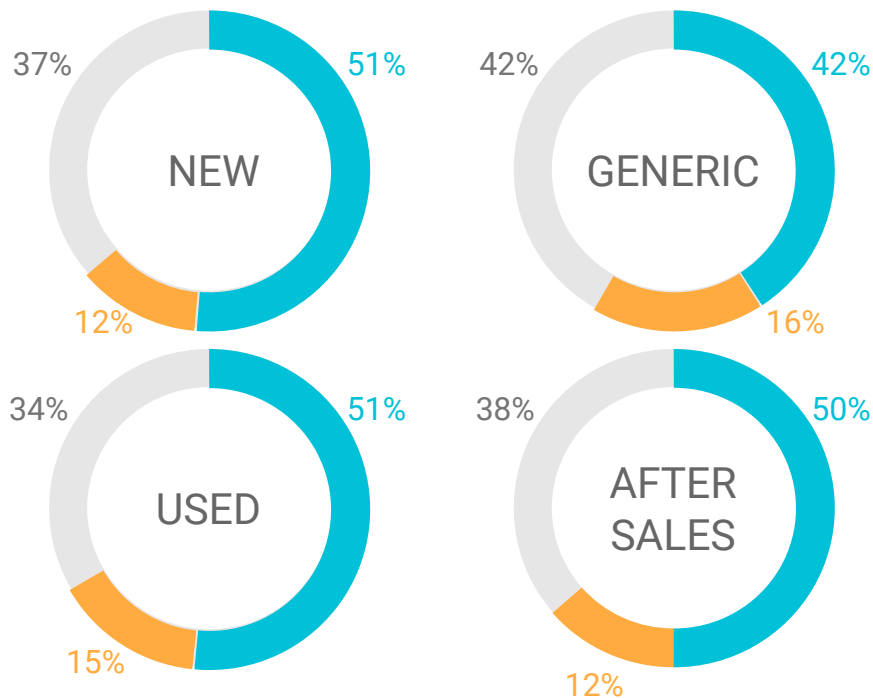


Aftersales



More than a half of automotive searches are mobile

Split of Auto-queries on Google.ru by devices, %



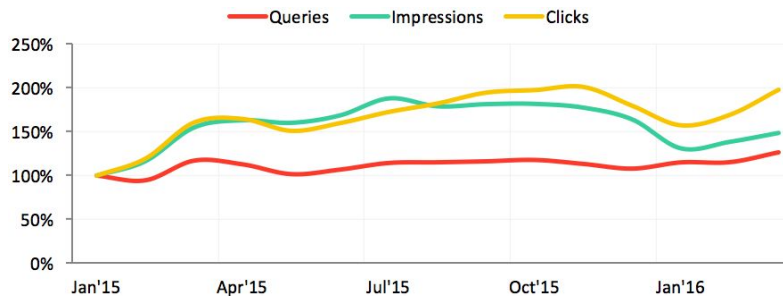
- Smartphone Queries
- Tablet Queries
- Desktop Queries

Queries and clicks in New car segment are on a rise while CPC stabilized around 20RUB. In Used car segment we see a significant increase of Clicks while the number of queries remained stable.

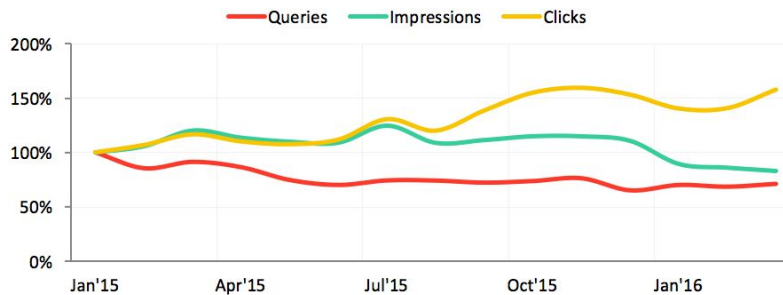
Key industry metrics growth in 2015-Q1'16

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

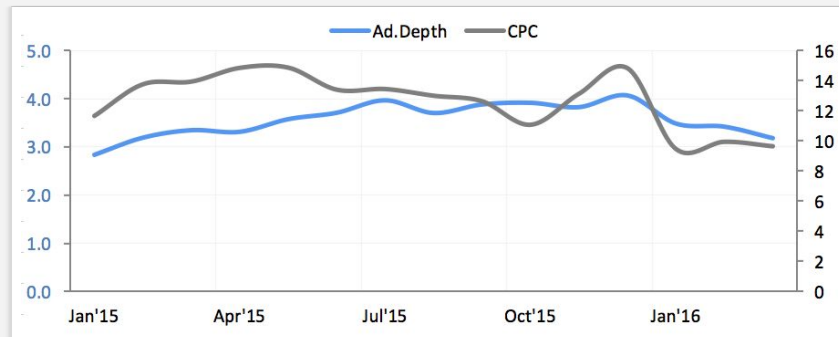
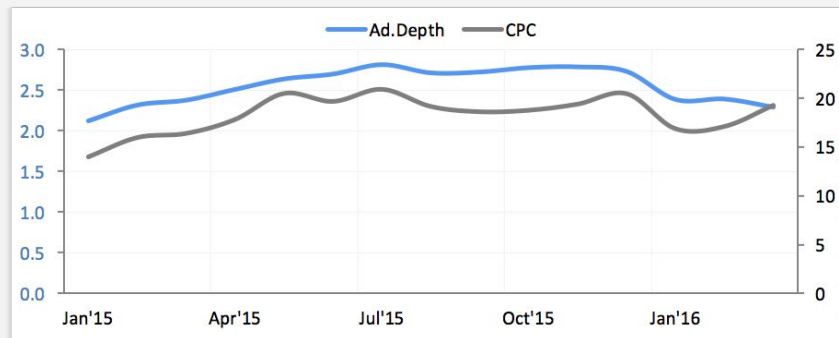
New cars



Used cars



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

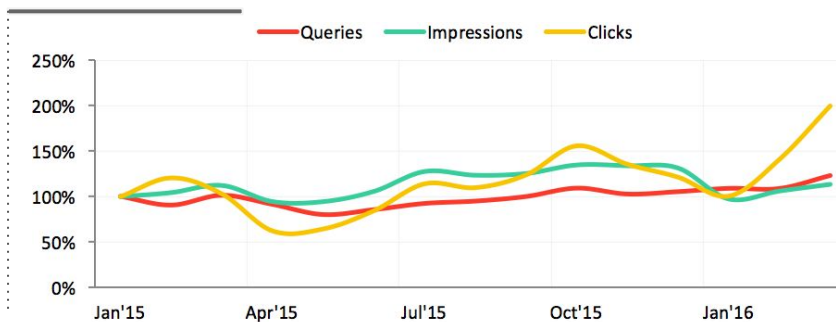


| Both Generics and Aftersales CPC went down in Q1 2016. In the meantime the number of Clicks in these categories are growing after a slight decline in January

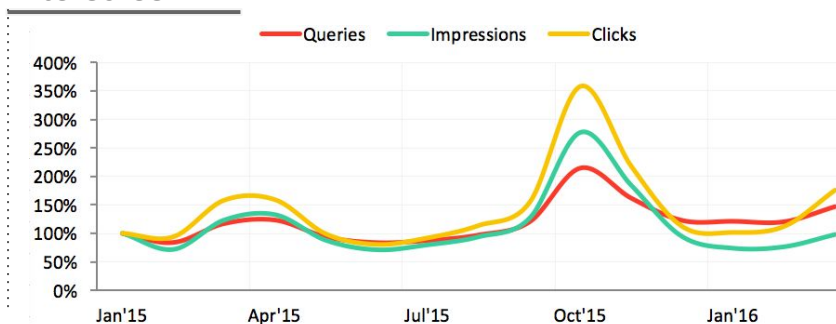
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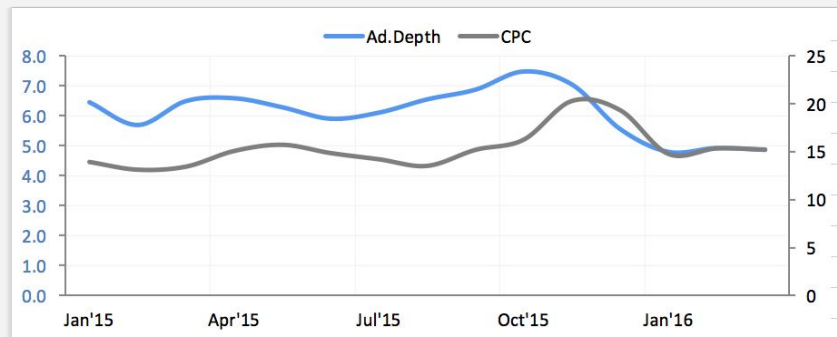
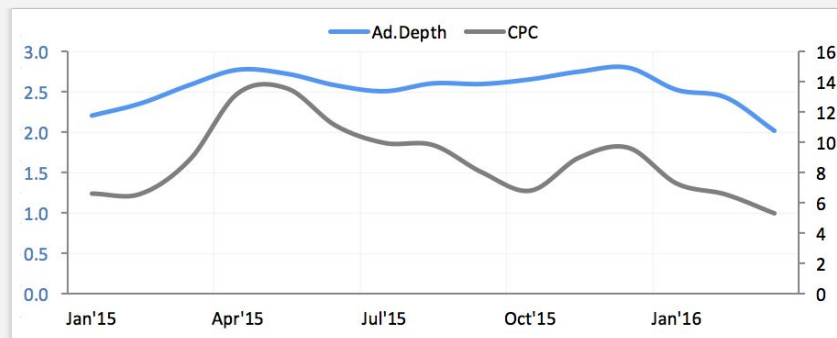
Generics



Aftersales



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

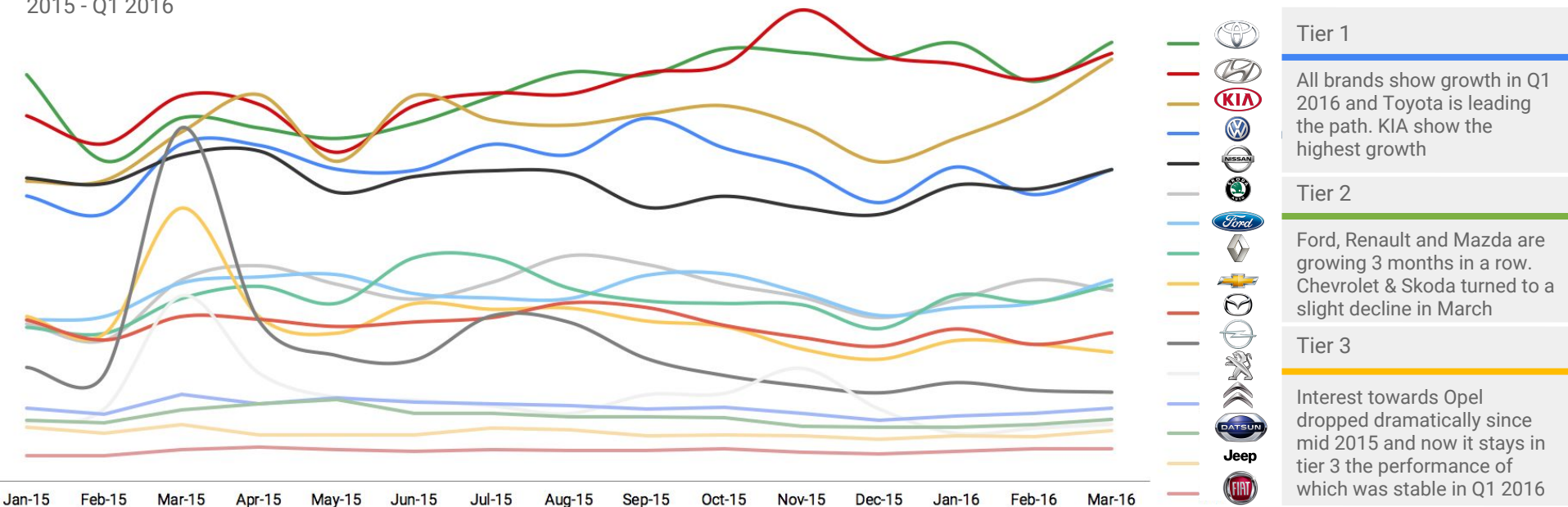


Volume and Premium Brands Performance Overview



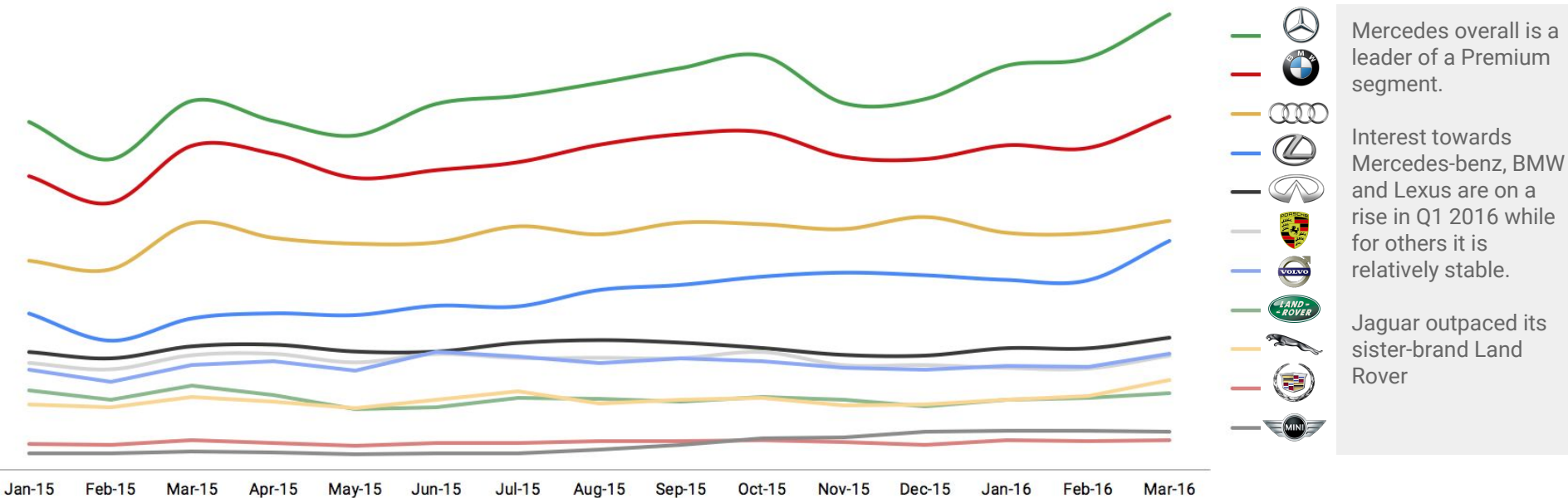
Within Mass segment Toyota outperformed Hyundai and became the leader in March 2016. Kia shows the highest QoQ growth +9%.

Monthly dynamics of branded queries in Mass segment, 2015 - Q1 2016



| Brand interest towards Mercedes-Benz, BMW and Lexus grew in Q1 2016. Nevertheless, Premium segment leaderboard positions remained stable

Monthly dynamics of branded queries in Premium segment,
2015 - Q1 2016



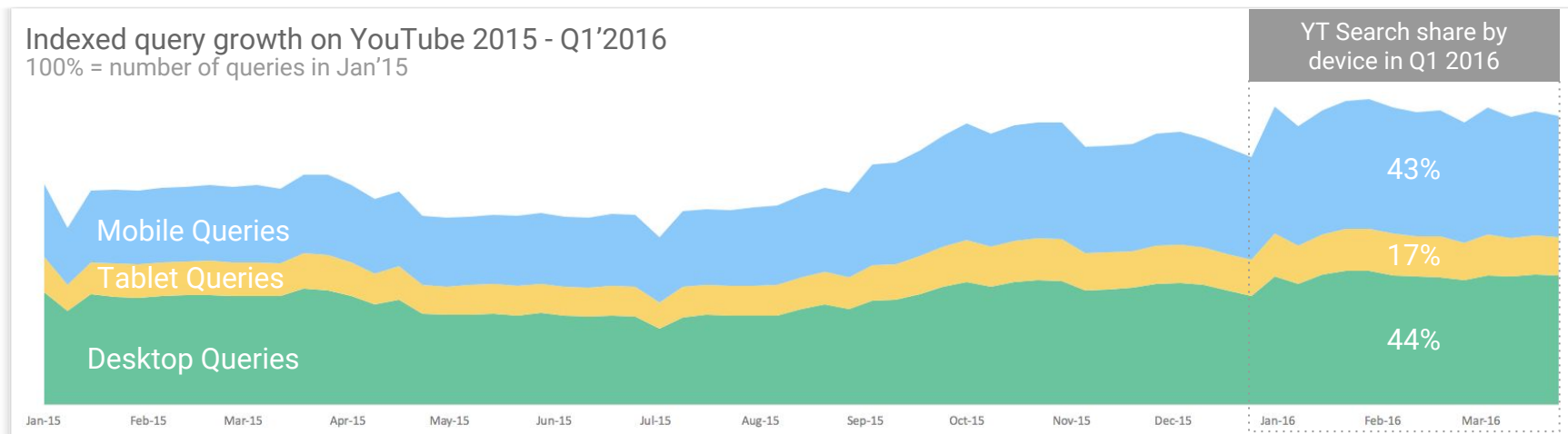
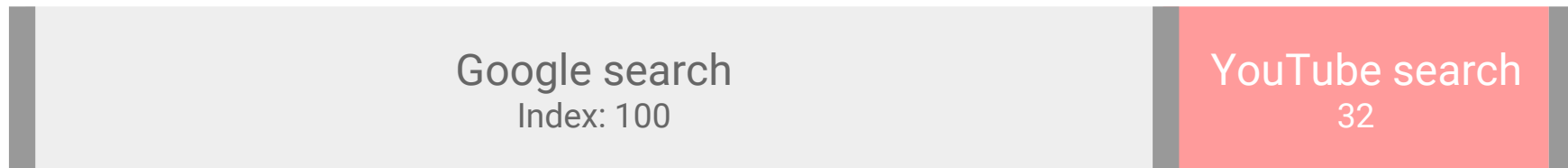
| Who leads the
automotive
conversation on
YouTube?



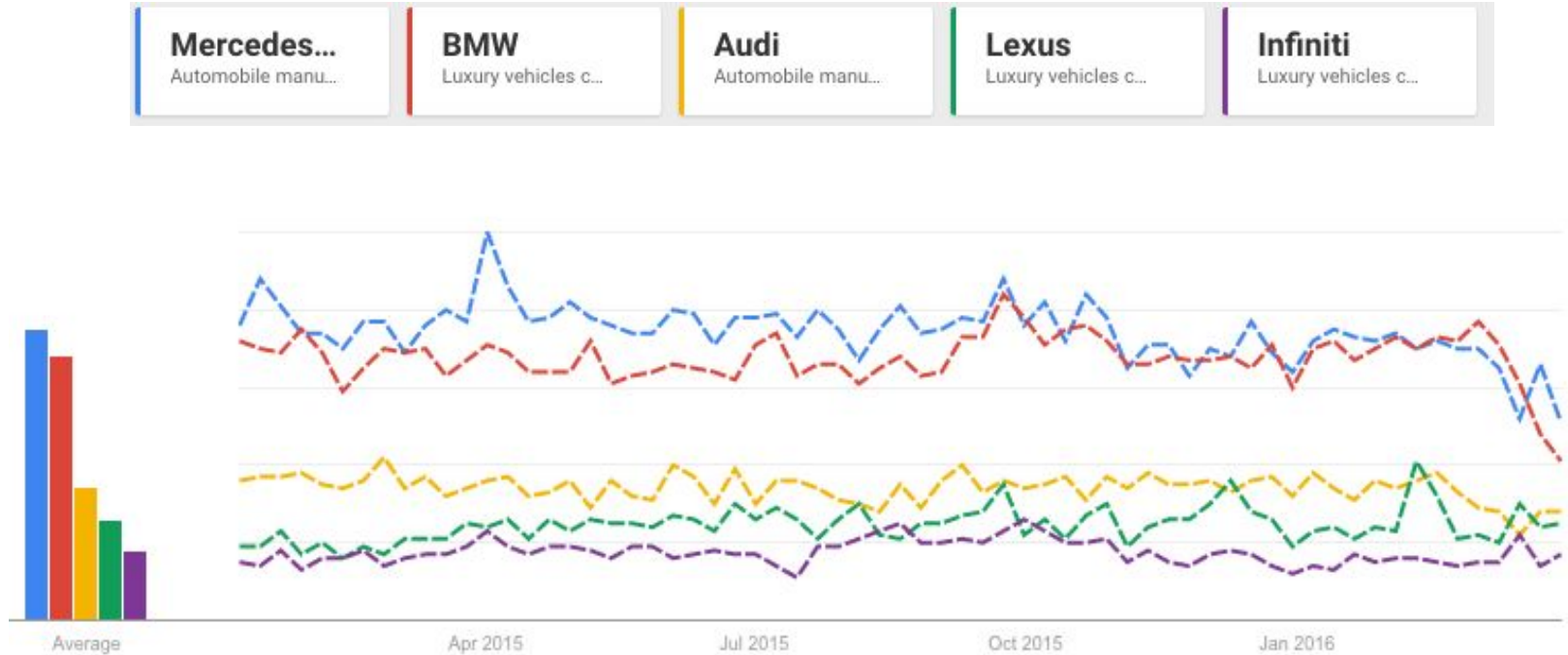
| Automotive search on Youtube is growing 42% year on year

In Q1 2016 for every 3 queries for new cars on Google Search came one query on YouTube search

Ratio of Auto-queries on Youtube search vs. Google search

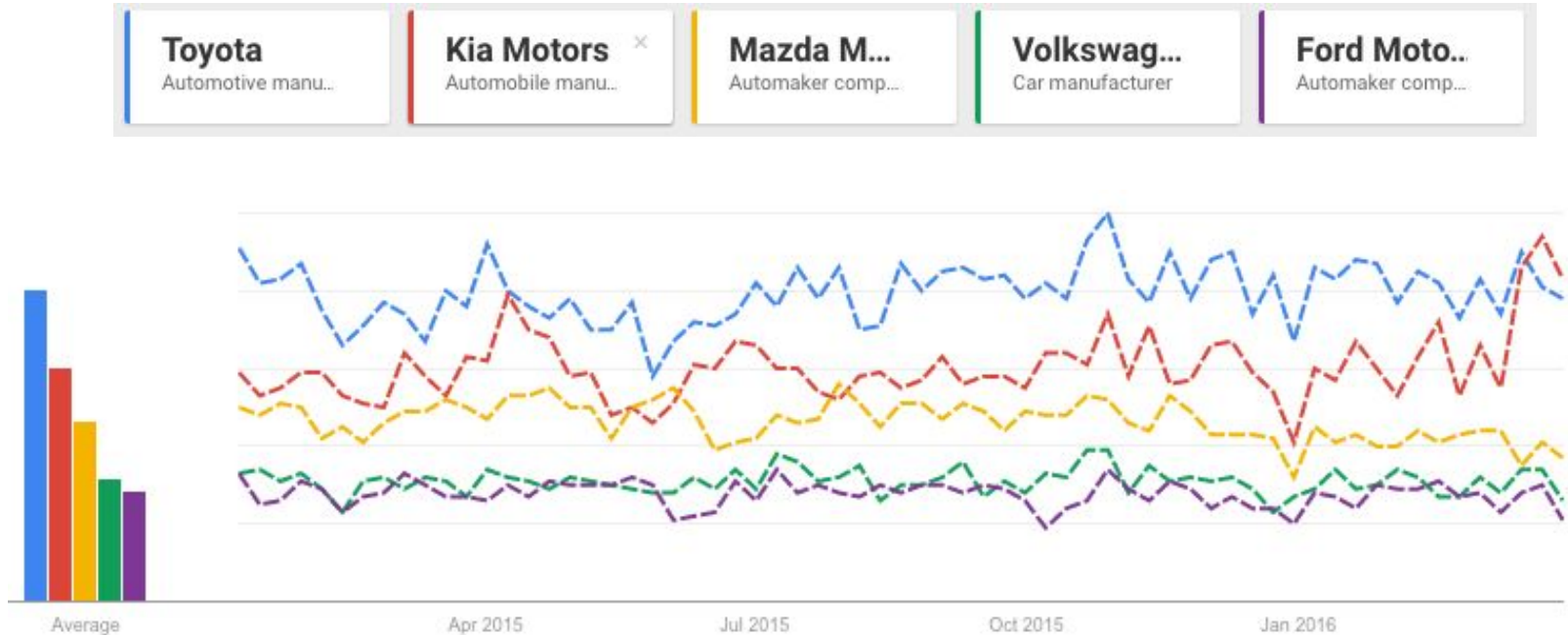


| Mercedes and BMW are leading the premium segment on YouTube Search



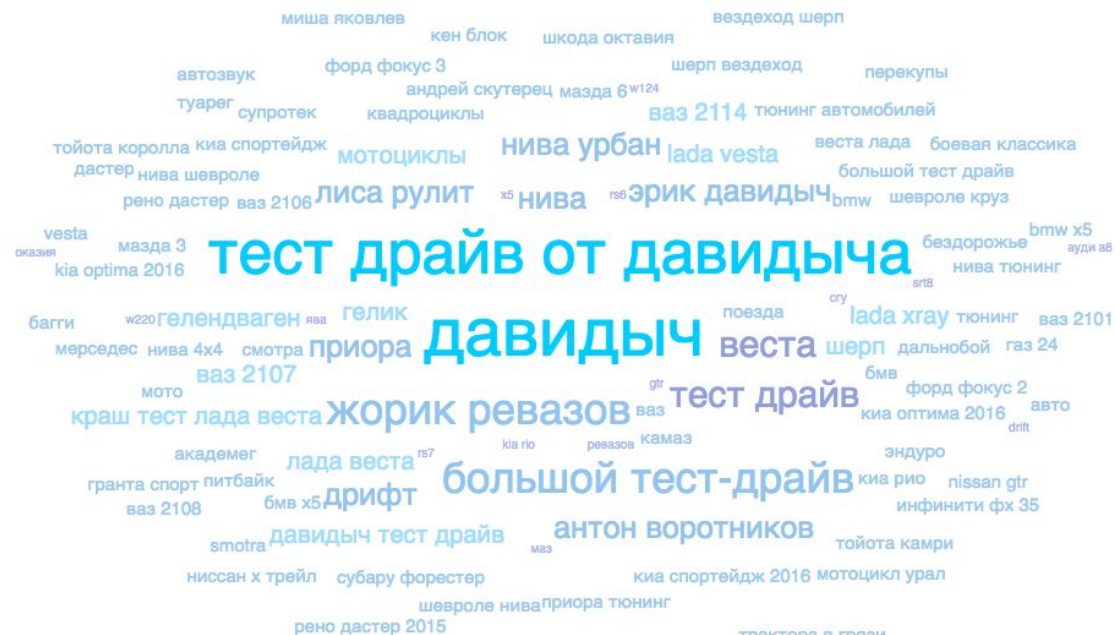
Click on graph to
explore yourself

| In volume segment Toyota was a leader for a long period of time, but Kia outperformed it in Q1 2016



Click on graph to
explore yourself

TOP KEYWORDS
USED IN Q1 2016
TO NAVIGATE TO
AUTOMOTIVE
CONTENT



| YouTube is an essential part of automotive consumer journey

53%

of new car buyers watch
online video to inform
themselves about
their purchase



| Automotive content is hugely popular on YouTube platform

Russia is #2 after US in terms of automotive content views

| 205M (+19% QoQ)

automotive views on YouTube in Russia in Q1'16

| UGC - 93%

Of all YouTube automotive videos viewed in Q1'16 93% are user-generated

| BMW | SmotraTv | KIA X-Men

The leaders on YouTube in Q1 2016



Top Brand by views
on YT in Q1 2016



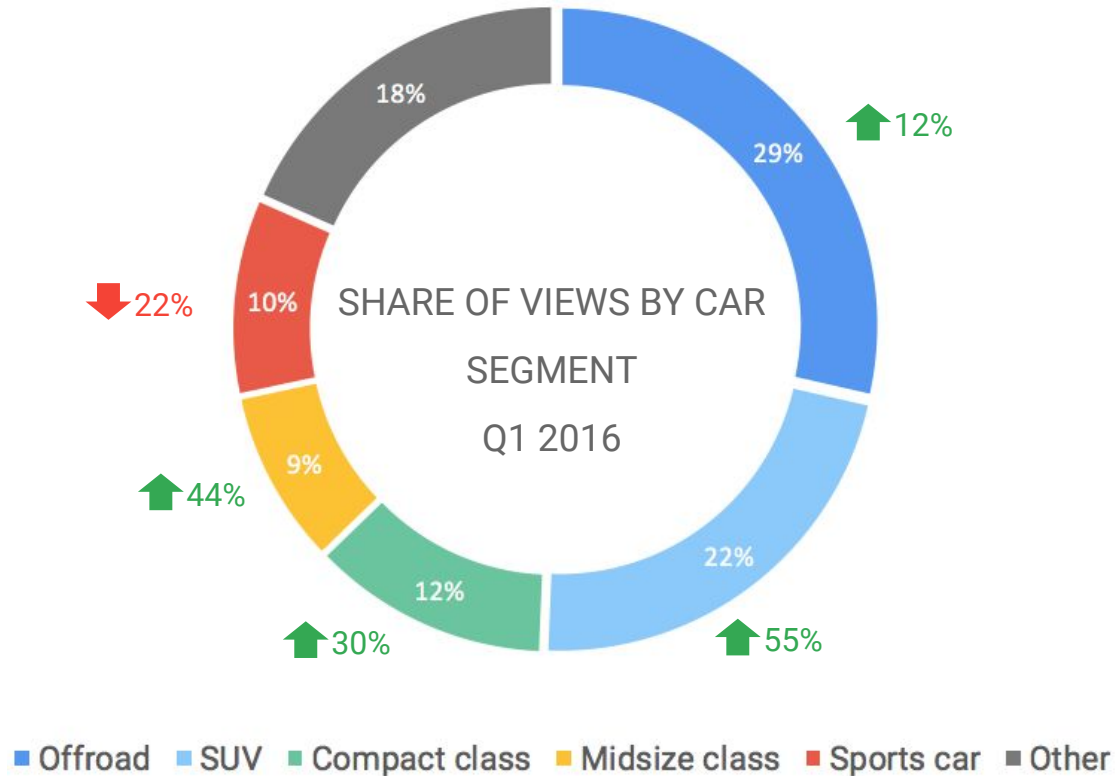
Top Channel by views
on YT in Q1 2016



Top Video by views
on YT in Q1 2016



| Off-road and SUV segments are the most popular types of automotive content on YouTube





Thank you!

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