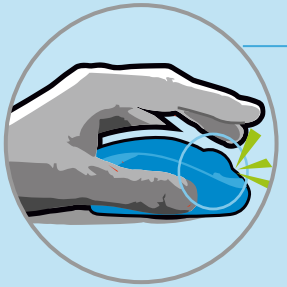
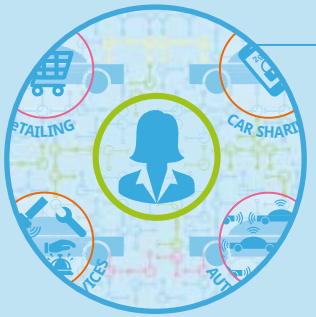
AMI
Auto Market Intelligence

Quarterly Overview Spain
2016 Q3





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Headline KPIs Spain 2016 Q3

36m +10% 2015
visits to car brand websites

€65m -4% 2015
campaign spend by car brands

250,986 +10% 2015
new passenger car registrations

146
visits / registration

€1.8
spend / visit

€256
spend / registration

Brand benchmarks Spain 2016 Q3

▲ better than average

▼ worse than average

*visits modelled on a combination of panel based traffic and brand search activity. All other data from eDataXchange.

	Brand	Visits during. quarter	Digital market share	Visits /reg.	Spend /visit	Spend /reg
1	Seat	3,150k	8.7%	194 ▼	€ 2.2 ▼	€ 422 ▼
2	Ford	2,690k	7.4%	191 ▼	€ 2.2 ▼	€ 413 ▼
3	Renault	2,582k	7.1%	136 ▲	€ 2.6 ▼	€ 349 ▼
4	Kia*	2,467k	6.8%	196 ▼	€ 0.5 ▲	€ 100 ▲
5	BMW	2,442k	6.8%	269 ▼	€ 2.4 ▼	€ 656 ▼
6	Mercedes	2,227k	6.2%	195 ▼	€ 1.6 ▲	€ 313 ▼
7	Peugeot	2,107k	5.8%	120 ▲	€ 1.8 ▼	€ 221 ▲
8	Opel	2,102k	5.8%	123 ▲	€ 1.2 ▲	€ 146 ▲
9	Volkswagen	1,794k	5.0%	95 ▲	€ 1.5 ▲	€ 141 ▲
10	Audi	1,694k	4.7%	159 ▼	€ 2.1 ▼	€ 326 ▼
11	Citroën	1,604k	4.4%	124 ▲	€ 1.8 ▼	€ 220 ▲
12	Toyota	1,502k	4.2%	112 ▲	€ 0.9 ▲	€ 106 ▲
13	Nissan*	1,466k	4.1%	117 ▲	€ 3.0 ▼	€ 348 ▼
14	Hyundai*	1,098k	3.0%	93 ▲	€ 1.0 ▲	€ 97 ▲
	Average	1,064k	3.2%	146 ◀	€ 1.8 ◀	€ 256 ◀
15	Mazda	942k	2.6%	223 ▼	€ 1.5 ▲	€ 326 ▼
16	Honda	839k	2.3%	398 ▼	€ 0.8 ▲	€ 303 ▼
17	Fiat	803k	2.2%	73 ▲	€ 3.2 ▼	€ 229 ▲
18	Škoda	682k	1.9%	126 ▲	€ 1.1 ▲	€ 138 ▲
19	Dacia*	680k	1.9%	61 ▲	€ 1.7 ▲	€ 103 ▲
20	Volvo	582k	1.6%	202 ▼	€ 0.1 ▲	€ 28 ▲
21	Porsche*	460k	1.3%	804 ▼	€ 0.0 ▲	€ 35 ▲
22	Land Rover*	336k	0.9%	185 ▼	€ 0.9 ▲	€ 170 ▲
23	Mini	291k	0.8%	134 ▲	€ 1.2 ▲	€ 159 ▲
24	Jaguar*	288k	0.8%	262 ▼	€ 3.7 ▼	€ 977 ▼
25	Mitsubishi*	279k	0.8%	129 ▲	€ 0.1 ▲	€ 18 ▲
26	Lexus	264k	0.7%	187 ▼	€ 4.7 ▼	€ 881 ▼
27	Alfa Romeo	208k	0.6%	268 ▼	€ 1.7 ▲	€ 458 ▼
28	Jeep	195k	0.5%	138 ▲	€ 4.9 ▼	€ 682 ▼
29	Subaru*	128k	0.4%	276 ▼	€ 1.6 ▲	€ 429 ▼
30	SsangYong	125k	0.3%	142 ▲	€ 0.4 ▲	€ 53 ▲
31	Smart*	98k	0.3%	86 ▲	€ 0.0 ▲	€ 0 ▲

click here to see detailed data for brands

Website performance Spain 2016 Q3

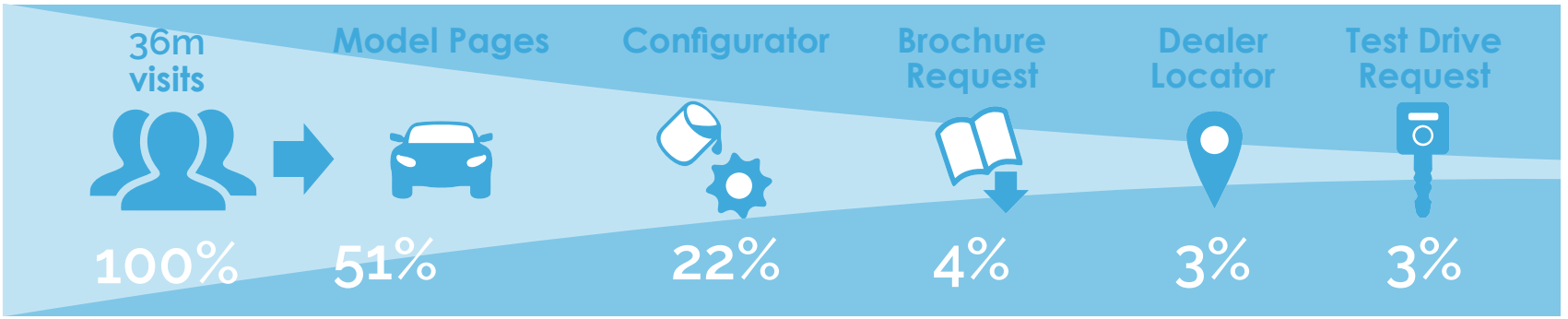
36m
website visits to car brand sites

Mobile	Tablets	PC
54%	7%	39%
2015 +13%	-2%	-11%

Online engagement

36m
market audience

Congfigurator	Brochure request	Test drive request
8m visits	1.4m visits	1.1m visits
3m completions	243k completions	18k completions



Automotive social media Spain 2016 Q3

Facebook Interactions* Q3

All car brands ES	% share interactions Q3	change from Q2
	100%	-40%
Škoda	13%	22%
Audi	12%	-4%
BMW	10%	-48%
Ford	9%	-67%
Renault	8%	-21%
Mercedes	8%	-16%
Lexus	7%	-40%
Hyundai	7%	-10%
Dacia	4%	-64%
Kia	3%	-77%
Toyota	3%	-22%
Seat	3%	-58%
Volvo	2%	-40%
Alfa	2%	-43%
Subaru	1%	-23%
Mazda	1%	-65%
Mitsubishi	1%	55%
SsangYong	1%	-34%
Honda	1%	-11%
Jeep	1%	-74%
Suzuki	1%	-19%

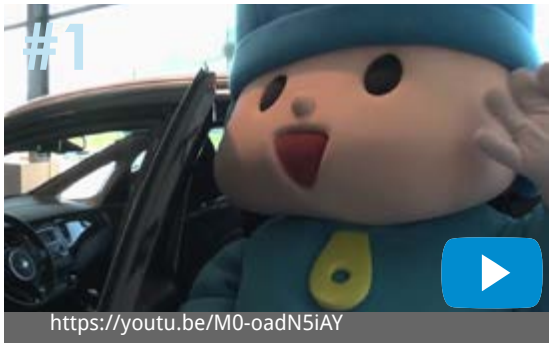
*Interactions are the sum of direct 'likes', 'shares' and 'comments' on each brand's posts during the quarter.

YouTube Views Q3

All car brands ES	% share views Q3	change from Q2
	100%	-45%
Renault	20.3%	424%
Kia	10.8%	-46%
Audi	10.0%	-8%
BMW	8.2%	-37%
Fiat	7.4%	-19%
Volkswagen	6.8%	-80%
Ford	5.9%	-2%
Skoda	5.0%	-44%
Peugeot	4.7%	1807%
Subaru	3.0%	44%
Nissan	2.6%	-81%
Toyota	2.3%	-90%
Alfa	2.1%	-41%
Citroen	2.1%	108%
Land Rover	2.0%	212%
Hyundai	1.5%	-84%
Jeep	1.2%	-64%
Mazda	0.8%	-37%
Mini	0.6%	-90%
Mercedes-Benz	0.6%	-15%
Ssangyong	0.5%	-65%
Honda	0.5%	124%
Seat	0.4%	-90%
Volvo	0.2%	47%
Lexus	0.1%	-89%
Jaguar	0.1%	-95%
Mitsubishi	0.1%	-98%

608k
Interactions
-40% Q2

14m
Views
-45% Q2



Campaign activity Spain 2016 Q3

Automotive sector spend Total Spain 2016 Q3

€65m

(**-4%** Q3 2015)

Rolling year spend

€400m

(**±0%** rolling year 2015)

Print and TV spend Spain 2016 Q3

1	Seat	€6.9m	Leon €3.4m	Ateca €2.8m	Range €.5m
2	Renault	€6.6m	Range €3.2m	Megane €1.8m	Clio €1.5m
3	BMW	€5.9m	I3 €2.6m	X1 €1.9m	Range €1.3m
4	Ford	€5.8m	Focus €2.2m	Fiesta €1.5m	Kuga €1.4m
5	Nissan	€4.4m	Qashqai €2.5m	Range €1.9m	
6	Peugeot	€3.9m	2008 €1.4m	308 €1.2m	208 €.9m
7	Mercedes	€3.6m	A Class €2.5m	GLC €.6m	C Class €.4m
8	Audi	€3.5m	A3 €3.3m	A4 €.1m	
9	Citroën	€2.8m	Range €1.5m	C4 Cactus €1.1m	C4 €.2m
10	Volkswagen	€2.7m	Polo €.8m	Golf €.7m	Passat €.4m
11	Fiat	€2.5m	Tipo €1.4m	500 €.9m	124 Spider €.1m
12	Opel	€2.5m	Mokka €1.4m	Astra €.8m	Corsa €.1m
13	Toyota	€1.4m	Auris €.9m	Yaris €.5m	
14	Mazda	€1.4m	CX-3 €1.3m		
15	Kia	€1.3m	Sportage €1.3m		
16	Lexus	€1.2m	NX €1.m	CT €.2m	
17	Hyundai	€1.2m	Range €.9m	Tucson €.3m	
18	Dacia	€1.1m	Sandero €1.1m		
19	Jaguar	€1.1m	XE €.9m	F-Pace €.2m	
20	Jeep	€1.m	Renegade €.7m	sponsorship €.2m	

Campaign activity (continued)

Top 20 Campaigns ES Q3

1	Seat Leon	€3.4m
2	Audi A3	€3.3m
3	Renault Range	€3.2m
4	Seat Ateca	€2.8m
5	BMW I3	€2.6m
6	Mercedes A Class	€2.5m
7	Nissan Qashqai	€2.5m
8	Ford Focus	€2.2m
9	BMW X1	€1.9m
10	Nissan Range	€1.9m
11	Renault Megane	€1.8m
12	Ford Fiesta	€1.5m
13	Renault Clio	€1.5m
14	Citroën Range	€1.5m
15	Fiat Tipo	€1.4m
16	Peugeot 2008	€1.4m
17	Ford Kuga	€1.4m
18	Opel Mokka	€1.4m
19	BMW Range	€1.3m
20	Mazda CX-3	€1.3m

Renault Range
https://youtu.be/_8m6yb8RIJ8

BMW I3
https://youtu.be/Yf8l4sXORo4

Seat Ateca
https://youtu.be/rnj7t0FFggs

Nissan Qashqai
https://youtu.be/1y2Omc7hrXQ

Car registrations Spain 2016 Q3

Spain passenger car registrations 2016 Q3

250,986
(+9.7% 2015)

Year-to-date

.87m
(+11.5% 2015)

Top ten movers 2016 Q3

		Registrations	Change +2015
1	Infiniti	427	311%
2	Suzuki	1,557	100%
3	Jaguar	1,101	84%
4	Fiat	11,071	35%
5	Volvo	2,884	32%
6	Hyundai	11,863	26%
7	Jeep	1,410	23%
8	Kia	12,566	21%
9	Alfa Romeo	776	20%
10	Mercedes	11,392	19%

Top ten models 2016 Q3

		Registrations	Change +2015
1	Seat Leon	7,237	25%
2	Seat Ibiza	6,410	21%
3	Dacia Sandero	6,078	9%
4	Nissan Qashqai	5,875	8%
5	Renault Clio	5,661	18%
6	Opel Corsa	5,430	85%
7	VW Golf	5,310	-17%
8	VW Polo	4,841	-12%
9	Peugeot 308	4,826	1%
10	Peugeot 208	4,613	5%

Segment shifts 2016 Q3

	Registrations	Change +2015
City Car	10,050	-10%
Supermini	45,337	18%
Compact	47,159	2%
Compact Exec	9,754	-6%
Midsize	8,010	-1%
Midsize Exec	7,619	3%
Large/Executive	2,550	12%
Luxury	180	18%
Sports	8,731	-7%
SUVs	73,823	32%
MPVs	19,436	-1%

click here to see detailed data for brands

Hypernotes

Links to some recent automotive and digital news stories

Volvo Cars and Uber join forces to develop autonomous driving cars

"The project marks a significant step in the automotive business, with a car manufacturer joining forces with a new Silicon Valley-based entrant to the car industry, underlining the way in which the global automotive industry is evolving in response to the advent of new

technologies." *Company press release.* http://bit.ly/2f42WfJ

Self-driving taxi trial kicks off in Singapore

"Earlier this year, nuTonomy was the first company to get permission from the Singapore government to test self-driving cars in a small area of the town. It's now begun tests with passengers." *BBC Business.* http://bbc.in/2f42n5N

Google Takes on Uber With New Ride-Share Service

"Google is moving onto Uber Technologies Inc.'s turf with a ride-sharing service to help San Francisco commuters join carpools, jumping into a booming but fiercely competitive market." *Wall Street Journal.* http://on.wsj.com/2f41CcJ

How Apple Scaled Back Its Titanic Plan to Take on Detroit

"Apple Inc. has drastically scaled back its automotive ambitions, leading to hundreds of job cuts and a new direction that, for now, no longer includes building its own car…" *Bloomberg.* http://bloom.bg/2f45pa9

Ford, Vauxhall, Nissan raise UK car prices after Brexit

"… are among automakers that have raised prices for their new cars in the UK in response to the pound's collapse following the country's vote to leave the European Union." *Automotive News Europe.* http://bit.ly/2f41Gtf

Nissan demands Brexit compensation deal before making UK investment

"If there are tax barriers being established on cars, you have to have a commitment for carmakers who export to Europe that there is some kind of compensation." *The Independent.* http://ind.pn/2f3Wl50

PSA's real-world fuel consumption tests for 30 core models

"Based on the European Union's Real Driving Emissions (RDE) project, the procedure measures fuel consumption by means of a portable emissions measurement system." *Company press release.* http://bit.ly/2f45wme

Ride Comfortably by Opel

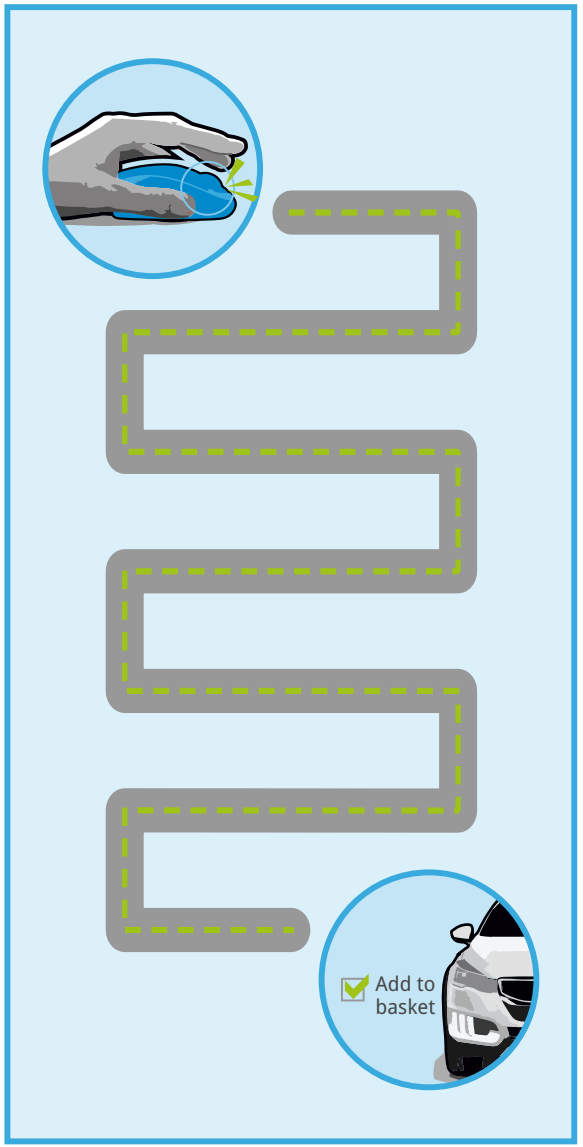
"The testosterone level among Danish men is in decline. Opel Denmark is now bringing this development to attention with the launch of Ride Comfortably by Opel – The Astra Sports Tourer Collection. This is a collection of free underwear purposed to boost men's manhood by providing them with comfort and ventilation wrapped in a modern design." *Opel DK.* (Unfortunately you need a Danish address to order a pair of free underpants!) https://youtu.be/EbbDVU2mHzU

Data

	Visits 2016 Q3	2015 Q3		Registrations 2016 Q3	2015 Q3		Ad Spend 2016 Q3	2015 Q3	
Alfa Romeo	208,000	136,677	52.2%	776	648	19.8%	355,670	137,740	158.2%
Audi	1,694,000	1,697,000	-0.2%	10,677	10,252	4.1%	3,476,056	2,316,318	50.1%
BMW	2,442,000	2,340,000	4.4%	9,066	7,938	14.2%	5,943,639	1,904,239	212.1%
Citroën	1,604,000	1,250,782	28.2%	12,907	13,482	-4.3%	2,840,365	2,382,547	19.2%
Dacia	680,000	821,000	-17.2%	11,070	10,151	9.1%	1,143,800	2,207,700	-48.2%
Fiat	802,841	490,273	63.8%	11,071	8,187	35.2%	2,531,738	3,973,087	-36.3%
Ford	2,690,331	3,170,424	-15.1%	14,084	13,170	6.9%	5,822,218	6,154,253	-5.4%
Honda	839,451	346,500	142.3%	2,109	2,073	1.7%	639,087	1,227,705	-47.9%
Hyundai	1,098,421	1,372,590	-20.0%	11,863	9,387	26.4%	1,150,835	2,078,233	-44.6%
Jaguar	288,000	257,000	12.1%	1,101	597	84.4%	1,075,615	443,621	142.5%
Jeep	194,719	212,185	-8.2%	1,410	1,145	23.1%	961,920	512,115	87.8%
Kia	2,467,035	1,685,567	46.4%	12,566	10,408	20.7%	1,253,355	1,068,524	17.3%
Land Rover	336,000	389,209	-13.7%	1,819	1,632	11.5%	308,989	68,638	350.2%
Lexus	264,000	354,000	-25.4%	1,412	1,265	11.6%	1,243,737	1,844,590	-32.6%
Mazda	941,716	926,528	1.6%	4,217	3,883	8.6%	1,376,466	1,032,816	33.3%
Mercedes	2,227,000	2,230,000	-0.1%	11,392	9,596	18.7%	3,562,063	1,551,321	129.6%
Mini	291,000	372,000	-21.8%	2,173	1,900	14.4%	346,050	-	n/a
Mitsubishi	279,000	337,000	-17.2%	2,168	2,364	-8.3%	39,500	834,143	-95.3%
Nissan	1,466,000	1,374,000	6.7%	12,526	12,092	3.6%	4,355,942	5,409,778	-19.5%
Opel	2,102,429	787,305	167.0%	17,147	15,589	10.0%	2,506,552	4,253,491	-41.1%
Peugeot	2,107,040	2,349,721	-10.3%	17,628	17,391	1.4%	3,890,020	4,044,336	-3.8%
Porsche	460,000	475,000	-3.2%	572	564	1.4%	20,075	386,097	-94.8%
Renault	2,582,000	2,433,000	6.1%	18,940	16,099	17.6%	6,615,960	5,145,250	28.6%
Seat	3,149,674	1,953,000	61.3%	16,261	14,450	12.5%	6,862,505	4,294,690	59.8%
Škoda	682,000	586,000	16.4%	5,398	5,687	-5.1%	742,750	49,475	1401.3%
Smart	98,000	122,000	-19.7%	1,140	1,058	7.8%	-	18,350	-100.0%
SsangYong	125,000	192,000	-34.9%	878	776	13.1%	46,920	333,380	-85.9%
Subaru	128,000	164,000	-22.0%	464	467	-0.6%	198,946	149,794	32.8%
Toyota	1,502,000	1,483,000	1.3%	13,359	11,670	14.5%	1,421,021	4,306,944	-67.0%
Volkswagen	1,794,000	2,090,000	-14.2%	18,855	20,318	-7.2%	2,656,214	8,481,510	-68.7%
Volvo	581,607	572,987	1.5%	2,884	2,180	32.3%	80,575	628,702	-87.2%

Advertising spend data is supplied by Ebiquity. Campaign spend for each brand/product is an aggregation of the 'rate card' cost for advertisements tracked across each medium. It does not necessarily represent the actual spend by each brand as discounts from these rates may have been negotiated. Spend values are calculated and displayed in euros.

Registrations data is supplied by IHS Automotive and is compiled from figures supplied by the relevant national governmental agencies.



CLICK TO BUY!

the car industry embraces selling online

December's AMI Whitepaper looks at why some automotive OEMs are testing the sale of cars online through their brand websites. Since the spectacular rise and fall of automotive online retailers during the dot-com boom, the received wisdom in the industry has been that buying a car online remains a bridge too far for many — however comfortable they may have become with the digital world and the online purchase of other goods and services.

Yet as the whitepaper will show, not only have consumers become more open to buying their next car online, there have also been a number of developments which remove many of the friction points within the online purchase process.

A 'new wave' of automotive e-tailers have entered the market in recent months, clearly sensing an unmet need. However, an increasing number of automotive brands — the latest being Peugeot — seem determined to keep pace with these disruptors, setting up their own online retail capabilities. The whitepaper will look at the current progress and potential of these different initiatives within the industry.

To be published: December 1st 2016

THE DIGITAL AUTO CONSUMER

How digital interaction will remain at the heart of the consumer's relationship with car brands.

FEB 23

Thursday
23rd February
2017
09:00-18:00

Henry Wellcome Auditorium
Wellcome Collection,
183 Euston Road,
London
NW1 2BE

The Sophus Forum 2017 is **free** to eDX participating members but space is limited.

Reserve your place at:
www.sophus3.com/forum/

The theme for this year's sophus3 forum is the successive waves of disruption that are reshaping the automotive market, undermining many of the industry's certainties that have persisted for decades. Digital is key to the response in every area: marketing, awareness and service delivery.

These shifts are happening more quickly than many expected. The forum will discuss the new approach of different car brands. Will they partner with digital giants, change traditional go-to-market models by selling direct, collaborate with existing mobility service providers such as Uber, innovate with data connectivity services, and invest in a 'driverless' future?

At the centre of all these approaches, is a digitally driven and ever increasing 'intimacy' with the consumer. Car brands need to offer not just a personalized car, but a personalised service and experience.

The Sophus annual eDX Forum brings together digital marketing and CRM executives of auto brands for a one day event. The objective is to share knowledge and digital marketing best practice.

We expect up to 150 delegates. Priority will be given to OEMs and their agency representatives participating in sophus' eDataXchange programme, the auto industry's digital data sharing project. If you are unsure of your membership status please contact us.

Sophus3 is at the forefront of designing and applying technology and processes that monitor consumer behavior in the online sector.

Our key strength lies in our ability to identify and gather the right data and information, combined with advanced and objective analysis. We provide expert services and support to companies in areas where they don't always have in-house expertise.

www.sophus3.com

eDataXchange (eDX) is a strategic sector and country collaborative project that monitors consumer behaviour across websites. It acts as a digital GPS of a car brand's position in the market place and enables participants to set targets, determine which digital investments are changing their market position and how.

Advertising spend data is supplied by Ebiquity.

Registrations data is supplied by IHS Automotive.

Auto Market Intelligence (AMI) is sophus3's quarterly journal of ideas and analysis aimed at e-business professionals working in, or supporting, the automotive sector. The journal focuses on innovation and developments that are impacting the sector, as well as providing a detailed review of on-going brand performance.

If you have any questions or comments we would be happy to respond if you email: contact.es@sophus3.com

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