AUTODEAL MOTODEAL

THE PHILIPPINES' NO. 1 ONLINE AUTOMOTIVE MARKETPLACE



CONTENTS



Introduction & Summary

A quick introduction to improving key performance metrics for the Philippines no.1 online automotive marketplace.



New Car Consumer Interest & Leads

We explore all data on lead volumes, lead sources and consumer interest levels.



New Car Sales & Conversion

What are shoppers buying? How long is it taking them to buy? We showcase data related to sales volumes and conversion.



Dealer Talk

We put the spotlight on best performing dealers and explore data related to dealership engagement levels.



Used Car

What have used car buyers been searching for over the last six months?



MotoDeal

What are the key trends from the Philippines no.1 online motorcycle buying website.



Inside AutoDeal

Stay up to date with all of our key metrics.

AutoDeal (The SirQo Group Inc.) prepared all the content in this report to represent the general data about online marketing in the Philippine automotive industry. This data is given in summary, and as such, all information is to be used and interpreted at the readers' own risk. Any data represented in this report should not be considered as any form of advice or recommendation. The SirQo Group Inc. will not be held responsible for any damages or loss of business caused by the interpretation of this document.

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The Road to Recovery

The Philippine automotive industry finished 2021 with a modest 18% growth. Despite the odd quarantine here and there, the year certainly felt much kinder than its predecessor; giving way to a total of 294,233 reported new car sales.

Mathematically, the 18% could simply account for a rebound from the two to three months in 2020 where dealership doors were locked, meaning that a good chunk of the improved metrics may have occurred because said doors were more frequently open in 2021. That would be a sensible enough analysis if decreased dealership accessibility as a result of the pandemic was the only adversary that the market faced last year. As it turns out, it wasn't, but more on that later.

While many brands and dealers have recently transitioned to digital sales activities; transactions still require (for the most part) a physical dealership for facilitation. While this is not the case for all sales, there are certainly more budget allocations going into digital lead-generation than there is going into better customer fulfillment processes, and for me, therein lies a problem and a potentially bigger opportunity. Without any real major innovation in the actual buying process, automakers and consumers are in a stand-off—with some dealers insisting that there's nothing wrong with the current process and consumers having little or no other choice. That is not to say I do not understand the industry's perspective, after all the allocation of resources to provide things like free home delivery need to come from somewhere, and can only be provided if greater financial efficiency is achieved elsewhere.

According to KPMG's 22nd Annual Global Automotive Executive Survey, stakeholders in the global automotive industry "foresee a fundamental change in how vehicles will be purchased. Most respondents expect the majority of vehicles to be sold online by 2030. Three-quarters also predict more than 40 percent of vehicles will be sold directly by automakers, bypassing dealers." The report further states that 53% of automotive executives are confident that profitability will improve over the next five years despite ongoing concerns regarding supply chain issues and the adjustment time required to adapt to industry 4.0 technologies.

With this in mind; a large focus for AutoDeal in 2022 will be helping our partners to not only accumulate prospective customers but to provide a seamless and consumer-centric online customer journey that will enable automakers and dealers to generate more sales at a lower cost. While 2021 achieved growth, for the sake of perspective it is important to highlight that new car sales are currently 38% lower than what they were during the industry's peak in 2017. Since then, increased excise tax and a global health pandemic have been among the strongest pressures driving sales down. While many of us might attribute this to a decline in consumer confidence, the data suggests the contrary as inquiry levels for new car purchases on AutoDeal have now returned and even surpassed some of their pre-pandemic numbers. So what gives?

As it happens, other variables have taken their toll over the last two years and have led to periodic decreases in sales conversion influenced by lower auto loan approval rates and product shortages incited by global shipping and semiconductor shortages. On top of this, there's a more crowded market which has resulted in cannibalization of sales at both brand and dealership levels. While Toyota pulled away with increased market share, seven of the top ten brands from 2017 have lost anywhere from 1 to 3 percent of their market share over the last five years. That's not to say Toyota has it easy; they sold approximately 53,000 fewer units in 2021 than they did in 2017—and did so with an increasingly growing dealer network and more mouths to feed.

For certain, everywhere, everyone continues to feel the pinch. This is why efficiency needs to take precedence. Despite all of these external factors, the automotive industry soldiers on, and all of a sudden the 18 percent growth seems a little more remarkable than what it did at first glance. Kudos to all of those who battle on.

In our 13th edition of the AutoDeal Industry Insights, we highlight the improving metrics that are helping to shine a little more light on the road to recovery.



Christopher L. Franks AutoDeal Chief Operating Officer

20 SUMMARY

AutoDeal is the no.1 online automotive marketplace in the Philippines.

▲ 14% YOY 34,099,431

Website Visits

Across the AutoDeal Network (AutoDeal & MotoDeal)

24,853

Confirmed Purchases

Tracked and confirmed from users who inquired via AutoDeal in 2021

▲ 32% YOY

326,037

Quotes & Test Drives

Serviced to dealers from buyers inquiring on AutoDeal & MotoDeal

586,622

Conversations

Back and forth messages between prospective car buyers and dealers





QUICK FACTS

Key take home points from our report

81.69%

62 Days

P

Of AutoDeal buyers shop for vehicles using their smartphone.

sold on AutoDeal in H1 2021.

C

The average industry

The Average price of vehicle

The average time it takes an AutoDeal buyer to purchase after their online inquiry.

38 mins.

P1.19M

response time of the top 50 fastest responding AutoDeal Partner Dealers.

AD

CONSUMER INTEREST & LEADS

Quotes

Test-Drives & Inquiries Leads by Market Segment Inquiring & Buying Trends Leads by Location Leads by Device Most inquired for brands AutoDeal Top 40

Quotes, Test-Drives & Inquiries

Total AutoDeal Leads Serviced to Dealers (2020 vs. 2021)

AutoDeal Leads (2015-2021)



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Leads by Market Segment

Based on AutoDeal inquiries for major vehicle categories



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Inquiring & Buying Trends

How soon are consumers looking to buy?





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2021

2020



Data Source: This data is derived from the indicated buying time submitted on all AutoDeal inquiries.

LEADS BY LOCATION

Inquiries accommodated in 2021:

1,321 **TOWNS / CITIES**

Metro Manila						
26.40%		% of Total Lead				
1	Quezon City	6.14%	-			
2	Manila	3.07%	-			
3	Makati City	2.27%	-			
4	Pasig City	2.10%	-			
5	Caloocan City	1.77%	-			
6	Taguig City	1.72%	-			
7	Parañaque City	1.67%				
8	Las Piñas City	1.62%	▼			
9	Mandaluyong City	1.39%	-			

1.07%

% of Total Leads

Muntinlupa City 10

Visayas

9.45%

1	lloilo City	1.43%
2	Cebu City	1.37%
3	Bacolod City	1.14%
4	Tacloban City	0.71%
5	Lapu-Lapu City	0.54%
6	Mandaue City	0.48%
7	Dumaguete City	0.46%
8	Tagbilaran City	0.33%
9	Talisay City	0.28%
10	Ormoc City	0.25%

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Luzon

49.32%

% of Total Leads

1	Dasmariñas City	1.71%	
2	Bacoor City	1.70%	
3	Imus City	1.70%	▼
4	General Trias City	1.64%	-
5	Antipolo City	1.46%	-
6	Angeles City	1.39%	-
7	Santa Rosa City	1.22%	-
8	Calamba City	1.22%	-
9	Baguio City	1.15%	
10	San Fernando City	1.03%	▼

Mindanao

14	14.82% 🔺		% of Total Leads	
1	Davao City	2.97%	-	
2	Cagayan De Oro City	1.89%	-	
3	General Santos City	1.05%	-	
4	Zamboanga City	0.76%	-	
5	lligan City	0.59%	-	
6	Butuan City	0.58%	-	
7	Cotabato City	0.48%	-	
8	Tagum City	0.41%	-	
9	Koronadal City	0.37%	-	
10	Pagadian City	0.32%	-	

Data Source: Based on leads (quotes, inquiries, test-drives) generated on AutoDeal.



CENTRAL LUZON: Top 20 Locations



CALABARZON: Top 20 Locations



12

2%



On Tablets

2.34% 81.69%

On Mobile Devices

15.97%

On Desktops & Laptops

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Most Inquired for Brands

How do the most popular brands of 2020 compare to 2021?





Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.



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Most inquired nameplates in 2021



% of Total Inquiries on AutoDeal in 2021

Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.

16

TOP40

#21-40



Most inquired nameplates in 2021



% of Total Inquiries on AutoDeal in 2021

Data Source: Based on leads (quotes, inquiries, test drives) generated on AutoDeal.

SALES & CONVERSION

2021 Top Selling New Vehicles New Car Conversion Timeline New Car Sales by Segment New Car Sales by SRP

TOP SELLING NEW VEHICLES

- Top Selling Nameplates on
- the AutoDeal Platform in 2021

Mid-size SUV





Subcompact Cars





MIRAGE G4

Subcompact Crossover



Data Source: Data Based on leads reported as sold by AutoDeal Partner Dealers between January 1 to December 31, 2021.

MPV



MITSUBISHI XPANDERSuzukiSuzukiERTIGAToyotaTOYOTARUSH

Commercial Vehicle





Pickup Truck





Compact Car





😪 Mazda

3

mazda



Compact Crossover



Chery Chery



Van







Foton GRATOUR

How's your timing?

Over the last two years, we've seen a consistent pattern emerging when it comes to the speed at which consumers transact.

While the months of March to August have typically shown a great number of inquiries to the rest of the year, the speed at which consumers aim to transact significantly speeds up in the fourth quarter. As a result, sales efficiency during the tail end of Q4 and the early stage of Q1 tend to get a bump up since shorter transaction times result in better customer retention and higher sales conversion for leads solely managed by dealership sales agents.

Although the current data shows acceleration in purchases shortly after pandemic lockdowns (i.e. June 2020 and June 2021), data is still consistent at indicating slower transaction times earlier in the year.

When taking into consideration this data, auto brands might be able to strategize how they can foster longterm retention from customers inquiring earlier in the year and build to a more aggressive 'buy now' strategy towards the end of it.



Mean average lead to sale conversion for sales

*Based on sales tracked in AutoDeal's Lead Management System

New Car Sales by Segment

Transaction proportions of vehicles sold on AutoDeal*



Note: This graph shows the breakdown of sales transactions recorded through the AutoDeal platform from 2017 to 2021.

New Car Sales by SRP

Despite higher interest in entry-level products; average final transaction prices continue to grow despite of higher interesting entry-level vehicles.

2021 AutoDeal Vehicle Transactions by Price Range



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Average Price of Vehicle Sold on AutoDeal (2019 - 2021)



OUTSTANDING AGENTS

New Car Dealer Industry Response Time 5 Star Agent Reviews of 2021

New Car Dealer Industry Response Time

Average Industry Response Time (2019 - 2021)



Average Industry Response Time (2016-2021)

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AutoDeal.com.ph

STARS

Here are some of our favorite agent reviews of 2021





Darz Delim Mitsubishi Motors, Global City





Awesome customer service and prompt response on all the inquiries. Bought the unit by communicating online without meeting Ms.Darz Delim. She's always attentive and suggests better options to choose from. We were hesitating to make a deposit because we haven't met her but her attitude and professionalism comforted us to trust her. She wouldn't fail your expectations. Thank you very much once again to Ms. Darz Delim for making this transaction wonderful.

Sai Kyaw

Purchased a Mitsubishi Montero Sport GT 2.4 4x2 AT



Patrick Emson Paguinto Ford, Libis

 $\star \star \star \star \star$



Emson was very helpful and professional, he went above and beyond to provide a smooth transaction and secure me the unit i wanted. He's also very knowledgable in the product and guided me through the various features of the territory after the sale had already been completed.

Jerman Sorongon

Purchased a Ford Territory 1.5 EcoBoost Titanium+ CVT



Gio Palaroan Kia, Baguio



5 stars for Gio! He listened to what I wanted, purpose of the purchase, and my budget and he gave me the best options without ever being pushy for a sale. He went above and beyond to provide me information with the best deal for what I could afford.

Amefil Kim Purchased a Kia Sportage 2.0 4x2 LX AT Dsl



Charissa Grace Pareja Nissan, Batangas City

 $\star \star \star \star \star$



Very accommodating, reliable, and adaptable in current pandemic set-up. Thought that buying a car would be stressful and tedious, but she made it hassle-free, from fast car loan approval, to delivering the unit right in front of our doorsteps. Never thought that the whole process of buying a car would be this easy.

Napolien Barcelona
Purchased a Nissan Terra 2.5 VE 4x2 AT



Rachelle Alhambra Mazda, Quezon Avenue





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Rachelle Alhambra is a very competent, warm and very professional sales executive. Had it been another person I was dealing with at Quezon Avenue Mazda, I probably chose another dealership. So owing to her, I quit calling other auto dealerships because of her engaging personality and presentation of the product. I believe she is an important asset of the Quezon Avenue Mazda when it comes to selling cars. I will refer your auto dealership to some of my friends who might be interested in your products.

Ronnie Trillana

Purchased a Mazda CX-9 2.5 Signature AWD



Roselyn Muyot MG, Congressional

$\star \star \star \star \star$



Agent is the best. She is very persuasive and will always find a way to accommodate your needs. She will never say die until you exhaust every possible options available. Highly recommended if you're looking for a new unit to buy

Kurt Ranzel Flores
Purchased a MG ZS 1.3 T Trophy



Gamil Gregorio Toyota, Manila Bay

 $\star \star \star \star \star$

ΤΟΥΟΤΑ

I was very impressed by the way Mr. Gamil Gregorio handled my inquiry. The effort, time, and patience of this person is amazing. Not only he promise me a hassle free release but he also delivered. I will never hesitate to recommend Mr. Gamil Gregorio to my friends and family. Kudos and Thank you!

Precious Espiritu Purchased a Toyota Hiace Commuter 3.0 MT





GEELY

Ms. Prynzes is very accommodating, quick to respond and transparent. She offered me a great package for my chosen vehicle and guided me on the documents needed. My transaction was very fast and smooth. She is also friendly and courteous. I highly recommend her and I'm pleased with the level of professionalism she showed. So for those looking for a quality sales agent and best deals for any Geely vehicle, she is the person to look for. Thank you Ms. Prynzes! Kudos!

Gibson Uy

Purchased a Geely Coolray 1.5 Premium Turbo

28



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Christopher Algarne Suzuki Auto, Alabang





Chris made our journey so easy in buying a new car. He was so accommodating, honest and transparent. We are looking forward to see him for the next car that we will be buying.



Rodney Rommel Gumalal Isuzu, Dipolog

Had a great experience buying our first Isuzu D-MAX pickup truck. Rodney was very helpful, the transaction was very smooth, and Isuzu Dipolog was very accommodating. Thanks again Rodney and Isuzu Dipolog for the great help.

Doki Jimeno
Purchased a Isuzu D-MAX RZ4E 4x2 LS MT

 $\star \star \star \star \star$



Catalina Porsovigan

Purchased a Suzuki XL7 GLX AT

Sheryl Sadsad Honda Cars, Quezon City





Among the dealerships and agents I contacted, Sheryl was the first to respond. The whole process from my initial inquiry was much more convenient and MUCH FASTER than I thought it would be because of the quick turnaround and Sheryl's timely responses, whether it was a complex question or a minor matter I just happened to be curious about as a first time buyer. I would highly recommend Sheryl and will definitely contact her again when it's time for an upgrade.

 Mary Grace Torralba Purchased a Honda City 1.5 RS CVT 29

ISUZU



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Raven Capada Changan, Manila Bay



СНЛИБЛИ

Very responsive and accommodating. He really helped a lot most especially with updates and follow ups needed. He sure is a great person and a great sales agent. Deserves a commendation. Thank you Raven!

Kenneth Acosta
Purchased a Changan CS35 Plus 1.4 DCT



Ria Anne Guzman Jeep, Greenhills

 $\star \star \star \star \star$

Jeep

Ms Ria is very prompt and honest. She provided a lot of assistance to facilitate the quick release of our new Jeep Compass. She even went the extra mile by delivering the unit to our house on a weekend. Thanks Ms Ria, much appreciated!

• Rogel Garcia Purchased a Jeep Compass 1.4 Longitude AT



Ima Perez Chery, Sta. Rosa



I just wanted to give a Special thanks to Ms. Ima, Ma'am Irene and all Chery Sta. Rosa Team for helping me complete with my purchase of Tiggo 5x AT Car. They're so attentive and supportive. Ms. Ayma was very helpful. She answered every questions & sent some pictures and videos as requested. The entire experience was Great. We've been transferred for twice due to our desired unit. But they guided us to the right one!! Thank you RCBC and Chery Auto Sta. Rosa. Excellent Job!

Romeo Tupas III Purchased a Chery Tiggo 5X AT

30



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USED CARS

What are Used Car Buyers shopping for?

AutoDeal Used Car Inquiries by brand

AutoDeal Used Car Inquiries by Vehicle Model Year

Used Car Inquiries by Listed Price

Top 40 Most Inquired for Used Car Models

32

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What are used car buyers shopping for? AUTODEAL Sell Your Car New Cars Used Cars News & Re Sort Q Filter Hot Deals 3075 USED CARS FOR SALE IN THE PHILIPPINES Used cars in the Philippines are sold either by a Used Car Dealer or Private Seller, AutoD... Read Mon USED CAR / FEATURED LISTING 2013 Ford Escape XLS AT P390,000 65,000 Km Automatic Gaseline

TOP20



Used Car Inquiries by Vehicle Model Year





% of Used Car Inquiries on AutoDeal (2021)



TOP40





Most inquired used car models in 2021





Motorcycle Buying, Simplified.
MOTODEAL

Join the Philippines no.1 online automotive marketplace.



E-Mail Subscribers

61.8K YouTube Subscribers

> **3,010** Instagram Followers

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	New Motorcycle Motorcycle Promos News & R		
	Q Search for a brand or model		
836,000	Search Motorcycles in		
Monthly Visits	the Philippines		
	Not too sure what motorcycle to buy? Let MotoDeal.com.ph help you by searching motorcycle brand or the body type you're interested in. You can also narrow your search		
565,000			
Monthly Unique	further by setting a price range.		
0 000 000	Make Body Type Popular Motorcycles		
Z, ZOZ, UUU Monthly Pageviews			
Montiny rageviews	aprilia aprilia B		
00.02.01	Ace Aprilia Bajaj		
OO:O2:01 Ave. Visit Duration			

CFMOTO

Harley-

38

Most Inquired Caspa YAMAHA Kawasaki CFMOTO for Brands Yamaha Honda CFMOTO Kawasaki Vespa Which brands were Suzuki online consumers drawn Motorstar Kymco to in 2021? Ducati BMW KTM Bristol Royal Enfield Keeway Husqvarna Benelli UM TVS Triumph Harley-Davidson Lambretta YAMAHI Bajaj SYM Italjet Ace Ural Piaggio Ape Indian MV Agusta Skygo Aprilia Moto Guzzi Moto Morini Beta 0% 2% 4% 6% 8% 10% 12% 14% 16% 18% 20% 22% 24% 26% 28% 30%

% of Total MotoDeal Inquiries (2021)

39

Motorcycle Quotes & Inquiries



Total MotoDeal Inquiries Generated



Data Source: Based on leads (quotes, inquiries, test-drives) generated on MotoDeal.com.ph.

40

7.0%

TOP40

Yamaha NMAX 155

CFMOTO 400 NK Honda ADV 150 Honda Click 125i Honda Rebel 500 Vespa S 125 i-get Vespa Primavera

Yamaha Mio Aerox 155

Kawasaki Bajaj Dominar 400

Motorstar Xplorer 250R Yamaha Sniper 150 Yamaha Tricity 125 CFMOTO 300SR Yamaha XSR155 Kawasaki Ninja 400 Yamaha YZF R15 155 Motorstar Cafe 400 Honda Click 150i

Keeway SuperLight 200

Suzuki Burgman Street

Kymco Xciting S 400i

Ducati Scrambler Sixty2 CFMOTO 700 CL-X Heritage Husqvarna Svartpilen 200

Yamaha Mio Sporty 115

Suzuki Raider R150

Triumph Trident 660

Honda Airblade 150

Yamaha MT-09

Kawasaki Z400

Bristol BR 400i KTM 390 Duke

0.0%

1.0%

2.0%

3.0%

4.0%

5.0%

6.0%

Honda PCX 160 Kymco Like 150i

Honda CB650R

Vespa Sprint KTM 200 Duke Yamaha XMAX 300 Honda BeAT 110 Honda CBR150R



Most inquired nameplates in 2021

INSIDE AUTODEAL

AutoDeal Group Profile

AutoDeal Video

Top 5 Most viewed videos of 2021 AutoDeal & MotoDeal

MotoDeal Video

AutoDeal Group Profile

We are the no.1 automotive marketplace in the Philippines.

			MOTODEAL	AD & MD Total
Januai	ſy	2,447,499	773,802	3,221,301
Februa	ary	2,041,015	761,231	2,802,246
March		2,038,415	797,045	2,835,460
April		1,726,228	699,762	2,425,990
May		2,128,698	750,751	2,879,449
June		2,126,768	711,792	2,838,560
July		2,081,290	771,869	2,853,159
Augus	t	2,374,393	727,311	3,101,704
Septer	nber	1,854,580	802,618	2,657,198
Octobe	er	2,180,342	889,923	3,070,265
Novem	nber	2,154,875	837,924	2,992,799
December		1,735,862	685,438	2,421,300
Total:		24,889,965	9,209,466	34,099,431
0	Instagram Followers	24.7K	3,003	
	YouTube Subscribers	341K	61.3K	
f	Facebook Followers	684K	37K	
	E-Mail Subscribers	210K		



AutoDeal Group Web Traffic (2021)

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Now the no.1 Automotive YouTube Channel in the Philippines



/ AutoDealPH

YouTube Monthly Watchtime



4,000,000

/ AutoDealPH

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45

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• • •

Total Lifetime Video Views

65,858,000

AutoDeal.com.ph

AutoDeal.com.ph is the Philippines' no.1 automotive marketplace and continuing recource. At AutoDeal we help more car buyers to

AutoDeal.com.phils the Philippines' no.1 automotive marketplace . and car-buying resource. At AutoDeal we help more car buyers L.

MEIN VIDEOS EVERY

46





341,000 Total Subscribers



MOST VIEWED VIDEOS OF 2021

2021 Isuzu D-Max Review

Behind The Wheel | Published April 9, 2021



512,800 (Joint States) 5,900 (Likes)

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Comments

Top 10 7-seaters on a budget

Behind A Desk | Published March 31, 2021



Toyota Fortuner 2.8 LTD 4x4 AT

Behind The Wheel | Published May 7, 2021







2021 Kia Stonic Review

Behind The Wheel | Published February 17, 2021







2021 Toyota Fortuner Review

Behind The Wheel | Published January 29, 2021





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Note: Video statistics are based on data from January 1 to December 31, 2021.



/ MotoDealPH

YouTube Monthly Watchtime



2021 Industry Insights

Chrome File Edit View History Bookmarks People Tab Window Help

OUR LATEST VIDEO

Top 5 Motorcycles Reviewed in 2020 in the Philippines - Behind a Desk

PH 0

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49



MotoDeal YouTube Monthly Watchtime





2020 Yamaha XSR 155 Review - Beyond the Ride 1.9M views · 1 year ago



5 Common Mistakes **Beginner Riders** Make - Behind a Desk 838K views · 6 months ago



MotoDeal YouTube Subscribers

Total Subscribers

MD

50

61,820



MOST VIEWED VIDEOS OF 2021

5 Common Mistakes **Beginner Riders Make**

Behind A Desk | Published July 23, 2021



759,300 8,100 \mathbf{O} Views

198 Comments

2021 Ducati Scrambler **Nightshift Review**

Beyond The Ride | Published June 4, 2021



4,400 **323,700** Views 144 0 Likes Comments

Top 5 Most Affordable 400cc Bikes

Views

Behind A Desk | Published February 18, 2021



Likes

Comments

Husqvarna Svartpilen 401 Review

Likes

Beyond The Ride | Published March 12, 2021







Yamaha Mio Aerox 155 Review

Beyond The Ride | Published November 12, 2021



2,200

Likes

144

Comments

51

124,000

Views

AUTODEAL

THE PHILIPPINES' NO. 1 ONLINE AUTOMOTIVE MARKETPLACE

Helping thousands of customers compare vehicles, find promos and connect with car dealers every month.

AutoDeal.com.ph

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