



cutting through complexity

Global Automotive Executive Survey 2015

Mid Year Results

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Global Sector Chair, Automotive

June 2015





Content



- I Report Overview**
- II Digital Media Results**
- III Social Media Results**
- IV Press & Media Results**
- V Country Adoption**
- VI Events & Recap**



KPMG's 16th annual automotive survey



Executive summary

- The Global Automotive Executive Survey is KPMG International's annual assessment of the current state and future prospects of the worldwide automotive industry.
- The 2015 report is the 16th annual survey; 200 senior executives from the world's leading automotive companies were interviewed, including automakers, suppliers, dealers, financial services providers, rental companies and mobility solution providers.



Content



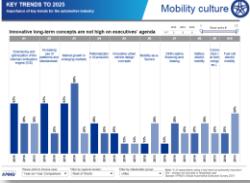
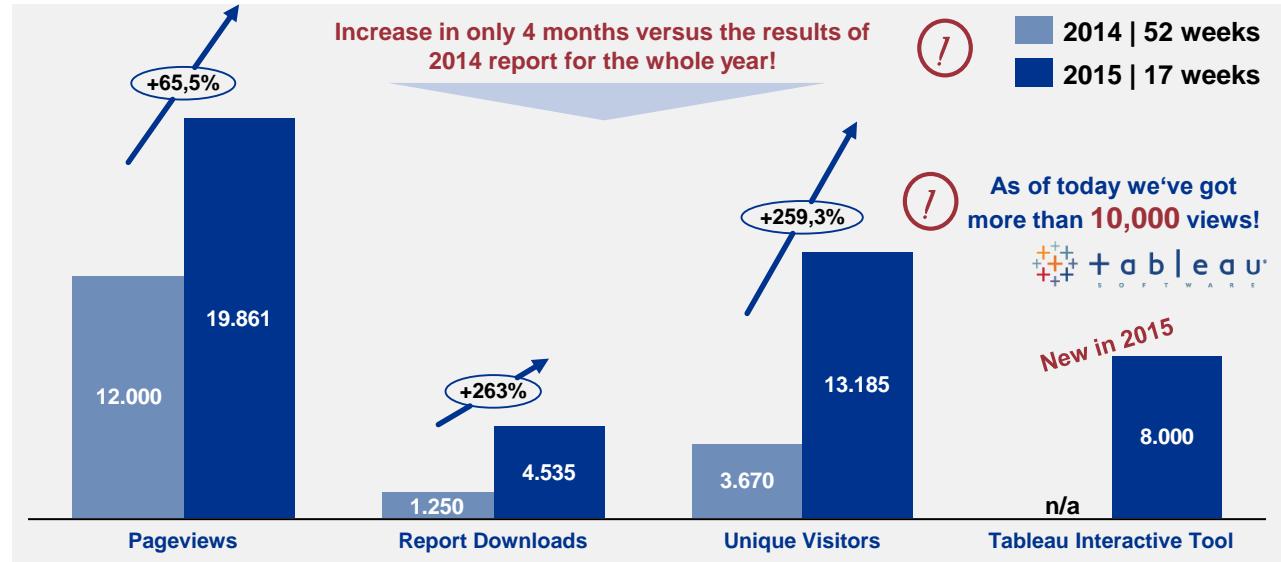
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KPMG Global Website



Tableau Interactive Dashboard 

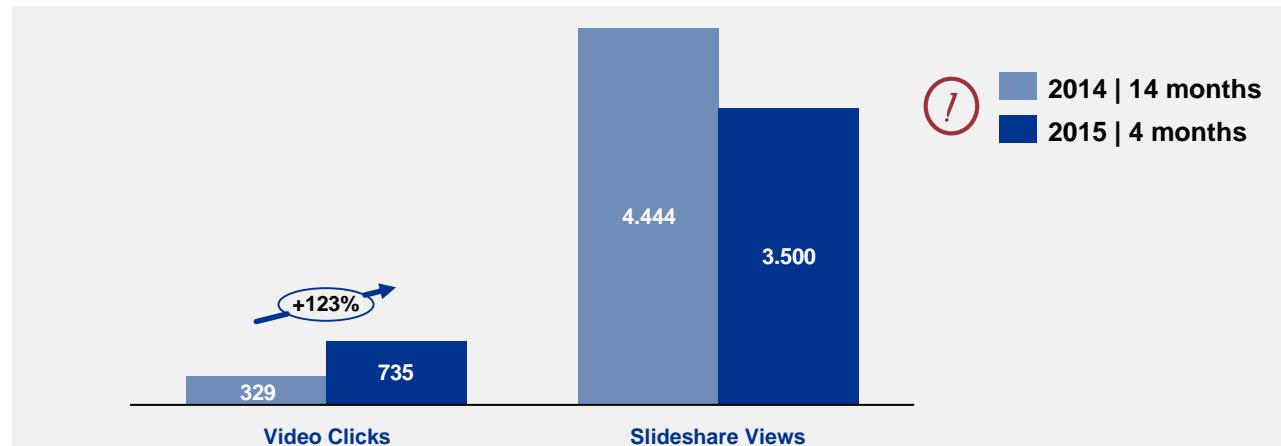
Infographic



Slideshare



Video





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Highlights

- There were 397 mentions of the GAES between 7 January – 7 April, 2015
- The net sentiment of these mentions was +2% (up from 0% in 2014)
- In terms of sources, Twitter dominated with 86% share
- For the first time Google+ has had a noticeable impact, at 3%
- The mentions of this report were primarily driven by the tweets sent by KPMG Global

KPMG In the e-vehicle market, plug-in hybrids will attract the highest demand over the next 5 years.
<http://bit.ly/1EPjWu>



Like (111) · Comment (1) · Share · 1 month ago

Alison McDonald, Tianqi Huang 489
 Kathryn Simons Baja-Mitteman have not been excited about vehicles relative to past generations. However, they are excited about electric cars (especially Tesla). If car manufacturers want to woo this massive consumer group, they should lead with an exciting all... more 1 month ago

Bard Kirkegaard Tesla Motors-When battery capacity is better, hybrid is out. the most popular place in Norway is Tesla Motors China 中国特斯拉. And I want one. we all do! Tesla is on a project to go supersonic with train, how awesome isn't that? 1 month ago

Sharmi Sehal Thank you for your interest in this study Kathryn and Bard. As part of the Tesla account team at KPMG, we follow their activities and progress very closely and are very optimistic that the improved technology and specialty the affordability of the future models will further increase the popularity of Tesla amongst the younger age brackets. less 20 days ago

Add a comment...

Results

Social Channel	Posts Sent	Engagement Rate * (shares, likes, comments, replies)	Impressions (Eyeballs on GAES posts)
LinkedIn	11	677	825,000
Facebook	18	330	329,683**
Twitter	2	66	17,953
Google+	11	40	N.A.

* Engagements refers to comments, shares, likes, retweets, favorites

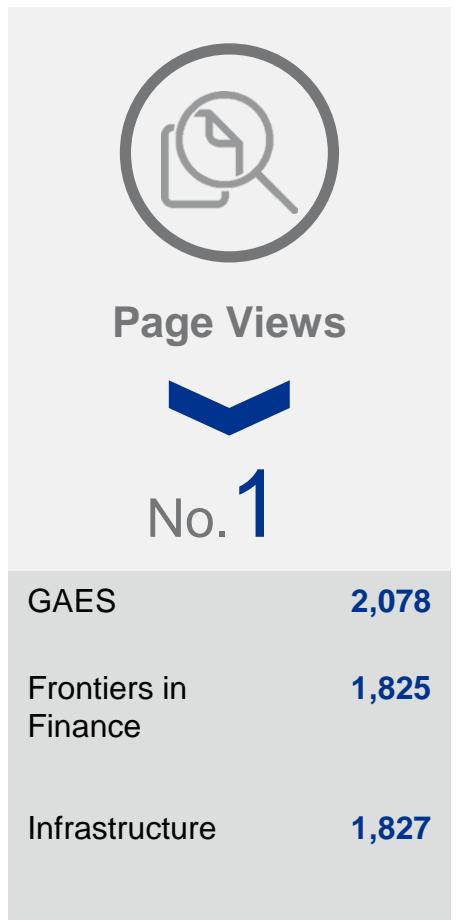
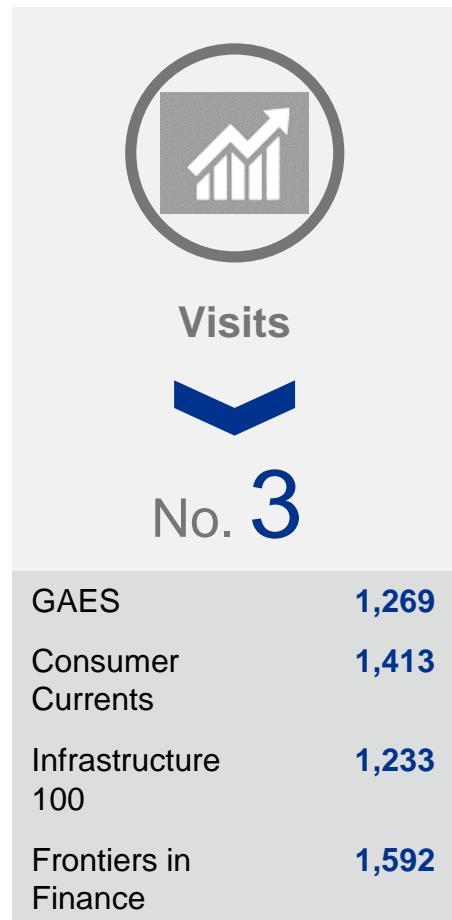
** Retweet impressions

Note: In 2014 there was no investment in social media





Ranking in the top 3 global digital & social media campaigns in Q2





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Press Coverage



2 JANUARY 2015



Delhi | Mumbai | Kolkata | London



Die BRANCHEN- UND WIRTSCHAFTSZEITUNG



Small is the way to go: KPMG's Global Automotive Executive Survey 2015

India Infoline News Service | Mumbai | January 08, 2015 12:46 IST



- Global Automotive Executive Survey 2015 is the **top global thought leadership initiative for KPMG** for the first two quarters of FY15
- It was the second most-visible automotive thought leadership initiative among the Big 4
- The survey was covered in 24 countries, led by 181 items carried by news outlets in Germany, with the remaining top 10 countries in terms of volume of coverage including: India (43 items), China and Hong Kong (28 items), Spain (19 items), Canada (12 items), Austria (9 items), Netherlands (8 items), Slovakia (8 items), South Korea (8 items) and the United States (7 items)
- High-profile coverage in Canada, China, Germany, India, Japan, Netherlands



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GAES 2015
A truly global effort

United States 

NAIS, Detroit (Jan),
2015 Auto Summit, NC(Feb),
full marketing campaign including
social media investment and
webcast, new 'On Your Agenda'
series

Brazil 

Key Client distribution printed
copies PR/Media campaign

Canada 

Full marketing/PR campaign
launch for the Canadian
International Auto Show

Germany 

Press conference, external web
launch/PR/Media, client meetings
(Audi, Porsche,VW)

Norway 

PR/media campaign

United Kingdom 

Client event (SMMT Driving the
Motor Industry)and mail out

Kazakhstan 

Economic Forum in Astana May
2015
Translation/ launch/ mail out

China 

Auto Shanghai 2015

Japan 

Japanese Translation and PR
campaign launch (May 2015)

India 

PR/Media campaign

Spain 

Client breakfast meeting series

Czech Republic 

Full marketing/PR campaign
launch, translated report

Indonesia 

South East Asia Automotive
Technology Summit, Jakarta



Brazil

Client Distribution

Distribution to 590 clients
 300 hard copies of the study were sent to the chief executives of leading companies such as GM, Ford, VW, Fiat, Daimler, BMW, Audi, Kia, Hyundai, Nissan and Renault, as well as important regulatory institutions in the sector



Priority Media

10 media outcomes in high profile media

KPMG Brasil
 Compartilhada publicamente - 9 de jan de 2015
 #Carros
#PesquisaKPMG Qual o futuro do setor automotivo?
 A Pesquisa Global do Setor Automotivo entrevistou 200 grandes executivos do setor para responder à pergunta. Confira nosso vídeo.
 #Automotive #carros #perspectivas
<https://www.youtube.com/watch?v=2mHQj5Vtzs&feature=youtu.be>

Social Media

- Facebook
- Google +
- LinkedIn
- Twitter



KPMG Brasil Qualas são as empresas do setor automotivo que estão mais propensas a ganhar participação de mercado até 2020? Hyundai/Kia? Volkswagen? A KPMG disponibiliza uma nova ferramenta para você conferir os principais resultados da nossa pesquisa anual sobre o setor automotivo. Confira: <http://migre.me/0s1my> menses



Organicas
 Direcionada para: Todos os seguidores
 11.618 impressões 28 cliques 28 interações 0,48 engaj.
 Petionar atualização
 Gostei (27) Comentar (1) Fixar no topo 1h atrás
 Martiniano Lopes, José Carlos Alves Simões +1
 Erica Carvalho Vittorazzo Márcio Vittorazzo 1m atrás
 Adicionar comentário...
 Confira: <http://migre.me/0s1my>
 Mostrar menos

KPMG's Global Automotive Executive Survey 2015 - Interactive Dashboard
 migre.me

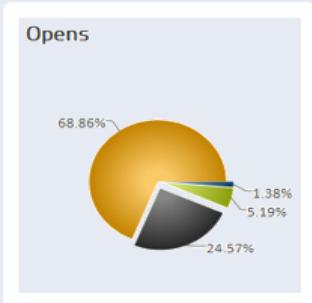




Czech Republic

Client Distribution

- Distribution to 501 clients
- High open rate 69%



13 client leads from campaign to date, including:
Allianz Assistance, Škoda Auto and others

Priority Media

- 12 media outcomes, 6 in high profile media
- Article in MF Dnes
- Interview with CT24



Jan Linhart, Head of Auto, Czech

Social Media



Other Media

Czech website & Report translated into Czech





Germany

Client Distribution & Meetings

- Hard copies sent to key clients
- Webcast on April 29, 2015 (+300 attendees globally)



Meetings with Audi, Porsche and VW

Press

- Press conference with 12 prestigious publishing houses e.g. *dpa*, *Die Welt*, *Bloomberg News*, *Handelsblatt*, *Dowjones*, *Reuters*
- 181 media articles
- Germany received most media hits globally
- Online banner ads in renown pubs
 - www.Automobilwoche.de: Newsletter Content Banner (Recipients: 160.000)
 - www.Handelsblatt.com: Newsletter Skyscraper Banner (Recipients: 2.000.000)



Social Media

Facebook:

5K Clicks

Google AdWords:

+2K Clicks

LinkedIn:

220 Clicks



Other Media

- +4K clicks website
- +7K clicks KPMG news site





United States

Client Distribution

- Website leverages global report
- Investment in paid social media campaign
 - (GAES highest click through rate of all US campaigns to date)
- Webcast on April 29, 2015 (+300 attendees globally)
- Hosted client events
 - e.g. North American International Auto Show - Detroit, Automotive Summit - South Carolina)
- 'On your Agenda' featuring report content



US GAES launch website

SHARE THIS PAGE:

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FIND OUT WHAT KPMG CAN DO FOR YOUR BUSINESS
► [SUBMIT AN RFP](#)

 **GLOBAL AUTOMOTIVE EXECUTIVE SURVEY**

The Global Automotive Executive Survey is KPMG International's annual assessment of the current state and future prospects of the worldwide automotive industry. In the 16th annual survey, 200 senior executives from the world's leading automotive companies were interviewed, including automakers, suppliers, dealers, financial service providers, rental companies and mobility service providers.

 [1.6 MB](#) ► [DOWNLOAD](#)

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Client Events

Canada

- Canadian International Auto Show 2015

China

- Client meetings, Shanghai, April 2015

Indonesia

- South East Asia Automotive Technology Summit

UK

- SMMT Driving the Motor Industry 2015

US

- Auto Webcast: Results of KPMG's Global Automotive Executive Survey 2015
- Detroit Auto Show Automotive Summit, South Carolina

South Africa

- GAES 2015 launch client event, high profile press coverage

Spain

- Client Breakfast meeting series 2015

Switzerland

- World Economic Forum 2015, Davos – client meeting



Country Adoption Recap

- +3,500 hard copies ordered by 17 countries
- 8 external client events in key markets
- 5 customized country versions with full marketing campaigns/launches: Czech, France, Korea, Japan, Turkey



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DISCLAIMER

The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavour to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

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