



brandwatch

Social Insights/

The Automotive Industry



1.0 An Outlook on the Automotive Industry

To say that the automotive industry is undergoing an era of digital transformation would be redundant – businesses that have not recognized and adapted to new technologies may already be irrecoverably outpaced by their earlier-adopting competitors.

The evidence supporting this transition abounds: in the next ten years, 40% of new car buyers will be millennials, of which up to 94% gather purchasing information online. Furthermore, 38% of consumers consult social media before a car purchase and at least 40% convey a positive or negative experience on social.

Certainly, the ability for brands to connect to millennials affects both automotive brands' current business and their future security.

On the whole, the industry is moderately mature when it comes to engaging on social media. Most businesses are effectively conveying their identity through social posts or campaigns and are fairly consistent in their messaging to audiences. Yet not all brands are capitalizing on the full benefits of social data.

Only some of the larger, more mature automotive businesses are implementing robust social intelligence programs, which may provide social insight to sales, marketing, public relations, and even engineers and designers. By informing their business decisions by consumers' opinions and ideas, these brands ensure that they not only react and adapt to millennials' changing preferences, but are also able to assess the future direction of those preferences.

And undoubtedly, there are many technologies contending to radically change the industry: hybrid and electric vehicles, self-driving cars, car sharing services and mobile ride hailing services. Of course, automotive businesses should be wary of how interest in such technologies could affect their brand, but they should also take note of people's opinions on the style, comfort, reliability, mileage, safety and overall performance of their and their competitors' cars – social media can offer organic, real-time feedback on these issues.

Automotive businesses that are powered by social intelligence and more aware of their consumers' preferences will have a competitive edge, preparing for the effects of technology and changing preferences. In doing so, they are better ensuring their security in the long-run.



Graham Wall/
Automotive Sector Lead at Brandwatch

¹ Deloitte. *Fourth Annual Gen Y Automotive Survey*. January 2012.

² eBay Motors Research.

³ GfK Automotive Research & Driver.com *The Rise of Loyalty, Advocacy & Influence*. January 2012.

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2.0 Aim & Methodology

The following report aims to provide automotive brands with an understanding of the current online landscape, actionable competitive benchmarks, and several specific insights on car models and technologies. The analysis is divided into six main sections:

- 1. The Automotive Social Index:** Provides a comprehensive ranking for 48 brands across five key factors: Social Visibility, General Visibility, Net Sentiment, Reach Growth, and Social Engagement & Content.
- 2. The Brand-Audience Relationship:** Explores the way brands communicate with their audiences and how audiences receive that content
- 3. A Look at Automotive Audiences:** Examines the gender, interests and professions of automotive audiences at the industry and brand level.
- 4. Associated Adjectives Analysis:** Uncovers the language that audiences use to describe eight unique brands.
- 5. A Look at Hybrid Vehicles:** Briefly reviews the volume of conversation and leading brands around hybrid vehicles.
- 6. A Look at All-Electric Vehicles:** Briefly explores the share of voice for five leading all-electric vehicles and specifically compares Tesla's Model S against BMW's i3.

The data and insights are derived through enterprise social intelligence software Brandwatch Analytics. The analysis examines 48 automotive businesses across the globe. Data is collected through three formats:

- 1. Queries:** Collects general mentions of a brand online. Brandwatch Queries, based on boolean operators, are completely customizable to filter out spam or irrelevant conversations.
- 2. Twitter Channels:** Collects Twitter data based on specific brands' accounts. Twitter Channels track @ mentions, replies, retweets, and followers directed at selected Twitter accounts.
- 3. Facebook Channels:** Collects Facebook data based on specific brands' accounts. Facebook Channels track likes, posts, comments, shares, and pages likes on selected brands' Facebook pages.

For further questions on the aim, methodology or analysis in this report, please contact Brandwatch directly.

3.0 The Automotive Social Index

The Automotive Social Index offers a context from which brands can benchmark specific factors of their online presence against competitors.

The index evaluates 48 brands across five specific attributes:

- **Social Visibility:** measures the volume of conversation a brand generates across key social channels.
- **General Visibility:** measures the volume of conversation a brand generates on blogs, news outlets and forums.
- **Net Sentiment:** evaluates the composition of negative and positive mentions of a brand in the context of that brand's entire conversation.
- **Reach Growth:** measures the growth of a brand's following over the course of a month, appropriately weighted according to the brand's current following.
- **Social Engagement & Content:** evaluates how effective brands are at communicating or responding to their audiences and how well their social content is received across social channels.

The Composite Score reflects a brand's performance across the five categories. For all five categories, brands are normalized against a single leader, which receives a score of 100. As such, the maximum potential score is 500.

Brand	Rank	Social Visibility	General Visibility	Net Sentiment	Reach Growth	Social Engagement	Composite Score
Lexus	1	100	48	69	50	100	367
Honda	2	63	71	100	49	75	358
Audi	3	70	43	100	50	75	338
Porsche	4	76	59	72	50	64	322
Tesla	5	65	64	59	56	73	317
Dodge	6	83	65	51	47	65	311
Jeep	7	75	50	75	47	58	304
Ferrari	8	77	57	67	56	46	303
Ford	9	63	100	55	48	36	303
Mercedes-Benz	10	84	53	74	50	38	299
Rolls-Royce	11	55	44	84	49	67	299
Volkswagen	12	48	64	54	100	28	294
Citroën	13	23	39	66	76	89	293
BMW	14	76	76	59	45	33	288
Maserati	15	69	34	79	50	55	286
Toyota	16	63	72	64	47	37	283
Jaguar	17	61	49	86	49	37	282
Skoda	18	47	39	79	68	46	278
Subaru	19	68	44	84	44	36	276
Vauxhall	20	23	43	61	63	87	275

Brand	Rank	Social Visibility	General Visibility	Net Sentiment	Reach Growth	Social engagement	Overall Score
Kia	21	84	48	61	43	36	272
Renault	22	47	55	52	73	43	270
Nissan	23	39	63	56	44	53	255
Alfa Romeo	24	48	32	69	69	36	255
Chevrolet	25	52	54	63	47	35	252
Cadillac	26	54	49	69	46	31	250
Lincoln Motors	27	50	76	56	38	28	247
Chrysler	28	52	51	61	45	38	246
Ram	29	75	21	65	44	40	245
Volvo	30	46	50	77	43	29	245
Dacia	31	19	28	59	63	68	237
Hyundai	32	58	55	51	45	26	235
GMC	33	52	46	56	45	34	232
Mazda	34	48	46	66	43	26	229
Land Rover	35	39	45	62	48	33	227
Suzuki	36	30	48	69	38	41	226
Mini	37	28	55	73	42	28	226
Fiat	38	45	54	56	42	27	224
Buick	39	46	40	66	44	27	224
SEAT	40	30	28	69	60	34	222
Acura	41	58	35	61	43	18	215
Infiniti	42	44	35	62	41	31	213
Peugeot	43	31	40	71	45	23	209
Mitsubishi	44	35	49	62	41	21	208
Saab	45	32	33	83	34	23	205
Isuzu	46	24	28	69	28	53	201
Scion	47	35	36	57	38	16	182
Smart	48	18	25	67	29	33	172

Figure 1: Analyzes 3,456,538 online conversations from Twitter, Facebook, blogs, forums and news sites. Data collected from November 20th, 2015 - February 15th, 2016. Find monthly updates of these scores on Brandwatch's Social Indices.

4.0 The Brand-Audience Relationship

For automotive brands, building a strong reputation among their audience is paramount. Automobile consumers are dramatically influenced by how well they identify with and trust a brand. Social media presents an important opportunity for these brands to connect directly with their consumers and nurture loyalty, but to do so brands must be consistent with their identity and reliable with their responses.

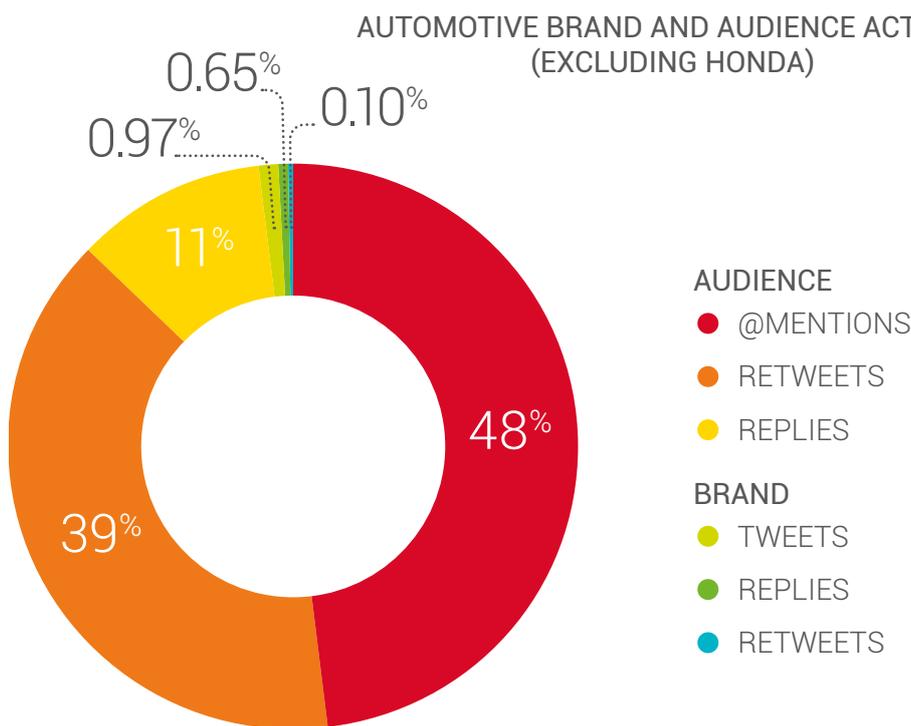


Figure 2: Analyzes 915,798 tweets from November 20th, 2015 – January 26th, 2016.

Among the brands analyzed, non-brand-owned accounts comprised 98% of the online conversation while brands only maintained a 2% share. Clearly, audiences are dominating the discussion, reinforcing the need for brands to find ways to alleviate issues and amplify their praises online. Although brands only control 2% of the conversation, they may still be able to extract significant value from the 98% of chatter and even guide the public dialogue around their brand through their networks.

Some brands are highly successful at engaging and responding to their audiences. Honda in particular is an outlier in brand-audience activity, with significantly more replies than any of its competitors.

HONDA BRAND AND AUDIENCE ACTIVITY

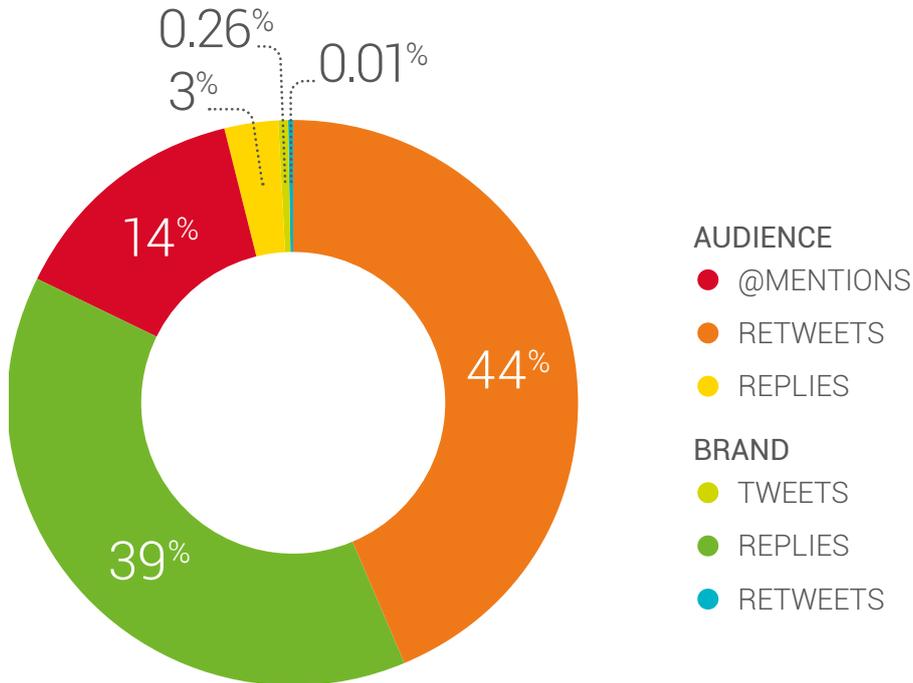


Figure 3: Analyzes 541,835 tweets from November 20th, 2015 – January 26th, 2016.

Indeed, Honda maintains the most responsive Twitter account of all automotive brands measured – replies directly from Honda represented 39% of the dialogue between the brand and its audience. However, it's important to note that a lot of these responses are automated replies to audience tweets submitting to the "Happy Honda Days" contest in December, which offered prizes in exchange for retweeting the brand's content.

Yet on a normal day, most brands are surprisingly inactive for an industry as well-established as the automotive industry is.

AN AVERAGE DAY ON TWITTER (EXCLUDING HONDA)

AUTOMOTIVE BRANDS AVERAGE FOLLOWERS: 386,775		AUTOMOTIVE AUDIENCES	
TWEETS	5	@MENTIONS	184
REPLIES	2	REPLIES	34
RETWEETS	0.31	RETWEETS	120

Figure 4: Analyzes 915,798 tweets from November 20th, 2015 – January 26th, 2016.

AN AVERAGE DAY ON FACEBOOK

AUTOMOTIVE BRANDS AVERAGE PAGE LIKES: 5,002,795		AUTOMOTIVE AUDIENCES	
POSTS	1.2	LIKES	5,678
COMMENTS	1.9	COMMENTS	139
		SHARES	541

Figure 5: Analyzes 1,858,525 Facebook conversations from November 20th, 2015 – January 26th, 2016.

On average, these brands tweet 5 times per day and post on Facebook 1.2 times per day. In the context of other industries analyzed, automotive brands are moderately active on Twitter yet draw fewer @Mentions. On Facebook, automotive brands post less often than most industries, but draw a relatively high level of engagement from their posts.⁴

4.1 Brand-Audience Timing

Most business leaders will agree: in any communication strategy, the timing can sometimes be as important as the message itself. In social, activating audiences when they're actually engaged ensures that they have more opportunities to notice and respond to brands. By quickly handling incoming complaints and praise, brands demonstrate that they are always available to their consumers, which in turn translates to a stronger relationship.

While the automotive industry is fairly well aligned with its audience there are some common discrepancies between the times brands and their audiences are active online.

⁴ Brandwatch. *Social Insights Series: Luxury Fashion; Nonprofit; Restaurant, Food & Beverage; Telecommunications; Television Networks*. 2015.

BRAND AND AUDIENCE ACTIVITY BY DAY

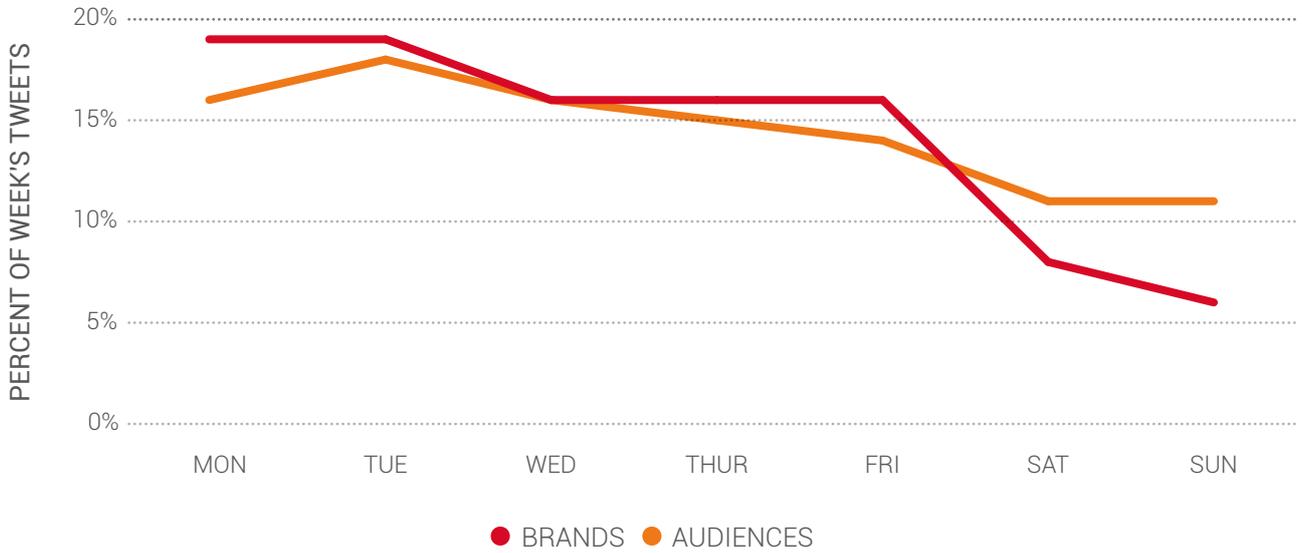


Figure 6: Analyzes 271,814 tweets from November 20th, 2015 – January 26th, 2016.

Firstly, activity on brand's accounts slows after Monday, with a sharp drop-off during the weekend. Meanwhile, their audiences are only slightly less active on Saturday and Sunday.

Examining hourly activity shows that audiences are more consistently communicating with brands throughout the day, while brands are considerably less active during non-working hours.

BRAND AND AUDIENCE ACTIVITY BY HOUR

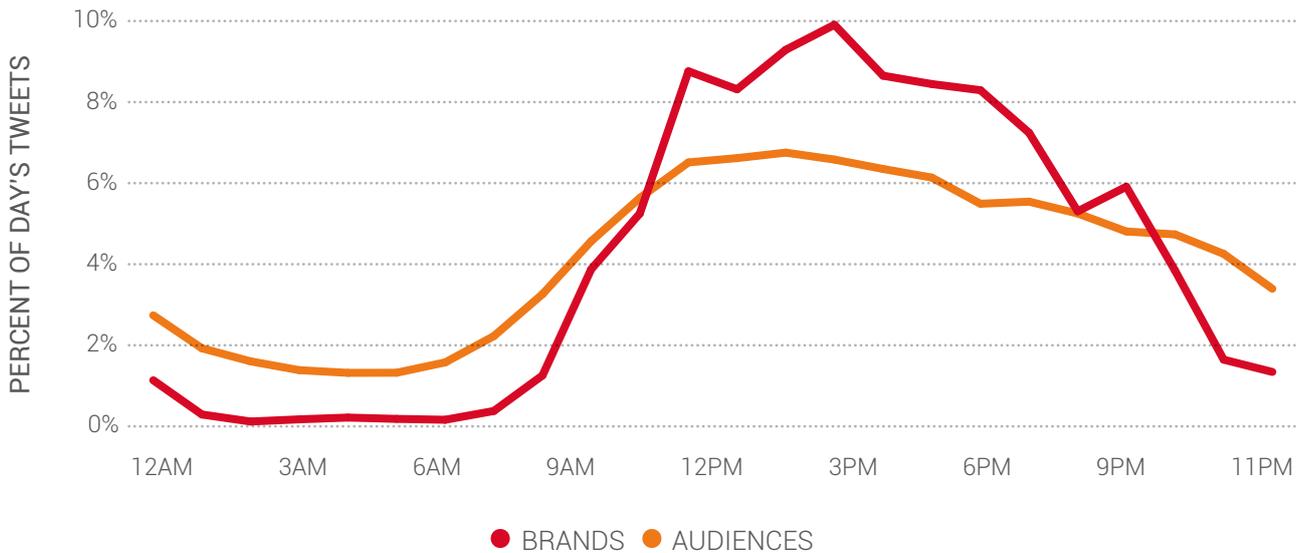


Figure 7: Analyzes 204,173 tweets from November 20th, 2015 – January 26th, 2016. Analysis limited to conversations based in United States.

Again, while these discrepancies are common for most industries, businesses should recognize that their audiences are active at all times. Businesses may lose opportunities by not sharing content or replying to questions during non-working hours. Social teams may be able to activate weekend audiences by scheduling tweets but should also consider how they will react to praise, complaints and crises that arise during off-hours.

4.2 Brand Content

For an industry where style and identity are key factors in a purchasing decision, the way brands present themselves and their products online can have an important effect on consumers' perceptions and purchasing decisions.

An analysis of automotive brands' Facebook content reveals that their strategy is primarily driven by photos, which comprises 72% of their posts.

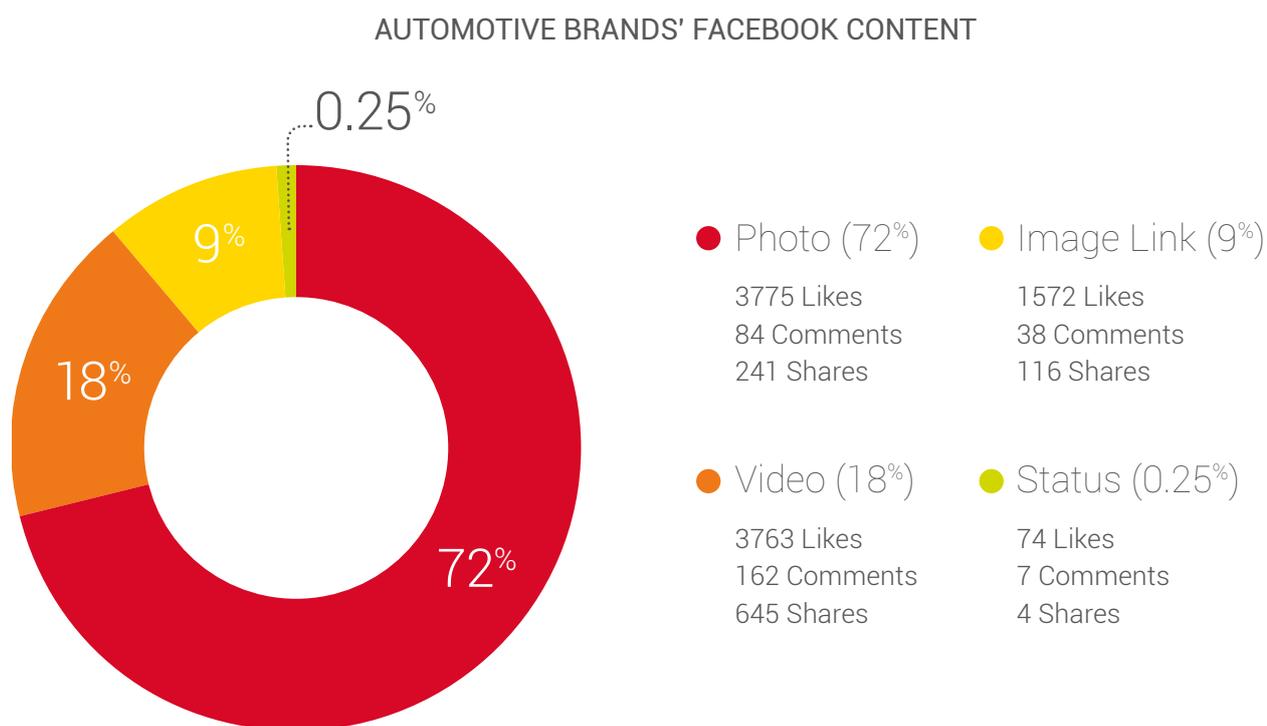


Figure 8: Analyzes 3,219 Facebook posts from automotive brands from November 20th, 2015 – January 26th, 2016.

Although photos are highly successful for brands, videos, which only represent 18% of their content, actually earn a similar number of likes and significantly more comments and shares. While videos may require more effort to produce, businesses should recognize that videos will be a more effective way to reach new consumers, as each share spreads content through audiences' networks.

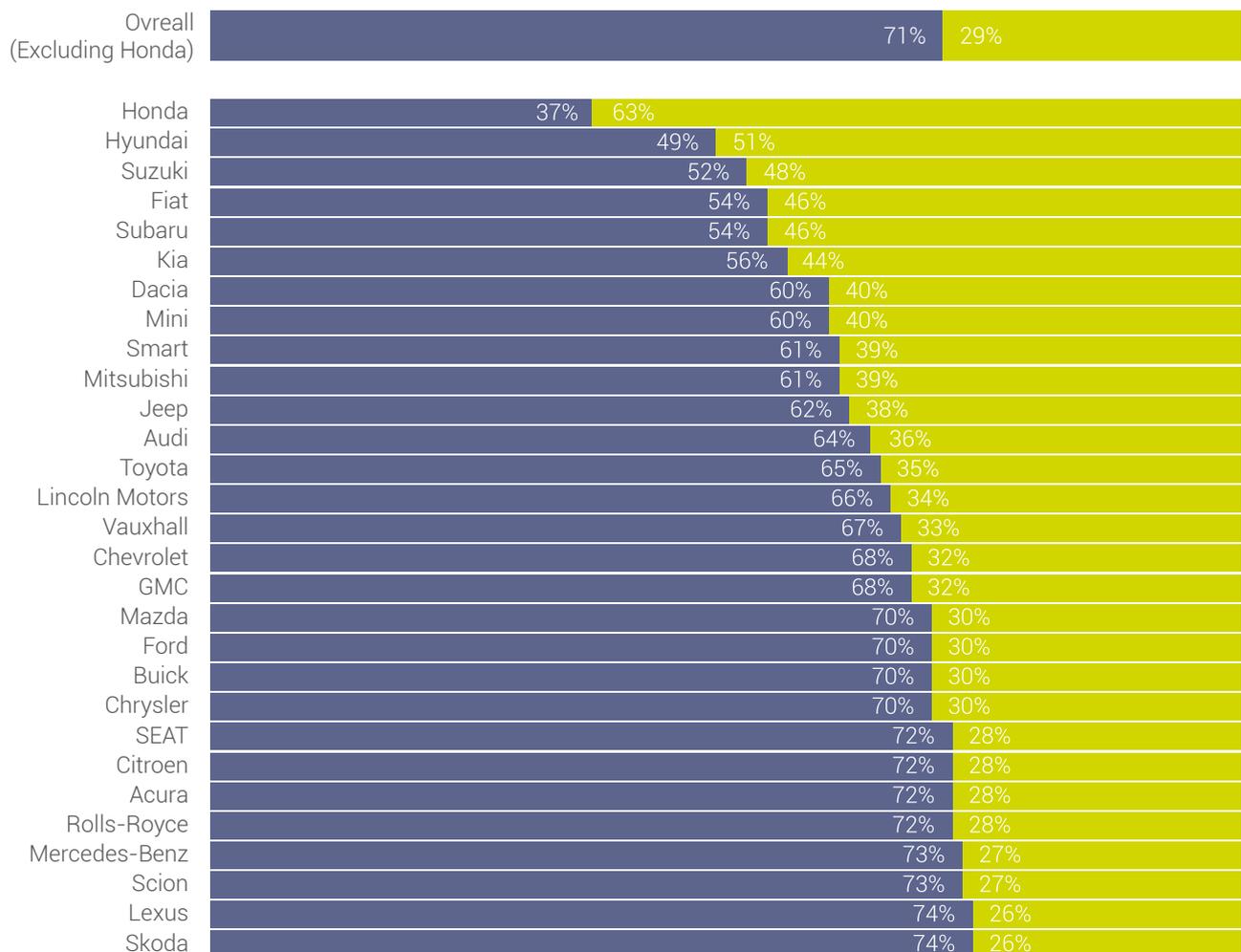
5.0 A Look at Automotive Audiences

5.1 Gender Analysis

The audiences discussing automotive brands are overwhelmingly male – on average, 73% of the Twitter mentions of automotive brands come from males.⁵

Of the audiences analyzed, Isuzu (90%), Alfa Romeo (88%) and Saab's (85%) are the most male while Honda (63%), Hyundai (51%) and Suzuki's (48%) are the most female.

AUTOMOTIVE AUDIENCE GENDER



● MALE ● FEMALE

⁵ Industry average excludes Honda, which comprises nearly 40% of the total mentions analyzed. With Honda included, the industry conversation would be 62% male and 38% female.

AUTOMOTIVE AUDIENCE GENDER

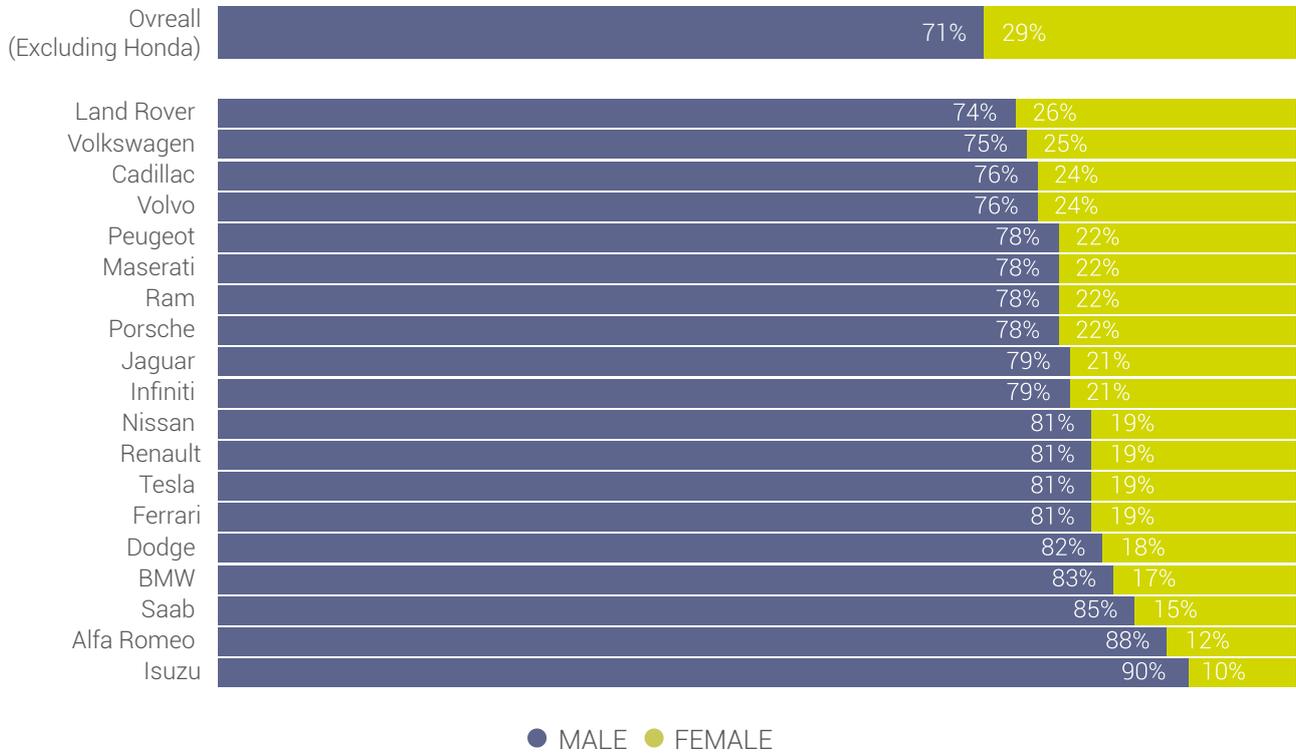


Figure 9: Analyzes the gender of 681,442 Twitter conversations from November 20th, 2015 – February 8th, 2016. Gender is identified through online profiles and advanced machine learning techniques.

Honda's strong presence among females was driven by two campaigns. The first was their #HondaCivicTour with One Direction, which peaked on November 16th and 23rd with an audience that was 78% female. The second was their #OpenTheCheer campaign, which lasted throughout the month of December, earning over 100,000 retweets from a 66% female crowd.

By understanding the gender breakdown across brands, models and campaigns, businesses are better able to target their efforts to the appropriate audiences.

5.2 Interest Analysis

The most frequent interests of those discussing automotive brands are Sports (15%), Automotive (13%) and Family & Parenting (11%).

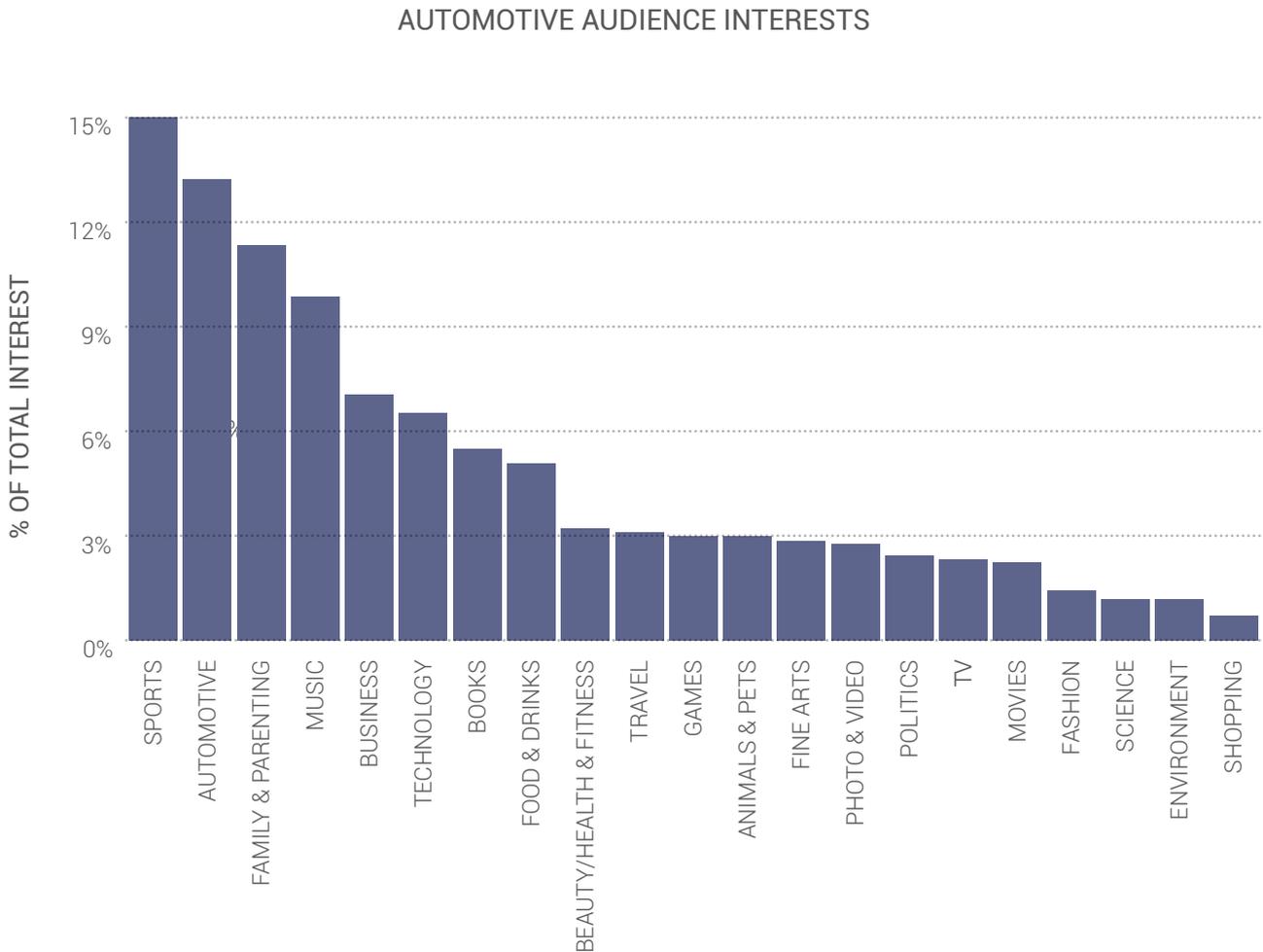


Figure 10: Analyzes 613,267 tweets from November 20th, 2015 – January 26th, 2016. Interests are identified through online profiles and advanced machine learning techniques.

While it may be surprising that Sports ranked higher than Automotive, in fact this is reasonably expected, as sports is one of the most common interests globally. Yet while aggregate industry information may be useful, businesses should recognize how online audiences compare across brands, models and campaigns.

For example, the following figure analyzes audience's interests across Mercedes-Benz, Tesla and Honda, exposing the unique fans and consumers that each brand attracts.

AUDIENCE INTERESTS BY BRAND

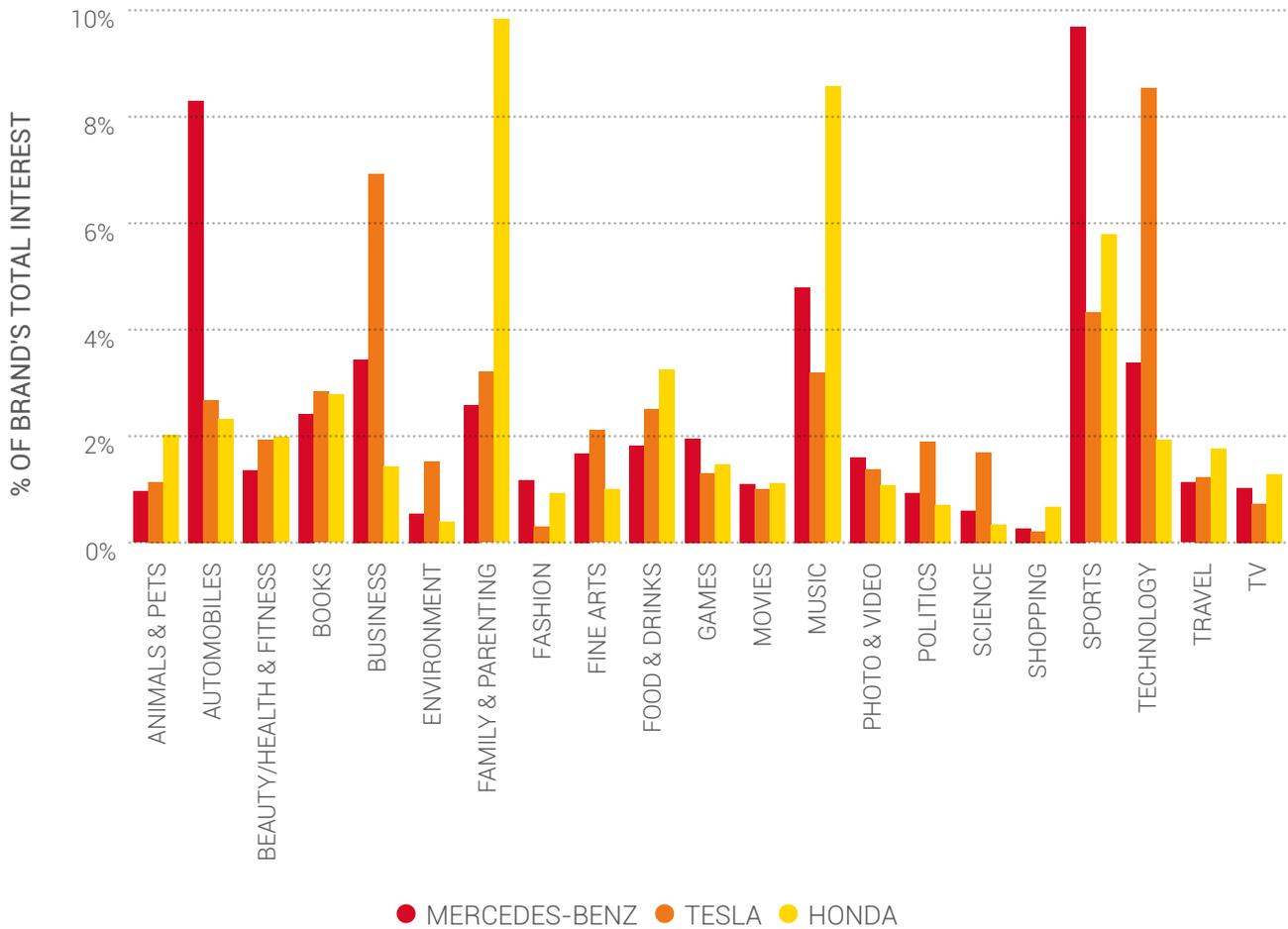


Figure 11: Analyzes 430,730 tweets from November 20th, 2015 – January 26th, 2016. Interests are identified through online profiles and advanced machine learning techniques.

Notably, Mercedes-Benz's audience stands out for its interest in Automobiles (8.2%) and Sports (9.5%), Tesla's following favors Business (6.8%) and Technology (8.4%), and Honda's audience leans toward Family & Parenting (9.7%) and Music (8.4%).

These differences provide some valuable implications for each brand. For Tesla, the conversation may be driven by people interested in the direction of the pioneering technology and potential business opportunities, but the brand may not connect with the everyday consumer as well as Honda seems to. Meanwhile, it's understandable that a company with as much heritage as Mercedes-Benz would rank highest in the automotive category.

5.3 Profession Analysis

Within automotive audiences, Artists and Executives represent the most common professions at 22.8% and 21.9% respectively.

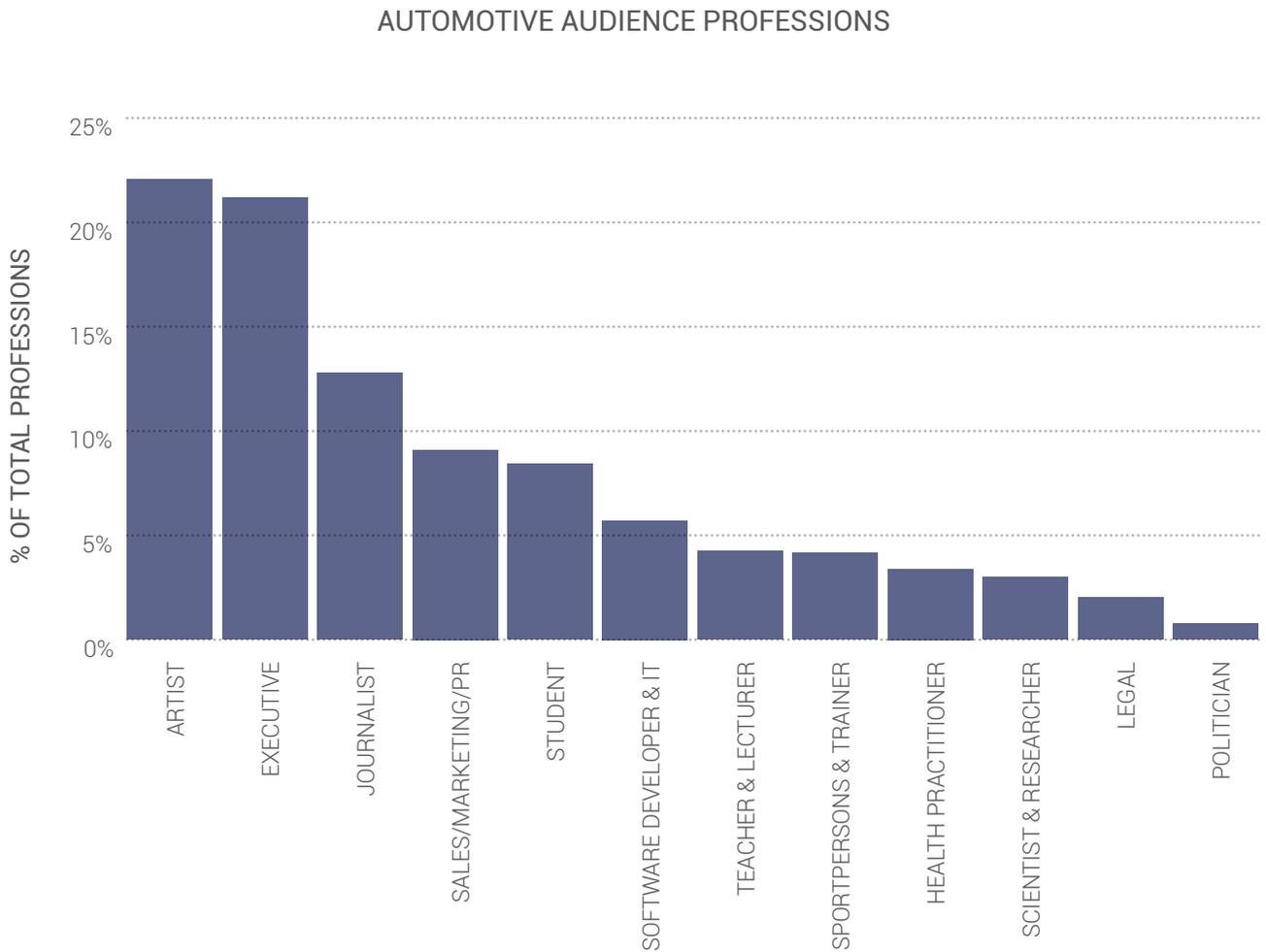


Figure 12: Analyzes 111,045 tweets from November 20th, 2015 – January 26th, 2016. Professions are identified through online profiles and advanced machine learning techniques.

Again, while the industry norm may provide a helpful benchmark, separating profession across brands reveals the unique following that each business activates.

AUDIENCE PROFESSIONS BY BRAND

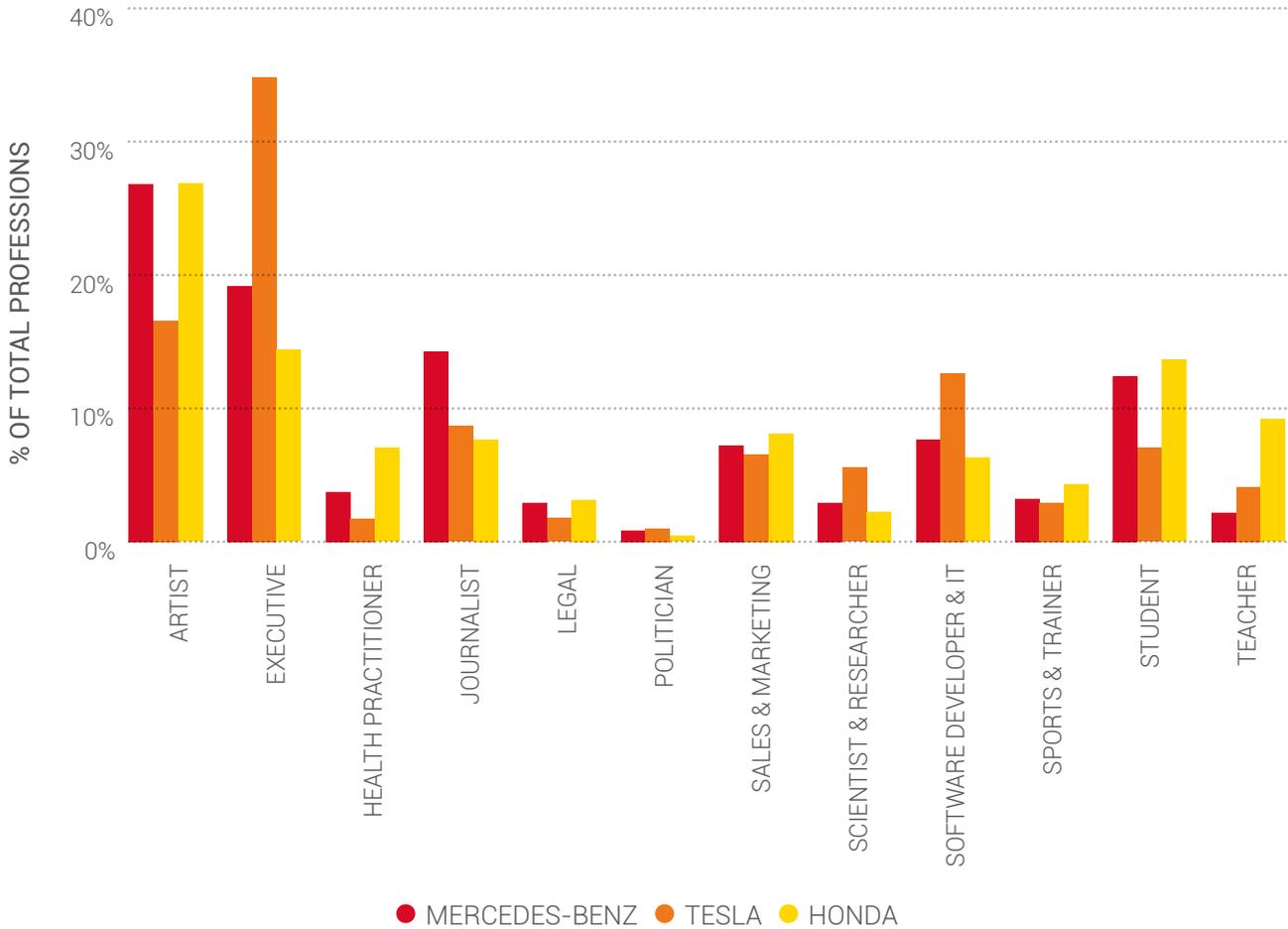


Figure 13: Analyzes 35,215 tweets from November 20th, 2015 – January 26th, 2016. Professions are identified through online profiles and advanced machine learning techniques.

Unsurprisingly, Tesla's audience, which is interested in Business and Technology, leans toward Executive (33.7%) and Software Developer & IT (12.2%) professions. Meanwhile, both Mercedes-Benz and Honda are popular among Artists and Students. Honda maintains a distinctly larger presence among Teachers (8.9%) than the other two brands.

By evaluating both professions and interests together, businesses can conceptualize how their audience and their competitors' audiences differ, informing product and marketing strategies that connect to a more specific group.

6.0 Associated Adjectives Analysis

For automotive businesses, every brand and vehicle holds a reputation for having certain attributes. A brand's reputation shapes their identity and ultimately their consumer. For example, consider the figure below, which reveals how often people associate brands with a series of adjectives.

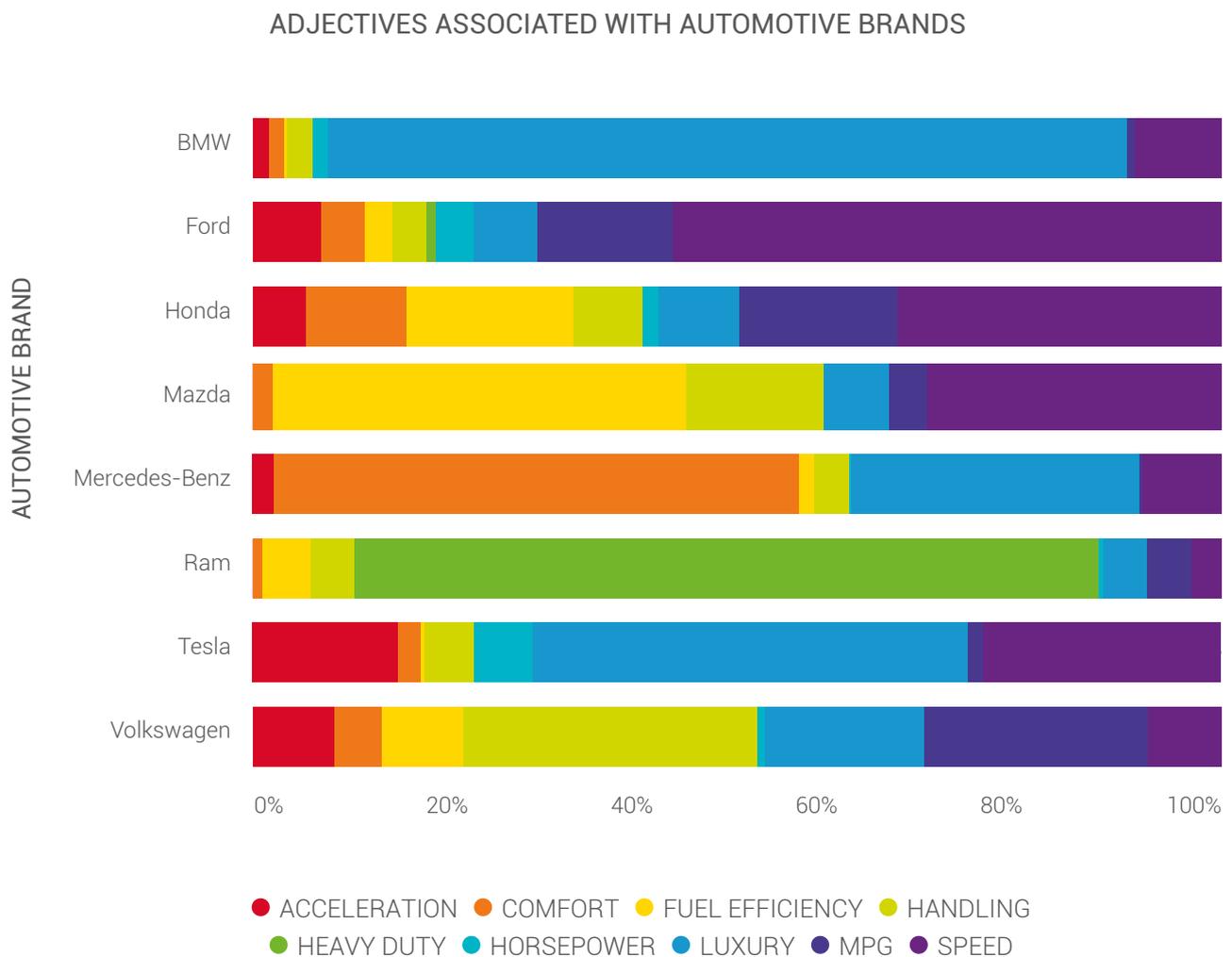


Figure 14: Analyzes 8,264 tweets from November 20th, 2015 – January 26th, 2016. Associated Adjectives are identified through Brandwatch Rules, which use boolean language to identify terms in a specific context. The analysis excludes conversations from brand-owned accounts.

Mercedes-Benz, BMW and Tesla are among the most likely to be referred to as "luxury," while Ram dominates chatter around their slogan, "Heavy Duty." Interestingly, Mazda has sparked chatter around its vehicles' "Fuel Efficiency" while Mercedes-Benz is noted for its "Comfort." Businesses can use social intelligence to dig into each category and uncover the verbatim conversations surrounding certain aspects of their vehicles.

Such analysis helps companies gain a sense of how their audiences are describing their competitors' brands and cars, which can help direct marketing messaging and even provide valuable feedback for future car models and designs.

7.0 A Look at Hybrid Vehicles

In 1997 Toyota introduced the Prius to the Japanese auto market. The first ever mass-produced hybrid vehicle, the Prius offered a new solution to mounting concerns over the dwindling supply and rising price of gasoline as well as the environmental effects of carbon emissions.

The endeavor proved successful for Toyota, who now enjoys 76% of the hybrid car market, distantly followed by Ford's 11%.⁶ As the figure below reveals, the breakdown of conversations around brands' hybrid vehicles roughly resembles the sales market.

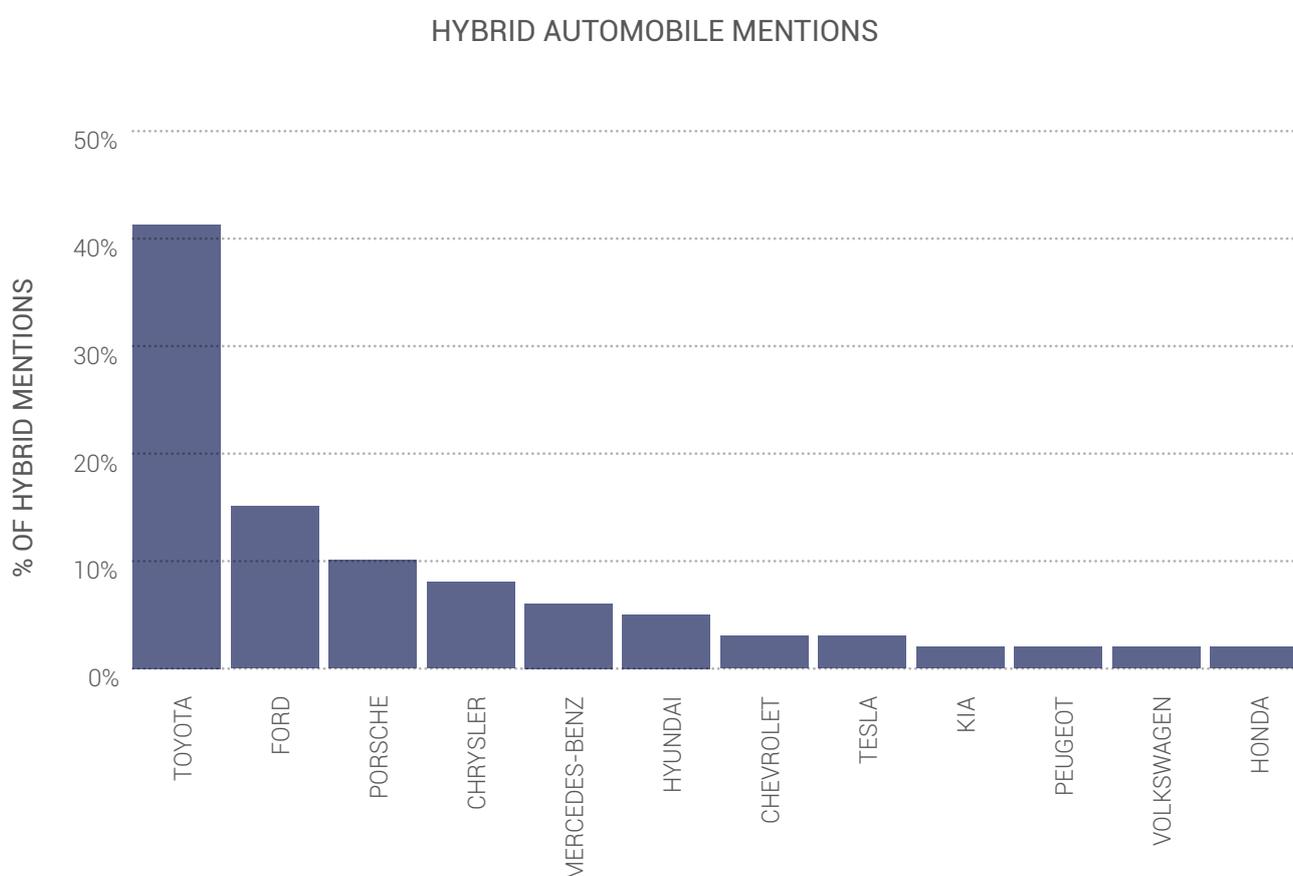


Figure 15: Analyzes 6,419 tweets mentioning hybrid vehicles in reference to the above automotive brands from November 16th, 2015 – February 4th, 2016.

Of the brands in this analysis, Toyota maintains 41% of the conversation around hybrids, while Ford is referenced around 15% of the time. However, while Porsche (10%) and Chrysler (8%) do not currently offer a hybrid vehicle, their share of voice is around their future plans to introduce a hybrid into their offering. The excitement that each has generated online may be an indication of the initial success.

⁶ Hybridcars.com. www.hybridcars.com/december-2015-dashboard

Yet as Porsche, Chrysler and other manufacturers introduce new hybrid models, in fact total sales of hybrid cars have actually been declining since 2013.⁷ Indeed, an analysis of the fluctuation of conversation around hybrid cars and the Toyota Prius reveals that the volume of chatter has essentially plateaued since the start of 2014.

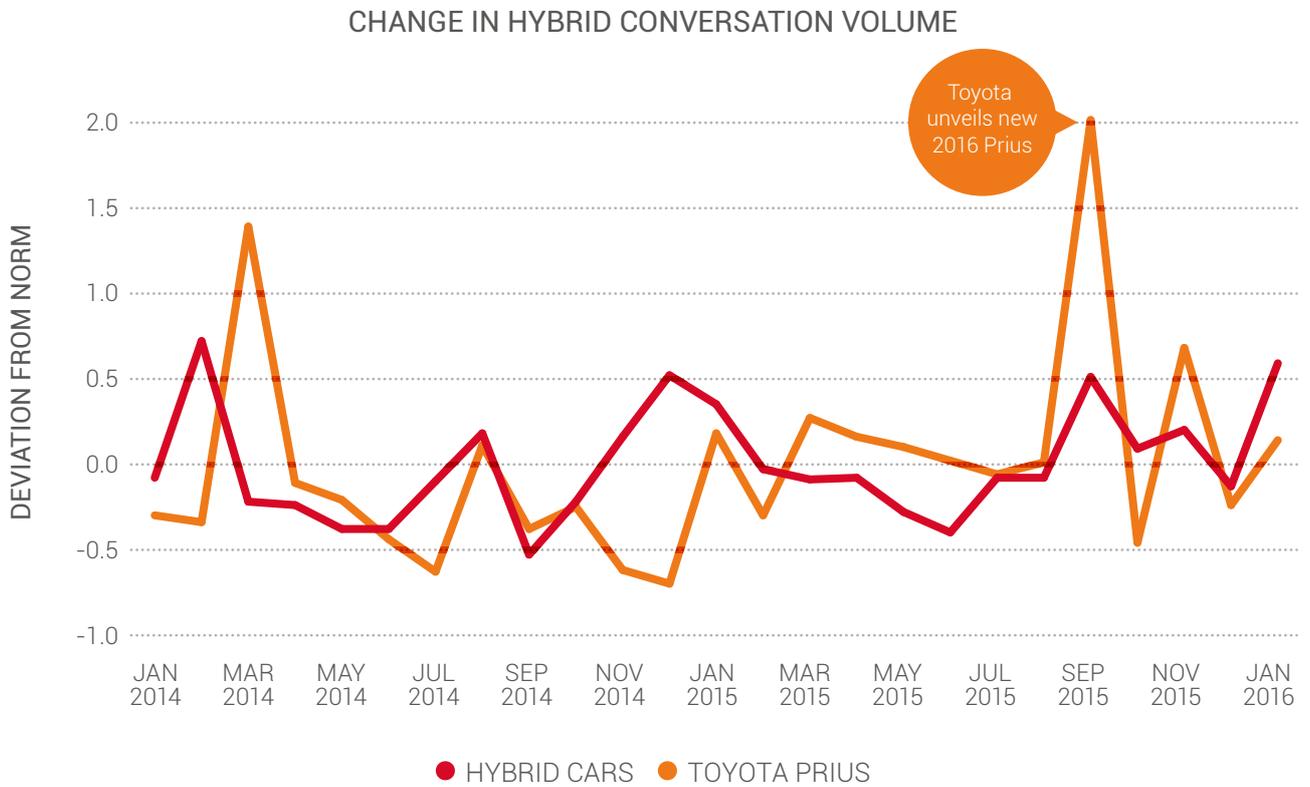


Figure 16: Analyzes 207,010 Twitter mentions of Hybrid cars and Toyota's Prius specifically from January 1st, 2014 to January 31st, 2016.

⁷ Argonne National Laboratory. www.anl.gov/energy-systems/project/light-duty-electric-drive-vehicles-monthly-sales-updates

8.0 A Look at All-Electric Vehicles

In the wake of the success of hybrid vehicles, a number of automobile manufacturers introduced all-electric vehicles. While the Nissan LEAF was the first to be mass-produced, its sales within the US were soon outpaced by Tesla's Model S.⁸

Tesla's presence is reflected online as well. Of the five automobiles analyzed, Tesla's Model S maintained 67% of the share of voice. Interestingly, although the LEAF was the second highest selling vehicle in 2015, the BMW i3 actually generated slightly more conversation.

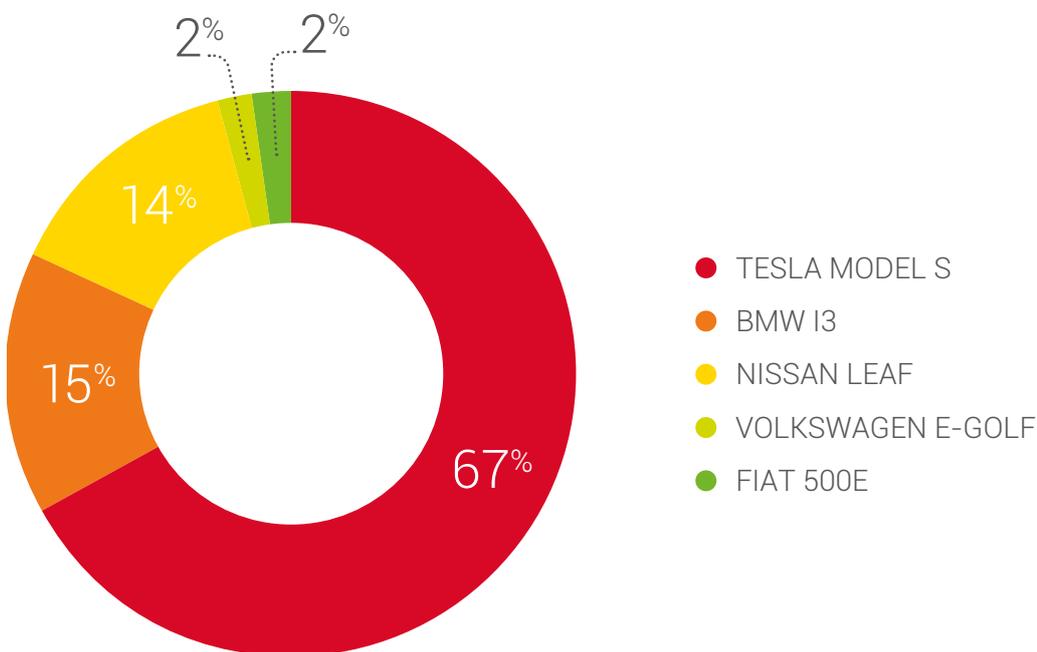


Figure 17: Analyzes 1,176,112 Twitter mentions from January 1st, 2014 to February 7th, 2016.

Furthermore, Tesla's lead on social doesn't appear to be slowing. Between 2014 and 2015, mentions of Tesla's Model S grew by 80% while conversation around the BMW i3 and Nissan LEAF grew 42% and 50% respectively.

⁸ Statista. www.statista.com/statistics/257966/best-selling-electric-cars-in-the-united-states

PURE-ELECTRIC VEHICLE MENTIONS

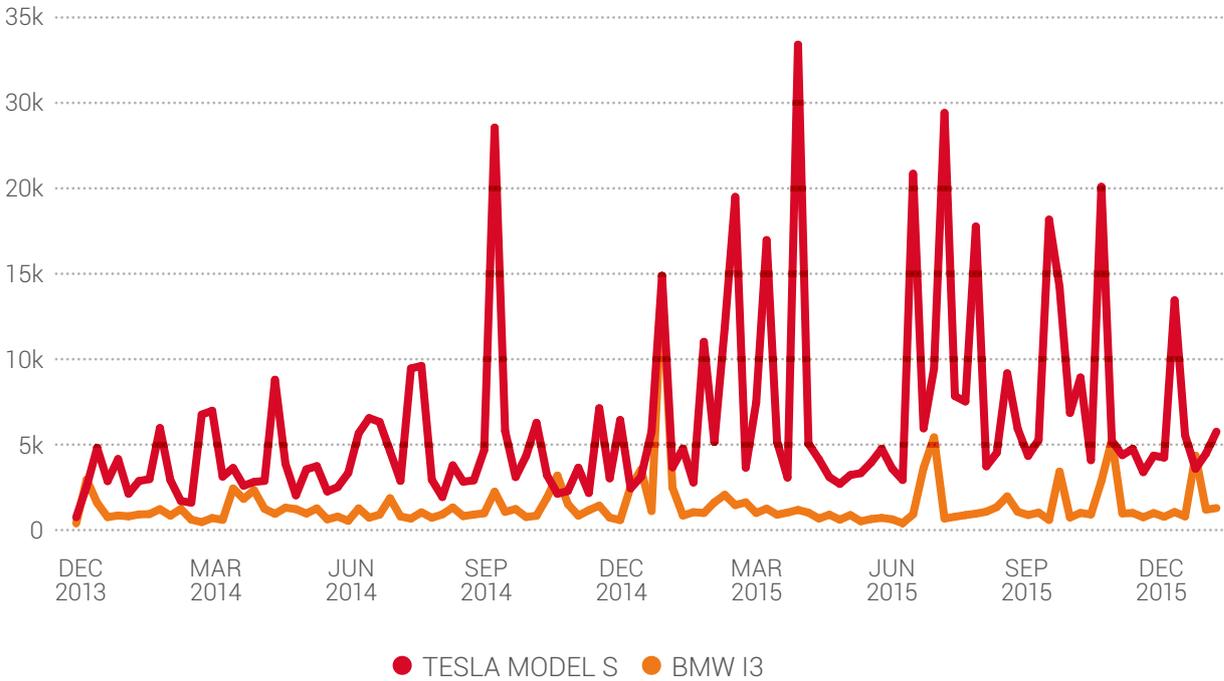


Figure 18: Analyzes 970,395 Twitter mentions from January 1st, 2014 to February 7th, 2016.

9.0 A Review of the Automotive Industry

In the next decade, the automotive industry will certainly undergo some important changes, driven by new technologies that affect engineering and design as well as the way brands interact and connect with their customers. These changes will threaten the existing business models but also provide opportunities for those that are prepared to adapt.

As outlined in this report, millennials, future consumers and current car owners are regularly voicing their concerns and opinions about brands, vehicles, technologies and other relevant issues through social media. For businesses aiming to build relationships with and adapt to the changes preferences of these consumers, social intelligence provides the means to collect, analyze and make sense of the disparate conversations.

Key Findings:

- Lexus, Honda and Audi are Brandwatch's three online leaders.
- Audiences account for 98% of the conversation around automotive brands on Twitter.
- Brands' online activity is lowest during non-working hours.
- While Photos are the most common Facebook post, Videos perform significantly better.
- While Honda's online audience is 63% female, the average of 47 other brands analyzed was 71% male.
- The most common interests for automotive audiences are Sports (15%), Automotive (13%) and Family & Parenting (11%).
- The most frequent professions for automotive audiences are Artists (22.8%) and Executives (21.9%).
- While BMW is most associated with "luxury" Mercedes-Benz is most associated with "comfort."
- Toyota (76%), Ford (11%) and Porsche (10%) are the most often referenced in relation to hybrid cars.
- Tesla's Model S (67%) maintains a dominant share of voice in the all-electric vehicle conversation.
- While conversation around hybrid vehicles has remained mostly stagnant, chatter around electric vehicles appears to still be increasing.

10.0 About Brandwatch

Brandwatch is the world's leading social intelligence company. Brandwatch Analytics and Vizia products fuel smarter decision making around the world.

The Brandwatch Analytics platform gathers millions of online conversations every day and provides users with the tools to analyze them, empowering the world's most admired brands and agencies to make insightful, data-driven business decisions. Vizia distributes visually-engaging insights to the physical places where the action happens.

The Brandwatch platform, ranked highest in customer satisfaction by G2Crowd in the Winter 2016 social media monitoring report, is used by over 1,200 brands and agencies, including Cisco, Whirlpool, British Airways, Sony Music, and Dell. Brandwatch continues on its impressive business trajectory, with more than 50 percent of revenues now from North America.

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