



Crimson Hexagon

# Analyzing Consumer Preferences in the Automotive Industry

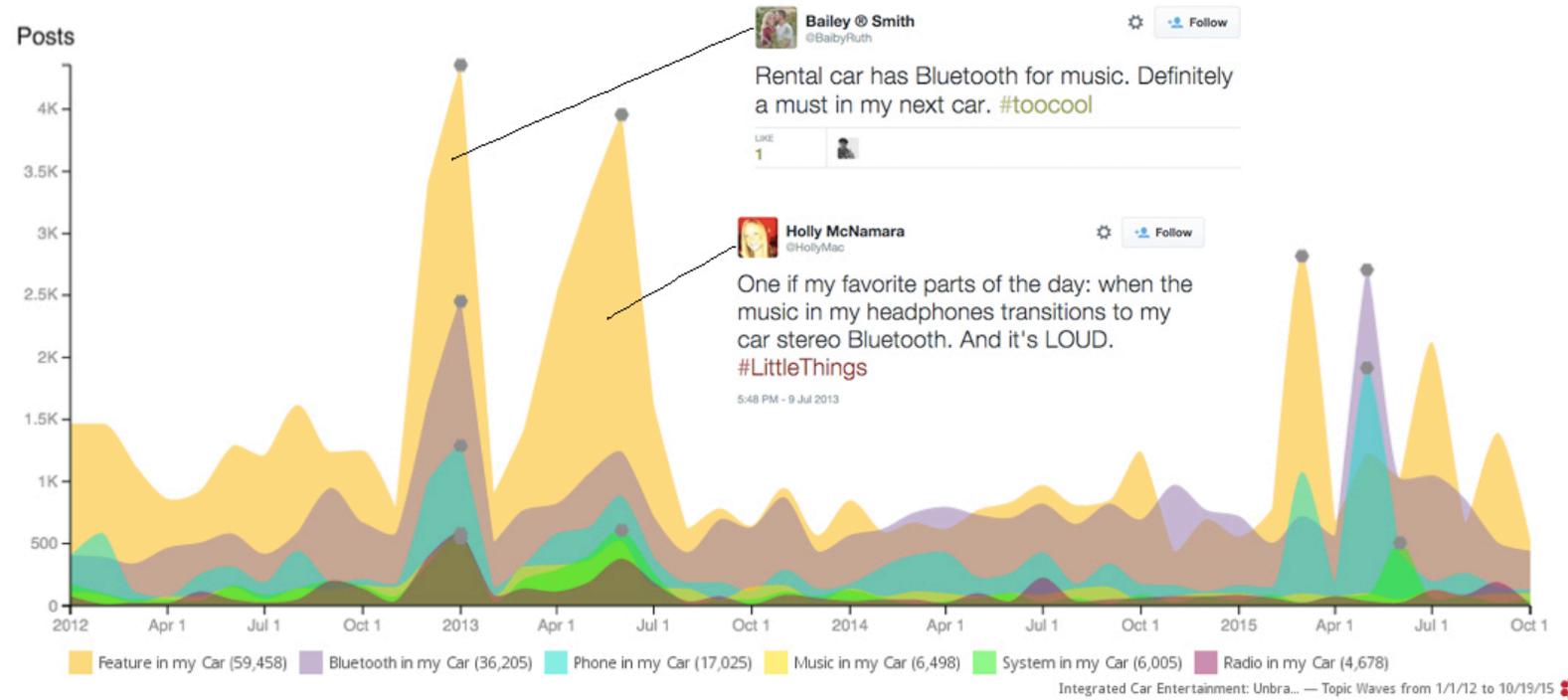
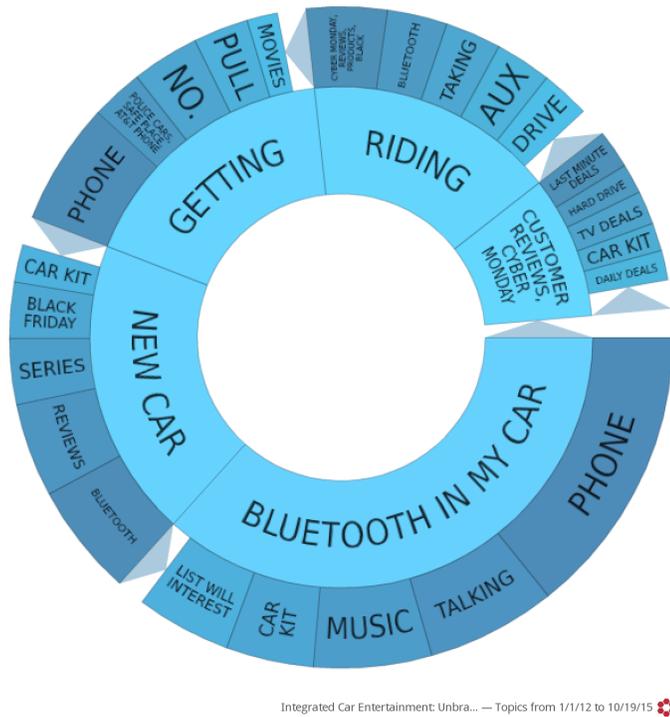
Uncovering Social Insights for Entertainment Technology

# Introduction

Integrated car entertainment technology has evolved into a complex and competitive market in recent years. Integrated systems have become a more significant feature for buyers in the automotive market, as car technology has adapted to this multi-billion dollar industry and grown in tandem, with major players such as Apple and Android even stepping in to claim their piece of the financial pie. Who is most interested in these types of technologies? At first guess, one might assume a younger, more tech-savvy audience is most interested in these advanced integrated features, but is this true? How are older audiences discussing the technology, and are they really interested in it? Using social data and audience analysis, we examined the intersection of the automotive and consumer electronics industries to get a deeper understanding of exactly how integrated car technology is evolving as a conversation.

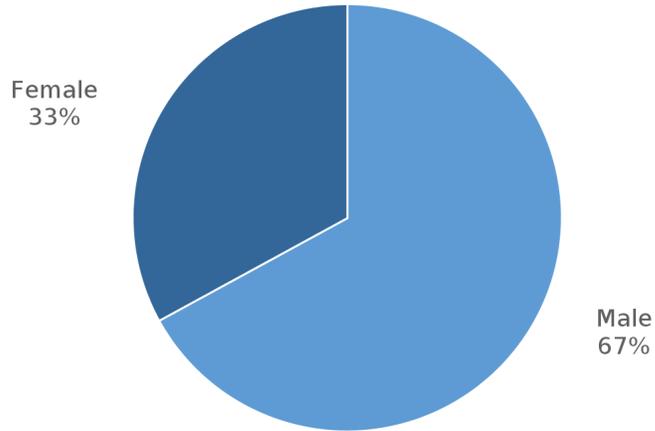
# Unbranded Car Features: Conversation Characteristics

# Unbranded Car Features Discussion Breakdown



When examining unbranded integrated car features, topics such as Bluetooth technology, phone connection, music options and other integrated entertainment systems are prevalent in the conversation. Consumers talk about these features quite often when discussing purchasing new cars.

# Unbranded Car Features Audience

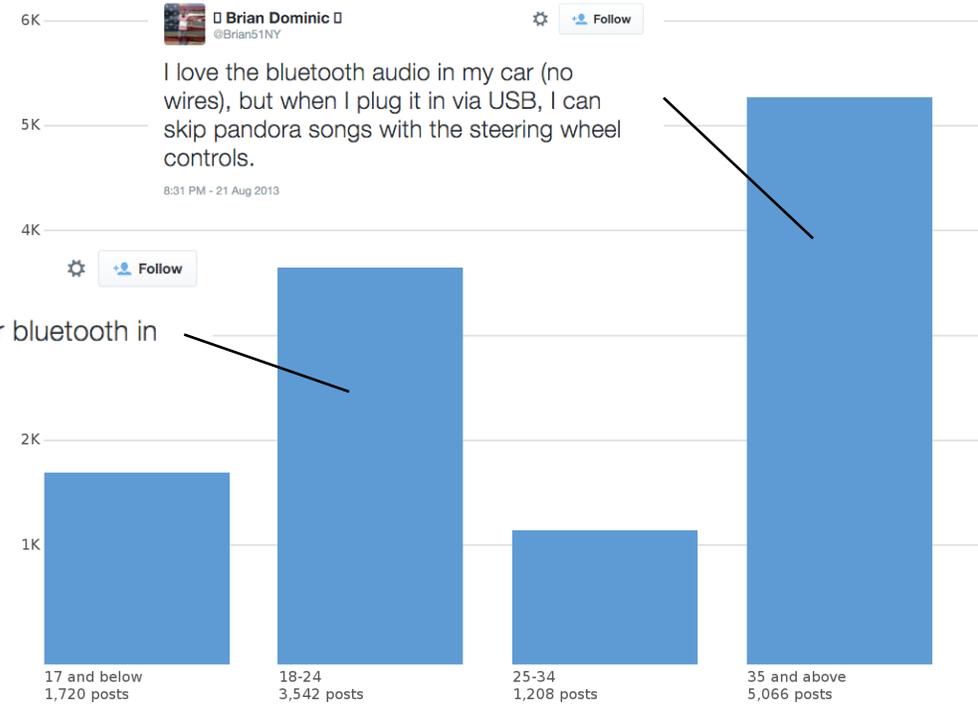


Integrated Car Entertainment: Unbra... — Gender Breakdown from 1/1/12 to 10/19/15



Playing Spotify wirelessly over bluetooth in my new car is pretty sweet

10:59 AM - 17 Feb 2013



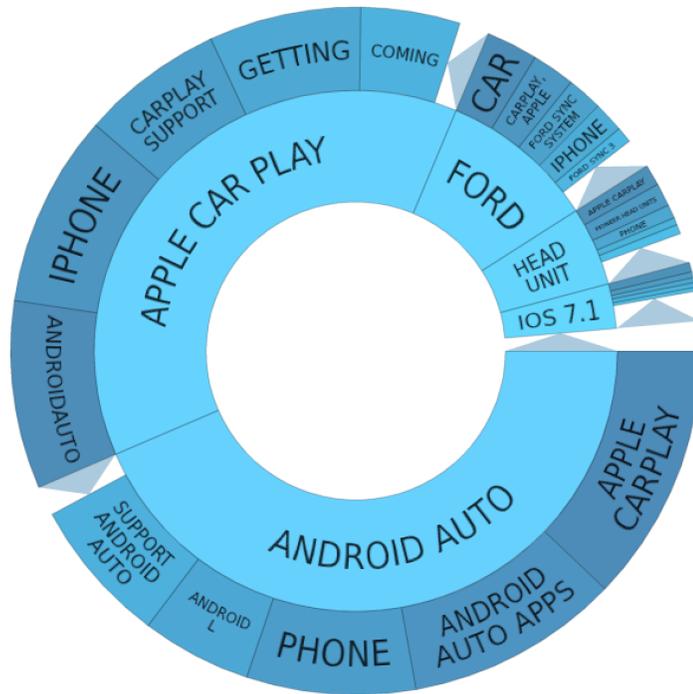
Integrated Car Entertainment: Unbra... — Age Breakdown from 1/1/12 to 10/19/15

In the unbranded conversation, the audience doesn't have any distinguishing factors, due to the wealth of different features being discussed. Many of the features prevalent in the conversation are attractive to multiple age groups, as can be seen by the wide range of age groups participating in the discussion. The unbranded conversation also tends to be more predominately male.

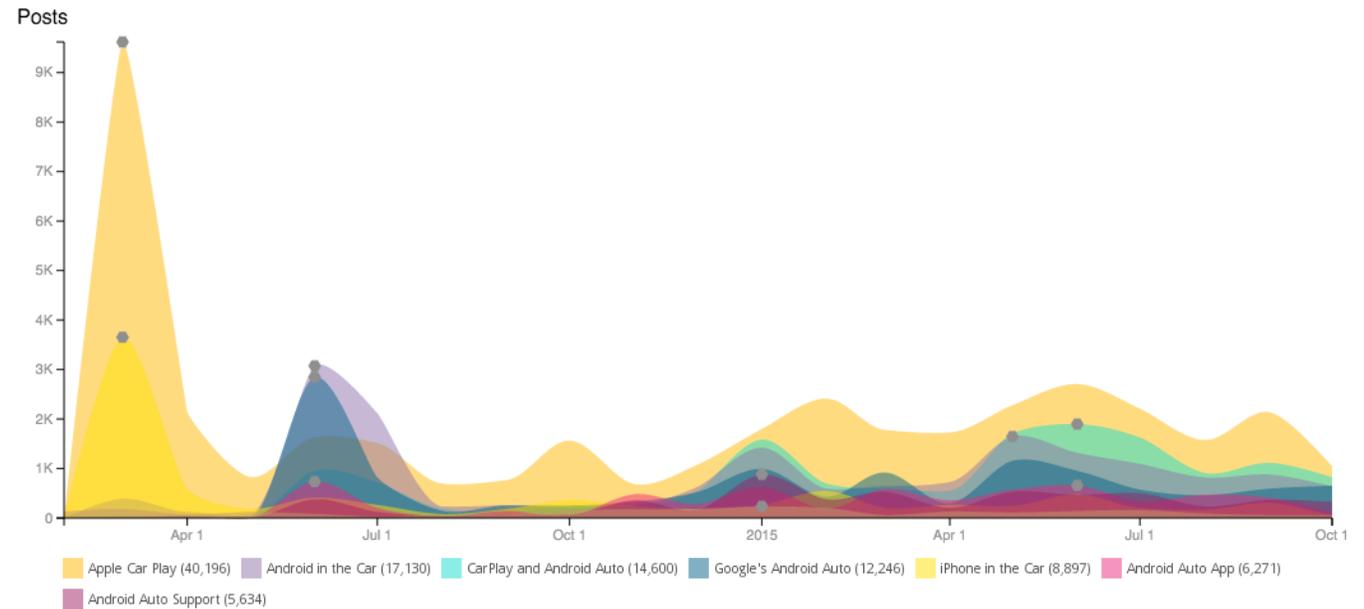
# Branded Car Features: Conversation Characteristics

# Branded Car Features Discussion Breakdown

When examining branded car features, there are two topics that stick out. While there is a small amount of conversation about Ford Sync, the majority of the conversation around integrated entertainment systems is attributed to Apple CarPlay and Android Auto. A significant part of the conversation is also posts comparing or mentioning both of the systems.



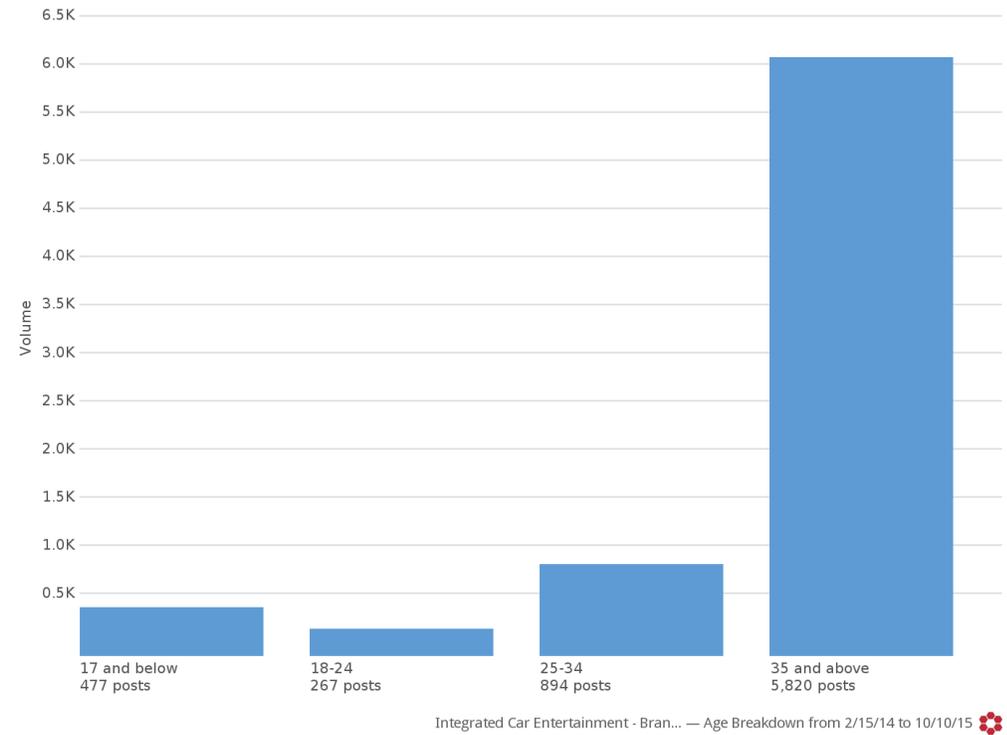
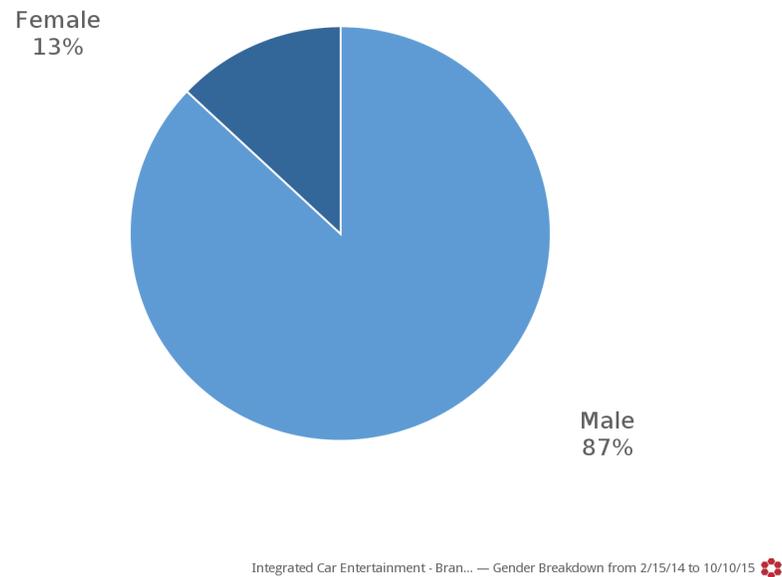
Integrated Car Entertainment - Bran... — Topics from 2/15/14 to 10/10/15



Integrated Car Entertainment - Bran... — Topic Waves from 2/15/14 to 10/10/15

# Branded Car Features Audience: Older Male Consumers

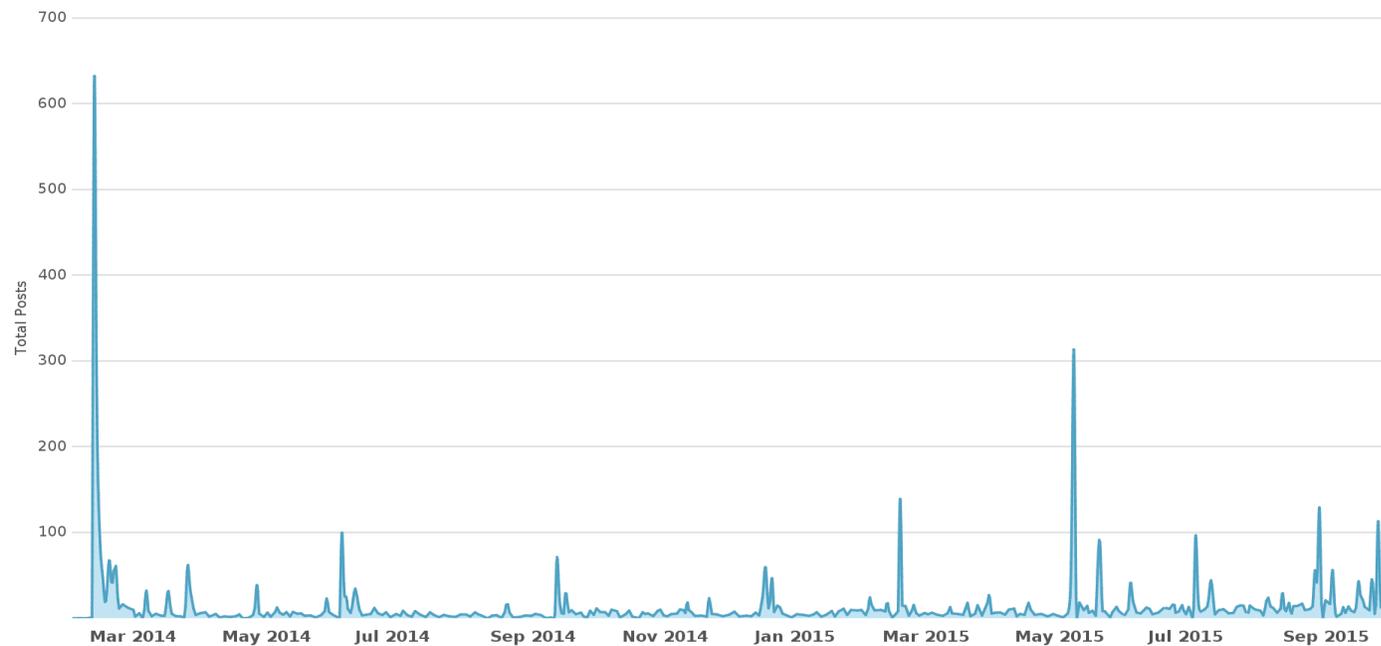
The audience discussing branded car features such as Apple CarPlay and Android Auto is a specific audience compared to the unbranded conversation, with it being predominately male and consumers that are 35 or older. Both Apple and Android, two companies that generally have a younger target demographic in the technology industry, seem to have captured an older audience with their car technologies.



# Breaking Down Competitive Brand Discussion: Apple CarPlay and Android Auto

# Apple CarPlay: Volume Analysis

When the conversation specifically about Apple CarPlay is filtered to remove websites, news-sharing, and retweets, we can see the organic volume of the conversation at a little over 7,000 posts. This is filtered down from over 160,000 posts, which shows that a vast amount of the conversation is generally retweets and articles detailing the feature or its release.



**7,378**  
Total Posts

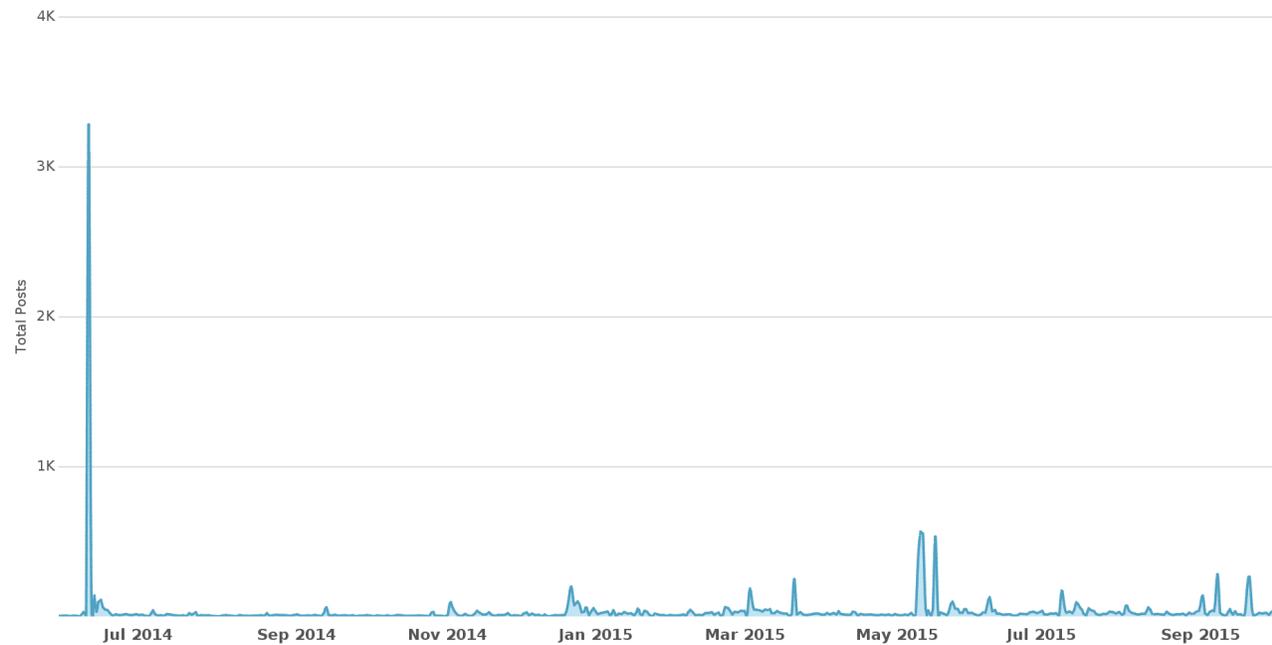
↓ **-3%**  
Total Post Volume

Apple CarPlay: No Web or RT — Volume from 2/21/14 to 10/20/15



# Android Auto: Volume Analysis

Android Auto, on the other hand, has a higher volume of which are organic and unfiltered. With over 245,000 posts, the organic conversation peaks at about 16,000 posts. Similar to Apple CarPlay, the vast majority of the conversation are neutral posts and retweets.



**16,664**  
Total Posts

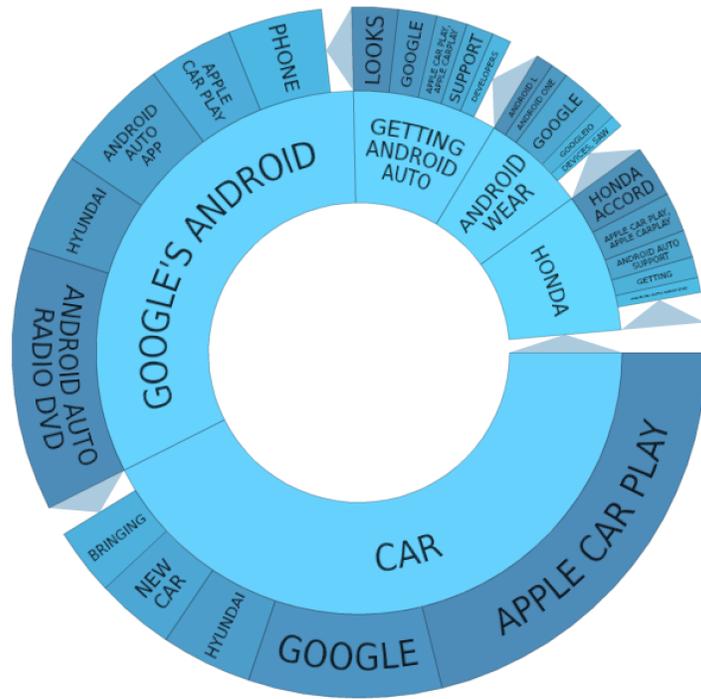
↓ **-13%**  
Total Post Volume

Android Auto: No Web or RT — Volume from 6/13/14 to 10/20/15

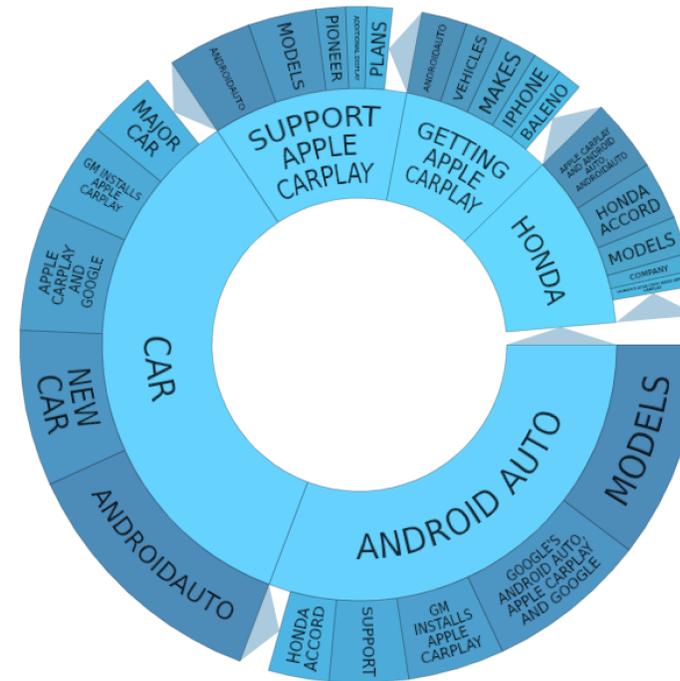


# Android Auto and Apple CarPlay Topic Overlap

An overlap in the topics of conversation explains how the systems are being compared. Android Auto's conversation is completely filled with conversation about the system, whereas the Apple CarPlay conversation has a significant amount of talk about the competitor Android Auto in addition, showing that the systems are being compared more within the conversation.



Android Auto: No Web or RT — Topics from 6/13/14 to 10/20/15 🌸

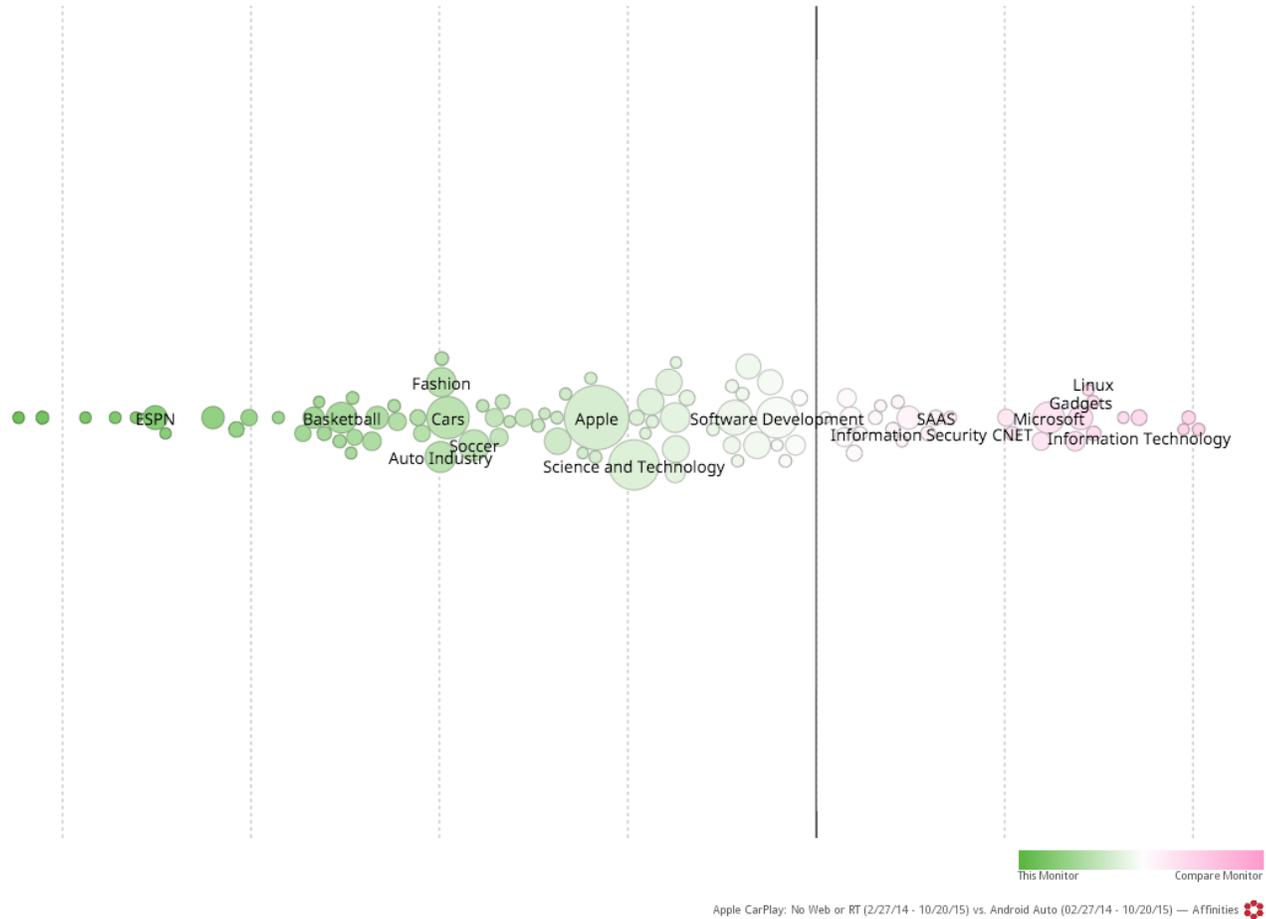


Apple CarPlay: No Web or RT — Topics from 2/21/14 to 10/20/15 🌸

# Android Auto and Apple CarPlay Audience Overlap

Apple CarPlay: No Web or RT (02/27/14 - 10/20/15)

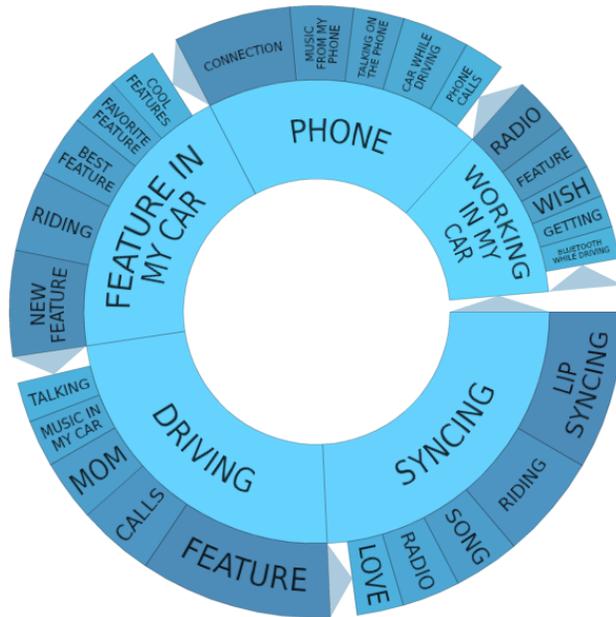
Android Auto (02/27/14 - 10/20/15)



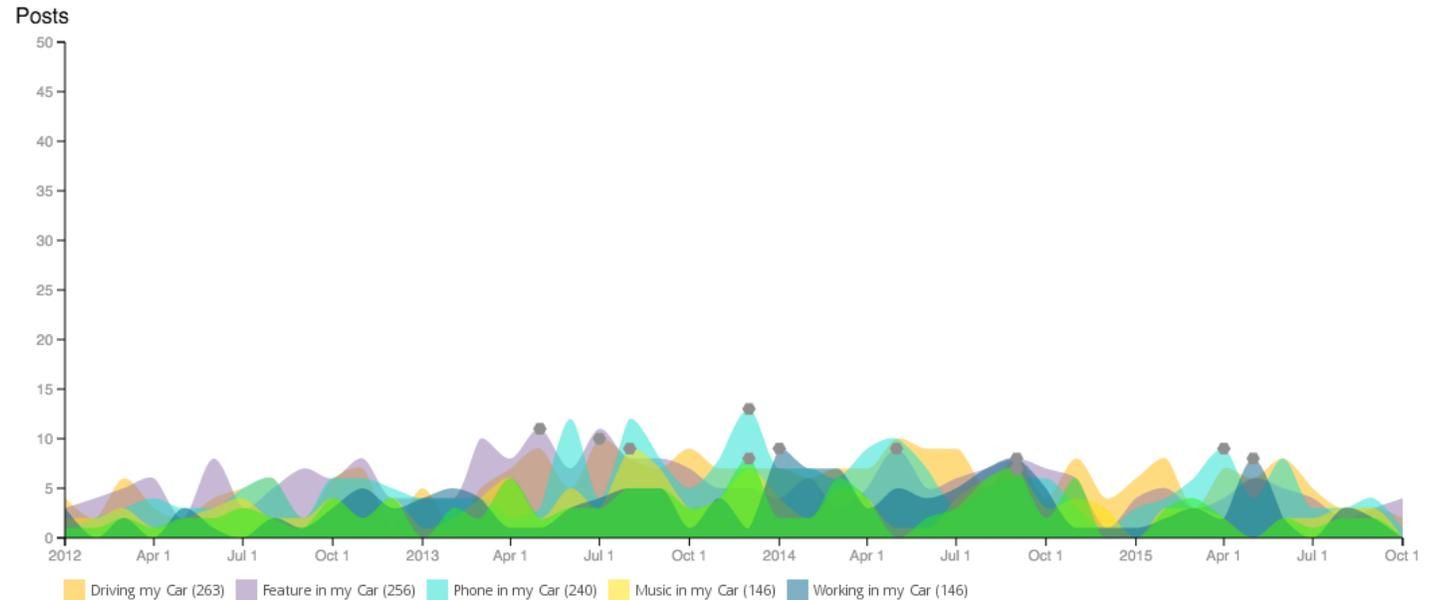
Looking at both Apple CarPlay and Android Auto conversation affinities compared to Twitter gives us a somewhat similar result. Both have almost identical audience affinities, validating the fact that these audiences are very similar and interested in discussing the same topics online. Although, when comparing the audiences between Apple CarPlay and Android Auto directly, we can see where these consumers differ quite a bit. While those discussing Apple CarPlay are more interested in more popular and mainstream topics, along with some technology, we can see a vast difference in the Android Auto conversation demographic. True to Android's almost "hipster" nature, its audience is more focused on technology, gadgets, information, and the like. These affinities give us some insights on where the interests and potential choices of users of these systems lie.

# Integrated Car Features: Generational Differences

# Younger Audience General Lack of Branded Product Interest



Integrated Car Entertainment: Unbra... — Topics from 1/1/12 to 10/10/15

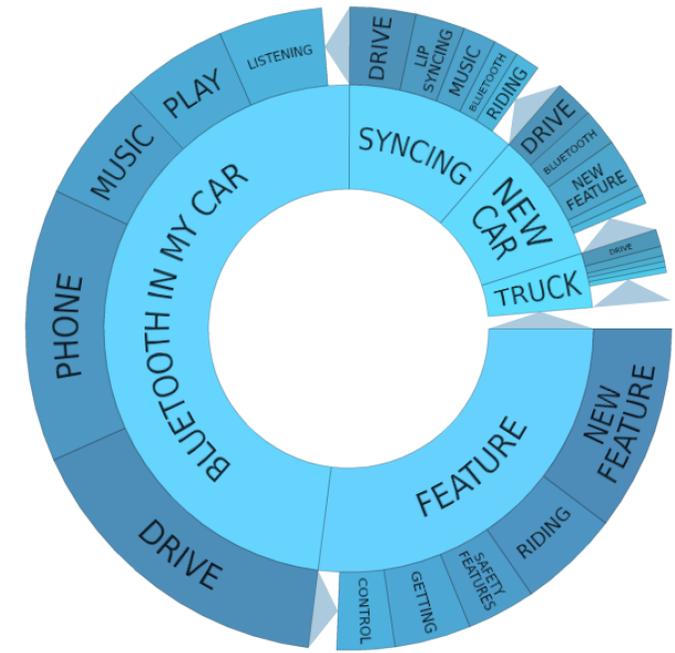
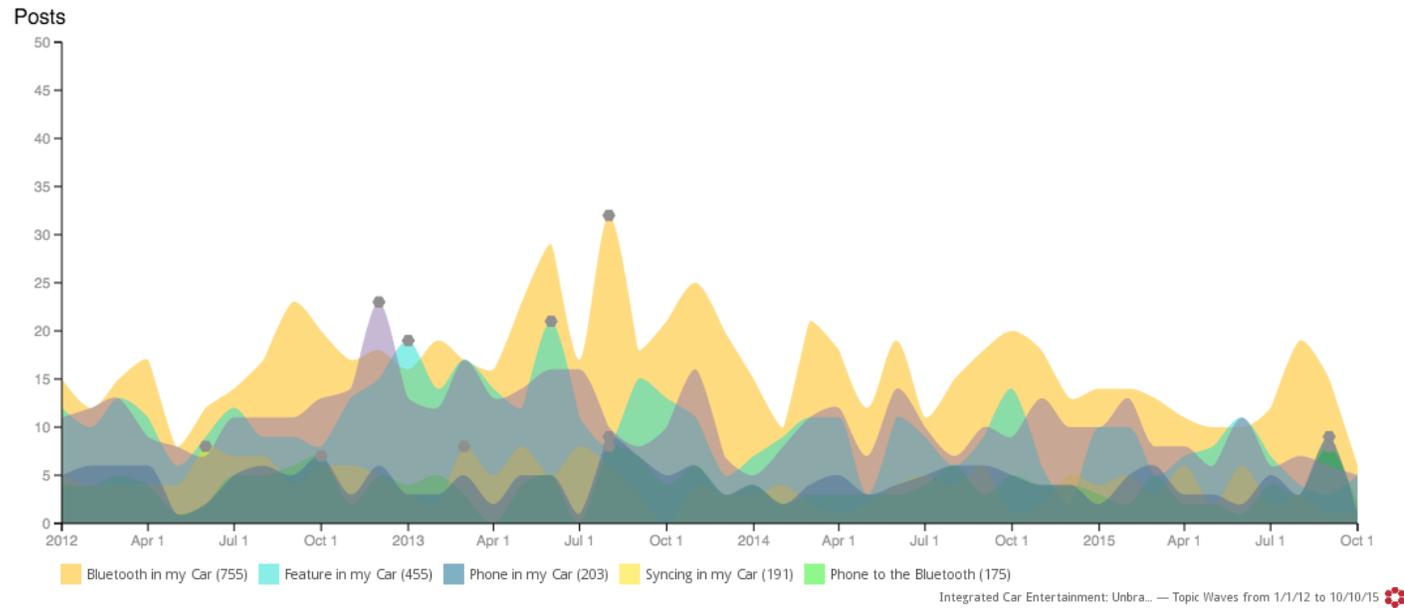


Integrated Car Entertainment: Unbra... — Topic Waves from 1/1/12 to 10/10/15

By using interests popular with younger audiences and filtering the conversation for those interests, we can take a deeper look at what a younger audience is talking about. When it comes to unbranded conversation, there is a general disinterest from younger audiences, most of them are less interested in advanced features and talk mostly about other random features, or simple things like how their phone works with their car. None of the topics stand out as being more important, as shown by the topic waves.

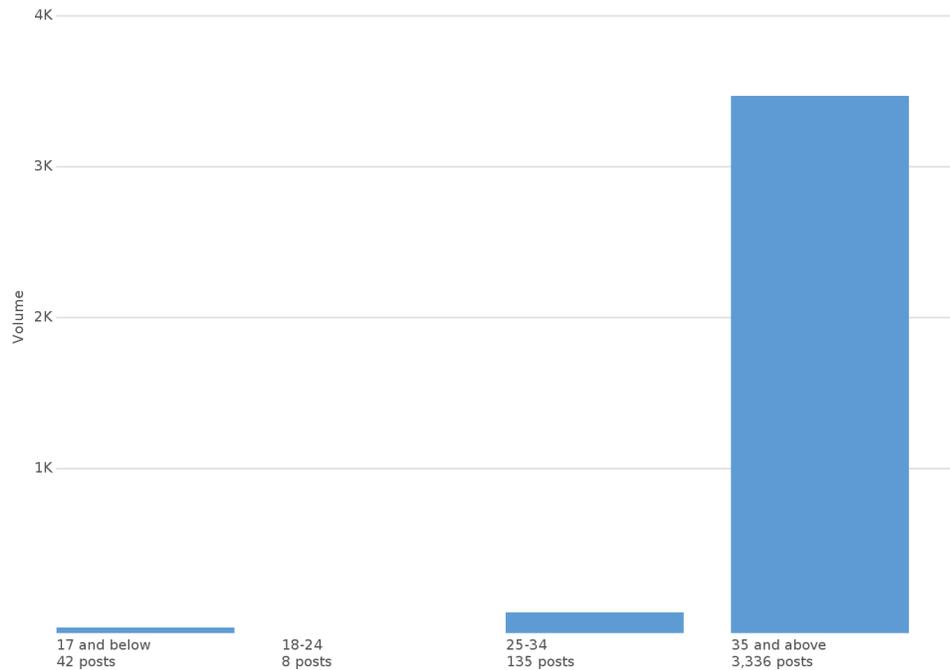
# Older Audiences Interested in Advanced Features

When filtering for interests characteristic of older audiences, we can see that there is much more interest in advanced features, Bluetooth being a huge one. When the audience is 35 years or older, the advanced features become much more important.

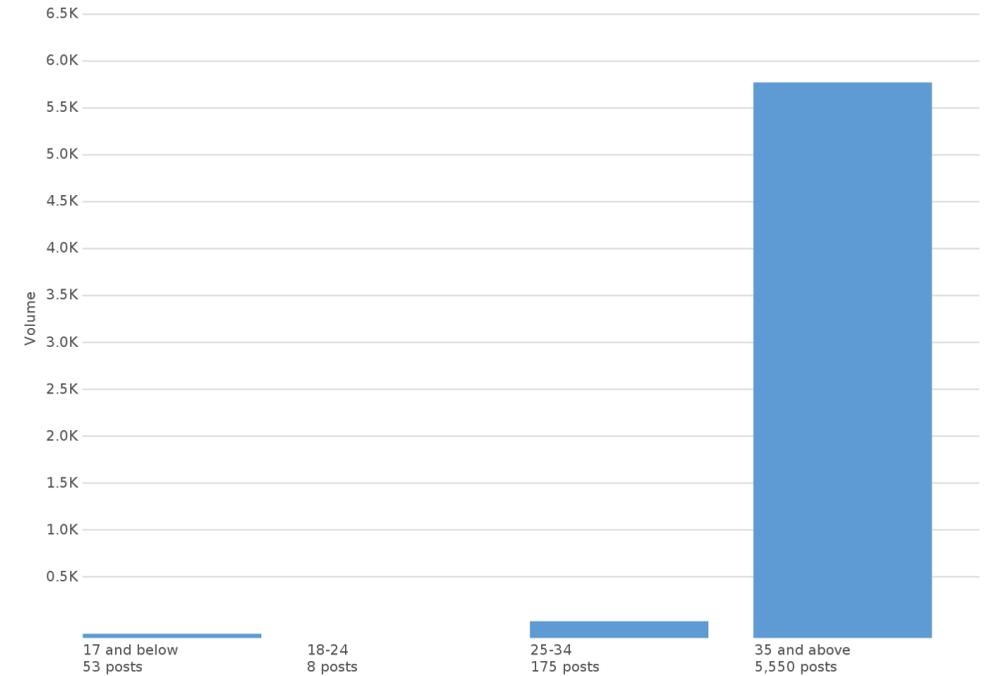


# Generational Skew in Branded Conversation

Applying the same age filter for older interests to both Apple CarPlay and Android Auto, we can see a natural result, the age demographic being skewed towards older audiences.

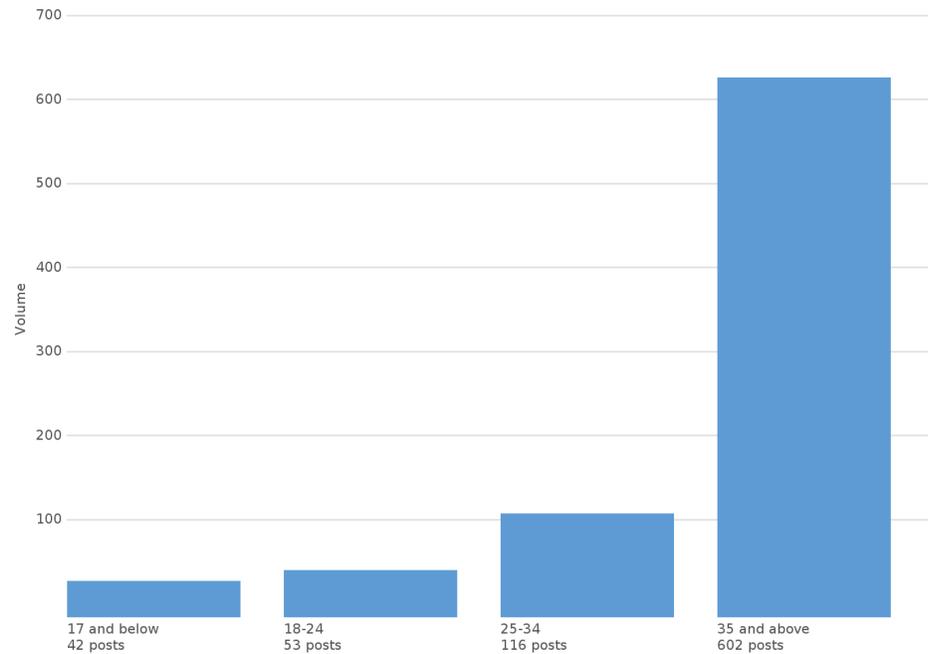


Apple CarPlay: Older - web+rt — Age Breakdown from 2/19/14 to 10/20/15

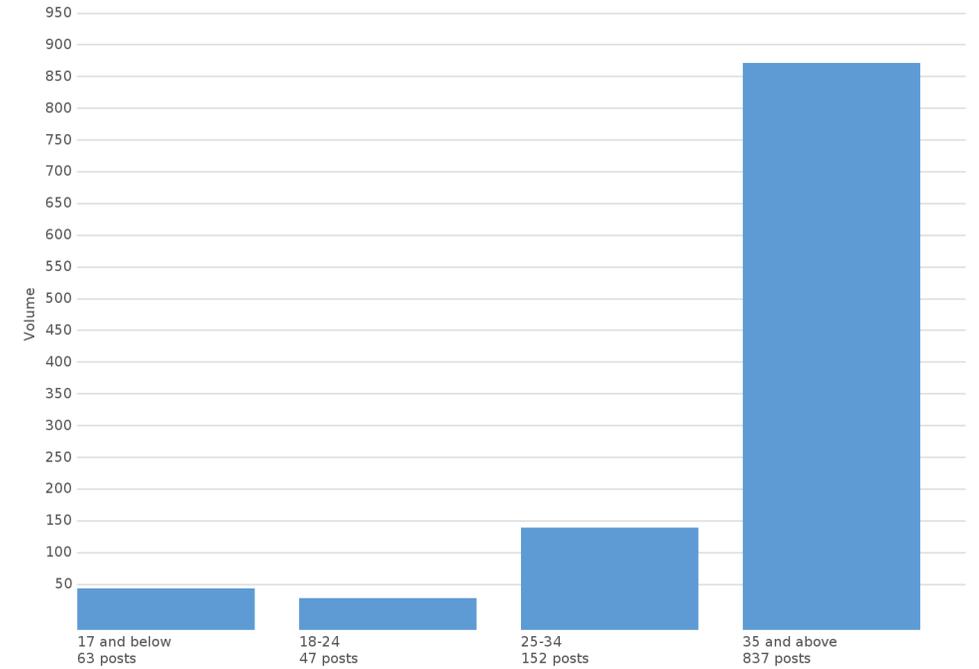


Android Auto: Older — Age Breakdown from 2/19/14 to 10/20/15

# Generational Skew in Branded Conversation



Apple CarPlay: Younger - web + rt — Age Breakdown from 2/19/14 to 10/20/15

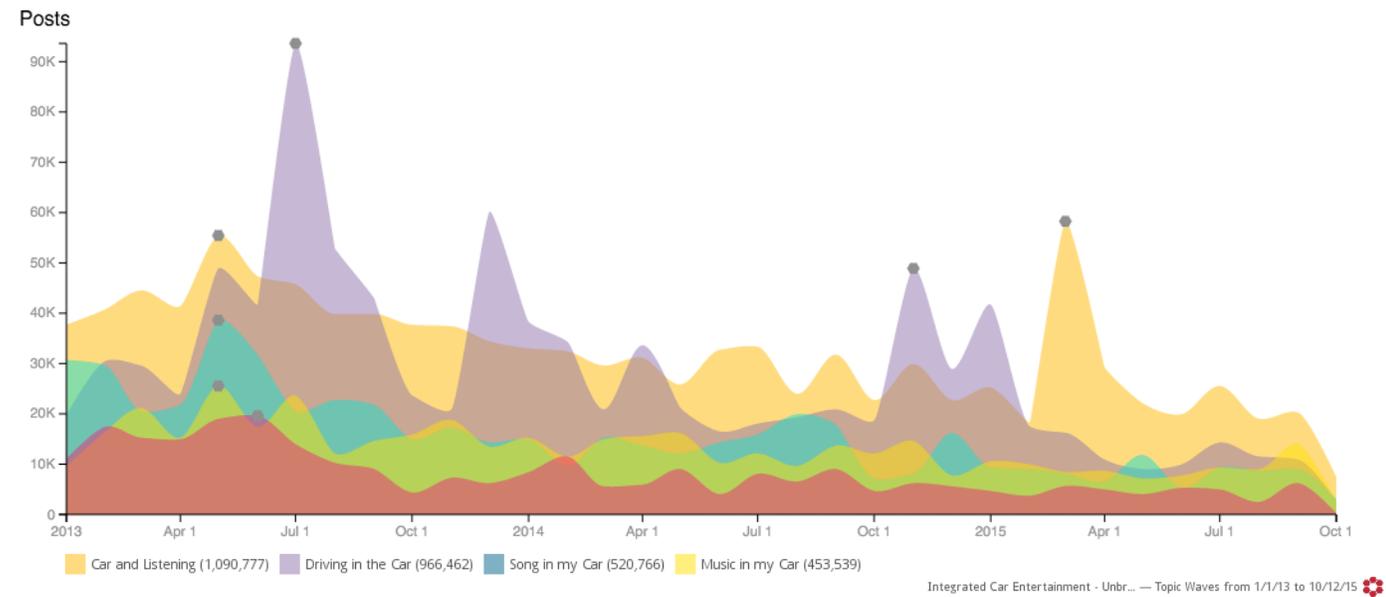
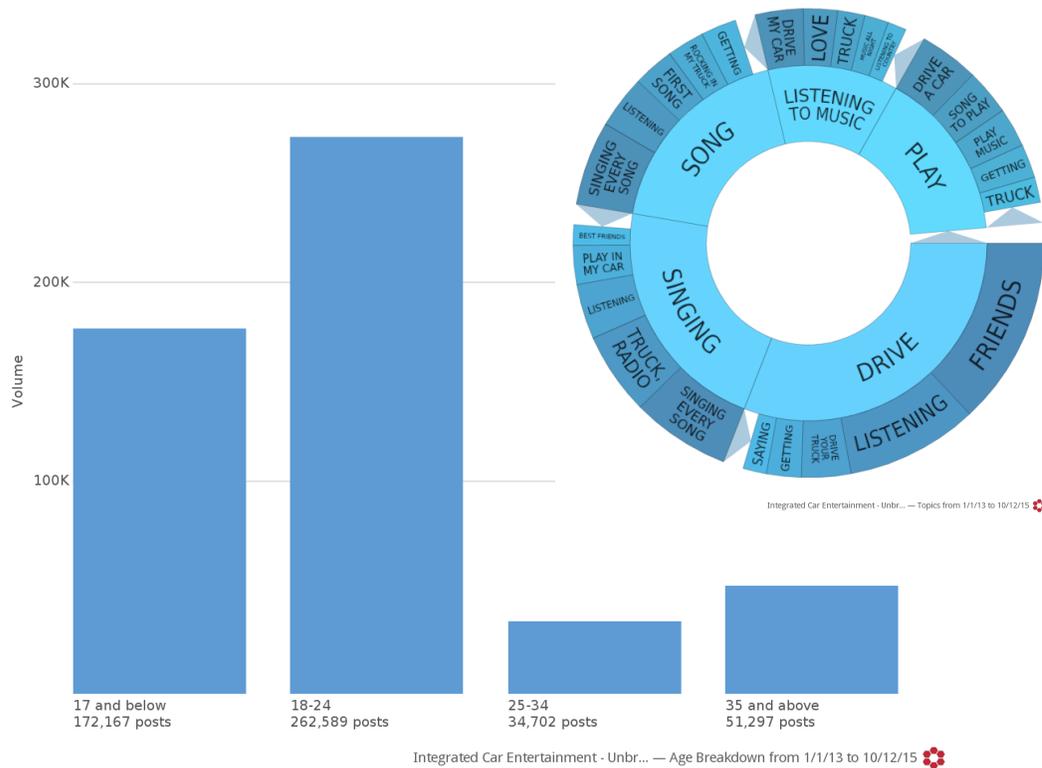


Android Auto: Younger — Age Breakdown from 2/19/14 to 10/20/15

Filtering for younger interests shows an unexpected result. While the demographic has certainly skewed a bit younger, it is still heavily dominated by an older audience. This even further confirms the low interest in more advanced car features from younger audiences.

# Younger Audience Preferences

Alternative to more complex and advanced systems such as Apple CarPlay and Android Auto, younger audiences are much more inclined to be interested in basic car features in their cars, such as auxiliary devices or integrated radio. This could be due to focus in other areas about their cars such as safety, or possibly even due to less access to expensive cars with the advanced features installed.



# Implications for the Automotive and Consumer Electronics Industries

# What does this mean for Auto Industry Professionals?

Young consumers show less interest in more advanced integrated car technologies like Apple CarPlay or Android Auto, which can inform product design specifications greatly. Budget-friendly cars or cars specifically aimed towards millennials and younger audiences may not need to have advanced features in standard packages, allowing for the use of more basic features like a quality radio or auxiliary port. Providing the option to upgrade to more advanced technology can help show the value of an upgraded system, without forcing technology on consumers who won't respond as well to it.

On the other hand, it may be even more important to make advanced features standard on higher end or luxury cars aimed towards an older or more financially comfortable audience. Included advanced features only increase the illusion of value for higher price points, and to an audience who is interested in the technology this could be critical.

# For Consumer Electronic Manufacturers?

If older audiences are more interested in these new integrated systems, how does this affect manufacturers like Apple and Google? When it comes to automotive integrations, safe and effective car integration is a priority, but accessibility and usability must be taken into account also. These qualities are integral for successfully marketing to an older audience. A music integration system that isn't accessible by people with generally less technological experience will frustrate customers and reduce brand adoption.

# Key Findings

- While there are a host of different features among integrated car technologies, Bluetooth remains as one of the top technologies for car owners, particularly for older consumers.
- Younger car owners and consumers are less interested in more advanced technologies in their cars, whether it be for easy usability or lack of funds, they tend to enjoy simplified technologies like using auxiliary ports or the radio.
- Older consumers are generally more concerned with their integrated automotive technologies, talking more about different brands experiences and the features of their car.

# About Crimson Hexagon

Crimson Hexagon is a leading provider of social media analysis software. Powered by patented technology and an in-house data library of more than 500 billion posts, Crimson Hexagon's platform helps hundreds of brands and agencies answer critical business questions through the insights derived from social data. Clients include leading global organizations such as General Mills, Starbucks, Paramount Pictures, Microsoft, and Twitter, and leading agencies such as Translation, Edelman, and We Are Social.

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