China Connected Car Insights 2018

Zooming in on Audi, BMW, Tesla, Chery, Geely, BYD

Data basis and methodology

Goals

- Analysis of consumer discussions on connectivity offering for six automotive producers:
  - Chinese OEMs: Geely, Chery, BYD
  - International OEMs: Audi, BMW, Tesla
- Comparison in terms of sentiment and awareness (mention frequency) for common connectivity features

Data basis

~5M social posts for period February-December 2018, related to the automotive industry

Analysis method

- Anacode's Natural Language Processing
- Extraction of relevant concepts (brands, connectivity features)
- Sentiment analysis (on scale 0 (very negative) to 1 (very positive))

Example analysis

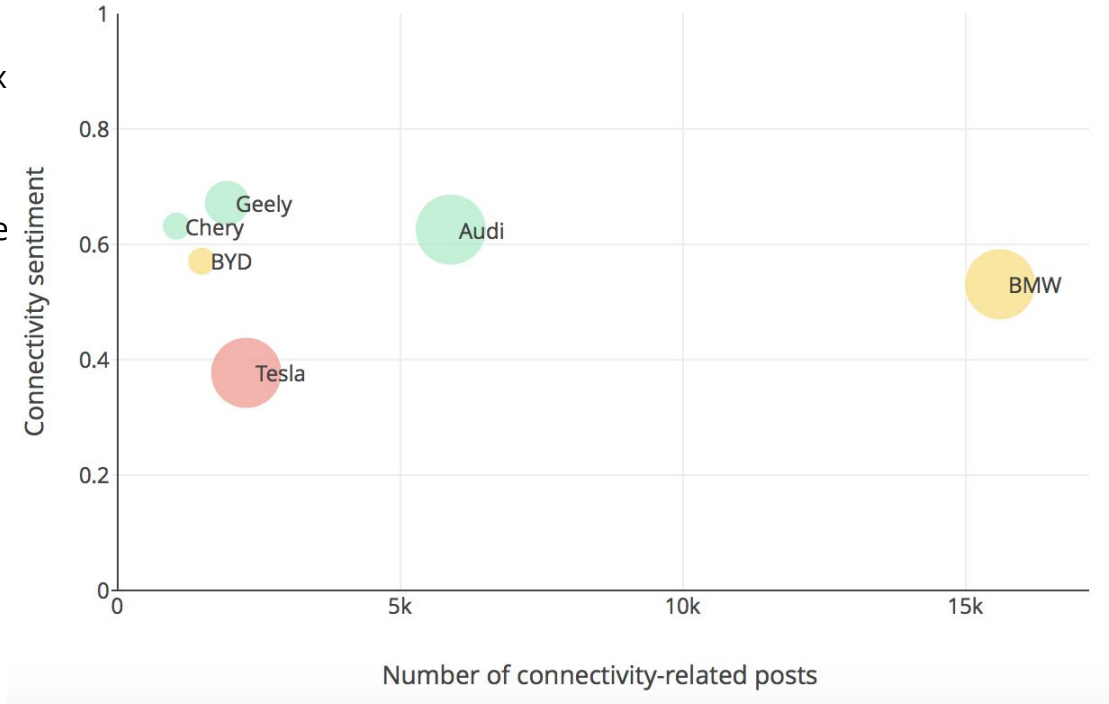
Original post	Brand	Connectivity feature	Sentiment
来看看bmw 7系 (2018)自动泊车的过程[doge]有没有很炫酷~#x_motor	BMW	Autonomous Parking	0.74

References:
[1] Anacode GmbH (2018). Anacode MarketMiner: Web-based Text Analytics for International Market Intelligence. Retrieved from http://anacode.de/wordpress/wp-content/uploads/2017/11/Anacode_Technology_Whitepaper_v1.pdf.

Brand overview

Description

This chart shows the number and sentiment of posts relating to the connectivity offering of the six considered brands. The size of the bubbles corresponds to the relative proportion of connectivity-related posts to all posts about a brand. For example, whereas Geely and Tesla have very similar absolute numbers of connectivity-related posts, the connectivity data make up a larger proportion of the overall data related to Tesla than is the case for Geely.



Key observations

- The relative proportion of connectivity-related data is larger for the foreign brands (Audi, BMW, Tesla) than for the Chinese brands.
- Sentiment is distinctively low for Tesla, and positive for Chery, Geely and Audi.
- BMW is an outlier in that it shows the highest data quantity in absolute terms.

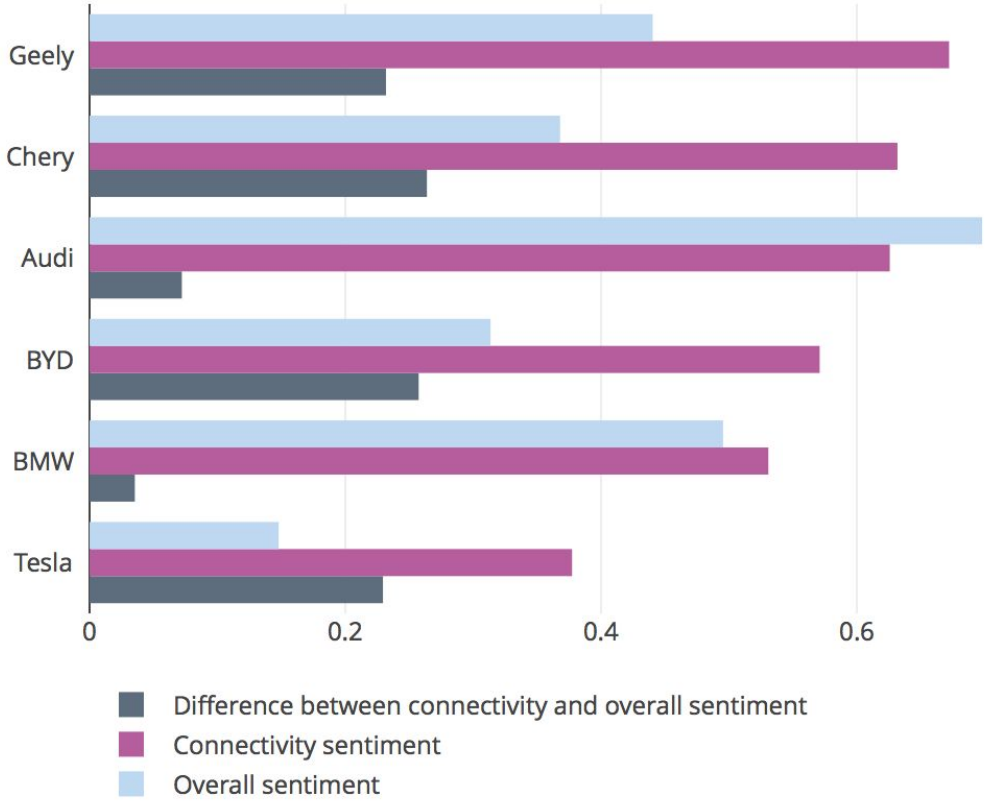
Brand sentiment

Description

This chart further depicts the connectivity-related sentiment for the six considered brands and compares it to the overall sentiment for each brand. It also displays the difference between the overall sentiment and the connectivity sentiment.

Key observations

- The difference between connectivity sentiment and overall sentiment is relatively large for all brands (> 0.2) except Audi and BMW.
- Audi is the only brand where the connectivity sentiment is lower than the overall sentiment. This might be partially explained by the fact that Audi's overall sentiment is extremely high when compared to the other brands.
- Tesla has lowest overall and lowest connectivity sentiment, thus being generally negatively perceived by Chinese consumers.



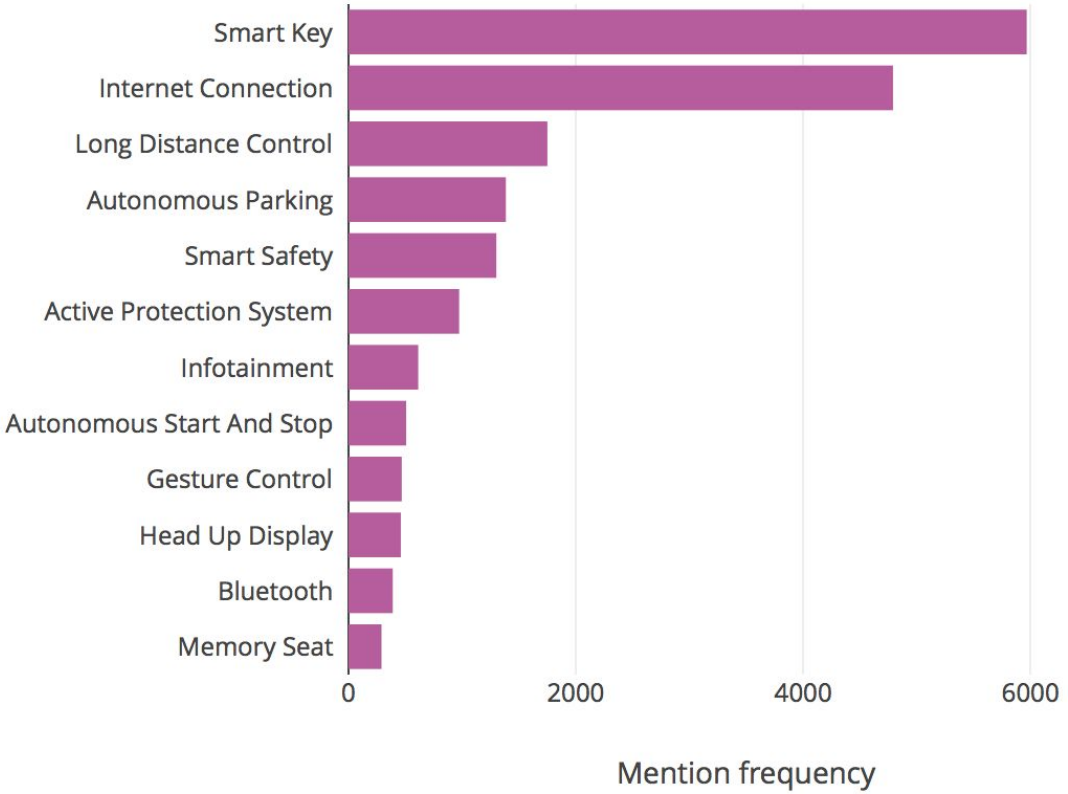
Common connectivity features

Description

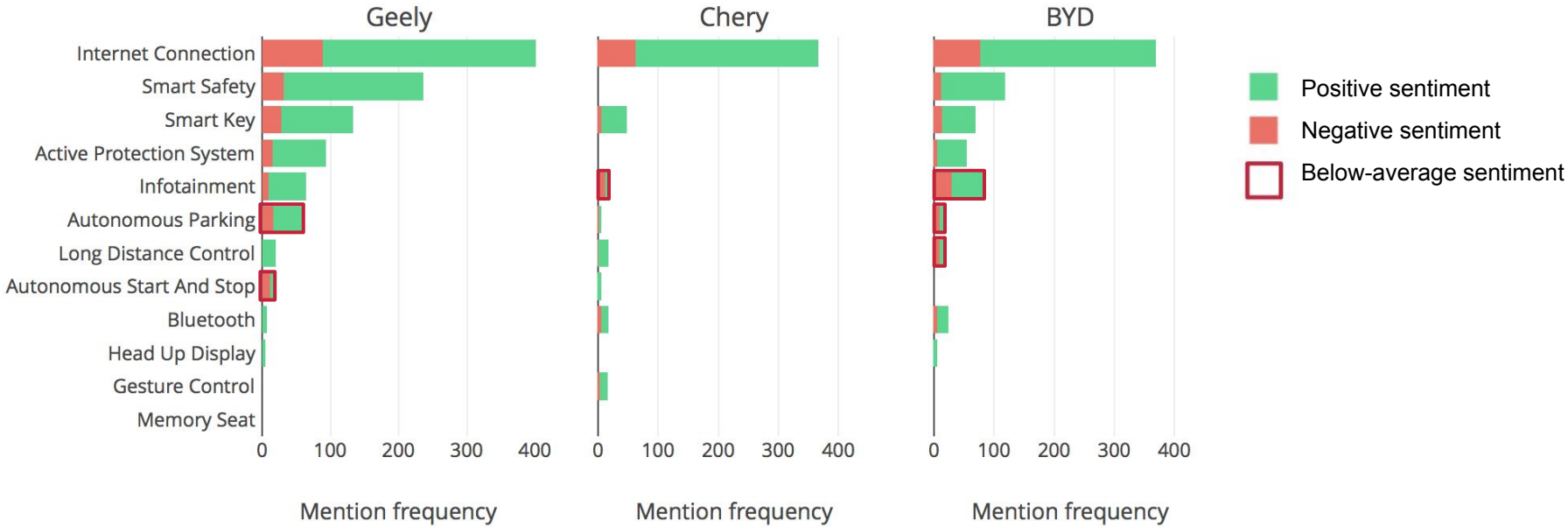
This chart shows frequently discussed connectivity features along with their overall mention frequency aggregated over all brands in the data.

Key observations

- Internet Connection, which pertains to the current 4G standard as well as the upcoming 5G generation, is a major topic of concern.
- The discussion also focuses on features related to assisted driving (Smart Key, LDC, Autonomous Parking) and safety (Smart Safety, Active Protection System).
- Infotainment, which includes functionality such as Music Streaming and Traffic Information, is relatively low in terms of prominence. This might relate to the fact that independent infotainment services are more popular among Chinese consumers.



Comparing connectivity features for Geely / Chery / BYD



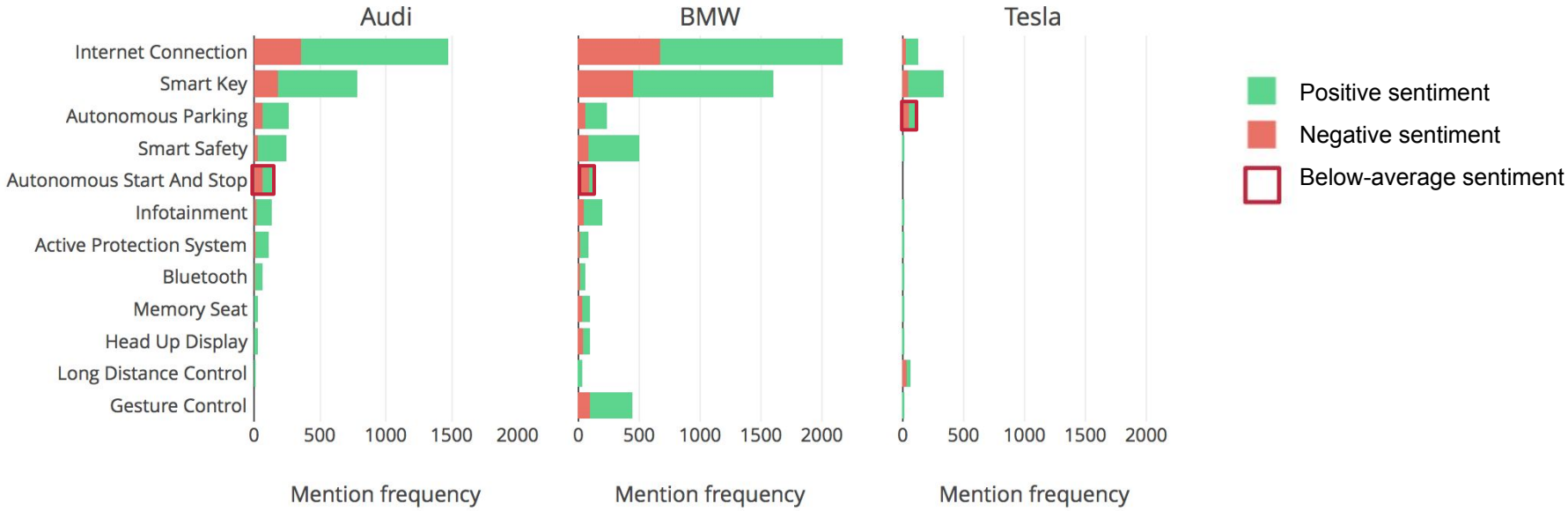
Description

This chart aggregates the discussion for the 12 popular connectivity features for Geely, Chery and BYD. It shows both the mention frequency and the sentiment for each of the features. The features are ordered according to frequency of mention for Geely.

Key observations

- Chery shows very few data on typical features such as Smart Safety, Autonomous Parking and Active Protection System.
- Relatively negative sentiments are shown for Geely's Autonomous Parking / Start and Stop, Chery's Infotainment and BYD's Infotainment, Autonomous Parking and Long Distance Control. Thus, these items manifest potential points for improvement.

Comparing connectivity features for Audi / BMW / Tesla



Description

This chart aggregates the discussion for the 12 popular connectivity features for Audi, BMW and Tesla. It shows the mention frequency and the sentiment for each of the features. The features are ordered according to frequency of mention for Audi.

Key observations

- BMW shows the highest data quantity, whereas Tesla shows the lowest data quantity.
- Relatively negative sentiments are shown for Audi's and BMW's Autonomous Start and Stop and Tesla's Autonomous Parking.
- Gesture Control functionality is clearly prominent for BMW, where it is mostly discussed in the context of 7 Series,

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