REV UP THE ENGINES

Automotive Industry Digital Due Diligence With Investor Insights

2024 EDITION

COGNITIVECREATORS
THINK TRANSITION

This white paper represents the first pillar of a comprehensive Digital Due Diligence (DDD) framework. It focuses on **Digital Trends & Industry Insights** and does not constitute a full analysis.

The data presented is historical (analysis conducted at the beginning of 2024 based on 2023 data); for investors interested in this segment or industry, the latest insights can be provided upon request.

The complete 360-degree DDD assessment also includes additional key pillars that are **not covered in this document**, such as:

- Technology Ecosystem and MarTech Stack Analysis
- Technology Capability Assessment
- Brand Performance Audit (data-driven evaluation of historical digital performance)
- Reputational Risk Analysis (Brand sentiment analysis)

EXECUTIVE SUMMARY WITH INVESTOR INSIGHTS

Sales and Marketing Personalisation is the untapped accelerator for stagnating brands.

There is a white space for value creation through CX transformation, enabled by hyper-personalisation, CDPs (Customer Data Platforms), and real-time behavioural data.

Investing in these enablers, either within brands or as third-party solutions, offers strong upside. In a downtrend or economic slowdown, sales performance becomes even more critical, personalisation can be the decisive lever that sustains growth when broader demand is under pressure.

Digital insights from Digital Due Diligence

80% of brands fail to implement real-time contextual personalisation, despite high digital traffic or social volume.

Brands like Hyundai and Lexus, despite growing visibility, underinvest in experience delivery.

$4.9B – $36.9B

(0.2–1.5%+ of total revenue)

Missed revenue opportunity (2023, 20 brands analyzed)

With effective marketing and sales personalisation, automotive brands could capture an additional 0.2–1.5%+ in revenue uplift.

EXECUTIVE SUMMARY WITH INVESTOR INSIGHTS

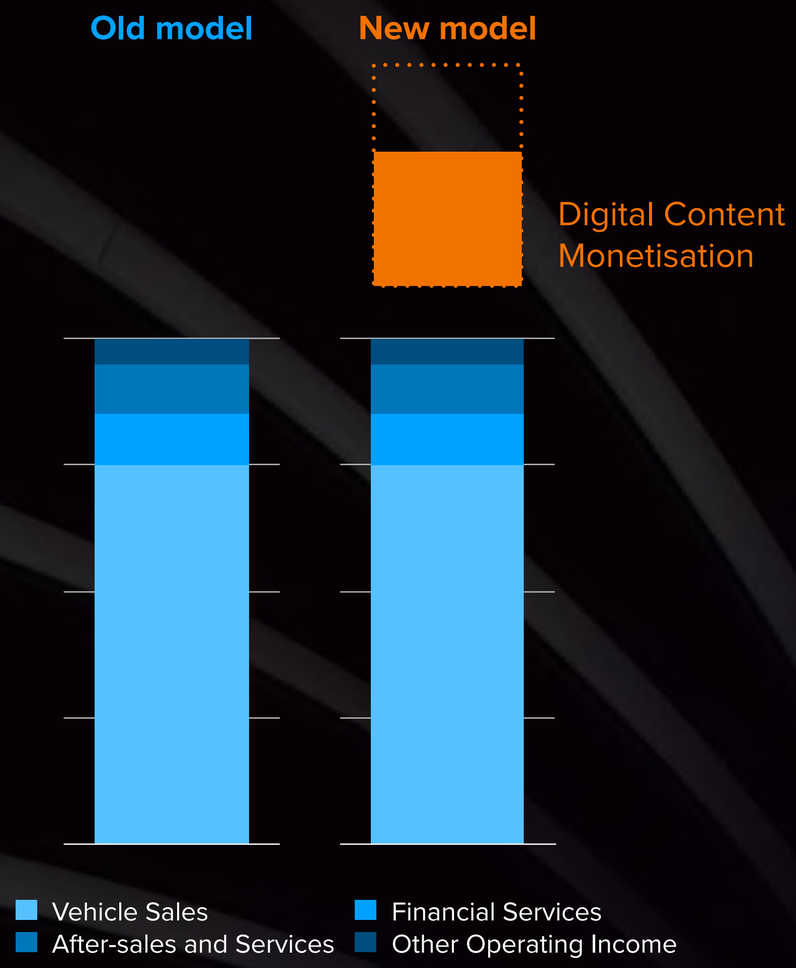
Luxury & Performance Brands Provide Durable Brand Equity and Monetisation Leverage

These brands represent premium audience clusters ripe for personalisation, lifestyle branding, and digital content monetisation (e.g., Web3 fan engagement, racing franchises, or data services).

Digital insights from Digital Due Diligence

Ferrari, Porsche, and Tesla show strong digital performance (18% + social growth, robust organic visibility) alongside high R&D-to-sales ratios (Ferrari leads with ~15%+).

Ferrari maintains 21.7% of OpEx dedicated to R&D, a signal of strong innovation DNA in a high-margin business.



EXECUTIVE SUMMARY WITH INVESTOR INSIGHTS

+533%
search demand

+93%
social growth

42%
YoY revenue growth

X2
of R&D investment

BYD and electrified challengers are rewriting the digital growth playbook

Brands with EV focus and digital traction offer short-to-mid term monetisation and long-term strategic value.

These companies are ideal targets for capital deployment in innovation, personalisation tech, and market expansion

Digital insights from Digital Due Diligence

BYD has demonstrated a +533% surge in search demand, +93% social growth, and 42% YoY revenue growth, backed by a doubling of R&D spend.

This signals a rare intersection of operational momentum and digital market pull, suggesting high ROI potential in emerging markets, particularly in EV infrastructure, battery tech, and direct-to-consumer (DTC) models.

Brands like BYD are also digital-first in behaviour, attracting younger, tech-savvy audiences with minimal legacy constraints.

EXECUTIVE SUMMARY WITH INVESTOR INSIGHTS

In short term: Digital Attention ≠ Operational Efficiency or Revenue Growth

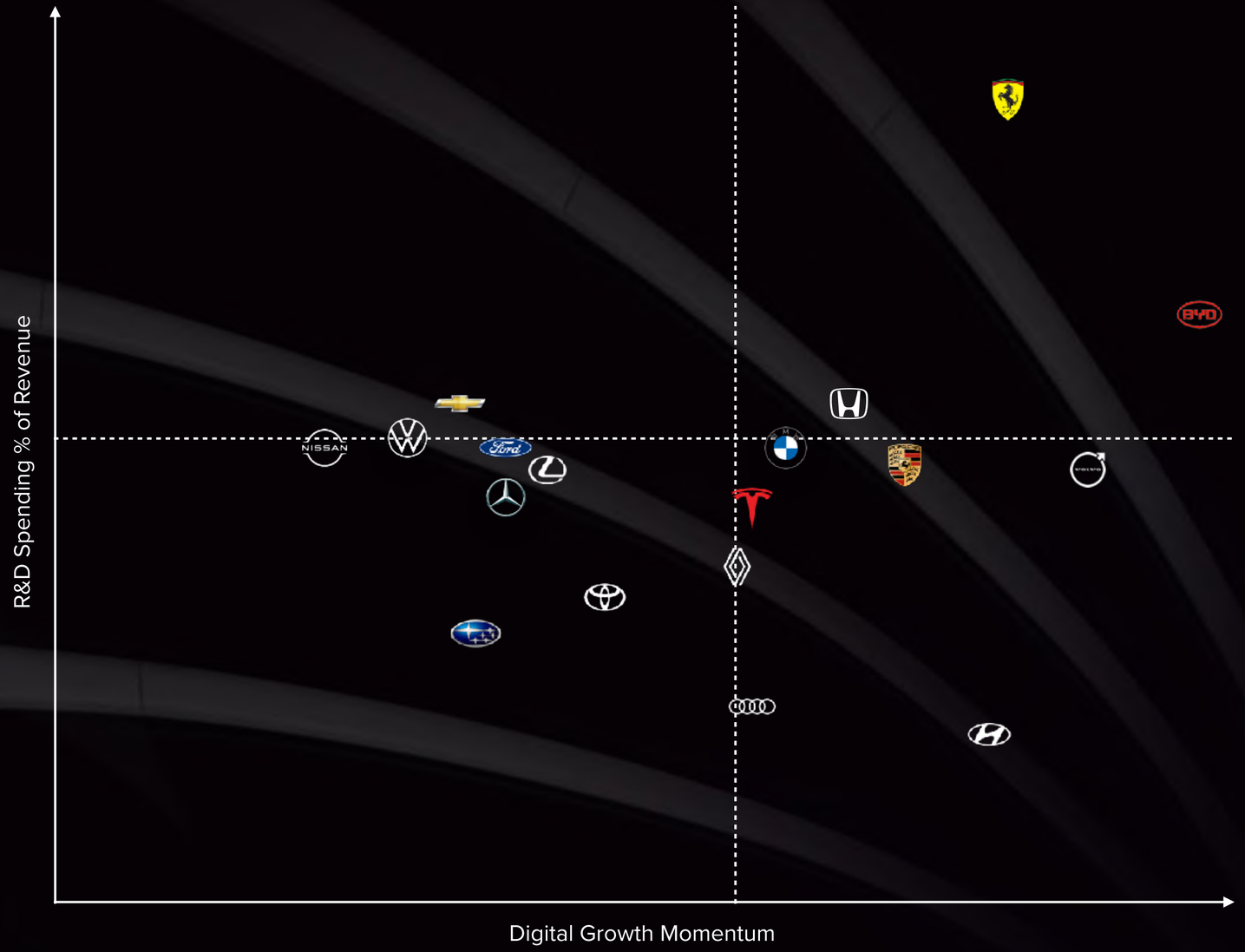
In long term: Digital Attention = Operational Efficiency or Revenue Growth

High digital visibility without matched R&D intensity or experience innovation can inflate brand value perception but underdeliver on actual returns. Diligence must go beyond surface metrics.

Digital insights from Digital Due Diligence

Audi dropped from 7.45% to 2.21% R&D/OpEx ratio despite +13% revenue growth, a sign of declining innovation intensity.

Tesla continues to deliver strong digital traction, with +2.9M organic traffic growth. However, R&D spend growth lags behind revenue growth, and tightening margins due to price pressures point to a less favourable balance between top-line expansion and profitability.



Digital Growth: measured by social media follower growth (absolute and %) and organic search/keyword changes
R&D Spending: both absolute amount and % of revenue

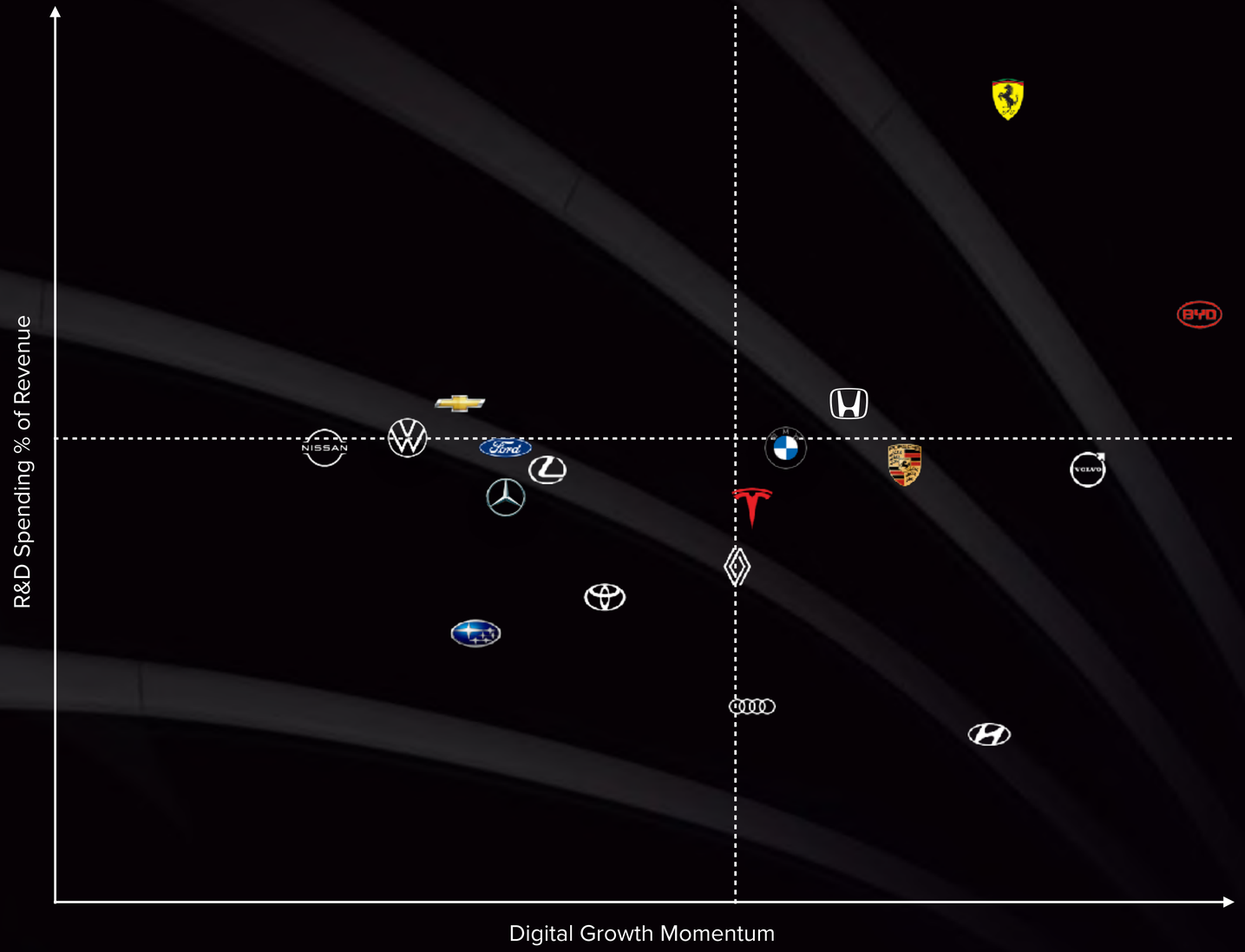
EXECUTIVE SUMMARY WITH INVESTOR INSIGHTS

High digital attention + low R&D % → Over-promising / risk of under-delivering (e.g., Hyundai, Audi).

Low digital attention + high R&D % → Under-leveraging innovation / risk of under-promising (e.g., Volkswagen, Nissan).

Balanced digital growth + solid R&D → Aligned expectations (BMW, Tesla, Porsche, Ferrari).

Very high R&D % + strong digital → Can justify premium positioning, but risk of high expectations (Ferrari).



Digital Growth: measured by social media follower growth (absolute and %) and organic search/keyword changes
R&D Spending: both absolute amount and % of revenue

EXECUTIVE SUMMARY WITH INVESTOR INSIGHTS

Legacy Brands are Losing Organic Ground Despite High Spend

Without clear linkage between R&D, content, and consumer experience, these brands risk further brand erosion and customer defection. Investing in these brands may require active transformation strategies.

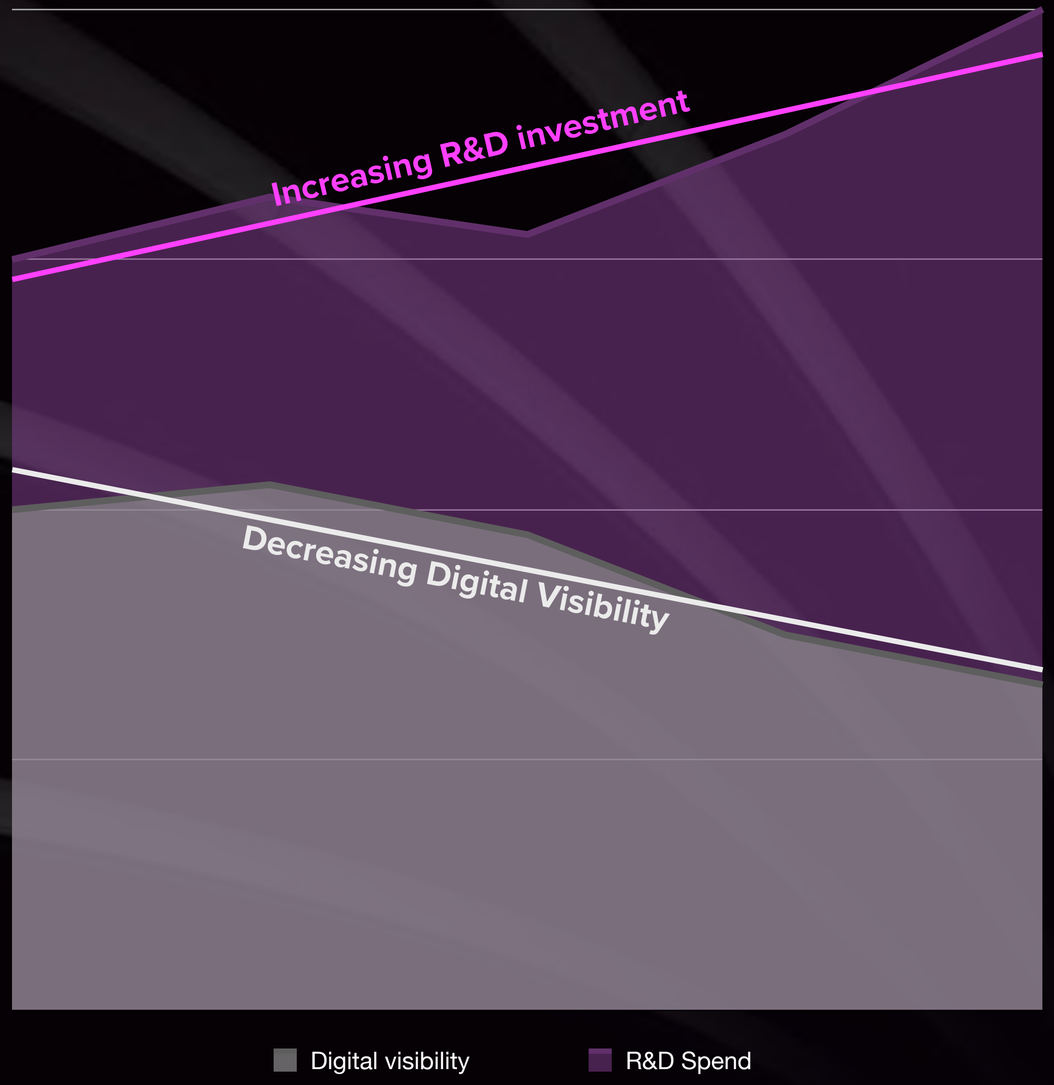
Innovation provides the foundation, but digital visibility ensures that innovation is understood, valued, and demanded by consumers.

When R&D investment and digital visibility are aligned, brands not only deliver on their promises but also strengthen trust, engagement, and market position.

This alignment transforms digital attention into measurable sales performance while sustaining the innovation cycle for long-term growth.

Digital insights from Digital Due Diligence

Ford, Chevrolet, and Mercedes-Benz saw significant drops in organic visibility and keyword rankings, despite $6B–$9B in R&D spend. This points to a misalignment between digital strategy and real innovation storytelling.



EXECUTIVE SUMMARY WITH INVESTOR INSIGHTS

R&D ROI Must Be Measured with Digital Pull, Not Spend Alone

The volume of R&D investment is not a sufficient indicator of competitive strength; it must be evaluated in tandem with digital visibility metrics such as organic growth, popularity traction, and fan engagement to reveal true market leverage. **Innovation only generates ROI when it is effectively translated into digital pull that shapes consumer preference, strengthens brand equity, and drives sales conversion.** Therefore, leadership must treat R&D and digital visibility as interdependent levers of growth, ensuring that every dollar spent on innovation is amplified through digital attention and consumer engagement.

Digital Demand Signals Must Inform Capital Allocation

Search volume growth (e.g., Porsche +40%, Lexus +22%) reveals consumer intent hotspots. These should be prioritized for campaign investment, product localization, or D2C rollout.

Sales and Marketing Personalization is the Most Undervalued Growth Lever in Automotive

Despite massive digital traffic and engagement, contextual experience delivery is missing. Brands that build personalization infrastructure can unlock double-digit revenue uplift through loyalty, lifetime value growth, and lower CAC.

Legacy Is Not Safety Without Digital Reinvention

Brands like Ford and Chevrolet still spend heavily in R&D, however there is no visible gains in organic penetration or social media awareness, their innovation efforts are not translating into brand energy.

Brand	Observation / Potential Risk
BMW	High digital growth + solid R&D → aligned expectations
Volvo	High digital growth %, decent R&D → slightly over-promising
Ferrari	High R&D % with strong digital → expectations can be high and justified
Hyundai	Strong digital growth, very low R&D → risk of over-promising
Tesla	Strong digital growth + good R&D → expectations reasonable
Audi	Moderate digital attention but very low R&D % → risk of over-promising
Ford	Moderate digital growth, good R&D → may under-deliver digitally
Lexus	Moderate digital, high absolute R&D → may under-leverage digital
Renault	Moderate digital + R&D → neutral risk
Toyota	Moderate digital growth vs solid R&D → conservative risk
Honda	Balanced digital vs R&D
Porsche	Balanced growth and R&D → aligned
BYD	Modest social base, strong R&D % → potential under-promising
Mercedes-Benz	Strong R&D vs modest digital → potential under-promising
Nissan	Low digital attention vs high R&D → under-promising
Subaru	Low digital and modest R&D → moderate risk
Volkswagen	High R&D, weak digital → risk of under-leveraged digital assets
Chevrolet	Limited digital growth vs high R&D → under-leveraged digital

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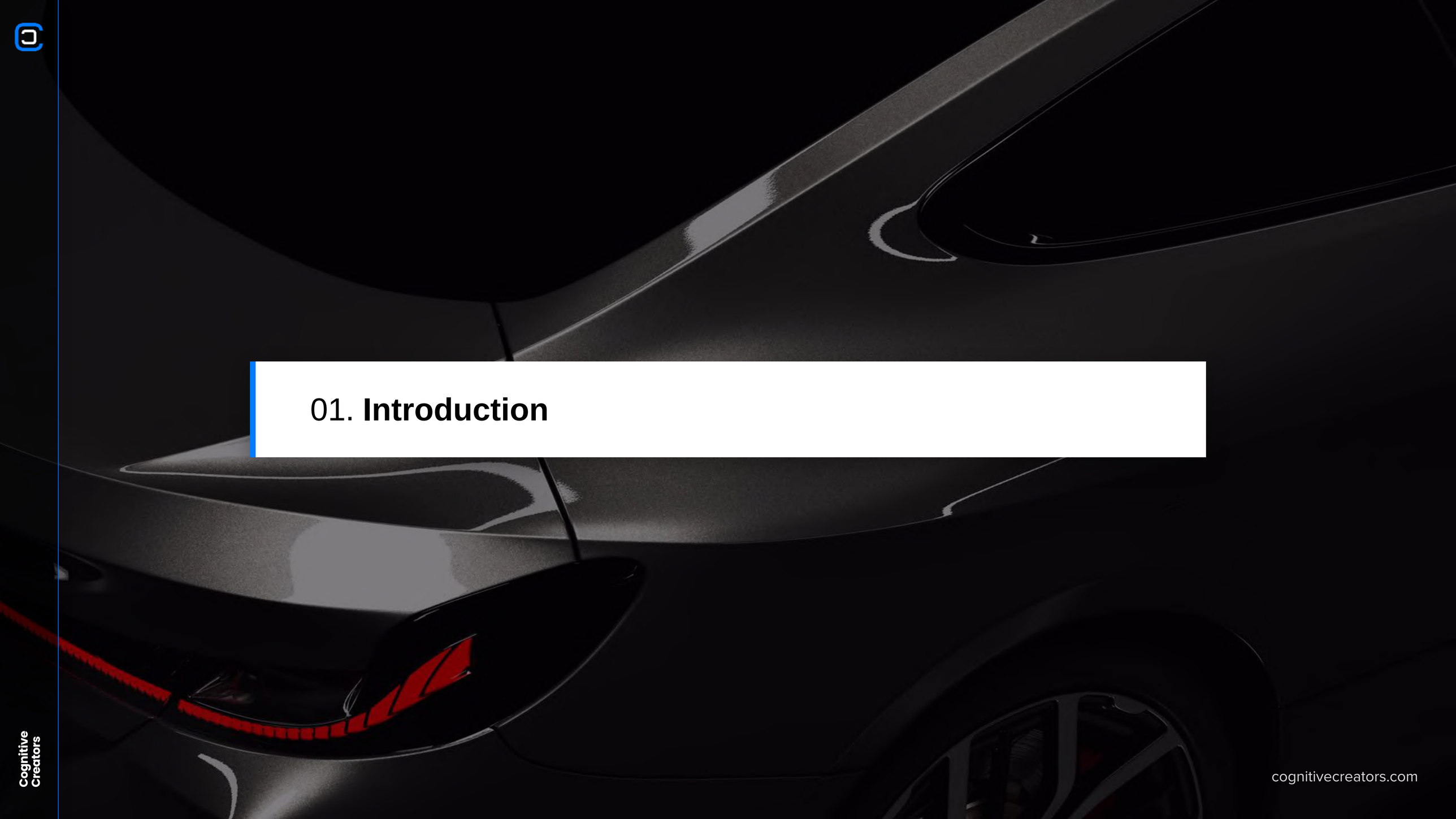
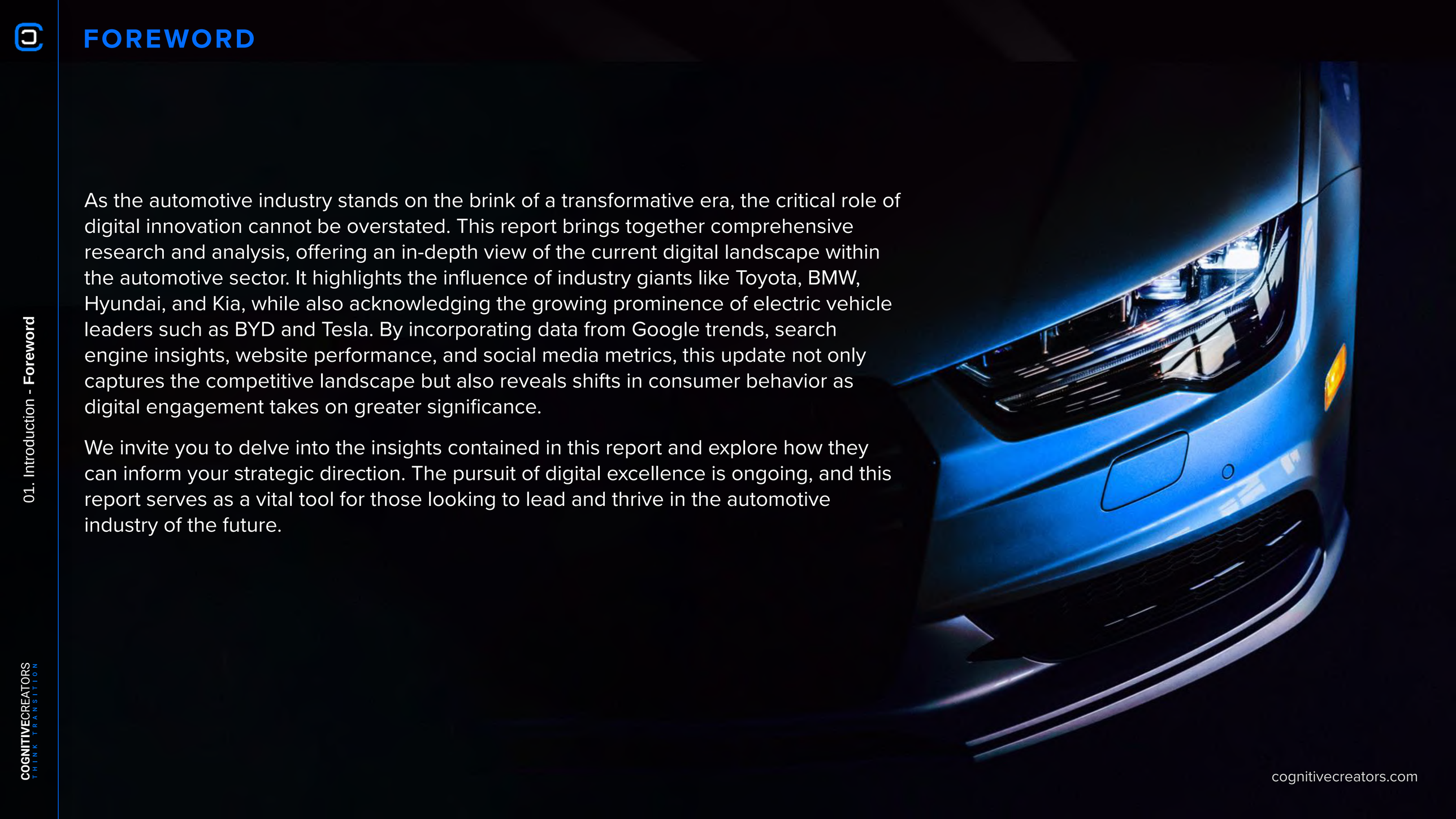


01. **Introduction**

FOREWORD



As the automotive industry stands on the brink of a transformative era, the critical role of digital innovation cannot be overstated. This report brings together comprehensive research and analysis, offering an in-depth view of the current digital landscape within the automotive sector. It highlights the influence of industry giants like Toyota, BMW, Hyundai, and Kia, while also acknowledging the growing prominence of electric vehicle leaders such as BYD and Tesla. By incorporating data from Google trends, search engine insights, website performance, and social media metrics, this update not only captures the competitive landscape but also reveals shifts in consumer behavior as digital engagement takes on greater significance.

We invite you to delve into the insights contained in this report and explore how they can inform your strategic direction. The pursuit of digital excellence is ongoing, and this report serves as a vital tool for those looking to lead and thrive in the automotive industry of the future.

WHAT DOES IT STAND FOR?

Scope

To accurately define a company's current digital status taking into account the industry specifics, brand positioning, and applicable trends, a Digital Due Diligence (DDD) analysis is necessary.

DDD provides a comprehensive understanding of an organisation's digital landscape, outlining where the company stands relative to its industry peers, how it's been positioned within the market, and where potential growth paths may be.

USP

By thoroughly examining the mentioned factors, we can create a strategic roadmap to progress and optimise our clients' digital presence.

A well-executed DDD enables organisations to make informed decisions about their digital strategy, optimise their online presence, and maximise the return on investment.

Who is it for?

1. For businesses and/or investors who need to assess the digital brand value of a potential target prior to an acquisition
2. For businesses that have a well-established physical-first model but recognised the need to level up their digital presence for business growth

Benefits

1. Understand the risks that you need to mitigate
2. Learn about relevant opportunities both short- and long-term
3. See strategic directions that have the most potential for digital growth

TIME TO SHIFT INTO GEAR

To better understand the DDD's practical benefits, we have conducted a comprehensive Digital Due Diligence analysis on today's 20 most valued automotive brands.

This analysis is grounded in data collected in **March 2024**, with the top 20 automotive brands selected based on insights from **Brand Finance's Automotive Industry Report (2024)**. In our previous DDD analysis, the ranking was drawn from the 2022 report. **A key shift in the 2024 report is the replacement of two brands in the top 20**: Land Rover and Haval have exited, while GMC and KIA have entered the list.

The analysis focuses on the EU, USA, Oceania, Japan, and South Korea, providing a comprehensive view of the digital performance of the selected automotive brands within these regions and countries.

The main question explored throughout this white paper is how efficiently these brands apply digital strategies to achieve **higher rankings** in the digital landscape. Furthermore, we aim to determine the correlations between their **brand value**, **digital efforts** and **achievements**.

Let’s kick things into high gear to showcase the advantages of a **DDD** and make you see clearly how it can help your business.

This white paper serves as a representation of a DDD’s main pillars, but it doesn’t represent the complete analysis that also involves an in-depth exploration of a wide range of business-specific data.

WHAT DOES IT STAND FOR?

The list of brands analysed in this DDD is based on the **Brand Finance Automotive Industry** report published in **2024.**

The previous analysis, conducted in 2023, was based on data from Brand Finance's Automotive Industry Report (2022). In the latest 2024 ranking, two significant changes have occurred: Land Rover and Haval have been replaced by GMC and KIA.

Top 20 Automotive Brand Value Rankings (2022)

1	Toyota
2	Mercedes-Benz
3	Tesla
4	Volkswagen
5	BMW
6	Porsche
7	Honda
8	Ford
9	Nissan
10	Volvo
11	Audi
12	Hyundai
13	Chevrolet
14	Lexus
15	Land Rover
16	Renault
17	Ferrari
18	Subaru
19	BYD
20	Haval

Top 20 Automotive Brand Value Rankings (2024)

1	Mercedes-Benz
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6	Volkswagen
7	Honda
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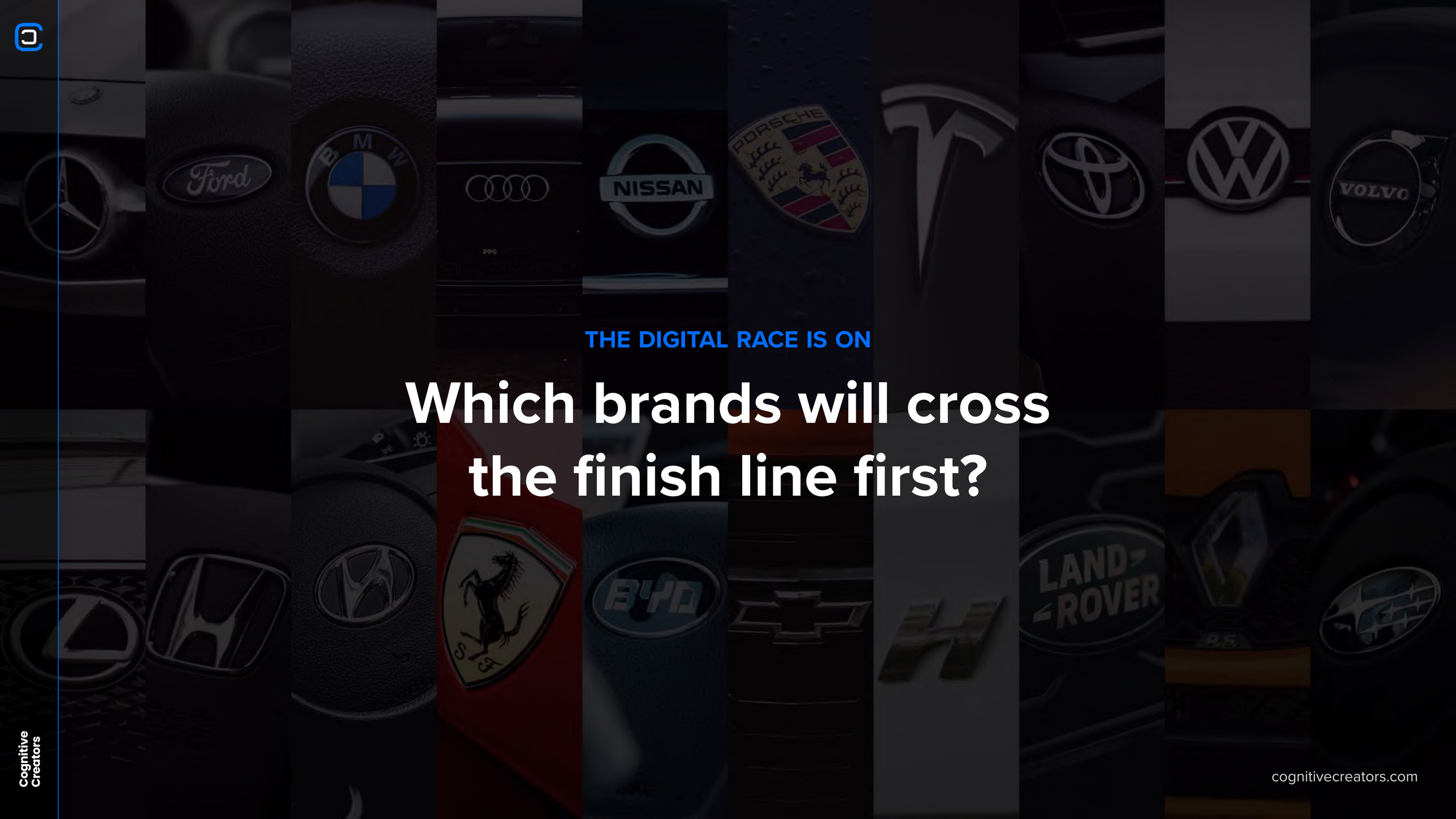
9	Ford
10	Audi
11	BYD
12	Nissan
13	Volvo
14	Ferrari
15	Chevrolet
16	Kia
17	Lexus
18	Subaru
19	Renault
20	GMC

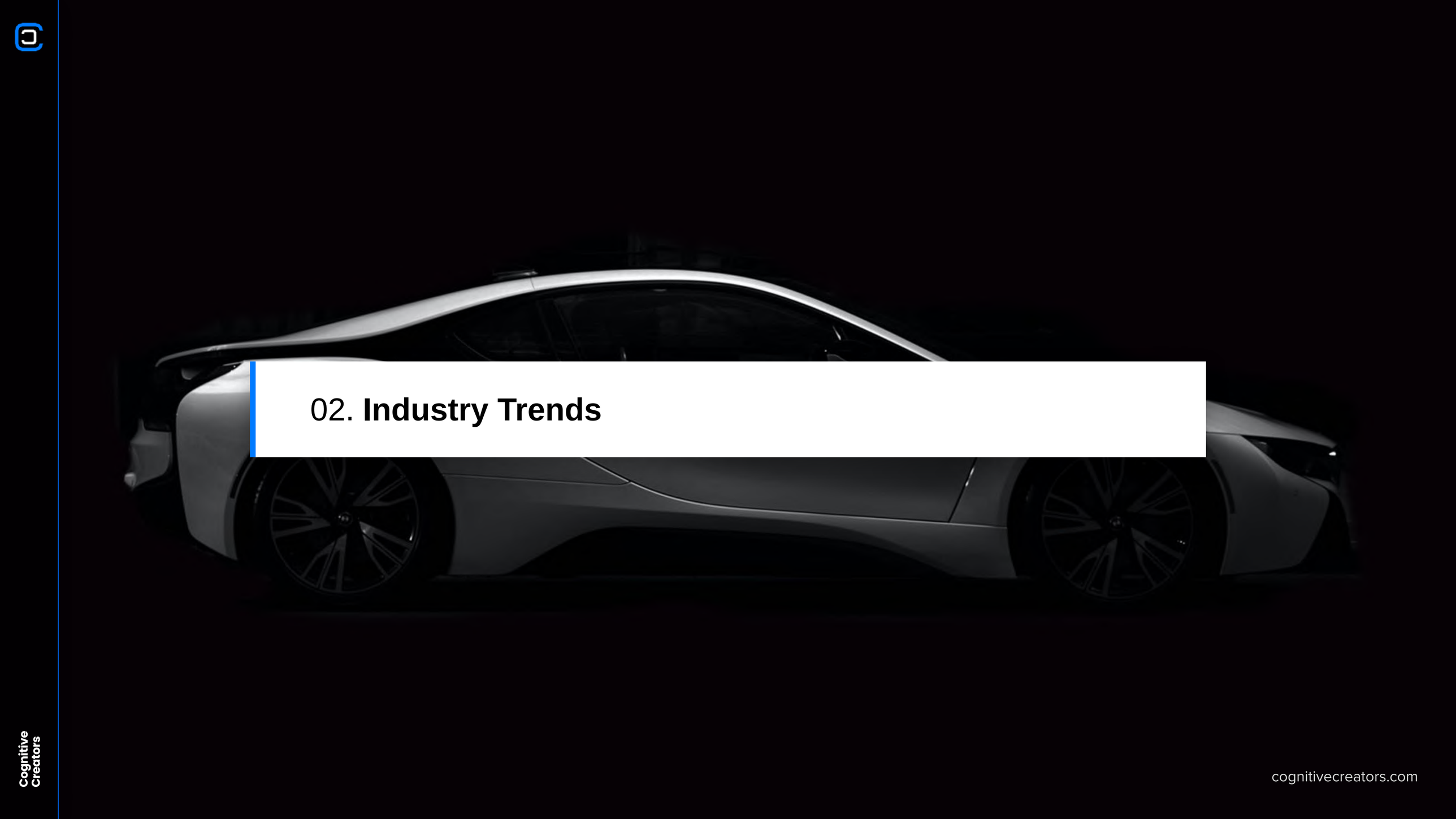


THE DIGITAL RACE IS ON

Which brands will cross the finish line first?

Cognitive Creators

cognitivecreators.com



02. **Industry Trends**

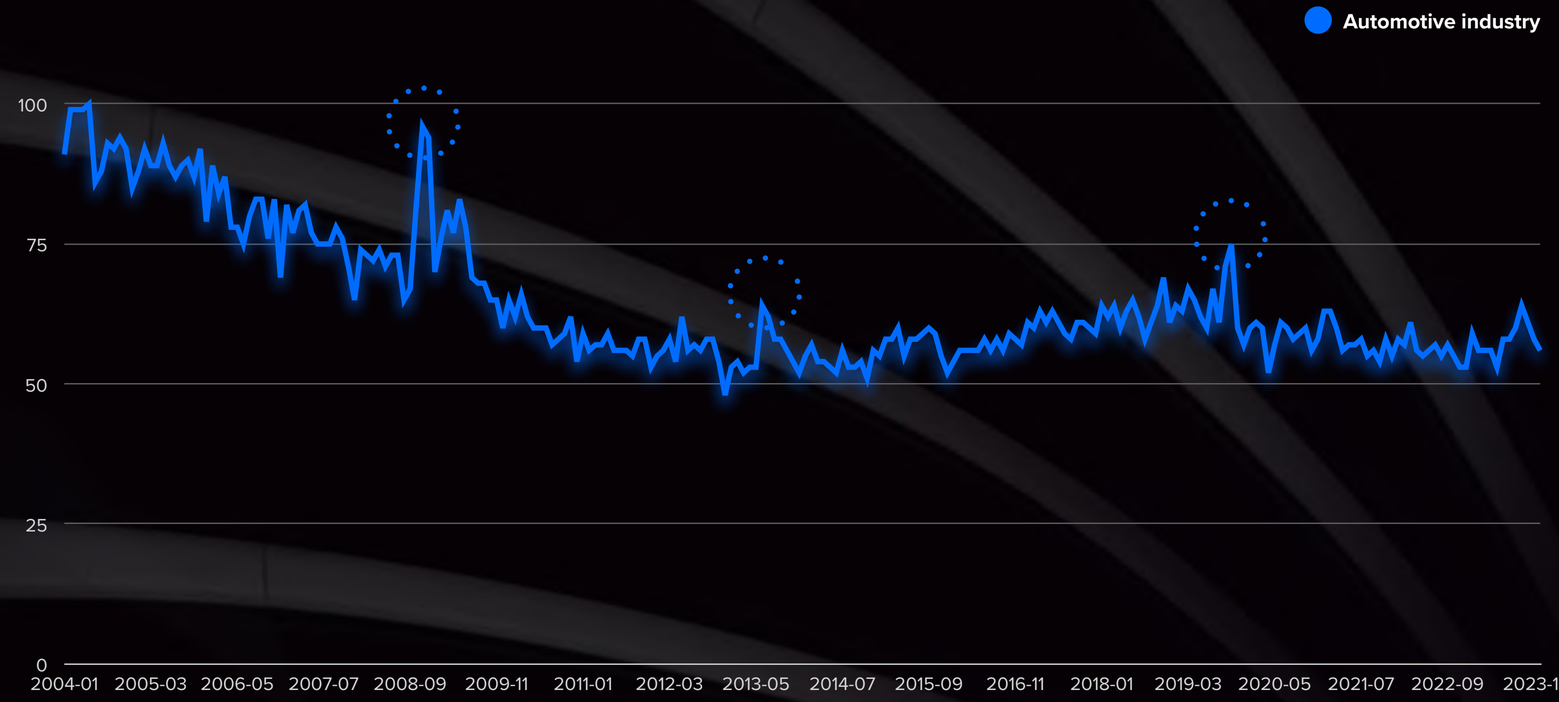
INTEREST OVER TIME

Interest in the automotive industry has been steadily slowing down over the past 20 years, but it tends to surge during periods of general economic slowdowns, recoveries, and with the emergence of new trends.

In 2008 during the financial crisis, as well as in 2013 and 2019 during times of recovery and improvement, the industry witnessed its highest points over the past 20 years. The financial crisis played a significant role in reshaping strategies and fostering innovation within automotive companies, while the growing popularity of online platforms led to digital transformation, investment in online platforms, and exploration of new business models. In 2013, the industry began its recovery from the global financial crisis, coinciding with the rise of electric vehicles and the emergence of automotive e-commerce platforms like Carvana, Wroom, and Shift. By 2019, the electric vehicle market experienced substantial growth, with over 10 million electric cars on the roads in 2020 and a significant increase in available models. This disruptive shift not only impacted the automotive industry but also affected the entire EV value chain and ecosystem.

Google Trends normalises search data to make comparisons between terms easier. Search results are normalised to the time and location of a query by the following process: each data point is divided by the total searches of the corresponding geography and time range to compare relative popularity.

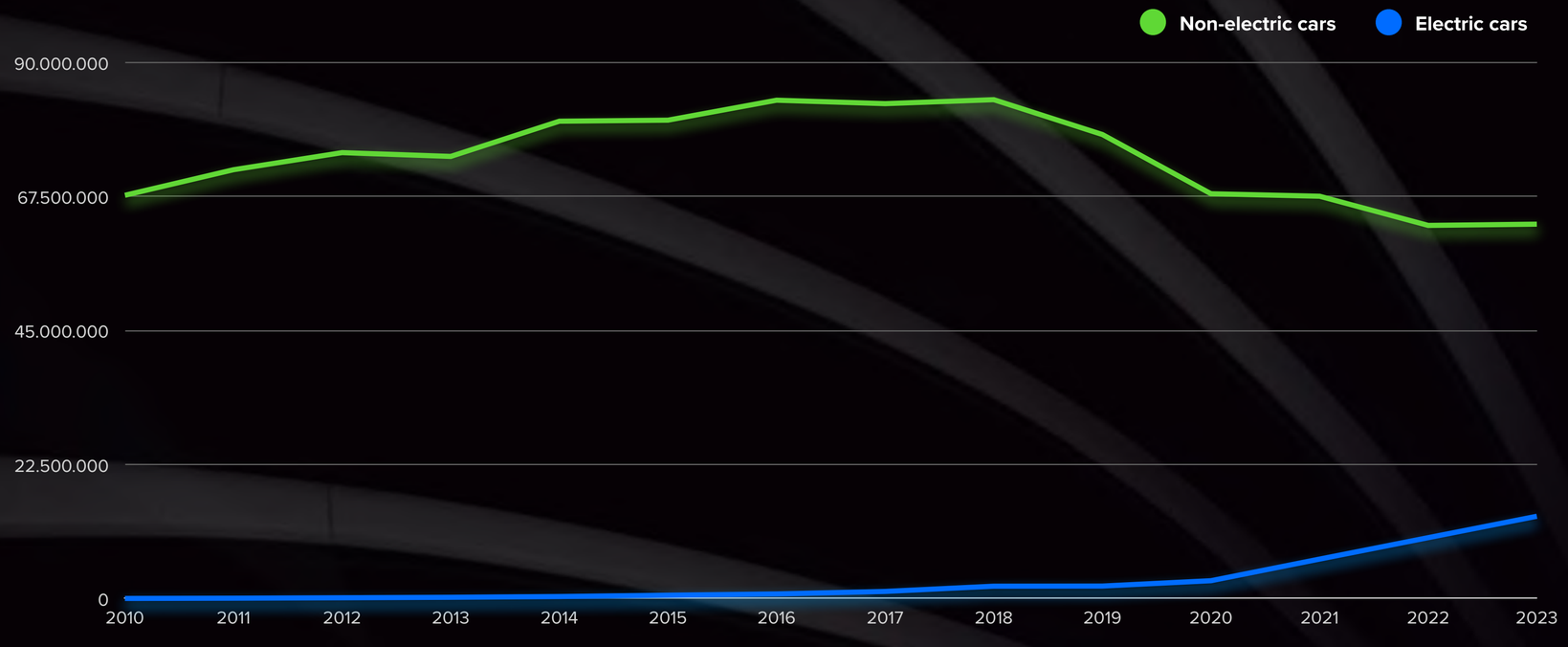
Relative Popularity of the Automotive Industry in Google Search (worldwide)



Source: Google Trends (2024)

Until 2017, non-electric light vehicle sales were steadily increasing. However, in the last 6 years the industry faces a plummet in sales numbers. In 2023 the industry recovered in non-electric light vehicle sales based on IEA reports.
In contrast, electric and hybrid vehicle sales have been steadily increasing over the last 8 years and are expected to grow due to new incentives and regulations.

Yearly Sales of New Cars by Type (worldwide)

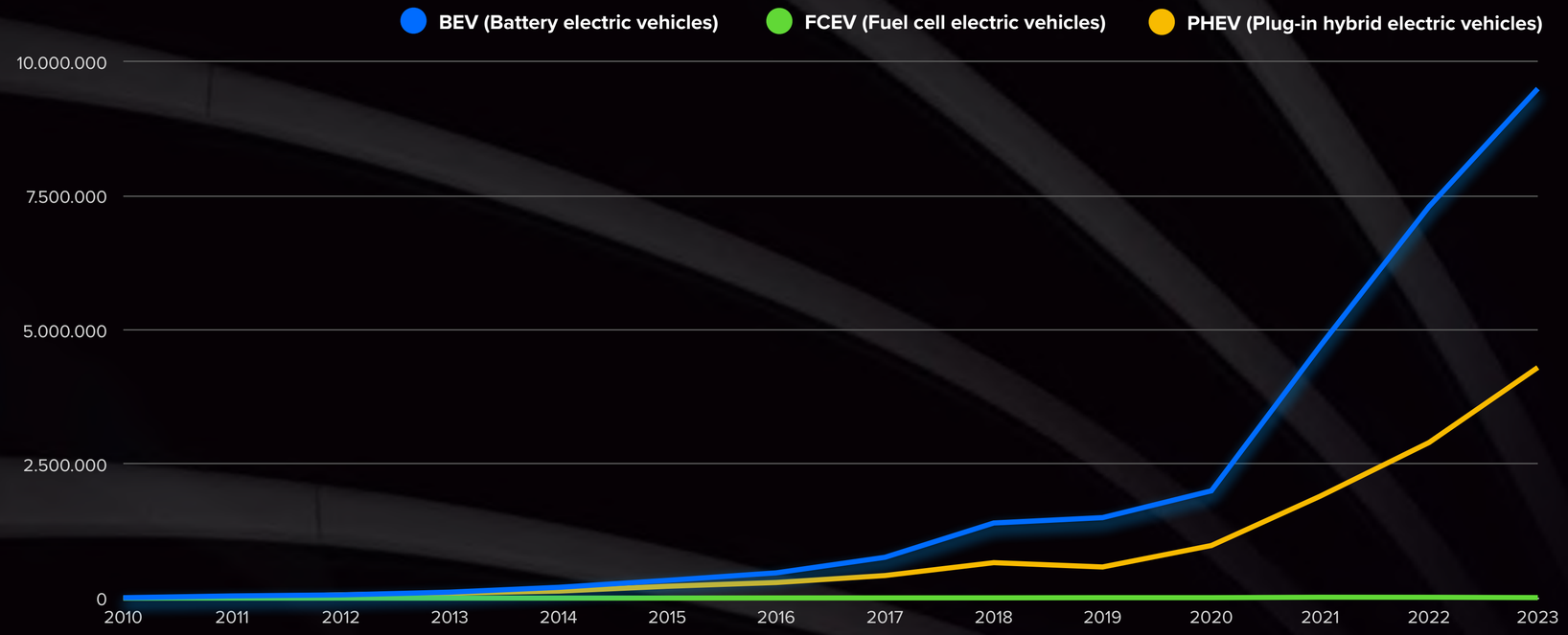


Source: Calculated by Our World in Data based on the International Energy Agency (2024)

Battery electric and plug-in hybrid electric vehicle sales are steadily increasing, according to IEA. BEV sales grew by 30% in compared to last year with a 48% increase in PHEV sales as well.

FCEV sales decreased by 40% compared to last year primarily due to underdeveloped hydrogen infrastructure, high costs and high competition from BEVs.

Yearly Sales of Electric Cars (Units) (worldwide)

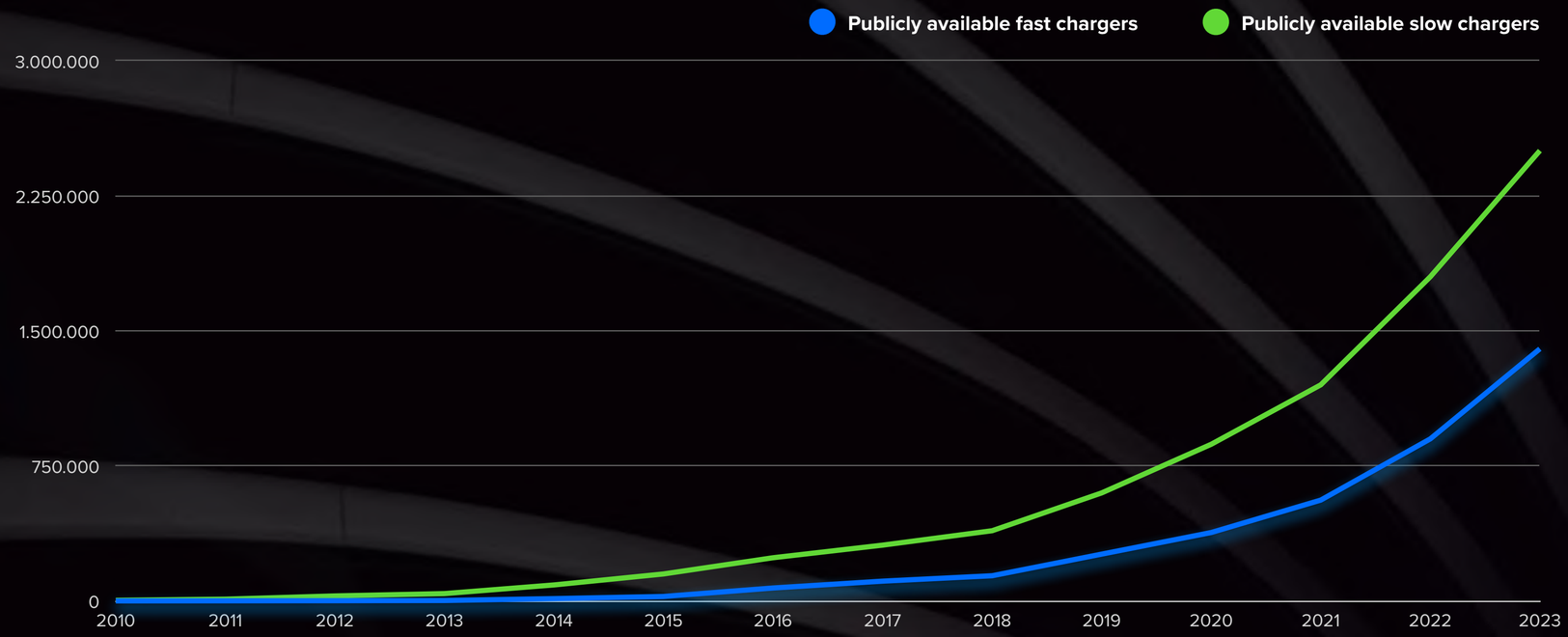


Source: International Energy Agency (2024)

BEVs are battery electric vehicles. PHEVs are plug-in hybrid electric vehicles. FCEVs are fuel cell electric vehicles. EVs refers to all electric vehicles (BEVs + PHEVs).

Based on IEA database, we can see a significant and consistent increase in the number of publicly available fast and slow electric vehicle charging stations from 2010 to 2023, highlighting the rapid expansion and development of EV charging infrastructure globally, with particularly dramatic growth in recent years.

Changes in the Number of Electric Charging Stations (worldwide)



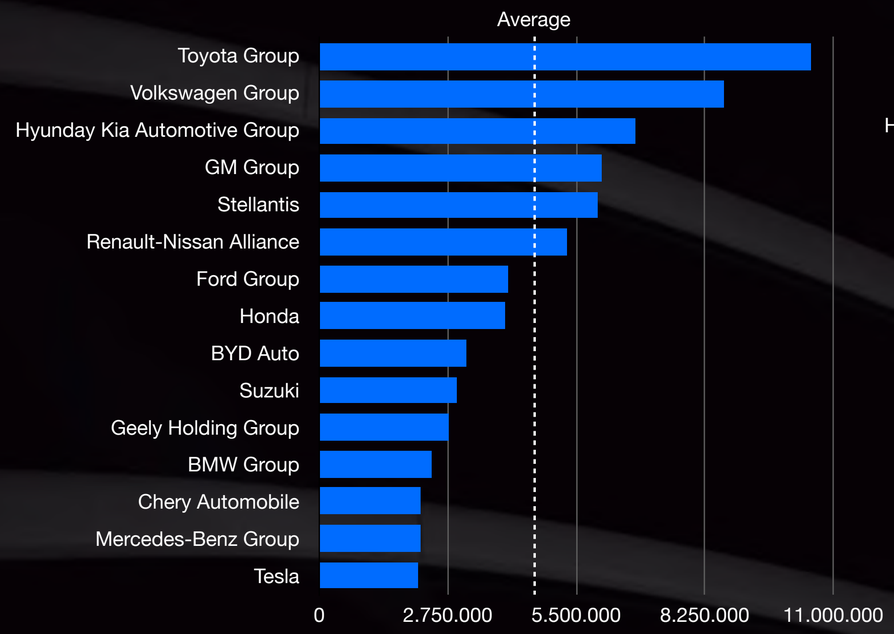
Source: International Energy Agency (2024)

Toyota Group leads in the number of automotive sales with over 10 million units sold in 2023 followed by Volkswagen group and the Hyundai Kia Automotive Group.

Chinese automakers like BYD Auto, Chery Automobile and Geely Holding Group had the biggest sale growth compared to the previous year signaling the growing popularity of Chinese cars in new, western markets.

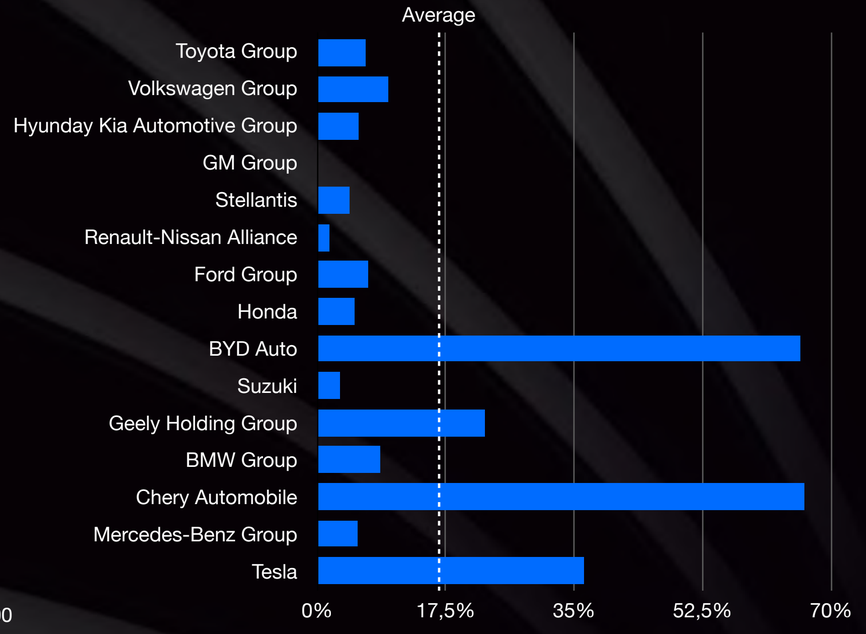
The all electric automaker Tesla also had a big sales growth compared to last year thanks to their popular sedan model, the Model 3.

Top 15 OEMs* based on units sold in 2023 (worldwide)



Source: Markline (2024)

Year-on-year (%) by OEM, 2022-2023 (worldwide)



Source: Marklines (2024)

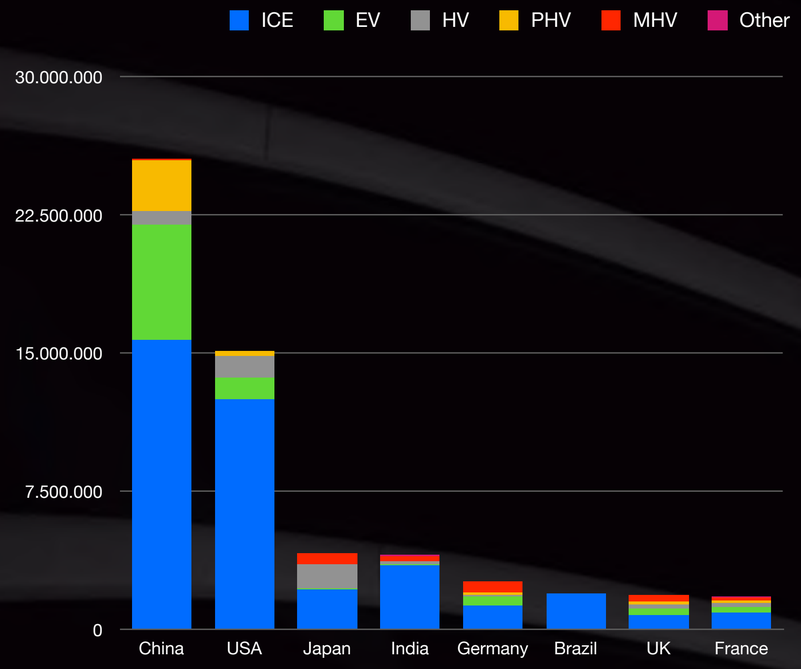
*OEMs, or Original Equipment Manufacturers, are companies that produce parts and equipment that may be marketed by another manufacturer.

China leads in both ICE (Internal Combustion Engine) and EV (Electric Vehicle) vehicle numbers, the USA shows high counts in ICE, EV, and HV (Hybrid Vehicle) vehicles, Japan has significant HV numbers. Other countries like Germany, India, and the UK have varied distributions with notable EV and PHV (Plug-in Hybrid Vehicle) adoption.

In 2023, the global sales share by powertrain shows that ICE vehicles still dominate the market at 68.6%, despite the rising popularity for EVs at 13.3%. Hybrid and hybrid variation vehicles make up 18% of the automotive market.

Automotive sales by powertrain in the top 8 countries in 2023

(by sales volume)



Source: Markline (2024)

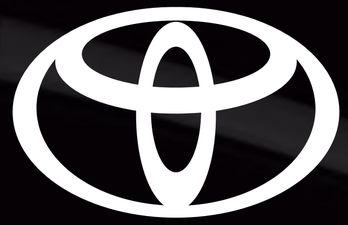
Sales share by powertrain in 2023

(worldwide)

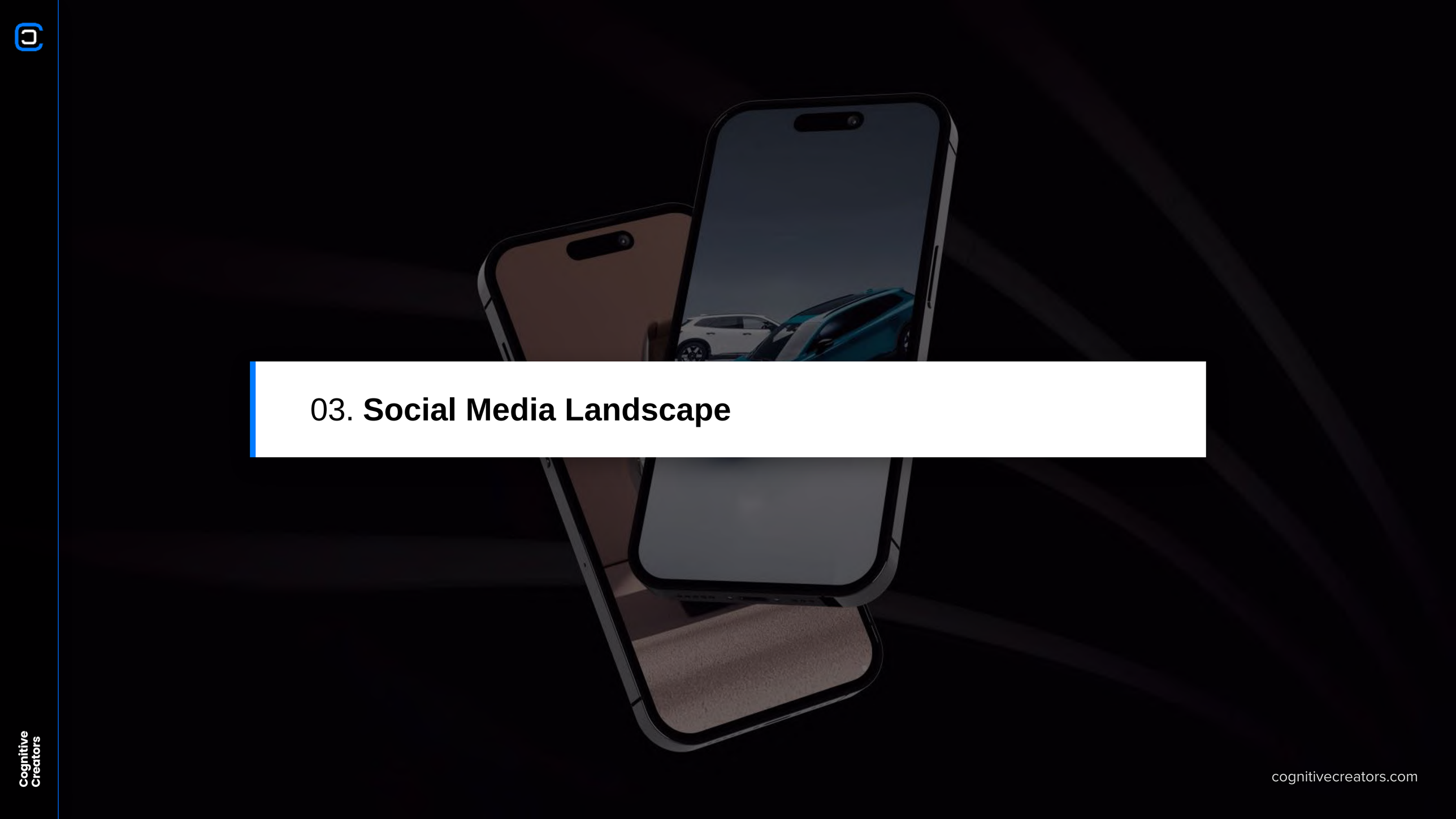
Source: Markline (2024)

ICE (Internal Combustion Engine), EV (Electric Vehicle), HV (Hybrid Vehicle), PHV (Plug-in Hybrid Vehicle), MHV (Mild Hybrid Vehicle), The Other category could include various alternative powertrains not covered by the above categories, such as fuel cell vehicles (FCV) using hydrogen, or other experimental or niche propulsion systems

From 2017 to 2023, non-electric light vehicle sales initially plummeted but recovered in 2023, while electric and hybrid vehicle sales have been steadily increasing, bolstered by new incentives and regulations.



The global automotive market in 2023 was led by Toyota, with China dominating both ICE and EV sectors, and EV adoption continues to rise, supported by the expanding charging infrastructure.



03. **Social Media Landscape**

AGGREGATED FOLLOWER BASE

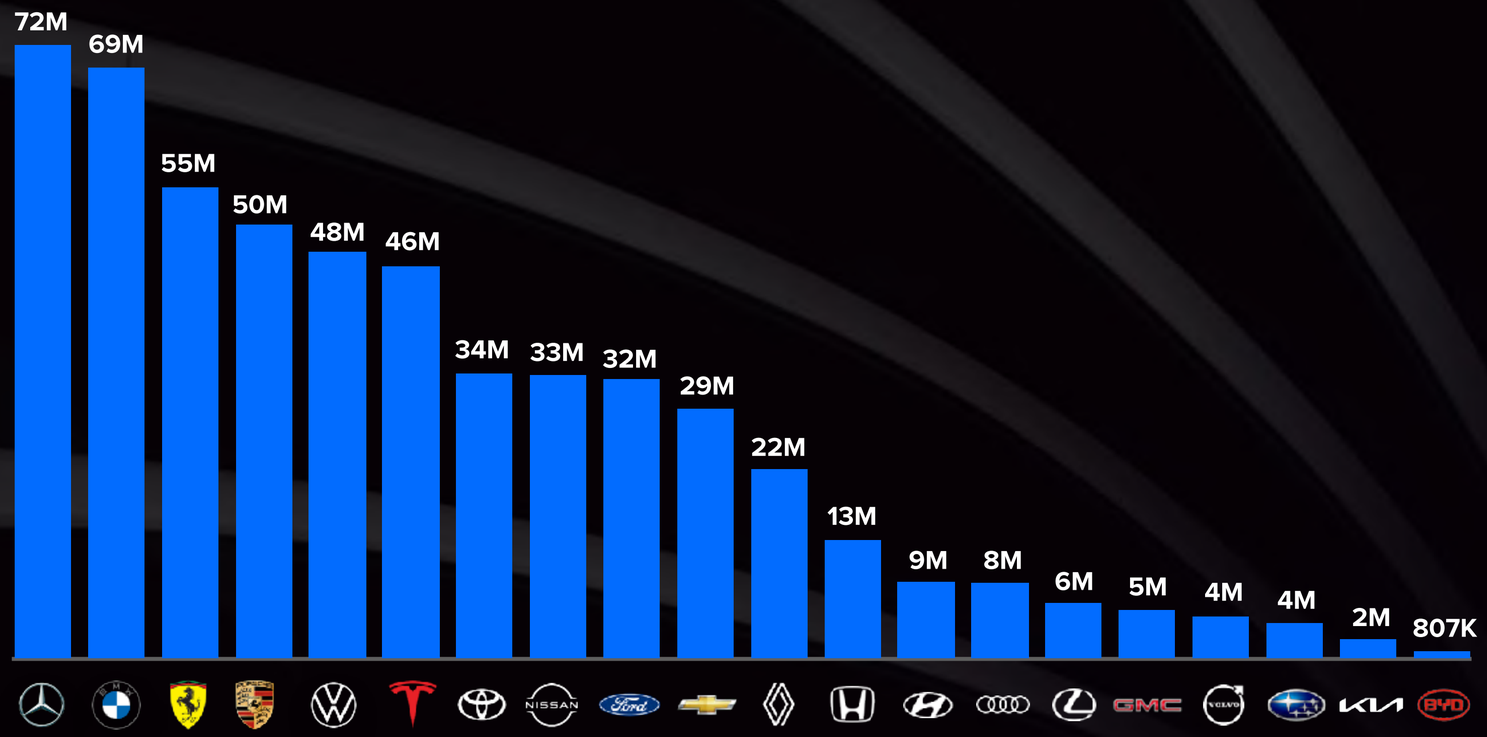
The top two automotive brands with the largest social media following are Mercedes-Benz and BMW. Four out of the top five automotive brands with the most social following originate from Germany.

Four of the top 10 brands with the largest follower base are luxury car manufacturers.

A further breakdown shows that 9 brands have over 30 million followers, and 6 of them have 40+ million followers. These brands, led by Mercedes-Benz (with over 3M more followers than its rival BMW, 3 million less than last year), have established the strongest global strategy integrated with their social media channels.

* Aggregated follower base is the total number of followers on the analysed social media channels (Facebook, Instagram, YouTube, TikTok, Twitter and LinkedIn). The analysis focuses on the EU, USA, Oceania, Japan, and South Korea, providing a comprehensive view of the digital performance of the selected automotive brands within these regions and countries.

Aggregated Social Media Followers by Brand*



FOLLOWER BASE

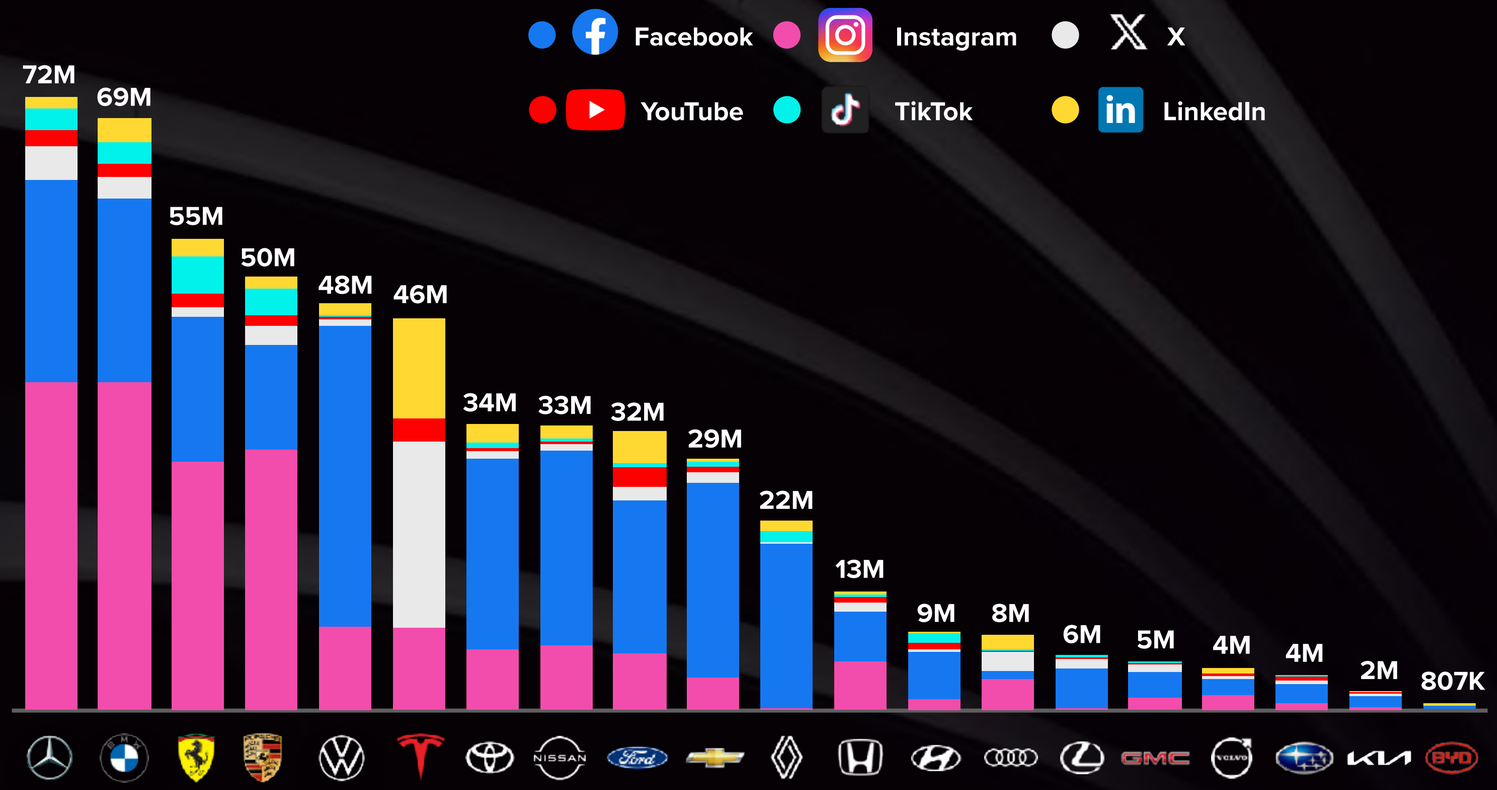
Mercedes-Benz is currently the most successful automotive brand on social media, with the largest number of followers. BMW comes in second place, with a gap of 3 million followers.

Instagram and Facebook still form a crucial part of the social media portfolio for automotive brands.

On TikTok, Ferrari, Mercedes-Benz, and Porsche have the most followers.

On X, Tesla is still the leading brand with over 19M followers, dominating the automotive social media space on this channel, where the total follower base for the industry is 40M.

Aggregated Social Media Followers by Brand and Platform



FOLLOWER BASE

Facebook and Instagram proved to be the most explored social media channels. The two biggest platforms has nearly 80% of the total follower base.

Facebook remains the largest platform for automotive brands, offering a wide audience range.

Instagram's strong presence emphasizes visual storytelling, ideal for showcasing vehicles, designs, and lifestyle content.

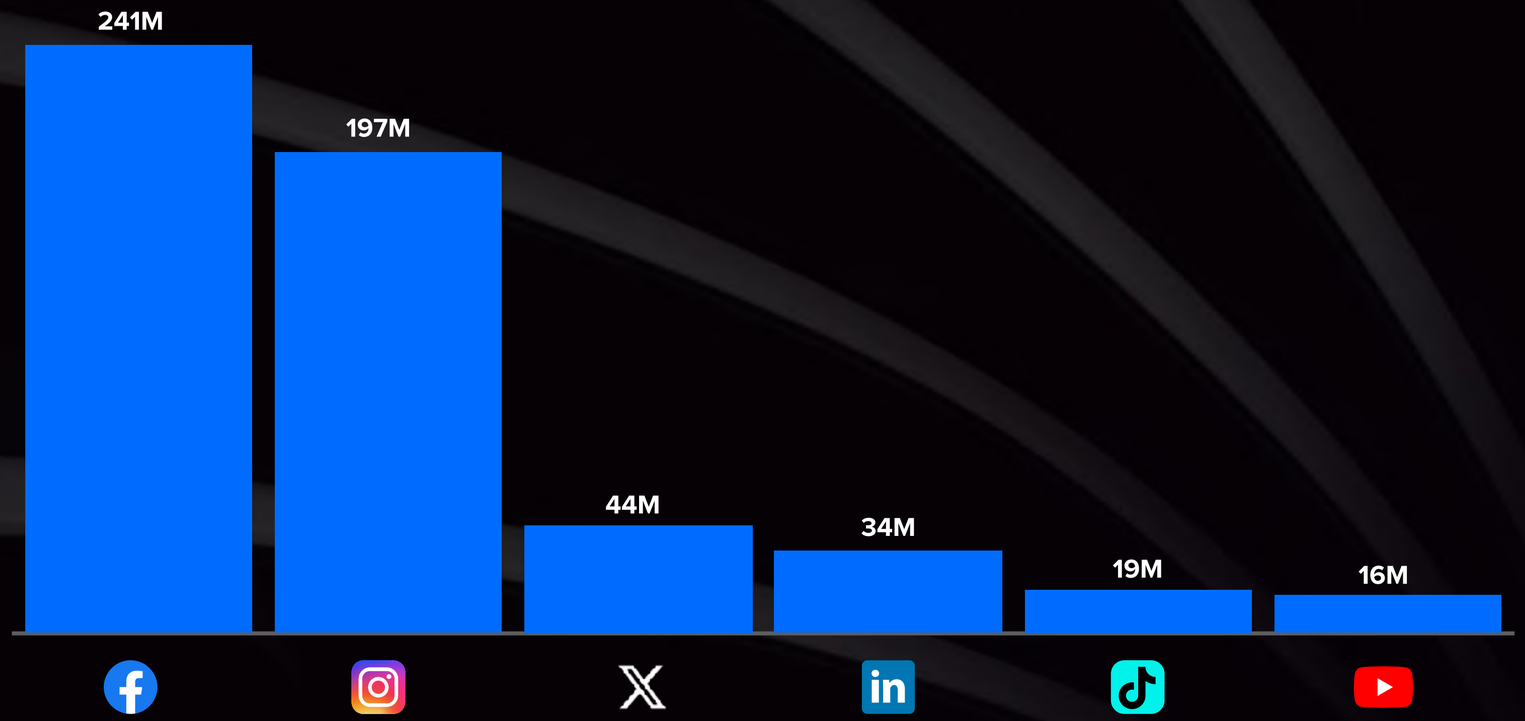
While smaller compared to Facebook and Instagram, Twitter remains a key platform for real-time engagement, customer service, and quick updates.

LinkedIn plays a critical role in B2B marketing, recruiting, and thought leadership for automotive brands.

TikTok’s rapid growth as a platform highlights its importance for brands targeting Gen Z and Millennials.

YouTube is key for long-form content such as car reviews, behind-the-scenes looks, tutorials, and brand stories.

Aggregated Social Media Followers by Channel



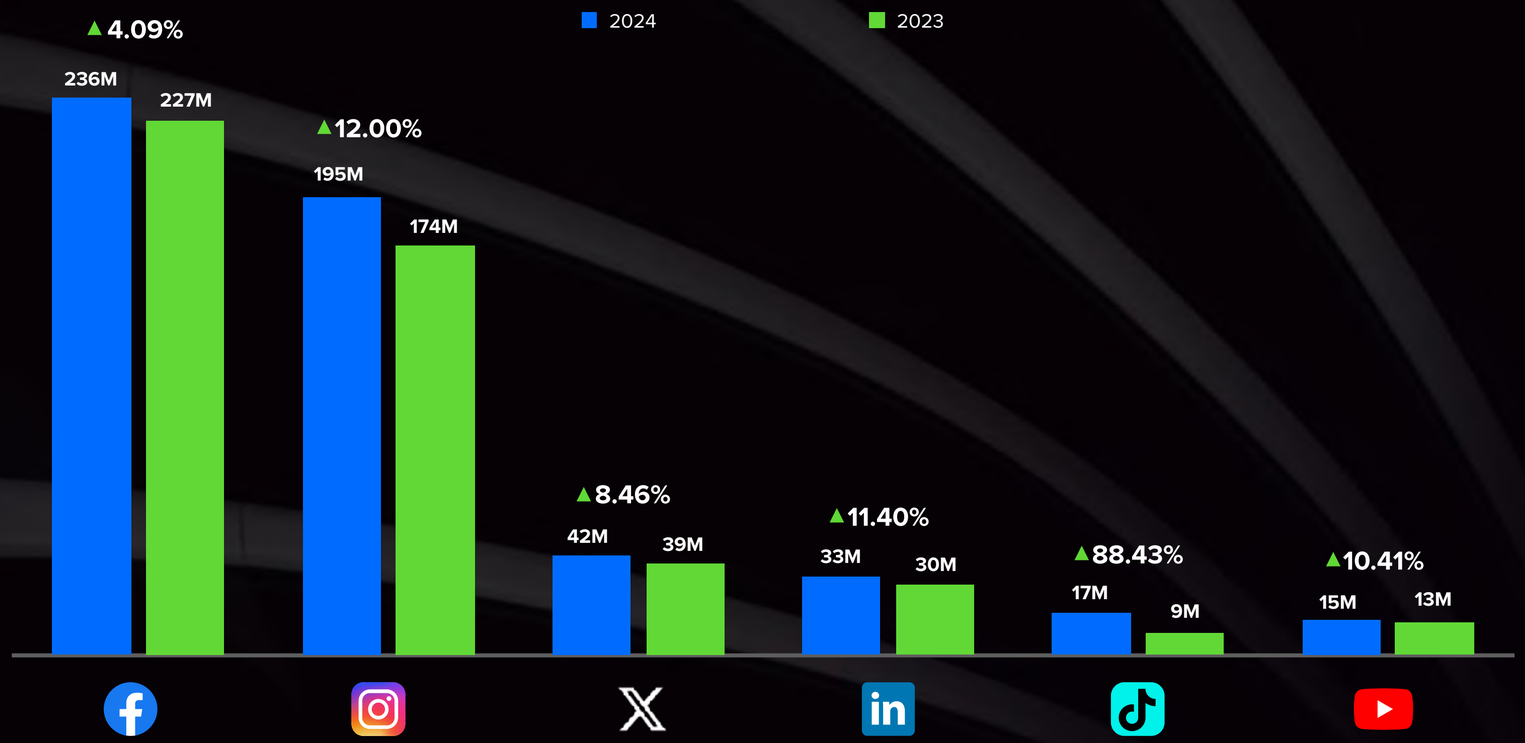
FOLLOWER BASE

Compared to last year, social media followers on different channels have grown on average by 9.46%. The biggest change in number was seen on Instagram, with 20 million new user, but the biggest leap occurred to TikTok with an 88.43% increase compared to previous year.

This comparative analysis highlights brands that ranked in the top 20 of Brand Finance's Automotive Industry Report for both 2022 and 2024.

The comparative chart includes only the brands that were analyzed in both the 2023 and 2024 assessments.

Aggregated Social Media Followers by Channel (year on year comparison)*



*The brands that were present in both year's analysis are: Mercedes-Benz, BMW, Ferrari, Volkswagen, Porsche, Tesla, Nissan, Ford, Toyota, Chevrolet, Renault, Honda, Audi, Hyundai, Lexus, Volvo, Subaru and BYD.

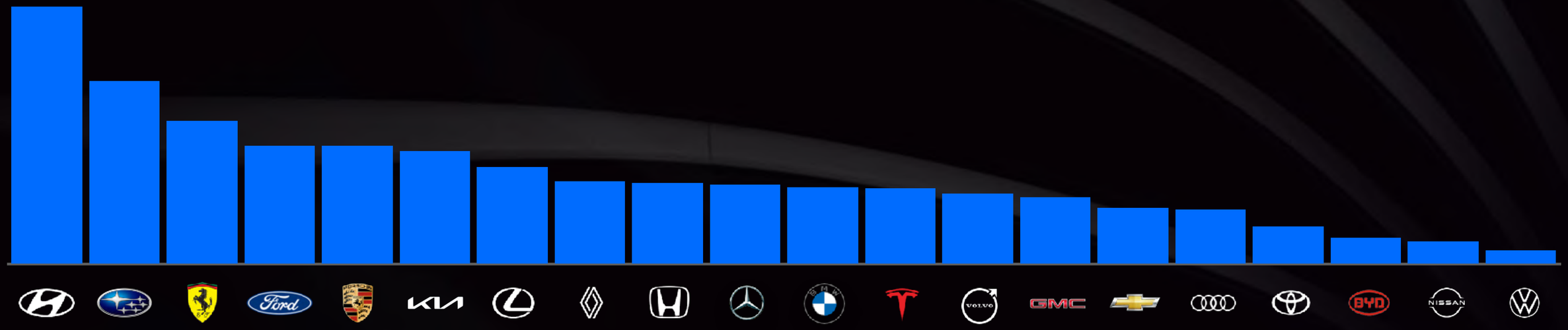
While all the listed brands employ video platforms, Hyundai stands out for relying on them the most. YouTube and TikTok together account for 19% of Hyundai's total follower base, a higher percentage compared to other brands.

Even though more than 19% of Hyundai’s followers are to be found on video platforms, Ferrari has the most followers combined on the two platforms and has the most followers on TikTok. However, Ferrari ranks only fifth in terms of YouTube followers, behind Tesla, Ford, Mercedes-Benz, and BMW.

BYD has nearly doubled his video platform followers compared to last year, suggesting that they may focus on video content more.

Video platform strength has grown by 42% on average compared to last year suggesting that brands rely more on video platforms that before (automotive brands are putting more focus especially on TikTok).

Percentage of YouTube and TikTok Followers Relative to Total Follower Base



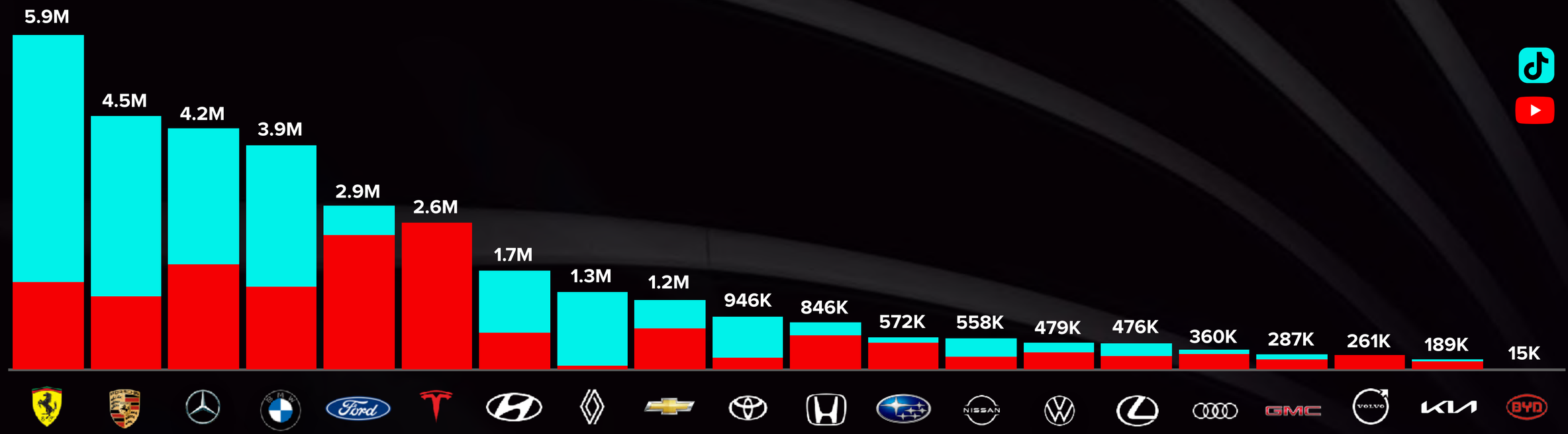
With 2.6 million subscribers, Tesla has the biggest follower base on YouTube, closely followed by Ford with 2.3 million subscribers and Mercedes-Benz with 1.8 million subscribers.

Regarding TikTok, Ferrari has the biggest follower base on the platform with 4.4 million followers, followed Porsche with 3.2 and BMW with 2.5 million followers each.

BYD has grown it's video platform strength 6 times since last year to 15K subscribers. Renault has grown its subscriber base nearly 4 times and gained over one million subscribers.

TikTok and YouTube have gained 10 million new users since last year (counting only the brands that have been present in both analysis).

Aggregated Follower Base on YouTube and TikTok



Hyundai has the highest number of video views per video.

Although Hyundai has the highest number of video views per video on Youtube, it as one of the lowest engagement rate compared to their competitor suggesting that the brand uses their videos for paid advertising.

Ferrari has the highest engagement rate on the platform, followed by Tesla, Porsche and Mercedes-Benz. This indicates that luxury brands can more easily find and engage with their audience.

Hyundai, Kia, GMC, Nissan, and Toyota have the lowest engagement rates, suggesting that the brand's content does not resonate as well with its target audience as the other brands do.

Average YouTube Views per Video and Engagement Rates

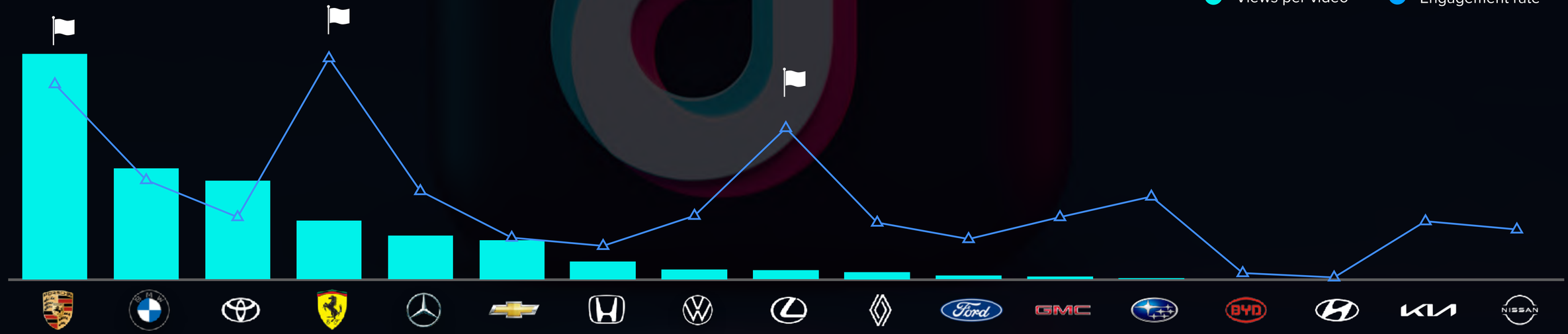
Ferrari, Porsche and Lexus have the highest engagement rates on TikTok.

Luxury brands like Porsche and BMW have the most engaging content on the platform followed by Toyota and Ferrari.

Porsche has by far the highest average views per video (641K) and has the highest engagement rate, indicating a highly effective social media strategy characterized by high-quality, engaging content, deep audience understanding, optimal posting, and active engagement.

Luxury brands like Ferrari, Porsche and Lexus have the most engaging content on the platform followed by BMW and Ford.

Average Views and Engagement Rates per TikTok Video



Tesla does not maintain an official global TikTok account, while Audi and Volvo had not published any videos at the time of the research.

CHANNEL OVERVIEW

	FOLLOWERS	NR. LIKES	AVG INTERACTIONS PER POST	ENGAGEMENT RATE	FOLLOWERS	NR OF POSTS	AVG LIKES PER POST	ENGAGEMENT RATE	FOLLOWERS	AVG ENGAGEMENT PER POST	ENGAGEMENT RATE	SUBSCRIBERS	VIDEO VIEWS	AVG. ENGAGEMEN PER VIDEO	AVG. VIEWS PER VIDEO	ENGAGEMENT RATE	FOLLOWERS	NR. LIKES	Avg Engagement per post	ENGAGEMENT RATE	FOLLOWERS	TOTAL LIKES (LAST 30 DAYS)	AVG LIKES PER POST	ENGAGEMENT RATE
Audi	1,049,852	999,859	903	0.09%	3,609,119	3,221	17,455	0.58%	2,073,560	0	0,00%	281,000	74,087,929	520	220,500	0.24%	79,000	0	0	0,00%	1,781,949	49,451	951	0.05%
BMW	21,548,976	20,522,834	5,552	0.03%	38,496,350	11,311	75,929	0.20%	2,590,151	1,338	1.17%	1,480,000	244,772,588	546	286,284	0.19%	2,500,000	16,800,000	20,462	0.82%	2,830,376	43,538	308	0.03%
BYD	360,644	343,470	2,729	0.76%	119,186	994	534	0.46%	64,356	192	1.17%	6,920	3,069,118	44	22,402	0.20%	8,557	14,500	44	0.52%	248,220	11,403	456	0.18%
Chevrolet	22,985,501	21,890,953	0	0.00%	3,734,795	1,937	3,486	0.10%	1,149,989	0	0,00%	735,000	16,816,466	192	45,947	0.42%	512,600	2,300,000	374	0.07%	333,694	113	113	0.03%
Ferrari	16,917,423	16,111,831	5,246	0.03%	29,212,180	4,569	125,197	0.43%	1,219,413	59	0.04%	1,550,000	186,833,189	2,098	67,182	3.12%	4,400,000	79,300,000	147,563	3.35%	1,990,378	198,060	6,189	0.31%
Ford	18,016,196	17,158,282	953	0.01%	6,661,000	555	8,244	0.13%	1,492,957	527	1.96%	2,390,000	85,752,243	156	131,120	0.12%	524,300	1,800,000	14,105	2.69%	3,782,483	16,398	390	0.01%
GMC	2,931,412	2,791,821	1,180	0.04%	1,469,157	1,690	8,479	0.58%	1,033,178	0	0,00%	181,000	108,416,058	19	312,438	0.01%	106,300	1,100,000	150	0.14%	35,540	0	0	0,00%
Honda	5,772,444	5,497,566	1,158	0.02%	5,692,506	2,618	9,360	0.17%	1,184,059	0	0,00%	611,000	191,794,540	128	121,006	0.11%	235,200	676,700	291	0.12%	404,768	3,693	308	0.08%
Hyundai	5,420,439	5,162,323	1,123	0.02%	1,344,548	2,940	3,321	0.25%	424,636	24	1.18%	659,000	1,879,747,307	56	1,910,312	0.00%	1,100,000	18,700,000	6,955	0.63%	139,255	12,099	257	0.18%
Kia	1,234,804	1,176,004	417	0.03%	332,497	1,331	1,671	0.52%	362,270	152	1.17%	151,000	140,540,118	102	1,064,698	0.01%	38,400	313,200	113	0.29%	116,426	3,350	209	0.18%
Lexus	4,693,492	4,469,992	2,256	0.05%	229,089	573	2,520	1.11%	1,046,003	0	0,00%	255,000	28,812,396	91	39,415	0.23%	221,000	1,200,000	4,810	2.18%	115,494	3,157	526	0.46%
Mercedes Benz	23,830,592	22,695,802	496	<0.01%	38,385,667	20,277	66,225	0.17%	4,022,660	706	1.20%	1,880,000	304,909,144	795	139,355	0.57%	2,400,000	11,700,000	38,478	1.60%	1,573,964	100,000	2,083	0.13%
Nissan	22,966,464	21,872,823	217	<0.01%	7,512,047	5,968	22,209	0.30%	791,920	222	2.58%	229,000	109,119,615	48	126,883	0.04%	329,100	3,800,000	643	0.20%	1,522,328	19,884	485	0.03%
Porsche	12,219,092	11,637,230	5,440	0.04%	30,591,341	3,772	346,999	1.14%	2,222,967	1,958	1.13%	1,310,000	518,677,921	1,821	192,459	0.95%	3,200,000	32,100,000	53,795	1.68%	1,363,910	206,139	1,963	0.14%
Renault	19,341,982	18,420,935	110	<0.01%	175,204	220	1,555	0.89%	136,419	27	1.17%	80,500	40,026,150	43	23,421	0.18%	1,300,000	6,700,000	6,436	0.50%	1,269,329	2,736	114	0.01%
Subaru	2,182,438	2,078,512	573	0.03%	836,385	4,481	2,524	0.31%	487,366	0	0,00%	487,000	250,341,516	244	245,192	0.10%	85,900	481,500	360	0.42%	98,544	1,536	219	0.22%
Tesla	Not present	Not present	Not present	Not present	9,702,370	817	47,039	0.49%	21,820,340	8,981	1.15%	2,620,000	290,348,534	15,757	827,204	1.90%	0	0	0	0,00%	11,940,111	3,801	1,267	0.01%
Toyota	22,354,991	21,290,468	2,643	0.01%	7,180,956	2,719	23,772	0.33%	944,395	0	0,00%	212,000	7,672,557	10	24,204	0.04%	734,000	2,000,000	2,081	0.28%	2,079,145	4,025	4,025	0.19%
Volkswagen	35,262,228	33,583,074	68	<0.01%	9,840,273	3,747	6,724	0.07%	720,228	0	0,00%	312,000	89,162,043	124	130,164	0.10%	167,400	478,100	780	0.47%	1,455,624	12,144	258	0.02%
Volvo	1,973,019	1,879,066	1,935	0.10%	1,735,426	458	8,583	0.50%	259,978	0	0,00%	258,000	102,720,568	200	219,020	0.09%	3,400	0	0	0,00%	717,558	13,479	963	0.13%

Brands with the best performance based on the listed KPIs

Data values that have the highest score in the listed KPIs

Data values that are close to the highest score in the listed KPIs

YEARLY POSITION CHANGES

Mercedes-Benz has maintained the largest follower base, adding nearly 4 million followers across all platforms since last year's analysis. BMW remains in second place, gaining over 7 million followers and gradually narrowing the gap with Mercedes-Benz.

Ferrari saw the highest follower increase, with 8.7 million new followers across social media.

BYD experienced the fastest growth rate, nearly doubling its follower base compared to last year.

The comparative table includes only the brands that were analyzed in both the 2023 and 2024 assessments.

POSITION	2023	2024	POSITION CHANGE	YEAR ON YEAR CHANGE IN FOLLOWER BASE	YEAR ON YEAR CHANGE IN FOLLOWER BASE
1	Mercedes-Benz	Mercedes-Benz	0	+3.990.411	+5.86%
2	BMW	BMW	0	+7.345.181	+11.83%
3	Ferrari	Ferrari	0	+8.471.327	+18.09%
4	Volkswagen	Porsche	+1	+5.951.154	+13.24%
5	Porsche	Volkswagen	-1	+1.682.084	+3.65%
6	Tesla	Tesla	0	+4.101.465	+9.77%
7	Nissan	Toyota	+2	+2.882.885	+9.41%
8	Ford	Nissan	-1	+2.200.607	+7.06%
9	Toyota	Ford	-1	+1.980.350	+6.41%
10	Chevrolet	Chevrolet	0	+1.420.910	+5.07%
11	Renault	Renault	0	+1.863.520	+9.12%
12	Honda	Honda	0	+1.344.343	+10.71%
13	Audi	Hyundai	+1	+1.178.919	+14.91%
14	Hyundai	Audi	-1	+894.535	+11.21%
15	Lexus	Lexus	0	+438.074	+7.16%
16	Volvo	Volvo	0	+396.263	+8.71%
17	Subaru	Subaru	0	+249.097	+6.34%
18	BYD	BYD	0	+391.073	+93.83%

CHANGE IN FOLLOWER BASE

Seven brands have seen follower losses on at least one social media platform since last year, with Audi experiencing the most significant decline on Facebook and X.

However, Audi and Nissan launched their TikTok accounts since the previous analysis.

BYD's follower base showed the largest growth across all platforms, highlighting the success of their social media strategy, though they remain one of the least followed brands overall.

The comparative table includes only the brands that were analyzed in both the 2023 and 2024 assessments.

	FOLLOWER BASE	FOLLOWER BASE	FOLLOWER BASE	FOLLOWER BASE	FOLLOWER BASE	FOLLOWER BASE
Audi	-3.51%	+20.56%	-2.09%	+14.58%	∞	+24.61%
BMW	+4.13%	+12.97%	+4.11%	+17.37%	+127.27%	+11.28%
BYD	+83.39%	+133.20%	+78.83%	+89.64%	+2250.82%	+282.32%
Chevrolet	+3.85%	+10.73%	-0.53%	+15.63%	+39.60%	+3.01%
Ferrari	+4.16%	+20.25%	+15.92%	+16.32%	+91.30%	+27.05%
Ford	+4.20%	+15.72%	+1.91%	-0.11%	+50.57%	+6.70%
Honda	+4.55%	+16.83%	+1.68%	+21.05%	+112.27%	+10.59%
Hyundai	+20.35%	+8.87%	+30.31%	+30.19%	0.00%	+3.39%
Lexus	+4.49%	+107.10%	+0.20%	+23.67%	+43.51%	+11.65%
Mercedes Benz	+3.71%	+5.32%	+0.52%	+29.69%	+41.18%	+6.82%
Nissan	+4.13%	+12.56%	-1.89%	+11.59%	∞	-8.40%
Porsche	+3.53%	+12.90%	+4.14%	+29.50%	+88.24%	+11.97%
Renault	+3.38%	+7.52%	-0.69%	+10.41%	+532.30%	+6.91%
Subaru	+6.85%	+4.00%	+0.16%	+15.73%	+65.19%	+6.31%
Tesla	0.00%	+1.86%	+14.61%	+7.58%	0.00%	+12.93%
Toyota	+1.27%	+35.92%	+2.00%	+10.51%	+199.47%	+0.28%
Volkswagen	+4.10%	-0.03%	+2.88%	+11.35%	+164.45%	+7.81%
Volvo	+4.38%	+11.39%	+5.94%	+13.54%	+1900.00%	+14.46%

CHANGE IN FOLLOWER BASE

The largest follower base increase was observed in just three of the analyzed brands. Ferrari saw the highest growth on Instagram, TikTok, and YouTube, while Tesla gained the most subscribers on X and LinkedIn. Volkswagen led in follower growth on Facebook. Each of these brands strengthened their presence on their chosen platforms, achieving the most significant growth over the past year.

Six brands have experienced a decline in followers since last year. Audi saw the largest drop, losing over 80K followers, followed by Nissan, which lost around 35K. Additionally, Chevrolet, Ford, Renault, and Volkswagen also saw slight decreases in their follower base.

The comparative table includes only the brands that were analyzed in both the 2023 and 2024 assessments.

	FOLLOWER BASE	FOLLOWER BASE	FOLLOWER BASE	FOLLOWER BASE	FOLLOWER BASE	FOLLOWER BASE
Audi	-38.142	+615.553	-44.185	+226.809	+79.000	+55.500
BMW	+853.905	+4.419.971	+102.344	+418.961	+1.400.000	+150.000
BYD	+163.995	+68.078	+28.369	+117.328	+8.193	+5.110
Chevrolet	+852.960	+362.060	-6.104	+45.094	+145.400	+21.500
Ferrari	+675.912	+4.918.714	+167.479	+279.222	+2.100.000	+330.000
Ford	+725.516	+905.039	+28.026	-4.331	+176.100	+150.000
Honda	+251.429	+820.094	+19.522	+70.398	+124.400	+58.500
Hyundai	+916.667	+109.581	+98.781	+32.290	0	+21.600
Lexus	+201.764	+118.473	+2.131	+22.106	+67.000	+26.600
Mercedes Benz	+851.753	+1.937.727	+20.631	+360.300	+700.000	+120.000
Nissan	+911.155	+838.458	-15.241	+158.135	+329.100	-21.000
Porsche	+416.177	+3.495.842	+88.464	+310.671	+1.500.000	+140.000
Renault	+632.914	+12.251	-948	+119.703	+1.094.400	+5.200
Subaru	+139.978	+32.139	+783	+13.397	+33.900	+28.900
Tesla	0	+177.330	+2.782.350	+841.785	0	+300.000
Toyota	+279.359	+1.897.797	+18.562	+197.667	+488.900	+600
Volkswagen	+1.389.517	-2.650	+20.158	+148.359	+104.100	+22.600
Volvo	+82.861	+177.454	+14.570	+85.548	+3.230	+32.600

CHANGE IN FOLLOWER BASE

Volkswagen continues to hold the top spot on Facebook, while Mercedes-Benz, Nissan, Toyota, and BMW remain closely matched in follower count.

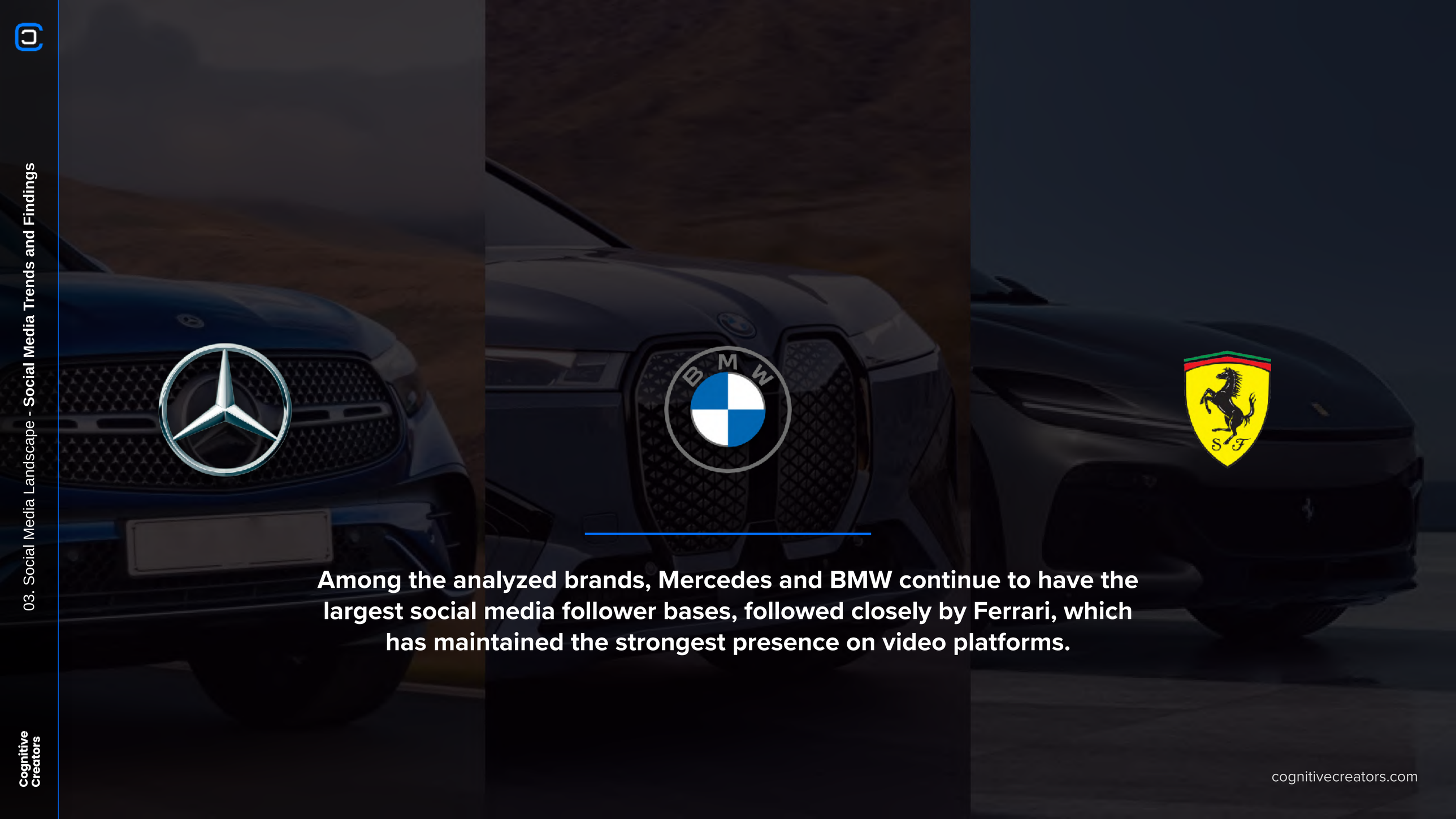
BMW has overtaken Mercedes-Benz to become the most followed brand on Instagram.

Tesla maintains the largest follower base on X, LinkedIn, and YouTube, while Ferrari remains the most followed brand on TikTok.

	FOLLOWER BASE		FOLLOWER BASE		FOLLOWER BASE		FOLLOWER BASE		FOLLOWER BASE		FOLLOWER BASE		ALL	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Audi	1.087.994	1.049.852	2.993.566	3.609.119	2.117.745	2.073.560	1.555.140	1.781.949	0	79.000	225.500	281.000	7.979.945	8.874.480
BMW	20.695.071	21.548.976	34.076.379	38.496.350	2.487.807	2.590.151	2.411.415	2.830.376	1.100.000	2.500.000	1.330.000	1.480.000	62.100.672	69.445.853
BYD	196.649	360.644	51.108	119.186	35.987	64.356	130.892	248.220	364	8.557	1.810	6.920	416.810	807.883
Chevrolet	22.132.541	22.985.501	3.372.735	3.734.795	1.156.093	1.149.989	288.600	333.694	367.200	512.600	713.500	735.000	28.030.669	29.451.579
Ferrari	16.241.511	16.917.423	24.293.466	29.212.180	1.051.934	1.219.413	1.711.156	1.990.378	2.300.000	4.400.000	1.220.000	1.550.000	46.818.067	55.289.394
Ford	17.290.680	18.016.196	5.755.961	6.661.000	1.464.931	1.492.957	3.786.814	3.782.483	348.200	524.300	2.240.000	2.390.000	30.886.586	32.866.936
Honda	5.521.015	5.772.444	4.872.412	5.692.506	1.164.537	1.184.059	334.370	404.768	110.800	235.200	552.500	611.000	12.555.634	13.899.977
Hyundai	4.503.772	5.420.439	1.234.967	1.344.548	325.855	424.636	106.965	139.255	1.100.000	1.100.000	637.400	659.000	7.908.959	9.087.878
Lexus	4.491.728	4.693.492	110.616	229.089	1.043.872	1.046.003	93.388	115.494	154.000	221.000	228.400	255.000	6.122.004	6.560.078
Mercedes Benz	22.978.839	23.830.592	36.447.940	38.385.667	4.002.029	4.022.660	1.213.664	1.573.964	1.700.000	2.400.000	1.760.000	1.880.000	68.102.472	72.092.883
Nissan	22.055.309	22.966.464	6.673.589	7.512.047	807.161	791.920	1.364.193	1.522.328	0	329.100	250.000	229.000	31.150.252	33.350.859
Porsche	11.802.915	12.219.092	27.095.499	30.591.341	2.134.503	2.222.967	1.053.239	1.363.910	1.700.000	3.200.000	1.170.000	1.310.000	44.956.156	50.907.310
Renault	18.709.068	19.341.982	162.953	175.204	137.367	136.419	1.149.626	1.269.329	205.600	1.300.000	75.300	80.500	20.439.914	22.303.434
Subaru	2.042.460	2.182.438	804.246	836.385	486.583	487.366	85.147	98.544	52.000	85.900	458.100	487.000	3.928.536	4.177.633
Tesla	0	0	9.525.040	9.702.370	19.037.990	21.820.340	11.098.326	11.940.111	0	0	2.320.000	2.620.000	41.981.356	46.082.821
Toyota	22.075.632	22.354.991	5.283.159	7.180.956	925.833	944.395	1.881.478	2.079.145	245.100	734.000	211.400	212.000	30.622.602	33.505.487
Volkswagen	33.872.711	35.262.228	9.842.923	9.840.273	700.070	720.228	1.307.265	1.455.624	63.300	167.400	289.400	312.000	46.075.669	47.757.753
Volvo	1.890.158	1.973.019	1.557.972	1.735.426	245.408	259.978	632.010	717.558	170	3.400	225.400	258.000	4.551.118	4.947.381

The comparative table includes only the brands that were analyzed in both the 2023 and 2024 assessments.

The automotive brands analysed each have their favoured social media channel, where they place particular focus. Luxury brands tend to garner more engagement on social media than traditional automakers, especially on video platforms.

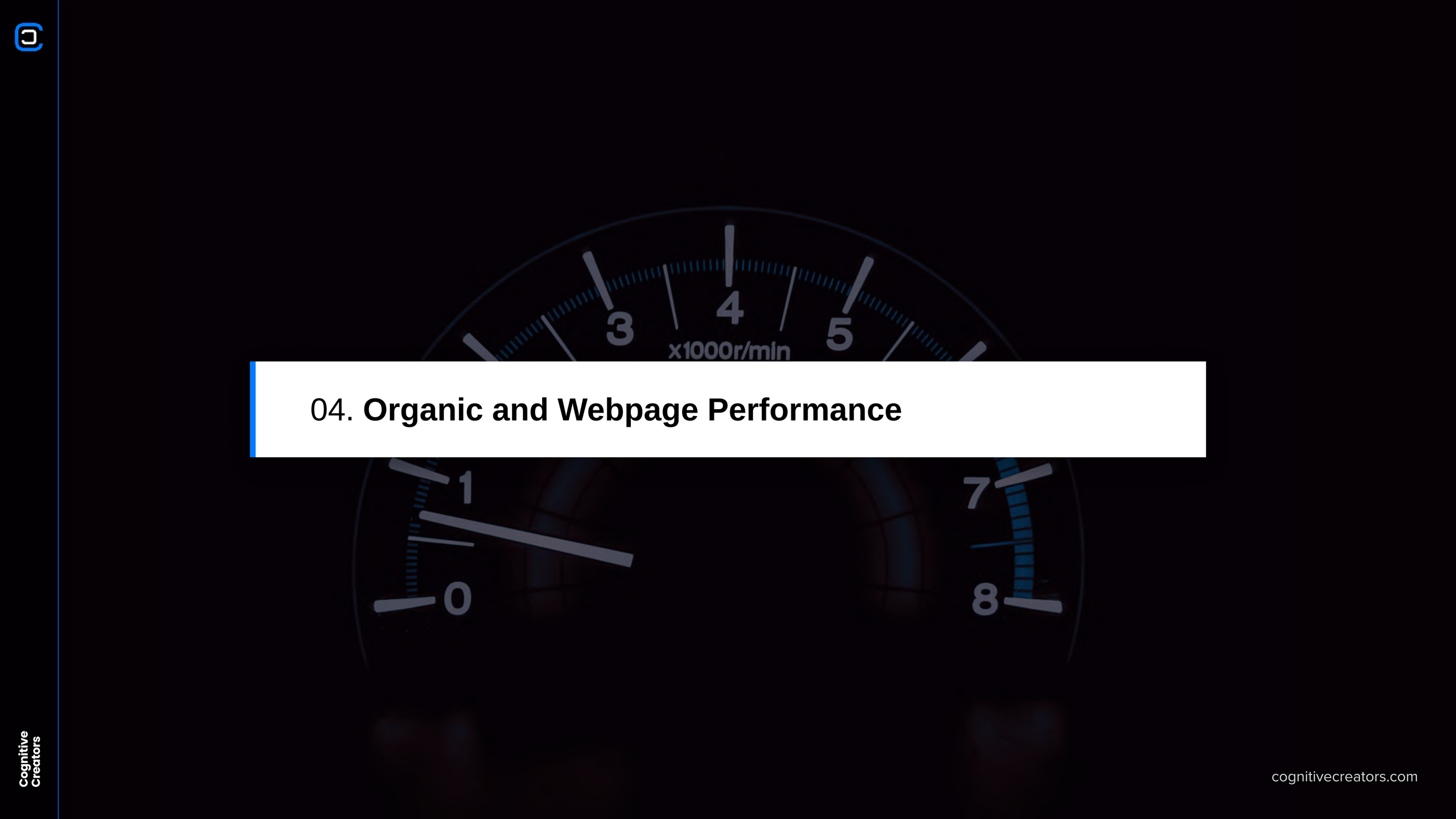


Among the analyzed brands, Mercedes and BMW continue to have the largest social media follower bases, followed closely by Ferrari, which has maintained the strongest presence on video platforms.

On YouTube, Hyundai receives the highest number of video views; however, it does not exceed Ferrari's engagement rate on the platform.

TikTok is becoming increasingly important for car brands, particularly luxury brands, as they discover it to be a platform where they can engage their most responsive audience.

Ferrari has gained the highest number of followers, reaching 8.4 million since the last analysis. BYD has experienced the most significant growth in its follower base compared to last year, with an increase of 93.83%.

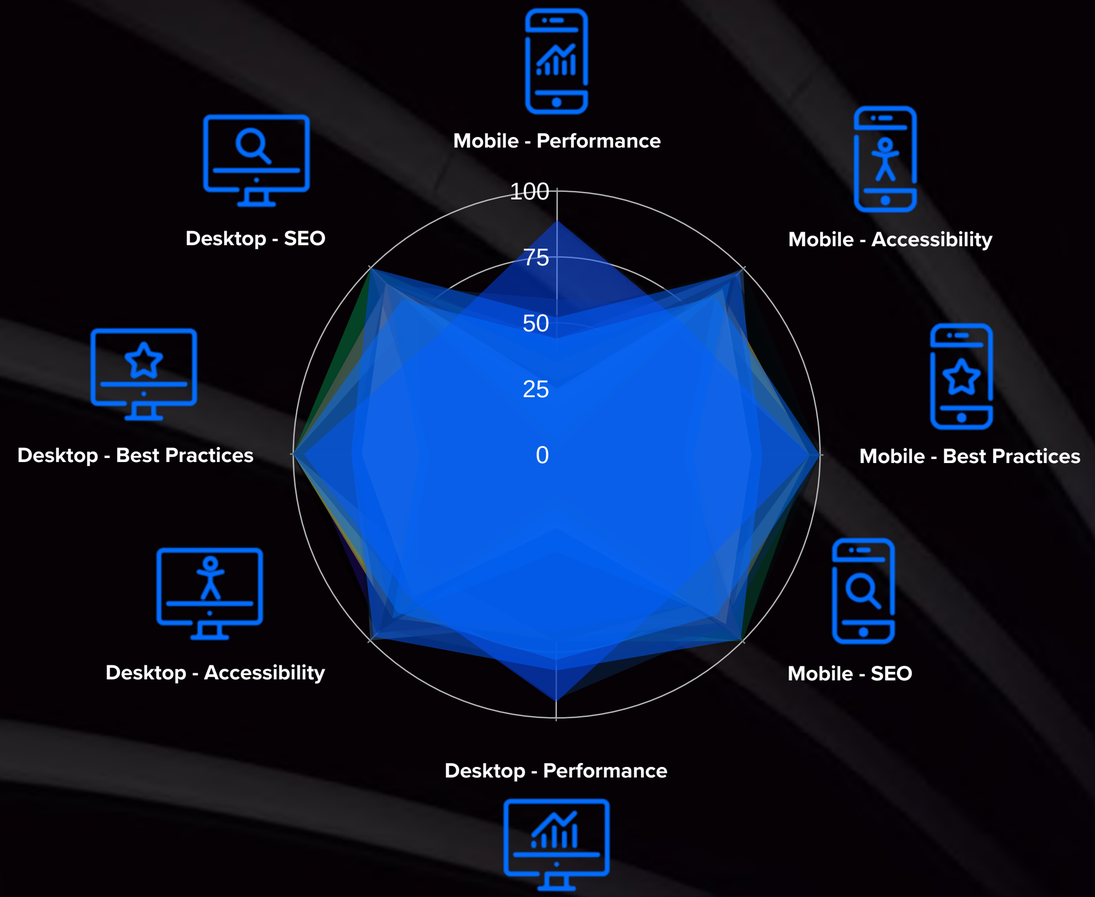


04. **Organic and Webpage Performance**

In 2024, the average mobile performance score for automotive brand webpages is 51 out of 100, reflecting a moderate speed according to PageSpeed Insights.

Mercedes-Benz's website scored the highest on desktop (93) and BYD's on mobile (89).

Out of the 20 automotive brands analyzed, 19 received low mobile performance scores, highlighting significant room for improvement in their websites' mobile performance to enhance user experience and improve search rankings, as Google considers these scores in its search ranking algorithm.



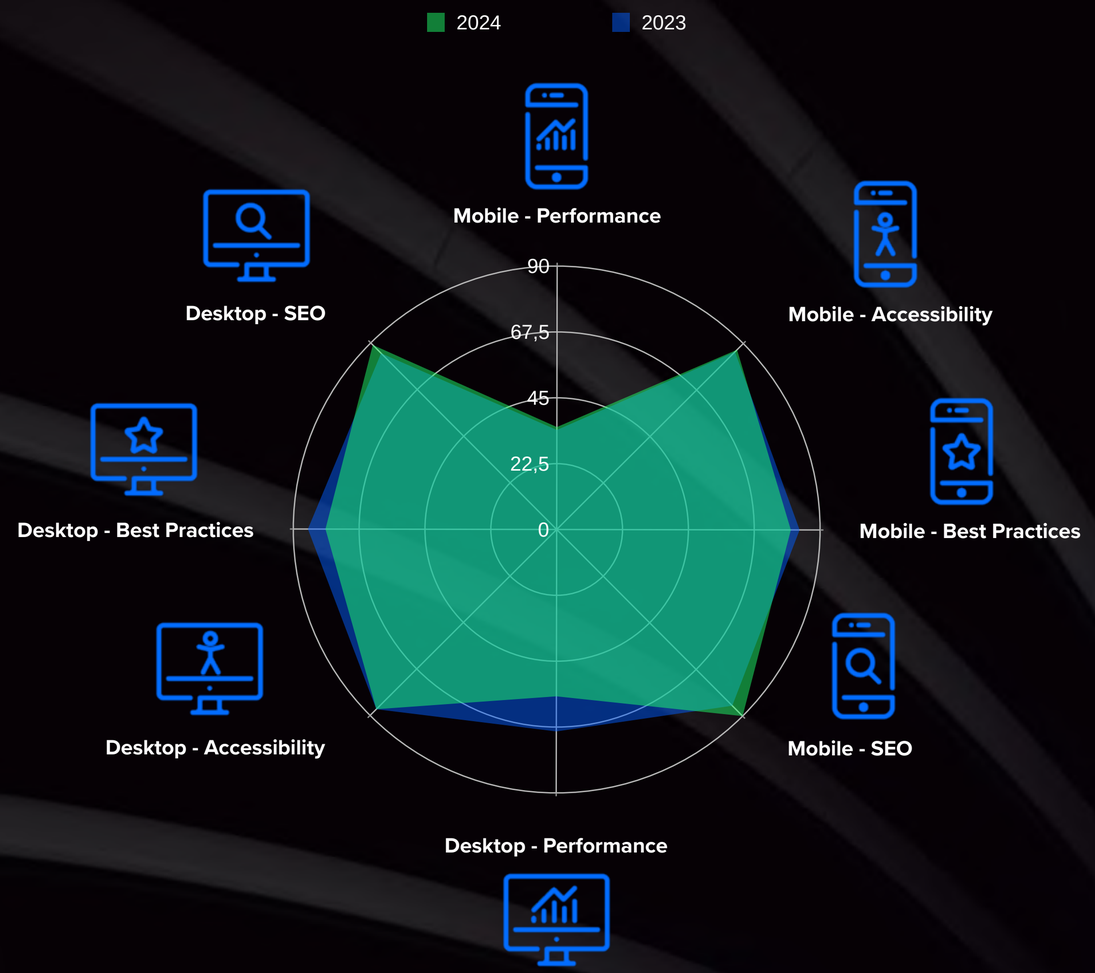
Technical Remarks

Mobile and desktop performance scores are based on best practices for performance optimisation that are known to provide the best user experience. These metrics are used to evaluate the performance of a page on both mobile and desktop devices, and also help in diagnosing user experience issues and improving them. The tool used for these performance evaluations is Google PageSpeed Insights, a tool that runs a series of tests on webpages and generates performance scores and suggestions for improvement.

The desktop average performance score dropped compared to 2023 by 16.18% from 69 to 58 points. On the other hand mobile performance rose up by 5.18% to 35 points from last year's 34 points.

Mobile and desktop SEO scores rose by 4.46% on average compares to last year.

The overall website performance dropped compared to last year by 1.59% with performance dropping by 9.18%, accessibility by 1.04%, best practices by 4.31% but SEO score rising by 4.46%. The changes indicate that while efforts to improve mobile optimisation and SEO have been successful, resulting in a slight increase in mobile performance and a notable rise in SEO scores, the overall website performance has declined, particularly on desktops.



Technical Remarks

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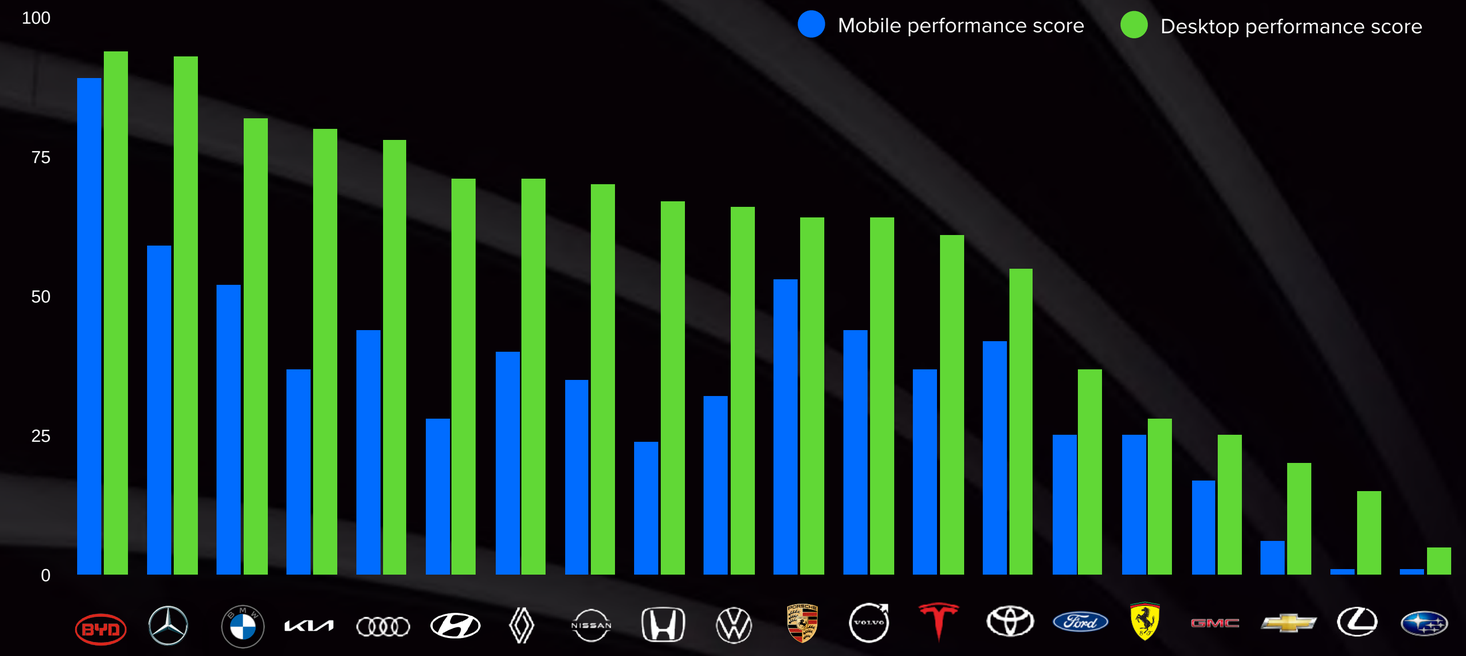
BYD’s webpage offers the best user experience according to Google’s speed and performance standards.

There are significant differences in overall performance between desktop and mobile devices for the analysed brands.

Most brands have web platforms that display webpage content relatively quickly in the users' browser. In all cases, mobile performance lags behind desktop performance.

BYD offered the best user experience last year as well.

Desktop and Mobile Performance Scores



Technical Remarks

Google PageSpeed Insights (PSI) report: Desktop and mobile performance scores are good indications of whether the webpages are meeting Google’s speed and performance standards. There is a strong correlation between higher scores and better keyword rankings. The scores represent diagnostic information about the page. A score of 90 or above is considered good. Scores between 50 to 90 indicate the need for improvement, while scores below 50 are considered poor.

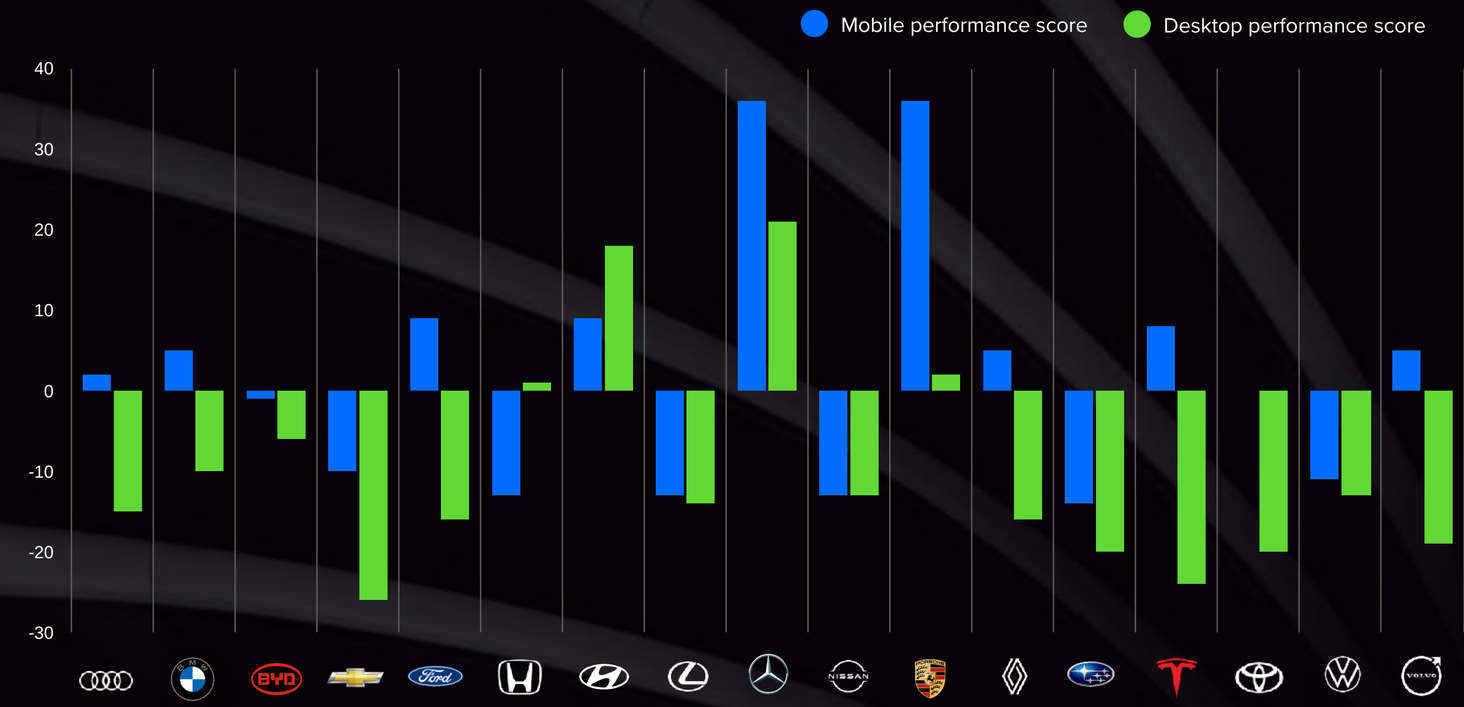
13 out or 18 brands' Desktop Performance scores declined compared to last year's analysis.

Brands like Mercedes-Benz and Porsche, with significant improvements in mobile and desktop performance, are likely to enhance their digital presence and reach due to better user experience and search engine rankings.

Conversely, brands such as Chevrolet, which saw substantial declines in performance scores, may face challenges in maintaining their digital reach and user engagement.

The comparative chart includes only the brands that were analyzed in both the 2023 and 2024 assessments. Since Ferrari's website could not be analyzed using the PageSpeed Insights tool last year, it is excluded from the comparative chart.

Desktop and Mobile Performance Score Changes 2023-2024



Technical Remarks

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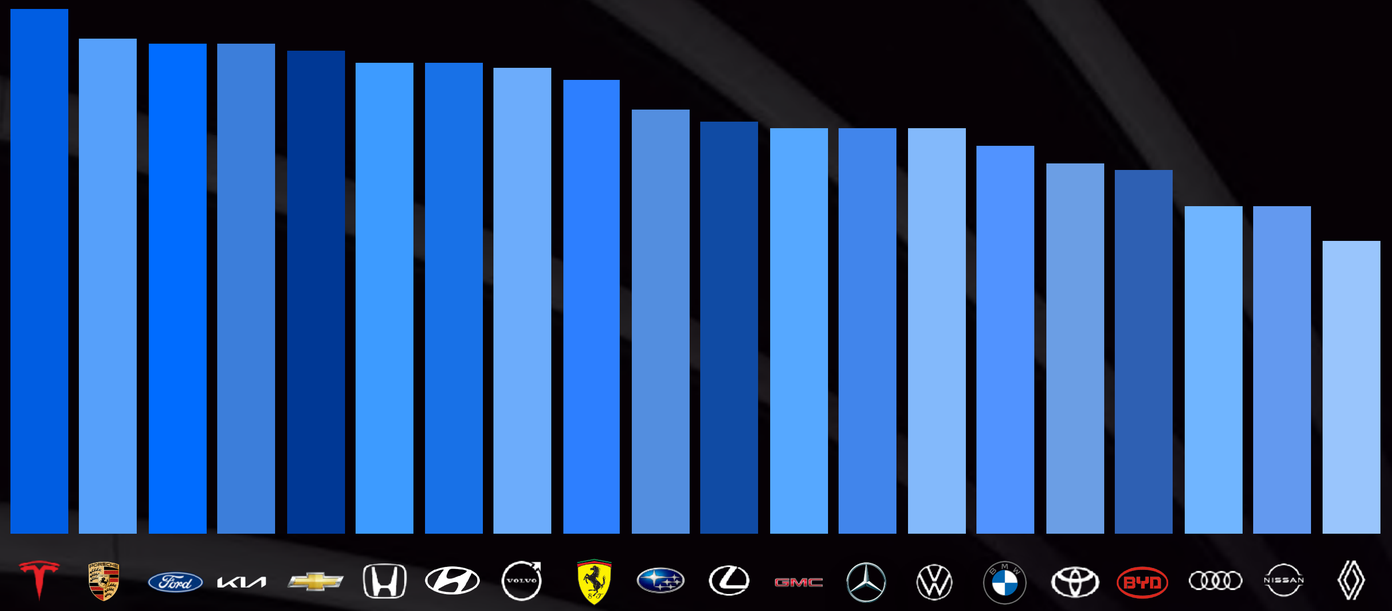
All brands have an Authority Score above 30. However, there is a substantial difference between the top five and the 20th brand.

Tesla and Porsche stand out due to the quantity and quality of backlinks they possess, as well as the strength and popularity of their domains. Websites with better overall keyword rankings and content that is relevant, regular, and geared towards the target audience tend to receive higher scores.

Tesla had the highest Authority Score in last year’s analysis as well.

Authority Score for the Domains of the Top 20 Automotive Brands*



Technical Remarks

* The Authority Score is primarily used for comparing domains and not for determining the absolute quality of a website. Thus, the Authority Score of a domain should be evaluated in comparison to similar websites in the same or similar niches. The Authority Score is based on a scale of 1 to 100, where a higher score indicates a better performance. However, a drop in the Authority Score does not necessarily translate to a drop in Google or other search engine rankings.

BYD experienced the highest increase in authority score with a 14-point gain, indicating a significant improvement in their digital authority and influence.

Ferrari and Hyundai both experienced positive changes, each increasing by 1 point. In contrast, Honda and Ford faced declines of 3 points, while Mercedes-Benz saw a significant drop of 5 points. Most other brands, including Tesla, Porsche, Lexus, Renault, Toyota, and Audi, saw no change in their authority scores suggesting consistent relative performance compared to their peers.

A decrease in Authority Score may reflect a combination of lost backlinks, decreased organic traffic, increased competition, spam signals, algorithm changes, or content relevance issues.

The comparative chart includes only the brands that were analyzed in both the 2023 and 2024 assessments.

Authority Score Changes Compared to 2023*

Technical Remarks

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Ford achieved the highest organic keyword growth, adding 1.4 million keywords, signaling a stronger search presence compared to last year.

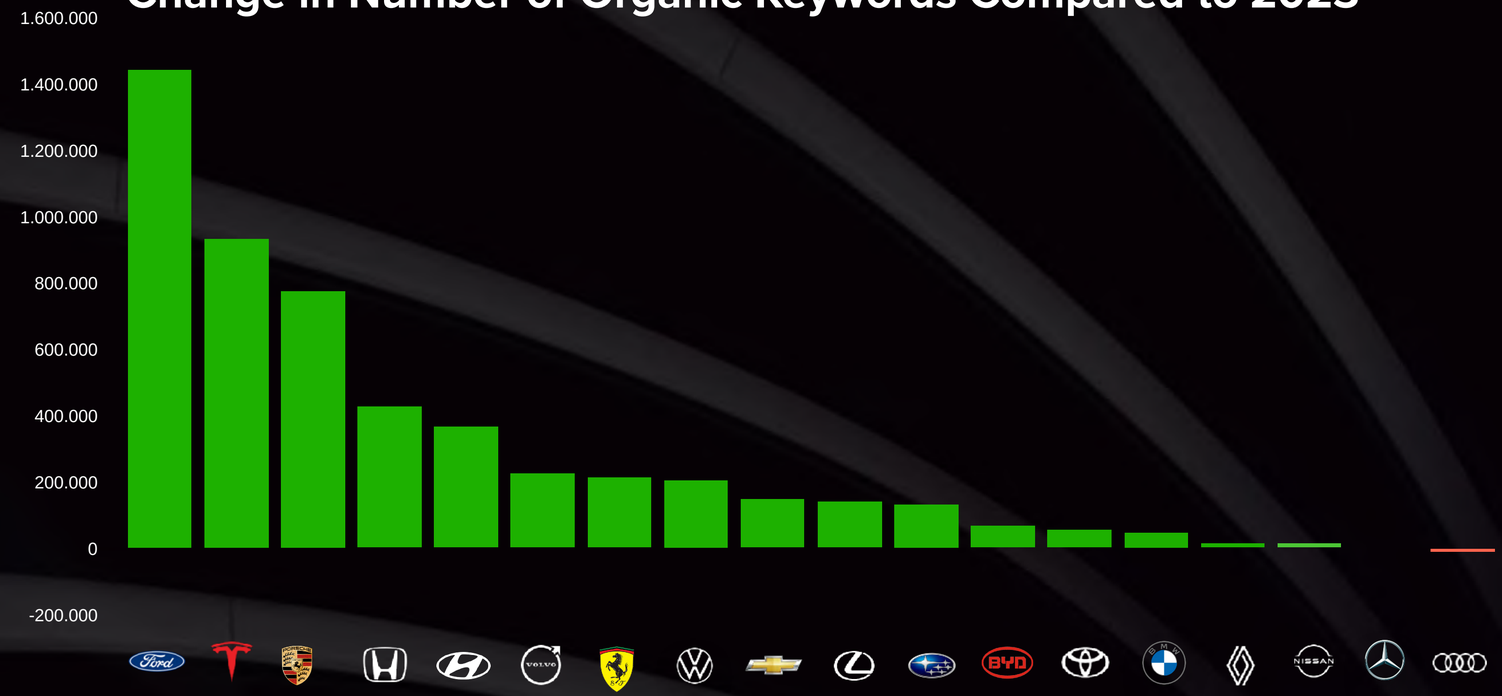
Tesla and Porsche also saw notable increases with 933K and 774K keywords, respectively.

In contrast, Audi experienced a significant decline, losing 9K organic keywords, reflecting a drop in visibility.

Between 2023 and 2024, Ford, Tesla, and Porsche led in organic keyword growth, while Mercedes-Benz and Audi saw declines, highlighting the need for improved SEO strategies to recover their search presence.

The comparative chart includes only the brands that were analyzed in both the 2023 and 2024 assessments.

Change in Number of Organic Keywords Compared to 2023



Between 2023 and 2024, Hyundai, Porsche, and Tesla experienced the most substantial increases in organic search traffic, gaining 3.7 million, 3.6 million, and 2.9 million visitors, respectively, indicating strong improvements in their digital presence.

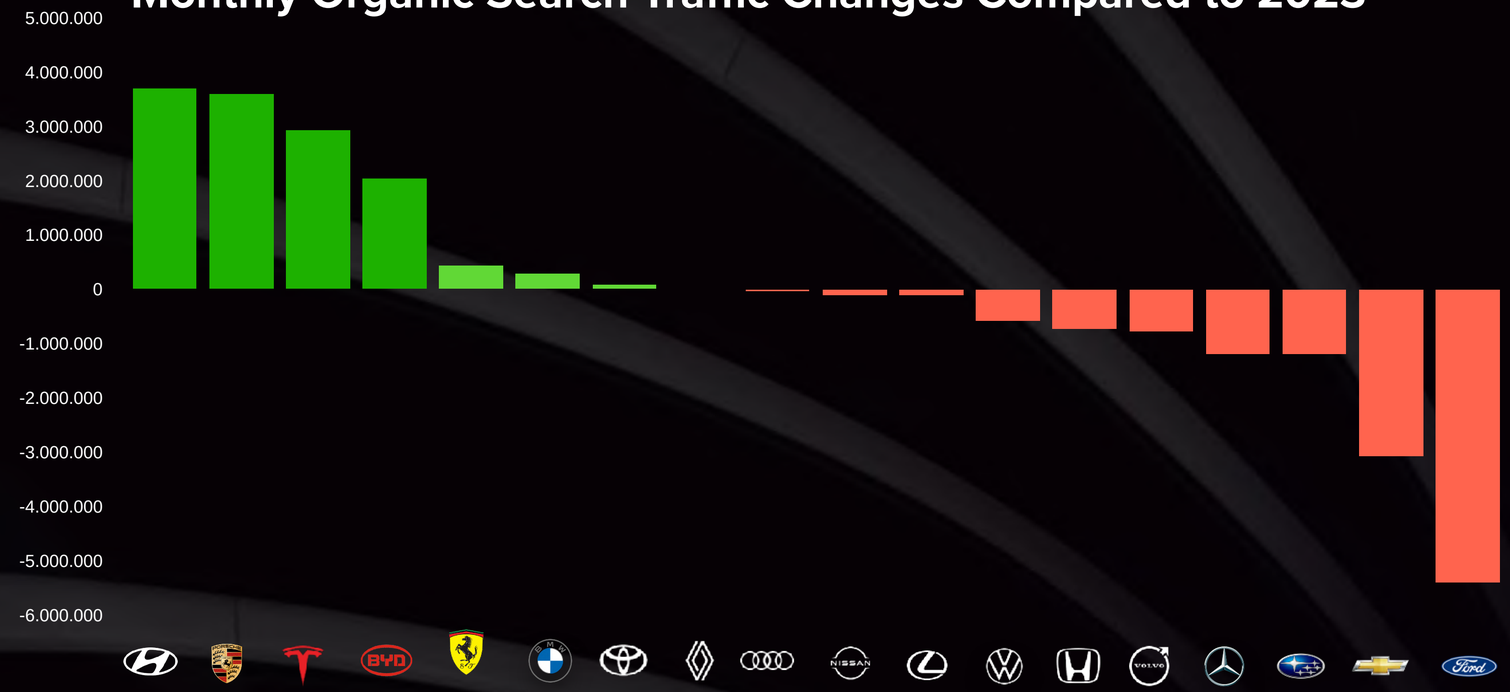
BYD also made significant strides with over 2 million new visits, reflecting its growing brand recognition.

Conversely, Ford saw the largest decline, losing over 5.3 million in organic traffic, followed by **Chevrolet** and **Mercedes-Benz**, which dropped by 3.1 million and 1.2 million visitors, respectively

These declines suggest a major shift in search performance, likely due to increased competition or gaps in SEO strategies

The comparative chart includes only the brands that were analyzed in both the 2023 and 2024 assessments.

Monthly Organic Search Traffic Changes Compared to 2023



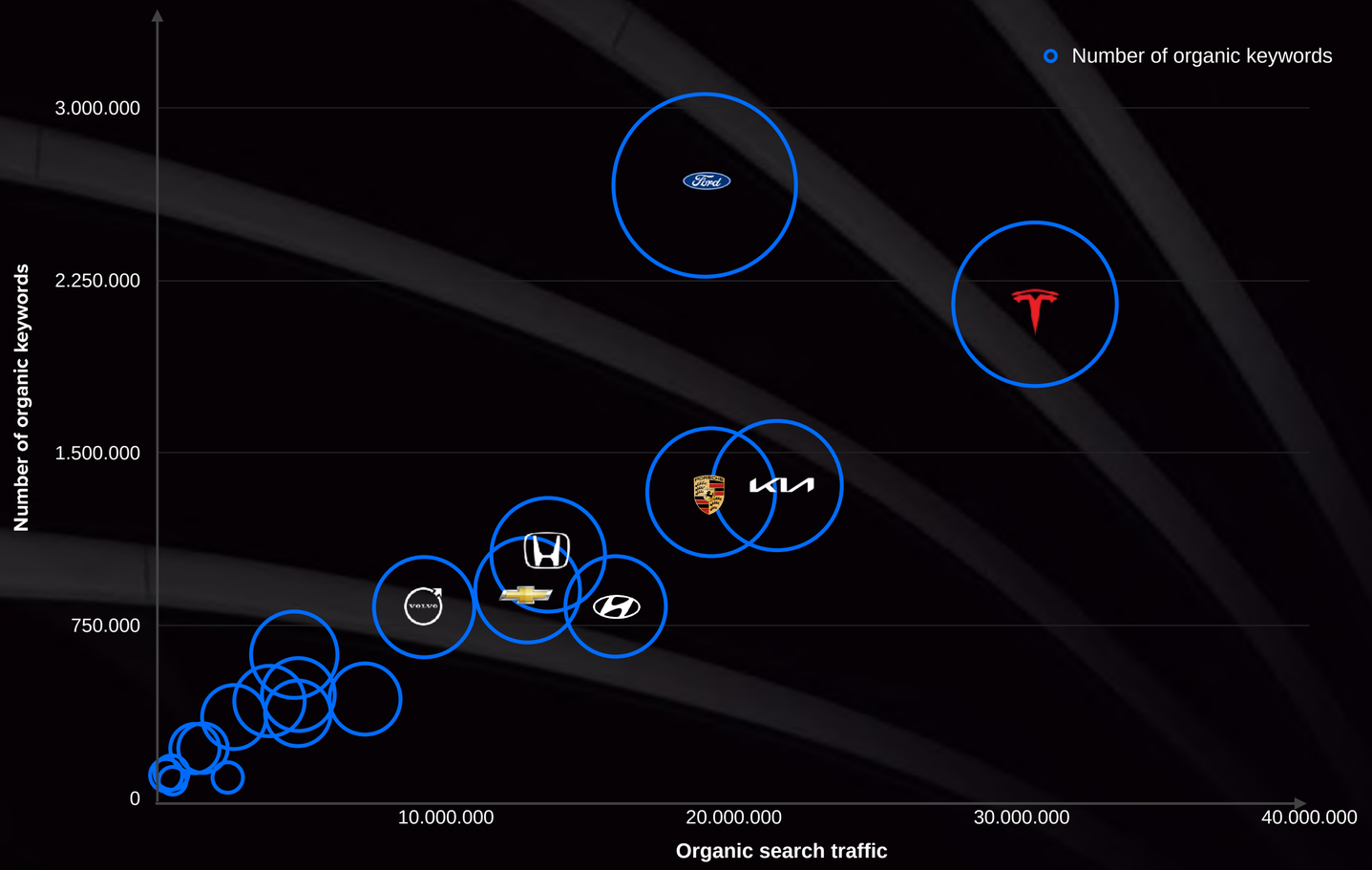
The size of the circle in the graph indicates the level of visibility of the domains in the organic search channel. Among the analysed brands, Ford and Tesla have the highest organic penetration, which is reflected in the larger size of their circles.

The organic penetration of Tesla and Ford is 3.2 times higher than the average number of organic keywords of the other brands. Typically, pages that are indexed for more keywords tend to receive more website visits from the organic channel.

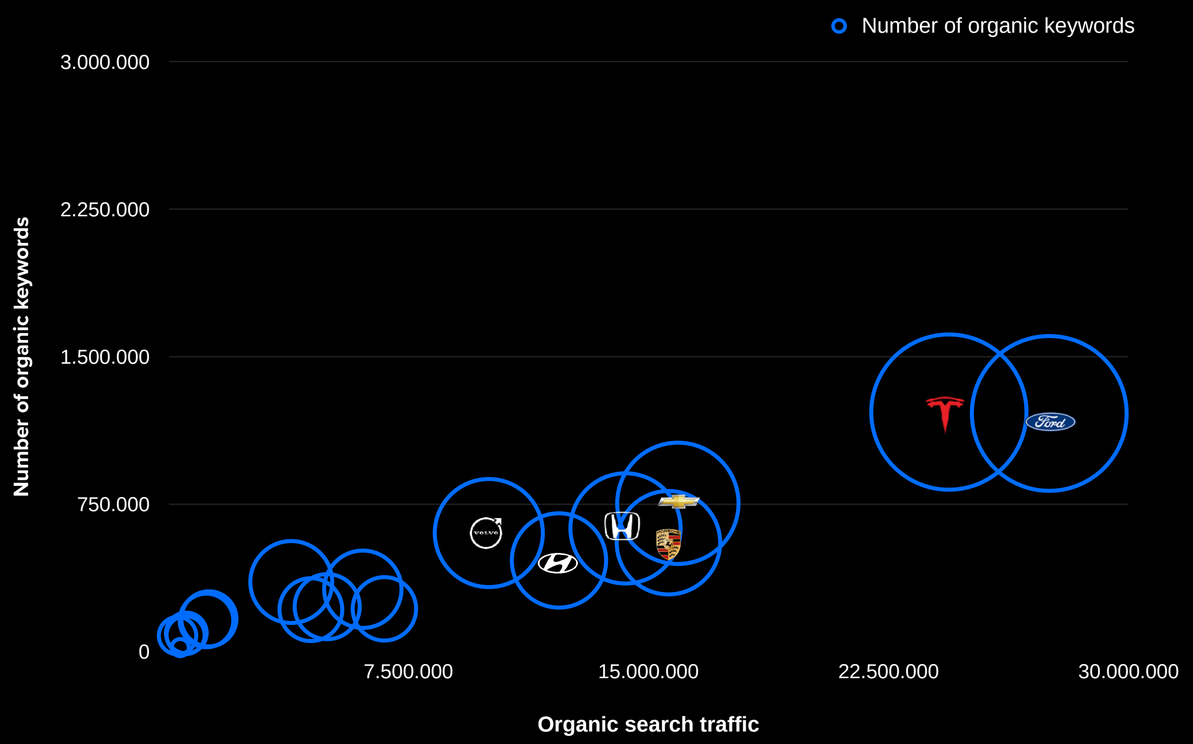
Organic penetration is determined by organic search traffic, and the number of keywords in Google search results. However, having a high number of keywords doesn't necessarily translate to a high volume of website visitors from search engines. The webpage may be indexed for keywords that have low search volumes.

Another possibility is that the keyword ranking position for which the page appears is low (e.g. they appear beyond the top 10 ranking positions).

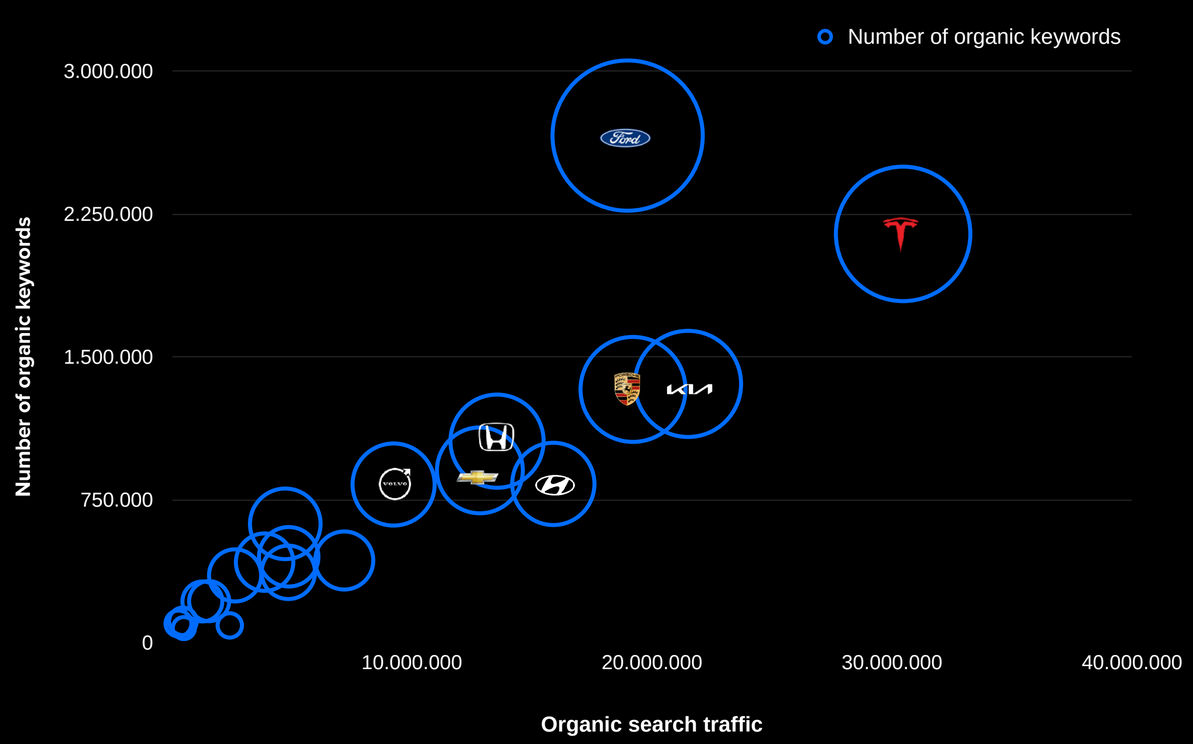
Organic Digital Penetration in 2024 Across the Analyzed Brands



Organic Digital Penetration in 2023 Across the Analyzed Brands



Organic Digital Penetration in 2024 Across the Analyzed Brands



When comparing 2022 to 2023, there has been a consistent trend in the brands' organic digital penetration rates. Ford saw a notable increase in organic keywords, yet its website traffic decreased significantly. Tesla also showed growth in organic penetration, maintaining strong keyword performance. In contrast, Audi experienced a decline in both organic search traffic and the number of organic keywords compared to last year.

OVERVIEW

	DESKTOP PERFORMANCE SCORE	MOBILE PERFORMANCE SCORE	SEO	PERFORMANCE	ACCESSIBILITY	BEST PRACTICES
Audi	78	44	85	61	85	100
BMW	82	52	99	67	98	78
BYD	94	89	69	92	74	96
Chevrolet	20	6	100	13	85	48
Ferrari	28	25	90	27	83	74
Ford	37	25	92	31	91	52
GMC	25	17	96	21	96	52
Honda	67	24	77	46	88	76
Hyundai	71	28	77	50	65	98
Kia	80	37	93	59	94	78
Lexus	15	1	73	8	78	52
Mercedes Benz	93	59	92	76	78	100
Nissan	70	35	91	53	88	98
Porsche	64	53	100	59	100	89
Renault	71	40	100	56	87	98
Subaru	5	1	96	3	95	52
Tesla	61	37	91	49	96	100
Toyota	55	42	91	49	78	78
Volkswagen	66	32	91	49	90	96
Volvo	64	44	93	54	100	74

Brands with the best performance based on the listed KPIs

Data values that have the highest score in the listed KPIs

Data values that are close to the highest score in the listed KPIs

OVERVIEW

	NUMBER OF BACKLINKS	NUMBER OF VISITS	NUMBER OF ORGANIC KEYWORDS	ORGANIC SEARCH TRAFFIC	AUTHORITY SCORE
Audi	6.194.872	1.400.000	76.073	499.764	55
BMW	6.339.404	1.800.000	217.600	1.553.816	65
BYD	2.961.990	7.200.000	90.139	2.413.184	61
Chevrolet	16.684.322	8.400.000	904.455	12.831.405	81
Ferrari	13.654.584	3.400.000	431.118	7.181.218	76
Ford	72.740.883	21.400.000	2.662.505	18.985.493	82
GMC	3.808.056	3.500.000	623.513	4.725.103	68
Honda	24.522.695	15.100.000	1.057.694	13.545.756	79
Hyundai	11.209.332	25.600.000	833.320	15.890.442	79
Kia	14.250.216	29.800.000	1.358.470	21.500.845	82
Lexus	9.936.100	5.400.000	368938	4.851.605	69
Mercedes Benz	17.884.232	6.500.000	352847	2.635.082	68
Nissan	3.379.841	494.300	111.630	460.529	55
Porsche	38.987.993	13700000	1.329.522	19.209.722	83
Renault	3.757.599	813.000	100.090	275.427	49
Subaru	3.880.831	6.700.000	450.639	4.867.703	71
Tesla	17.402.216	50.400.000	2146244	30.460.665	88
Toyota	7.872.083	1.400.000	215.908	1.271.952	62
Volkswagen	3.892.083	4.300.000	422.413	3.863.800	68
Volvo	16.397.588	17.600.000	830.138	9.237.532	78

Brands with the best performance based on the listed KPIs

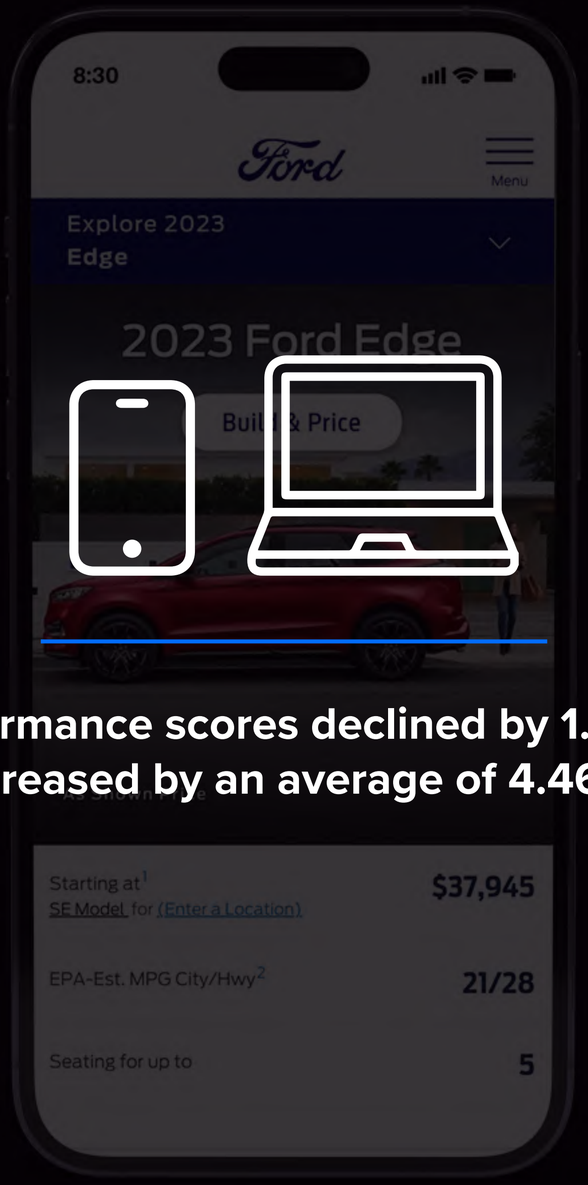
Data values that have the highest score in the listed KPIs

Data values that are close to the highest score in the listed KPIs

OVERVIEW

	NUMBER OF BACKLINKS	NUMBER OF VISITS	NUMBER OF ORGANIC KEYWORDS	ORGANIC SEARCH TRAFFIC	AUTHORITY SCORE
Audi	-22.41%	-6.67%	-10.78%	-6.99%	0.00%
BMW	+56.86%	+28.57%	+29.64%	+22.91%	-1.52%
BYD	+112.58%	+1.037.62%	+318.32%	+553.23%	+29.79%
Chevrolet	+73.37%	+16.67%	+19.72%	-19.38%	-2.41%
Ferrari	-12.60%	+3.03%	+97.11%	+6.43%	+1.33%
Ford	-51.54%	+16.30%	+118.32%	-22.13%	-3.53%
Honda	+54.73%	+45.19%	+68.43%	-5.14%	-3.66%
Hyundai	-46.21%	+47.98%	+79.26%	+30.24%	+1.28%
Lexus	-17.31%	+31.71%	+60.61%	-2.20%	0.00%
Mercedes Benz	-34.60%	-14.47%	-0.66%	-31.33%	-6.85%
Nissan	+51.98%	+52.19%	+16.20%	-17.61%	-1.79%
Porsche	+157.91%	+30.48%	+139.47%	+22.98%	0.00%
Renault	+39.28%	+51.99%	+21.43%	-3.27%	0.00%
Subaru	+25.07%	+42.55%	+41.58%	-19.85%	-2.74%
Tesla	-47.66%	+10.77%	+76.98%	+10.69%	0.00%
Toyota	-9.45%	+3.888.60%	+35.30%	+7.02%	0.00%
Volkswagen	+11.05%	+48.28%	+96.72%	-13.18%	-2.86%
Volvo	+639.65%	+58.97%	+37.39%	-7.71%	-2.50%

Most of the automotive brands analysed have low mobile performance scores, indicating that their websites require improvements, especially in terms of reducing perceived latency on mobile devices.

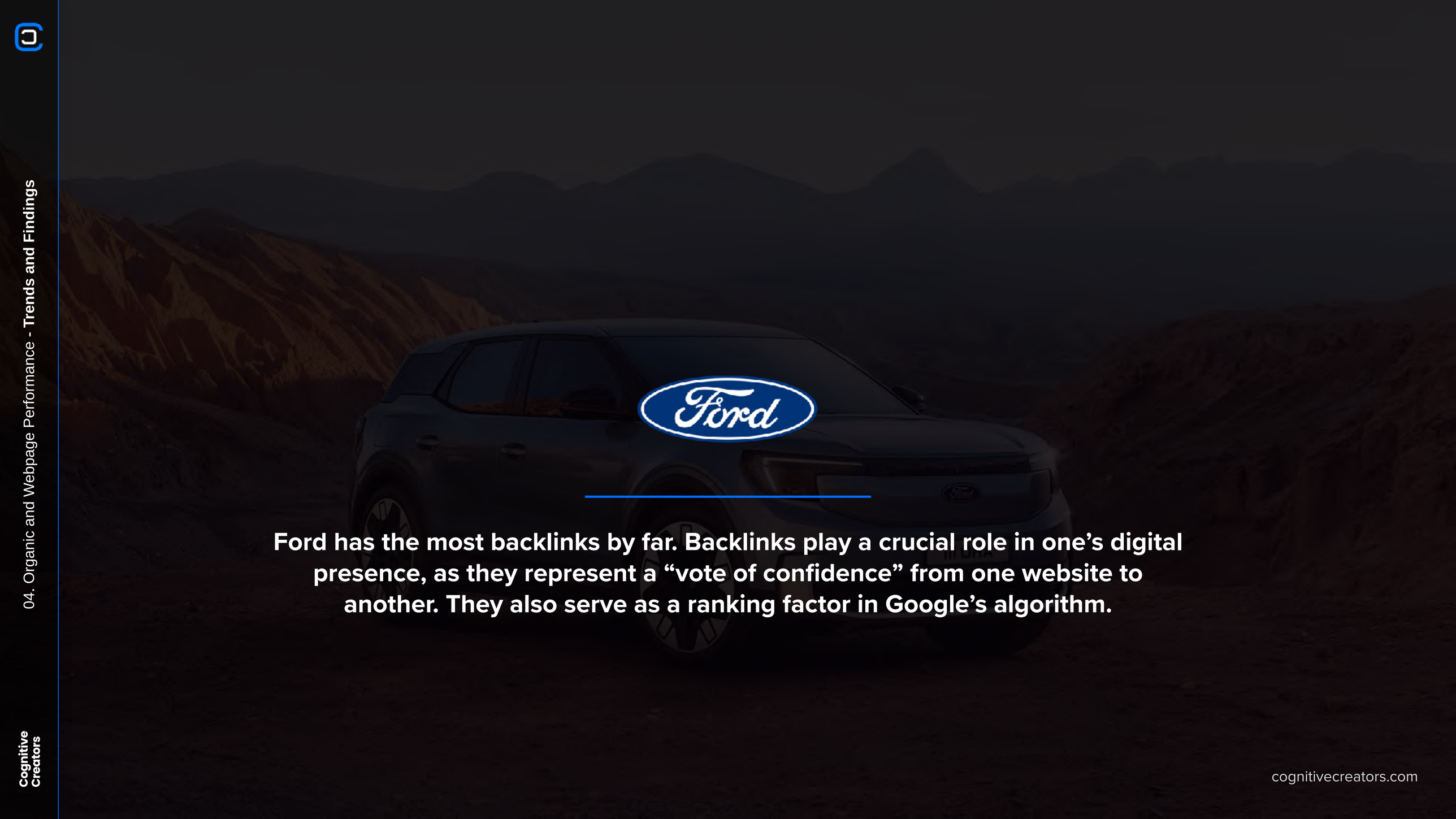


Overall webpage performance scores declined by 1.59%, while SEO scores increased by an average of 4.46%.

BYD has seen the largest increase in organic search traffic, the number of organic keywords, and authority score. Volvo has increased their number of backlinks compared to last year. Toyota has grown their number of visits the most compared to last year.

BYD’s webpage offers the best user experience the second time in a row according to Google’s speed and performance standards.

Tesla and Ford have the highest level of organic penetration.



Ford has the most backlinks by far. Backlinks play a crucial role in one's digital presence, as they represent a "vote of confidence" from one website to another. They also serve as a ranking factor in Google's algorithm.

05. **Digital Band Strength**

Those brands that consistently maintain their popularity are likely to have a strong digital strategy in place. In contrast, newcomers like Tesla and BYD appear to have disrupted the traditional approach.

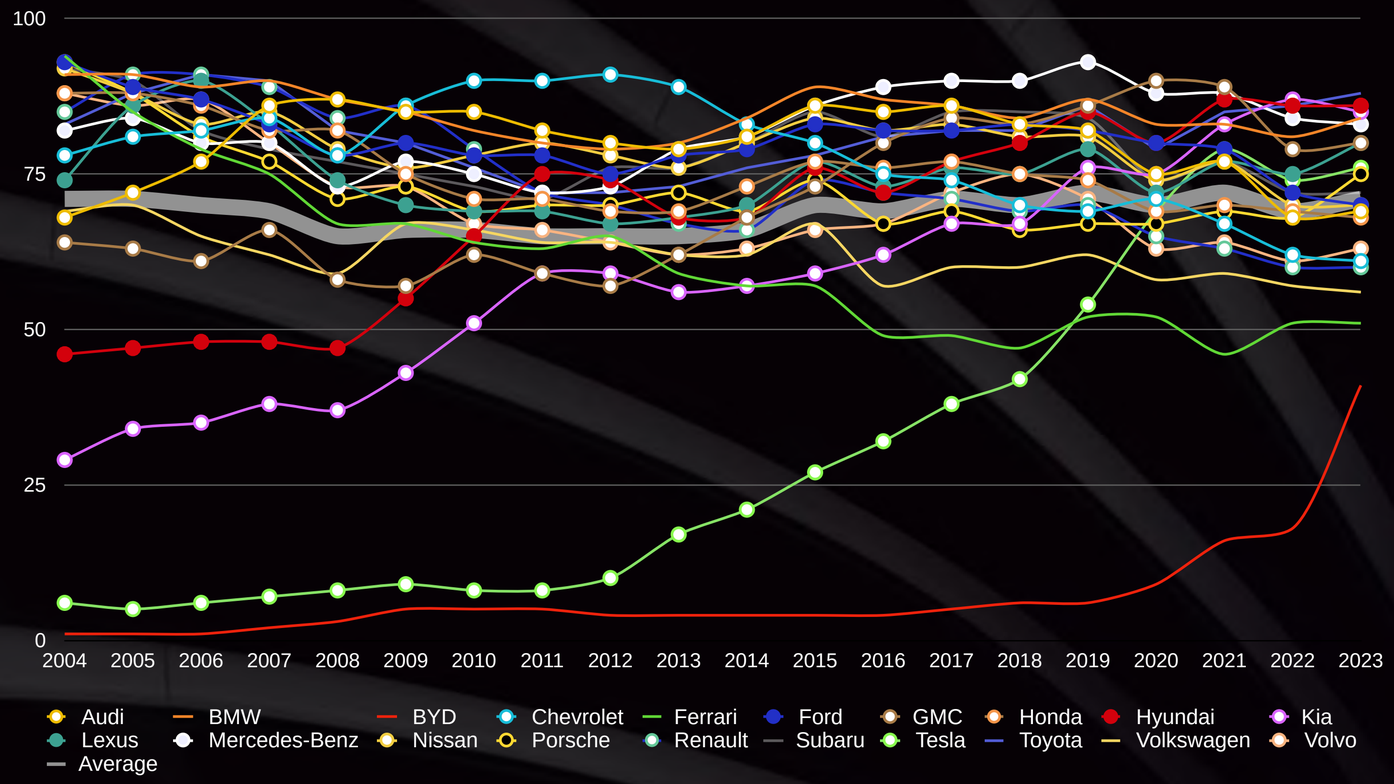
The established brands – Audi, Subaru, Nissan, Ford, Toyota, Lexus, Mercedes-Benz and BMW – have consistently maintained above-average levels of interest over the past 20 years.

Toyota, Mercedes-Benz, BMW and Ford had the biggest impact overall in the past 20 years on the automotive industry based on digital popularity.

In 2023, Hyundai, Toyota, Kia, and BMW have been the most impactful brands in the automotive industry.

The average compound annual growth rate (CAGR) for the 20 brands over the last 10 years is 0.92%.

Relative Digital Popularity of the Top 20 Automotive Brands by Brand Value



Technical Remarks

This chart reflects how many searches have been run for the automotive brand terms relative to the total number of searches on Google. A line trending downward indicates a decrease in the brand terms' relative popularity – the total number of searches for that term may not necessarily decrease, but its popularity compared to other searches is shrinking.

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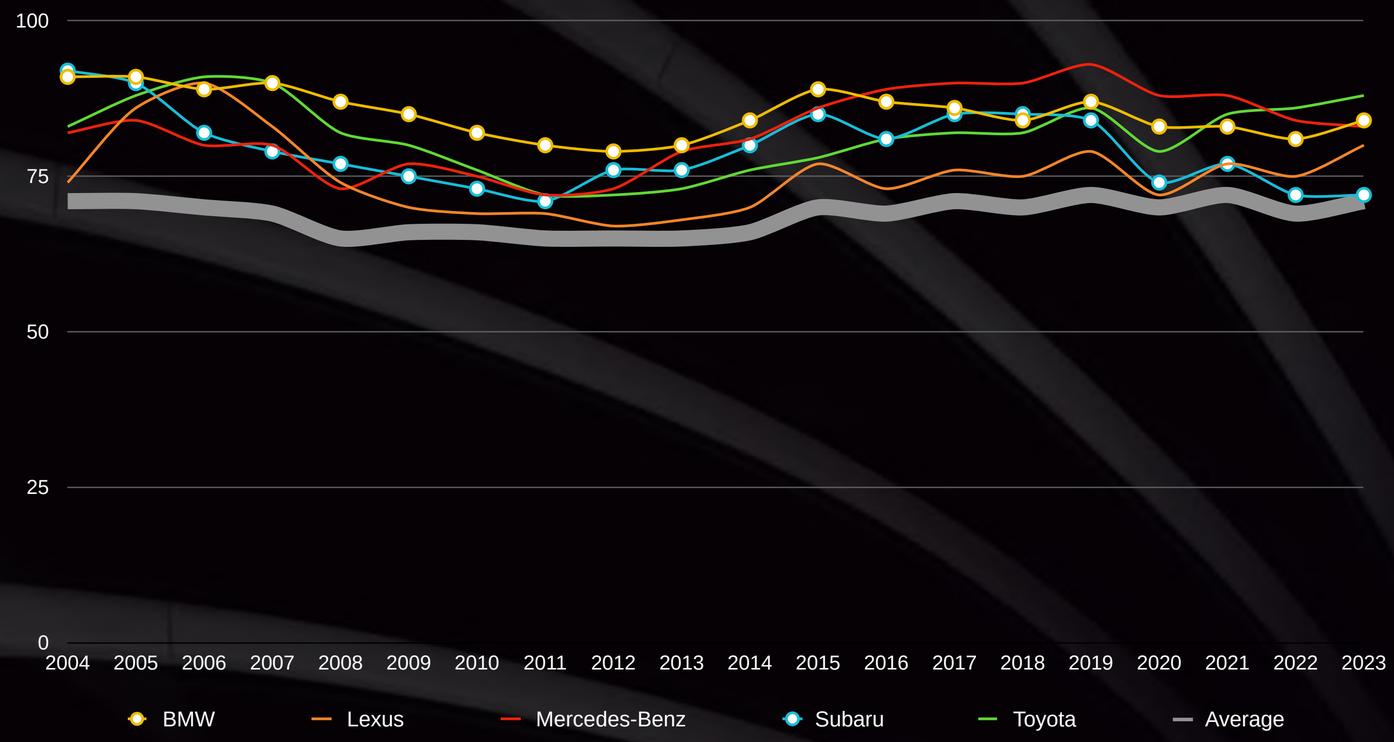
In 2023, Hyundai, Toyota, Kia, and BMW have been the most impactful brands in the automotive industry.

The average compound annual growth rate (CAGR) for the five brands over the last 10 years is 0.84%.

The Top 5 Automotive Brands with Above-Average Relative Digital Popularity Over the Past 19 Years



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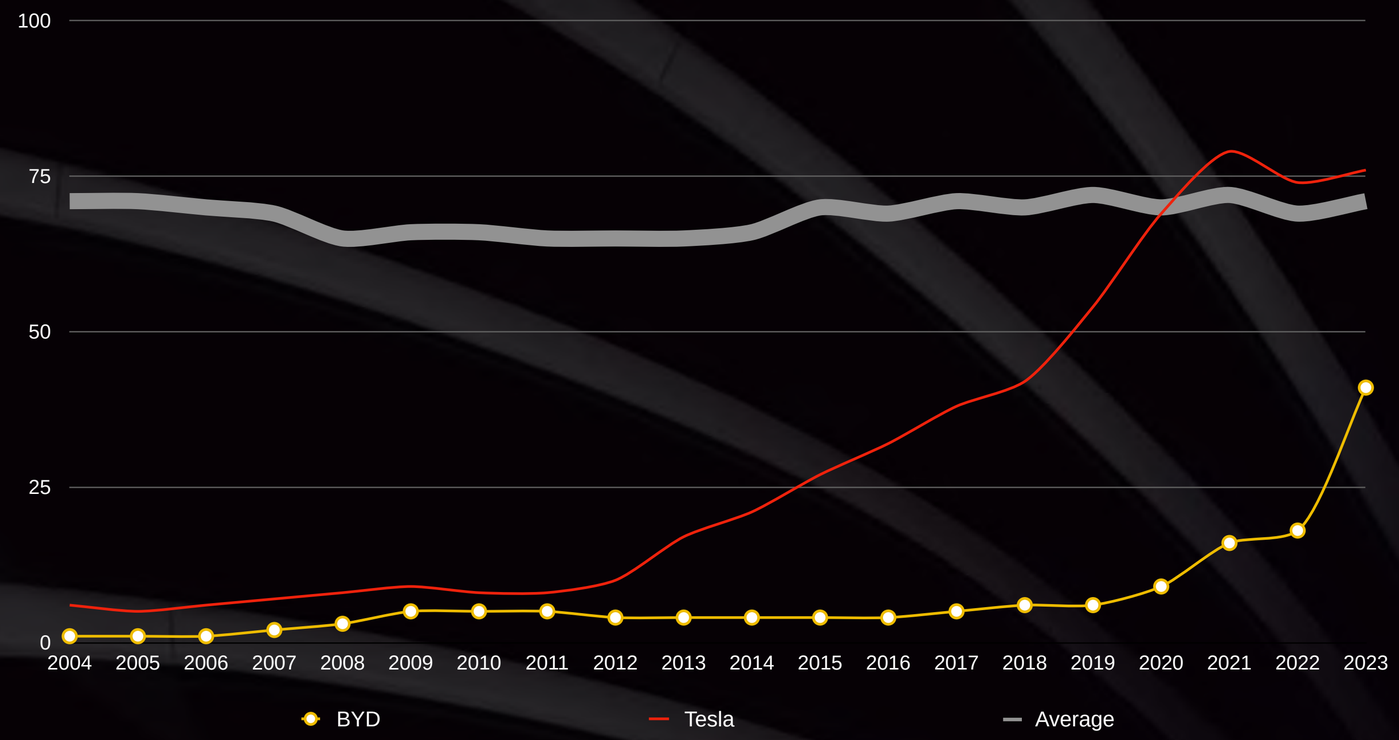
The compound annual growth rate (CAGR) for BYD over the last 10 years is 26.87%, while Tesla's CAGR is 15.87%.

Relative Digital Popularity of Automotive Brands with a CAGR Greater than 10% Over the Last 10 Years



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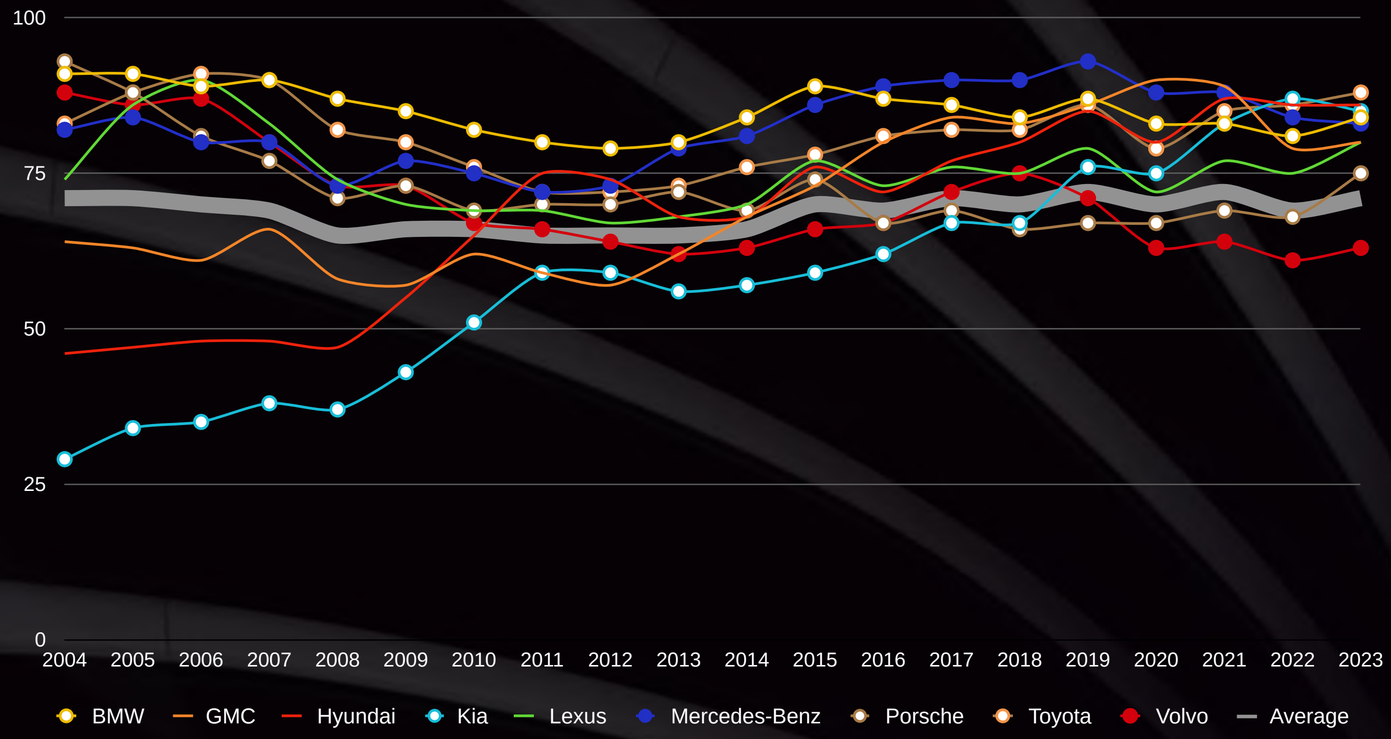
In 2023, Hyundai, Toyota, Kia, and BMW have been the most impactful brands in the automotive industry.

The average compound annual growth rate (CAGR) for the nine brands over the last 10 years is 1.54%.

Relative Digital Popularity of Automotive Brands with a CAGR Between 1% and 10% Over the Last 10 Years



Technical Remarks

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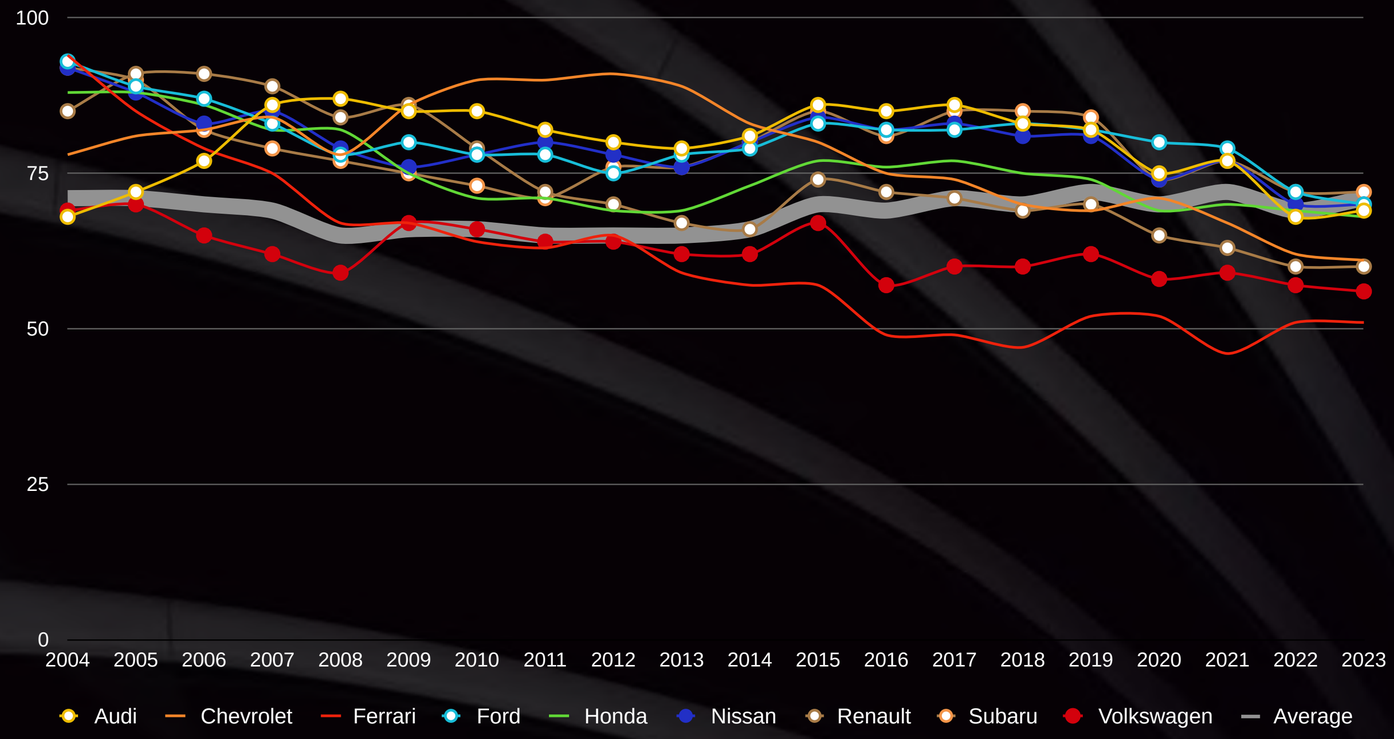
In 2023, Hyundai, Toyota, Kia, and BMW have been the most impactful brands in the automotive industry.

The average compound annual growth rate (CAGR) for the nine brands over the last 10 years is -1.24%.

Relative Digital Popularity of Automotive Brands with Negative CAGR Over the Last 10 Years



Technical Remarks

This chart reflects how many searches have been run for the automotive brand terms relative to the total number of searches on Google. A line trending downward indicates a decrease in the brand terms' relative popularity – the total number of searches for that term may not necessarily decrease, but its popularity compared to other searches is shrinking.

BYD is the only brand that consistently shown growth in the past five years. They has emerged as a leader in the EV market, particularly in China. The company has expanded its presence globally, increasing sales significantly.

Tesla continues to lead the EV market with record sales, significantly increasing its production capacity and expanding its model lineup. The brand's focus on innovation and technology has solidified its position as a market leader.

Overall the popularity of the top 20 brands in the automotive industry has grown since last year by 7,69%.

Year-over-Year Growth Rate of Automotive Brands' Relative Popularity in Google Search

(Year-over-year analysis, comparative chart for the years 2018-2023)

ANNUAL INCREASE IN INTEREST (GOOGLE TRENDS)	2019	2020	2021	2022	2023
Audi	-1,51%	-8,37%	2,67%	-10,95%	0,73%
BMW	4,15%	-4,89%	-0,50%	-2,50%	4,81%
BYD	-4,11%	55,71%	70,64%	15,59%	131,16%
Chevrolet	-1,32%	3,76%	-5,50%	-7,92%	-2,15%
Ferrari	11,83%	0,32%	-11,82%	10,14%	0,99%
Ford	-0,40%	-2,84%	-1,15%	-9,18%	-2,67%
GMC	3,53%	5,65%	-1,57%	-11,80%	2,02%
Honda	-0,78%	-6,74%	0,96%	-1,43%	-0,97%
Hyundai	7,34%	-6,64%	8,89%	-0,77%	0,00%
Kia	13,52%	-1,53%	10,65%	5,12%	-3,24%
Lexus	5,33%	-9,48%	7,57%	-3,03%	6,92%
Mercedes-Benz	2,49%	-5,22%	0,76%	-4,90%	-1,09%
Nissan	-0,31%	-8,79%	4,08%	-8,39%	-0,59%
Porsche	1,25%	-0,74%	3,37%	-1,09%	9,89%
Renault	1,33%	-7,86%	-2,45%	-4,37%	-0,14%
Subaru	-1,08%	-11,06%	3,58%	-6,70%	0,70%
Tesla	29,42%	26,42%	14,70%	-6,36%	2,60%
Toyota	4,15%	-8,25%	7,62%	1,08%	2,82%
Volkswagen	3,50%	-6,76%	3,33%	-3,37%	-1,74%
Volvo	-5,26%	-11,22%	2,53%	-5,58%	3,71%
Average	**3,65%**	**-0,43%**	**5,92%**	**-2,82%**	**7,69%**

Kia and Hyundai have launched successful electric models, with Hyundai's Ioniq 5 and Kia's EV6 gaining popularity. Their commitment to electrification and innovative designs have led to increased market share and sales growth in the EV segment.

Tesla continues to lead the EV market with record sales, significantly increasing its production capacity and expanding its model lineup. The brand's focus on innovation and technology has solidified its position as a market leader.

GMC has shown resilience and growth in certain segments, particularly in the premium truck and SUV markets, while also navigating challenges in fleet sales.

BYD has become a dominant force in the electric vehicle market, surpassing Tesla in sales volume in 2022. The company has expanded its global presence and diversified its offerings, including electric buses and trucks, leading to substantial growth in both production and sales.

Overall, brands that have aggressively pursued electrification and positioned themselves in the luxury market have experienced the most significant growth in the automotive industry over the past five years.

Relative Popularity of Automotive Brands in Google Search

(Comparative chart for the years 2004-2023)

	Average from 2004 to 2023	Average from 2004 to 2018	Average from 2019 to 2023	Last 5 years vs. the first 15 years	Last 5 years vs. entire 19-year period	CAGR from 2013 to 2023	CAGR from 2018 to 2023	CAGR from 2020 to 2023
Audi	80	81	74	-8,98%	-6,89%	-1,31%	-1,83%	-0,82%
BMW	85	85	84	-2,11%	-1,59%	0,50%	0,07%	0,17%
BYD	7	4	18	393,28%	148,73%	26,87%	21,14%	16,38%
Chevrolet	78	82	66	-19,44%	-15,32%	-3,73%	-1,36%	-1,60%
Ferrari	61	65	50	-22,57%	-17,94%	-1,47%	0,96%	-0,19%
Ford	81	82	77	-6,53%	-4,98%	-1,13%	-1,66%	-1,34%
GMC	71	66	85	27,49%	19,29%	2,61%	-0,32%	-1,21%
Honda	75	77	70	-9,23%	-7,09%	-0,15%	-0,92%	-0,15%
Hyundai	68	63	85	34,61%	23,89%	2,40%	0,80%	0,78%
Kia	58	50	81	61,94%	40,23%	4,20%	2,32%	1,19%
Lexus	75	75	76	2,37%	1,77%	1,68%	0,62%	1,10%
Mercedes-Benz	82	81	87	8,09%	5,95%	0,53%	-0,82%	-0,54%
Nissan	80	82	74	-9,16%	-7,03%	-0,84%	-1,48%	-0,53%
Porsche	73	74	69	-6,33%	-4,82%	0,46%	1,22%	1,17%
Renault	74	78	64	-18,30%	-14,39%	-1,08%	-1,39%	-0,71%
Subaru	79	80	76	-5,54%	-4,22%	-0,42%	-1,54%	-0,27%
Tesla	30	16	70	334,22%	136,56%	15,87%	6,07%	0,98%
Toyota	81	80	85	5,50%	4,07%	1,95%	0,67%	1,13%
Volkswagen	62	63	58	-7,88%	-6,03%	-0,99%	-0,54%	-0,19%
Volvo	70	72	64	-11,27%	-8,70%	0,17%	-1,68%	0,04%
Average	**69**	**68**	**71**	**37,01%**	**14,07%**	**2,31%**	**1,02%**	**0,77%**

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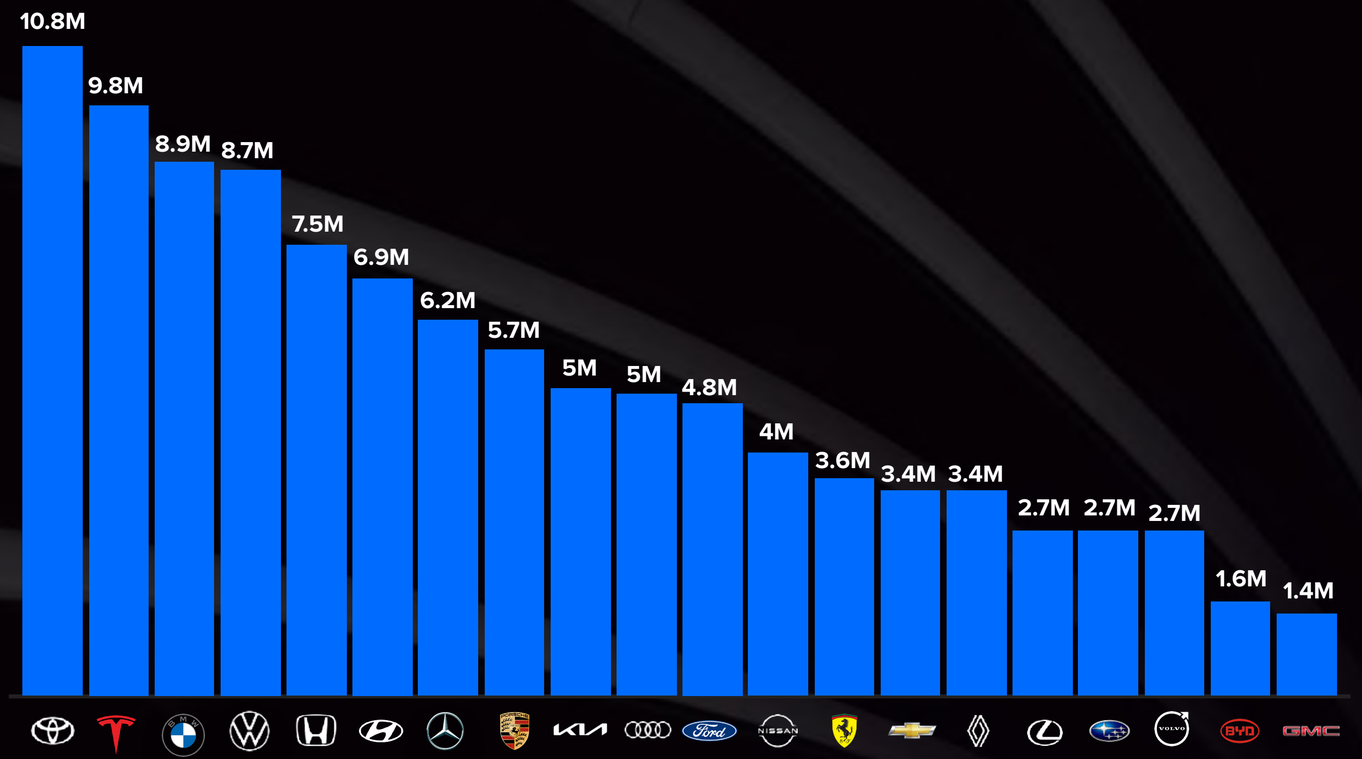
Toyota and Tesla prove to be the two most searched automotive brands, followed by BMW and Volkswagen.

Average Monthly Search Volume for Brands in 2023*



*Average monthly search volume is a metric that estimates the average number of searches for a particular keyword or phrase on Google per month. It is a key metric in keyword research and search engine optimization (SEO) as it indicates the potential demand and interest for a specific topic or product.

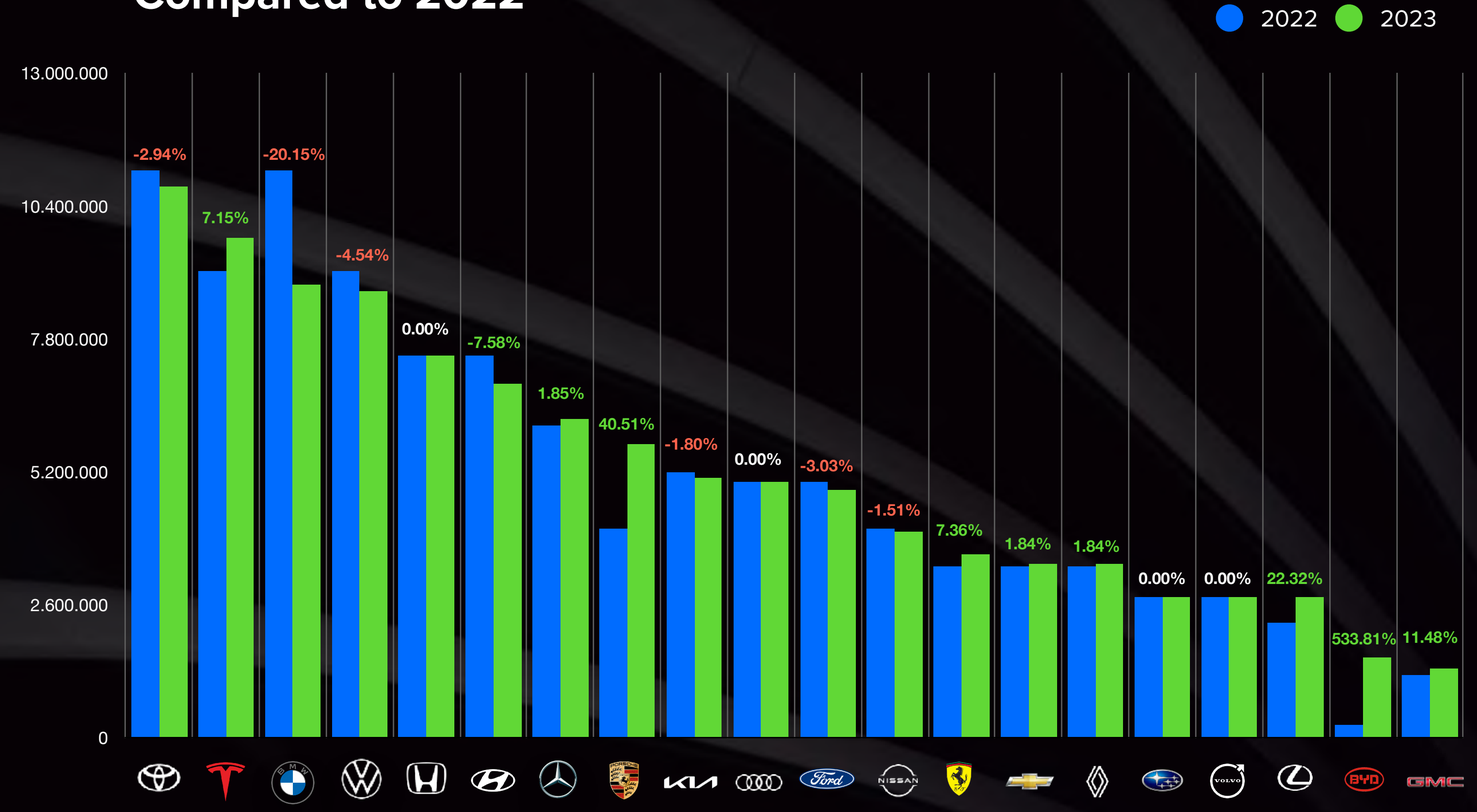
BYD stands out with an extraordinary 533.81% increase in search volume, suggesting an immense surge in interest, likely due to the brand's growing prominence in the electric vehicle (EV) sector. But the monthly search volume for BYD is still negligible compared to competitors.

Similarly, Porsche (40.51%), Tesla (7.15%), and Ferrari (7.36%) have experienced significant upward momentum, aligning with the growing demand for luxury, high-performance, and electric vehicles.

Brands such as BMW (-20.15%), Honda (-7.58%), and Toyota (-2.94%) show a notable decline in search volume.

Brands like Volkswagen, Kia, Ford, Nissan, Subaru, and Volvo have mixed performance with slight declines or no significant change, reflecting a neutral consumer sentiment.

Average Monthly Search Volume for Brands in 2023 Compared to 2022*



*Average monthly search volume is a metric that estimates the average number of searches for a particular keyword or phrase on Google per month. It is a key metric in keyword research and search engine optimization (SEO) as it indicates the potential demand and interest for a specific topic or product.

When it comes to brand search volume and popularity, Toyota, Tesla, and BMW are the top three automotive brands. Moreover, Toyota is currently the world's most valuable automotive brand for the second consecutive year, holding a slight lead ahead of Tesla. BMW follows closely in third place behind Toyota and Tesla. The biggest growth in search occurred to BYD who has grown nearly five times to their size in search volume since last year.

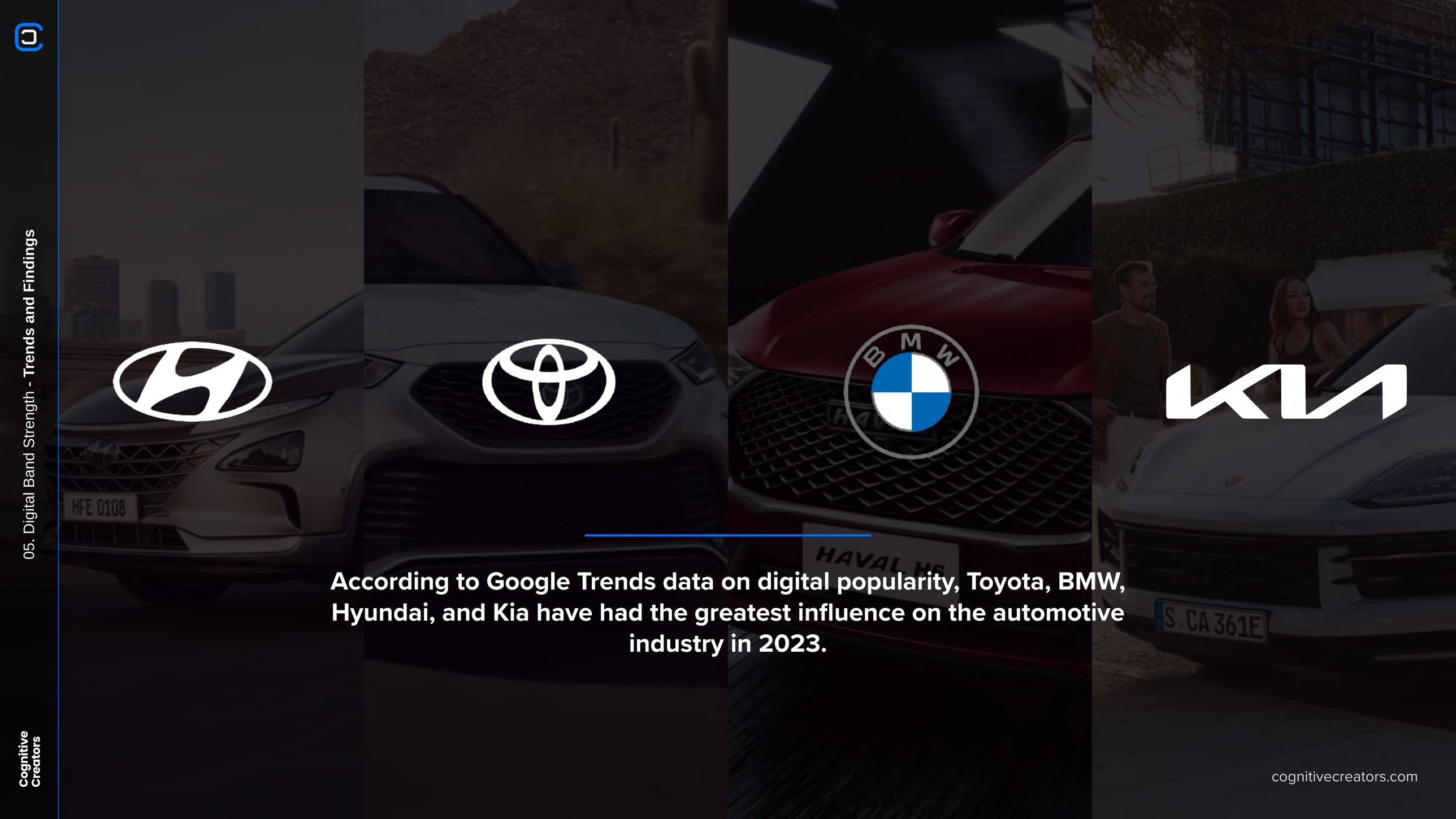
The level of interest scores are measured on a relative scale, with 100 being the most commonly searched query, 50 being a query searched half as often as the most popular one, and so on.

	AVERAGE MONTHLY SEARCHES FOR BRAND NAME IN 2023	YOY CHANGE IN AVERAGE MONTHLY SEARCHES FOR BRAND NAME BETWEEN 2022 AND 2023	LEVEL OF INTEREST IN 2023	AVERAGE LEVEL OF INTEREST IN 2022 AND 2023	YOY CHANGE IN THE AVERAGE LEVEL OF INTEREST BETWEEN 2022 AND 2023
Audi	5.000.000	0.00%	69	69	0.73%
BMW	8.863.333	-20.15%	84	83	4.81%
BYD	1.559.167	533.81%	41	30	131.16%
Chevrolet	3.411.667	1.84%	61	61	-2.15%
Ferrari	3.596.667	7.36%	51	51	0.99%
Ford	4.848.333	-3.03%	70	71	-2.67%
GMC	1.360.000	11.48%	80	79	2.02%
Honda	7.480.000	0.00%	68	69	-0.97%
Hyundai	6.913.333	-7.58%	86	86	0.00%
Kia	5.093.333	-1.80%	85	86	-3.24%
Lexus	2.740.000	22.32%	80	77	6.92%
Mercedes Benz	6.233.333	1.85%	83	84	-1.09%
Nissan	4.028.333	-1.51%	70	70	-0.59%
Porsche	5.746.667	40.51%	75	72	9.89%
Renault	3.411.667	1.84%	60	60	-0.14%
Subaru	2.740.000	0.00%	72	72	0.70%
Tesla	9.793.333	7.15%	76	75	2.60%
Toyota	10.773.333	-2.94%	88	87	2.82%
Volkswagen	8.725.000	-4.54%	56	57	-1.74%
Volvo	2.740.000	0.00%	63	62	3.71%

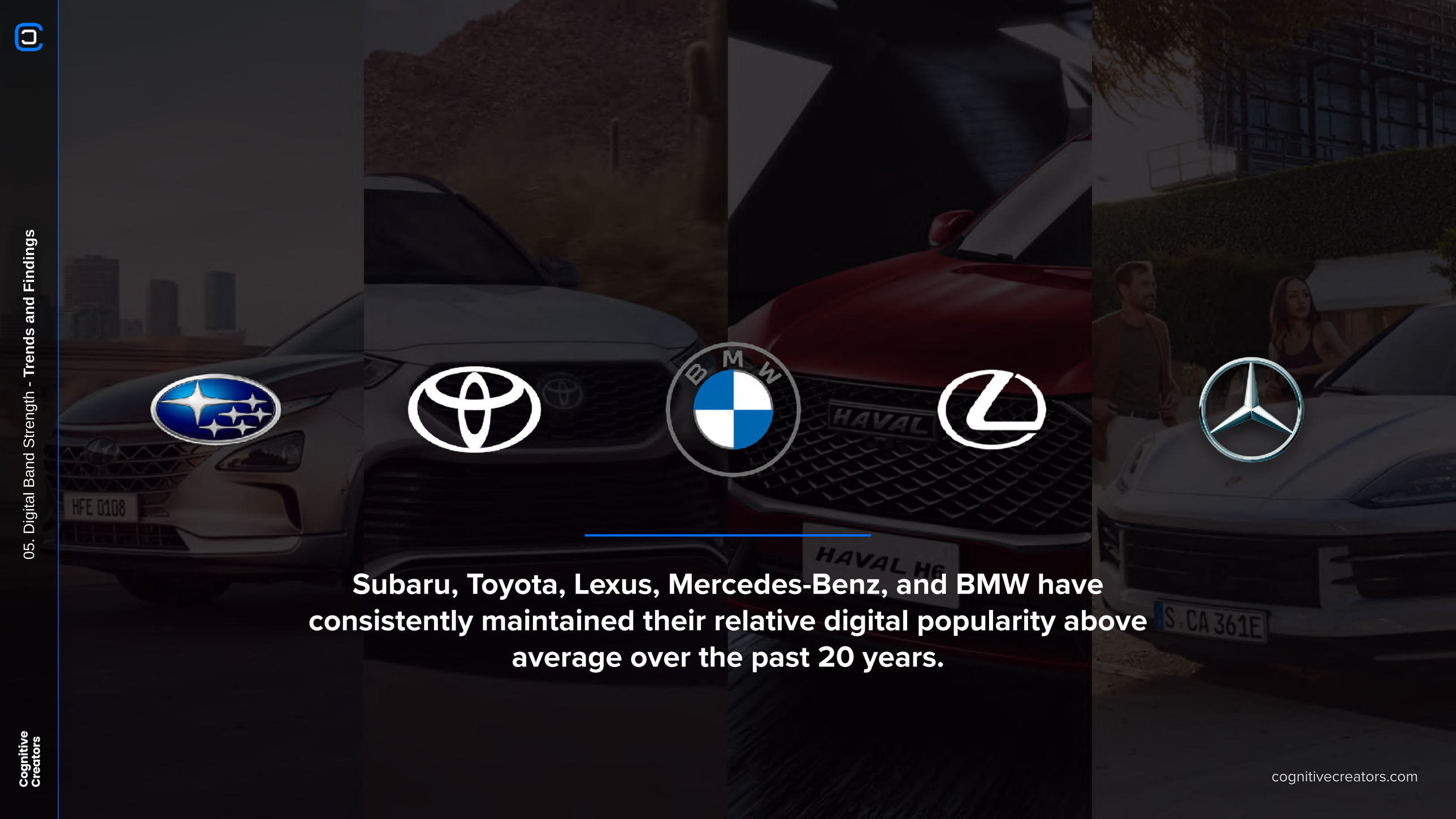
Brands with the best performance based on the listed KPIs

Data values that are close to the highest score in the listed KPIs

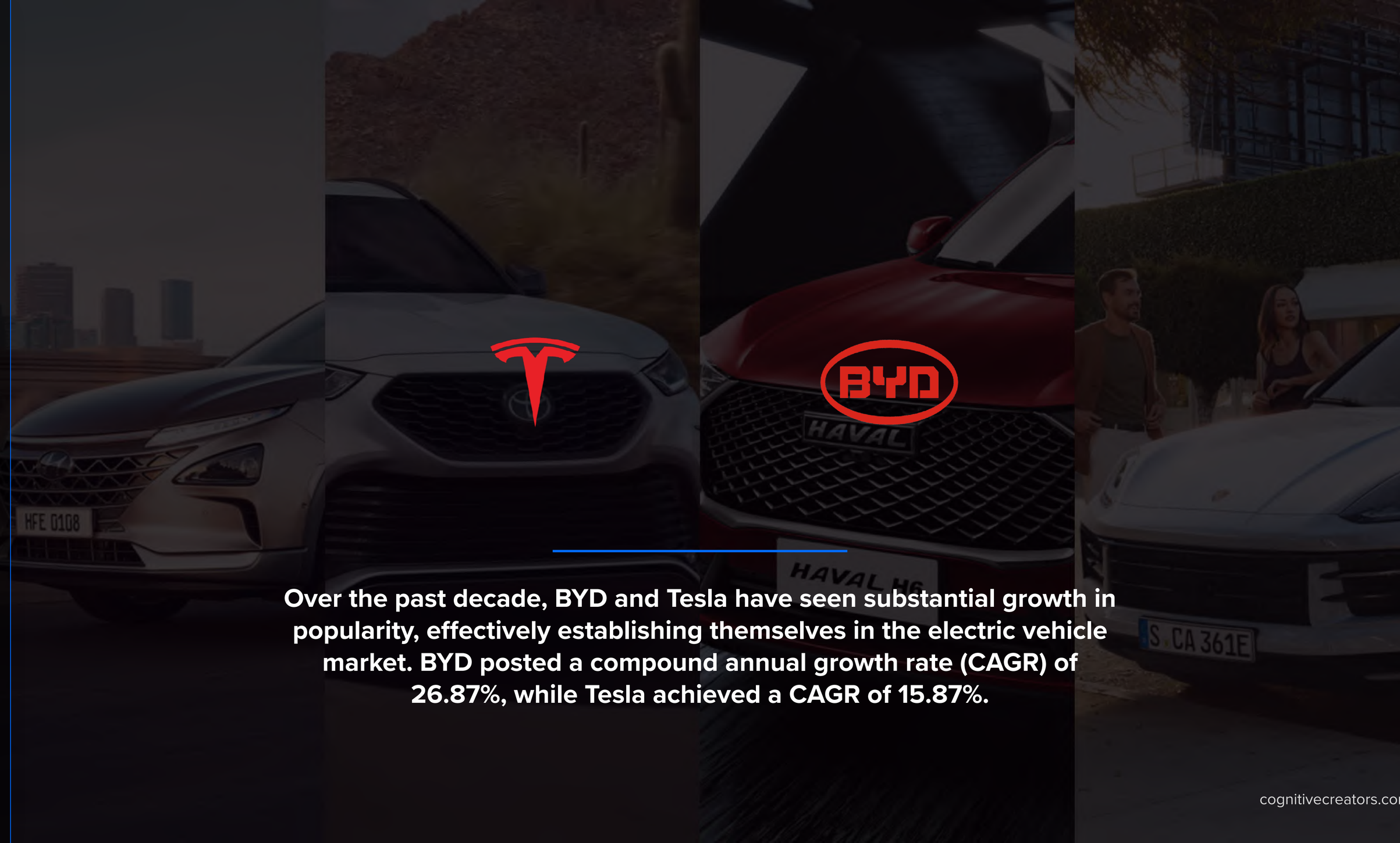
Data values that have the highest score in the listed KPIs



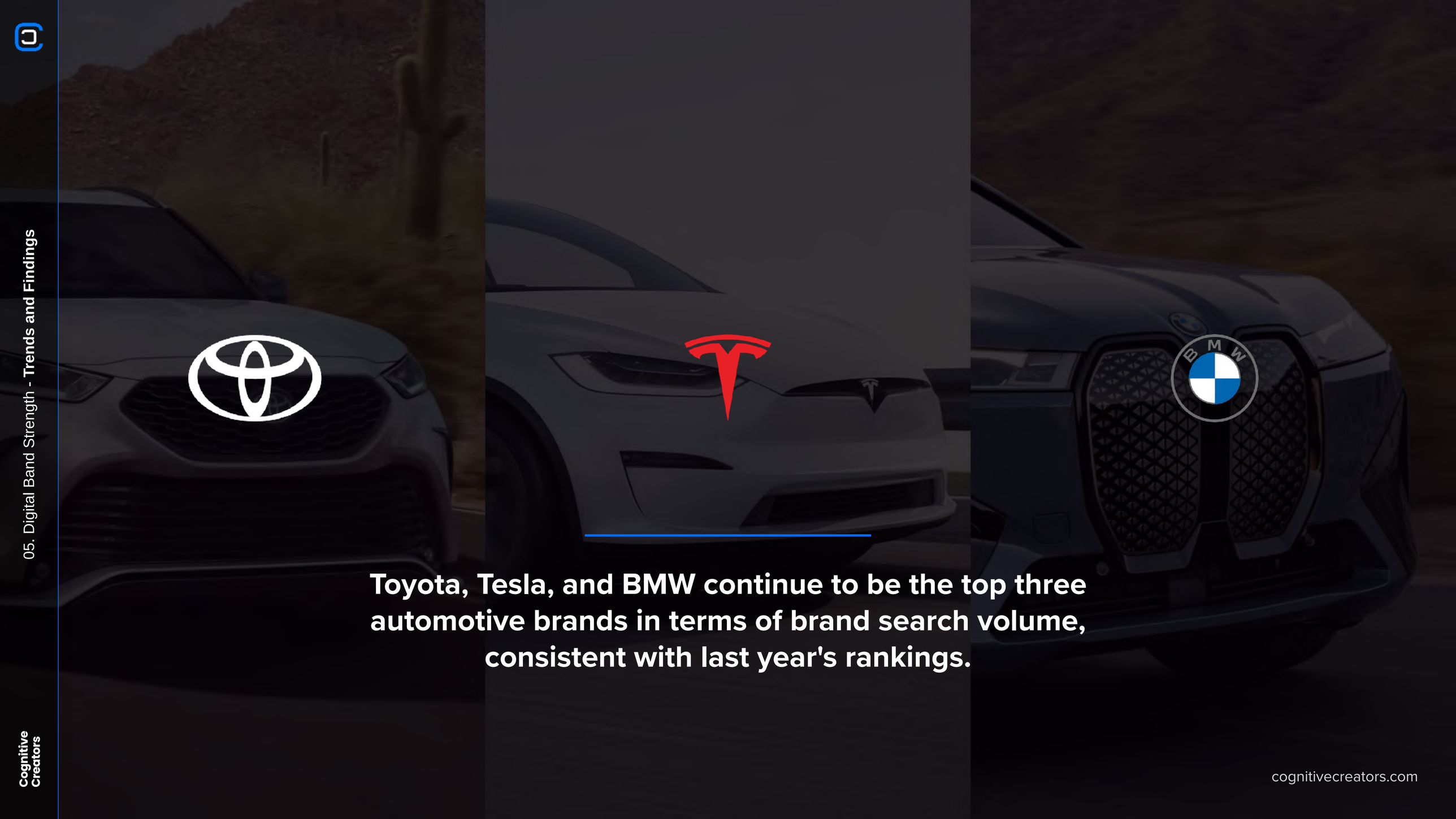
According to Google Trends data on digital popularity, Toyota, BMW, Hyundai, and Kia have had the greatest influence on the automotive industry in 2023.



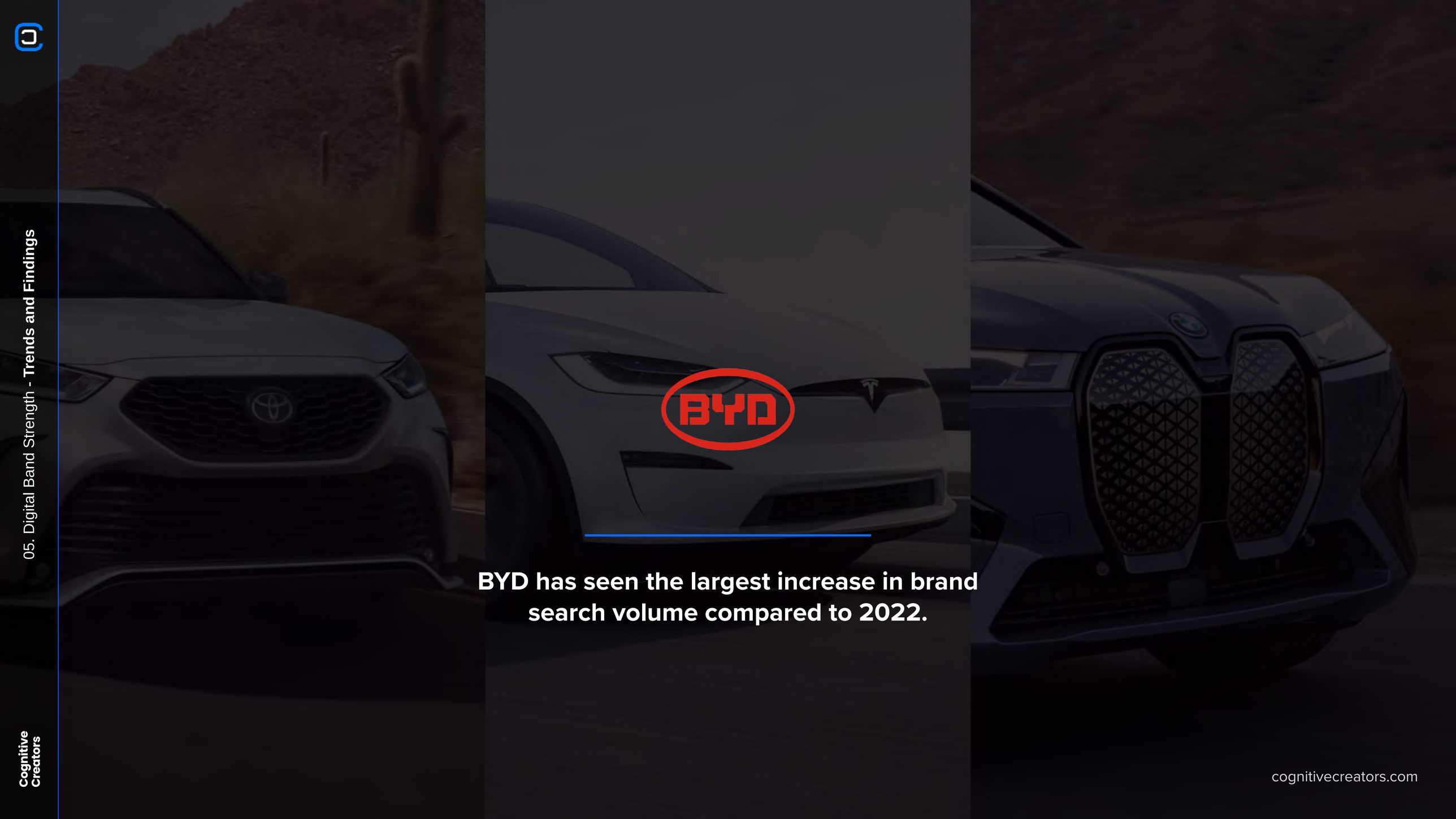
Subaru, Toyota, Lexus, Mercedes-Benz, and BMW have consistently maintained their relative digital popularity above average over the past 20 years.



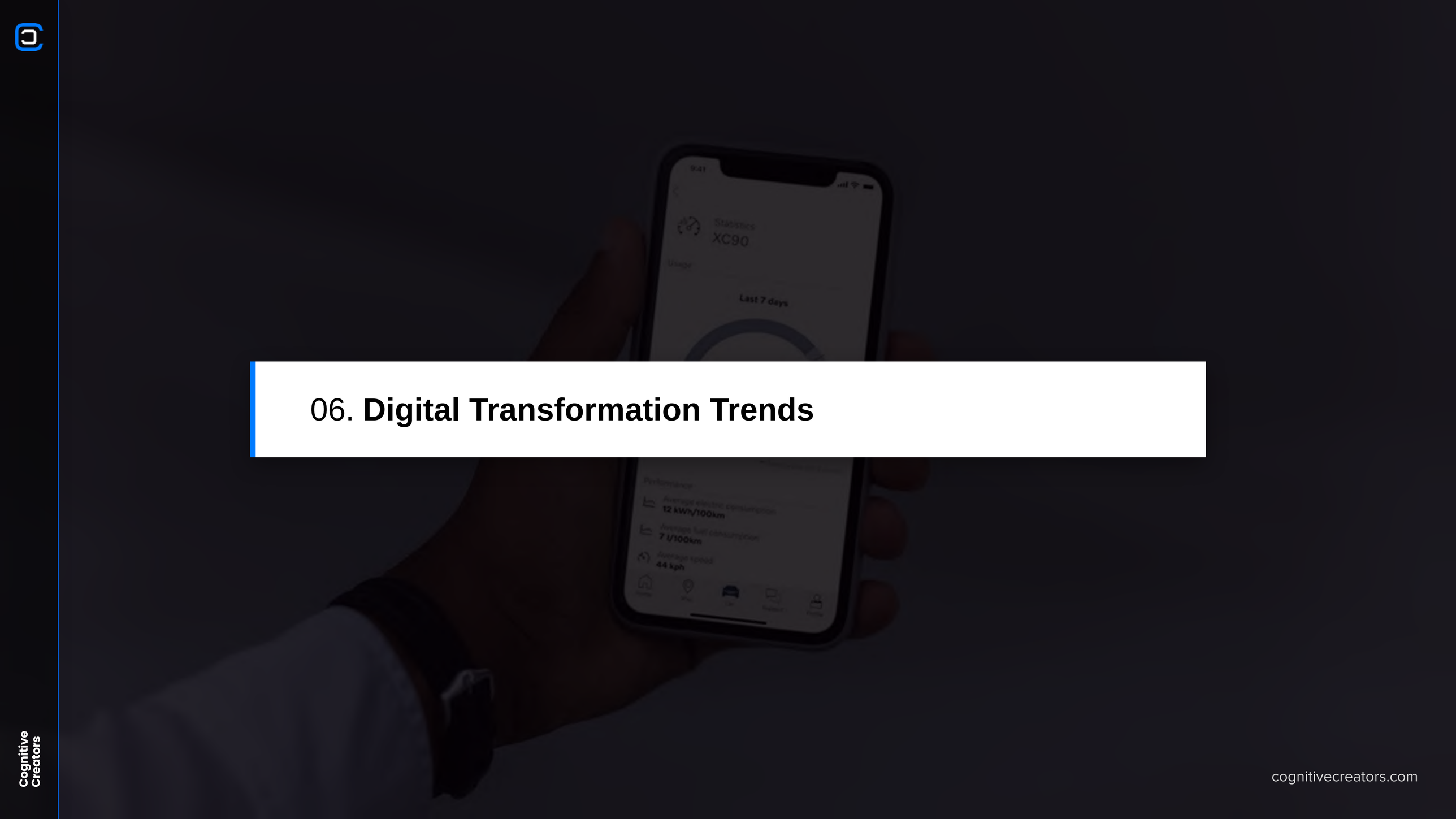
Over the past decade, BYD and Tesla have seen substantial growth in popularity, effectively establishing themselves in the electric vehicle market. BYD posted a compound annual growth rate (CAGR) of 26.87%, while Tesla achieved a CAGR of 15.87%.



Toyota, Tesla, and BMW continue to be the top three automotive brands in terms of brand search volume, consistent with last year's rankings.



BYD has seen the largest increase in brand search volume compared to 2022.



06. **Digital Transformation Trends**

OVERVIEW

All brands have at least one app that enables customers to interact with their vehicles and enhance their driving experience.

Overall, the common theme among these apps is enhancing the vehicle ownership experience through connectivity, remote management, and personalized services.

Each brand tailors its app offerings to reflect its unique market positioning and customer needs, from high-performance driving to everyday vehicle management and brand engagement.

Digital products play a major role in shaping a brand's perception and enhancing user experience.

	NR. OF ANDROID APPS	NR. OF IOS APPS
Audi	6 (5 only for certain users)	3 (2 only for certain users)
BMW	4 (2 only for certain users)	5 (2 only for certain users)
BYD	4	4
Chevrolet	2	2
Ferrari	2	2
Ford	9 (5 only for certain users)	9 (5 only for certain users)
GMC	2	2
Honda	10 (4 only for certain users)	10 (4 only for certain users)
Hyundai	4 (1 only for certain users)	4 (1 only for certain users)
Kia	8 (1 only for certain users)	7 (1 only for certain users)
Lexus	7 (2 only for certain users)	7 (2 only for certain users)
Mercedes Benz	12 (4 only for certain users)	13 (4 only for certain users)
Nissan	5	5
Porsche	6 (1 only for certain users)	8 (1 only for certain users)
Renault	5	4
Subaru	2	2
Tesla	3 (2 only for certain users)	3 (2 only for certain users)
Toyota	10 (3 only for certain users)	10 (3 only for certain users)
Volkswagen	8 (1 only for certain users)	8 (1 only for certain users)
Volvo	10 (1 only for certain users)	6

OVERVIEW

Volkswagen AG tops the list for R&D spending.

BYD Co grew by 42,04% in sales compared to last year, also spending more on on research and development by 112,15% compared to last year.

Tesla Inc and Kia Corp has also increased their spending on R&D by 29,07% and 19,62% respectively.

Audi AG, Honda Motor Co and Nissan Motor Co has decreased their spending on research and development compared to last year.

On average R&D spending grew by 11,97%, or 9 billion dollars based on the 19 companies analysed.

	R&D SPENDING 2023	TOTAL REVENUE CHANGE YEAR ON YEAR, 2022-2023	TOTAL SPENDING CHANGE YEAR ON YEAR, 2022-2023	R&D SPENDING CHANGE YEAR ON YEAR, 2022-2023
Audi AG	1.386.438.740 US$	13,10%	8,05%	-68,01%
BMW AG	8.088.990.110 US$	9,04%	6,68%	13,8%
BYD Co Ltd-H	5.454.174.698 US$	42,04%	40,83%	112,15%
Ferrari NV	946.698.468 US$	17,23%	4,77%	13,67%
Ford Motor	8.200.000.000 US$	11,47%	13,59%	5,13%
General Motor Company*	9.900.000.000 US$	9,64%	12,08%	11,24%
Honda Motor Co Ltd	5.582.226.217 US$	16,18%	0,28%	-4,78%
Hyundai Motor	1.557.208.119 US$	14,13%	5,54%	16,52%
Kia Corp	1.082.435.791 US$	15,31%	11,18%	19,62%
Toyota Motor Corp	8.803.138.533 US$	18,40%	1,95%	5,14%
Mercedes Benz Group AG	6.669.401.900 US$	2,13%	2,30%	11,21%
Nissan Motor Co	3.269.677.903 US$	25,78%	5,05%	-9,32%
Dr Ing hc F Porsche AG	1.832.387.840 US$	7,69%	7,80%	15,36%
Renault SA	2.294.766.080 US$	12,90%	18,06%	7,99%
Subaru Corp	716.269.840 US$	37,53%	32,17%	10,44%
Tesla Inc	3.969.000.000 US$	18,80%	29,68%	29,07%
Toyota Motor Corp	8.805.354.566 US$	18,40%	1,98%	5,17%
Volkswagen AG	16.949.323.760 US$	15,42%	24,47%	18,29%
Volvo, AB ser. B	2.542.345.997 US$	16,75%	8,16%	15,47%

Source: Investing.com

Chevrolet is a brand under the General Motors Company.

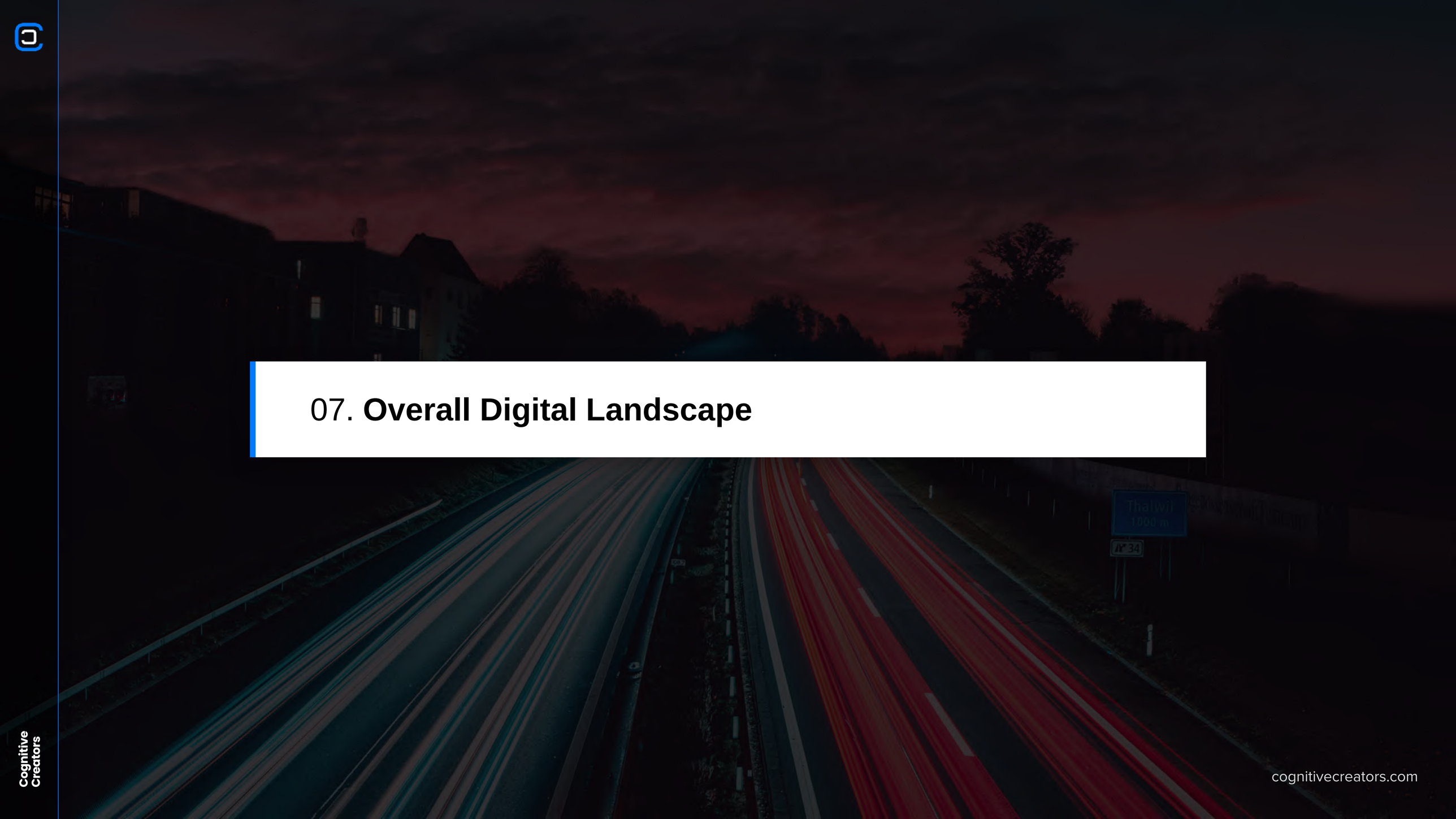
Brands with the best performance based on the listed KPIs

Data values that have the highest score in the listed KPIs

Data values that are close to the highest score in the listed KPIs

Research and development spending in the automotive sector, as measured by the 20 automotive brands ranked by brand value, increased by 11.97%, totaling $9 billion.

In the automotive industry, BYD Co Ltd-H, Tesla Inc., and Kia Corp. have made the most significant increases in R&D spending compared to last year, reflecting their commitment to innovation and competitive positioning.



07. **Overall Digital Landscape**

Ranking biases

To understand the competitive environment of the brand, a detailed analysis of the core competitors is beneficial. We have identified the relevant digital indicators and variables that best represent the success of digital brand development activity.

Based on different variables, we built a weighted scoring model that helped to define the automotive brands' current digital status, discover the digital growth potentials, understand in which area the automotive brand is best-in-class and identify the missing capabilities compared to the competition.

RANKING METHODOLOGY

The core indicators of the ranking system contains five categories to determine the brand’s relevancy compared to their competitors:

Organic Penetration

Organic penetration contains relevant digital indicators that best represent the success of brand development activity and how visible the brand can be to the audience: the number of organic keywords, organic search traffic and the number of backlinks. Therefore it has one of the most significant weights in the ranking equation.

Webpage Performance

Webpage performance score contains the Google benchmark scores (Desktop and Mobile performance score), the Pagespeed Insight scores, an overall SEO performance score and the authority score of the brand’s websites.

Brand Digital Popularity

Brand digital popularity indicates how often people search for a brand in the SERP*, how popular the brand is in digital, the level of brand share in the market and how much the digital interest is growing in their brands.

Social Media Popularity

Social media presence is a good indicator of how broad the brand's audience is, how active they are on different social media sites, and how much their audience engage with the brand's content.

Digital Transformation Trends

Provides insights into industry trends, benchmarking against market players and identifying new opportunities

*Search Engine Results Page (SERP) is the page that a search engine returns after a user submits a search query. In addition to organic search results, it includes paid search and pay-per-click (PPC) ads.

RANKING METHODOLOGY

The core indicators of the ranking system contains five categories to determine the brand's relevancy compared to their competitors:

Organic performance

represents the organic penetration of the brand (number of organic keywords and search traffic from organic channel)

Webpage performance

contains Google benchmarks and the website overall performance in terms of User experience

Digital brand strength

represents the search volume and digital popularity of the brand

Social media presence

indicates the social media penetration, the size of the audience that the brand can engage with, the engagement rate on different social media platforms

Digital Transformation Trends

number of applications, investment on research and development

- **Automotive brands with high brand value tend to enjoy greater digital popularity, which is evident in their organic presence, social media followers, and digital search metrics.**
- **The transition from Haval and Land Rover in last year's brand list to Kia and GMC highlights the emergence of these two newcomers as strong contenders in the brand analysis, with Kia proving to be the more established of the two in terms of organic penetration, webpage performance, and digital popularity.**
- **The rankings highlight notable shifts in brand positioning, driven by 1) minor adjustments to the ranking methodology, 2) increased focus by certain brands on enhancing their digital presence, and 3) broader industry-wide changes.**

Organic Penetration	Webpage Performance	Brand Digital Popularity	Social Media Presence	Digital Transformation
1 Ford	1 Porsche	1 Toyota	1 Mercedes-Benz	1 Honda
2 Tesla	2 Mercedes-Benz	2 Hyundai	2 Ferrari	2 Volkswagen
3 Kia	3 BMW	3 BMW	3 Porsche	3 Ford
4 Porsche	4 Renault	4 Kia	4 BMW	4 Chevrolet
5 Honda	5 Kia	5 Mercedes-Benz	5 Tesla	5 Mercedes-Benz
6 Chevrolet	6 Tesla	6 Tesla	6 Volkswagen	6 Toyota
7 Hyundai	7 BYD	7 Porsche	7 Toyota	7 BMW
8 Volvo	8 Audi	8 Lexus	8 Nissan	8 Volvo
9 Ferrari	9 Volvo	9 Honda	9 Ford	9 GMC
10 Subaru	10 Nissan	10 GMC	10 Renault	10 BYD
11 GMC	11 Volkswagen	11 Ferrari	11 Chevrolet	11 Porsche
12 Lexus	12 Hyundai	12 Audi	12 Hyundai	12 Lexus
13 Volkswagen	13 Toyota	13 Nissan	13 Honda	13 Nissan
14 Mercedes-Benz	14 Chevrolet	14 Subaru	14 Lexus	14 Ferrari
15 BMW	15 Ferrari	15 Volkswagen	15 Subaru	15 Renault
16 Toyota	16 GMC	16 Chevrolet	16 GMC	16 Tesla
17 BYD	17 Honda	17 Volvo	17 Audi	17 Kia
18 Nissan	18 Ford	18 Renault	18 Kia	18 Audi
19 Renault	19 Subaru	19 Ford	19 Volvo	19 Hyundai
20 Audi	20 Lexus	20 BYD	20 BYD	20 Subaru

Organic Penetration and Position Changes Since the 2023 Ranking

1	Ford	0
2	Tesla	0
3	Kia	NEW
4	Porsche	+1
5	Honda	-1
6	Chevrolet	-3
7	Hyundai	-1
8	Volvo	-1
9	Ferrari	0
10	Subaru	0
11	GMC	NEW
12	Lexus	-1
13	Volkswagen	-1
14	Mercedes-Benz	-6
15	BMW	-2
16	Toyota	-2
17	BYD	+2
18	Nissan	-3
19	Renault	-1
20	Audi	-3

Webpage Performance and Position Changes Since the 2023 Ranking

1	Porsche	+4
2	Mercedes-Benz	+7
3	BMW	-2
4	Renault	-2
5	Kia	NEW
6	Tesla	0
7	BYD	-3
8	Audi	0
9	Volvo	-6
10	Nissan	-3
11	Volkswagen	+1
12	Hyundai	+2
13	Toyota	-3
14	Chevrolet	+2
15	Ferrari	+5
16	GMC	NEW
17	Honda	-4
18	Ford	-1
19	Subaru	-1
20	Lexus	-1

Brand Digital Popularity and Position Changes Since the 2023 Ranking

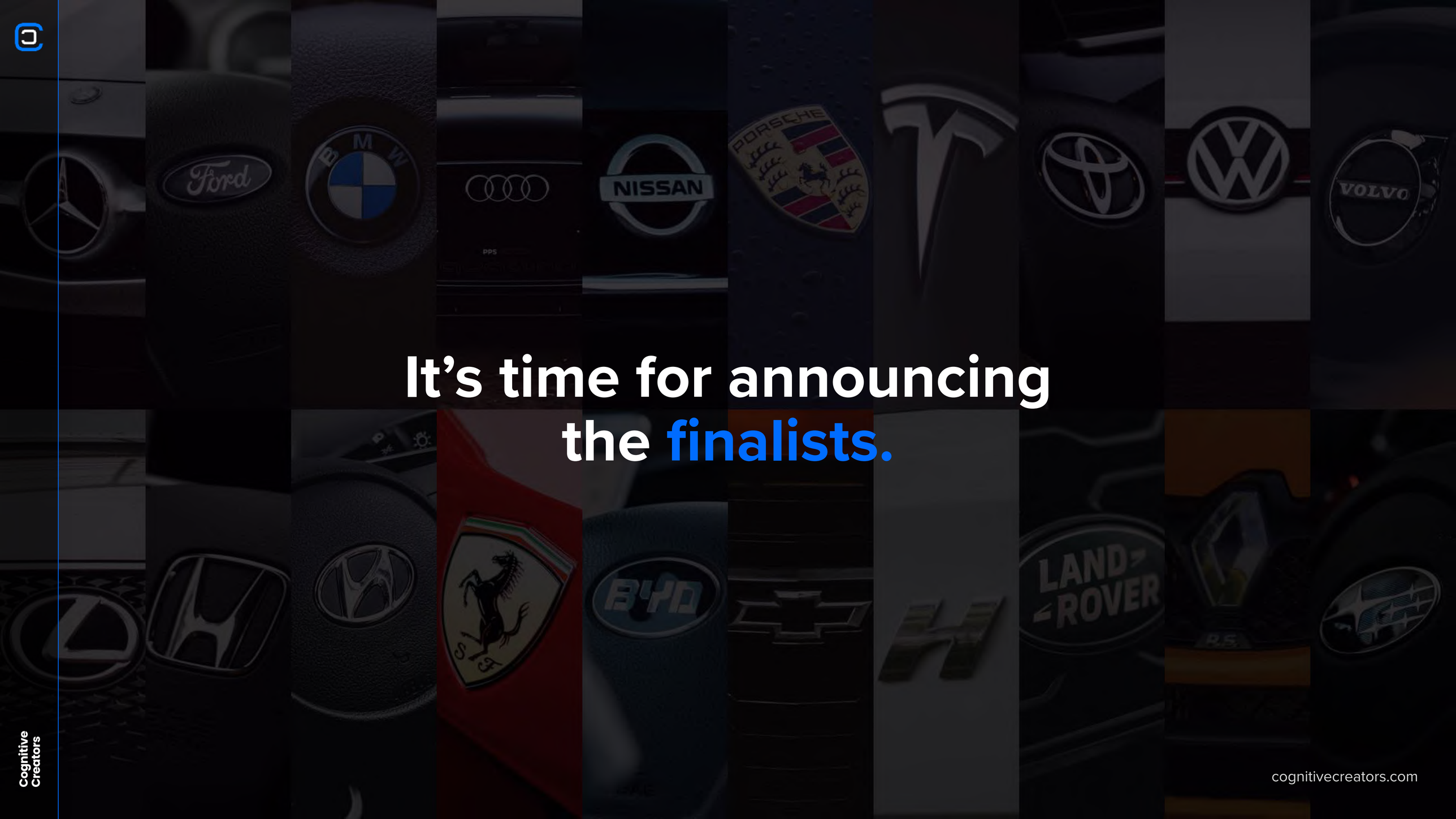
1	Toyota	0
2	Hyundai	0
3	BMW	0
4	Kia	NEW
5	Mercedes-Benz	+10
6	Tesla	+6
7	Porsche	0
8	Lexus	+2
9	Honda	-1
10	GMC	NEW
11	Ferrari	+8
12	Audi	-3
13	Nissan	-7
14	Subaru	0
15	Volkswagen	-11
16	Chevrolet	-3
17	Volvo	+1
18	Renault	-1
19	Ford	-14
20	BYD	-4

Social Media Presence and Position Changes Since the 2023 Ranking

1	Mercedes-Benz	0
2	Ferrari	0
3	Porsche	0
4	BMW	0
5	Tesla	0
6	Volkswagen	+1
7	Toyota	+1
8	Nissan	+4
9	Ford	-3
10	Renault	+5
11	Chevrolet	-2
12	Hyundai	+1
13	Honda	-2
14	Lexus	+3
15	Subaru	-1
16	GMC	NEW
17	Audi	-1
18	Kia	NEW
19	Volvo	-1
20	BYD	0

Digital Transformation and Position Changes Since the 2023 Ranking

1	Honda	+11
2	Volkswagen	-1
3	Ford	+4
4	Chevrolet	+4
5	Mercedes-Benz	+8
6	Toyota	0
7	BMW	-3
8	Volvo	-3
9	GMC	NEW
10	BYD	+6
11	Porsche	-1
12	Lexus	+3
13	Nissan	-10
14	Ferrari	-5
15	Renault	-1
16	Tesla	-5
17	Kia	NEW
18	Audi	-16
19	Hyundai	0
20	Subaru	0



It’s time for announcing the finalists.

Cognitive Creators

cognitivecreators.com

Porsche emerges as the overall winner based on the aggregated metrics of its digital performance.

Porsche and Tesla have surpassed the former champion, BMW, in the rankings. Mercedes-Benz has climbed to third place, moving up from sixth.

Overall Rankings in 2024

1		Porsche
2		Tesla
3		Mercedes-Benz
4		BMW
5		Kia
6		Hyundai
7		Toyota
8		Ford
9		Ferrari
10		Honda
11		Volkswagen
12		Chevrolet
13		Volvo
14		GMC
15		Nissan
16		Lexus
17		Renault
18		Subaru
19		Audi
20		BYD

Overall Rankings and Position Changes Since 2023

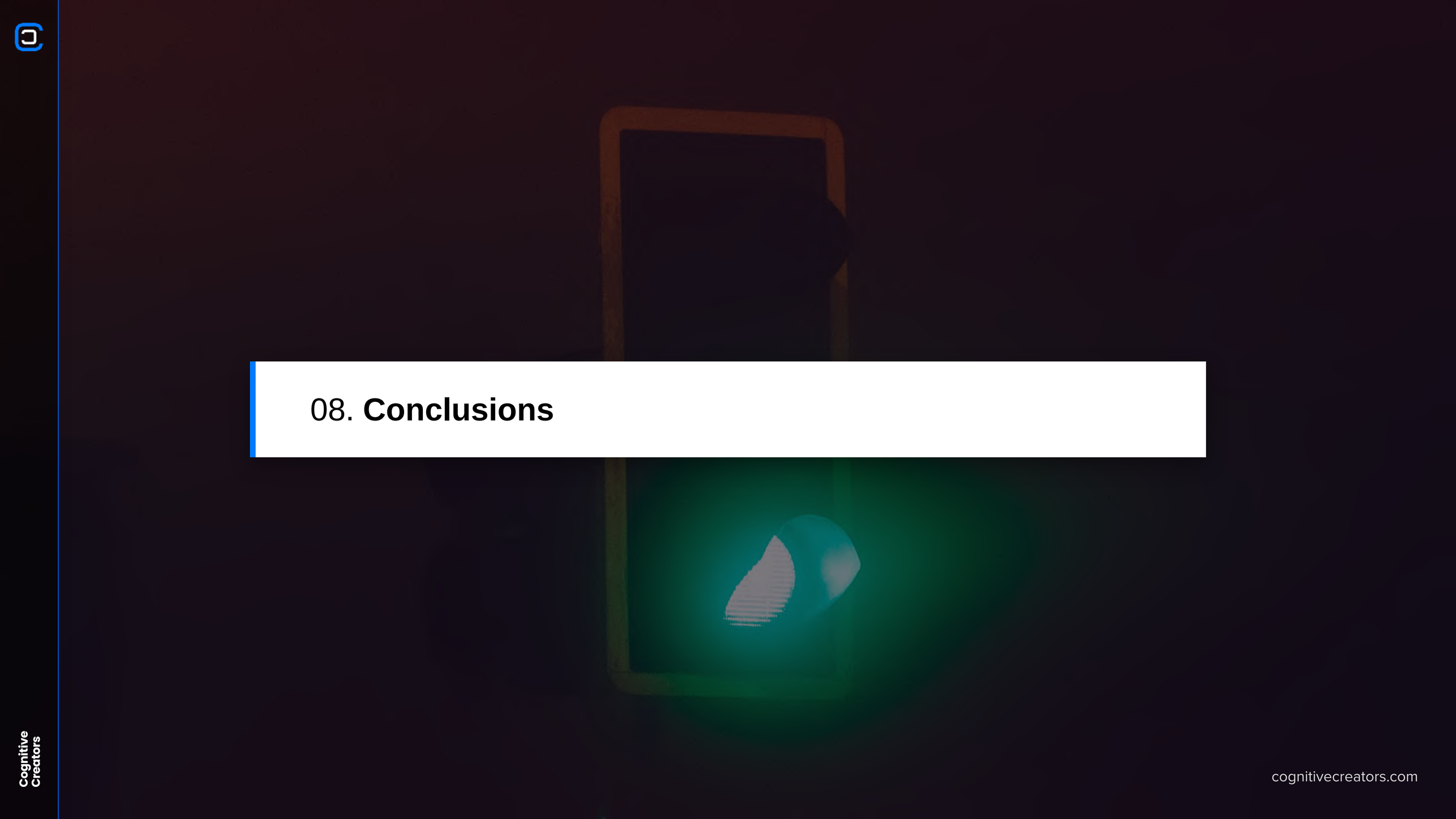
1	Porsche	+1
2	Tesla	+1
3	Mercedes-Benz	+3
4	BMW	-3
5	Kia	NEW
6	Hyundai	+2
7	Toyota	-2
8	Ford	-4
9	Ferrari	+5
10	Honda	-1
11	Volkswagen	-4
12	Chevrolet	-2
13	Volvo	-1
14	GMC	NEW
15	Nissan	-4
16	Lexus	0
17	Renault	-2
18	Subaru	-1
19	Audi	-6
20	BYD	-1

Luxury brands such as BMW, Mercedes-Benz, Ferrari, and Porsche lead the rankings in both website performance and social media presence.

Heritage brands such as Ford, Toyota, and Honda excelled in organic penetration, brand digital popularity, and the digitalization factor.

The top three positions for organic penetration, digital brand popularity, and social media presence have remained largely consistent with last year. In the 2024 analysis of the top 20 automotive brands, Kia has emerged as a new contender, securing third place in the organic penetration rankings. Porsche and Mercedes-Benz have climbed into the top three for website performance, while Mercedes-Benz and Tesla have shown significant improvements in digital brand strength.

Mercedes-Benz has moved up to third place, while Porsche and Tesla have maintained their positions in the top three, as they did last year. BMW, on the other hand, has dropped from the number one spot to fourth place.



08. **Conclusions**

The automotive sales model is about to change and resemble the traditional retail model more. Online sales will become more prevalent in the industry and OEMs will have to adapt to significant changes in their customers' buying habits in the the coming years.

Digital products will play a crucial role in each automotive brand's perception and experience, because with the rise of autonomous technologies, cars will be perceived more as tech products and entertainment centres than merely functional transportation methods. R&D spending in the automotive sector grows, with BYD, Tesla, and Kia increasing their investments the most. This indicates a strong focus on innovation and adapting to new technologies in the industry.

From 2017 to 2023, non-electric light vehicle sales initially plummeted but recovered in 2023, while electric and hybrid vehicle sales have been steadily increasing, bolstered by new incentives and regulations. The global automotive market in 2023 was led by Toyota, with China dominating both ICE and EV sectors, and EV adoption continues to rise, supported by the expanding charging infrastructure.

Luxury brands like Mercedes and BMW have the largest social media follower bases, followed by Ferrari with the strongest video platform presence. TikTok has become a key platform for automotive engagement, surpassing YouTube in followers, while Instagram saw the highest growth in followers compared to last year.

BYD saw the most growth in organic search traffic and authority score, while Toyota had the largest increase in visits. Most automotive brands must enhance their mobile website performance, even with the increase in SEO scores.

Toyota, BMW, Hyundai, and Kia had the biggest impact in 2023, with BYD and Tesla showing significant long-term growth in popularity due to their electric vehicles. Toyota, Tesla, and BMW remain the top brands in search volume, with BYD showing the most growth compared to 2022.

This white paper is meant to exemplify the core insights that a thorough DDD can deliver to any organisation based on validated and publicly available data.

For a customised and genuinely accountable analysis, we regularly work with private/confidential intel that the organisation entrusts us with.

Key takeaways

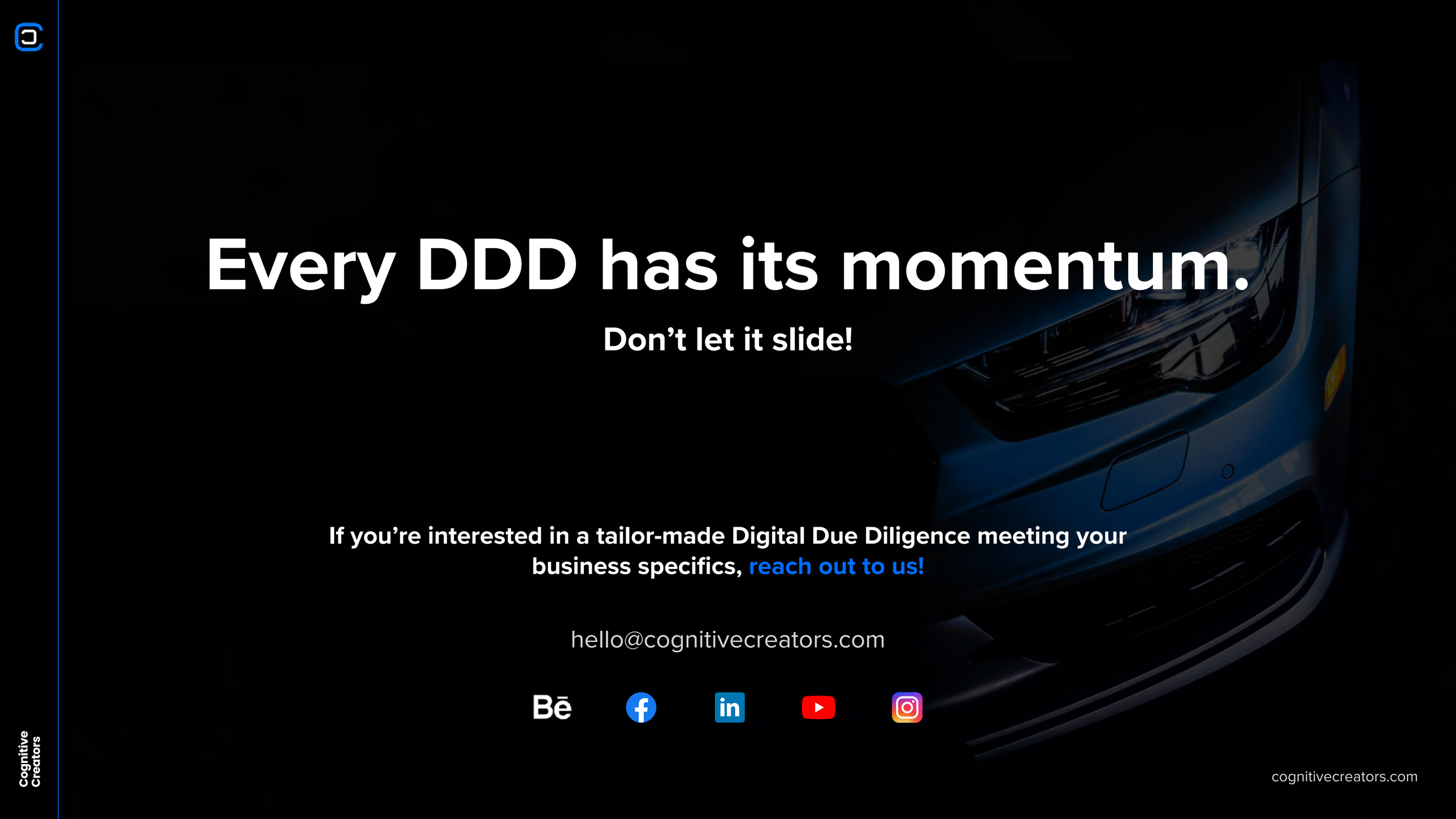
Given the rapid shifts in markets, the competition, and the technology, it is more difficult to advance in the digital environment. In order to win, the brand needs to understand where it stands with its current capabilities and limitations, and build the strategy upon it.

Looking across the competition's environment presents valuable opportunities. Although seeing other brands thrive in digital might indicate directions to follow, but without a thorough understanding of their activities, it can lead to pitfalls. DDD shows us strategic directions that have the most potential for digital growth.

Today's digital brand value is not something to be underestimated. Its impact on the overall brand value can make a difference among the competition.

Every DDD has its momentum.

Don’t let it slide!



If you’re interested in a tailor-made Digital Due Diligence meeting your business specifics, reach out to us!

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