Consumer Trends Report: Germany

Using online data to uncover political and commercial trends in Germany
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About Braingraph

In today’s Digital Economy, understanding data is the key to unlocking growth, increasing efficiency, and driving effectiveness.

At Braingraph we are using behavioural science, big data and cutting edge technology to put that key into your hands. The following report about German market trends is testament to that approach and proof of our commitment to create value by combining data, science and technology in the most appropriate and meaningful way.

Through their partnership with Crimson Hexagon, Braingraph helps brands and customers gain a keener insight into their customers and the markets they operate within.
About Crimson Hexagon

Crimson Hexagon helps global brands better understand their consumers. With instant access to the world’s largest volume of unstructured text and images across social, online public, and enterprise-held data sources, Crimson Hexagon’s AI-powered consumer insights platform allows clients to analyze audiences, track brand perception and campaign performance, and even detect competitive and market trends. Our clients include Anheuser-Busch InBev, Adidas, General Mills, Paramount Pictures, and Twitter.
Methodology
Our approach

**Digital Data**
Digital data sources like social, search, stats, traffic data

**Behavioral Insight**
Frameworks based on behavioral science and empirical evidence

**Technology**
Using advanced analysis techniques including machine learning, AI and predictive analysis

**Value**
Increased marketing effectiveness, reduced churn, improved customer engagement, increased customer lifetime value
Data

• This report relies on search data (via Google trends), social data (via Crimson Hexagon), statistical data and trusted news source (statistical and news sources referenced where applicable). Social data is composed of mentions on public social media platforms (Twitter, Forums, Blogs, YouTube, Reddit, Instagram, public Facebook pages).

• None of the data can be taken as absolute, which is why we triangulated and cross-referenced all datasets wherever possible. All data points should be questioned and interpreted in context and constructive feedback is always appreciated.

Timeline

• Social data used in this report reaches back as far as 2009, with more remote data becoming less dense, rendering more recent results generally more reliable

• Search trend data used in this report stretches back as far the last 5 years (2013-2018)

Limitations

• Although the highest standards of cross-validation and contextual verification have been applied, this report should not be used as the sole basis for decision making but is aimed to be an additional source of insight to be used alongside other robust research

• Despite the highest levels of accuracy applied we do not guarantee this report is free of any errors and reject any liability for decisions made on the basis of this report
Research Results: Social and Political Trends

- **Elections**: The most recent German election and the current political situation
- **Immigration**: The big controversial topic in Germany, driving political change and creating new political forces (AfD)
- **Germany and the European Union**: Concerns about stability in Europe and its position with regard to Brexit
- **Germany and the world**: Key topics in German conversations about international politics
The most recent German federal elections

Angela Merkel “won” the last German election on 24th September 2017 with her party (CDU/CSU) securing 33% of the vote. However, she lost more than 8 percentage points from her total in the previous election.

The Social Democratic Party (SPD) also suffered, achieving its worst result since the second World War, with just 20%. A newcomer, AfD, became the third strongest party in the Bundestag with 12.6%, whilst the Free Democrats (FDP) returned with 10.7% after losing all their seats in the 2013 election.

The other parties to achieve representation were the Left and the Greens, who each won close to 9%.
Rising frustration

The sentiment around Angela Merkel has been declining over time, with peaks of negativity in the run up to the parliamentary elections ("Bundestagswahl") in 2013 and 2017 as well as her involvement in the nomination of Christian Wulff as President of Germany, and her decision to open German borders to all Syrian refugees in 2016.
Increasing volume but declining net sentiment

Angela Merkel has been increasingly discussed in German public social media with key spikes in 2013 (German federal parliamentary elections) and 2016 (fall-out of the refugee crisis).

Merkel's net sentiment shows a clear downward trend with the scandal around German president Christian Wulff and the refugee crisis marking key negative peaks in Merkel's net sentiment.
Immigration: a controversial topic

Immigration: Germany’s biggest issue

Immigration is currently the biggest political topic in Germany, followed by other large scale social issues like social injustice, pensions, education and problems of the labour market.

Source: Infratest
Immigration: The “silent” issue with relevance especially in Eastern Germany

Being the biggest political topic in Germany at the moment, it is unsurprising that immigration is also strongly talked about.

Immigration is currently the most important political topic in Germany. However, the online conversation about the topic is not evenly distributed throughout the country. Surprisingly, the political movement on the right is present predominantly in areas with lower levels of online conversations about the topic.

Immigration related conversations: darker areas represent higher levels of conversations per capita.\(^1\)
Source: Crimson Hexagon, 2015-2018

GDP per Capita in Germany. Poorer areas mapped in lighter colours.\(^2\)
Source: Statistisches Bundesamt

Percentage of people voting for AfD (“Alternative for Germany”), a right-wing to far-right political party. Darker colour = higher percentage.\(^3\)
Source: Morgenpost.de
Outspoken xenophobia

The map (right) reveals per capita frequency of xenophobic conversations. Berlin, Cologne and Hamburg lead the pack, but it is worth noting that xenophobia is mostly an implicit behaviour.
Germany and the European Union

Is Germany's relationship with the rest of Europe changing?

EU-related conversations in Germany show that, although still a big topic, Brexit-related conversations are slowly declining whilst the relationship of a “European Germany” to the US is growing into a real and controversial topic. Additional European topics of relevance include refugees (Flüchtlinge), Turkey (Türkei), Greece (Griechenland), and Russia (Russland), but only the latter seems to have the potential to grow into a substantial topic of note in 2018.
Germany & the world

While Brexit conversations in Germany are cooling down, the US conversation is just heating up, especially in regard to Donald Trump. Other international political topics — Russia/Putin, Britain/Brexit, Turkey/Erdogan and even Syria — don’t approach the volume of conversation dedicated to the US and #Trump, who has even become a part of mainstream media and German advertising.
Research Results: Transportation

- The "Diesel-Skandal": Political and commercial consequences
- Alternative transportation trends: Self-driving cars, e-mobility, car-sharing, (electric) bikes
- The future of automobiles in Germany: Which type of vehicles will prevail?
The diesel scandal

#Dieselgate was a major scandal that generated more than 65,000 conversations on German public social media between October 2015 and the publication date of this report. The conversation is highly critical with a net sentiment of -59% (over 70% of mentions are negatively sentimented).

The legal and financial consequences of the scandal are vast and varied, affecting up to 13 of the 15 million Diesel cars in Germany. The scandal mainly affected VW, Porsche and Audi, ranging from driving bans to fines, including an estimated 24.4 billion Euros in costs for Volkswagen alone.

Source: infratest
#Dieselgate: The fall-out

Volkswagen’s stock has largely recovered, but not completely, from the scandal. Share prices originally plummeted over 60%, but now rest at a 20% loss compared to the pre-scandal high in 2015. However, diesel car sales in Germany have declined 21% between Q1 2017 and Q1 2018. Car-buying conversations have also shown a relative decrease in purchase intent for VW compared to rival brands, Ford and Fiat.

Purchase Intent VW vs Competitors (in German Social Media)

Change in new car registrations in Germany by fuel type January to March

- Petrol: +20.3%
- Diesel: -21.3%
- Liquid Gas: +18.5%
- Natural Gas: +433.2%
- Hybrid: +64.1%
- Plug-In: +60.5%
- Electro: +79.9%


Source: Bloomberg/NZZ
#Dieselgate: Big picture

Looking at this from a “Europe Only” Perspective, the scandal doesn’t seem to have impacted Volkswagen that much. With only minor YoY sales changes for 2017 vs. 2016, the brand remains the biggest car manufacturer in Europe with slightly over 1.7 million cars sold in Europe alone (source: ACEA).

The only visible “hiccup” in Volkswagen’s car sales was in March 2017 when they temporarily lost the number one selling position to Ford (Fiesta becoming the most sold European car instead of VW Golf), but VW regained that position for the whole year 2017 with 483,105 cars sold (only 2% less than 2016).
Alternative Transport Trends

Going electric

It’s not just electric cars — electric bikes are on the rise in Germany too. E-bikes are showing double the amount of search demand as electric cars. Concerns about the infrastructure needed to support electric cars don’t seem to extend to e-bikes.

German government announces 4,000€ buyer’s premium
The rise of the e-bike

The graphic to the right reinforces that e-Bikes are an increasingly popular transportation trends in Germany. Despite the rapid growth, though, e-Bikes still only account for half the conversation volume dedicated to electric cars.
E-bike beats e-car in net sentiment and growth

German social media conversations about e-bikes show a stronger net growth (2010-2018) compared to conversations about electric cars. E-bikes also beat electric cars in net sentiment by 8 percentage points. The only caveat here is that e-bike conversations seem to be highly seasonal, spiking the most in the warmer summer months.
Key adoption issues around e-bikes and electric cars in Germany

Mobility restrictions for charging electric vehicles still dominate the e-vehicle conversation. Both discussions focus on battery limitations — too weak (for e-bikes) or too small a range (“reichweite”). Other common criticisms focus on e-bikes’ perception as being ridiculous (“lacherlich”) while electric cars are often called out for their high price (“teuer”).
The future of the auto industry

The future is hybrid

Hybrid technology (using more than one form of onboard energy) could have the potential to become the next engine standard in Germany and elsewhere. While still limiting the negative impact on the environment, hybrid engines are also less reliant on electric charging infrastructure.
Fuel cell hybrid

Fuel cell technology is another big topic in the conversation about hybrid vehicles. Fuel Cell Vehicles (FCVs) are electric vehicles that use a fuel cell instead of — or in addition to — a battery to power an electric motor, as a completely clean form of transportation.
Which brands lead in future tech?

German car brands aren’t considered industry leaders in conversations about the future of transport.

The most mentioned brand in this context is Toyota, whose Prius model is discussed on German social media as a model of sustainable transportation.

The first German brand considered a leader is Volkswagen, with less than half (1,328 vs. 2,877) of the conversation volume mentioning the future of transport. BMW follows close behind with 1,303 conversations.
Toyota Prius conversation rising in Germany

Since its debut, Toyota’s Prius has been considered one of the most futuristic and efficient vehicles, thanks to its reduced noise emissions and energy-efficient technology. As a result, it has become an increasingly prevalent topic of conversation among German car experts, especially on forums.

Sample conversations from German public social media (Forums, 2016-2018)

**So wenig Sprit schlucken Stromautos**
...praxisnahen Erläuterungen. Ich stimme Dir in allen Punkten zu, und halte den zitierten Punkt der "lokalen Elmissionsfreiheit" für den wichtigsten. Ich bin zwar noch kein reines E-Auto gefahren, aber ein Hybridfahrzeuge (den Prius+) und war sofort von der Ruhe begeistert, die in diesem Auto herrscht. Vor allem im Stadtverkehr: Da wo mein D-CAT an der Ampel vor sich hinnagelt, herrscht im...

**Post on motortalk.de**
...Prius IV läuft, läuft er mit 40% Wirkungsgrad. Sobald der Benziner im Golf GTE läuft, läuft er mit Glück bei 33.5%. Und deswegen wird auch andersrum ein Schuh draus: Der Plug-in-Hybrid spart im Stadtverkehr und bei niedrigen Geschwindigkeiten, in denen der Benziner nicht laufn muss und die Akkuladung aushält. Auf der BAB und nach


Research Results: Technology

- **Digital privacy and data protection**: How Germany is reacting to recent data scandals
- **Generation mobile**: How the mobile phone is changing German consumer and shopping behaviour
- **Smart homes and IoT**: How Amazon Alexa, Google Home, Nest and others are smarting up German homes
- **Wearables and the future of fitness**: How smartwatches, fitness trackers and other wearables are helping German techies stay active
- **Digital currencies and Blockchain**: How Germans are reacting to the latest developments in digital currencies
Digital privacy

German interest in data protection highest in 15 years

The volume of online conversation about data protection in Germany shows that interest in this topic has never been higher over the last 15 years. While some of this conversation focuses on recent data breaches (like Cambridge Analytica), most of the discussion centers around recent EU-driven regulation changes, like GDPR. When we compare UK search trends to those in Germany, we see that the data-protection topic generally receives about 60% more attention in Germany than the UK.
Data protection is trending on German social media

Data protection is a hot topic in German social media conversations, fuelled primarily by consumer and IT professional debates over privacy related changes to platforms like Facebook and Google as well as new government policies. The peaks in German data protection conversations highlight the history of big data leaks and general privacy policy changes.
Fear of data theft rising among Germans

German “angst” about privacy violations and data breaches stem from a variety of topics, including:

- Data and identity theft
- Violations of personal privacy
- Exposure of sensitive, personal information (such as medical or bank records)
- Breach of financial information
- Intelligence agencies like NSA, BND, MI5 and their habit to infringe on personal freedom
Mobile phone use

Germany has arrived at total mobile penetration

As of the beginning of 2018, there are more mobile phones in Germany than citizens. In fact, Germany now has 135% mobile phone penetration (graphic one), which is interesting considering that the country's general internet penetration is only 91%.

While Germany is a global leader in terms of mobile phone penetration, the country still lags behind worldwide standards of active mobile social media use (graphic 2).

Adapted from chart by We Are Social by Simon Kemp
Early diffusion of mobile phone use in Germany

At this point, German citizens are among the heaviest mobile phone users in the world, according to The World Bank.

The seemingly paradoxical rate of 130 mobile phones per 100 people (in 2009) was likely caused by the duplication of phone subscriptions for both work and private phones.
Exponential mobile data usage in Germany

Mobile data volume is growing at an exponential rate in Germany, with the average user set to surpass 1GB monthly use in 2018, according to data from Statista.

What’s driving this rapid growth? Faster mobile internet connections have fuelled a significant growth in mobile app culture, as well as more widespread usage of image (e.g. Instagram) and video (e.g. Netflix) intensive apps.

Source: Statista
Most downloaded apps in the German market

What are the most downloaded apps in the German market by category?

- **Communication** (e.g. WhatsApp, Facebook Messenger, email, internet browser)
- **Gaming** (Harry Potter, Love Balls, Helix Jump, MMX Hill Dash)
- **Social** (Instagram, Facebook, Snapchat)
- **Entertainment** (YouTube)
- **Tools** (Google Maps, Google Play)

### Top 10 Downloaded Apps Android vs. iOS (April 2018, Germany)

**Android users prioritize communication and social apps**

<table>
<thead>
<tr>
<th>Top 10 Android Apps</th>
<th>Top 10 iPhone Apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Facebook</td>
<td>2. Love Balls</td>
</tr>
<tr>
<td>5. Google Chrome</td>
<td>5. WhatsApp Messenger</td>
</tr>
<tr>
<td>6. YouTube</td>
<td>6. MMX Hill Dash 2- Race Offroad</td>
</tr>
<tr>
<td>7. Instagram</td>
<td>7. Instagram</td>
</tr>
<tr>
<td>8. Facebook Messenger</td>
<td>8. YouTube</td>
</tr>
<tr>
<td>10. WEB.DE Mail</td>
<td>10. Snapchat</td>
</tr>
</tbody>
</table>

Source: [SimilarWeb](https://www.similarweb.com)
Germany lags behind in mCommerce

Not only does the German eCommerce market still lag behind the UK, the German mCommerce (mobile purchasing) market also trails, according to data from ecommercenews.

But, what is causing this gap? There are many factors contributing to this, but one of the major reasons is German risk-averse attitudes toward data security and mobile payments.

Charts adapted from visualizations from ecommercenews.
Batteries improve and streaming goes mainstream

Short battery life (‘akku’) has been a common topic of conversation in Germany for several years, but declining social media conversations about the topic suggest that it has become slightly less of a problem. At the same time, conversations about TV and video streaming have increased, while the app ecosystem has remained a relevant and popular topic.
Home automation

Home automation market is growing

Compared to other markets (specifically US, Japan, and UK) the German IoT market is still underdeveloped. In 2016, less than 10% of German adults owned an IoT device - most likely a wireless speaker. However, the German IoT market is growing, mostly driven by B2C home automation devices.

Among those, Amazon Alexa and Google Home have become catalysts for demand, connecting home automation with a convenient way of controlling connected home systems.

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**Search Interest Over the Past 5 Years in the German Market**

- **Amazon Alexa**: 100%
- **Google Home**: 75%
- **Smart Home**: 50%
- **Expenditure in billions of Euros**: 25%
- **Google Trends Search Interest**

Amazon Alexa launches in Germany Sept 14, 2016

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**IoT Revenue Prediction (2010-2020)**

- **Expenditure in billions of Euros**:
  - 2010: 4b
  - 2012: 6b
  - 2014: 9b
  - 2016: 14b
  - 2018: 25b
  - 2020: 50b

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**IoT Devices Owned by Internet Users in Germany (July 2014)**

- **Wireless speaker**: 9%
- **Fitness tracker**: 4%
- **Smart watch**: 4%
- **Surveillance security system**: 3%
- **Connected car**: 2%
- **Connected home appliance**: 2%
- **Smart lighting system**: 2%
- **Smart thermostat**: 2%

**Source**: eMarketer
Home automation heats up in the winter

Conversations about home automation in Germany seem to follow a seasonal pattern, with peaks shortly before and after the beginning of a new year.

While some of this seasonality is the result of traditional sales patterns, a big part is also due to winter weather, when Germans are more likely to buy, install and talk about home automation technologies.
WiFi speakers dominate home automation

Within the German conversation about home automation technology, smart speakers (like those made by Sonos) are especially dominant. HiFi stereo systems have long been an important part of German households, but now many consumers are swapping them out for more cutting edge wireless versions.

After Sonos, Amazon (Alexa), Devolo (fast wireless systems), Telekom Magenta (ISP / smart home solutions) and Philips (Hue / connected lighting) flesh out the home automation conversation in Germany.
Germany is catching up in wearables

The German wearables market is still underdeveloped compared to the UK and US, but it is growing significantly year over year. Smartwatches and fitness trackers are especially popular, according to PwC.
Apple is driving the wearables conversation, but Fitbit is gaining steam

German interest in wearables has been continuously growing for several years. Apple (with its smartwatch specifically) has been driving the conversation, but Fitbit is gaining popularity and carving out a growing market for activity trackers.
Apple and Fitbit dominate German wearables market

Within the wearables conversation, Apple and Fitbit are the two dominant brands, followed by Samsung. As a result, user-generated photos of food, fitness, and performance tracking are becoming increasingly more common.

### Common Objects in the Wearables Conversation

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>17%</td>
<td>Food</td>
</tr>
<tr>
<td>14%</td>
<td>Produce</td>
</tr>
<tr>
<td>8%</td>
<td>Circle</td>
</tr>
<tr>
<td>6%</td>
<td>Physical fitness</td>
</tr>
<tr>
<td>6%</td>
<td>Person</td>
</tr>
</tbody>
</table>
Digital currencies & blockchain technology

Bitcoin dominates German search interest for digital currencies

In terms of cryptocurrency interest in Germany, it's all about Bitcoin. The next on the list, Ripple, accounts for only about 10% of the search volume of Bitcoin, and blockchain has yet to make a real impact in Germany.
Social volume about digital currencies peaked in 2017

German online conversations about cryptocurrencies and blockchain reached a peak in 2017 — when Bitcoin prices spiked — but have been declining ever since.
Executive Summary
Executive Summary

Social & Political Trends

• The last German election has resulted in a more complex and fragmented political landscape in Germany, and the public opinion about Chancellor Angela Merkel, reflected in her social sentiment, has been declining over time, mostly driven by her controversial immigration politics related to the Syrian refugee crisis.

• Immigration and social injustice are the two biggest political topics in Germany at the moment. Although the backlash against immigration is driving an increase in right-wing votes, especially in Eastern Germany, the topic remains mostly undiscussed online and appears to be a ‘silent issue’.

• Brexit-related conversations are slowly declining, while worries about Donald Trump and Germany’s relationship with the US are rising.

Transportation

• #Dieselgate was the biggest scandal within the German automotive industry in the last decade and has generated more than 65,000 conversations on German public social media from October 2015 through the time of writing this report.

• Although the Volkswagen scandal affected up to 12 million diesel cars in Germany alone and cost the company more than $30 billion, social conversation and stock prices suggest that the company has largely recovered.
Transportation (cont.)

• Diesel car sales declined 21% for Q1 2018 YoY in Germany.

• German car buying conversations show a relative decrease in purchase intent for VW compared to rival brands Ford & Fiat, indicating a longer-lasting damage of reputation for the VW Brand as a result of the scandal.

• With only minor YoY sales changes for 2017 vs. 2016, the VW brand remains the biggest car manufacturer in Europe, with slightly over 1.7 million cars sold in Europe alone.

• Both electric cars as well as electric bicycles are experiencing a significant uptrend in interest in the German market, with e-bikes averaging double the amount of search demand as electric cars. High prices and a lack of technological infrastructure are preventing electric cars from being commercially viable on a large scale.

• Compared to other engine technologies, hybrid appears to have the highest potential to become the next engine standard for future transportation based on German search behaviour.

• Within the topic of hybrid cars, fuel cell technology appears to be the most promising alternative to traditional engines.

• German auto brands aren’t considered leaders in conversations about the future of transport. The Prius, manufactured by Toyota, is the most discussed sustainable model.

• The first German brand to follow is ironically Volkswagen, with less than half (1,328 vs. 2,877 for Toyota) conversations mentioning future of transport.
Technology

• Search based interest in privacy and data protection related topics shows a 15 year all time high with most of that trend being driven by current changes of regulation (GDPR / DSGVO).

• When comparing UK search trends with those in Germany, we can see that the topic of data protection generally receives about 60% more attention in Germany than in the UK.

• German “angst” about privacy violations and breaches of data protection are mostly related to topics revolving around data and identity theft, violations of personal privacy, infringement on sensitive person-related data (e.g. medical or bank records), breaches of fiscal secrets as well as behaviour of intelligence agencies.

• Mobile data usage is growing at an exponential rate in Germany, likely to surpass 1GB average monthly data use in 2018. However, Germany is still trailing the UK in terms of mobile commerce.

• Short battery life for mobile phones is declining as a conversation topic, while TV and video streaming are growing.

• The German IoT market is growing but is still underdeveloped compared to other markets, especially the US, Japan, and the UK. Less than 10% of German adults owned an IoT device in 2016.

• Over the last five years, the German interest in wearables has been continuously growing with Apple and Fitbit driving the market, selling mostly smartwatches and activity trackers.

• Bitcoin is dominating interest in German searches whilst other cryptocurrencies fall largely short of similar interest.
Appendix
Our Approach: Framework-Driven Digital Insights

We deploy a host of services, frameworks and techniques. How can we add value for you? Contact us: hello@braingraph.com

- Audience segmentation
- Competitive benchmark
- Digital marketing effectiveness analysis

- Market opportunity analysis
- Digital growth analysis
- Digital traffic and revenue forecast

- Digital UX and performance analysis
- Digital trend analysis
- Digital innovation analysis
About Crimson Hexagon

Crimson Hexagon helps global brands better understand their consumers. With instant access to the world’s largest volume of unstructured text and images across social, online public, and enterprise-held data sources, Crimson Hexagon’s AI-powered consumer insights platform allows clients to analyze audiences, track brand perception and campaign performance, and even detect competitive and market trends. Our clients include Anheuser-Busch InBev, Adidas, General Mills, Paramount Pictures, General Motors, and Twitter.

AI-Powered Consumer Insights

To learn more about how Crimson Hexagon can help small marketing teams, schedule a personalized demo with Crimson Hexagon today.