

Two-Wheeler Upgrades in India Increase, but Satisfaction Remains Flat

Bajaj, TVS and Yamaha Receive Two APEAL Awards Each; Hero Receives One Award

- Overall satisfaction with two-wheelers in India declines by 1 point on a 1,000-point scale
- Looks and styling receive the highest satisfaction scores
- Fuel and battery charging and performance receive lowest satisfaction scores

New Delhi: 16 March 2026 – Even with manufacturers introducing new styling, technology features and ride enhancements, overall owner satisfaction with two-wheelers in India decreases by 1 point (on a 1,000-point scale) to 859 in 2026, according to the JD Power 2026 India Two-Wheeler Automotive Performance, Execution and Layout (2WAPEAL) StudySM. The results indicate that while product innovation continues across the industry, rising customer expectations are balancing the gains in perceived appeal.

“The Two-Wheeler APEAL is an important measure of how well two-wheelers deliver on the ownership experience from the customer’s perspective,” said **Atsushi Kawahashi, senior director of JD Power Japan**. “The insights help manufacturers understand which product attributes most strongly influence owner satisfaction and emotional connection with their two-wheeler, providing guidance for product development, feature prioritization and overall vehicle design.”

“Two-wheeler manufacturers are rapidly expanding the availability of connected and digital features across a wider range of models,” said **Pronab Gorai, engagement director at Differential in Singapore**. “Digital instrument clusters, Bluetooth connectivity and smartphone integration are now offered at multiple price points and these features see increased adoption, but with varying satisfaction across different customer demographics. As these technologies become more common, manufacturers will need to better understand rider expectations around connectivity across segments and customer demographics and design product executions that deliver a seamless and meaningful user experience.”

Following are key findings of the 2026 study:

- **Looks and styling score highest:** Among the factors measured in the study, looks and styling receive the highest levels of satisfaction across all segments, with overall satisfaction increasing by 5 points to 868 in 2026. This shows the growing importance of design and visual appeal in the two-wheeler ownership experience. Manufacturers continue to introduce sharper styling, distinctive graphics and premium design elements that resonate strongly with owners.
- **Fuel consumption satisfaction drops:** By comparison, fuel consumption among internal combustion engine (ICE) models has a satisfaction score of 841 in 2026, a

decrease of 15 points from 2025. This highlights the continued importance that riders place on everyday operating efficiency.

- **Battery and charging performance and fuel satisfaction drops:** Among owners of electric two-wheelers, battery and charging performance satisfaction score is 849 while overall satisfaction with fuel satisfaction in ICE two-wheelers scores 841, marking the two lowest-scoring attributes in the study.
- **Connectivity features lag:** Across both ICE and electric two-wheelers, connectivity features and companion mobile applications also receive comparatively lower satisfaction scores than other evaluated attributes.

Highest-Ranking Models

- Scooter Economy Segment: **TVS Jupiter** ranks highest with a score of 855.
- Scooter Executive Segment: **Hero Destini 125/ Destini Prime** ranks highest with a score of 871.
- Motorcycle Economy Segment: **TVS Sport** ranks highest with a score of 869.
- Motorcycle Executive Segment: **Bajaj Pulsar 125** ranks highest with a score of 872.
- Motorcycle Premium Segment: **Yamaha FZ/ FZS/ FZX** ranks highest with a score of 875.
- Motorcycle Premium Plus Segment: **Yamaha MT-15** ranks highest with a score of 865.
- Scooter EV Segment: **Bajaj Chetak Series 30/ Series 35** ranks highest with a score of 882.

The study conducted in collaboration with Differential, Singapore, measures owners' satisfaction with their two-wheelers across various vehicle systems. The study covers 55 individual product level attributes across vehicle systems such as seats; looks and styling; controls, switches and locks; engine and transmission; fuel economy; and ride and handling. For electric two-wheelers, additional categories charging and driving range; and pickup and performance is included. Also, with the growing introduction and adoption of connectivity features, an additional category has been introduced in this year's study to measure satisfaction with connectivity and mobile app performance for all segments.

The 2026 India Two-Wheeler APEAL (2WAPEAL) is based on responses from 6,381 new two-wheeler owners, including both internal combustion engine and electric powertrains, who purchased their vehicle from March through December 2025. The study was fielded from September 2025 through January 2025. Fieldwork was conducted through face-to-face surveys in 42 major cities in India covering over 80 two-wheeler models from 15 nameplates. Brands included in the study are ranked according to aggregate score out of 1,000 index points, with a higher score indicating better performance.

For more information about the 2026 India 2W APEAL, visit <https://www.jdpower.com/>.

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About Differential

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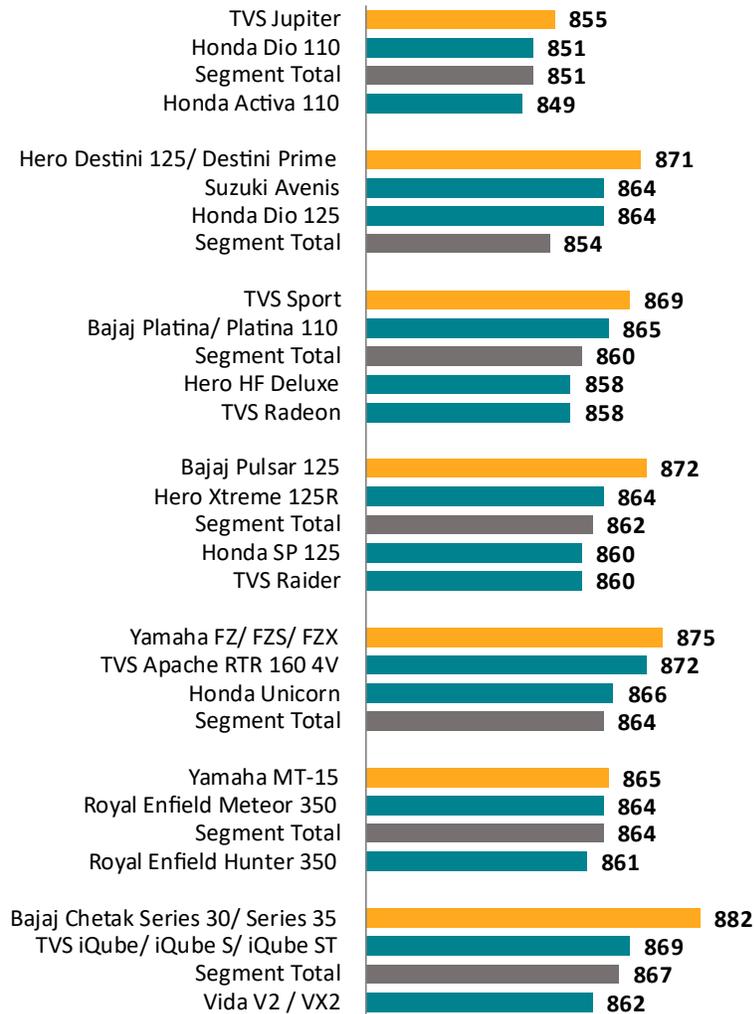
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Note: One chart follows.

JD Power 2026 India Two-Wheeler APEAL StudySM (2WAPEAL)

Top Three Models per Segment (Based on a 1,000-point scale)



Note: Only the top three models per segment are shown above. Official rankings are published only for segments with at least three models with sufficient sample and at least one with a 2WAPEAL score better than segment average.

Source: JD Power 2026 India Two -Wheeler APEAL StudySM (2WAPEAL)

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