

## Fuel Economy Remains Key Driver of Two-Wheeler Satisfaction in India, J.D. Power Finds

Honda Receives Three APEAL awards; TVS Receives Two APEAL Awards

**DELHI: 2 March 2023** – Continued high level of petrol prices results in owners of two-wheelers powered by internal combustion engines (ICE) placing more importance on fuel economy performance when determining vehicle product satisfaction, according to the J.D. Power 2023 India Two-Wheeler Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup> (2WAPEAL), released today. Having said that, owners appreciate the industry performance with 80% of them citing that the fuel efficiency they experience is in line with their expectations. After a hiatus since 2019, J.D. Power has re-launched the India Two-Wheeler APEAL Study this year in collaboration with NielsenIQ.

Interestingly, the importance of fuel efficiency as a reason to purchase is high only in the entry level motorcycle segment. Across other segments, owners cite aspects such as styling, engine performance and reliability as more important purchase drivers.

In this year's study, the industry average is 823 points (on a 1,000-point scale). In both the scooters and motorcycles segments, the average is 821. For the first time, the study includes the electric two-wheeler segment, which averages 838.

"While fuel efficiency has always been an important driver of satisfaction, owners in the upper executive and premium segments have in past attached a lower importance to it," said **Sandeep Pande, lead of the automotive practice India at NielsenIQ**. "However, the sustained high levels of fuel prices pivot owners to be more sensitive to this parameter, especially when considering their product satisfaction levels."

Following are additional key findings of the 2023 study:

- **Charging and connectivity drive electric two-wheelers' owner satisfaction:** Key drivers of product satisfaction among EV owners are the range of the vehicle, ease of use of mobile application and ease of home charging.
- **Much lower APEAL scores among youngest cohort:** APEAL scores are lower among owners under 30 years of age (814 points) than among owners in the other age brackets (832 on average).
- **Owners unsure of brand repurchase:** A notable percentage—42%—of two-wheeler owners say they are unsure of repurchasing the same brand for their next vehicle.

### Highest-Ranking Models

- **Honda Dio** ranks highest in the scooter economy segment with a score of 831
- **TVS Ntorq** ranks highest in the scooter executive segment with a score of 838
- **Honda Dream** ranks highest in the motorcycle economy segment with a score of 838
- **TVS Raider** ranks highest in the motorcycle executive segment with a score of 850
- **Honda Unicorn** ranks highest in the motorcycle premium segment with a score of 831

The study measures owners' satisfaction with their two-wheeler in various vehicle systems. The study covers 52 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. An additional category for connectivity is included for electric two-wheelers.

The 2023 India Two-Wheeler APEAL Study (2WAPEAL) is based on responses from 7,465 new two-wheeler owners who purchased their vehicle from March through November 2022. The study was fielded from August through December 2022. NielsenIQ conducted face-to-face surveys in 40 major cities in India, asking more than 200 questions of two-wheeler owners about their product experience in their initial months post purchase. After conducting the surveys, the responses were cleaned for data quality and calculated. Brands included in the study are ranked according to an aggregate score on a 1,000-point scale, with a higher score indicating a better performance.

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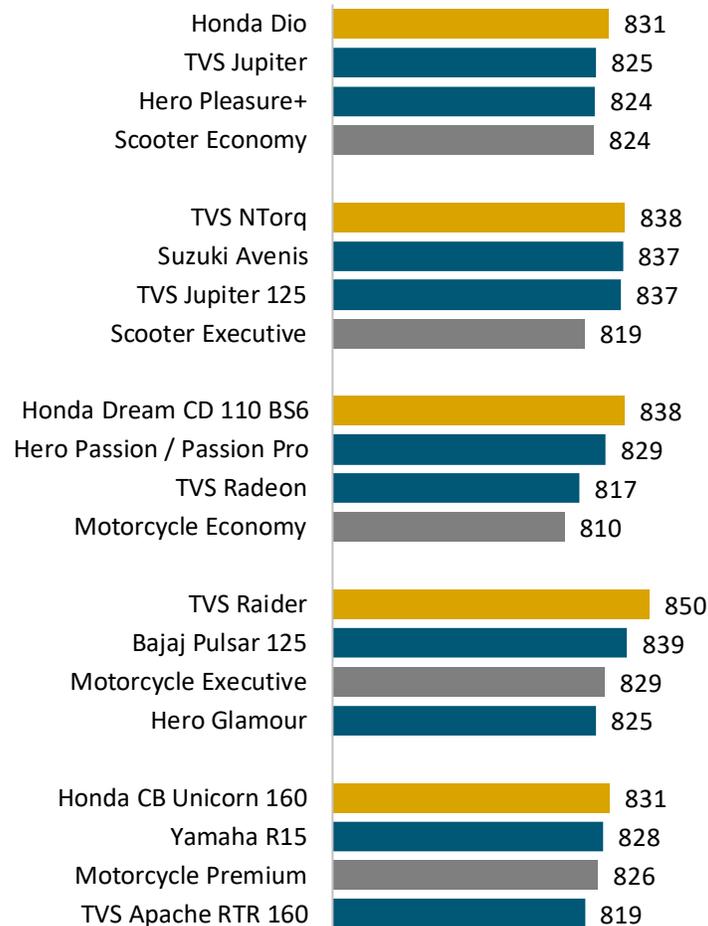
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NOTE: One chart follows.

# J.D. Power 2023 India Two-Wheeler APEAL Study<sup>SM</sup> (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. No official rankings are published for Motorcycle Upper Executive, Motorcycle Premium Plus and Electric 2W segments.*

Source: J.D. Power 2023 India Two-Wheeler APEAL Study<sup>SM</sup> (2WAPEAL)

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