

# INTAGE India Report

## *2-Wheeler Owners Brand Relationship Survey*

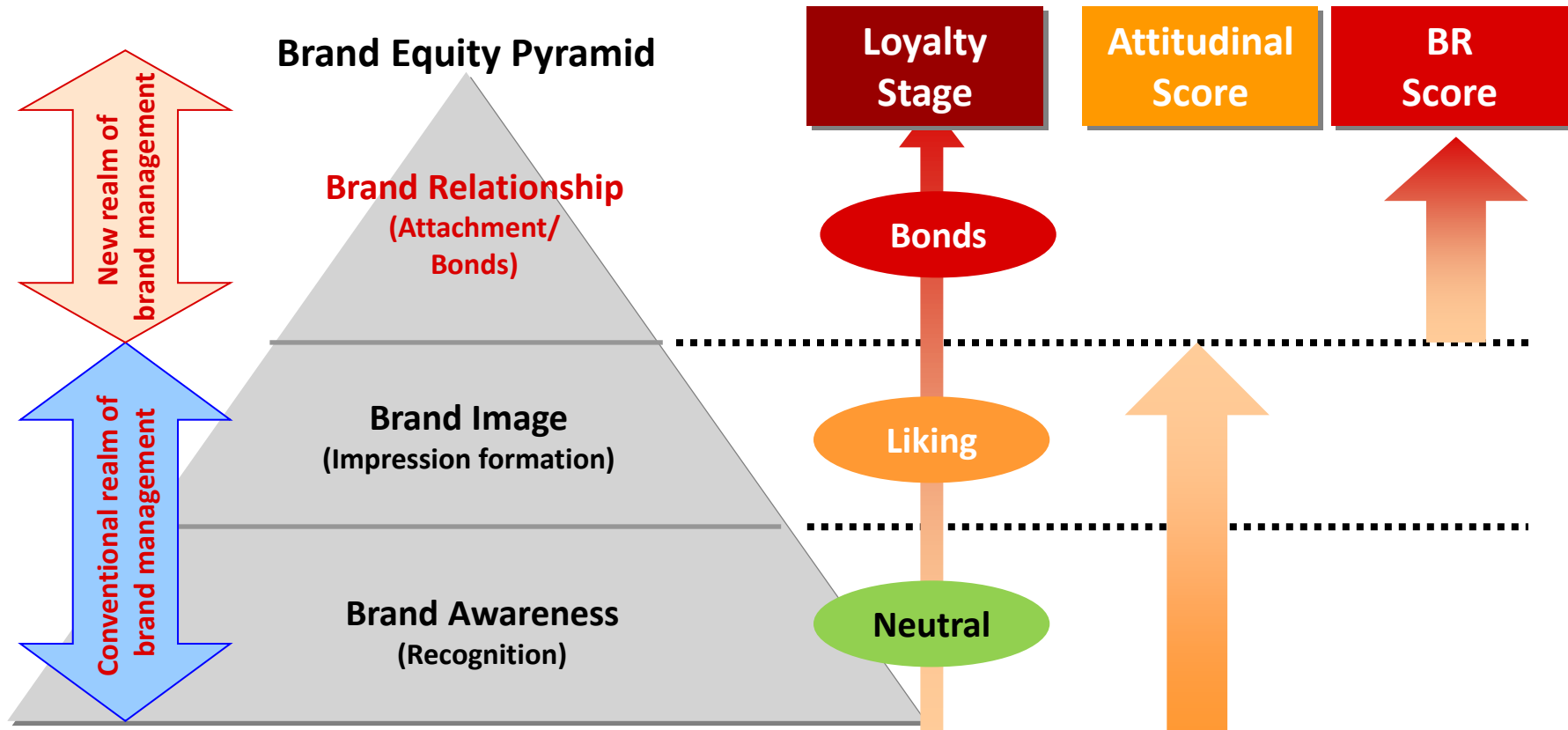
Feb, 2021



# ***About Brand Relationship Survey***

# To understand relationship between Customers and Brand

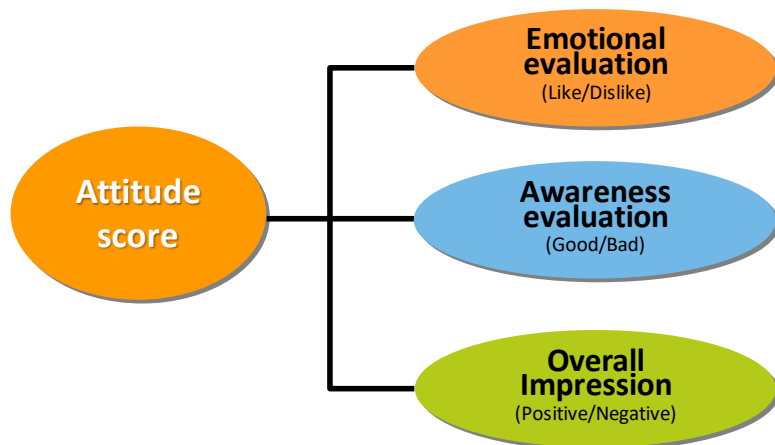
- The strength of BONDS cannot be evaluated sufficiently through a brand attitude score alone such as brand image and awareness.
- INTAGE suggests the Brand Relationship score to clearly understand the Brand Equity



# How to Measure Attitude and BR Score

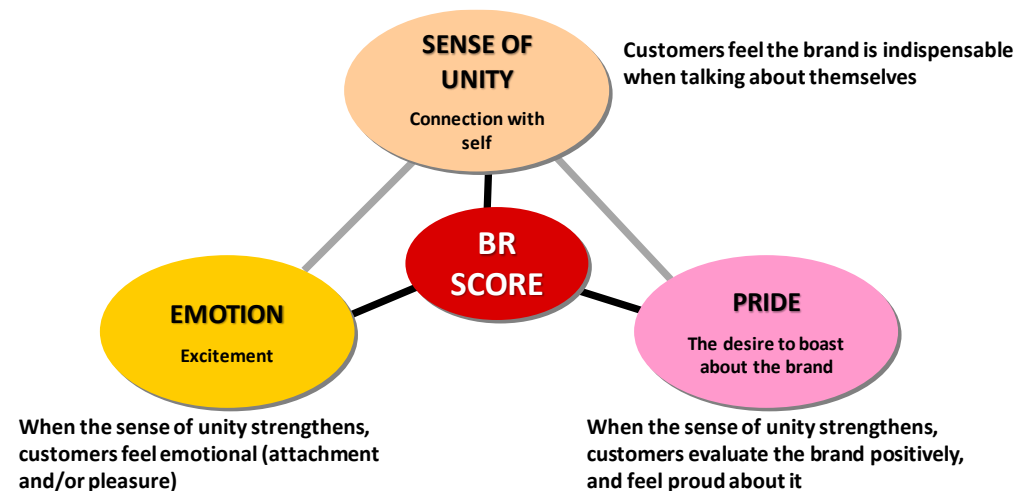
## Attitudinal score

- Brand attitude is a traditionally used concept in marketing research in order to predict/explain customer purchase behavior.
- Measurements are generally taken of customers' evaluations of a brand as being something they "like/dislike" or find "good/bad".



## BR score

- Brand relationships are about perceptions of connection with a brand
- The strength of this perception can be ascertained through 3 elements
- The base is "Sense of unity", with "Emotion" and "Pride" strengthening perceptions of connection (perceptions of bonds)



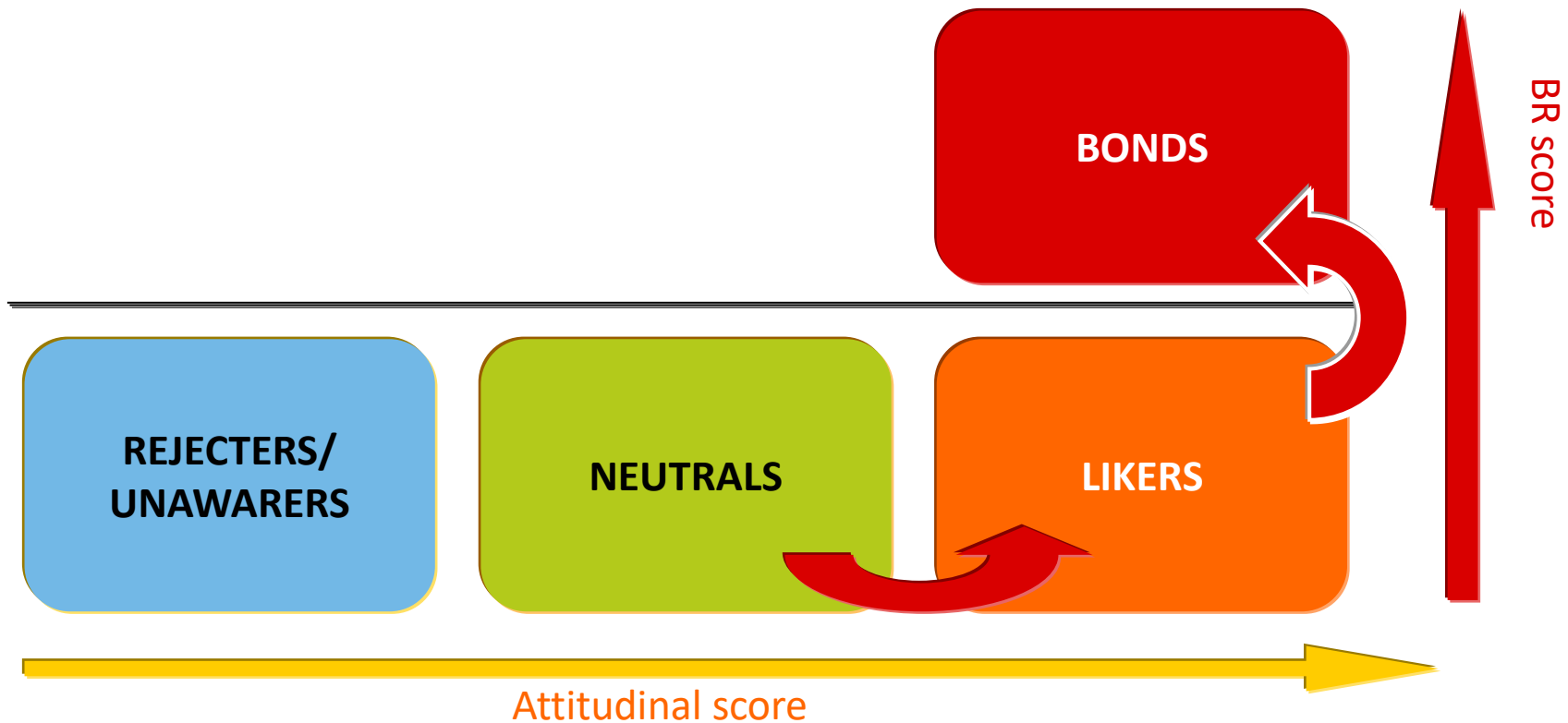
\* Scores are calculated using INTAGE weighting system based on measurement questions for the three elements

## Example of Questions to Measure BR Scores

1	I feel a strong connection with "XXXX"
2	"XXXXX" is like a part of me
3	If I were to compare it to a person, "XXXXX" would be more like a family member, close friend, or lover than a mere acquaintance to me.
4	It somehow feels fun to think about "XXXXX"
5	It makes me a bit happy to think about "XXXXXX"
6	It is somehow pleasing to think about "XXXXX"
7	I sometimes want to boast to people that "XXXXX" is a favorite of mine
8	I'm proud that "XXXXXX" is a favorite of mine
9	It is somehow pleasing when people notice that "XXXXXX" is a favorite of mine

# Dividing Customers into 4 Segments

- Customers are divided into 4 segments in line with the extent of their loyalty, based on their attitudinal and BR scores.
- Strategies for increasing BONDS and LIKERS are then considered in order to nurture a stronger brand.



# How BONDS Behave?

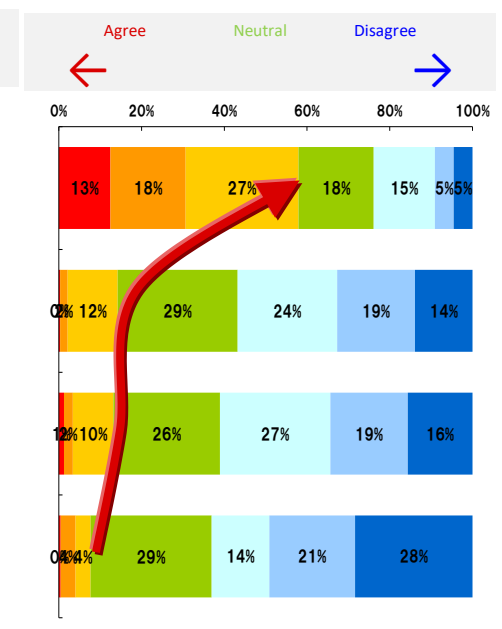
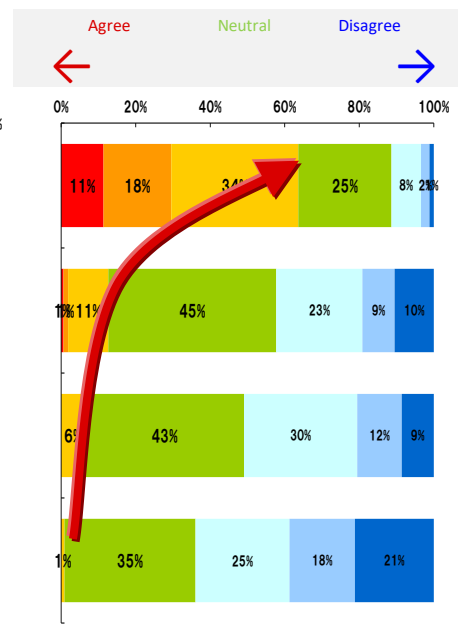
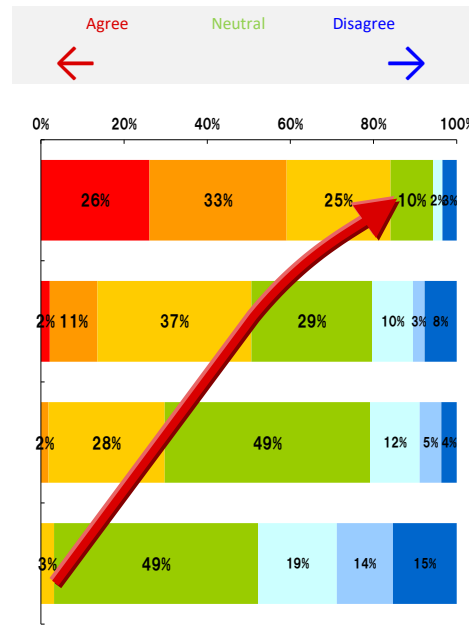
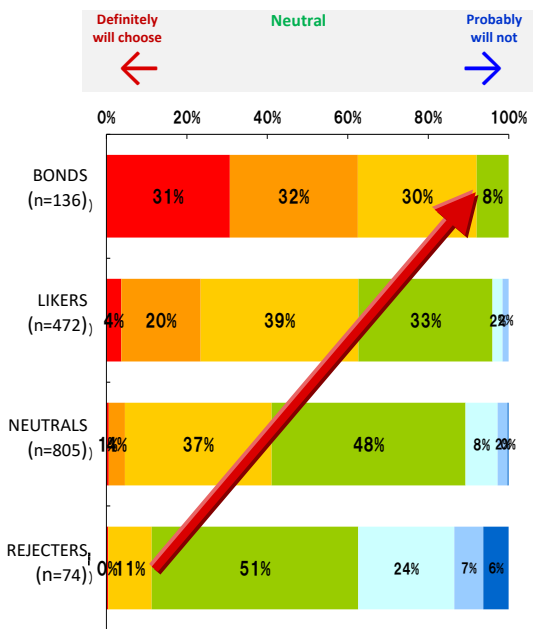
- From the different questions to measure the strength of brand relationship, BONDS would be more brand royal comparing to other segments.

Q. How much do you intend to continue choosing it?

Q. Would you post comments in review site?

Q. Would you react against someone's criticism about the brand?

Q. Do you not think very much about brands other than your brand?



\*INTAGE internal survey

# ***Research Design***



# Survey outline

<b>Objective</b>	<ul style="list-style-type: none"><li>• To measure the strength of brand relationship of two wheeler brands</li></ul>
<b>Methodology</b>	<ul style="list-style-type: none"><li>• Online survey through a structured questionnaire</li></ul>
<b>Target</b>	<ul style="list-style-type: none"><li>• Male</li><li>• Age 18-44 years old</li><li>• Two wheeler owners: Both motorcycle and scooter owners, but excluding commuter segment</li></ul>
<b>Area</b>	<ul style="list-style-type: none"><li>• India (Nationwide)</li></ul>
<b>Interview Length</b>	<ul style="list-style-type: none"><li>• Approx. 30 minutes</li></ul>
<b>Timing</b>	<ul style="list-style-type: none"><li>• Oct-Nov, 2020</li></ul>

# Model Wise Sample Collection – 209 samples in total

BAJAJ TOTAL	24
Avenger 220	3
Discover150	1
Pulsar 150	7
Pulsar 180F	1
Pulsar NS200	8
Pulsar RS200	2
Pulsar 220F	2
HERO TOTAL	15
<b>MC Total</b>	<b>4</b>
X Pulse 200	2
Xtreme160R	2
<b>SC Total</b>	<b>11</b>
Maestro/Maestro Edge	4
Maestro Edge 125	3
Duet	1
Pleasure/Pleasure+	3

HONDA TOTAL	75
<b>MC Total</b>	<b>22</b>
CB Hornet 160/160R	9
CB Unicorn150/160	8
CBR 250R/300R	4
X-Blade	1
<b>SC Total</b>	<b>53</b>
Activa 5G	24
Activa 6G	6
Activa 125	15
Dio	4
Aviator	2
Honda Grazia	2
KTM TOTAL	5
Duke125	2
Duke200	1
Duke 250	1
Duke 390	1

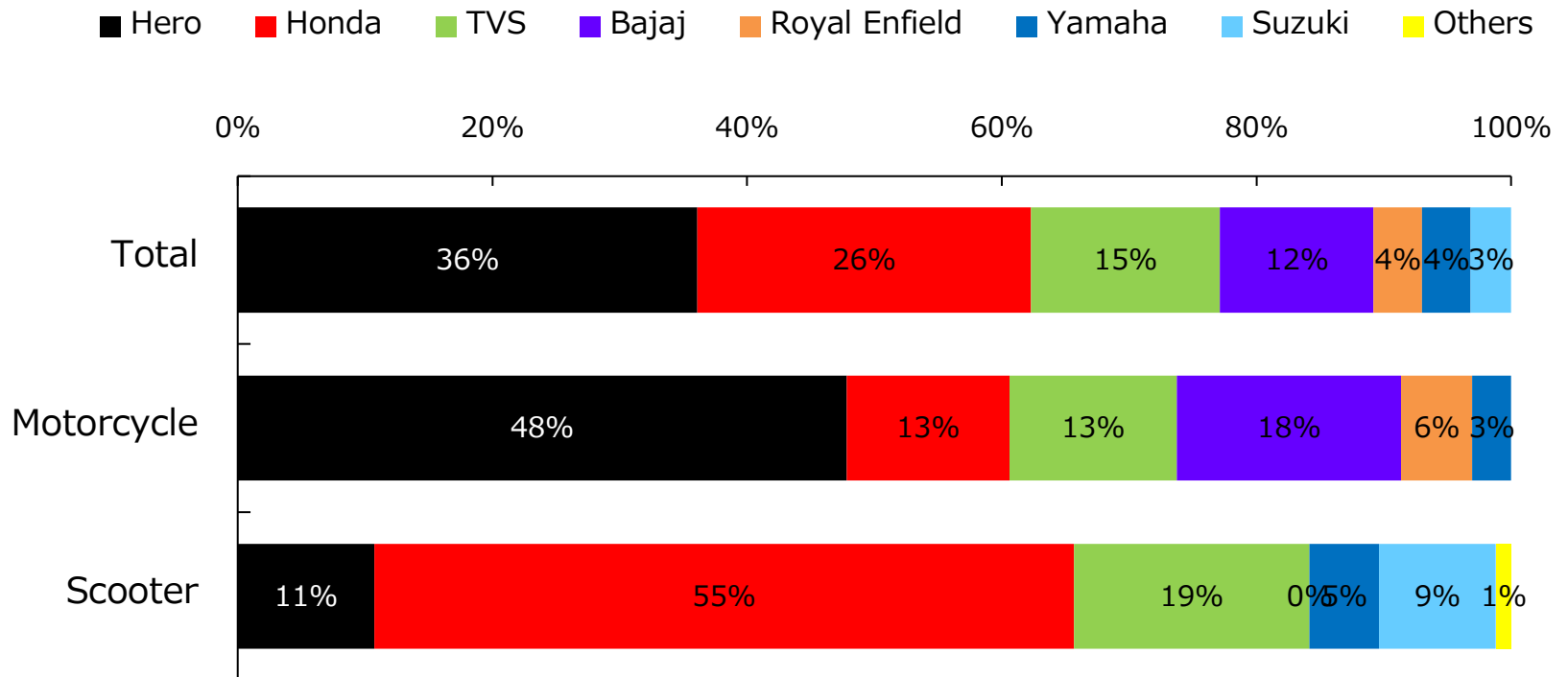
ROYAL ENFIELD TOTAL	14
Bullet 350	4
Bullet 500	1
Classic 350	6
Himalayan 400	2
Thunderbird 350	1
SUZUKI TOTAL	20
<b>MC Total</b>	<b>9</b>
Suzuki Gixxer150	3
Suzuki Gixxer150SF	1
Suzuki Gixxer 250	2
Suzuki Intruder 150	3
<b>SC Total</b>	<b>11</b>
Access 125	11

TVS TOTAL	26
<b>MC Total</b>	<b>16</b>
TVS Apache RTR 160	9
TVS Apache RTR 180	3
TVS Apache RTR 200	3
TVS Apache RTR 310	1
<b>SC Total</b>	<b>10</b>
TVS Jupiter/Jupiter Classic	9
TVS NTorq	1
YAMAHA TOTAL	27
<b>MC Total</b>	<b>21</b>
Yamaha FZ	13
Yamaha FZ25	2
Yamaha MT15	4
Yamaha R15	2
<b>SC Total</b>	<b>6</b>
Yamaha Ray ZR	1
Yamaha Fascino 125	5

# Sample collection and Analysis

- Weight has been given to each sample for the analysis according to the market share in 2019.

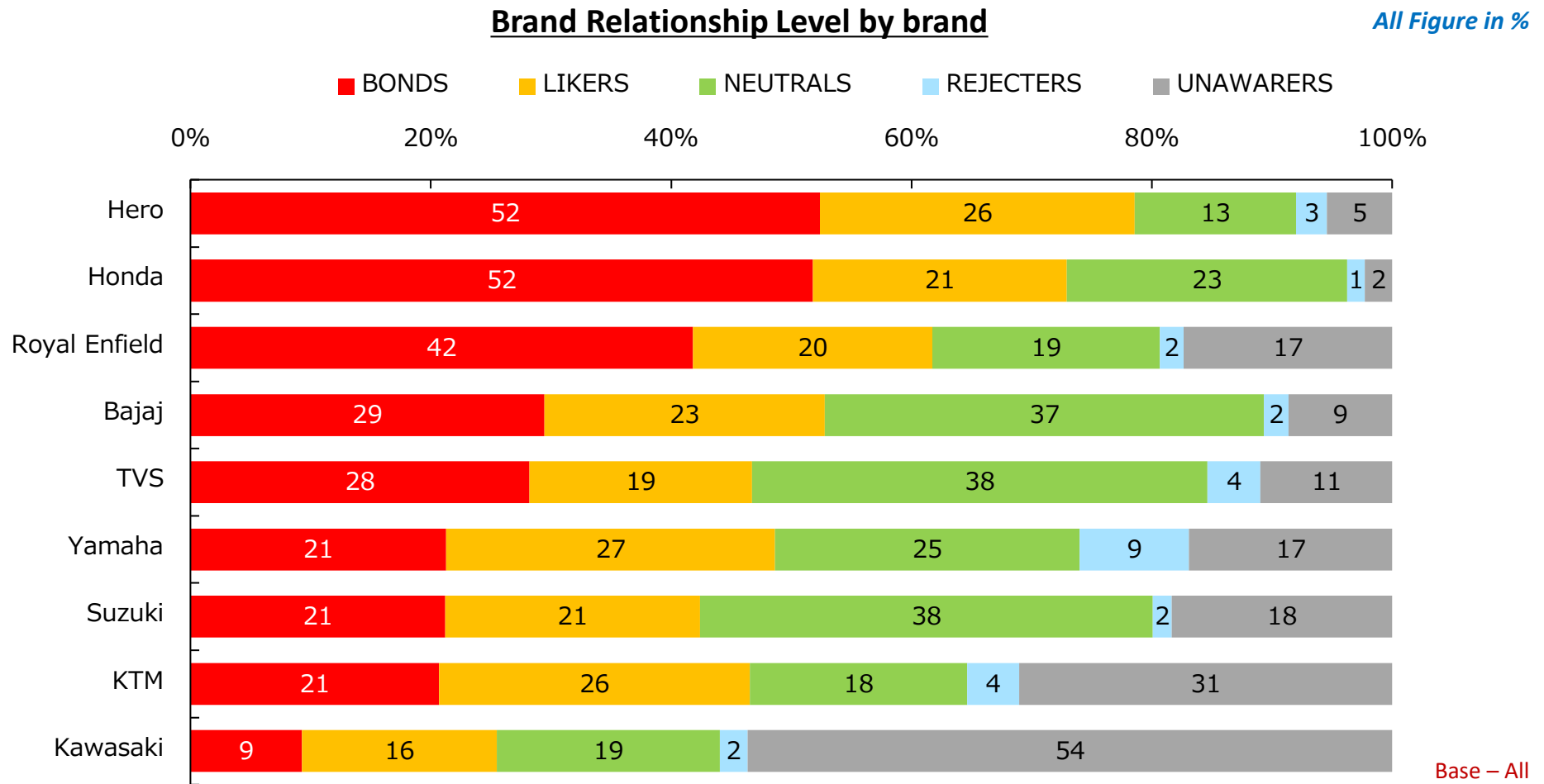
## Market Share in 2019



# ***Summary of the Survey***

# Summary – Brand Relationship

- BONDS is the highest for Hero and Honda owners followed by Royal Enfield.



# Composition of BOND by User Segment

- Comparing to composition of BOND for Hero and Honda, same as market share, Hero is higher among Motorcycle owners and Honda is higher among scooter owners.
- Yamaha and Suzuki has higher brand loyalty among scooter owners comparing to motorcycle owners.

	Total	Motorcycle Owners	Scooter Owners	Practical Brand Owners*	Performance Brand Owners*
<i>(n)</i>	<i>209</i>	<i>151</i>	<i>68</i>	<i>191</i>	<i>28</i>
Hero	<b>52%</b>	<b>60%</b>	35%	<b>57%</b>	18%
Honda	<b>52%</b>	<b>43%</b>	<b>67%</b>	<b>53%</b>	34%
Royal Enfield	<b>42%</b>	<b>44%</b>	36%	38%	<b>60%</b>
Bajaj	29%	39%	11%	32%	19%
TVS	28%	26%	33%	32%	7%
Yamaha	21%	18%	25%	15%	<b>43%</b>
Suzuki	21%	17%	32%	19%	35%
KTM	21%	26%	9%	17%	<b>44%</b>
Kawasaki	9%	13%	4%	8%	21%

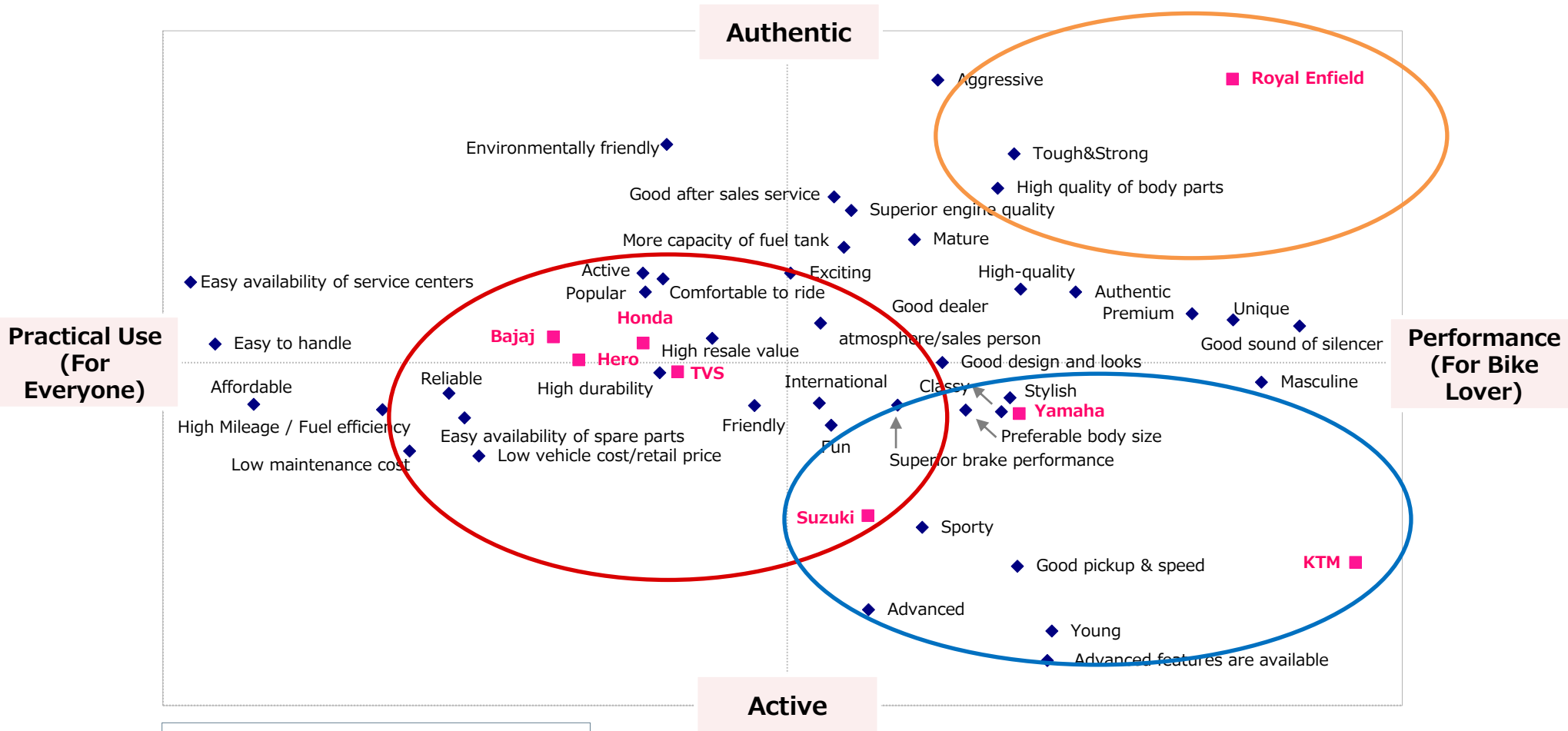
**\*Definition of owner segment**

Practical Brand Owners: Hero, Honda, Bajaj and TVS

Performance Brand Owners: Royal Enfield, Yamaha, Suzuki, KTM and Kawasaki

**Red Font: 40%+**

# Brand Perception Map

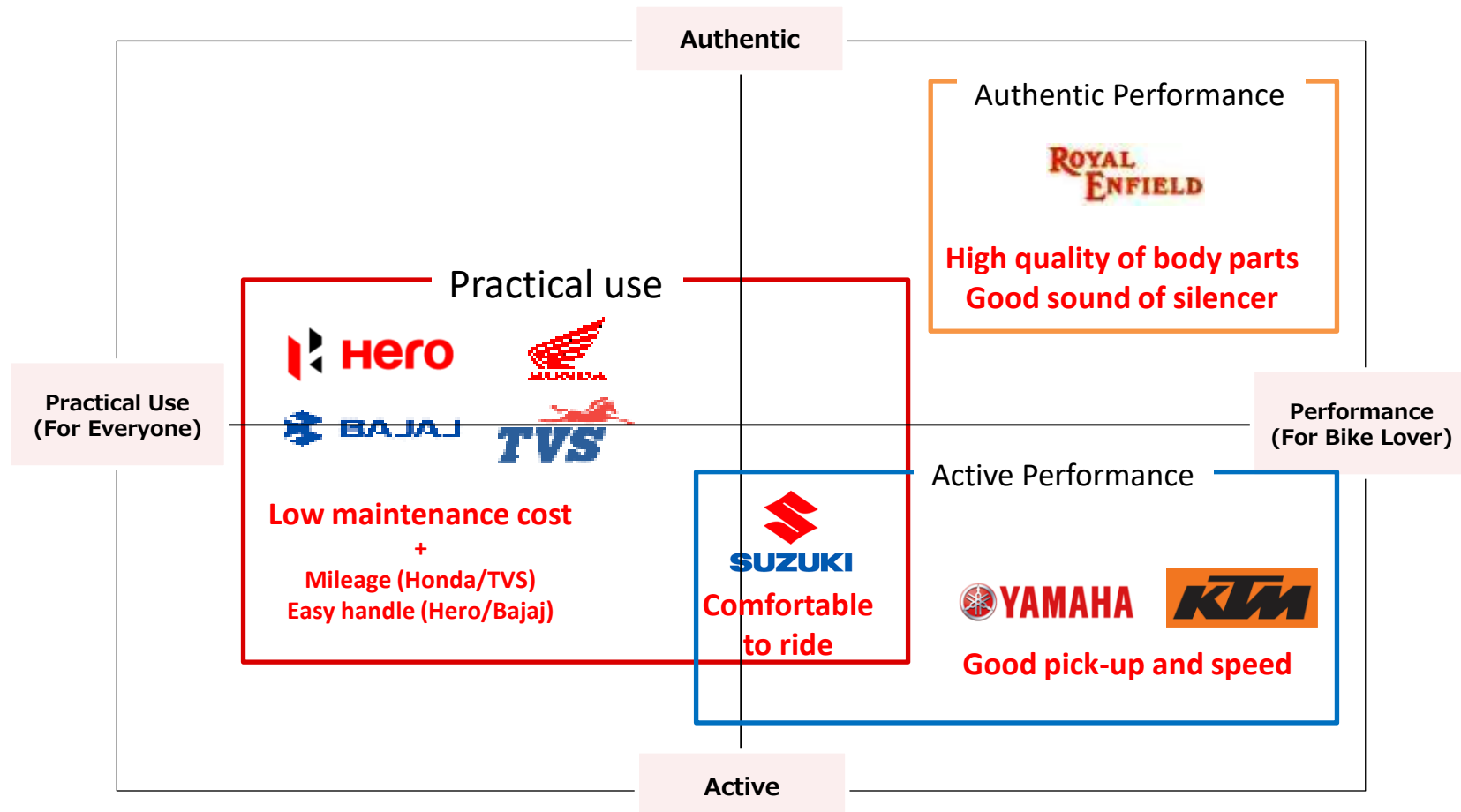


**Correspondence Analysis - Contribution ratio**  
 Axis1: 0.39  
 Axis2: 0.20

# Summary – Market Segmentation

- Two-wheeler market is broadly divided into three segments (1) Practical use, (2) Performance – Authentic, and (3) Performance - Active.
- Suzuki has both the aspects of Practical use and Performance.

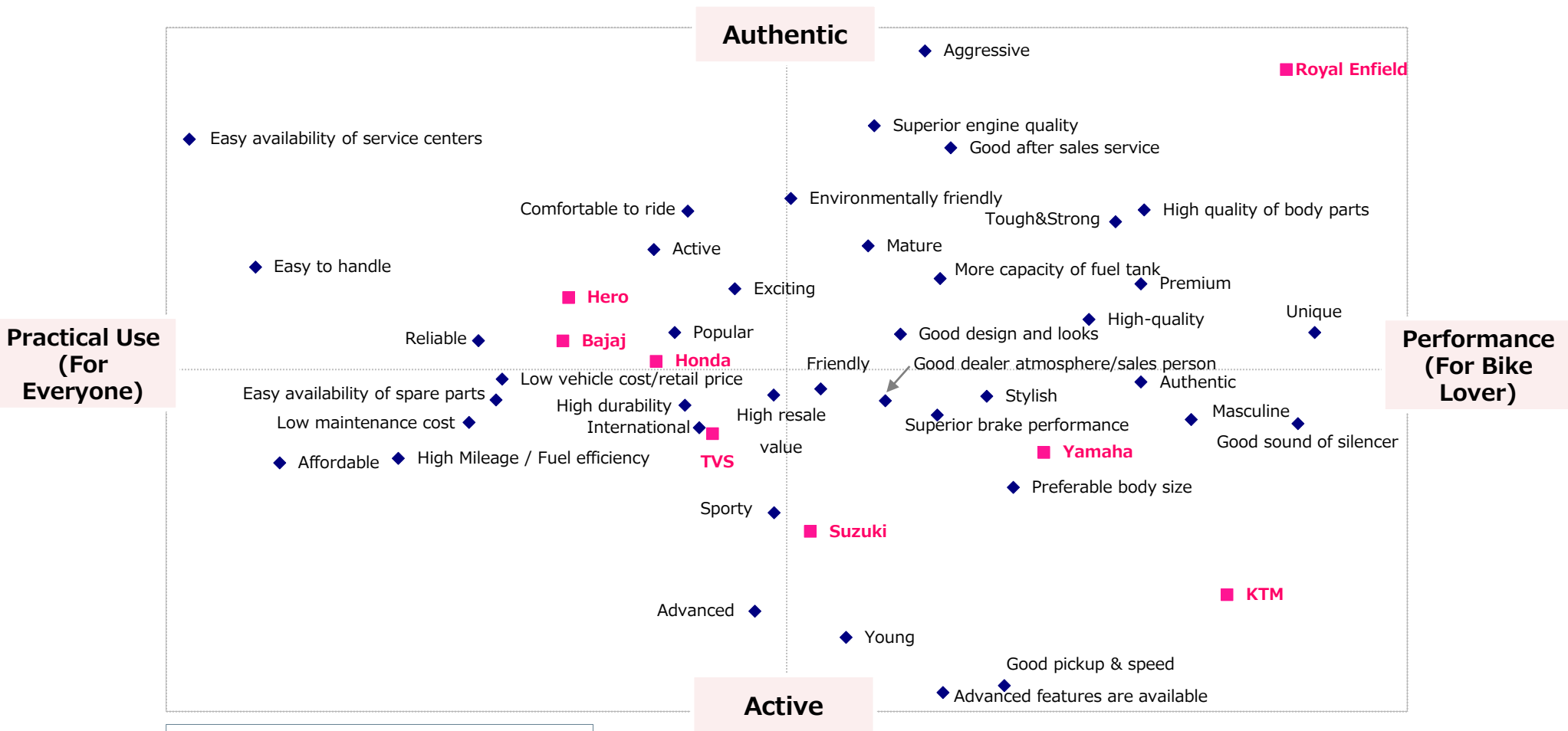
## [Brand Perception Map with Key Brand Image]





# Brand Perception Map – Motorcycle Owners Point of View

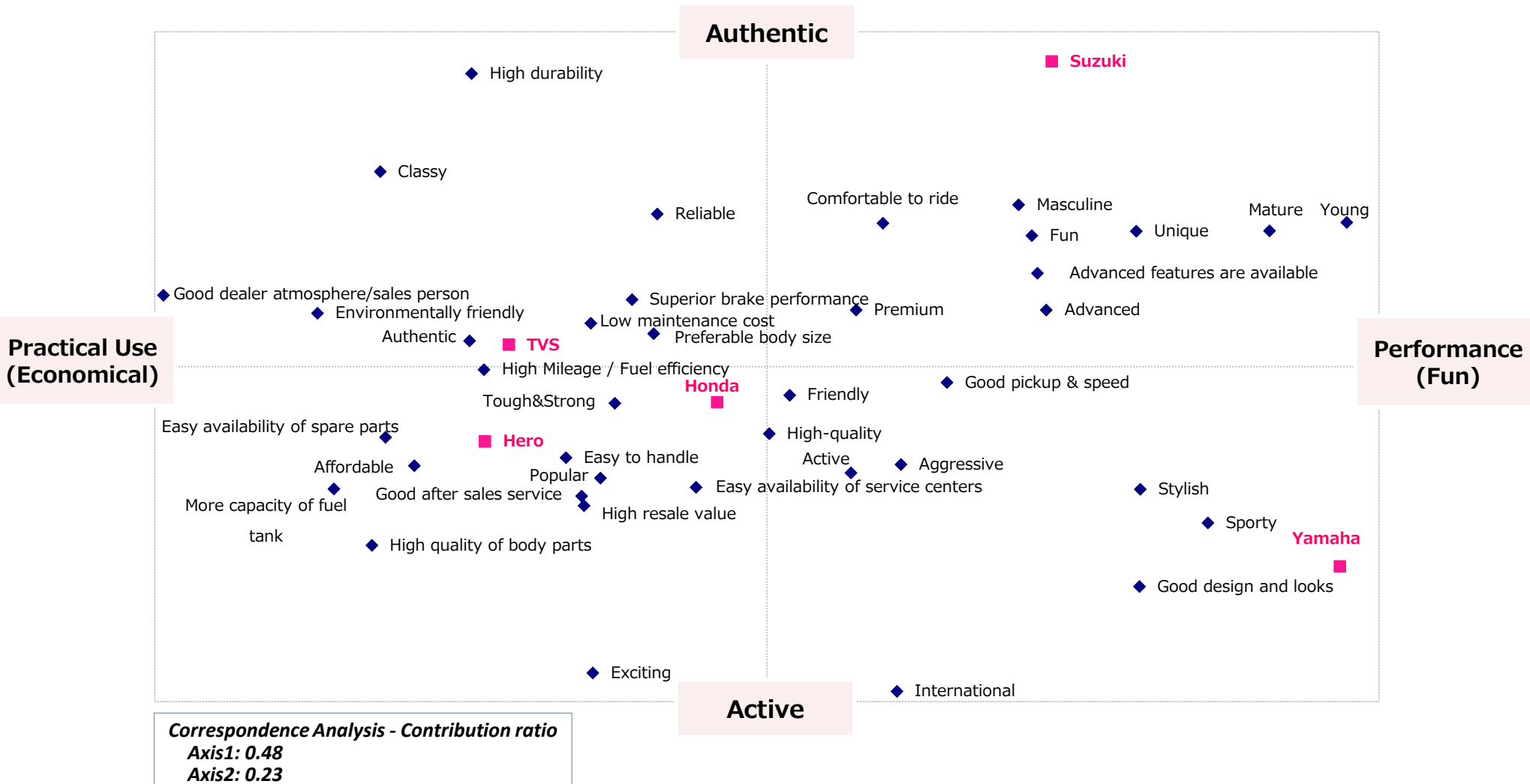
Base – Motorcycle Owners



Correspondence Analysis - Contribution ratio  
 Axis1: 0.34  
 Axis2: 0.20

# Brand Perception Map – Scooter Owners Point of View

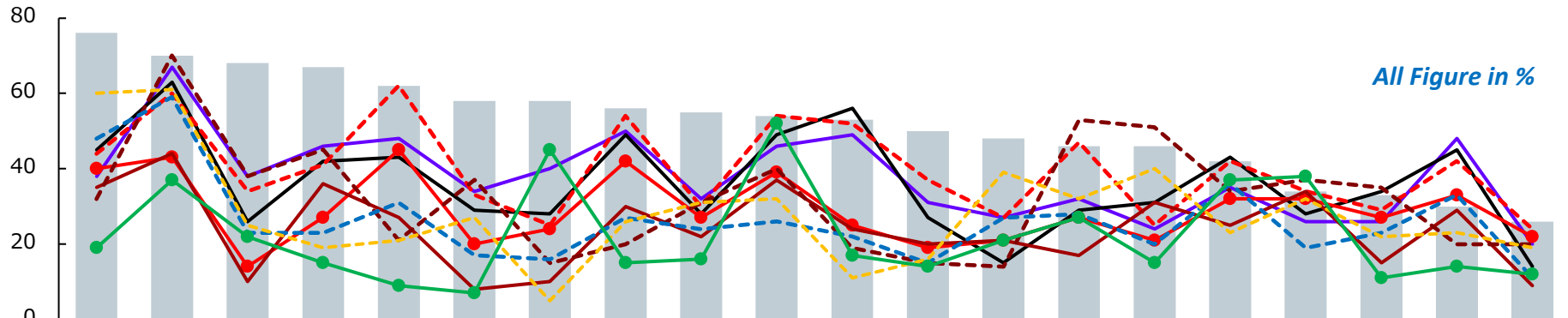
Base – Scooter Owners  
 \*Base is small for some brands so result is reference purpose only.



# Functional Image

## Functional Image

All Figure in %



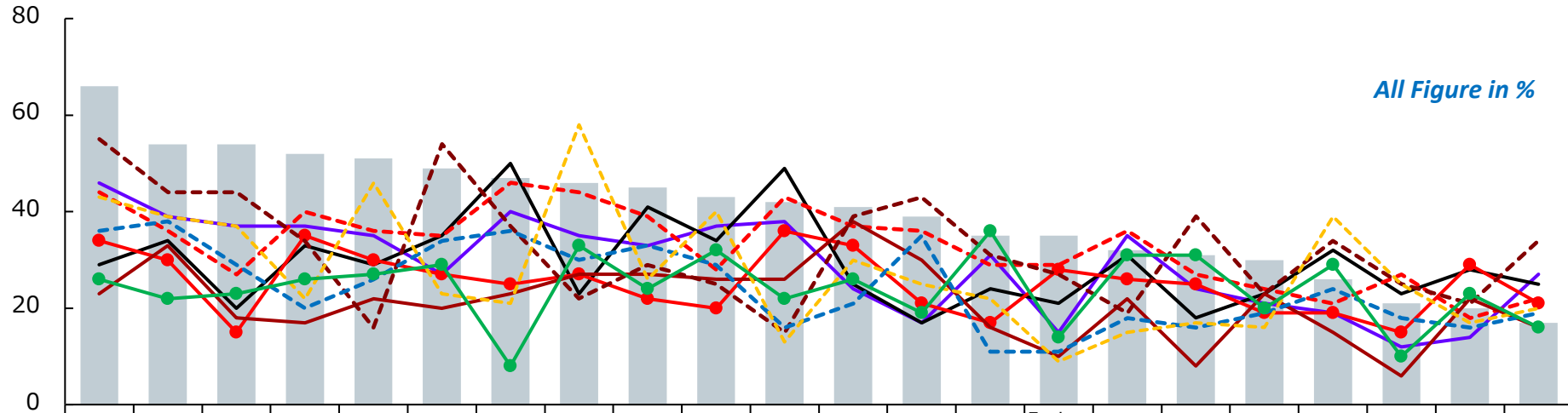
Top 3

	Good pickup & speed	Good design and looks	Superior engine quality	Comfortable to ride	High Mileage / Fuel efficiency	Good after sales service	Easy availability of service centers	Low maintenance cost	Superior brake performance	High durability	Easy to handle	Easy availability of spare parts	Advanced features are available	High quality of body parts	Good sound of silencer	High resale value	Preferable body size	More capacity of fuel tank	Low vehicle cost/retail price	Good dealer atmosphere/person
Important (219)	76	70	68	67	62	58	58	56	55	54	53	50	48	46	46	42	34	33	30	26
Hero (147)	38	67	38	46	48	34	40	50	32	46	49	31	27	32	24	35	26	26	48	20
Bajaj (90)	45	63	26	42	43	29	28	49	28	49	56	27	15	29	31	43	28	34	45	14
TVS (101)	40	43	14	27	45	20	24	42	27	39	25	19	21	27	21	32	32	27	33	22
Honda (134)	44	60	34	41	62	33	25	54	30	54	52	37	27	47	25	42	34	29	42	24
Suzuki (104)	35	44	10	36	27	8	10	30	22	37	24	20	21	17	31	25	34	15	29	9
Royal Enfield (83)	32	70	38	45	21	37	15	20	31	40	19	15	14	53	51	34	37	35	20	20
Yamaha (82)	48	59	23	23	31	17	16	27	24	26	22	15	27	28	20	36	19	23	33	11
KTM (80)	60	61	25	19	21	27	5	26	31	32	11	16	39	32	40	23	32	22	23	19
Kawasaki (40)	19	37	22	15	9	7	45	15	16	52	17	14	21	27	15	37	38	11	14	12

# Emotional Image

## Emotional Image

All Figure in %



Top 3

	High-quality	Stylish	Premium	Active	Advanced	Tough & Strong	Popular	Young	Friendly	Sporty	Affordable	Classy	Unique	Exciting	Environmentally friendly	Reliable	Aggressive	International	Masculine	Authentic	Fun	Mature
Important (219)	66	54	54	52	51	49	47	46	45	43	42	41	39	35	35	32	31	30	26	21	20	17
Hero (147)	46	39	37	37	35	27	40	35	33	37	38	24	17	31	15	35	24	21	19	12	14	27
Bajaj (90)	29	34	20	33	29	35	50	23	41	34	49	25	17	24	21	31	18	23	32	23	28	25
TVS (101)	34	30	15	35	30	27	25	27	22	20	36	33	21	17	28	26	25	19	19	15	29	21
Honda (134)	44	36	27	40	36	35	46	44	39	28	43	37	36	29	29	36	27	24	21	27	18	22
Suzuki (104)	23	33	18	17	22	20	23	27	27	26	26	38	30	16	10	22	8	23	15	6	22	16
Royal Enfield (83)	55	44	44	34	16	54	37	22	29	25	15	39	43	31	27	19	39	23	34	25	21	34
Yamaha (82)	36	38	29	20	26	34	36	30	33	29	16	21	35	11	11	18	16	19	24	18	16	19
KTM (80)	43	39	37	22	46	23	21	58	26	40	13	30	25	22	9	15	17	16	39	25	17	20
Kawasaki (40)	26	22	23	26	27	29	8	33	24	32	22	26	19	36	14	31	31	20	29	10	23	16

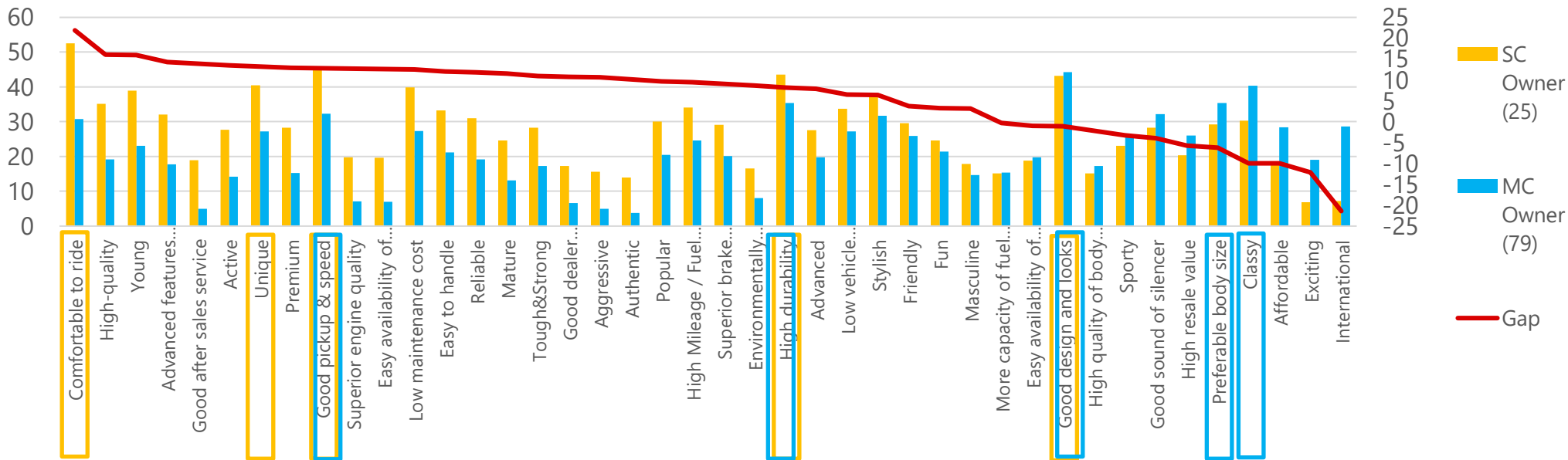
# Suzuki Image: SC owners vs MC owners

## SC Owners' Image Top 5

- ✓ **Comfortable to ride**
- ✓ Good pickup & speed
- ✓ High durability
- ✓ Good design and looks
- ✓ Unique

## MC Owners' Image Top 5

- ✓ Good design and looks
- ✓ Classy
- ✓ Preferable body size
- ✓ High durability
- ✓ Good pickup & speed



## SC > MC Gap Image Top 5

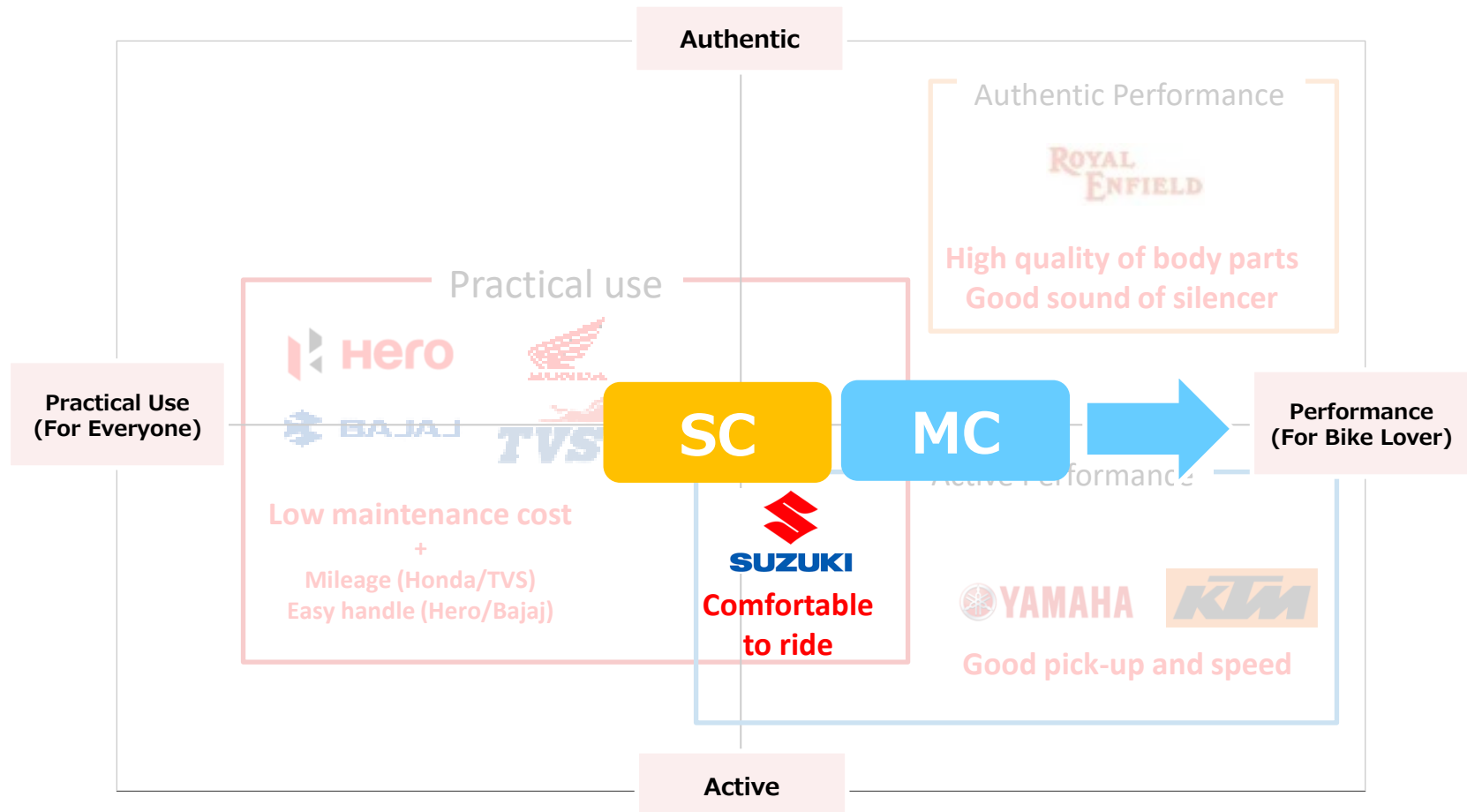
- ✓ **Comfortable to ride**
- ✓ High-quality
- ✓ Young
- ✓ Advanced features
- ✓ Good after sales service

## SC < MC Gap Image Top 5

- ✓ International
- ✓ Exciting
- ✓ Affordable
- ✓ Classy
- ✓ Preferable body size

# Summary – Market Segmentation

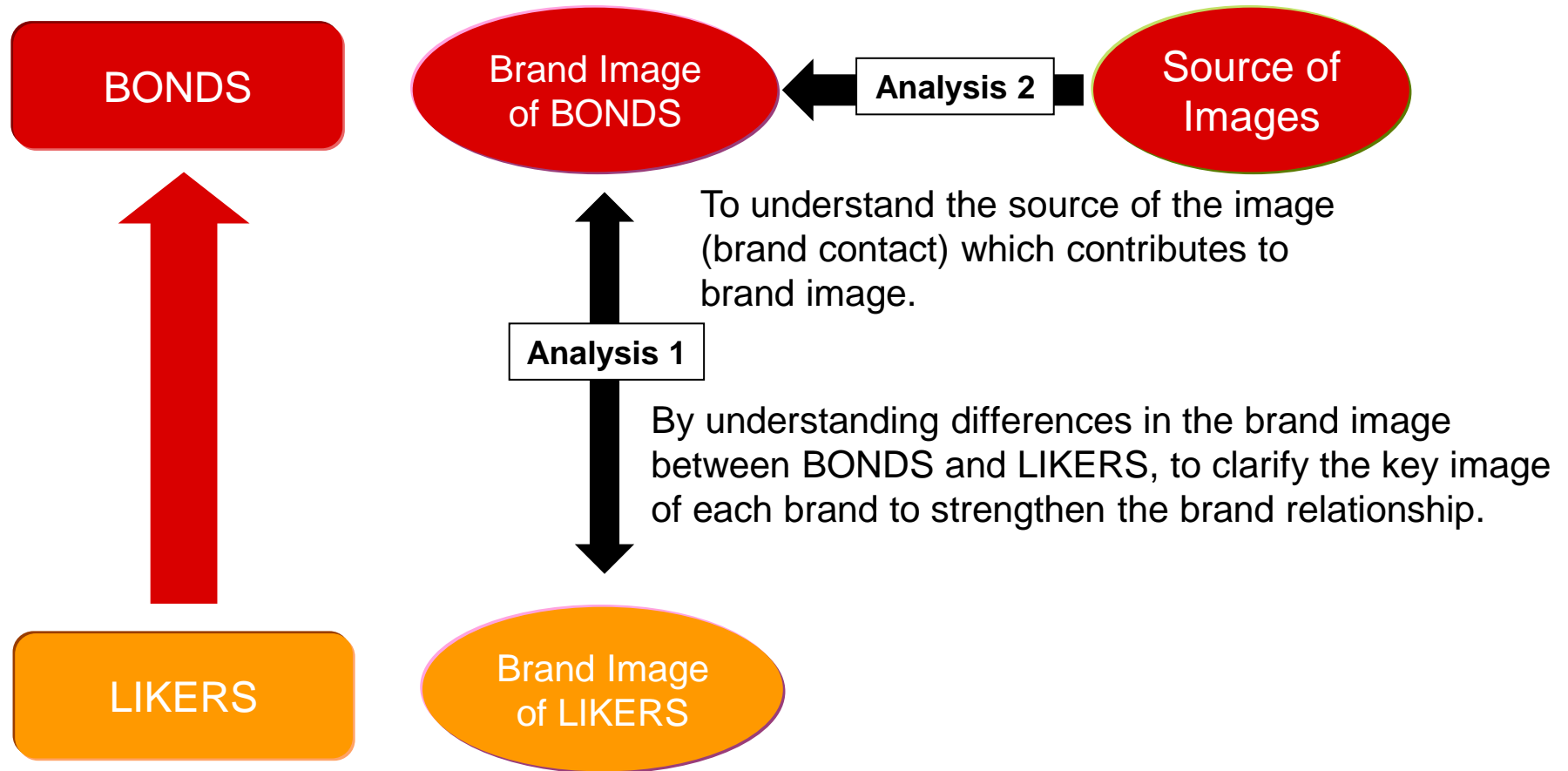
**[Brand Perception Map with Key Brand Image]**



# ***'Rank-Up' Analysis***

# Framework of Rank-Up Analysis

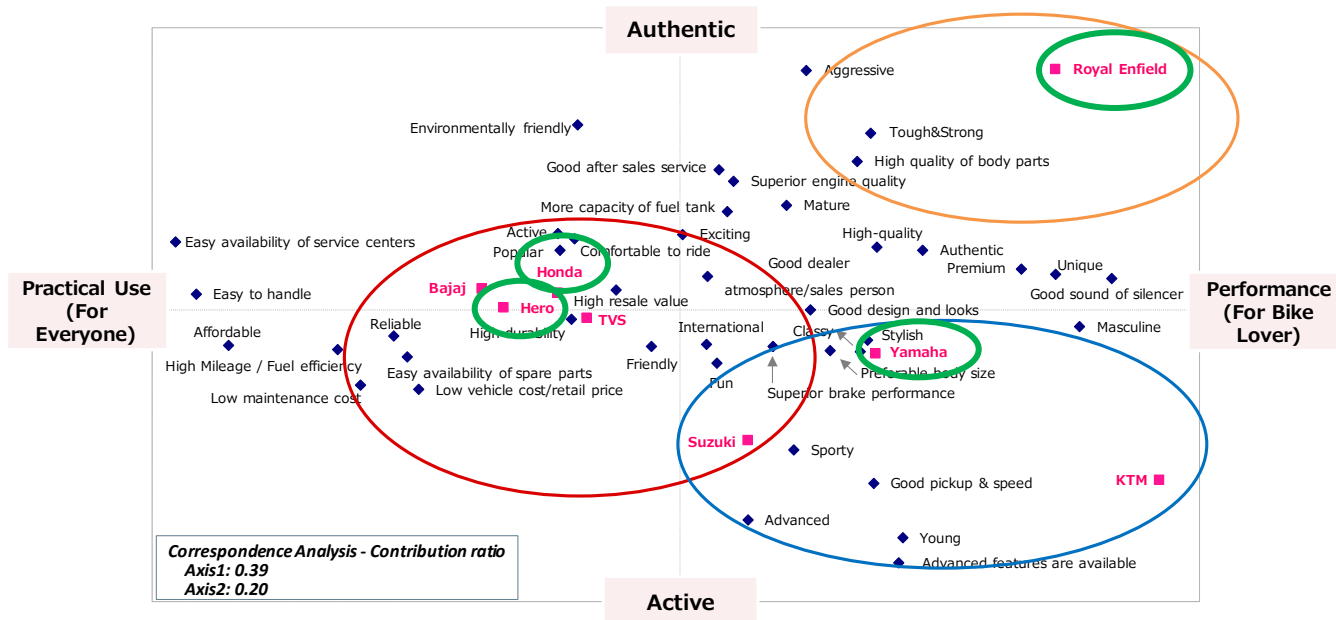
- Clarify the brand image and its source to understand how to 'Rank-up' from LIKERS to BONDS





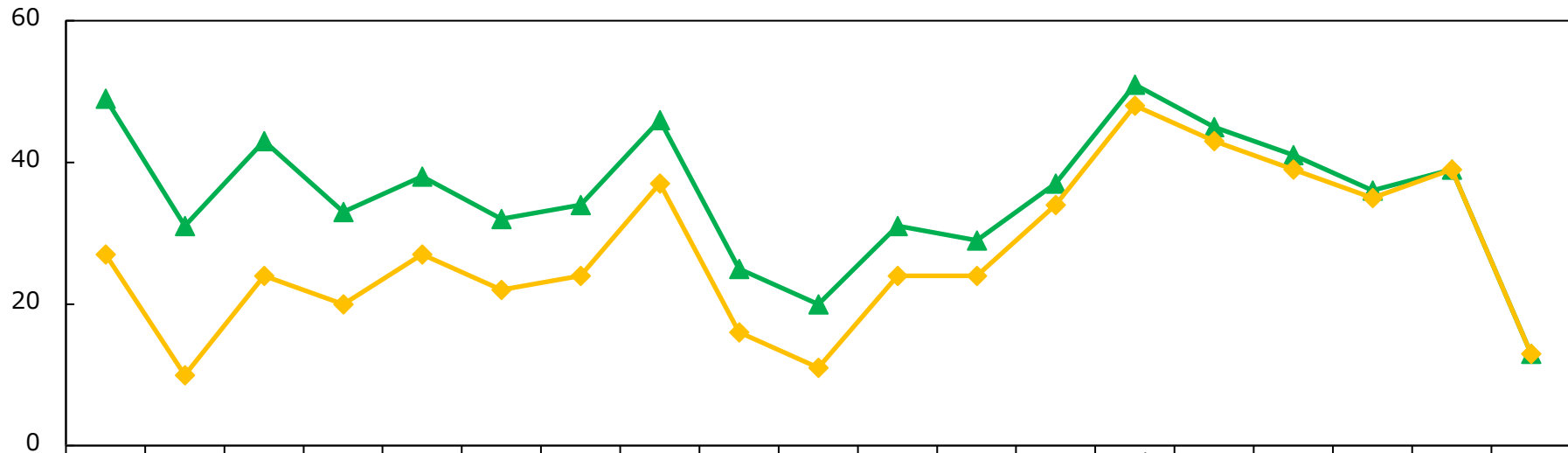
# Model for the Analysis

- From each of the key segments, the 4 brands below are picked up for detailed analysis.



# Key Brand Image for BONDS [Hero]

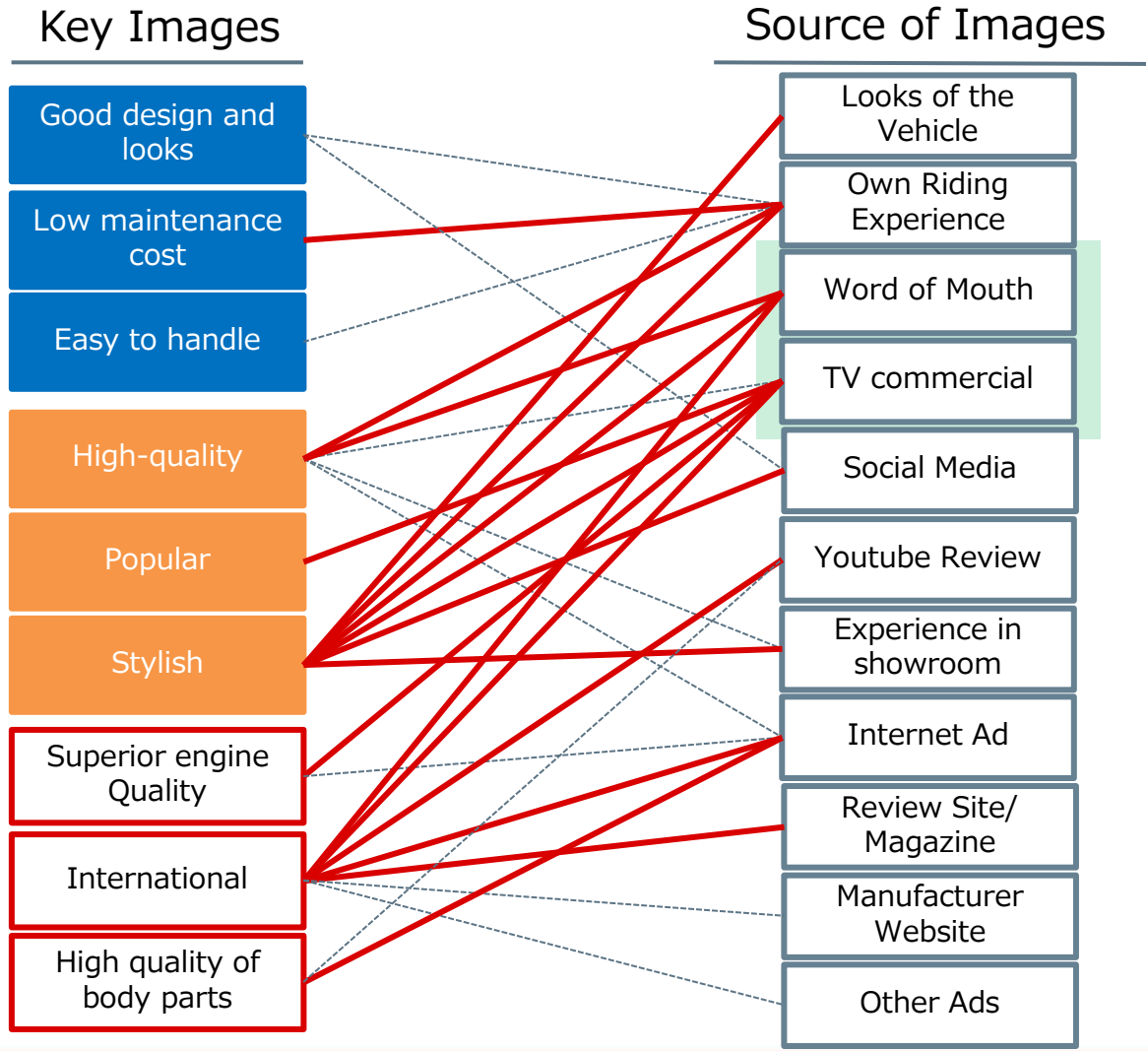
**Brand Image Comparison between BONDS and LIKERS (TOP 20 with larger gap)**



Sorted by Gap

	Superior engine quality	International	High quality of body parts	More capacity of fuel tank	Exciting	Easy availability of spare parts	Friendly	Easy availability of service centers	Classy	Unique	Mature	Aggressive	High resale value	High Mileage / Fuel efficiency	Stylish	Premium	Reliable	Advanced	Fun
—▲ BONDS (82)	49	31	43	33	38	32	34	46	25	20	31	29	37	51	45	41	36	39	13
—◆ LIKERS (41)	27	10	24	20	27	22	24	37	16	11	24	24	34	48	43	39	35	39	13
Gap (BONDS-LIKERS)	22	21	19	13	11	10	10	9	9	9	7	5	3	3	2	2	1	0	0

# Source of Key Brand Images [Hero]



## Key Images

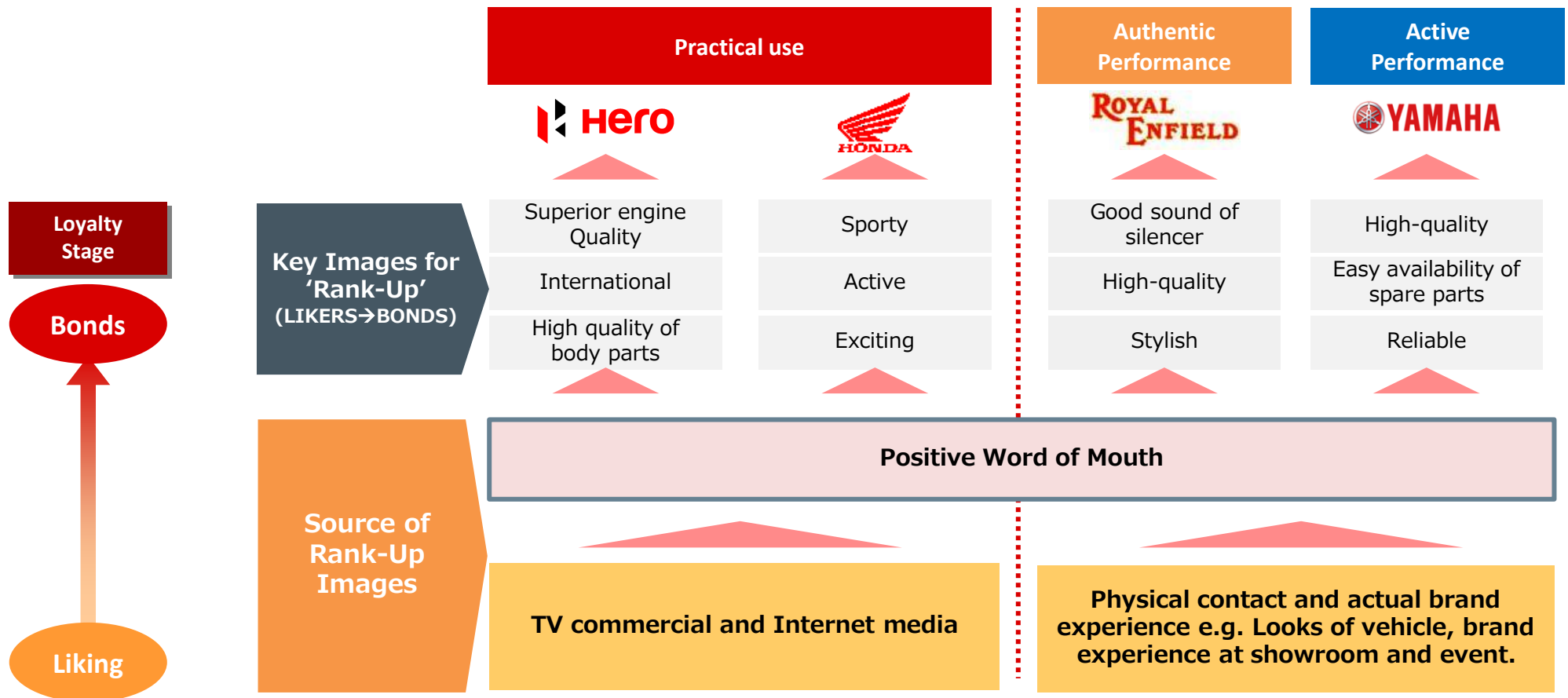
## Source of Images

- Functional Image Top 3
- Emotional Image Top 3
- Gap (BONDS - LIKERS) Top 3

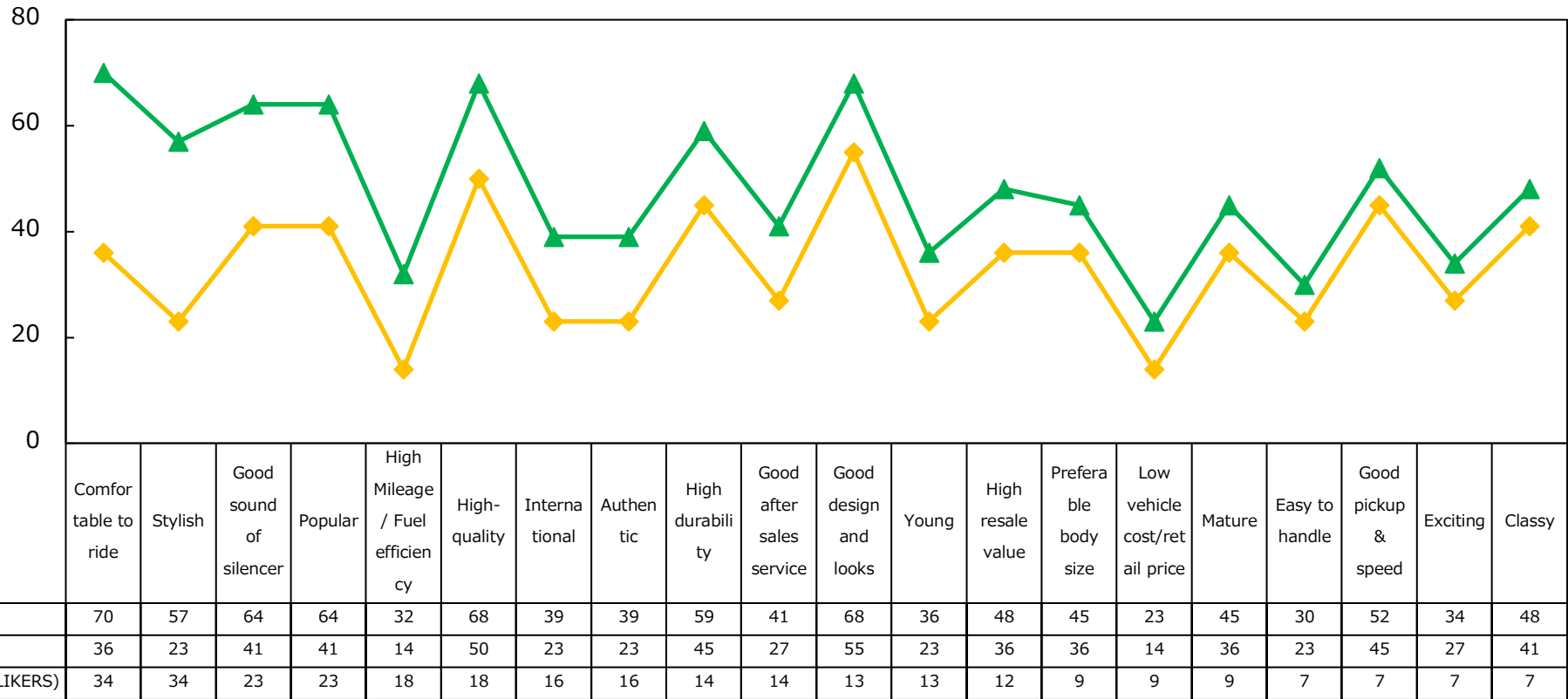
- Strong Relation
- Moderate Relation

# Summary – Key Images for ‘Rank-Up’ (LIKERS→BONDS)

- Each brand has different images to contribute to rank up from LIKERS to BONDS. To strengthen those images, WOM would have the biggest impact across all the brands.
- To generate positive WOM, TVC and internet media would be effective ways to penetrate key images for Practical use brands i.e. Hero and Honda while physical contact and actual brand experience would be key sources for Performance segments i.e. Royal Enfield and Yamaha.



# Key Brand Image for BONDS [Suzuki]

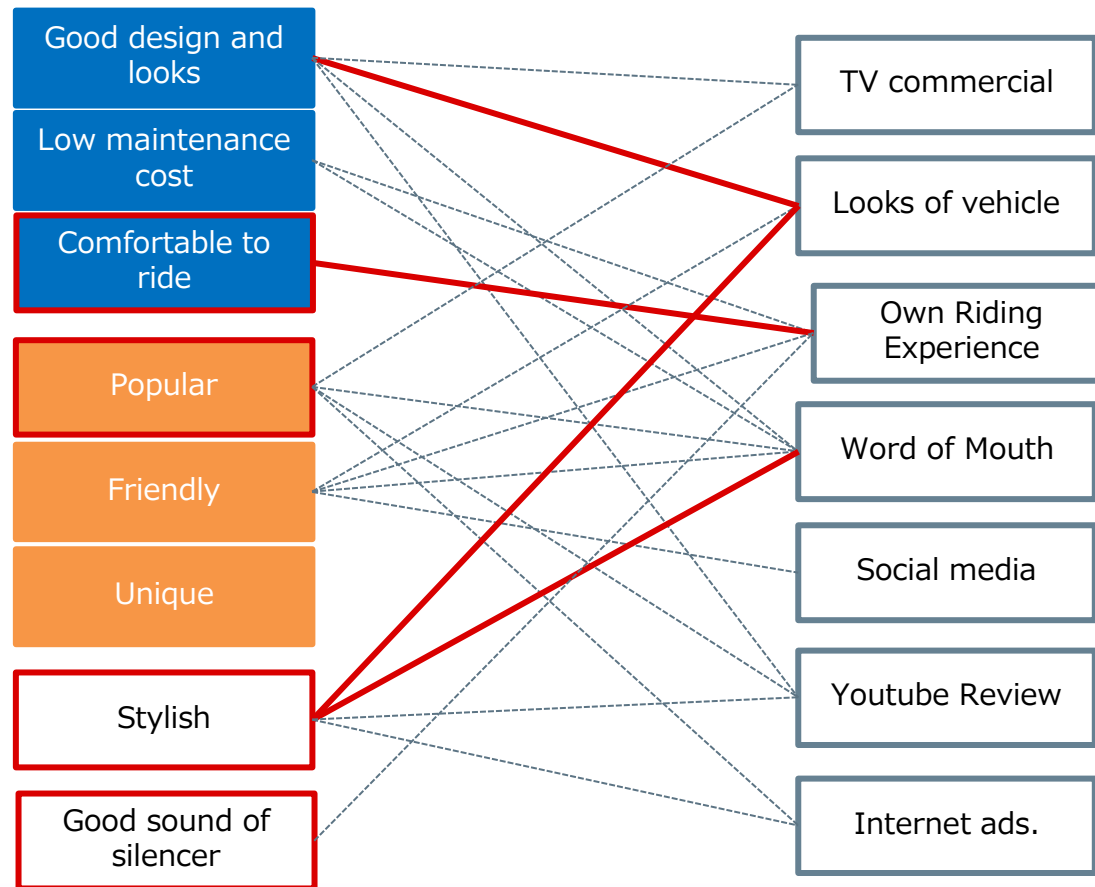


# Source of Key Brand Images [Suzuki]



## Key Images

## Source of Images



### Key Images

### Source of Images

Functional Image Top 3

Emotional Image Top 3

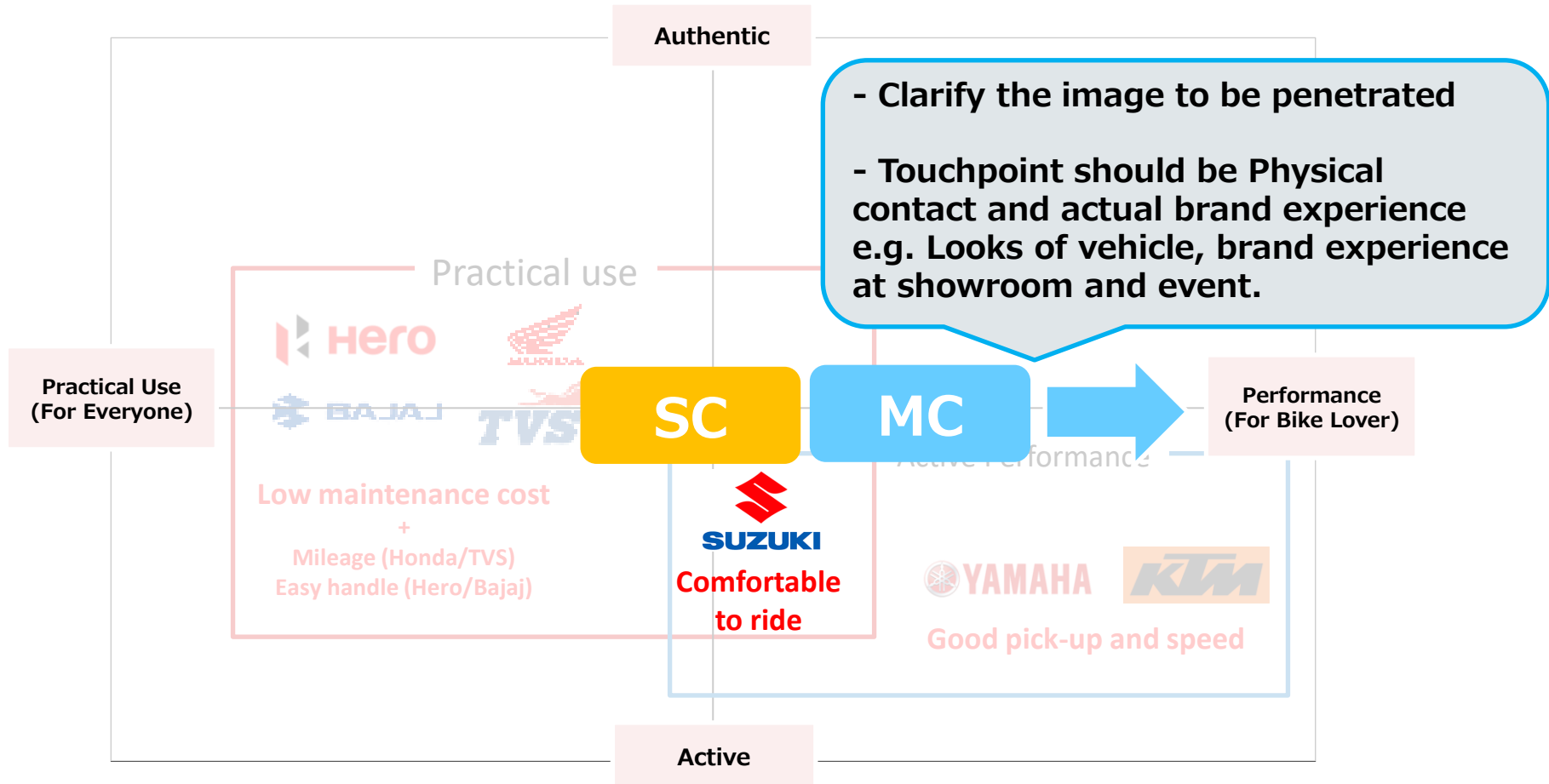
Gap (BONDS - LIKERS) Top 3

Strong Relation

Moderate Relation

# Summary – Market Segmentation

[Brand Perception Map with Key Brand Image]





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