

INDIA'S MOST **Reputed** 2017 AUTOMOBILE BRANDS



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Reputation – How and Why



Jayaprakash Pujari
Operations Head
BlueBytes

An Indian owning a car today is commonplace and nothing to write home about. However, certain impressions have remained from those days of old when owning an automobile was symbolic of wealth and high class. So, I wouldn't say the pride attached with the private ownership of cars is passé – far from it. Even with taxi aggregators aggressively promoting their brand of smart, chauffeur-assisted travel and the urban Gen Y corporate working class opting to travel in these taxis rather than considering owning cars like the generations before them did, I do not see the Indian Automobile Industry players suffering too much loss in sales.

Notably, contemporary brands that have their ears to the ground have already begun manufacturing cars that have features in sync with the taxi business, which are different in several small ways from cars meant for private use. This adaptability is not restricted just to these recent developments. Every insider of the industry knows how car manufacturers have to tweak their designs for the Indian market, with higher-mileage-lower-power adjustments and an easier suspension among the topmost things on the list of modifications Indian conditions demand. Seen through this lens, ours has always been a challenging market for those brands coming into our country that are used to wildly different conditions.

Having said that, though, brands operating in our country have more or less seen to it that their flags have a place to fly high on our lands. And the key lies in one word – Reputation. One may argue, obviously, that it takes years to build Reputation and that new players stand little chance against the reach of the big fish – the well-entrenched brands. The game of building Reputation is not one that can be won in a matter of a few years. And yet, once the Reputation is in place, everything else seems to follow suit. Case in point – Ambassador. Remember the time when owning an Ambassador used to be a sort of status symbol? The legacy created by the Indian brand stands to this day, and most consumers would willingly invest in the brand again, provided it made an offer that was hard to refuse. The brand still carries a legacy of reliability and strength.

Reputation, which is defined as the transmitted belief of a feeling of respect, begins from perception. This perception is largely influenced by the media, which is considered a reliable source of information for the reader. The India's Most Reputed Automobile Brands – 2017 Report is a one-of-a-kind study that highlights the Industry's perception in terms of both consumer perception and media analysis. The Report is the fifth initiative, an endeavor of BlueBytes and TRA Research, both nested under the Comniscient Group. Each company has a unique specialty – BlueBytes is focused on measuring the transmission of Respect as perceived via print media, while TRA measures consumer perception. The India's Most Reputed Mobile Phone Brands – 2016 Report is thus an attempt at bringing clarity into the Reputation of the Indian Automobile Industry.

A brand's self-actualization process is complete when it has attained the pinnacle of an unflagging Reputation. However, the climb toward this pinnacle is not easy to make. Perhaps it is time that organizations start thinking in terms of a Chief Reputation Officer, the custodian of Brand Reputation.

As we continue to embark on this journey, we would appreciate any comments, suggestions, and questions that would help us bring you an even better Report in the future. Feel free to write to us at reputation@bluebytes.info. We look forward to your valued opinion.

With Warm Regards,

Jayaprakash Pujari, Operations Head, BlueBytes

About BlueBytes

Founded in 2003, BlueBytes, a part of the Comniscient Group, is among India's leading Media-analytics companies with 9 city offices. Should the need arise, BlueBytes has the ability to quickly scale into 40 Indian cities. Since its launch, a growing number of smart communicators now consider BlueBytes an indispensable tool for tracking, managing, and organizing media coverage from print and online sources. BlueBytes News offers media monitoring and analysis services to over 250 clients and works closely with more than 30 PR agencies in India.

Drawing from a decade of expert media-monitoring experience and extensive client feedback, BlueBytes has based its business practice on the principles of Relevance, Accuracy, and Timeliness. These principles when combined create a sturdy foundation that ensures optimum client delivery.

BlueBytes has the know-how to not only understand and manage media monitoring from multi-lateral perspectives but also to leverage it. This, combined with our expertise in a variety of sectors and a well-rounded understanding of the various stakeholders—media, consumers, citizenry, government, activist groups, political parties, and bureaucracy, among others—gives BlueBytes an indubitable edge in the programs we undertake.

About TRA Research

TRA Research (formerly Trust Research Advisory), a part of the Comniscient Group, is a Brand Intelligence and Data Insights Company dedicated to understanding and analysing stakeholder behaviour through two globally acclaimed proprietary matrices of Brand Trust™ and Brand Attractiveness™. Over a decade of research has helped us decipher the numerous characteristics that constitute the foundations of a brand. TRA Research conducts a primary research with consumers and stakeholders to assist brands with their business decisions based on our insights on Consumer Behaviour.

TRA Research provides Competitive Intelligence Reports mined from more than 15 million data-points on brand intangibles of 20,000 brands and also provides bespoke studies based on the same matrices. TRA Research is also the publisher of 'The Brand Trust Report™' and of 'India's Most Attractive Brands™'. TRA has also ventured into mapping Educational Institutes on a much-needed factor of trust, based on our Brand Trust Matrix™. Recently, TRA Research also launched the Buying Propensity Index™, an economy index to measure the Transactional, Aspirational, and Environmental sentiments towards making buying decisions.

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01

**Success Accelerated – A Brief
Glance at the Automobile
Industry in India**

06-13

Success Accelerated – A Brief Glance at the Automobile Industry in India

Today, automobiles have become a core aspect of our lives on which all our day-to-day activities are centered. A car is almost like an extension of the human body, providing us swift and convenient mobility, and no one can deny that it is an indispensable asset for the modern human. The automobile industry we know and depend on today is not the offering of a single inventor or even a core group of them. It is the result of the collaboration and the coming together of the ideas of many geniuses who toiled and labored in circumstances and with infrastructure that were uncooperative, perhaps even regressive. It is no wonder then that over 100,000 patents are on file for the average, garden-variety motorcar you see zooming around on the road. Innovation, game-changing ideas that increased efficiency and reduced redundancies, and the Industrial Revolution have all played a crucial role in bringing the automobile industry to where it is today. But what's next, though? And what is the next big thing to look forward to for this sector?

The automotive industry in India has transformed significantly over the last two-and-a-half decades by continually innovating itself along with the changing requirements and markets. But such flexibility and adaptability wasn't always its forte. The 1970s – 90s saw India in a closed market facing challenges like a restrictive regulatory environment, high duties, limited supply, outdated auto models, high sales tax, and so on. Post liberalization, the Automobile Industry opened up significantly with delicensing, automatic approval for FDIs up to 100%, and the slow and steady influx of foreign players that not only brought with them industry know-how but the beginnings of the asset class – ably complemented by other sectors like Education, IT, and Real Estate, which grew alongside the Automobile Industry and fed from and into it. The industry has blossomed in India due to the immense demand (India is the sixth largest producer of automobiles in the world and manufactured 24 million vehicles in 2016), the parallel growth of the infrastructure of Tier 1 and Tier 2 cities, and a taxation structure that has allowed and even encouraged households to own more than one 4-wheeler. The Automobile sector, which saw a revival last year after two years of turbulence, is set to continue the momentum this year with demand picking up across all segments and genres of cars. Some industry insiders expected the Demonetization of 2016 to drastically affect the sector and grind it to a halt; however, with sales dipping a meager 19% across the Industry in Q3 2016, the industry is seen to have not been drastically hit by the cash crunch, and its long-term outlook is also going to be a positive one.

The Indian Automotive Industry employs about 19 million people and contributes a large 7.1% to India's GDP by volume. By 2026, it is expected to be the third largest automotive market by volume in the world. From these figures, it is clear that when it comes to this Industry, its smooth, holistic functioning is pivotal for the country's growth and crucial to the vision the current Government has planned for the nation.

Infrastructure

The rapid increase of economic activity over the last two decades has caused an escalation in the urban travel demand in the country, leading to an increase in the sale of automobiles, traffic congestion, parking space issues, and unchecked pollution. Smart solutions to alleviate parking hassles and environment-friendly vehicles are receiving their due attention these days. Government programs like the Smart Cities Mission (SCM) and the Atal Mission for Rejuvenation and Urban Transformation (AMRUT) consider parking as one of the core areas to develop an efficient and smart transportation structure in any city.

As a majority of the population of any city depends on transportation, having a functional infrastructure system is extremely essential. For infrastructural development to occur, though, the sector, the Government, and its consumers have to join forces. As we all know, nobody who is rushing to work in



Public Sector

1953

The Indian market is dominated by Hindustan Motors and their flagship vehicle, the Ambassador



1980-85

Beginning of the take-off phase for the Indian auto industry with the Government and the private sector coming together to start off automotive component manufacturing to meet the industry's rising needs

1960-80s



For the first time in the country, Japanese manufacturers begin to build cars and commercial vehicle factories in India

their 4-wheeler enjoys the prospect of spending 30 minutes idling in heavy traffic due to an under-construction flyover. However, it is those very same people who are going to have a smooth ride for years to come in a matter of two months, so a bit of cooperation and adjustment might not be too much to ask. And although a case can be made for better communication and greater transparency from those handling these infrastructure projects, the fact remains that a modicum of inconvenience is the by-product of a rapidly developing sector like Indian Infrastructure, which is turn is mission critical to the Automobile Industry.

“When King Solomon said there was a time and a place for everything, he had clearly not encountered the problem of parking his automobile”

— Bob Edwards

(Renowned American Broadcast Journalist)

Flipping the Green Switch

The second largest contributor of greenhouse gas emissions worldwide is transportation, which accounts for more than 25% of emissions globally; of this amount, passenger vehicles are responsible for a significant share. Moreover, this only seems to be increasing over the years as road transportation emissions has grown 30% globally since 2005, making it one of the most essential issues to concentrate on to fight global warming. To encourage the adoption of a greener auto sector in India, the Government has launched the Faster Adoption and Manufacturing of Hybrid and Electric Vehicles (FAME) scheme, which helps incentivize, develop, manufacture, and promote the hybrid/ electric vehicles market development and targets a market penetration of 6 – 7 million vehicles per year by 2020.

With the pressure of fossil fuels ramping up, green technologies are evolving as a viable power solution to overcome the ever-growing commuting demands. Without a shadow of a doubt, these alternatives are the way forward with regard to the best available options to reduce pollution in the country. India is working towards electric and hybrid cars, multiple battery technologies, hydrogen fuel cells, and new ways of generating CNG. With the introduction of CNG vehicles, the incentives that ride with it, and its cheaper cost to end consumers, the usage of CNG as an alternative source of fuel for transportation has increased considerably. Numerous auto players have been extensively working on this and spending on R&D to transition to a cleaner and greener option.

As with anything of this scale, the law- and policymakers play an instrumental part in encouraging the development of greener vehicles and to ensure that growth is maintained while keeping to current environmental standards, and although the major players who have their ears to the ground are well-equipped to lead this revolution, the major factor affecting its momentum is demand from the end

German Steven Lobbzoo builds the first commercially available satellite navigation system for cars

MARUTI UDYOG LTD

The alliance between Maruti and Suzuki is the first joint venture between an Indian company and a foreign one; this partnership would dominate the Indian automobile scene for nearly a quarter of a century

1985

1984



Maruti Udyog enters the passenger car segment in India; nearly all its peers at this time have disappeared from the market in the present day

1990



user, and logically, ground-level awareness. In a price-conscious economy like India, the shift towards greener drives would be slow unless it is spurred by impetus and mandates from the Center.

The lack of the widespread usage of electric vehicles can also be attributed to a degree to the higher acquisition costs. This situation will only phase down once the processes and structures supporting electric and hybrid vehicles catch up. For example, one of the prime factors would be to allocate charging stations at convenient locations. Secondly, reducing the time taken to charge the batteries fully would go a long way in the technology being taken up more rapidly. With the current power distribution systems and logistics, there just isn't the backbone infrastructure to support the adoption of a huge number of electric vehicles at this moment in time in any Tier 1, Tier 2, or Tier 3 city.

It is in these situations that charismatic, out-of-the-box-thinking brands like Tesla Motors could do a great deal of good to the Industry. If Tesla decides to be the first movers as far as electric cars are concerned in a country like India, acquiring one would exert an aspirational pull on target users. And when something like an electric car enters the aspirational fabric of the nation, there will be a large impetus to move towards a greener tomorrow.

Necessary parameters like population, traffic volume, the number of active electric vehicles, and various other variables need to be taken into consideration to roll out the use of electric vehicles in a big way, though. The power system too needs to be dependable and regulated to be integrated into the transportation structure seamlessly. The silver lining is that the push towards a greener transportation system is here to stay and its evidence can be found in the little things – several start-ups that are operating domestically, like EVI and Ather Energy (both of which mass-manufacture electric vehicles), have been established in the last decade to manufacture electric vehicles. Needless to mention, the resultant lower dependency on fossil fuels and decline in oil imports would lead to considerable monetary savings for the country's economy.

Fuelling the way forward

India is the only major vehicle producing region in the world that has not yet implemented the global Fuel Consumption Norms (FCN) as per the findings from Centre for Science and Environment (CSE). Though the norms were notified in 2015, the rules for compliance with those norms have only been proposed for implementation this year. The corporate average fuel consumption in 2017 is close to 5.2 liter/100 km and is targeted to be reduced by about 15% by 2022 – 23. This consequently triggers a demand for alternate options to be made available for a growing base of consumers looking out for safe, efficient, environment-friendly automobiles.

Changing Consumer Perceptions

With a wave of changes sweeping through the auto sector, changes in consumer perception aren't far behind. Consumers prefer instant, convenient, comfortable modes of travel. As travelling in urban areas of the country these days is synonymous with traffic congestion, it leads to longer commuting



1998-99

The Automobile Industry produces a total of 4.5 million vehicles and reaches a turnover of Rs. 42,000 crores (USD 104 billion), making India the fifth largest auto producer among emerging markets

The Government introduces "Bharat Stage" to reduce vehicular pollution; these standards are based on stringent norms that set limits for the release of pollutants from equipments using internal combustion engines



2003

Martin Eberhard and Marc Tarpenning found Tesla to build electrical cars in Silicon Valley, USA

2000



hours, thereby reducing the comfort of travel. With various services (transport, food, medicine, retail, and so on) available at the click of a button and the push for a Digital India really hitting home, TransportTech hasn't stayed far behind and aggregators like Uber and Ola have not only bled traditional taxis and auto-rickshaws with a million cuts but have become household names overnight. An interesting tidbit is that India is the second largest market for Uber, and that too just 3 years into the country.

Logically proceeding from this, a slightly worrying trend developing among the Indian Automobile Industry's players is how the Industry's urban end users have begun reconsidering their purchasing priorities given that they have begun realizing that they could rather enjoy the ride to and from their destinations at the same cost of owning a car without worrying about paying the maintenance bills or going mad at traffic snarls or paying for fuel.

As we drive down the freeways, we see the new cars, but not the massive new-car loans that enslave their drivers to the banks.

— Gerry Spence
(Senior American Lawyer and Thinker)

The Government

The Automobile Sector, under the Make in India initiative, significantly contributes to the country's employment, its GDP, and overall incoming FDI corpus. A Government-organized primary research found that, as of 2016, the Indian Automobile Industry employed directly or indirectly a total of 19 million people, and there is employment opportunity for 13 persons per truck, 6 persons per car, and 4 per three-wheeler reported.

The sector plays such an instrumental part in shaping the country's economy that it needs to be constantly oiled through Government policies and regulations to ensure it smooth running. The incorporation of beneficial policies like the easing of excise duties on parts, the NEMMP 2020, and FAME help greatly in embellishing the sector and keeping new foreign players interested to invest in the country. Moreover, one can clearly see the Government is strongly focusing on innovation and R&D and has put favorable policies in place to make the Indian Auto Industry an ideal one.

Urban area regulations like one-vehicle-per-family, which has been suggested by the Bombay High Court in Sept 2016, will help in battling road congestion and pollution. Further, the ban of older vehicles in a few highly congested regions and vehicle scrappage policies will facilitate the Center's plan to make India a much cleaner place.



Jim Gorde
Principal Correspondent
Car India

REP-OPINION

India is one of the fastest growing nations when it comes to the Automobile Industry. When one sees the sheer number of cars plying on the roads today, it is enough to necessitate a proper forward-thinking plan for infrastructure and facilities to accommodate it.

While we have no shortage of vehicle buyers, there are several shortcomings when it comes to their actual use. The risk of using vehicles on the road has gone up several-fold and the lack of administration and enforcement sees this risk rise up worryingly with each passing day. What can we do to change this? Well, there are several ways:

Consideration

Safety is paramount. And road-safety awareness is severely lacking among Indians. We have several thousand rules and regulations but their enforcement is next to zero. Where I live, in Pune, traffic signals are merely part of the scenery and traffic police are, more often than not, simply bystanders attempting to control a deluge of lawbreakers every other second. This is the result of not just inadequate and uncommitted law enforcers, but also a lack of awareness and sheer inconsideration on the part of road-users. To save one second of their own time, they waste several minutes of many others. There is no sense in putting up massive banners with a lot of text. Those who need to follow those rules are incapable of reading the language. Moreover, when breaking the law is seen as a matter of pride, there is something severely wrong at the grassroots level.

Solution – Simple banners or awareness slogans in regional languages at all major junctions and stricter riding/driving tests before awarding a license.

Setting Examples

This is for the parents and the Law alike. Children will follow your example, not your advice. If, as a parent, one sees it fit to go the wrong side of the road to avoid travelling 100 meters to a U-turn, and then expect correct-moving traffic to make way for them, they are not just putting their own life and that of their child(ren) at risk, they also put the lives of other road-users at risk. It's the same with school vans in many cities. These very kids will grow up to do the same thing. The number of fatalities has gone up not just due to the lack of wearing proper safety gear, in this case, simply a helmet, but also utter disregard for the rules. It is exponentially pathetic to see policemen without helmets or safety belts, as the case may be, going down the wrong way or breaking a red light. Police officers are not above the Law!

Solution – Stricter law enforcement. Ensure cops do the job they are paid to.

Forward Thinking

Infrastructure always seems to be developed without adequate planning and, worse, only keeping the present in mind. If a certain major junction sees 50,000 vehicles in a couple of hours, it should be ready to handle twice that figure in the very near future. Furthermore, several flyovers and underpasses are developed where a major portion of the road is four-lane or even six-lane, and then it culminates into a narrow junction that bottles up several lanes into one solitary lane. Can't the developers see where their flyover is going to end? Why not plan appropriately in the first place? Big plans need big spaces, big commitment, and foresight to execute well. If one of those elements goes missing, it will be nothing but a massive failure. And there are several examples of those around. Before we forget, pedestrians are road-users too, and safe, vehicle-free footpaths are mandatory.

Solution – Involve specialized contractors from Germany or overseas, where safety, precision, and consistency are not taken lightly. When spending a fortune, spend it right.

Indian car manufacturer Tata Motors buys Jaguar; notably, the cheapest commercially sold car in India, Tata Nano, is launched at the 9th Delhi Annual Auto Expo as well



2010

India becomes the largest manufacturer of tractors, the second largest manufacturer of two wheelers, and the fifth largest manufacturer of commercial vehicles in the world

2008



India becomes the second fastest growing car market after China; 2010 also marks the year India emulated its previous year's performance and became the third largest exporter of cars in Asia

2012



"Design in India" is as important as "Make in India"

— **Narendra Modi**
(India Prime Minister)

What the future holds

The shift from an industrial to a knowledge-based society has helped in enhancing and transforming the economy. For the automotive sector, especially, it opens portals to new opportunities and challenges. While heading towards a greener path is a priority for countries today, infrastructural challenges also play an important role in the planning process. Ensuring a more comfortable and safer vehicle while also using resources efficiently is a major focus area for auto companies. The automobile industry has come a long way from being essentially designed only for transport to transforming into something more diverse like being designed to suit consumer convenience, while accomplishing multiple breakthroughs on the path.

Automobile companies are dedicated to testing new technologies and concepts to help transform the potential of automobiles and consequently help in transforming transportation too. The future of automobiles is seen to be a more connected one, with importance being given to creating a fully digitized vehicle with Wi-Fi, applications, vehicle-to-vehicle communications, real-time location services, routing based on traffic conditions, as well as web links to facilitate vehicular diagnostics and repairs. As of right now, though, self-driven automobiles takes the cake as far as popular media attention and the Industry's futuristic push goes.

Although smartcars are in the nascent stage and are at least 5 – 10 years away from making inroads in India, from all present-day reports and intelligence, they will dominate the roads starting as early as 2025. What is dead certain is the fact that the sector is sure to get highly competitive given the focus on smartcars and intelligent technology on wheels.

The technology needed will not be easy to produce and incorporate for most contemporary automakers; however, it is something that would be extremely essential to acquire. Here is where companies like Google and Apple have a competitive advantage. Large players have already begun buying SmartTech from these technology giants' proprietary portfolios. Auto companies are also collaborating with Apple to incorporate Siri (its iOS voice-enabled assistant) into their vehicles to create a virtual personal assistant to assist with routes, traffic information, and scheduling. Also, the increasing demand for original equipment manufacturers (OEMs) cannot be ignored and these companies will have a substantial impact and role to play in the auto sector in the coming years.

The concept of completely autonomous automobiles may be too futuristic to embrace in the



2014

Apple unveils its CarPlay iOS-device integration platform at the Geneva Auto Show; Google follows a few months later with Android Auto

Tata Motors receives an order worth Rs. 1,400 cr, constituting logistics vehicles, LAVs, ATVs, and 6x6 trucks to the security forces, the single largest contract to be awarded to an Indian manufacturer by the Army



2016

The Government of India aims to make automobile manufacturing one of the key drivers for the "Make in India" initiative

2015-16

TATA MOTORS

present, but the path to accomplishing it would be a thrilling experience for automakers, and is something a not insignificant number of engineers have been commissioned to produce and perfect.

Conclusion

Looking back at where it all began, the Indian Automobile Industry has come a long way and seen some phenomenal changes, and yet there is much further for it to go. However, the question is how amenable will the consumer be to these developing changes. Although the Indian consumer is more adaptable and understanding than most global markets, Industry players would be wise to ensure the broad tenets of any venture that succeeds in India – niche appeal, affordability, trustworthiness, class, style, and a glowing reputation. Intrinsically, the Industry is leaning more and more towards R&D, and extrinsically, the favorable Governmental moves and the various sectors aiding its growth will ensure the Industry’s best days are yet to come. The only question is, how many of the contemporary players today will survive to see these glory days? Will they wilt under the pressure or will their Reputation bloom, only time will tell.





02

Reputation Revving – Breaking Down the Intangibles of the Automobile Industry

Reputation Revving – Breaking Down the Intangibles of the Automobile Industry

Reputation is a social asset – capital built on account of an individual’s interaction with society in general and emerging as a result of the society’s general regard for ‘value’, in whatever terms that particular society or group chooses to define it. Reputation builds two important social currencies, *Social Worth* and *Social Inclusion* – the two most important drivers of social status. Among humans, this is part of the *Social Dominance axis*, which on one side has Reputation as an end state that all humans seek, and at its other end has Achievement.

Social Dominance can be observed at its primary state in animals, with different species adopting different structures to show dominance within the group. Many baboon species comprise of a single dominant male with a harem consisting of females and their young. The dominant males and even females assert their rank by directly showing physical dominance over others through threats, aggression, biting, chasing, and fighting. Other species do it differently; for example, grey wolf pack members value ‘experience’ of the individual in the group, and age helps grey wolves reach the top of the pack ladder. Apart from several ‘social gifts’ the group offers to dominant members, the direct benefits of this social dominance in animals is greater availability of resources and a better shot at reproducing.

It is no different for brands, and the *Social Dominance Axis* for animals translates into a *Brand Dominance Axis* for brands, with *Brand Reputation* and *Brand Achievement* as its two ends. Apart from peer group benefits like the status and stature of the brand, the *Social Capital* resulting from *Brand Reputation* has direct implications on the brand’s economic capital. This ‘appropriate regard of value’ directly results into better associations, partnerships, employees, terms of trade, and even cost of finance. Bigger pay packages for students passing out of reputed education institutes is well known and documented. Brands, knowingly or unknowingly, seek to enhance their *Brand Dominance* through everything they do, in a way enhancing their ‘pecking order’ through many direct actions and in other subtle and subconscious ways. Since in the Automobile sector brands compete for clients from the same basket, the resultant pecking order becomes a key to the survival and growth of brands.

Reputation is based on the attitude of Respect exuded by the Automobile brand – revealed in terms of appropriate regard of “value”. The concept of value may differ depending on different groups and different situations and is based on varied aspects. Broken down, value is born out of traits such as ability, action, longevity, pedigree, knowledge, performance, and a strong commitment to values. Value is whatever the brand stakeholders consider beneficial in general, what the brand group considers very important in specific, and something that is usually not easy to achieve. In the Automobile Sector, this could be exemplified by aspects like the consumers’ high regard for a particular brand in all the genres that it operates in, a solid mindshare for the cars they manufacture, and so on. In human societies, we always look to learn from those we respect. Be it elders, society leaders, or achievers; all those who we aspire to be become our inadvertent teachers. In the brand world too, respected brands become inadvertent teachers to aspiring brands. However, it is important to note the context of culture in Respect – what is respected in one culture may be anathema in another; normal becomes abnormal when we switch the cultural lens.

Reputation (good or bad) is a measure of the effectiveness of transmitted belief in the relevant community about attitudes showcasing Respect. That is, when attitudes of Respect towards a brand gets transmitted through different sensory experiences – tactile, vicarious, imagined, or cognitive. The informed network of transmitters of the brand’s Respect include all its stakeholders – employees, partners, investors, thought-leaders in the category, followers of the brand, and most importantly, the media. This transmitted belief of Respect reaches out like a wireless signal and the range of

its transmission depends on the power of the Reputation signal. Reputation is also intrinsically valuable because the transmitters and endorsers also risk their own reputation in the process of the endorsement. Reputation is the net result of the Respect score of a brand and the strength of its transmission; in the case of this report, the media perception score.

Reputation hinges on audience perceptions and is very sensitive to changes in attitude, behavior, and action. Reputation can be seen as a tradable medium of exchange, a currency that the brand can earn through positive action, and sometimes lose due to inconsistent behavior, wrong communication, or incorrect action. Based on overt and not-so-obvious actions of the brand, Reputation has to be consistently maintained, monitored, and enhanced.

Reputation is a key intangible asset, and stakeholders constantly recalibrate it based on the actions of the brand. The reason that Reputation is additionally important is that even a little loss or negative Reputation can have a disproportionate dip in the overall Reputation, often having long-term impact on the Reputation health of an Automobile brand, called here the *Brand Rep Score*. Perceived or real failures, brand misdemeanors, management ineptitude, and wrong strategies can all be severely detrimental to a brand's Reputation. Despite it being so obvious, the conduct of leaders of brands in trouble have many times shown a lack of consideration, sometimes inappropriate or inadequate communication, the occasional absence of empathy, or sheer non-acceptance of full responsibility, which has further pulled down the Reputation of the brand at a time when they should be attempting to buttress it. Such wrong action—and in some cases, inaction—can be the Achilles Heel for brands, leaving lasting negative impact on its Reputation.

Reputed brands have a following of believers, and therefore carry in them the potential to become thought-leaders in their industry. Most often, what is said and done by reputed brands is emulated by others, giving such brands the power to hold sway over others. *Reputation Capital* is among the most important intangibles that a brand must attempt to create and sustain, for this one asset has the ability to build all other assets for a brand.



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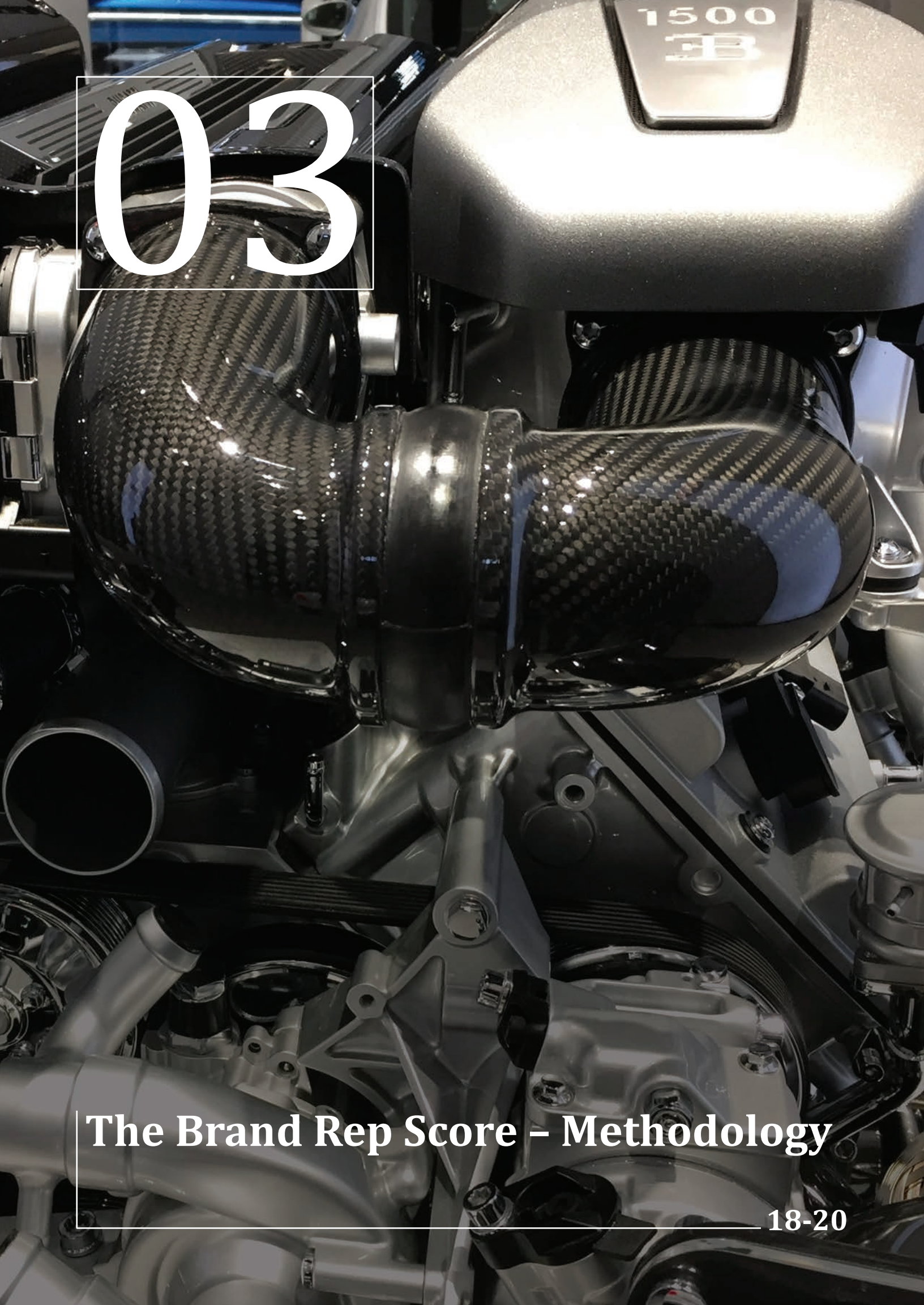
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A detailed close-up photograph of a motorcycle engine. The focus is on the intake system, featuring two large, polished carbon fiber air filters with a distinct woven texture. These filters are connected to a central intake manifold. Above the filters, a silver valve cover is visible, embossed with the number '1500' and the 'CB' logo. The engine's metallic components, including the cylinder head and various pipes, are shown in a clean, well-maintained state. The lighting is dramatic, highlighting the textures and metallic surfaces.

03

The Brand Rep Score – Methodology

18-20

The Brand Rep Score – Methodology

In order to define the study, an understanding of the concept of Reputation is important. However, to be able to measure such an intangible proves cumbersome and the task of defining it in a manner so as to make the analysis easy proves most significant. For our study, we have considered this definition of Reputation – **Reputation is a measure of the effectiveness of transmitted belief about attitudes showcasing Respect.** In measuring Reputation, we consider both aspects of the definition – the attitudes of Respect as understood by the consumers and the media’s carriage and transmission of the brand’s respect. Media is the ideal representation of the transmission value, in a way, since it acts like a sieve, segregating the chaff, and also because it stakes its own reputation on the news it carries – scrutinising the news for its truthfulness, authenticity, and fairness. In our information-saturated society, we have restricted our analysis to print media as the main transmitter. There are two major reasons for this. Firstly, print media has a very strong impact on audiences, probably because of its habit-forming and tactile nature. Secondly, print publications are still considered a highly trusted source of information. Consumers are more likely to trust what they read in print than what they read online or see on television. We have used print media articles as the lead source of transmission in this study for their triple role as news transmitters, auditors, and carriers.

Within the Automobile industry, 42 brands that have measurable media coverage were selected for the study. BlueBytes tracked all the brands’ news in all the major English and Hindi print media (newspapers and magazines) across 9 cities as a representative of the news across all publications. A total of close to 50,000 articles related to different Automobile brands were captured in the period between Feb 1, 2016, to Jan 31, 2017. The initial part of the compilation exercise included software coding and mining the large amounts of quantitative data. This was followed by a qualification procedure carried about by 12 BlueBytes researchers over 3 months. The completion of these two stages alone accounted for more than 10,000 man-hours of compilation and research. All articles were randomly distributed between the researchers for qualification. To further maintain consistency, an independent team validated each ‘marking’. All financial news was considered for the study.

Measuring the *Brand Rep Score*

The formula for the *Brand Reputation Score (Brand Rep Score)* is based on *Media Perception* and *Consumer Perception*.

Media Perception

The first part of the Media Perception Score is Visibility. This is based on whether the brand name appeared in the headline or whether its picture / logo / product was present alongside the article; the circulation of the publication in which the article was published; size of the article in sq. cm; and whether the mention of the brand in the article was *Direct* (only on the Automobile brand being considered), *Primary* (another brand or brands were mentioned along with the Automobile brand being evaluated), *Secondary* (the brand being considered took secondary importance), or *Reference* (a mere mention of the brand). This part of the *Media Perception Score* is almost entirely quantifiable.

$$\text{Visibility Score} = \text{Size of Article} \times \text{Circulation of Publication} \times \text{Total No. of Articles} \times \text{Media Branding} \times \text{Dominance}$$

(Where, *Dominance*: Direct = 100%, Primary = 75%, Secondary = 25%, Reference = 5%)

The second part of the *Perception Score* is *Tonality* – this is measured on a 3-point scale (*Positive*, *Neutral*, and *Negative*) and is an essential quality aspect of the *Perception Score*. Furthermore, what matters more is the tonality of the brand with respect to the industry it is a part of. Thus, BlueBytes

calculated the relative positive, neutral, and negative articles of a particular brand as a share of all the articles published about the industry. This was then converted to a weighted *Tonality* by adding the appropriate weights for each. Positive tonality was given +1.5 weightage, neutral tonality was given +1, and negative tonality was given -2; the latter due to the larger impact of negative media articles on brand perception. Finally, a *Media Perception Score* was calculated for each brand.

$$\text{Relative Tonality} = \left\{ \left[1.5 \times \text{Positive Relative Tonality} \right] + \left[1 \times \text{Neutral Relative Tonality} \right] + \left[(-2) \times \text{Negative Relative Tonality} \right] \right\} / 4.5$$

$$\text{Media Perception Score} = \text{Visibility Score} \times \text{Relative Tonality}$$

Consumer Perception

In addition to media analysis, the consumers' perception was also studied. This part of the analysis was contributed by TRA Research, which interviewed 2,500 'consumer-influencers' on the aspect of *Commanding Respect*. A *Respect Score* for each brand was then calculated using the Indian Statistical Institute (ISI) approved proprietary Trust Matrix™. However, not all Automobile brands were recalled by consumers in the survey. This challenge was overcome by the addition of the Average Industry Respect Score to individual Automobile brands' Respect Scores. The reputation of a brand, after all, is closely tied with the reputation of the parent industry.

The final *Brand Rep Score* was calculated as a simple multiplication of the *Perception Score* and the *Respect Score*, since media strongly influences consumer perception and acts like a multiplier. This score was calculated for each Automobile brand.

The formula for the *Brand Rep Score* is worked out as follows:

$$\text{Brand Rep Score} = \text{Media Perception Score} \times \text{Respect Score}$$

Who is a Consumer-Influencer?

TRA Research, as part of its annual countrywide study "The Brand Trust Report", delves into the Trust Behaviours of the "consumer-influencer", the 10% who impact the other 90% of consumers significantly. This category of respondents is easy to define but quite difficult to pin-point or access – they are busier than normal, and also less approachable because of their active profiles. TRA conducted pilot studies to pin-point this particular target group and came to the conclusion that while all categories make purchase decisions, the level of engagement of salaried persons with other people was much higher than these other categories, especially if they were in the higher salary bracket among their peers.

Some important criteria for consumer-influencers are:

- Male:Female Ratio – 80:20
 - Age Criterion – 21 to 50 years
 - SEC – A/B
 - Monthly salary income > Rs. 20,000
 - Not more than 15 interviews to be conducted in any one organization across its office in India
 - Must be employed in an organization having more than 200 employees across branches (pan-India)
- OR
- Must be employed in an organization having more than annual Rs. 50 Crore turnover



Renuka Kirpalani

Editor,
Autocar Show

REP-OPINION

While the Automobile Industry in India has grown exponentially, bringing in the latest cars, the Indian Infrastructure system has lagged way behind, often preventing the availability of newer technologies. When one considers infrastructure, the first thing that comes to mind is the abysmal state of our roads. While the kilometers are increasing, quality remains poor. The roads clearly lack markings, the signage is often non-existent, and then the quality of the tarmac or concrete itself is really poor. It's a known fact that most cars come to India with a special suspension package to deal with our road conditions; this often changes the way the car rides. Advanced safety systems often do not make it to India, because the radar frequencies that are needed for them to function on are not being sanctioned to the automotive industry, and even if they were, the lack of marking and signage would make the systems redundant. While the rest of the world is attempting to tackle pollution and a cleaner environment with Hybrids and EVs, India lacks the policy to make these cars viable. It also lacks the requisite infrastructure.

The hurdle to a smoother travel experience is a complete lack of infrastructure all around. It begins with the quality of road that is laid out. This needs to be strictly monitored. Consider the fact that, if a motorist kills someone, it is a criminal offence. Similarly, should it not be a criminal offence if a road contractor builds a poor section of road that leads to the death of motorists?? The system has been lax in quality control and the rot has spread so far that correcting it is now a tall order. India is completely capable of constructing quality roads as we have seen in some pockets. Not only will it reduce accidents, it will also reduce wear and tear on vehicles and improve the entire travel experience.

Markings and signage are also important, as it would help facilitate manufacturers bringing in advanced safety systems that depend on clear lanes being marked and proper road signs. We have often seen people riding the wrong way on a highway; this is because when roads are built, not enough exits are considered. Barriers are also not made for the high-speed roads. Planning is critical when constructing roads and that too with an eye on the future development of the areas around. The vision should not be to resolve a current problem, but to provide a long-lasting transportation solution.

Cities are choked, because roads are consistently built to resolve a current traffic issue and not to solve the growing needs. In every city, there should be a committee that oversees "future" infrastructure demands. Dual carriageways, interchange junctions, and even underpasses are solutions to clearing the traffic woes. While metros are constructed, the attention to the constriction of current roads is ignored, leading to additional problems. Here again one sees the lack of clear vision and planning. This is the core problem of all the infrastructure demands in this country, and if addressed, the rest would all fall into place.

Moving to the need for infrastructure on cleaner fuel, while we have advanced steadily in this regard, we are still way behind global norms. Also, the roll out of policy has been inconsistent across the country, making it difficult for automotive manufacturers to provide cleaner vehicles across the board. The vision for Bharat Stage VI needs to be clear. It needs to be implemented countrywide, the right grade of fuel needs to be available in every petrol pump, and the fuel quality needs to be strictly monitored with high penalties for offenders.

In conclusion, this country needs clear vision, meticulous planning, quality control and strict monitoring of processes to attain the right level of infrastructure to meet its growing demands.



04

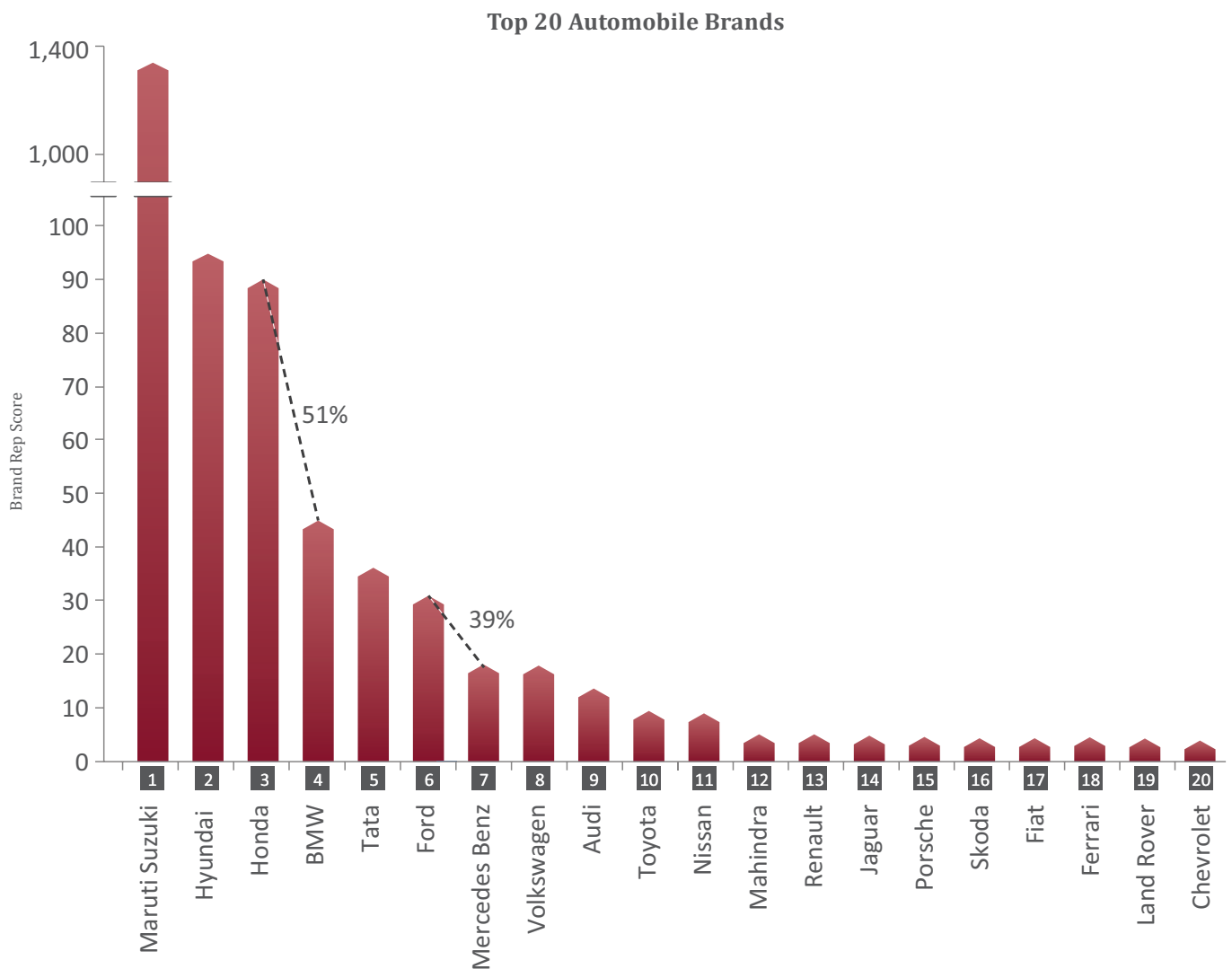
**Brand Rep Score Workings and
Extended Listings**

Brand Rep Score Workings and Extended Listings

Ranking first as India's Most Reputed Automobile Brand in 2017 is India's largest automobile company Maruti Suzuki. In the period from February 1, 2016, to January 31, 2017, Maruti Suzuki had the highest BrandRep Score, moving it to the number one spot in the Reputation analysis. Ranked second in the Most Reputed Automobile Brands list is South Korea's Hyundai Motors, which had a slew of launches, the most successful being Creta and the Elite i20, followed by Honda ranked third in BrandRep Score.

The fourth position is held by one of the best-selling luxury automakers in the world, Bayerische Motoren Werke AG, better known under its abbreviation, BMW. Tata Motors, the second Indian automobile manufacturer to feature among the top ten in the list ranks as the fifth Most Reputed Automobile Brand in the country.

Ford, the name that follows the surname of the auto industry's grand-daddy, is the only brand out of the Americas to feature in the top 10 list of India's Most Reputed Automobile Brands for the year 2017.

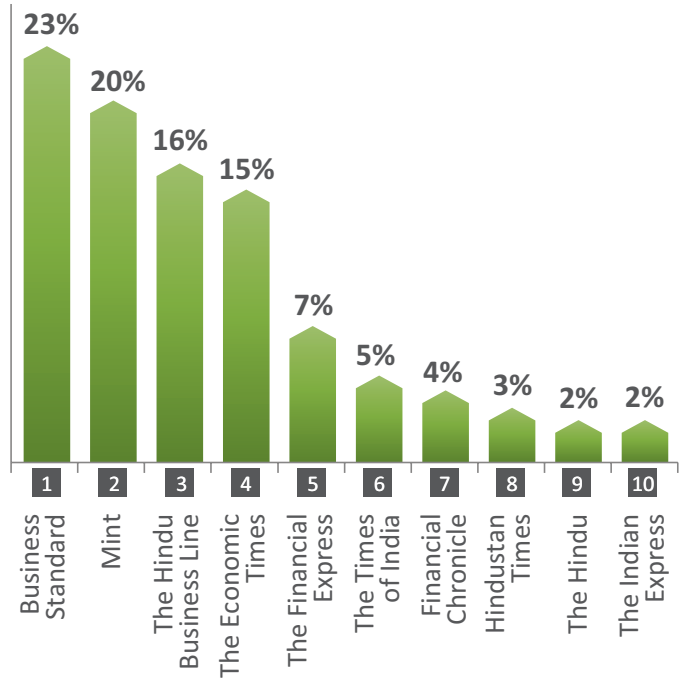


Three German automakers line up consecutively in the seventh, eighth, and ninth spots respectively; these are Mercedes Benz, Volkswagen, and Audi in that order. What is clearly visible from this is the influence that European, and especially German, brands have in the Indian automobile sphere. The top ten listings is rounded off by yet another Japanese automotive manufacturer, Toyota, which is in the tenth spot.

Top 20 Influencers of Automobile Industry (As per the volume of stories on the Automobile industry)

1	Ajay Modi	Business Standard
2	Murali Gopalan	The Hindu Business Line
3	Swaraj Baggonkar	Business Standard
4	Amrit Raj	Mint
5	Ketan Thakkar	The Economic Times
6	Shally Seth Mohile	Mint
7	Vikram Chaudhary	The Financial Express
8	S Muralidhar	The Hindu Business Line
9	Pankaj Doval	The Times of India
10	Malyaban Ghosh	The Financial Express
11	Sharmistha Mukherjee	The Economic Times
12	Michael Gonsalves	Financial Chronicle
13	Parvatha Vardhini C	The Hindu Business Line
14	S Ronendra Singh	The Hindu Business Line
15	Sunny Sen	Hindustan Times
16	Shaikh Zoab Saleem	The Financial Express
17	Ashutosh Shyam	The Economic Times
18	Dev Chatterjee	Business Standard
19	Ravi Rajan Prasad	Financial Chronicle
20	Krishna Kant	Business Standard

Most Automobile-Industry-Friendly Publishers



Financial dailies ruled the roost as far as the highest percentage share of media coverage related to the Automobile Industry was concerned. The Business Standard, Mint, The Hindu Business Line, The Economic Times, and The Financial Express dominated the Industry's coverage share in the period of our analysis. These were calculated as a percentage of the total number of media coverages in Print Media.



What do the following brands have in common?



They have been vested with the



by your votes.



Use our insights to build a lasting relationship with your stakeholders:

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A
COMNISCIENT
GROUP
COMPANY



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India's Most Reputed Automobile Brands

Maruti Suzuki

BRAND REP RANK | **01**

Of the total coverage received by the Automobile industry in India, Maruti Suzuki had a significant share of 16%, largely accounting for its first rank in the listings. Of its share of news, about 35.5% was positive in tonality, 58.5% was neutral and 6% was negative. In terms of the industry, its share of positive and neutral news was the highest at 17% and 28% respectively.

Media Perception



Positive

₹ 399 Cr

- 7 Maruti Suzuki cars make it to the top 10 list of 2016
- Maruti Suzuki's Gujarat plant to begin operations next year



Neutral

₹ 107.1 Cr

- Maruti Suzuki to hike car prices due to "green" tax
- Maruti Suzuki temporarily suspends production due to fire



Negative

₹ -64.77 Cr

- Suzuki admits to cheating on fuel economy test
- Maruti recalls over 75,000 Balenos to fix airbags, filters

Hyundai Motors

BRAND REP RANK | **02**

Hyundai's overall news coverage made up close to 6% of the automobile industry's total media coverage. Its positive news made up about 39% of its total coverage and neutral news constituted a share of about 55%.

Media Perception



Positive

₹ 135 Cr

- Hyundai Motors to unveil two new vehicles every year
- Hyundai readying an electric car with 320-km range



Neutral

₹ 41.79 Cr

- Hyundai to hike prices by up to Rs 82,906 on new levies
- Hyundai will form the top of the domestic car market company



Negative

₹ -11.09 Cr

- Hyundai recalls 173,000 Sonata cars in US
- Singapore probes Hyundai cars

Honda

BRAND REP RANK | **03**

Honda flaunts 4.3% of the automobile industry's total news article coverage in print media. Its positively toned news makes 31.3% in the overall share; neutral news comprises of 56.5%; while the share of news having a negative tonality is 12.2% in the overall print media coverage.

Media Perception



Positive

₹ 87 Cr

- Honda plans slew of new models for India
- Honda cars eyes double digit growth in FY17



Neutral

₹ 28.62 Cr

- Honda to hike car prices by up to Rs 6,000 from April
- Honda removes India CEO after 1 yr



Negative

₹ -17.83 Cr

- Honda, Acura recall 2.2 m vehicles
- Honda to Recall 20 m more Takata airbags

BMW

BRAND REP RANK | **04**

BMW's overall news coverage made up of only 3.9% of the automobile industry's total media coverage. Its positive news made up about 31.5% of its total coverage; neutral news constituted a share of 65%; while its negative news made up only 3.5% of its total coverage.

Media Perception



Positive

₹ 95.09 Cr

- BMW to go electric by 2021
- BMW rolls out 50,000th car from Chennai



Neutral

₹ 23.63 Cr

- BMW working to expand 'i' range
- BMW India launches 320i sedan at Rs 36.9 lakh



Negative

₹ -2.10 Cr

- BMW to recall 6,109 vehicles
- BMW stops sale of new models

Tata Motors

BRAND REP RANK | **05**

Tata Motor's total share of media coverage was about 13% of the industry coverage. Of the automobile brand's share of industry coverage in Print Media, about 67% of it was neutral in tonality while 24% was positively toned. As compared with other brands, its share of positive and neutral news was 9% and 25% respectively.

Media Perception



Positive

₹ 181.5 Cr

- Tata Motors global sales rise 5% in April
- Tata Motors opens global delivery centre



Neutral

₹ 101.2 Cr

- Tata Motors readying a sub-2.0-litre diesel engine
- Tata Motors pins hopes on Tiago to regain mkt share



Negative

₹ -54.1 Cr

- Tata-owned JLR to recall 36,415 faulty cars in China
- Labour trouble peels 4.4% off Tata Motors share price

Ford Motors

BRAND REP RANK | **06**

Ford's total share of media coverage was about 4.9% of the industry coverage. Of the automobile manufacturer's share of industry coverage in Print Media, about 61.5% was neutral in tonality while 30% was positively toned. Motorola's share of negative news among the coverage received was about 8.5%.

Media Perception



Positive

₹ 74.25 Cr

- Ford India opens technical training facility at Manesar
- Ford Motors sets records for profit, margins



Neutral

₹ 36.16 Cr

- Ford Mustang in India this year
- Ford plans a new car platform in India



Negative

₹ -12.52 Cr

- Ford recalls 1.9 m vehicles
- Ford India Recalls 48,700 EcoSport

Mercedes Benz

BRAND REP RANK | **07**

Mercedes Benz's total share of media coverage was about 5.5% of the industry coverage. Of the automobile manufacturer's share of industry coverage in Print Media, about 64% was neutral in tonality while 31% was positively toned. Its share of negative news among the coverage received by the industry was a paltry 0.75%.

Media Perception



Positive

₹ 133.09 Cr

- Mercedes Benz proposes to shift its vehicles to bio-diesel
- Mercedes's new growth plan -- Focus on smaller cities



Neutral

₹ 53.88 Cr

- Mercedes Benz unveils SUV
- India emerges as training hub for Mercedes Benz



Negative

₹ -7.59 Cr

- Mercedes to recall 6,828 vehicles in Russia
- Merc sued in US over suspected defeat device

Volkswagen

BRAND REP RANK | **08**

Volkswagen's total share of media coverage was about 5.4% of the industry coverage. Of the automobile brand's share of industry coverage in Print Media, about 45% was neutral in tonality while 25.5% was positively toned. Its share of news displaying a negative tone was a whopping 29%.

Media Perception



Positive

₹ 90.92 Cr

- Volkswagen gets communication system patent
- Volkswagen launches Ameo to tap into compact sedan segment



Neutral

₹ 26.86 Cr

- Volkswagen ramps up production at Chakan
- Volkswagen halts sales of diesel Vento



Negative

₹ -80.49 Cr

- VW emission 9 times more than cap
- Institutional investors sue Volkswagen for \$3.7 billion

Audi India

BRAND REP RANK | 09

Audi's overall news coverage made up 3.1% of the automobile industry's total media coverage. Its positive news made up about 34% of its total coverage; neutral news constituted a share of 59%; while its negative news made up just 7% of its total coverage.

Media Perception



Positive

₹ 90.80 Cr

- Audi revs up for India's clean air drive
- Audi launches special edition of R8 Coupe



Neutral

₹ 27.10 Cr

- Audi buoyant on India
- Audi looking at solutions for diesel issues in NCR



Negative

₹ -5.30 Cr

- Audi still in shadow of scandal

Toyota

BRAND REP RANK | 10

Toyota enjoys 5.5% of the automobile industry's total news article coverage in the print media. Its positively toned news makes 36% in the overall share; neutral news comprises of 56%; while the share of news having a negative tonality is 8% in the overall print media coverage.

Media Perception



Positive

₹ 145.14 Cr

- Toyota's compact car will meet fuel efficiency norms
- Odd-even rule boosts Toyota Camry hybrid sales



Neutral

₹ 34.30 Cr

- Toyota says 90% of Camry demand is for hybrid model
- Toyota to open diesel engine plant in a month



Negative

₹ -17.13 Cr

- Toyota recalls 2.9 million cars over seatbelt defect
- Toyota halts production in Japan

Nissan India

BRAND REP RANK | 11

Nissan has earned a total of 3.6% of the share of articles in the overall coverages in Print Media. It comprises of 39.1% news with positive tonality, 51% news with neutral tonality, and 9.9% negatively-toned news.

Media Perception



Positive

₹ 95.69 Cr

- Nissan to buy \$2.2bn stake to take control of Mitsubishi
- 2017 Nissan GT-R NISMO debuts at Nurburgring



Neutral

₹ 20.30 Cr

- Nissan opens two new dealerships in Mumbai



Negative

₹ -10.09 Cr

- S Korea Says Nissan Fudged Emission Data
- Nissan recalls 3.5 mn vehicles for airbag problems

Mahindra Auto

BRAND REP RANK | 12

Mahindra Auto's overall news coverage made up of only 5% of the automobile industry's total media coverage. Its positive news made up about 43.5% of its total coverage; neutral news constituted a share of 54%; while its negative news made up only 2.5% of its total coverage.

Media Perception



Positive

₹ 170.4 Cr

- Mahindra Q4 net profit rises 14%
- Mahindra speeds up auto sector in May



Neutral

₹ 35.12 Cr

- Mahindra joins EP100 campaign
- Mahindra rolls out eVerito



Negative

₹ -6.48 Cr

- Mahindra net dips 14% to Rs.808 crore

Renault India

BRAND REP RANK | 13

Renault stakes its claim in the industry with 4.1% of the overall print media share among automobile brands. This includes 43.2% of the news that is positive in its tonality; 48.7% that has a negative tone and 8.1% of the printed news that has a neutral tone.

Media Perception



Positive

₹ 115.36 Cr

- Renault to expand dealerships to 240 by 2016
- Renault plans to lure 300 tech professionals from Silicon Valley



Neutral

₹ 25.73 Cr

- Renault India Ventures into Used Car Business
- Renault to up Kwid production as demand soars



Negative

₹ -15.27 Cr

- DRI summons Renault Nissan CFO in tax case
- Renault halts Kwid output over engine problem

Jaguar Cars

BRAND REP RANK | 14

Jaguar has earned 2.7% of the total share in printed media articles. This includes 45% of all the printed articles as positively toned; while 47% is neutral in its tonality.

Media Perception



Positive

₹ 95.56 Cr

- SUV sets pace for Jaguar's future
- Jaguar Land Rover posts 11% rise in sales



Neutral

₹ 17.53 Cr

- Jaguar drives Tata Motors net



Negative

₹ -5.40 Cr

- Jaguar in legal trouble with Chinese automakers

Porsche Automobiles

BRAND REP RANK | 15

Porsche's overall news coverage made up of only 1.3% of the automobile industry's total media coverage. Its positive news made up about 24.5% of its total coverage while neutral news constituted a share of 67.6%.

Media Perception



Positive

₹ 34.26 Cr

- Porsche 911 -- A work of art
- Porsche Wins in Paul Walker Wrongful Death Case



Neutral

₹ 10.87 Cr

- 2016 Porsche 911 range coming to India



Negative

₹ -2.47 Cr

- Porsche recalls around 14,500 cars

Skoda Auto

BRAND REP RANK | 16

Skoda's total share of media coverage was about 0.88% of the industry coverage. Of the automobile brand's share of industry coverage in Print Media, about 59% was neutral in tonality, while 34% was positively toned.

Media Perception



Positive

₹ 43.42 Cr

- Skoda launches new, fuel-efficient Superb
- With New Launches, Skoda Aims for a Superb India Show



Neutral

₹ 6.97 Cr

- Gill to lead MRF-Skoda challenge in 2016 APRC



Negative

₹ -1.93 Cr

- Skoda suspends sale of Rapid diesel

Fiat Automobiles

BRAND REP RANK | 17

Fiat has 1.9% of articles from the total share of the automobile industry's in print media. The share of the positively toned articles is 30.5%; while the negatively toned articles comprise of 13.1%.

Media Perception



Positive

₹ 28.54 Cr

- Google autonomous car project teams with Fiat
- Fresh drive: Fiat looks to revive love story in India



Neutral

₹ 13.33 Cr

- Fiat Used By Pope Fetches \$300,000
- Fiat Chrysler CEO sees only Toyota, VW, Ford as merger candidates



Negative

₹ -7.22 Cr

- Fiat Chrysler to recall 1.1 mn autos
- Fiat Chrysler Shares Fall on Sales Ban Threat

Ferrari Auto

BRAND REP RANK | 18

Ferrari's overall news coverage made up just 0.84% of the automobile industry's total media coverage. Its positive news made up about 23% of its total coverage; neutral news constituted a share of 74%; while its negative news made up 3% of its total coverage.

Media Perception



Positive

₹ 33.58 Cr

- Ferrari unveils 488GTB
- ICICI Bank ties up with Ferrari for co-branded credit card



Neutral

₹ 11.49 Cr

- Ferrari Names Fiat Chrysler Chief as CEO



Negative

₹ -1.12 Cr

- Ferrari goes into reverse
- Ferrari's flop foray

Land Rover

BRAND REP RANK | 19

Land Rover's total share of media coverage was about 3.2% of the industry coverage. Of the automobile brand's share of industry coverage in Print Media, about 59.5% was neutral in tonality while 34.5% was positively toned. Its share of news displaying a negative tone was 6%.

Media Perception



Positive

₹ 74.44 Cr

- Jaguar Land Rover production passes half million-mark



Neutral

₹ 26.22 Cr

- Land Rover launches tech venture to test car-sharing



Negative

₹ -5.10 Cr

- Land Rover in legal soup

Chevrolet Automobiles

BRAND REP RANK | 20

Chevrolet come in with 0.89% of the overall print media share. This includes 31.7% of the news that is positive in its tonality, 7.1% that has a negative tone, and the rest of the printed news has a neutral tone.

Media Perception



Positive

₹ 25.42 Cr

- Chevrolet's Trax set for redesign
- GM offering heavy discounts on new Chevrolet Cruze



Neutral

₹ 8.65 Cr

- Chevrolet working on Creta revival
- Chevrolet stays on the Beat with two concepts



Negative

₹ -1.22 Cr

- Passenger vehicle sales off to a shaky start



Amit Chhangani
Founder and Editor,
Motoroids.com

REP-OPINION

Till only about a couple of years back, there really wasn't any real alternative to owning a comfortable car and hiring a full-time driver if you fancied the convenience of being chauffeured to your destination. Times change fast, and as I write this, thousands of middle-class car buyers are doing the long-term math and making a decision over whether buying a car really makes sense. While still in a nascent stage, the idea is catching up with young, urban dwellers. The Real Estate prices in cities like Mumbai and Delhi are prohibitive for many, and adding parking space to the mix only worsens the scenario. Not to mention the cost of the car itself, which is one of the worst investments you could ever make from a depreciation perspective.

While the car buying trends have still changed significantly with the advent of the modern cab-hailing services, one could very palpably sense the beginning of it. For those using a car for limited use, hailing a comfortable, air-conditioned, chauffeur-driven cab often turns out cheaper than owning a car. This is especially true if the owner is opting for a more premium model from the C+ segment (~12 lakh) or above.

And this is not hearsay or conjecture. It's a trend that has begun reflecting in consumers' buying patterns, albeit slightly, and car companies are taking due note. Hailing an air conditioned cab is not a luxury anymore – it's an everyday affair for most metropolitan dwellers with a reasonable income. A driver's monthly pay itself is equivalent to the monthly expenditure incurred on taking a cab to work for some. Add to it the expenses on the car's down payment, EMIs, and fuel, and opting for an Uber or Ola ride instead of owing a car starts making sense.

India, despite being touted as an economic superpower, still has a large population of people belonging to lower income groups. This segment is driven by aspiration and its size is growing fast. Exactly how the cab services would adapt themselves to expand their business to the lower income groups is something that remains to be seen. Services like Ola Micro, which promise charges as low as Rs. 6 per km, and the share-a-cab option, seem to be a beginning in that direction, but they probably need to do more to make the lower income groups hop aboard their ride.

The pragmatic young Indian believes in convenience, and it wouldn't be too difficult to persuade him to not buy a car at all, even if he very comfortably could. The rapid growth registered by Ola and Uber is testimony to the fact, and this trend is only going to increase.

So the ride-hailing services are here to stay and they will only be stronger as time goes by. But would they have an effect on the private ownership of cars? I personally think it would, over a period of time. Although an argument against the logic is that cars aren't mere white goods and they evoke a stronger sense of emotion. Cars are more loved by their owners as compared to their other possessions, which is a historically proven and well-acknowledged argument. However, this trait by itself is diminishing, and people in modern times aren't as attached to their cars as they used to be, say, a decade back.

Another important point is that while the car buying decisions may be affected for the second and third cars, the small households are still going to go ahead and buy their first car.

So would the rise of cab-hailing services affect the buying decisions of car consumer? The answer, it seems, is a yes. The extent of it, however, would be clearer only with time.

Lamborghini

BRAND REP RANK | **21**

Lamborghini accumulated 0.44% of articles shared in the total share of the automobile industry in print media. The share of the positively toned articles is 32.9% while the negatively toned articles comprise of just 1.5%.

Media Perception



Positive

₹ 18.29 Cr

- Lamborghini launches Huracan Spyder
- Lamborghini's first SUV in India drives sales to a new high



Neutral

₹ 5.54 Cr

- Lamborghini appoints Sharad Agarwal as India head



Negative

₹ -0.23 Cr

- Lamborghini destroyed in Taiwan for having fake plates

Datsun India

BRAND REP RANK | **22**

Datsun's overall news coverage made up only 0.72% of the automobile industry's total media coverage. Its positive news made up a massive 72.5% of its total coverage with neutrally-toned news constituting a share of 23.5%.

Media Perception



Positive

₹ 50.23 Cr

- Datsun zips into entry-level segment with redi-GO
- Datsun Upping its Game to Grab 5% Market Share



Neutral

₹ 1.55 Cr

- Datsun plans a 2.5L rival to take on Alto, Eon



Negative

₹ -0.09 Cr

- About 1000 redi-GO units recalled

Isuzu Motors

BRAND REP RANK | **23**

Isuzu's overall news coverage made up of only 0.21% of the automobile industry's total media coverage. TCL's positive news made up a massive 58.8% of its total coverage; neutral news constituted a share of 39%.

Media Perception



Positive

₹ 6.33 Cr

- Isuzu opens production unit in Andhra Pradesh
- Japanese Isuzu wants to go fully Indian by 2018



Neutral

₹ 2.39 Cr

- Isuzu opens production unit in Andhra Pradesh
- Naidu Drives in Isuzu's First Made in India Car



Negative

₹ -0.01 Cr

- Isuzu V-Cross recalled over jerky power delivery

Lexus

BRAND REP RANK | **24**

Lexus has 0.28% of articles' share in the total articles from the automobile industry in print media. The share of the positively toned articles is 31% while the negatively toned articles comprise of a large 19.2%.

Media Perception



Positive

₹ 4.32 Cr

- Lexus to have exclusive outlets
- Lexus LC 500 Coupe That Can Handle Stop-And-Go Traffic



Neutral

₹ 1.89 Cr

- Special Outlook preparation for Lexus



Negative

₹ -1.93 Cr

- Toyota Recalls 18757 Lexus Cars in Russia.

Hindustan Motors

BRAND REP RANK | **25**

Hindustan Motors' overall news coverage made up of only 0.09% of the automobile industry's total media coverage. Its positive news made up about 15% of its total coverage; neutral news constituted a share of 84%.

Media Perception



Positive

₹ 0.37 Cr

Hindustan Motors carrying forward a rich legacy



Neutral

₹ 0.23 Cr

Shriram Properties to develop project on Hindustan Motors land



Negative

₹ -0.03 Cr

Passenger vehicle sales off to a shaky start

Volvo Auto India

BRAND REP RANK | **26**

Volvo Auto India boasts of 1.24% of articles from the total share of the automobile industry in print media. The share of the positively toned articles is 48%; while the negatively toned articles comprise of just 1.23%. The articles that were neutral in their tonality comprised of 50.1%.

Media Perception



Positive

₹ 52.54 Cr

Volvo will make world's first key less car
Volvo Auto to launch 6 new models in 2016



Neutral

₹ 11.54 Cr

Volvo Auto India Goes for Vehicle Price Revision



Negative

₹ -0.45 Cr

Volvo to recall 59,000 cars for faulty software

Jeep

BRAND REP RANK | **27**

Jeep has earned 0.76% of the total share in printed media articles too. This includes 60% of all printed articles as neutrally toned while 6% is negative in its tonality.

Media Perception



Positive

₹ 29.91 Cr

All-new affordable Jeep in the works
India to drive Jeep's global ambitions



Neutral

₹ 13.08 Cr

Jeep to make India production hub



Negative

₹ -0.57 Cr

Half million Jeep Wranglers recalled

Rolls-Royce Motor Cars

BRAND REP RANK | **28**

Rolls-Royce comes in with 0.61% of the industry's overall print media share. This includes 27.5% of the news that is positive in its tonality, 66.2% that has a neutral tone, and 6.3% of the printed news that is negative.

Media Perception



Positive

₹ 18.96 Cr

Tata firm inks pact for Rolls-Royce engine parts



Neutral

₹ 6.23 Cr

Rolls-Royce to set up engine joint venture in China
TAML to supply Rolls-Royce engines for 10 years more



Negative

₹ -1.27 Cr

Rolls-Royce makes first dividend cut since 1992

Ashok Leyland

BRAND REP RANK | **29**

Ashok Leyland's total share of media coverage was about 0.38% of the industry coverage. Of the automobile manufacturer's share of industry coverage in Print Media, about 64% was neutral in tonality while 22.8% was positively toned.

Media Perception



Positive

₹ 2.85 Cr

- Ashok Leyland plans to focus on core business
- Ashok Leyland to boost investments to meet BS-VI target



Neutral

₹ 2.30 Cr

- Ashok Leyland: Market gain leads to rerating
- Ashok Leyland firing on all cylinders



Negative

₹ -1.20 Cr

- Ashok Leyland-Nissan joint venture hits a rough patch

Aston Martin

BRAND REP RANK | **30**

Aston Martin's overall news coverage made up 0.33% of the automobile industry's total media coverage. Its positive news made up about 46.1% of its total coverage; neutral news constituted a share of 52.2%; while its negative news made up only 1.7% of its total coverage.

Media Perception



Positive

₹ 19.37 Cr

- Aston Martin to Develop Electric Car



Neutral

₹ 2.97 Cr

- Aston Martin's Vantage GTS may be the last truly fun car



Negative

₹ -0.01 Cr

- Hindustan Motors carrying forward a rich legacy

Bentley Motors

BRAND REP RANK | **31**

Bentley has earned 0.31% of the total share of printed media articles. This includes 41.6% of all the printed articles as positively toned and 57.7% neutral articles.

Media Perception



Positive

₹ 13.63 Cr

- Bentley's SUV a big hit
- It's boom time for Bentley in India



Neutral

₹ 2.43 Cr

- Bentley Hopes for 100 Units a Year Sales in India by 2017



Negative

₹ -0.03 Cr

- Hyundai poaches Bentley exterior designer"

Peugeot Cars

BRAND REP RANK | **32**

Peugeot's total share of media coverage was about 0.27% of the industry coverage. Of the automobile brand's share of industry coverage in Print Media, about 61% was neutral in tonality while 31% was positively toned.

Media Perception



Positive

₹ 5.38 Cr

- Peugeot to develop e-cars
- Peugeot Citroen returns to profit



Neutral

₹ 1.06 Cr

- Peugeot targets partnership in India by 2018, product launch by 2021



Negative

₹ -0.97 Cr

- Maker of Peugeot, Citroen cars, raided by fraud squad

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Force Motors

BRAND REP RANK | **33**

Force Motors takes pride in having 0.24% of the total share of articles in Print Media. 36.1% of these articles had a positive tonality towards the automobile brand while 60% of the news articles were qualified as having a neutral tone.

Media Perception



Positive

₹ 2.71 Cr

- Force Motors upbeat over FY16 results
- Force Motors Q4 net profit rises 59% at Rs 74 cr



Neutral

₹ 0.86 Cr

- Force Motors rolls out 2 large vans



Negative

₹ -0.05 Cr

- Force Motors down nearly 4% as Q3 profit declines

Maserati

BRAND REP RANK | **34**

Maserati's total share of media coverage was about 0.23% of the industry coverage. Of the Indian automobile manufacturer's share of industry coverage in Print Media, about 58% was neutral in tonality while 26% was positively toned.

Media Perception



Positive

₹ 8.84 Cr

- Maserati Levante diesel to enter India by January 2017



Neutral

₹ 1.22 Cr

- Maserati's first SUV breaks cover
- Maserati drives into Mumbai



Negative

₹ -0.22 Cr

- Maserati recalls sedans on risk of speed bursts
- Maserati to recall 21K cars in China

SsangYong Motors

BRAND REP RANK | **35**

SsangYong has 0.18% of articles shared in the total share of the automobile industry in print media. The share of the positively toned articles is 46.1% while the negatively-toned articles comprise of just 7.3%.

Media Perception



Positive

₹ 3.10 Cr

- SsangYong Motors targets US entry



Neutral

₹ 0.94 Cr

- Compact SsangYong unveiled



Negative

₹ -0.29 Cr

- SsangYong Motor Struggles to Seek Restructuring

Cadillac

BRAND REP RANK | **36**

Cadillac's total share of media coverage was about 0.14% of the automobile industry coverage in the country. Its neutral news comprised of a whopping 76.5% while the news having a positive tone was 23.5%. There was no negative news in the given period.

Media Perception



Positive

₹ 5.36 Cr

- Cadillac sees double digit sales growth in China



Neutral

₹ 0.69 Cr

- Looks over features?
- Cadillac sees double-digit sales growth in China



Negative

NIL

Opel Automobiles

BRAND REP RANK | **37**

Opel's overall news coverage made up only 0.10% of the automobile industry's total media coverage. Acer's positive news made up about 14% of its total coverage; neutral news constituted a share of 57.7%.

Media Perception



Positive

₹ 1.48 Cr

Opel to Unveil All-Electric Ampera-e



Neutral

₹ 0.27 Cr

Cadillac sees double digit sales growth in China



Negative

₹ -0.16 Cr

Opel called for emission probe

Bugatti

BRAND REP RANK | **38**

Bugatti takes pride in having 0.10% of the total share of articles in Print Media. 61% of the articles that were published had a neutral tonality towards the automobile brand while 34.2% of the news articles were qualified as having a positive tone.

Media Perception



Positive

₹ 7.37 Cr

The fastest car: Bugatti Chiron



Neutral

₹ 0.46 Cr

Bugatti showcases new Chiron in Japan



Negative

₹ -0.43 Cr

Bugatti's Million-Dollar Veyron Being Recalled

Mini Cars

BRAND REP RANK | **39**

Mini's total share of media coverage was about 0.06% of the industry coverage. Of the automobile brand's share of industry coverage in Print Media, about 40% was neutral in tonality while 60.3% was positively toned.

Media Perception



Positive

₹ 3.58 Cr

Why the Mini Cooper S is still the hottest hatch in town



Neutral

₹ 0.36 Cr

Mini Cooper price in India



Negative

NIL

Koenigsegg Automobiles

BRAND REP RANK | **40**

Koenigsegg's overall news coverage made up of only 0.02% of the automobile industry's total media coverage. Its positively toned news comprised of a whopping 73.9% while the news having a neutral tone was 26.1%.

Media Perception



Positive

₹ 5.33 Cr

Koenigsegg to present Agera XS



Neutral

₹ 0.06 Cr

18 most expensive brands in the world



Negative

NIL

Premier

BRAND REP RANK | **41**

Premier's total share of media coverage was about 0.01% of the industry coverage. All of the automobile manufacturer's share of industry coverage in Print Media was neutrally toned.

Media Perception



Positive

NIL



Neutral

₹ 0.07 Cr

■ Premier Rio reviews



Negative

NIL

Mitsubishi Motors

BRAND REP RANK | **42**

Mitsubishi had 0.77% of articles shared in the total share of the automobile industry in print media. The share of the positively toned articles is 10.3% while the negatively-toned articles comprise a large 37.4%. The articles that were neutral make up the rest of the total print media share.

Media Perception



Positive

₹ 3.36 Cr

■ Mitsubishi Motors joins Renault-Nissan Alliance



Neutral

₹ 3.56 Cr

■ Fierce competition behind Mitsubishi's faked data



Negative

₹ -10.38 Cr

■ Scandal wipes \$2.5bn off Mitsubishi stock
■ Mitsubishi Motors admits using wrong tests since 1991



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05

Most Reputed Automobile Brands – Compiled Listings

Most Reputed Automobile Brands - Listings

RANK	BRAND NAME	COUNTRY OF ORIGIN
1	MARUTI SUZUKI	India
2	HYUNDAI MOTORS	South Korea
3	HONDA	Japan
4	BMW	Germany
5	TATA MOTORS	India
6	FORD MOTORS	USA
7	MERCEDES BENZ	Germany
8	VOLKSWAGEN	Germany
9	AUDI INDIA	Germany
10	TOYOTA	Japan
11	NISSAN INDIA	Japan
12	MAHINDRA AUTO	India
13	RENAULT INDIA	France
14	JAGUAR CARS	United Kingdom
15	PORSCHE AUTOMOBILES	Germany
16	SKODA AUTO	Czech Republic
17	FIAT AUTOMOBILES	Italy
18	FERRARI AUTO	Italy
19	LAND ROVER	United Kingdom
20	CHEVROLET AUTOMOBILES	United States
21	LAMBORGHINI	Italy
22	DATSUN INDIA	Japan
23	ISUZU MOTORS	Japan
24	LEXUS	Japan
25	HINDUSTAN MOTORS	India
26	VOLVO AUTO INDIA	Sweden
27	JEEP	USA

Most Reputed Automobile Brands - Listings

RANK	BRAND NAME	COUNTRY OF ORIGIN
28	ROLLS-ROYCE MOTOR CARS	United Kingdom
29	ASHOK LEYLAND	India
30	ASTON MARTIN	United Kingdom
31	BENTLEY MOTORS	United Kingdom
32	PEUGEOT CARS	France
33	FORCE MOTORS	India
34	MASERATI	Italy
35	SSANGYONG MOTORS	South Korea
36	CADILLAC	United States
37	OPEL AUTOMOBILES	Germany
38	BUGATTI	France
39	MINI CARS	United Kingdom
40	KOENIGSEGG AUTOMOBILES	Sweden
41	PREMIER	India
42	MITSUBISHI MOTORS	Japan



Category-wise Listings

Four-Wheeler Manufacturer (General)

CATEGORY RANK	OVERALL RANK	BRAND NAME	COUNTRY OF ORIGIN
1	1	Maruti Suzuki	India
2	2	Hyundai Motors	South Korea
3	3	Honda	Japan
4	5	Tata Motors	India
5	6	Ford Motors	USA
6	8	Volkswagen	Germany
7	10	Toyota	Japan
8	11	Nissan India	Japan
9	12	Mahindra Auto	India
10	13	Renault India	France
11	15	Porsche Automobiles	Germany
12	16	Skoda Auto	Czech Republic
13	17	Fiat Automobiles	Italy
14	19	Land Rover	United Kingdom
15	20	Chevrolet Automobiles	United States
16	22	Datsun India	Japan
17	23	Isuzu Motors	Japan
18	25	Hindustan Motors	India
19	26	Volvo Auto India	Sweden
20	27	Jeep	USA
21	29	Ashok Leyland	India
22	32	Peugeot Cars	France
23	33	Force Motors	India
24	35	SsangYong Motors	South Korea
25	37	Opel Automobiles	Germany

Category-wise Listings

Four-Wheeler Manufacturer (General)

CATEGORY RANK	OVERALL RANK	BRAND NAME	COUNTRY OF ORIGIN
26	39	Mini Cars	United Kingdom
27	41	Premier	India
28	42	Mitsubishi Motors	Japan

Four-Wheeler Manufacturer (Luxury)

CATEGORY RANK	OVERALL RANK	BRAND NAME	COUNTRY OF ORIGIN
1	4	BMW	Germany
2	7	Mercedes Benz	Germany
3	9	Audi India	Germany
4	14	Jaguar Cars	United Kingdom
5	18	Ferrari Auto	Italy
6	21	Lamborghini	Italy
7	24	Lexus	Japan
8	28	Rolls-Royce Motor Cars	United Kingdom
9	30	Aston Martin	United Kingdom
10	31	Bentley Motors	United Kingdom
11	34	Maserati	Italy
12	36	Cadillac	United States
13	38	Bugatti	France
14	40	Koenigsegg Automobiles	Sweden

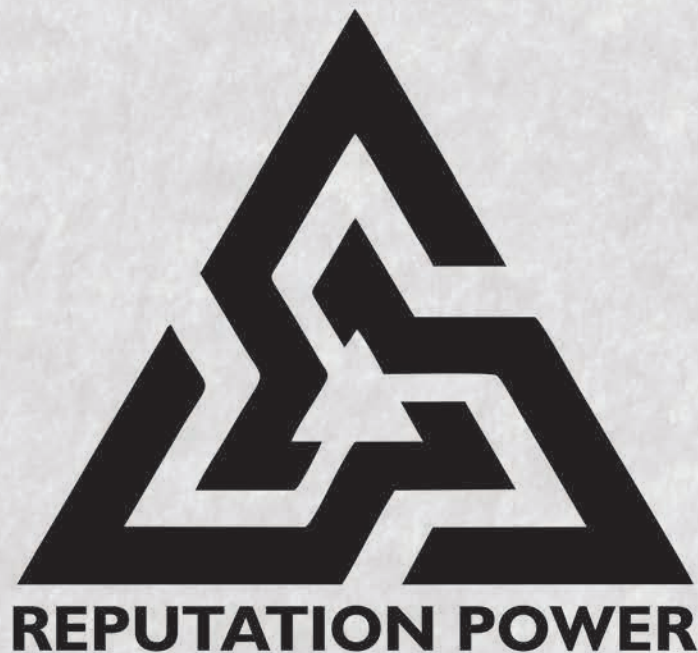
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The Indian Automobile Industry is well on its way to being the world's third largest by 2020, a collective goal all its stakeholders and insiders have been steadfastly aiming for. With the Center focusing on implementing stricter norms, upgrading the infrastructure available to the industry, and pushing for greener and more sustainable growth, the ball is firmly in the court of the Industry players to step up and be counted. Growth in these times will stand contemporary players in good stead when one thinks of 5 - 10 years from now.

Though the ebb of 2014 - 15 and Demonetization hit the Industry, it has not drastically affected its growth. Given its great potential to employ youth for the long term, the automobile industry in India remains one of the largest avenues for the Make in India initiative. Moreover, there is no denying the logistical and psycho-social advantages or the pride the middle class Indian experiences when their first car's keys come into their hands. Given these obvious and wide-scoped macro and micro roles the Indian Automobile Industry and therefore its players play in the nation's asset building, a stellar Reputation is not only a requirement but an established need for the Indian Automobile brands today.

Reputation is built from several factors, and not all those factors are tangible. India's Most Reputed Automobile Brands – 2017 is a one-of-a-kind study that enables brands to understand where they stand in terms of consumer and media mindshare. The Report is a unique synergetic effort of Bluebytes, among India's leading Media-monitoring companies, and TRA Research, a brand intelligence firm, both nested under the Comniscient Group.

“The car has become an article of dress without which we feel uncertain, unclad, and incomplete.”

- Marshall McLuhan, Canadian Philosopher and Intellectual




India's Most Reputed Automobile Brands

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