

CUSTOMER EXPERIENCE INDEX

ASSESSING CUSTOMER SATISFACTION & CUSTOMER EXPERIENCE: A QUANTITATIVE RESEARCH



ENGAGEMENT OBJECTIVES



Key Objective

- To understand and quantify Customer Satisfaction focusing on their journey in sales, after sales service and product quality in the Passenger Vehicle category
- To assess key drivers of satisfaction and quantum of their contribution to the satisfaction
- To determine the key barriers of satisfaction and identify the areas of improvement

Strategic Imperatives

The research findings will provide insights to customer satisfaction/ dissatisfaction towards an OEM network and product. The research output will serve as the key input for the OEMs to design a robust customer-centric strategy.

SUMMARY OF OUR PROCESS

UNDERSTANDING THE CUSTOMER SATISFACTION FOR SALES, AFTER-SALES SERVICE AND PRODUCT QUALITY IN THE PASSENGER VEHICLE CATEGORY



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|--------------------------------|--|
| Summary of Our Approach | <p>Frost & Sullivan proposes to conduct a Quantitative research, using a structured Questionnaire for data collection.</p> <p>Face-to-face interviews will be conducted in CAPI format, across 26 cities (7 Metro , 16 Tier 2 and 3 Tier 3 cities), spread across 4 zones of India.</p> <p>A Total of N=8,000 sample size will be covered in the survey</p> |
| Product Scope | Passenger Vehicle |
| Respondent Profile | <ul style="list-style-type: none">• Males and Females aged 18 years onwards, who are the key purchase decision makers for the primary vehicle• Must be a primary user (only personal usage) of a personally owned vehicle• The primary vehicle must be 'new' when purchased (exclude, pre-owned, leased, rented)• The primary vehicle must be purchased from an authorized dealer <p>Eligibility criteria:</p> <ul style="list-style-type: none">• Sales and Product Quality: Purchased the primary vehicle within last 12 months• After Sales Service: Purchased the primary vehicle in between last 12- 36 months and serviced, at least once, in last 6 months from an authorized service center |
| Timeline | Estimated project duration is of 24 weeks for delivering the required survey outcomes. |

KEY INFORMATION AREAS

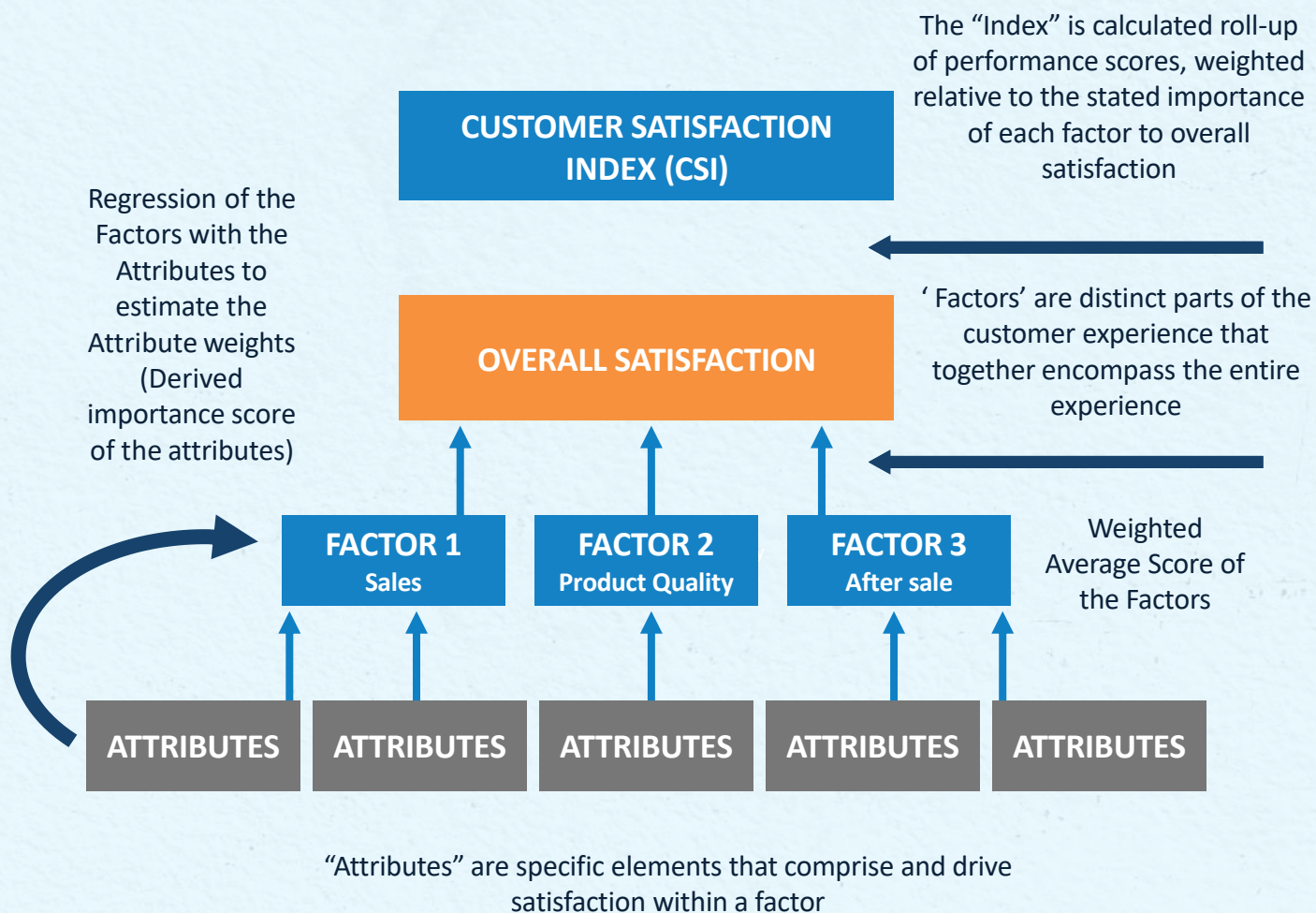


Broad Information Areas

- Current Vehicle Usage
- Overall customer satisfaction with the manufacturers and reasons thereof
- Willingness to continue using the OEM in future
- Recommendation intention (advocacy) of the OEMs to others
- Satisfaction on individual aspects related to pre-sales, product, after sales etc.
- Unmet needs, Improvement suggestions and Key expectations (need gap)
- Brand image/perception (on brand reputation, popularity, reliability, technological progressiveness, innovation, value-for-money, customer focus etc.)
- Respondent Profile

FROST & SULLIVAN WILL FOLLOW A TESTED AND APPLIED CUSTOMER SATISFACTION INDEX DETERMINATION MODEL TO DERIVE THE SATISFACTION DRIVERS AND EVOLVE A PRIORITIZATION MATRIX

Customer Satisfaction Index (CSI), is a single score, that indicates the overall satisfaction, as obtained by combining the satisfaction score across a battery of attributes / factors.



Stated Importance

- Ratings on a scale of 1 to 5
- Identify most important attribute(s) and give a score of 5
- Similarly, least important attribute(s) give a score of 1
- All other attributes scored between 2 and 4 depending on relative importance with the identified end points.

- Advantages:**
- Better discrimination
 - Defines anchor points
 - Clarity in identifying key satisfiers

Derived Importance

- Based on regression analysis of the 'satisfaction with various parameters' with 'overall satisfaction'

| | High | | High |
|---|----------------------------------|--------------------|--|
| Good performance not expected, but valued when offered, opportunity for differentiation | Hidden Opportunities/ Delighters | Key drivers | Performance proportional to satisfaction, good performance drives increased satisfaction |
| Derived importance | | | |
| Little impact on evaluation or differentiation | Low yield/ Least influential | Qualifier/ Generic | Must haves or market requirements for market participation |
| | Low | Stated importance | High |

A QUANTITATIVE RESEARCH APPROACH WILL BE ADOPTED TO GAIN INSIGHTS ON CUSTOMER SATISFACTION FOCUSING ON THEIR JOURNEY IN SALES, AFTER SALES SERVICE AND PRODUCT QUALITY IN THE PASSENGER VEHICLE CATEGORY

- A structured quantitative questionnaire will be used for data collection.
- Each interview is expected to last for about 40 mins.
- Face-to-face interviews in CAPI (Computer Aided Personal Interview) will be conducted.

Target Respondents for “Sales” & “Product Quality” evaluation

- Respondents must meet the following screening criteria :**
- Males and Females aged 18 years onwards
 - Must be a primary user (only personal usage) of a personally owned vehicle
 - The primary vehicle must be ‘new’ when acquired (exclude, pre-owned, leased, rented etc.)
 - The primary vehicle must be purchased from an authorized dealer within last 12 months
 - Must be involved in the purchase decision making for the primary vehicle-Solely/Jointly

Target Respondents for “After-Sales Service” evaluation

- Respondents must meet the following screening criteria :**
- Males and Females aged 18 years onwards
 - Must be a primary user (only personal usage) of a personally owned vehicle
 - The primary vehicle must be ‘new’ when acquired (exclude, pre-owned, leased, rented etc.)
 - The primary vehicle must be purchased from an authorized dealer between last 12- 36 months
 - Must have availed at least one after sales service for the primary vehicle in past 6 months from an authorized service center
 - Must be involved in the purchase decision making for the primary vehicle-Solely/Jointly

A QUANTITATIVE RESEARCH APPROACH WILL BE ADOPTED TO GAIN INSIGHTS ON CUSTOMER SATISFACTION FOCUSING ON THEIR JOURNEY IN SALES, AFTER SALES SERVICE AND PRODUCT QUALITY IN THE PASSENGER VEHICLE CATEGORY (CONT)

| | |
|------------------------------|--|
| Vehicle Segment Scope | <p>Following Segments of Passenger Vehicle shall be covered in the survey :</p> <ul style="list-style-type: none">• Hatch• Sedan• SUV/ MPV• EV• Luxury |
| Geographic Scope | <p>To make the sample representative, we will spread the sample across all 4 regions (North, East, West & South), covering Metros, Tier 1 & Tier 2 cities)</p> |
| Sample Size | <p>A Total Sample Size N=8,000 will be covered</p> |

OPEN TO QUESTIONS

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