

# *Honda Activa– The Revival of Scooters in India*

Anuj Verma<sup>1\*</sup> and Meenakshi Verma<sup>2</sup>

<sup>1&2</sup>Assistant Professor, Symbiosis International University, Nagpur, Maharashtra, India

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## **Abstract**

This case deals with the factors which led to the rise of Honda Activa – the first unisex scooter in India. It highlights the importance of decision making and an in-depth understanding of customer behaviour for the success of any product. The case further explores the future challenges which Honda MotoCorp faces due to BS-VI norms and electrification of automobiles in India and probes the dilemma the company faces, as to whether to continue with the conventional model of scooters or invest into their electric version. This case has been written based on secondary data and magazines, websites, journals have been referred for this paper. The case highlights the factors which led to the growth of Honda Activa and the decision-making skill of the management which led to the revival of the ailing scooter market in India. It also explores the business model developed by HSMI and the challenges it faces in the future due to the implementation of BS-VI norms and electrification of two-wheelers in India. Since the case is based on secondary data, there is room for further updating on facts and figures about the company. The case highlights the needs to understand the requirement of the target customer which can lead to the success of the products. This paper fulfils an identified need to study the latent demand of automobiles users in the country.

**Key Words:** Automobile, Scooter, Positioning, Activa, Brand, Market share

## **Introduction**

Success is no accident. The secret lies in being ready when the opportunity comes and Honda's is not an exception. Its stupendous growth has mesmerized the business community and paved a new chapter in the automobile industry. Bajaj Automobiles which pioneered the scooter business in India, laid it to rest, citing poor response and Honda motors picked up those threads and brilliantly turned the conundrum into a gold mine. The success story has been cooked with a flavour of risk, precise planning and garnished with innovative product targeting the right segment of consumers. India is the largest market for two-wheelers provided ample space for companies to grow

fruitfully. When Bajaj Automobiles aimed to become a complete bike solution company, Honda revolutionized the market by introducing gearless four-stroke scooters. Initially, majority players were sceptical about the plunge in the dying scooter market but later the bandwagon was joined by all major players barring Bajaj Automobiles. Honda Activa became a generic brand in the scooter market and was benchmarked by rivals who launched their version of gearless scooters. At present Activa has surpassed the sales figure of iconic Splendor and became the largest selling two-wheeler in the world. This case explores the factors which led to the exponential growth of Honda and tries to unveil its future course of action.

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## **\*Corresponding Author**

This article is a teaching case developed using secondary sources. Teaching cases are meant for classroom discussion and do not indicate administrative best practices. They may also not be used as sources of research data for drawing generalisable insights.

**The Background:**

Indian roadways have a history of scoring very poorly on the global quality index and the burgeoning population has further added to its woes. The transportation system in India is highly disintegrated and fails to provide last-mile connectivity to the majority of commuters which has propelled the ownership of private vehicles. The middle-class working group which forms the backbone of Indian economy relies heavily on two-wheelers to solve their transportation issues which have made India the largest market for two-wheelers across the globe. The success of major two-wheeler brands has been a roller-coaster ride with unsurmountable challenges in terms of acquiring the latest technology and keeping the cost of manufacturing and servicing at competitive levels. Bajaj Automobiles had brilliantly occupied a generic image of two-wheelers for the middle-class population. Its Tagline "Buland Bharat Ki Buland Tasvir" was a true reflection of the growing aspirations of the middle class which was rightfully fulfilled by the company. While the motorcycle became the preferred choice for youths, the scooter was comfortably positioned for the middle-class family. However, the increasing population of young working-class vouched for

better mileage and maintenance hence the market share of motorcycles increased at the cost of scooters and slowly the segment started losing its charm. The paradigm shift was evident when Bajaj Auto shut down its scooter production to focus on motorcycles. The "fill it, shut it, forget it" offerings from Hero Honda had made a huge dent in the formidable positioning of scooters. In the year 1999 Honda floated its subsidiary with a specific agreement with its erstwhile partner Hero MotoCorp that it would focus on the automated scooter segment only and initially would not produce competing products in the motorcycle segments for a specific period. This led to the introduction of Activa the first 4 stroke gearless scooter in the market which in a short span of time established itself in numero - uno position. Adorning a mouth-watering figure of selling 3,154,030 units for the FY17-18 (Amit) it surpassed the sales figure of Splendor the blue-eyed baby of Hero Group.

**Top 10 Selling Two Wheelers**

Sales FY15-16		Sales FY16-17		Sales FY17-18	
Product	Total Sales	Product	Total Sales	Product	Total Sales
Splendor	24,86,065	Activa	27,59,835	Activa	31,54,030
Activa	24,66,350	Splendor	25,50,830	Splendor	27,33,585
HF Deluxe	11,48,254	HF Deluxe	14,08,356	HF Deluxe	18,83,047
Passion	11,39,576	TVS XL Super	8,90,518	CB Shine	9,87,271
CB Shine	7,98,699	Passion	8,70,382	Passion	9,30,996
TVS XL Super	7,23,767	CB Shine	7,77,006	Glamour	8,78,303
Glamour	6,79,147	Glamour	7,43,798	TVS XL Super	8,59,520
Pulsar	6,18,371	TVS Jupiter	6,13,838	TVS Jupiter	8,10,916
Bajaj CT	5,90,067	Pulsar	5,82,912	Pulsar	6,57,276
TVS Jupiter	5,37,451	Bajaj CT	4,52,712	Classic 350	5,55,513

Source: SIAM Data

### The Inception

Honda Motor Company set its foothold in India by entering into a joint venture with Kinetic and Hero group in the 1980s. Though the Kinetic Honda Group made an entry with a splash they failed to sustain in the long run and eventually ended their partnership in 1998. The other venture with Hero group was pretty much successful and it established the group as the top player in the motorcycle division. The Hero Honda Group had the perfect chemistry between them with Honda playing the role of technology partner and Hero group lending its expertise in Sales and Distribution. They are credited to usher in a motorcycle revolution which changed the perception of the consumers regarding two-wheelers in India. The scooter manufacturer who had championed themselves as the official vehicle of the Indian middle class slowly found themselves cornered with consumer preference changing from scooters to motorcycles. Slowly the perception started developing that scooters will play a peripheral role in future and motorcycles shall dominate the market. This verdict was sealed with Bajaj Auto announcing its decision to exit the scooter market and to focus solely on motorcycles. In the year 1999 Honda floated its fully own subsidiary with a specific agreement with its erstwhile partner Hero Moto Corp that it would focus on the automated scooter segment only and initially would not produce competing products in the motorcycle segment till much later. The joint venture ended in 2010-11 and now both companies were competing in the market place, though with specializations in different segments. Hero group went on to dominate the motorcycle segment becoming the largest two-wheeler manufacturer in the world while HSMI emerged as the market leader in the 4 stroke automated scooter business with a hefty market share of over 60% with Activa sharing a lion pie in the market share.

Activa enjoys the same pole position in the scooter market which splendour enjoys in the motorcycle segment. Activamanaged not only to change the industry perception about the scooter market but also opened a whole new market by positioning itself as a unisex vehicle.

It smartly envisaged the shift in demand pattern which was getting skewed towards females and promptly placed itself as a unique product which can cater to demands of both male and female.

However, during its launch in the year 2001, it did not have many takers in the market. The experts had pronounced that scooter market was dead in India and Bajaj was also doing well with its brand Pulsar after it had exited the scooter business. The sentiments were negative for scooter market and given the craze for motorcycles, no one was willing to bet on the scooter industry. The scooter market share in the total of two-wheelers sales in the country which had stood at 48% in 1994-95 had declined to 14.5% in the year 2004-05. In this gloomy scenario, the launch of Activa as a 4-stroke gearless scooter was viewed with grave scepticism by the experts. (Ritwik)

Initially, Activa witnessed a slow start with sales of around 55,000 units in its debut year, but then next two years saw exponential growth in three-digit numbers and by the end of the third year of operations Activa had managed to gain attention among the two-wheeler enthusiasts in the country with its sale volume touching to approx. 3.5 Lakh units (Ritwik). Though a majority of business analyst and the rival companies believed that Honda took a huge risk by launching a unisex scooter in the turbulent times that fact is Honda never played a blinder. The market sentiments were very positive for Activa in countries like Indonesia, Thailand, Vietnam etc, which clearly indicated that a new era of scooterisation defined by gearless products had begun and India could no longer remain aloof to this phenomenon. Recently India dislodged Indonesia as the largest market for Honda Scooters in the globe. The combined strength of sales of Honda Scooters and bike makes India the biggest global market for the two-wheeler division of the Japanese group. One noticeable feature is that Honda group is a big-time player in the car manufacturing industry but HSMI has carved out a separate entity for itself in the two-wheeler segment and works independently. Similarity can be drawn between Suzuki and Honda group where Suzuki also commands the largest market share in car segment and after breaking up

with TVS group has been manufacturing motorcycles independently in a separate company from Maruti Suzuki.

Another point to be noted was Honda had its root entrenched in the scooter business which helped them in taking a leap of faith by launching Activa scooters. Previously Honda had a joint venture deal with the Kinetic Group and were technology partners for Kinetic Honda scooters – India's first 2-stroke gearless scooters. Though after enjoying initial success both groups parted their ways

Honda had tested the Indian market which gave them the confidence to launch their new product. Activa became a game-changer for Honda motors which not only helped it move out of the shadow of Hero Group but also created a new segment for two-wheeler Industry and became the undisputed champion of gearless scooters in India. Rivals who were initially sceptical of this product are now scrambling to get a share of this pie.

Year	2Wheeler Industry	Honda 2 Wheeler India Sales		
		Total(SC +MC)	Mkt Share %	Growth %
2001-02	3,321,00	55,000	2	100
2002-03	50,53,000	1,66,300	3	202
2003-04	79,48,000	3,41,400	4	105
2004-05	65,76,000	5,51,100	8	61
2005-06	75,80,000	6,00,600	8	9
2006-07	84,82,000	7,15,300	8	19
2007-08	80,87,000	9,07,200	11	27
2008-09	84,81,000	10,70,200	13	18
2009-10	1,05,69,000	12,71,900	12	19
2010-11	1,33,97,000	16,58,053	12	30
2011-12	1,58,05,000	21,07,201	13	27
2012-13	15,811,00	27,54,584	17	31
2013-14	1,69,32,000	37,21,935	22	35
2014-15	1,84,62,000	44,52,295	24	20
2015-16	18,937,00	44,83,495	24	1
2016-17	1,99,09,000	50,08,230	25	12
2017-18	2,00,20,000	52,10,652	26	13
2018-19	2,10,18,000	51,09,323	24	11

Source –Ritwik Sinha Business India

### The Great Revival

The consistent decline in the market share of the scooter had created a negative perception in the mind of two-wheeler manufacturers but the entry of automated four-stroke scooter led to the metamorphosis of the whole scooter market. In the year 2009, the market share of scooters was only 11% but within a decade it rose to 30% and still there is no sign of fatigue (Preeti). For long time scooters had rule the hearts and minds of Indian middle class, though with the advancement in technology which led to greater mileage and comfort motorcycle became the first choice of the young working class, the gap was always felt. Motorcycles were a symbol of the mobility of masses but when it came to personal mobility it was defined more by individual personalities which matched more with scooters.

Another push for scooters came from the rising number of working women forces who preferred convenience over speed and scooters scored over motorcycles as a medium for transportation. Another brownie points earned by the scooters was high fuel efficiency which acted as a pull factor for both rural and urban customers. Activa was perceived by the consumers as an uncomplicated product

which could be used easily by all family members for local rides. Though initially the sale for gearless scooters were tepid, it gained momentum in the later years. The annual sales of scooters in the country had more than doubled between 2011-12 to 2016-17 -from 2,558,981 to 5,604,601 units (SIAM). The success of Activa mesmerized the other players and the scooter industry witnessed the entry of TVS, HeroMotoCorp, Yamaha, Piaggio and Suzuki. HMSI's scooter sales shot up to 3,189,102 units at the end of 2016-17 as against 1,224,379 in the year 2011-12 (SIAM). In the same period, TVS Scooter sales went up to 826,291 units from the base of 496,892 units in 2011-12. The sale of Hero Moto Corp nearly doubled from 414,389 units to 789,974 units for the year 2017-18 (SIAM). According to SIAM report, Two-wheelers sales crossed a staggering 20 million unit mark and scooters have contributed significantly to this figure. Two-wheeler sales registered a growth of 14.80 per cent in April- March 2018 over April – March 2017. Within the two-wheeler segments, scooter and motorcycle grew by 19.90 per cent and 13.69 per cent respectively while Mopeds declined by 3.48 per cent in April-March 2018 over April -March 2017 (SIAM).

### Scooter Domestic Sales

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
<b>Bajaj Auto</b>								
<b>Hero Moto Corp</b>	4,14,389	5,49,808	6,90,079	7,52,052	8,18,777	7,89,974	8,83,667	7,19,087
<b>Honda Motorcycle and Scooter India</b>	12,24,579	14,20,115	19,02,859	25,02,347	27,89,537	31,89,012	38,21,542	36,80,403
<b>India Yamaha Motor</b>		60,281	1,76,981	2,16,960	3,18,450	4,40,423	4,74,846	3,64,879
<b>Kinetic Motor Company</b>								

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
<b>Mahindra Two Wheelers</b>	1,34,518	1,01,530	47,180	46,349	84,064	34,308	12,836	9,896
<b>Piaggio Vehicles</b>		38,718	31,865	28,062	26,865	43,180	68,169	77,775
<b>Suzuki Motorcycle India</b>	2,88,603	3,28,766	2,96,804	2,75,190	2,20,388	2,80,783	4,21,539	6,15,520
<b>TVS Motor Company</b>	4,96,892	4,24,183	4,56,975	6,84,569	7,73,597	8,26,291	10,99,133	12,41,366
<b>Total</b>	25,58,981	29,23,401	36,02,743	45,05,529	50,31,678	56,04,601	67,81,732	67,08,926

Source – SIAM Data

A very interesting phenomenon which cropped out in recent years was robust demand of scooters for small town and villages. It was a perceived notion that due to small wheels and pathetic conditions of Indian road the demand of scooters shall be confined to metros and big cities, but contrary the demand from rural market has surpassed all expectations. Another reason for the increase in demand from the rural market was a unique feature which Honda offered – Tuff up Tube (a double-layered tube with a sealant) which prevented the tyres from getting punctured. This enabled them to answer the concern of rural customers about bad road conditions and high maintenance cost for two-wheelers.

One pertinent factor which led to the rapid rise of Honda scooters was its single-minded focus on a single product. During 1990 all major automobile players were focusing on increasing their product portfolio, Honda was bonded by the contract signed with Hero group was to stay away from motorcycle business and hence all its resources were diverted on improvising the scooter market. Their energy, dealer partnerships, design refinement, efforts to cater to products with unisex appeal etc were tied to basic rules of new-agescooterisation. Their efforts also got boost because of the growing popularity of Scooters in the ASEAN countries which slowly got inculcated in the

Indian market.

### The Business Model

The initial success of Activa gave Honda the confidence to expand its product portfolio and it launched two new scooter models – DIO and Eterno in quick succession. In a short span of time, Honda gave a very clear message that it meant serious business in the scooter category and claimed a dominant position in Scooter manufacturing. By the end of 2005, Honda was able to revive the scooter segment and capture more than 50% of the market share (Ritwik). In the same year, Honda entered the motorcycle segment by launching Unicorn in the 150cc category which was empowered by mono-shock suspension technology, introduced in the country for the first time. The later years were followed by the launch of new models – 125cc CB Shine (2006-07) and automated scooter Aviator (2007-08). By the time its contract ended with Hero group in the year 2011, Honda was able to create a rich product portfolio with deep product lines. These strings of success gave enough ammunition to HSMI group and it came up with all guns blazing to capture the market. It went for a massive expansion in its production capacity and launched various new models and upgrades with a clear focus on brand Activa. It launched an upgraded version of Activa I in the year 2013-14 and Activa 125cc in the following year. It

added another feather to its cap by becoming the second largest two-wheeler manufacturer in the country in the year 2012-13 and later CB Shine won the crown of largest selling bike in 125cc category.

### Product Portfolio

Segment	Models	Engine
New	NAVi	
ATSC	CLOQ	110cc
	Activa-i	
	Dio	
	Activa 4G	
	Aviator	
	Activa 125	125cc
	Grazia	
MC	CD110 Dream	110cc
	Dream Neo	
	Dream Yuga	
	Livo	
	CB Shine	125cc
	CB Shine SP	
	CB Unicorn	150cc
	CB Unicorn 160	160cc
	CB Hornet 160R	
Fun Bikes	CBR 650 F	650cc
	Africa Twin	1000cc
	CB1000R	
	CBR1000RR	
	Gold Wing	1800cc

Source – Ritwik Sinha Business India

Honda believed in the 3M formula for attracting the customers – Middle class, Middle-aged and Married. In a short period, it had won the trust of Indian masses and surpassed the existing brands like Bajaj and TVS. The brand Activa and Shine together accounted for more than half of the sales of the company. Their contribution to revenue generation was more than 60% and the majority of it came from domestic sales. In fact, India surpassed Indonesia to become the largest market for Honda two-wheelers.

Its separation from Hero group became a turning point for the company which led to massive investment in backend infrastructure for capacity expansion and a strong dealership network. HSMI group added three new plants – Tapukara in Rajasthan in 2011-12 with an annual capacity of 12 lakhs, Narsapura Karnataka (2013-14) with 18 lakhs Unit Capacity (now upscaled to 24 lakh units) and Vithalpur Gujarat (2016-17) at 24lakhs unit. This enabled its production capacity to grow from 1.6 million units in 2010-11 to 6.4 million units(Ritwik ). HSMI launched 15 new models in one single year and has invested Rs 9,800 crore till now in setting up their plants and distribution system in India. The dealer network which started with 60 associates has now grown up to 5,700 across the nation(Ritwik ). They boast of State of Art technology in production plants which can churn out scooter in every 40 sec. All their plants are located strategically to cover the entire nation and are now acting as major hubs to export of their products to overseas market.

### Honda 2 Wheelers Production Capacity in India

Year	Production ( M Units)
2010-11	1.6
2011-12	2.8
2012-13	3.2
2014-15	4.6
2015-16	5.4
2016-17	5.8
2017-18	6.4
2018-19	6.8

Source – Ritwik Sinha Business India

### Current Situation

HSMI spectacular success caught the fancy of other two-wheeler manufacturer and in a short period, all of them barring Bajaj Automobiles had jumped into the fray. This has led to wide varieties of options for the customers and the cost of wooing customer has gone up. Companies like TVS and Hero Moto corp have gained majorly from scooter business. TVS Jupiter has become a golden goose for the 201 company as it was able to clock a little less than 3 million sales in the year 2017. Its annual sales jumped by 15% and it made to the list of top ten selling two-wheelers brand in the country by cropping a mouth-watering sales figure of 8 lakh units in the year 2017-18.

Hero Moto Corp which has established absolute dominance in motorcycle business has now set its eyes on the scooter segment. The company presently has three models in its product portfolio – Pleasure, Maestro Edge and Duet each catering to different segments of consumers. It has been able to capture 14.1% of the market share and is planning to launch new models in 125cc categories to boost its sales. Global players like Suzuki, Yamaha and Piaggio have also ventured into the scooter business with each claiming to charm the customers with their unique offerings. They managed to carve a substantial market for themselves with Suzuki Access 125 enjoying 38 % market share in the 125cc category. Yamaha has also launched a series of models – Fasino, Cygnus Ray ZR Street Rally edition and is trying to offer mobility solutions with specific product characters.

HSMI has been benchmarked by all the rivals and they are leaving no stone unturned to offer serious competition to the market leader. To boost their brand image, they have resorted to hiring celebrities with TVS roping in Amitabh Bachchan Hero Motocorp having Ranbir Kapoor as their brand Ambassador. Honda has responded by hiring Akshay Kumar and Tapsee Pannu as their brand ambassador. The aggressive marketing strategy has managed to hold the competitors in the bay but Honda needs to be consistent with its innovative strategy to retain its top position

### The Dilemma

The Indian market has now become a twin edged sword for HSMI. The government has given the mandate to make all automobiles compliant with BSVI norms by 2020. The two-wheeler manufacturer is required to introduce fuel injection system which shall force them to overhaul their technology which in turn will impact their production capacity. This requires huge investment in terms of cash and manpower which might ultimately lead to a rise in product cost. HSMI has been consciously investing in setting up the right ecosystem for meeting the BS-VI norms. The increase in cost can lead to a decline in demand for their products especially from small towns and rural areas.

However, the biggest threat which it might face is in the form of electric vehicles which are expected to dominate the market. The government is keen to reduce the CO2 emissions and to bring down the fuel bill for which it has proposed for total electrification of two-wheelers by 2025. Though it does not have many takers presently because of inadequate business environment there are lots of start-ups which intend to disrupt the two-wheeler market. Its rivals like Hero MotoCorp and TVS group have already started investing in the development of infrastructure and technology for production. Bajaj Automobiles is planning to re-enter the scooter market with its range of electric scooters under the Urbanite brand. Hero MotoCorp has invested 130 crores in Atherenergy, a promising electric two-wheeler startup. TVS group plans to enter the scooter market under Creon brand projecting it as Performance-oriented and environment-friendly product. HSMI recently announced that it has no plans to launch electric vehicles in India till 2020. The company stated that it needs a cooling period to ensure a smooth transition from BS-IV norms to BS-VI norms and does not foresee much demand for electric vehicles soon. Though Honda group has got the expertise to manufacture electric vehicle it feels that due to infrastructure constraints and high-cost people will not be enthusiastic to purchase an electric vehicle. Their apprehensions cannot be disregarded totally as there are some serious roadblocks in their ambitious



targets to become a mass product. The battery of an average electric motorcycle takes 3-4 hrs on the AC charger to get fully charged and in high voltage, DC charger will take 20-25 minutes with an average range of 80-120 km. The time is taken to refuel a two-wheeler is less than 2 minutes, also the government needs to set up high charging point intensively to avoid long queues. Even if they try to set up specific charging points at fuel station it requires a major change in design as traditional fuel pumps allow vehicles to enter from one point, refuel at the centre and depart from another end with an average waiting time of fewer than 3 minutes. This eliminates congestion in the fuel stations which might not be possible if two-wheelers are coming for charging with average waiting time or more than 20 minutes. Moreover, the major portion of India still reels under power shortage problem marooned with power cuts and voltage problem. The government has to ensure uninterrupted power supply with steady voltage or else the average charging time will increase which seems an uphill task.

The cost is another bone of contention for electric vehicles as they are priced nearly double than their counterparts. Even if the average cost for running an electric two-wheeler is very low it will take minimum 3-4 years to recover the cost and average life a battery in a two-wheeler is 2- 3 years and their cost of replacement is approx. 15000. (Naveen). Their servicing is also a big challenge as enough manpower needs to be recruited and trained for their maintenance.

The two-wheeler market can witness a serious disruption with the majority of players barring Honda group focussing on electric vehicles and also start-ups like Ather, Tork motors and 22 motors striving to make their mark. Government is also determined to create a favourable ecosystem to electric vehicles and has drawn a blueprint of its ambitious scheme. The management of HSMI is still not convinced of this idea and as of now has adopted a wait and watch strategy but it has to take the call sooner or later or else it might lose out the market to its rivals.

### Learning objectives and key issues

1) The main issue in this episode is Product

Innovation and the dilemma which the company faces with regards to the launch of electric two-wheelers in India

- 2) HSMI had the strategic vision to identify the void created by Bajaj Automobiles by exiting the Scooter Business which led to the launch of Activa
- 3) The positioning of Honda as a unisex bike was readily accepted not only by Urban but by Rural consumers also which shows a huge change in consumer perception
- 4) Bajaj Automobiles are the only Two-wheeler manufacturer who is not present in the scooter business as they want to develop their core competency in bikes. This is a very tricky situation as they were the pioneer in scooter business and now, they have zero presence.

Shortly, Bajaj is planning to launch its electric scooters.

- 5) Launch of electric two-wheelers in Indian Market and the challenges which the organization might face in lieu of competition from traditional competitors and as well as from the startups like Ether and Tork who are aggressively launching their product.

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**Anuj Verma** earned his MBA from IITTM Gwalior and PhD From Ranchi University and is associated with Symbiosis International University Nagpur. His professional interest includes Marketing Management, Retail Management and Integrated Marketing Communication. He can be contacted at [anuj.verma@sibmnagpur.edu.in](mailto:anuj.verma@sibmnagpur.edu.in)

**Meenakshi Verma** earned her MBA from IITTM Gwalior and PhD From Ranchi University and is associated with Symbiosis International University Nagpur. Her professional interest includes Human Resource Management, Industrial Relations and Compensation Management. She can be contacted at [meenakshi.verma@scmsnagpur.edu.in](mailto:meenakshi.verma@scmsnagpur.edu.in)