

**Automakers in China Fail to Make More Appealing New-Generation Models, J.D. Power Finds**Porsche and Buick Rank Highest Among Luxury and Mass Market Brands

**SHANGHAI: 9 Oct. 2020** – Although automakers in China continue to introduce redesigned and newly designed models to the market, they fail to meet the evolving consumer demands in vehicle appeal, according to the J.D. Power 2020 China Automotive Performance, Execution and Layout (APEAL) Study,<sup>SM</sup> released today.

The study, now in its 18th year, examines new-vehicle owners' assessments of their experiences with their new vehicles within the first two to six months of ownership and the data is used extensively by manufacturers to help them design and develop more appealing models. The study has been redesigned for 2020, which marks the fourth generation of the study.

"The APEAL Study measures owners' emotional attachment to their new vehicle and in what areas their vehicle may not be delivering on all of the positive experiences that were hoped for," said **Edward Wang, managing director of syndicated research at J.D. Power China**. "This study, together with J.D. Power's annual China Initial Quality Study (IQS) and China Technology Experience Index (TXI) Study, are three dimensions automakers can utilize to evaluate the power of product. Understanding vehicle appeal is just as valuable to automakers as knowing about quality issues and owner acceptance of new technologies."

The study shows that among redesigned and newly designed models, which account for 16% of all models surveyed this year, owners' appeal satisfaction is 732 points (on a 1,000-point scale), the same as owners' satisfaction with carry-over models. Among the 10 vehicle experience groups covered by the study, new models perform better only on fuel usage. In addition, among the 18 award recipient models, only two are new models.

"As the competition in the automotive industry intensifies, automakers in China continue to launch redesigned and newly designed models in response to the changing preferences and demands of consumers," said **Jeff Cai, general manager of auto product at J.D. Power China**. "However, automakers are failing to make more appealing vehicles due to the homogeneity of materials, features and appearances, among other things. Designing and developing attractive new models to get better market performance poses a big challenge to automakers' new product development."

"Automakers are facing an increasingly differentiated market of consumer groups and products, which means they need to take the individualized needs of customers into consideration in the early phase of product design and development," Cai added.

Following are additional findings of the 2020 study:

- **APEAL scores improve for almost all brands except Korean:** The APEAL score of the U.S. brands increases to 737 points from 713 points in 2019. Japanese brands (737 points) and European brands (736 points) improve 20 points and 14 points, respectively, compared with 2019. The score for Korean brands (734 points) is three points lower than in 2019. Chinese domestic brands make significant progress year over year, to 718 points from 683 points, but there is still a lot of room for improvement.

- **The installation rate of safety/assistant driving features in China is much lower than in the U.S.:** The installation rate of adaptive cruise control in the U.S is 77% compared with only 17% in China. The installation rate of the lane-keeping assist feature in the U.S. is five times that in China.
- **Younger vehicle owners more satisfied with newer models:** Vehicle owners born in the 1990s are more satisfied with their experience with new models (744 points) than with carry-over models (738 points), while owners born before 1990 take the opposite view. Using intelligent devices to operate the vehicle remotely and built-in navigation system are two features that illustrate this: owners born in the 1990s are more satisfied with these features in new models than in carry-over models, while satisfaction with these features among owners born before 1990 is higher for carry-over models than new models.

## Study Rankings

**Porsche** ranks highest in APEAL among luxury brands, with a score of 770. **Jaguar** (757) ranks second and **BMW** (748) ranks third. **Buick** is the highest-ranked mass market brand, with a score of 745. **Dongfeng Nissan** (744) ranks second and **FAW Toyota** (741) ranks third.

There are 18 award recipient models in the 2020 study. The segment-level APEAL awards by brand are the **Buick Verano; Buick Envision and Buick New GL8; Honda Fit, Honda City Fengfan and Honda Avancier; Mercedes-Benz C-Class and Mercedes-Benz E-Class;** and **Porsche Macan and Porsche Cayenne.**

Other models that rank highest in their respective segments are **Baojun RM-5; Changan CS35; GAC Trumpchi GM6; Geely Binrui; Infiniti QX50; Kia Pegas; Nissan Qashqai;** and **Volkswagen CC.**

The 2020 China Automotive Performance, Execution and Layout (APEAL) Study measures owners' emotional attachment to and level of excitement with their new vehicle across 37 attributes in 10 vehicle experience groups: exterior; setting up and starting; getting in and out; interior; performance; driving feel; keeping your safe; infotainment; driving comfort; and fuel economy.

The study is based on responses from 32,046 owners who purchased their new vehicle between June 2019 and June 2020. The study includes 241 models from 57 different brands and was fielded from December 2019 through August 2020 in 70 major cities across China.

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NOTE: Four charts follow.

# J.D. Power 2020 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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## 2020 APEAL Brand Index Ranking - Luxury (Based on a 1,000-point scale)



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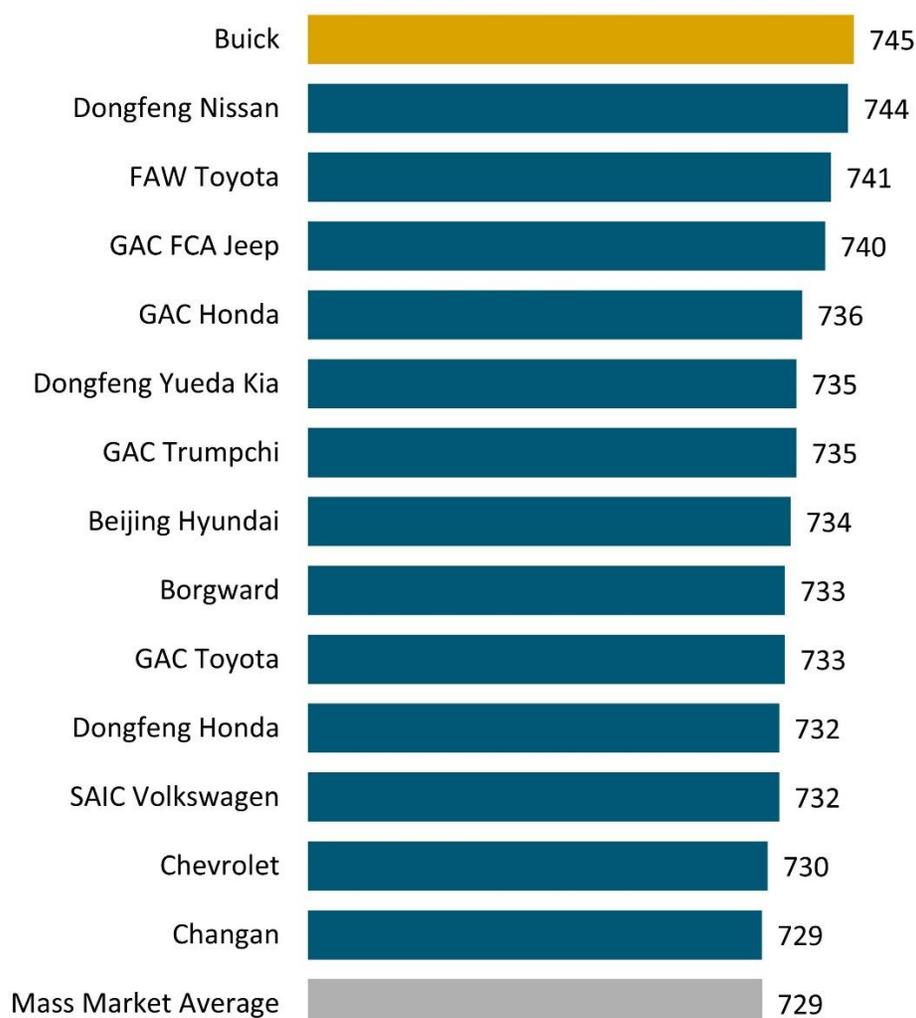
Source: J.D. Power 2020 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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## 2020 APEAL Brand Index Ranking – Mass Market

(Based on a 1,000-point scale)



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# J.D. Power 2020 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

## Top Three Models per Segment in APEAL Car Segment

<b>Compact*</b>  <b>Highest Ranked: Kia Pegas</b>	<b>Midsize Upper Economy</b>  <b>Highest Ranked: Buick Verano</b> Hyundai Mistra Volkswagen Lamando
<b>Compact Upper</b>  <b>Highest Ranked: Honda Fit</b> Toyota Vios/Vios FS Kia KX Cross (tie) Volkswagen Polo (tie)	<b>Midsize Upper</b>  <b>Highest Ranked: Volkswagen CC</b> Toyota Avalon Nissan Teana
<b>Midsize Basic</b>  <b>Highest Ranked: Honda City Fengfan</b> Volkswagen Santana Geely Vision	<b>Compact Luxury</b>  <b>Highest Ranked: Mercedes-Benz C-Class</b> Audi A5 (tie) Jaguar XEL (tie)
<b>Midsize</b>  <b>Highest Ranked: Geely Binrui</b> Nissan Tiida Nissan Sylphy	<b>Midsize Luxury*</b>  <b>Highest Ranked: Mercedes-Benz E-Class</b> Audi A6L

\* No other model in this segment performs above segment average.

Note: To qualify for an award in the 2020 China APEAL Study, models must meet these criteria: 1. Four models with at least 100 samples, or, three models with at least 100 samples and with more than 80% of market share. 2. At least one model must perform better than segment average. In the Large Luxury Car segments, these criteria were not met, thus no awards have been issued.

Source: J.D. Power 2020 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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# J.D. Power 2020 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

## Top Three Models per Segment in APEAL SUV, MPV Segment

<p>Small SUV</p> <p><b>Highest Ranked: Changan CS35</b> GAC Trumpchi GS3 Geely Vision X3</p>	<p>Midsized Luxury SUV</p> <p><b>Highest Ranked: Porsche Macan</b> BMW X3 Cadillac XT5</p>
<p>Compact SUV</p> <p><b>Highest Ranked: Nissan Qashqai</b> Toyota IZOA Nissan Kicks</p>	<p>Large Luxury SUV</p> <p><b>Highest Ranked: Porsche Cayenne</b> Audi Q7 BMW X5</p>
<p>Midsized SUV</p> <p><b>Highest Ranked: Buick Envision</b> Haval H6 Coupe Dongfeng Fengshen AX7 (tie) GAC Trumpchi GS5 (tie)</p>	<p>Compact MPV</p> <p><b>Highest Ranked : Baojun RM-5</b> Baojun 360 Bojun 730</p>
<p>Large SUV</p> <p><b>Highest Ranked: Honda Avancier</b> Nissan Murano Volkswagen Teramont</p>	<p>Midsized MPV*</p> <p><b>Highest Ranked: GAC Trumpchi GM6</b> Geely Jiaji</p>
<p>Compact Luxury SUV</p> <p><b>Highest Ranked: Infiniti QX50</b> Lexus NX BMW X1</p>	<p>Large MPV*</p> <p><b>Highest Ranked: Buick New GL8</b> Buick All New GL8</p>

\* No other model in this segment performs above segment average.

Note: To qualify for an award in the 2020 China APEAL Study, models must meet these criteria: 1. Four models with at least 100 samples, or, three models with at least 100 samples and with more than 80% of market share. 2. At least one model must perform better than segment average. In the Large Luxury Car segments, these criteria were not met, thus no awards have been issued.

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