

Electric Vehicles Made by China Startups Are Much More Appealing to Owners, J.D. Power Finds

ORA R1, Changan Eado EV, XPeng P7, NIO ES8 and Li ONE Rank Highest in Respective Segments

SHANGHAI: 29 July 2021 – New energy vehicles (NEVs) made by China startup automakers are much more appealing to vehicle owners in that country than are NEVs made by international and domestic traditional automakers, according to the inaugural J.D. Power China New Energy Vehicle–Automotive Performance, Execution and Layout (NEV-APEAL) Study,SM released today.

The study examines NEV owners' assessments of their new vehicles within the first two to six months of ownership. The data is used extensively by NEV manufacturers to design and develop more appealing models. In 2021, the average APEAL score for Chinese NEV vehicles is 735 (on a 1,000-point scale).

The study shows that NEV-APEAL satisfaction among owners of vehicles manufactured by Chinese startups (754) is 20 points higher than for international automaker NEVs (734) and 24 points higher than for those of domestic traditional automakers (730). Chinese startup automakers also show significant advantages in score over these other manufacturers in each of 11 the categories the study measures, such as exterior, interior, performance, infotainment, driving range and charging experience.

"The leading position of Chinese startups in all aspects of vehicle appeal owing largely to their unique concept and approach to making vehicles," said **Jeff Cai, general manager of auto product practice at J.D. Power China**. "Instead of focusing on functions, Chinese startups plan, design and produce vehicles from the perspectives of customer experience and the value to customers. The user-centric concept and approach determines the competitive advantages in vehicle appeal of Chinese startups, which is also the biggest inspiration to other brands."

Following are some key findings of the 2021 study:

- **NEV owners care more about vehicle design and styling:** Owners who bought a NEV primarily because of attractive design and styling account for 14%, followed by good quality (11%) and performance (9%). Conversely, among owners of ICE (internal combustion engine) vehicles, design and styling comes in third (9%), following quality (15%) and performance (13%)^①.
- **NEVs perform better than ICE vehicles in exterior styling:** Although the total APEAL score for NEVs is just three points higher than for ICE vehicles^②, their APEAL score in exterior styling is 16 points higher than for ICE vehicles.
- **Small BEVs lag far behind industry average and luxury PHEVs are well above:** The APEAL score for small battery electric vehicles (BEVs) is 720, 15 points below the industry average, while the score for luxury plug-in hybrid electric vehicles (PHEVs) is 17 points higher than average and for luxury BEVs is 14 points higher than average.
- **NEV owners prefer personalized colors:** NEV owners prefer grey, blue and red body colors while ICE vehicle owners prefer white, black and silver body colors. In terms of seat color, NEV owners choose grey 62% more often than do ICE vehicle owners.

^① Primary purchase reason of ICE vehicle owners comes from J.D. Power 2021 China Sales Satisfaction Index (SSI) Study.

^② APEAL score of ICE vehicles comes from J.D. Power 2020 China Automotive Performance, Execution and Layout (NEV-APEAL) Study.

Highest-Ranked Models

Models that rank highest in their respective segment are: **ORA R1** in the small BEV segment; **Changan Eado EV** in the compact BEV segment; **XPeng P7** in the midsize BEV segment; **NIO ES8** in the luxury BEV segment; and **Li ONE** in the mass market PHEV segment. In the luxury PHEV segment, criteria for awards were not met, thus no awards are given this year in this segment.

The J.D. Power China New Energy Vehicle–Automotive Performance, Execution and Layout (NEV-APEAL) Study measures NEV owners' emotional attachment to and level of excitement with their new vehicle across 45 attributes in 11 vehicle experience categories: exterior; setting up and starting; getting in and out; interior; performance; driving feel; keeping you safe; infotainment; driving comfort; fuel economy and driving range; and charging experience.

The study is based on responses from 3,976 new energy vehicle owners who purchased their vehicle between September 2020 and March 2021. The study includes 50 models from 28 different brands, among which 32 models from 18 brands have sufficient samples. The study was fielded from March through May 2021 in 53 cities across China.

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NOTE: One chart follows.

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Top Three Models per Segment

Small Battery Electric Vehicle

Highest Ranked: ORA R1
Second Ranked: ORA R2
Third Ranked: Chery eQ1

Midsize Battery Electric Vehicle

Highest Ranked: XPeng P7
Second Ranked: Aion S
Third Ranked: BYD Han BEV

Compact Battery Electric Vehicle*

Highest Ranked: Changan Eado EV
Second Ranked: XPeng G3

Luxury Battery Electric Vehicle*

Highest Ranked: NIO ES8
Second Ranked: NIO ES6

Mass Market Plug-In Hybrid Electric Vehicle*

Highest Ranked: Li ONE

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

Note: To qualify for an award in the 2021 China New Energy Vehicle–Automotive Performance, Execution and Layout (NEV-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 Luxury PHEV segment, these criteria were not met, thus no awards have been issued.

Source: J.D. Power 2021 China New Energy Vehicle–Automotive Performance, Execution and Layout (NEV-APEAL) Study

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