

**Satisfaction Gap between New Mass Market and Premium Vehicles Continues to Grow, J.D. Power Finds**Porsche, Buick and Geely Rank Highest in Respective Segments

**SHANGHAI: 17 Aug. 2023** – Overall satisfaction with new mass market vehicles has improved, but the gap between mass market and premium brands continues to widen, according to the J.D. Power 2023 China Automotive Performance, Execution and Layout (APEAL) Study,<sup>SM</sup> released today. The overall APEAL satisfaction score is 738 (on a 1,000-point scale), up 8 points from 2022, the highest score in the past four years. The score among premium brands has increased to 757 points this year from 744 points in 2022. The gap between premium brands and mass-market international brands (738 points) has widened to 19 points from 12 points last year and the gap with domestic brands (722) is 35 points, up from 715 points year over year.

The study, now in its 21st year, examines owners' assessments of their new-vehicle experience within the first two to six months of ownership, specifically their emotional attachment to and level of excitement with their new vehicle. The resulting data is used extensively by manufacturers to help them design and develop more appealing models.

"With the growth of new energy vehicle (NEV) sales, the competition between internal combustion engine vehicles (ICE) and NEVs is becoming fiercer," said **Elvis Yang, general manager of auto product practice at J.D. Power China**. "Makers of ICE vehicles need to pay more attention to vehicle design and experience to maintain their position. Meanwhile, second- and third-tier cities are the main areas to purchase ICE vehicles. Automakers need to accurately grasp the preferences of this consumer group, optimize configuration experience to increase product appeal."

Following are key findings of the 2023 study:

- **ICE and NEV each have their own strengths:** Although the APEAL score for ICE vehicles has improved this year—738 vs. 730 a year ago—the gap with NEVs (776) has expanded to 38 points. The breakthrough directions of the two types of vehicles are different. NEVs score higher in design; setting up and starting; and driving experience, while traditional ICE vehicles score higher in fuel economy and driving range; security; in-vehicle infotainment system; and driving comfort.
- **New energy SUVs are significantly ahead of gas-powered SUVs in design:** Year over year, the APEAL score for gas-powered SUVs (736) has increased 6 points, while the score for new energy SUVs (783) has significantly improved 38 points. Design is the main reason for the gap between the two types of SUVs. Design is also the main reason for buyers to reject gas-powered SUVs. Buyers prefer several design aspects for new energy SUVs rather than those available on gas-powered SUVs, such as the color, and the size and shape of the side windows.
- **First-time buyers in second-tier cities pay more attention to the practicality of functions:** As the main market for ICE vehicles, first-time purchasers in second-tier cities are mostly young people with rigid demands. Daily commuting is their main vehicle use. Among these buyers, APEAL attributes scoring higher this year are infotainment systems, up 14 points from 2022, and keeping you safe, up 13 points. More practical functions such as safety configuration; controlling the vehicle in and out of tight spaces; assisted driving functions; and infotainment systems are the most frequently cited features used by these buyers.

## Study Rankings

**Porsche** ranks highest in APEAL among premium brands with a score of 763. **Audi** (760) ranks second and **BMW** (758) ranks third.

**Buick** is the highest-ranking mass market brand with a score of 755. **Dongfeng Nissan** (747) and **GAC Honda** (747) each rank second in a tie.

**Geely** ranks highest among Chinese domestic brand with a score of 744. **Chery** (741) ranks second and **Roewe** (740) ranks third.

The segment-level APEAL awards by brand are for **Audi A6L, Audi Q3, Buick All New GL8, Buick Envision Plus, Buick Excelle GT, Changan CS35 Plus, Changan CS75, Chery Tiggo 7 Plus, Chery Tiggo 8, Geely Emgrand** and **Geely Preface**.

Other models that rank highest in their respective segments are **BMW 3 Series, Dongfeng Forthing Lingzhi, Honda Crider, Honda Inspire, Mercedes-Benz GLC-Class, Porsche Cayenne,** and **Toyota Wildlander**.

The 2023 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 35,155 owners of gas-powered vehicles who purchased their new vehicle between June 2022 and March 2023. The study includes 230 models from 48 different brands and was fielded from December 2022 through May 2023 in 81 major cities across China. Additionally, data from the J.D. Power China New Energy Vehicle—Automotive Performance, Execution and Layout (NEV-APEAL) Study,<sup>SM</sup> which measures the APEAL satisfaction of NEV owners, is included for comparison in this study.

To learn more about the China Automotive Performance, Execution and Layout (APEAL) Study, please contact: [china.marketing@jdpa.com](mailto:china.marketing@jdpa.com)

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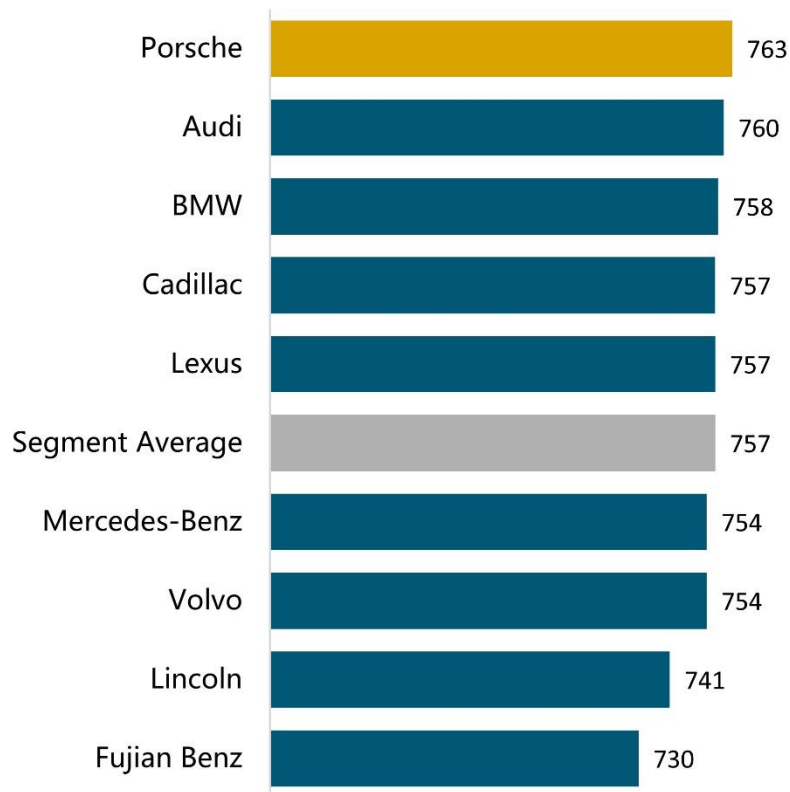
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NOTE: Seven charts follow.

# J.D. Power 2023 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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## APEAL Brand Index Ranking Premium Brands *(Based on a 1,000-point scale)*



*Notes: In alphabetical order if there are tie scores.  
Scores are not shown for insufficient brand (n<=29): Land Rover*

*Source: J.D. Power 2023 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>*

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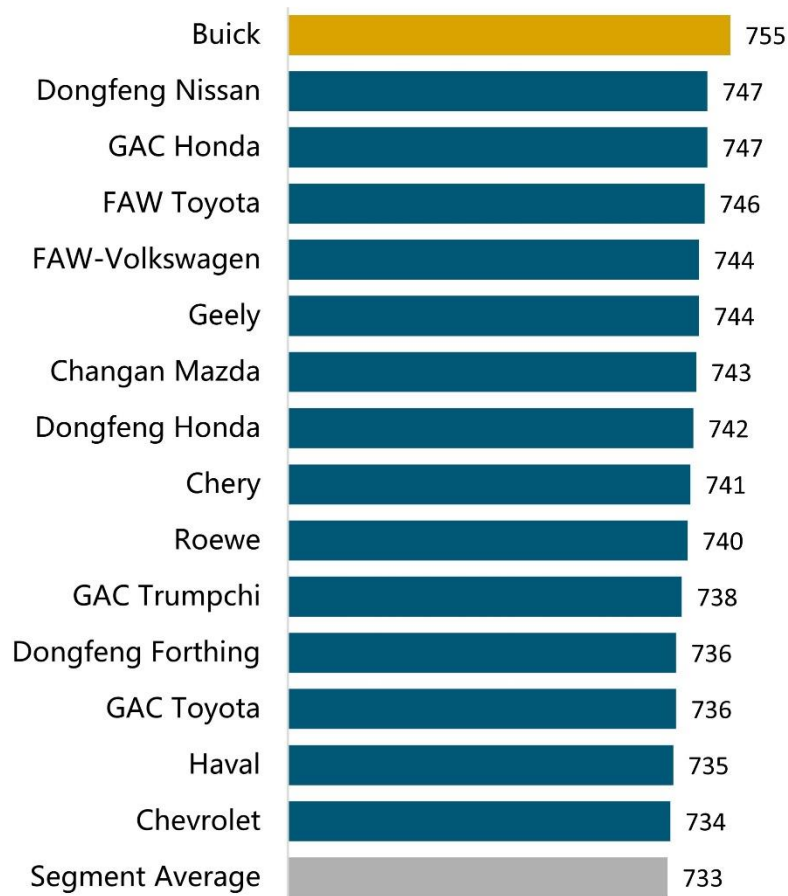
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### APEAL Brand Index Ranking Mass Market Brands (1/2)

(Based on a 1,000-point scale)



Notes: In alphabetical order if there are tie scores.

Source: J.D. Power 2023 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

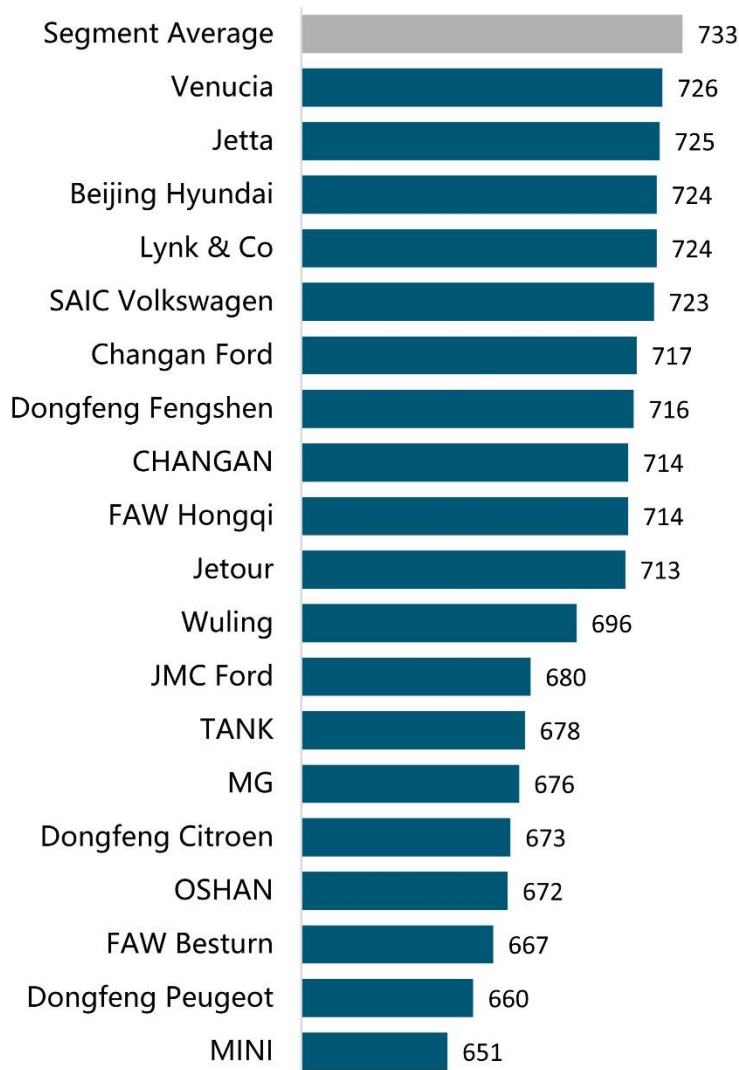
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### APEAL Brand Index Ranking Mass Market Brands (2/2)

(Based on a 1,000-point scale)



Notes: In alphabetical order if there are tie scores.

Scores are not shown for small sample brands (n=30~99): GAC Mitsubishi, BAICORV, Maxus and insufficient brand (n<=29): Kia.

Source: J.D. Power 2023 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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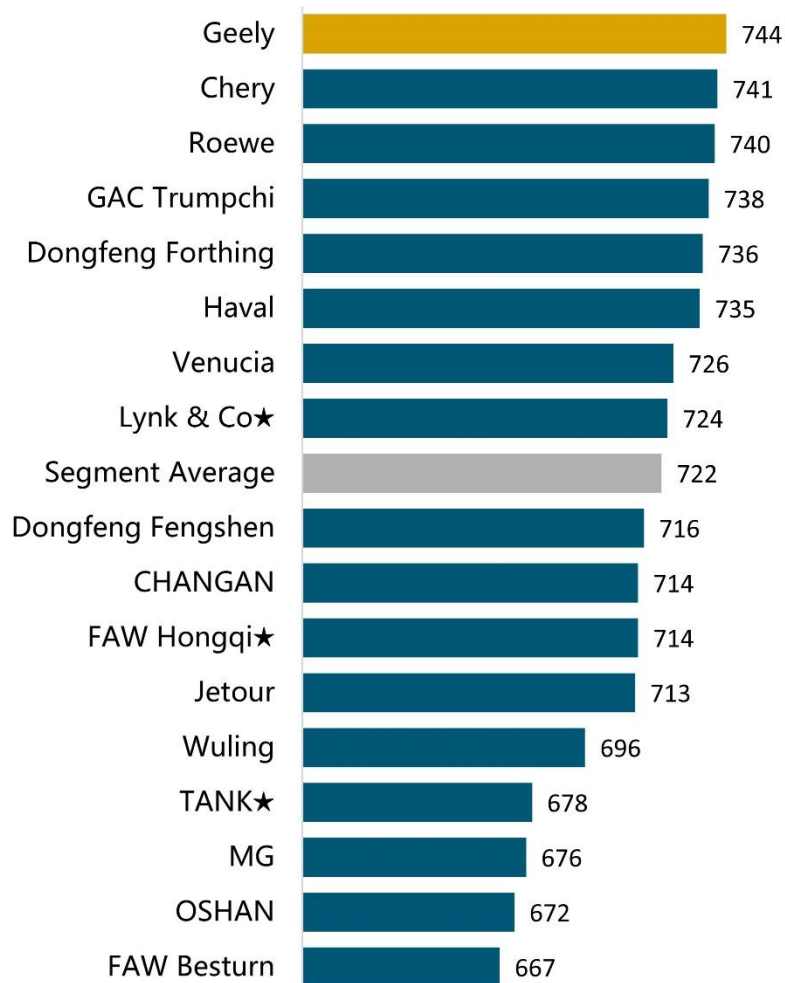
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### APEAL Brand Index Ranking

#### Domestic Brands

(Based on a 1,000-point scale)



Notes: In alphabetical order if there are tie scores.

Scores are not shown for small sample brands (n=30~99): BAICORV, Maxus.

★ are Chinese premium brands defined as domestic brands whose premium models contribute more than 50% of its total sales; Premium models are defined as those with an average MSRP of more than RMB 150,000.

Source: J.D. Power 2023 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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## 2023 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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### Top Three Models per Segment Car Segment

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#### Compact Car

**Highest Ranked: Geely Emgrand**  
Second Ranked: Roewe i5  
Third Ranked: Toyota Vios/Vios FS

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#### Compact Upper Car

**Highest Ranked: Buick Excelle GT**  
Second Ranked: Toyota Yaris L  
Third Ranked: Volkswagen Santana

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#### Compact Premium Car

**Highest Ranked: BMW 3 Series**  
Second Ranked: Cadillac CT5  
Third Ranked: Lexus ES

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#### Midsize Economy Car

**Highest Ranked: Honda Crider**  
Second Ranked: Nissan Sylphy Classic  
Third Ranked: Toyota Corolla

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#### Midsize Car

**Highest Ranked: Geely Preface**  
Second Ranked: Volkswagen Lamando L  
Third Ranked: Volkswagen Sagitar

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#### Midsize Upper Car

**Highest Ranked: Honda Inspire**  
Second Ranked: Honda Accord  
Third Ranked: Buick Regal

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#### Midsize Premium Car\*

**Highest Ranked: Audi A6L**  
Second Ranked: BMW 5 Series

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

Note: To qualify for an award in the 2023 China Automotive Performance, Execution and Layout (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 premium car segment, these criteria were not met, thus no award has been issued.

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Source: J.D. Power 2023 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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## 2023 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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### Top Three Models per Segment SUV Segments

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#### Compact SUV

**Highest Ranked: Changan CS35 Plus**  
Second Ranked: Geely Vision X6 Pro  
Third Ranked: Haval M6 Plus

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#### Compact Upper SUV

**Highest Ranked: Changan CS75**  
Second Ranked: Jetta VS5  
Third Ranked: Lynk & Co 06

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#### Compact Premium SUV

**Highest Ranked: Audi Q3**  
Second Ranked: Mercedes-Benz GLA-Class  
Third Ranked: Lexus NX

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#### Midsized Economy SUV

**Highest Ranked: Chery Tiggo 7 Plus**  
Second Ranked: Changan UNI-T  
Third Ranked: Honda XR-V

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#### Midsized SUV

**Highest Ranked: Chery Tiggo 8**  
Second Ranked: Haval Big Dog  
Third Ranked: Dongfeng Fengshen Haoji

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#### Midsized Upper SUV

**Highest Ranked: Toyota Wildlander**  
Second Ranked: Chery Tiggo 8 Plus (tie)  
Second Ranked: Geely Xingyue L (tie)

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#### Midsized Premium SUV

**Highest Ranked: Mercedes-Benz GLC-Class**  
Second Ranked: Volvo XC60  
Third Ranked: Lexus RX

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#### Large SUV

**Highest Ranked: Buick Envision Plus**  
Second Ranked: GAC Trumpchi GS8  
Third Ranked: Volkswagen Talagon

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#### Large Premium SUV\*

**Highest Ranked: Porsche Cayenne**

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

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## 2023 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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### Top Three Models per Segment MPV Segments

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#### Compact MPV\*

**Highest Ranked: Dongfeng Forthing Lingzhi**  
Second Ranked: Wuling Hongguang S

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#### Large MPV

**Highest Ranked: Buick All New GL8**  
Second Ranked: Honda Odyssey  
Third Ranked: GAC Trumpchi M8

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

*Note: To qualify for an award in the 2023 China Automotive Performance, Execution and Layout (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 midsize MPV and premium MPV segments, these criteria were not met, thus no awards have been issued.*

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*Source: J.D. Power 2023 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>*

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