

### Premium Vehicle Customer Service Satisfaction Significantly Improves, J.D. Power Finds

Audi, GAC Honda, FAW Hongqi, GAC Trumpchi and Geely Rank Highest in Respective Segments

**SHANGHAI: 28 Sept. 2023** — Customer service satisfaction in China has improved 2 points overall to 759 (on a 1,000-point scale) from a year ago, according to the J.D. Power 2023 China Customer Service Index (CSI) Study,<sup>SM</sup> released today. Satisfaction among owners of premium vehicles has significantly increased to 785, up 17 points year over year, while scores for mass market vehicles (753) declined 2 points from 2022.

The China Customer Service Index (CSI) Study, now in its 23<sup>rd</sup> year, measures satisfaction with after-sales service at authorized dealers in the past 12 months among owners of one- to four-year-old vehicles.

The study finds that the factors for reservation, service quality and service value have the highest declines in satisfaction among both international mass market brands and Chinese domestic brands. Specifically, declines in these three factors for international mass market brands are down between four and six points from 2022 (to 746, 756 and 752, respectively) and have declined between three and five points year over year for Chinese domestic brands (to 746, 753 and 749, respectively).

“We find that owners of internal combustion engine (ICE) vehicles in China have higher service expectations and it is becoming more difficult to improve overall satisfaction among this group of owners,” said **Ann Xie, general manager of the digital retail consulting practice at J.D. Power China**. “With the continuous innovation in service of new energy vehicles (NEVs), such as the digital reservation, service package, membership integrating system and service benefits. Owners of ICE vehicles have higher expectations for services, and how to further improve service satisfaction has become a challenge.”

Following are additional findings of the 2023 study:

- **ICE vehicle automakers should put more effort into app operation:** In 2023, the installation rate of apps in ICE vehicles is 46.7% (up 8.9 percentage points from 2022), daily use rate is 8.7% (up 1.5 percentage points from 2022) and the appointment online rate is just 8.4% (up 0.7 percentage points from 2022). There is a wide gap in operation between ICE vehicle apps and EV apps, with EV apps' 32.4% daily use rate and 11.1% appointment online rate. The study shows that usage of the app leads to more service needs and additional revenue for the dealership, as 57.5% of daily active owners say they will accept recommendations for additional service.
- **Service package significantly improves customer satisfaction:** Satisfaction averages 782 among customers with a service package who paid for service but declines to 759 among customers without a service package who paid for service. However, the ICE vehicle service package purchase rate is only 10.1%, which is 12.3% lower than that for NEV service packages (22.4%).
- **First-time purchasers are more likely to receive service recommendations:** Even if first-time vehicle purchasers who receive service recommendations from the service advisor do not accept them, satisfaction is 2 points higher than that of first-time purchasers who do not receive recommendations. Satisfaction among those who have accepted recommendations increases 18 points.
- **Three signals of customer loss:** Customers who have used unauthorized stores for routine maintenance, general repair or accident car repair are more likely to be lost to authorized dealerships. The churn rate for these lost customers is 26.5%, which is 2.3 times higher than the average for

authorized dealerships. Lost customers are most likely to be high-value owners, or those who spend nearly two times more than the industry average per year on service.

## Study Rankings

**Audi** ranks highest in customer service satisfaction among premium brands with a score of 798. **Land Rover** ranks second with a score of 786. **Cadillac** (785) and **Mercedes-Benz** (785) rank third in a tie.

**GAC Honda** ranks highest in customer service satisfaction among mass market brands with a score of 778.

**FAW Hongqi**, **GAC Trumpchi** and **Geely** rank highest in a tie among Chinese domestic brands and rank second among mass market brands, each with a score of 771.

The China Customer Service Index (CSI) Study measures customer satisfaction based on six factors: service team (19%); service facility (18%); welcome and diagnostic (18%); service quality (16%); service value (16%); and reservation (12%).<sup>①</sup>

The 2023 China Customer Service Index (CSI) Study is based on responses from 37,889 vehicle owners of 45 automotive brands in 81 major cities who purchased their new ICE vehicle between December 2018 and May 2022. The study was fielded from January through June 2023.

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NOTE: Four charts follow.

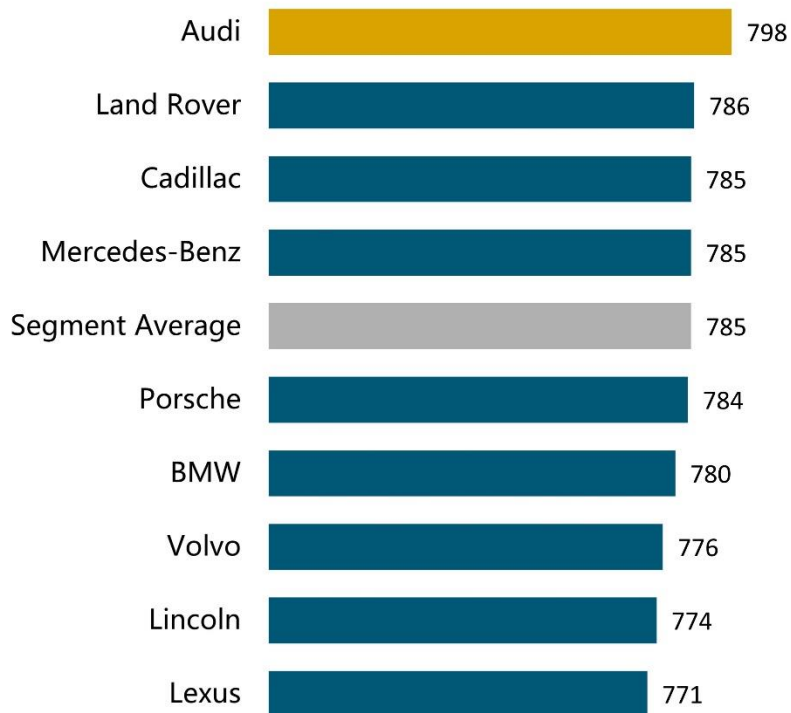
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<sup>①</sup> The weights are presented in rounded form, and the actual calculation is based on decimal places.

# J.D. Power 2023 China Customer Service Index (CSI) Study<sup>SM</sup>

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## Premium Brands (Based on a 1,000-point scale)



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Source: J.D. Power 2023 China Customer Service Index (CSI) Study<sup>SM</sup>

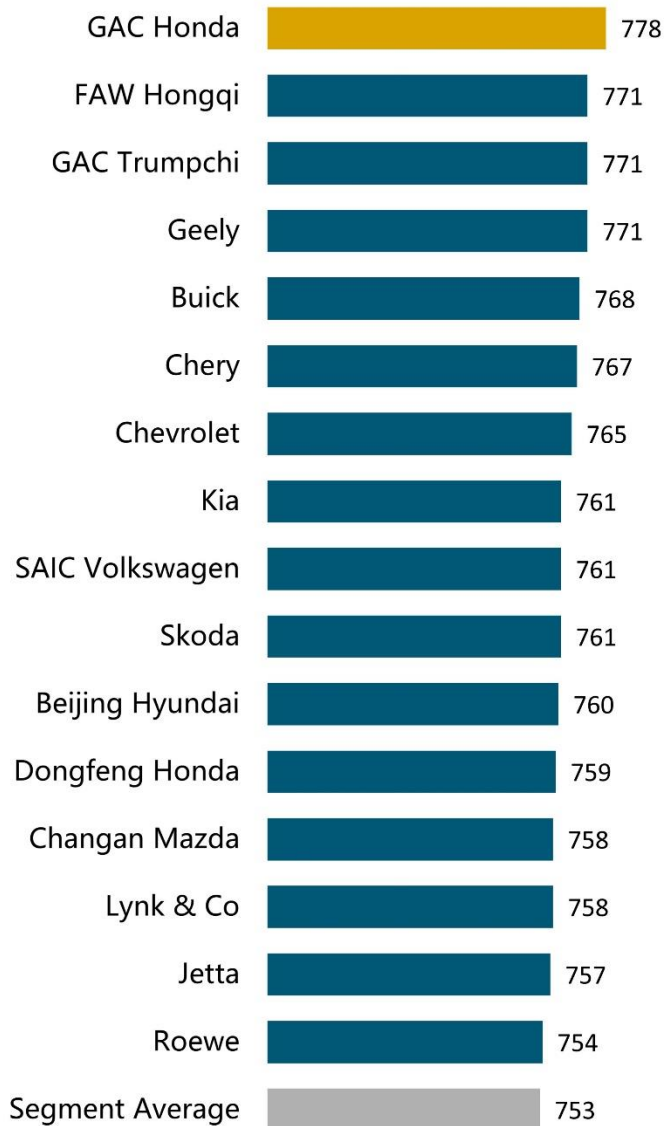
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## Mass Market Brands (1/2)

(Based on a 1,000-point scale)



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Source: J.D. Power 2023 China Customer Service Index (CSI) Study<sup>SM</sup>

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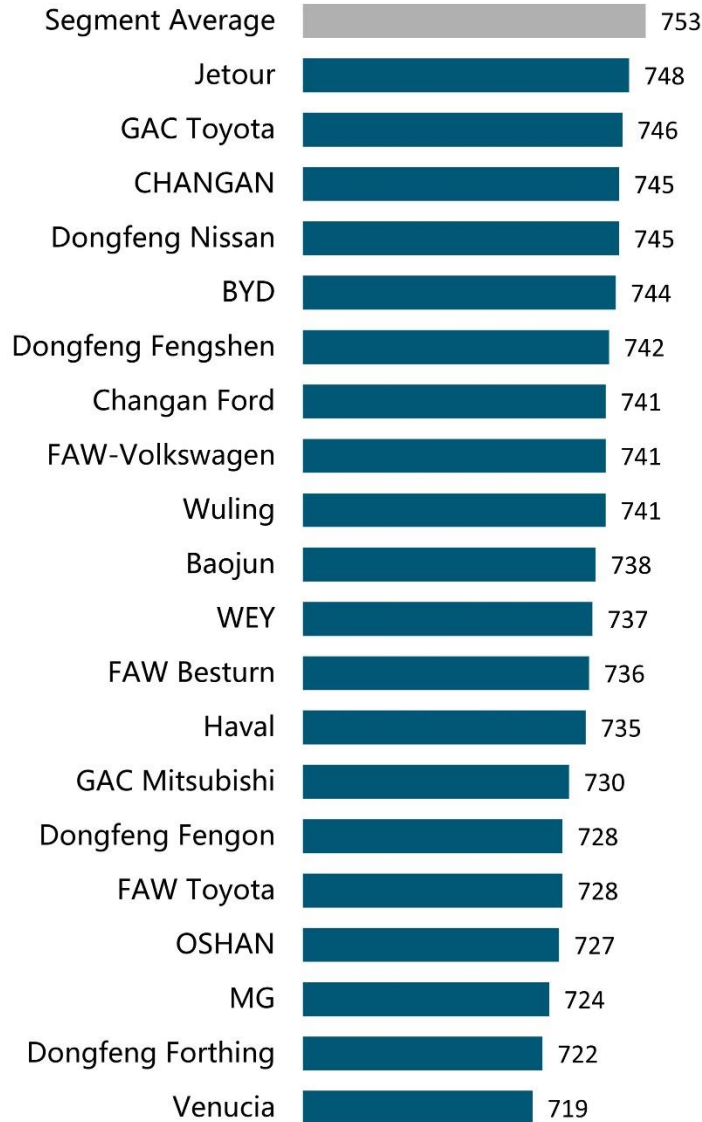
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## 2023 China Customer Service Index (CSI) Study<sup>SM</sup>

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### Mass Market Brands (2/2)

(Based on a 1,000-point scale)



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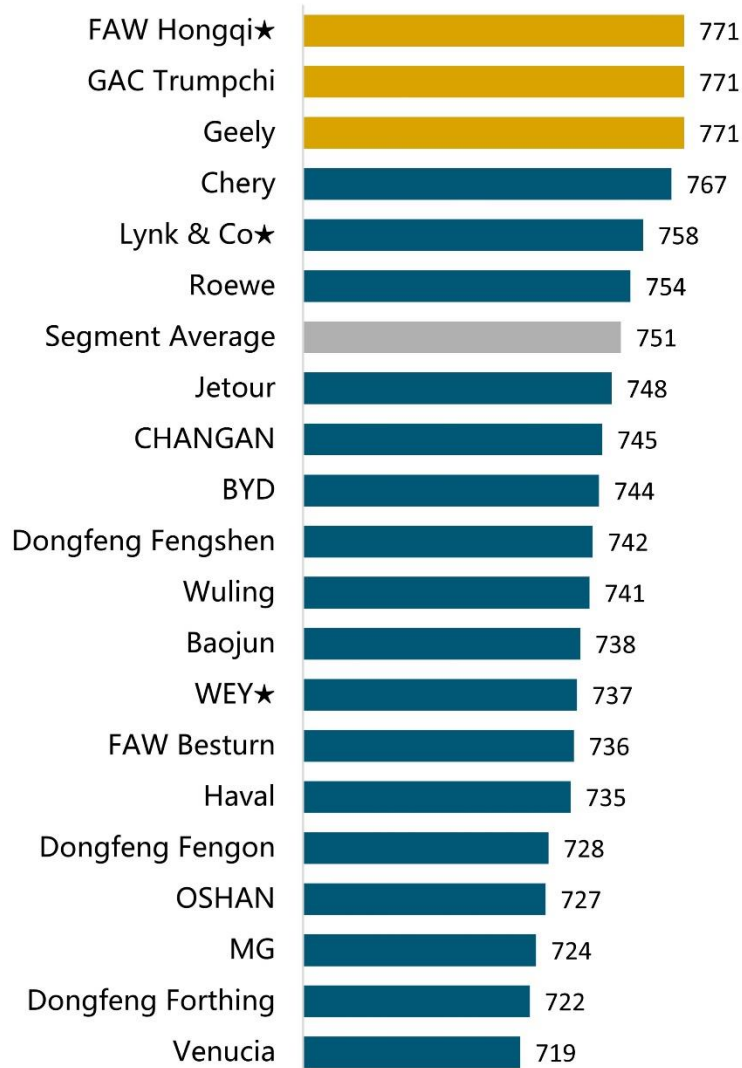
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## Chinese Domestic Brands

(Based on a 1,000-point scale)



★ Defined as Chinese 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.

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