

New ICE Vehicle Models Achieve Historically High APEAL Scores in China, J.D. Power FindsPorsche, FAW-Volkswagen and Chery Rank Highest in Respective Segment

SHANGHAI: 22 Aug. 2024 – Although overall automotive performance, execution and layout (APEAL) satisfaction is down one point from 2023 (on a 1,000-point scale) to 737 in 2024, the APEAL score of new internal combustion engine (ICE) vehicle owners has risen significantly to 741 points, up from 723 a year ago, marking the highest score since 2020, according to the J.D. Power 2024 China Automotive Performance, Execution and Layout (APEAL) Study,SM released today. Additionally, overall NEV-APEAL score for new energy vehicles (NEVs) is 789, an increase of 13 points from 2023. The rise in APEAL score of new models is mainly due to advancements in exterior, driving feel and driving comfort. The score for carry-over models is 737 points, down 2 points from 2023.

The study, now in its 22nd year, examines owners' assessments of their new-vehicle experience within the first two to six months of ownership, specifically what appeals most to them based on 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.

"Amid the rising penetration of new energy vehicles, internal combustion engine vehicles are facing unprecedented challenges," said **Elvis Yang, general manager of auto product practice at J.D. Power China**. "NEVs are reshaping the industry with their innovations in design and smart technology. To maintain their market position, ICE vehicle brands need to rethink their unique features and strengths. Gaining deeper insights into consumers' preferences and seeking breakthroughs in key areas such as exterior design, fuel efficiency, and smart cabin experience will help these brands differentiate from NEVs."

Following are key findings of the 2024 study:

- **Gap between premium and mass market brands has widened:** In 2024, the APEAL score for premium brands has increased to 771, up 14 points from 2023. In contrast, mass market international brands have declined to 736 this year from 738, and the score for Chinese domestic brands has dropped to 713 from 722.
- **Female owners have differing levels of infotainment satisfaction:** In 2024, among females the APEAL score for the infotainment system in ICE vehicles has dropped to 732, down 10 points from a year ago, primarily due to frustrations with the infotainment system. Conversely, among females' satisfaction with NEVs, the APEAL score reached 792, up 16 points year over year, largely driven by improvements in the infotainment system.
- **Vehicle owners placing more emphasis on fuel economy:** The importance of fuel economy has risen significantly, with its weight increasing to 17.2%, up from 15.4% in 2023. This is the largest increase and fuel economy is the highest weighted factor this year. The shift reflects growing owner concerns regarding vehicle costs and environmental effect, leading to higher expectations for fuel efficiency.
- **App installation rates steadily rising:** Installation rates for in-vehicle apps have increased across all brand categories. Premium brands have a 67% installation rate, up 7 percentage points from a year ago. Mass market international and Chinese domestic brands have installation rates of 53% and

48%, respectively, rising by 10 and 6 percentage points, respectively. However, remote control experiences through smartphones, smartwatches or other devices have not significantly improved. Satisfaction with premium brand apps has slightly increased (+0.2 points), while satisfaction with mass market international and Chinese domestic brands remains unchanged year over year.

Study Rankings

Porsche ranks highest in APEAL among premium brands with a score of 786. **BMW** (775) ranks second and **Audi** (774) ranks third.

FAW-Volkswagen is the highest-ranking mass market brand with a score of 755. **Buick** (750) ranks second and **Dongfeng Nissan** (745) ranks third.

Chery ranks highest among Chinese domestic brands with a score of 742. **Geely** (741) ranks second and **Roewe** (739) ranks third.

The segment-level APEAL awards by brand are for **Chery Tiggo 8**, **Chery Tiggo 8 Plus**, **GAC Trumpchi GS3 Yingsu**, **GAC Trumpchi GS8**, **Porsche Macan**, and **Porsche Panamera**.

Other models that rank highest in their respective segment are **Audi A4L**; **BMW 5 Series**; **Buick All New GL8**; **Cadillac XT4**; **Geely Emgrand**; **Honda Accord**; **Honda XR-V**; **Land Rover Range Rover**; **Mercedes-Benz E-Class**; **Nissan Sylphy Classic**; **Toyota Wildlander**; **Volkswagen Bora**; **Volkswagen Lamando L**; and **Volvo XC60**.

The 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 2024 study is based on responses from 32,728 owners of gas-powered vehicles who purchased their new vehicle between June 2023 and March 2024. The study includes 221 models from 48 different brands and was fielded from December 2023 through May 2024 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,SM 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.

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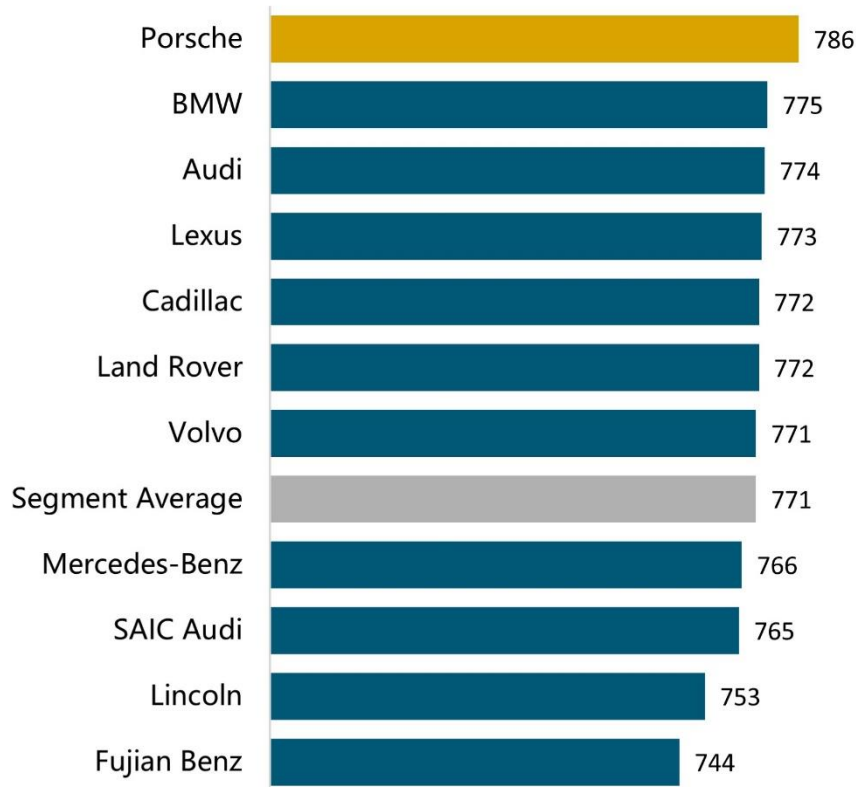
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NOTE: Seven charts follow.

J.D. Power 2024 China Automotive Performance, Execution and Layout (APEAL) StudySM

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



Source: J.D. Power 2024 China Automotive Performance, Execution and Layout (APEAL) StudySM

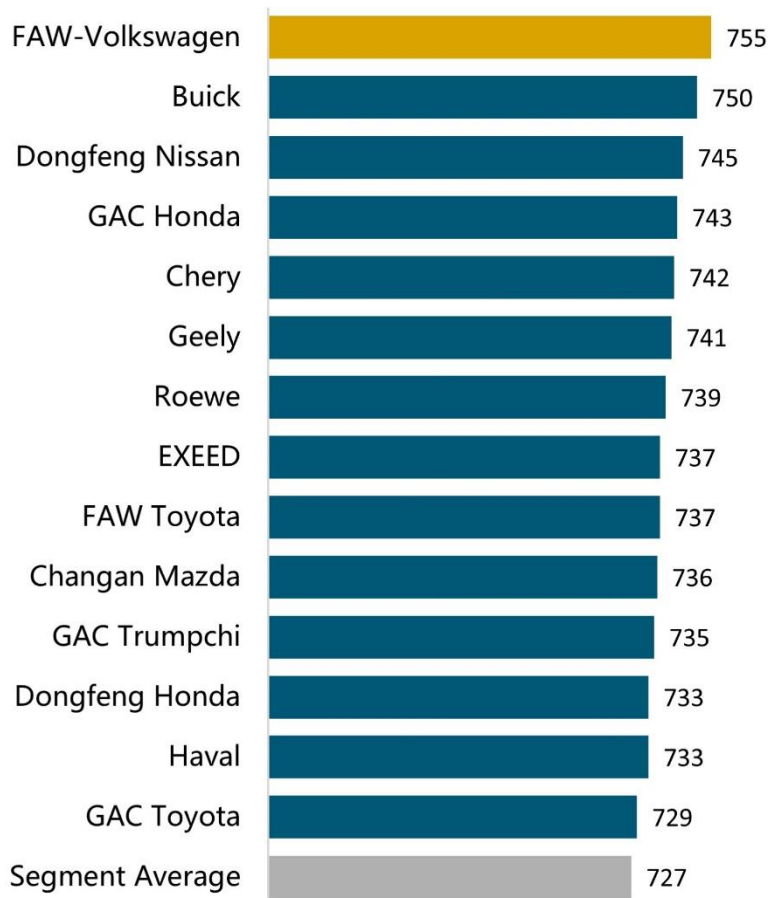
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APEAL Brand Index Ranking Mass Market Brands (1/2)

(Based on a 1,000-point scale)



Notes: In alphabetical order if there are tie scores.

Source: J.D. Power 2024 China Automotive Performance, Execution and Layout (APEAL) StudySM

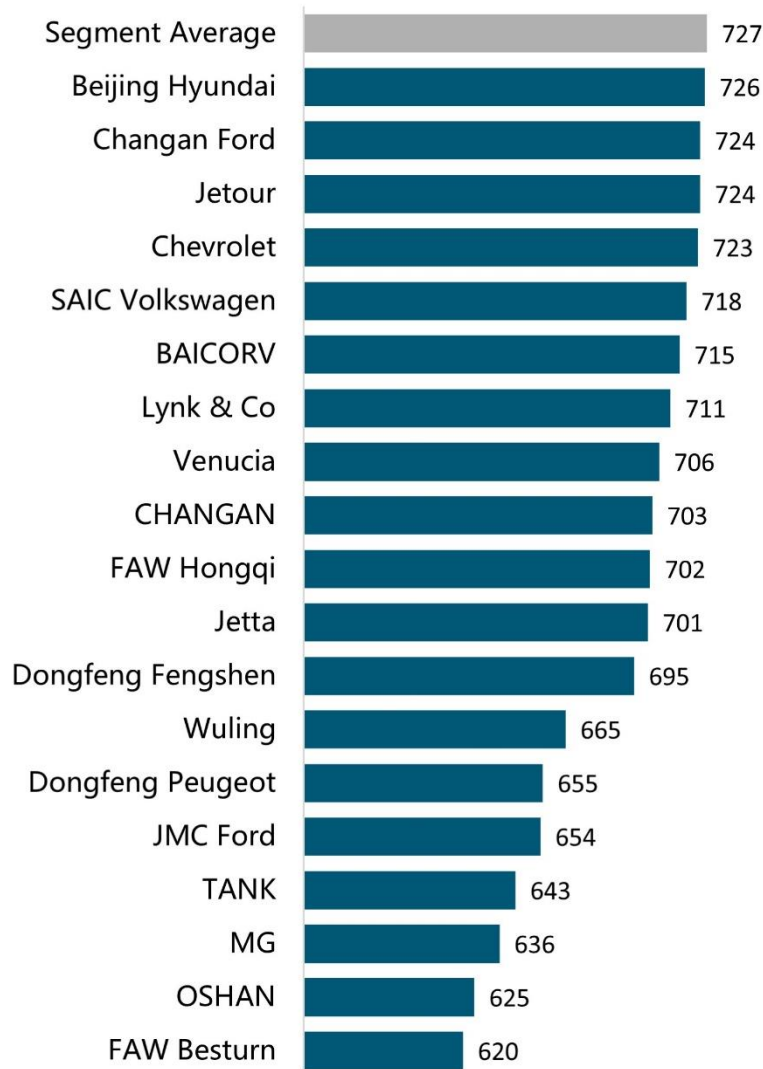
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APEAL Brand Index Ranking Mass Market Brands (2/2)

(Based on a 1,000-point scale)



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

Source: J.D. Power 2024 China Automotive Performance, Execution and Layout (APEAL) StudySM

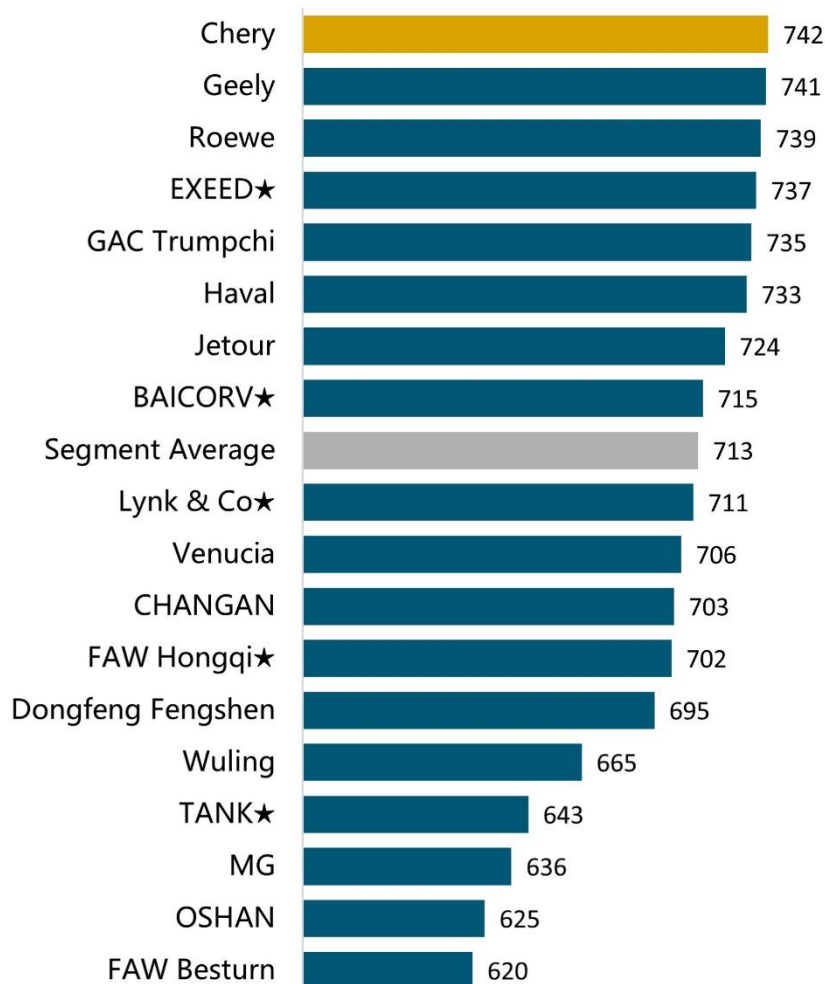
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APEAL Brand Index Ranking Domestic Brands

(Based on a 1,000-point scale)



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

★ 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 2024 China Automotive Performance, Execution and Layout (APEAL) StudySM

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Top Three Models per Segment Car Segment

*Compact Car

Highest Ranked: Geely Emgrand
Second Ranked: Roewe i5

Compact Premium Car

Highest Ranked: Audi A4L
Second Ranked: BMW 3 Series
Third Ranked: BMW 4 Series (tie)
Third Ranked: Lexus ES (tie)

Midsize Car

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

Midsize Premium Car*

Highest Ranked: BMW 5 Series (tie)
Highest Ranked: Mercedes-Benz E-Class (tie)

Compact Upper Car

Highest Ranked: Volkswagen Bora
Second Ranked: Toyota Levin
Third Ranked: Honda Fit (tie)
Third Ranked: Toyota Corolla (tie)

*Midsize Economy Car

Highest Ranked: Nissan Sylphy Classic

Midsize Upper Car

Highest Ranked: Honda Accord
Second Ranked: Honda Inspire
Third Ranked: Volkswagen Magotan

Large Premium Car

Highest Ranked: Porsche Panamera
Second Ranked: BMW 7 Series
Third Ranked: Mercedes-Benz S-Class

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

Source: J.D. Power 2024 China Automotive Performance, Execution and Layout (APEAL) StudySM

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Top Three Models per Segment SUV Segments

Compact SUV

Highest Ranked: GAC Trumpchi GS3 Yingsu
Second Ranked: Changan CS35 Plus
Third Ranked: Haval M6 Plus

Compact Upper SUV

Highest Ranked: Honda XR-V
Second Ranked: Changan CS75
Third Ranked: Lynk & Co 06

Compact Premium SUV

Highest Ranked: Cadillac XT4
Second Ranked: Mercedes-Benz GLA-Class
Third Ranked: Audi Q3

Midsized Economy SUV

Highest Ranked: Chery Tiggo 8
Second Ranked: Chery Tiggo 7 Plus
Third Ranked: Changan UNI-T

Midsized SUV

Highest Ranked: Chery Tiggo 8 Plus
Second Ranked: Mazda CX-5
Third Ranked: Jetour X70 Plus

Midsized Upper SUV

Highest Ranked: Toyota Wildlander
Second Ranked: Volkswagen Tiguan L
Second Ranked: Ford Escape

Midsized Premium SUV

Highest Ranked: Porsche Macan (tie)
Highest Ranked: Volvo XC60 (tie)
Third Ranked: Mercedes-Benz GLC-Class

Large SUV

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

Large Premium SUV

Highest Ranked: Land Rover Range Rover
Second Ranked: Land Rover Defender
Third Ranked: Porsche Cayenne

Source: J.D. Power 2024 China Automotive Performance, Execution and Layout (APEAL) StudySM

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Top Three Models per Segment MPV Segments

Large MPV

Highest Ranked: Buick All New GL8
Second Ranked: GAC Trumpchi M8
Third Ranked: Toyota Granvia

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

Note: To qualify for an award in the 2024 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 compact MPV, midsize MPV and premium MPV segments, these criteria were not met, thus no awards have been issued.

Source: J.D. Power 2024 China Automotive Performance, Execution and Layout (APEAL) StudySM

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