

Customer Satisfaction with New Energy Vehicle Sales and Services Increases, J.D. Power FindsNIO and Li Auto Rank Highest in Respective Segment

SHANGHAI: 7 Aug. 2025 – Overall customer satisfaction with vehicle purchase experience among new-energy vehicle (NEV) owners in China reaches 781 points (on a 1,000-point scale), up 8 points from 2024,^① according to the inaugural J.D. Power China New Energy Vehicle Sales Satisfaction Index (NEV-SSI) Study,SM released today. Specifically, satisfaction has improved in some categories including purchase plan (+16), customer follow-up (+10) and delivery (+9). Additionally, mass market brands show strong growth, narrowing the gap with premium brands. Domestic brands are excelling in sales, revenue and customer satisfaction, rapidly improving their market position and customer reputation. Among the seven key categories, domestic brands lead scores for reception, showroom visit and customer follow-up.

The study evaluates the purchase experience of NEV owners between two and 12 months of ownership. Index scores are based on measurements across seven categories: information collection; reception; showroom visit; test drive; customer follow-up; purchase plan; and delivery. The study also includes trending topics in the NEV industry, such as intelligent experience, purchase benefits and delivery experience, which assist the NEV manufacturers in more clearly understanding the focus of NEV customers on purchase experience and key points that may promote sales conversion.

The study finds that in 2025, purchasing a vehicle is no longer just a comparison of product features, but rather a dynamic journey consisting of information collection (scenario-based experience) and trust building (decision-making). In this context, the sales service model has shifted from display of functions to establishing emotional resonance with customers. When sales staff present product features using real-life scenarios, it significantly enhances customers' emotional resonance and boosts their purchasing intentions. The study shows that intent to buy among customers who received a scenario-based introduction increases by 18.6%. Meanwhile, customized test drives have become a crucial step in building technical trust and igniting customer word-of-mouth recommendations. Even more critical is the pace of service, especially the follow-up after the customer leaves the dealership: customer satisfaction is higher when sales staff follow up on the same day and results in higher conversion rates.

"The fundamental transformation of automotive sales services in 2025 has basically come down to adapting to how customers think and what steps they take when buying a vehicle," said **Ann Xie, general manager of the digital retail consulting practice at J.D. Power China**. "Sales staff need to accurately identify customers' needs, convey brand value and close deals after building trust with them. OEMs need to establish an efficient information guidance system online, eliminate user doubts by accurately pre-embedding key information and use intelligent data analysis tools to transmit customer needs to sales terminals in real time. Offline, it is necessary to break the traditional fixed processes and create three experience climaxes through flexible scenario design and scenario-based test drives, customized experiences and creating opportunities for word-of-mouth recommendations. In this process, OEMs need to build a full-process collaboration mechanism: the sales team seamlessly connects customer leads through online-offline integration; owner communities provide real-time service feedback; each service link is promoted to upgrade the relationship between the brand and owners to achieve a positive cycle of customer relationships. By seizing every customer touchpoint, sales services can be upgraded from a simple transaction to the starting point of a long-term relationship between the brand and owners."

^① Source: J.D. Power 2024 China New Energy Vehicle Customer Experience Value Index (NEV-CXVI) StudySM

Following are some key findings of the 2025 study:

- **Scenario-based experience drives faster decision-making, test drive boosts conversion:** The study shows that during the NEV sales process, customers increasingly rely on scenario-based product experiences to make purchase decisions. Upgrading vehicles from transportation tools to lifestyle solutions effectively shortens the decision-making chain. When sales staff use specific life scenarios, such as camping or family outings to present vehicle features and advantages, it significantly increases customers' willingness to purchase. Among these scenarios, entertainment and camping are the most attractive. At the same time, there is a significant increase in demand for customized test drive experiences. The study shows that customer demand for customized test drive routes has increased by 9.8%.^② The more thorough the test drive experience, the better the customer experience and the higher the product NPS^{®③} score. Therefore, OEMs need to reframe the test drive segment from a functional demonstration to a final step in building technical trust, which can effectively aid in closing the sale.
- **Seamless service across the entire journey enhances conversion efficiency:** The study shows that sales staff can significantly increase conversion rates and improve product reputation by accurately grasping customer needs online and quickly understanding their purchase intentions when they visit the dealership. When this happens, customer satisfaction improves by 50 points; the percentage of customers who complete the deal within one week rises by 13.2%; and product NPS^{®④} increases by 21.1 points. When sales staff use the information left by customers during online communications to accurately address their concerns offline, the conversion efficiency improves and promotes more word-of-mouth recommendations.
- **Timely follow-up by sales staff can lead to closed deals:** Timely follow-up helps deepen customer trust, advance the purchase process and lay the foundation for long-term customer relationships. The study shows that when sales staff follow up with customers on the same day they leave the dealership, customer satisfaction and conversion rates are higher. Customer satisfaction is 12 points higher when sales staff follow up on the same day and conversion rates are 25.6% higher than when sales staff follow up the next day.
- **Customer word-of-mouth becomes the core driving force for service transformation:** In 2025, word-of-mouth recommendations not only directly drive sales conversions but also becomes a key factor in customer retention. The study shows that the percentage of NEV customers who choose a brand because of its brand reputation has increased by 12.5% compared to 2024^⑤. Among these, professional service during the test drive has become the pivotal point that results in more likely sharing word-of-mouth recommendations with friends.

Study Rankings

NIO ranks highest among premium brands with a score of 806. **Mercedes-Benz** (788) ranks second.

Li Auto ranks highest among mass market brands with a score of 804. **Xpeng** (800) ranks second. **AVATR** and **ZEEKR** rank third in a tie, each with a score of 799.

^② Source: J.D. Power 2024 China New Energy Vehicle Customer Experience Value Index (NEV-CXVI) StudySM

^③ Net Promoter[®], Net Promoter System[®], Net Promoter Score[®], NPS[®], and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.

^④ Ibid.

^⑤ Source: J.D. Power 2024 China New Energy Vehicle Customer Experience Value Index (NEV-CXVI) StudySM

NIO ranks highest among Chinese domestic brands with a score of 806. **Li Auto** (804) ranks second. **Xpeng** (800) ranks third.

The China New Energy Vehicle Sales Satisfaction Index (NEV-SSI) Study measures the purchase stage across seven categories (in order of importance): customer follow-up (22%); information collection (16%); delivery (15%); showroom visit (13%); purchase plan (12%); reception (12%); and test drive (11%).^⑥

The 2025 study is based on responses from 11,060 vehicle owners in 81 major cities who purchased their vehicle between March 2024 and April 2025. The study was fielded from March through June 2025. and includes 61 brands; among them, 47 brands achieved sufficient samples.

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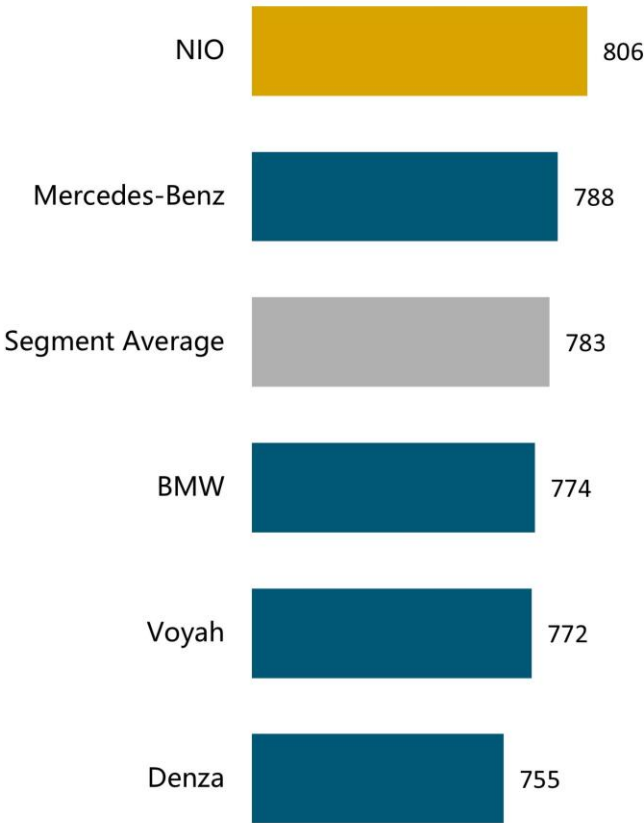
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NOTE: Three charts follow.

^⑥ The weights are presented in rounded form, and the actual calculation is based on decimal places.

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



Notes: Small sample size (n=30~99) is not displayed for ranking.

Source: J.D. Power China New Energy Vehicle Sales Satisfaction Index (NEV-SSI) StudySM

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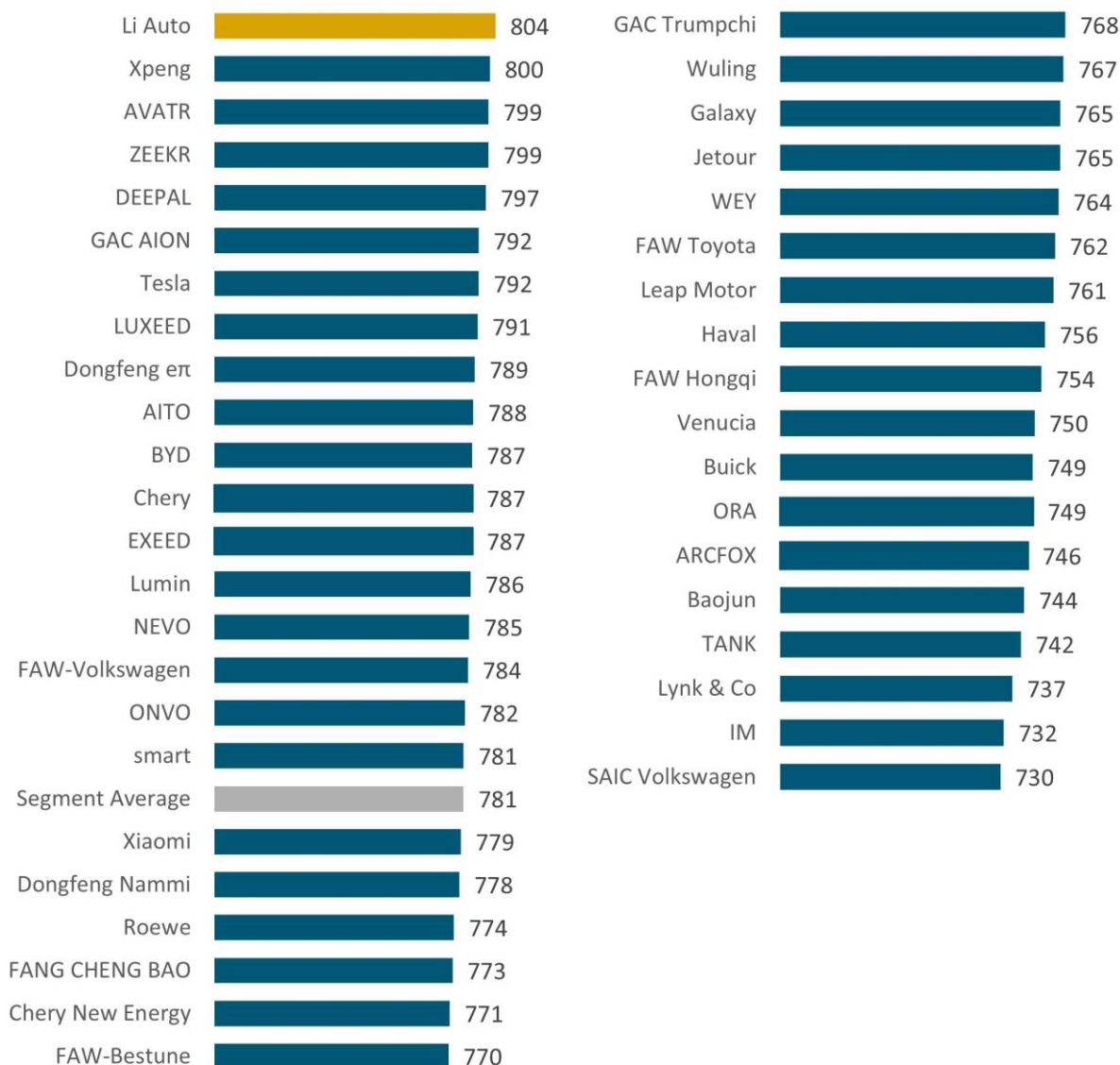
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Mass Market Brands

(Based on a 1,000-point scale)



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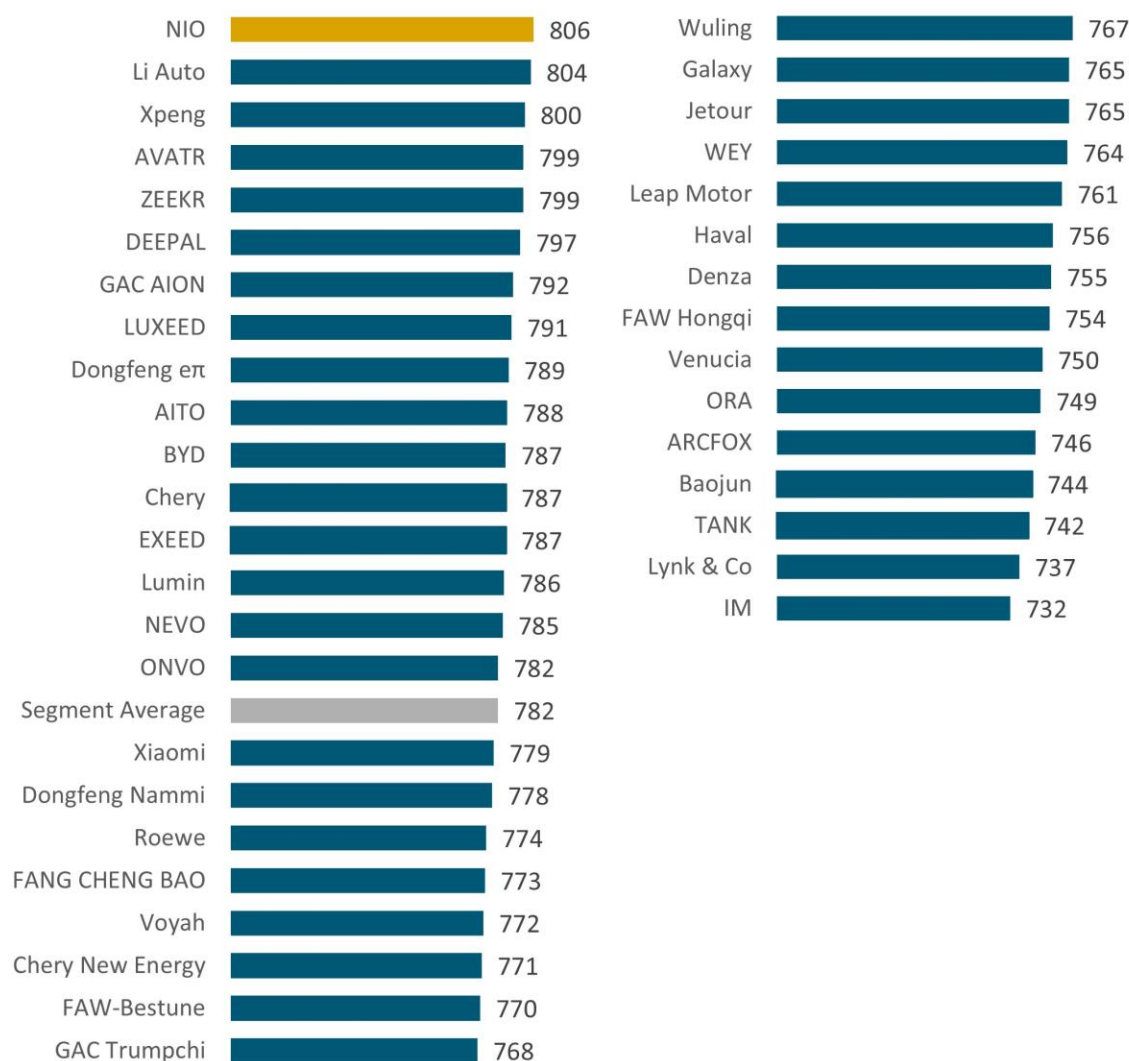
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Chinese Domestic Brands

(Based on a 1,000-point scale)



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