Purchase Experience Overtakes Brand in Vehicle Purchase Decisions, J.D. Power Finds

NIO, Li Auto, Land Rover, Dongfeng Honda and Chery Each Rank Highest in Their Respective Segment

SHANGHAI: 18 Jun, 2026 – As the automotive market in China nears saturation and price competition continues to increase, the purchase experience has replaced brand loyalty as the primary differentiator among consumers. According to the J.D. Power 2026 China Purchase Experience Index (PXI) Study℠, new energy vehicles (NEVs) lead internal combustion engine (ICE) vehicles by 13 points, with advantages in showroom experience, test drives and customer follow-up. Strengths for ICE vehicles include the in-store experience. The study, formerly the J.D. Power China Sales Satisfaction Index (SSI) Study℠, shifts the lens from sales satisfaction to focus on the customer purchase experience and emotional aspects of the process to provide the industry with a new tool to measure new-vehicle owners' purchase experience between two and six months of ownership.

Findings show that premium NEV brands lead with a score of 811 (on a 1,000-point scale), surpassing premium ICE brands at 788 points and mass market NEV brands at 796 points. This shift indicates that electrification has effectively breached the lead formerly held by traditional premium ICE brands. Domestic brands are diverging internally: domestic start-up brands lead with a score of 810 in the areas of in-store experience, showroom experience and test drive and delivery, followed by domestic brands (801), traditional domestic brands (786) and international brands (784).

"In the past four years, the purchase experience of Chinese customers has improved by 25 points cumulatively, the basic services standards were extensively met. But his year we've found that the game of experience has changed," said **Ann Xie, Managing Director of Automotive Service Solutions Division at J.D. Power China**. "NEVs surpassed ICE vehicles by 13 points, the gap of execution still exists between NEVs and ICE vehicles, which means the ICEs are still competitive in 'in-store experience', but they fall far behind in 'customer follow-up' and 'purchase plan discussion'. Post-00s is the fastest growing customer, but their satisfaction level is lower than the post-90s, not being pickier, but with higher expectations, and extreme reward-punishment response. The new definition of premium has also shifted from 'brand-driven premium' to 'experience-driven premium' —transparency, professionalism and fluency, consistency are the new benchmarks that define premium for the customers. "

The essence of all changes mentioned above: customers have stopped to pay for the brand, it's the experience they feel that they pay for. The future winning hand is no longer about higher specifications, but the feelings of worthy the customers feel at every touch point. And this is precisely the mission of PXI study, to provide the industry with a new tool to measure the experience, to help brands find their true growth leverage in the era of saturated market.

Following are key findings of the 2026 study:

- **Service replaces brand among NEV shoppers:** Among NEV customers, service as a purchase reason has risen to 64.1%, while brand and product quality have declined by 6.7% and 9.1%, respectively. Conversely, ICE vehicle customers still rely heavily on brand history and quality reputation.

- **Responses of NEV owners vs. ICE owners dramatically different:** When using Net Promoter Score® (NPS) to measure customer perceptions (on a 100-point scale), brand reputation among NEV owners is two to three times higher than among ICE owners. For example, negative test drives

cause the NPS®[1] among NEV owners to drop to -76 points, compared to -25 points for ICE vehicles. When technology features are not demonstrated during the product experience, the NPS among NEV customers drops to -24 points, compared to 8 points among ICE customers. Lastly, if the delivery ceremony fails to meet expectations, NPS scores among NEV customers drop to -13 points, compared to 5 points among ICE vehicle customers.

- **Strategic pacing versus transactional speed:** ICE customers prioritize transaction speed, while NEV customers value experiential precision. A store visit exceeding 10 minutes results in a 52.8-point decline in NPS among NEV customers, compared with a 33.8-point decline among ICE customers.

- **The "Box" SUV paradox:** While "box-shaped" SUVs drive viral growth, their success is product-led rather than service-led. NPS scores for experience for these models drop by 129 points if product presentations are plain or scripted, a much steeper decline than the 72-point drop for non-"box-shaped" models.

Study Rankings

NIO ranks highest among premium NEV segment brands with a score of 827. **AITO** (814) ranks second.

Li Auto ranks highest among mass market NEV segment brands with a score of 816. **Deepal** and **Xpeng** rank second in a tie, each with a score of 814.

NIO also ranks highest among domestic NEV segment brands (827), followed by **Li Auto** (816), which ranks second. **AITO**, **Deepal** and **XPeng** rank third in a tie, each with a score of 814.

The 2026 China Purchase Experience Index (PXI) Study measures new-vehicle owners' purchase experience between two and six months of ownership. The study examines seven factors (importance weights are included): information gathering (15.2%); arrival & in-store experience (13.4%); showroom experience (12.2%); test drive (12.1%); follow-up (15.9%); purchase plan & discussion (15.1%); and delivery (16.1%).

The 2026 study is based on responses from 9,093 owners in 81 major cities who purchased their vehicle between June 2025 and January 2026. The study was fielded from December 2025 through March 2026 and includes 47 NEV brands and 36 ICE brands, 25 of which achieved sufficient samples.

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Media Relations Contacts
Scarlette Wang, J.D. Power; China; +86 21 8026 5719; sijia.wang@jdpa.com
Joe LaMuraglia, J.D. Power; U.S.; 714-621-6224; media.relations@jdpa.com

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NOTE: Six charts follow.

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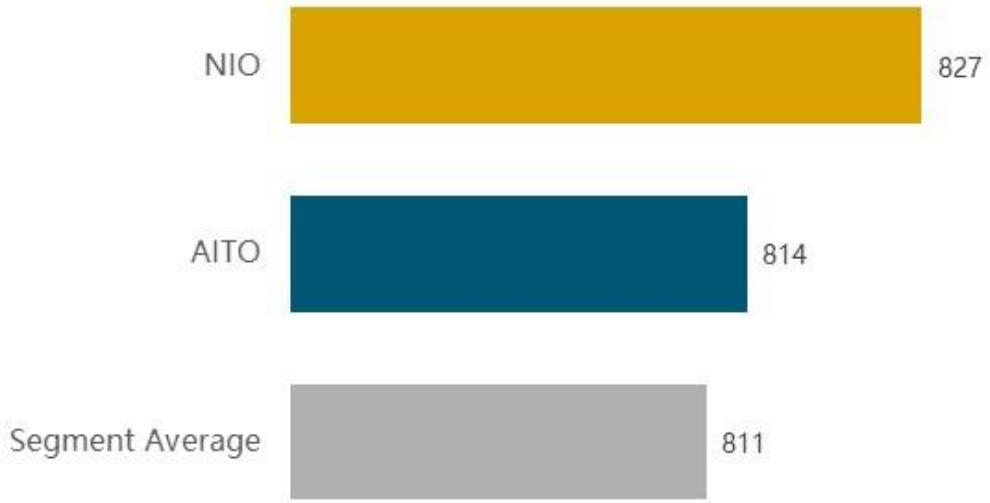
[1] *Net Promoter,® Net Promoter System,® Net Promoter Score,® NPS,® and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.*

J.D. Power
2026 China Purchase Experience Index Study℠ (PXI)

Premium NEVs

(Based on a 1,000-point scale)



Note: In alphabetical order if there are tie scores.

Source: J.D. Power 2026 China Purchase Experience Index Study ℠ (PXI)

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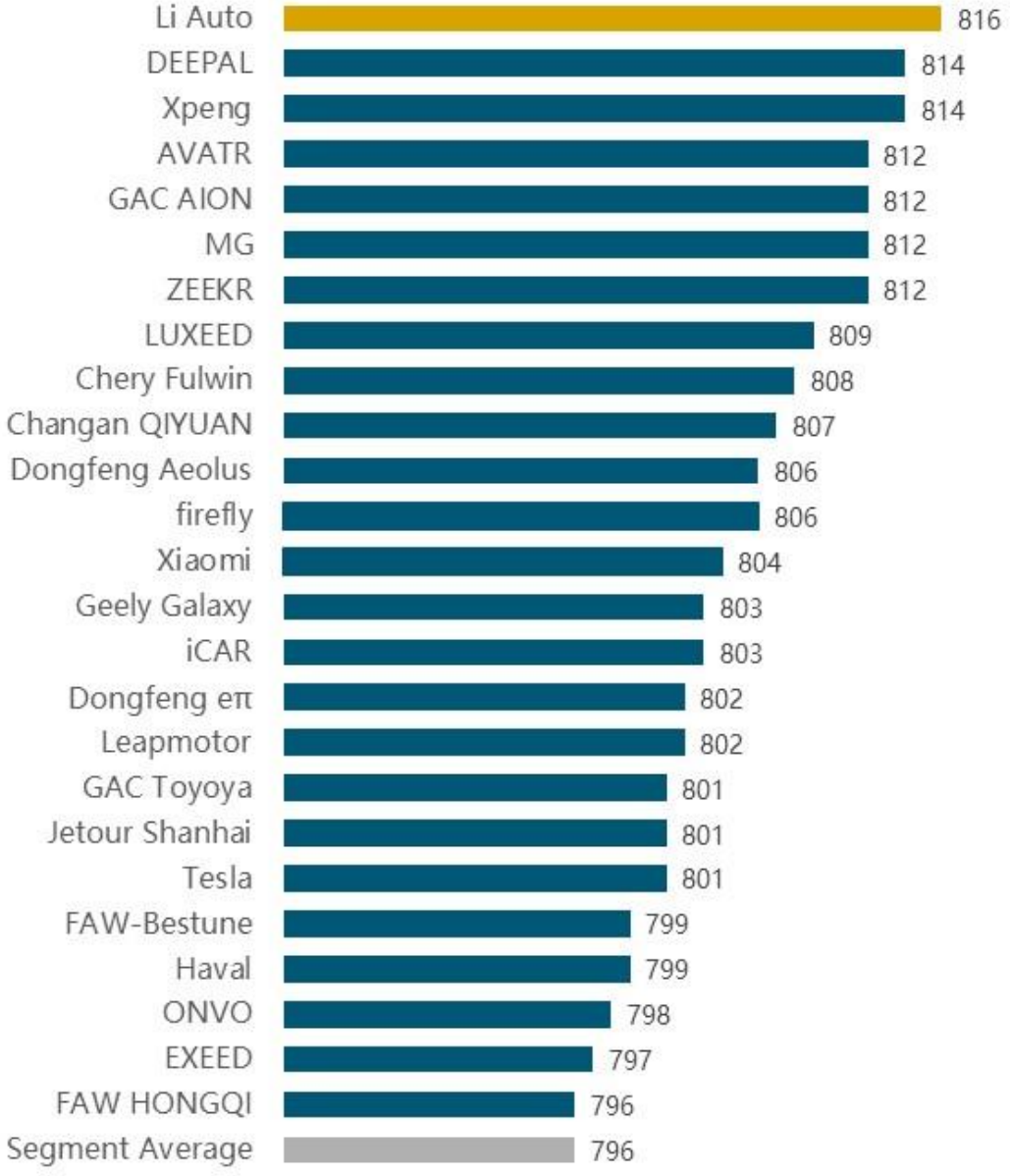
Mass Market NEVs

(Based on a 1,000-point scale)



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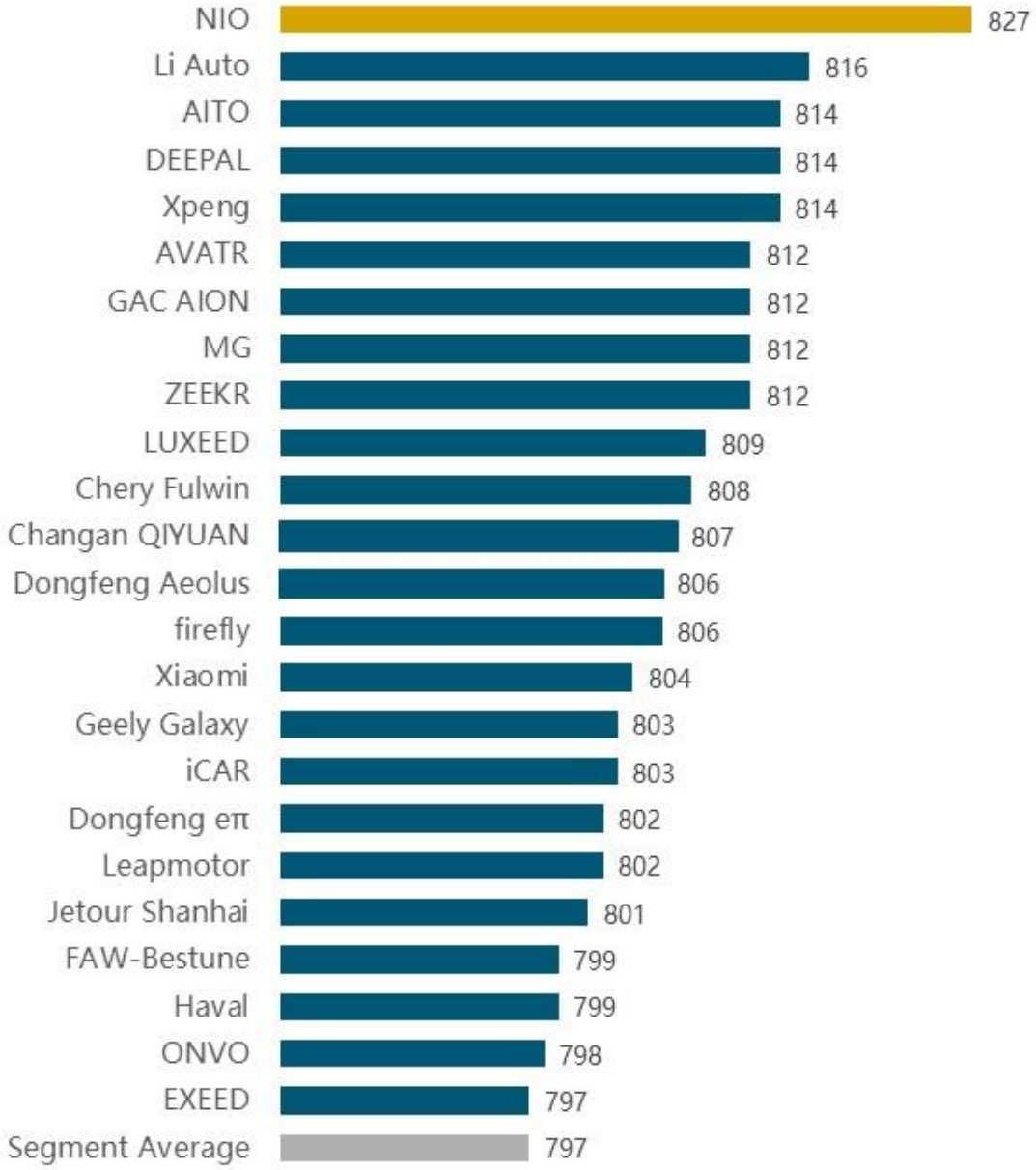
Domestic NEVs

(Based on a 1,000-point scale)



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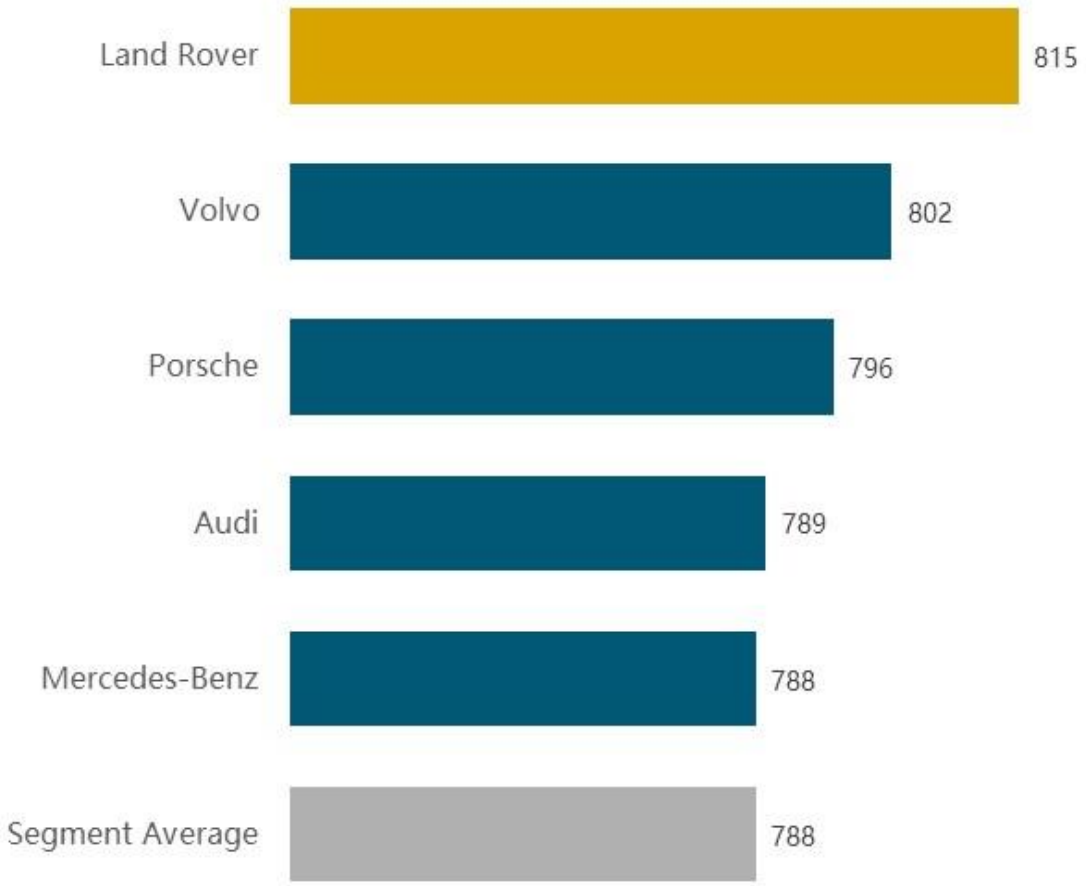
Premium ICEs

(Based on a 1,000-point scale)



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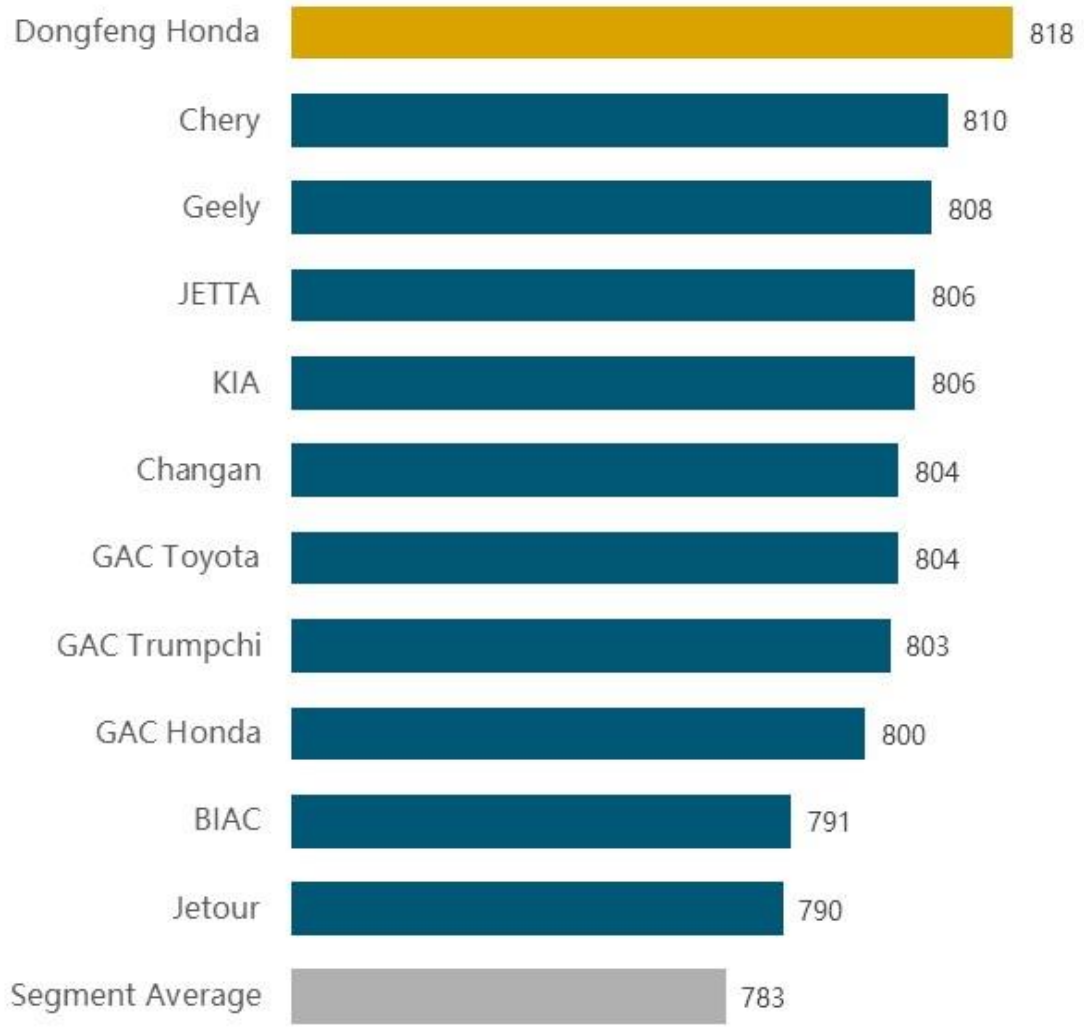
Mass Market ICEs

(Based on a 1,000-point scale)



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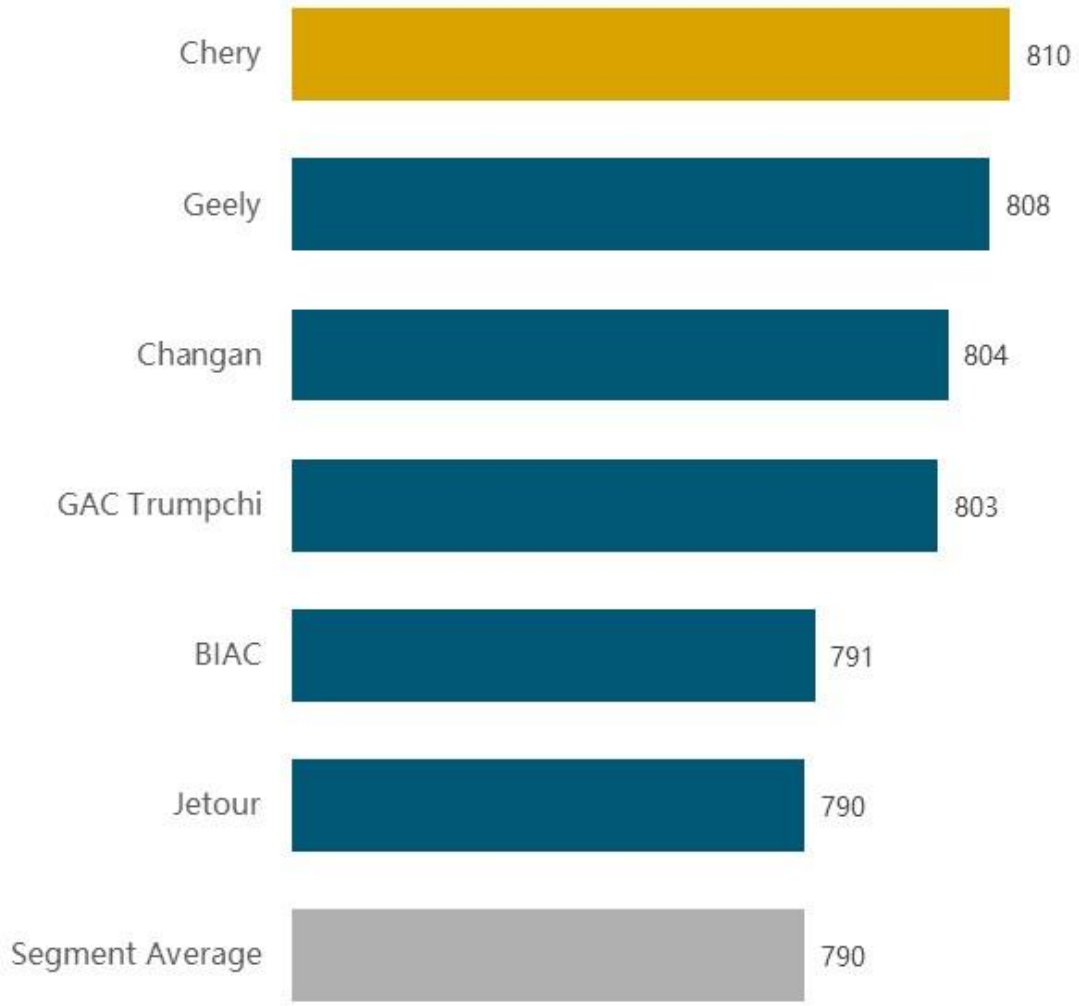
Domestic ICEs

(Based on a 1,000-point scale)



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