

Vehicle Service Is the Only Dimension of Vehicle Brand Reputation Declining across Both ICE and NEV Markets, J.D. Power Finds

Porsche, Geely, AITO, NIO and Xiaomi Rank Highest in Respective Segments

SHANGHAI: 29 Sept. 2026 – The J.D. Power 2026 China Brand Reputation Index NPS^{SM①} released today reveals a critical shift: customer experience is moving from product to service. Premium internal combustion engine (ICE) brands score 48.8 on the NPS scale (100 points), with mass market ICE at 42.9; premium new-energy vehicle (NEV) brands average 45.7; and mass market NEV at 42.4. However, service tells a different story. NEV service NPS has plummeted 14.9 points from 2025, with detractors (respondents who would discourage others from buying) now at 15.0%—one in seven NEV owners actively discourages purchases. Meanwhile, the ICE-NEV service gap has widened from 3.9 to 8.2 points. Despite mature product strength, after-sales infrastructure hasn't kept pace with NEV growth, preventing product advantages from converting into customer recommendations.

As the industry's product dividend plateaus, competition is shifting from hardware to service capabilities across the full purchase and ownership journey. The study covers 59 brands across ICE and NEV segments, with responses for the 2026 study from 69,162 ICE and NEV owners. Only five brands demonstrate strong performance across the product, sales and service dimensions, while 92% show deficiencies in at least one area.

The China Brand Reputation Index NPS differs from traditional NPS models by evaluating brand performance across three dimensions: product NPS, sales NPS and service NPS. These are combined using a weighted average to form a comprehensive reputation score that shows not only where a brand stands in the market, but why—and how to improve.^②

"NPS is never just a report card for satisfaction; it is a leading indicator of future market share," said Ann Xie, **Managing Director of Automotive Service Solutions Division at J.D. Power China**. "China's auto market is entering an era in which reputation and sales performance must align. NEV brands have already built a positive loop in which reputation drives share, while many ICE brands still rely on high share built on low reputation. As technology specifications lose their mystique and powertrains and smart cockpits become table stakes, the industry must guard against the 'product-only' trap: customers increasingly value transparency, professionalism and delivered promises. At the end of technology lies product, and at the end of product lies people."

Following are some key findings of the 2026 study:

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.

② The weights of product, sales and service NPS are calculated based on the importance customers assign to "product" and "service experience" in their purchase decisions. The China Brand Reputation Index NPS calculates the NPS for ICE brands based on the weighted NPS results from the following five syndicated studies: J.D. Power China Initial Quality Study™ (IQS); J.D. Power China Automotive Performance, Execution and Layout (APEAL) Study™; J.D. Power China Tech Experience Index (TXI) Study™; J.D. Power China Purchase Experience Index (PXI) Study™; and J.D. Power China Customer Service Index (CSI) Study™. For NEV brands, the China Brand Reputation Index NPS is derived from the weighted NPS scores of the J.D. Power China New Energy Vehicle Initial Quality Study™ (NEV-IQS); J.D. Power China New Energy Vehicle Automotive Performance, Execution and Layout (NEV-APEAL) Study™; J.D. Power China Tech Experience Index (TXI) Study™; J.D. Power China Purchase Experience Index (PXI) Study™; and J.D. Power China New Energy Vehicle Customer Service Index (NEV-CSI) Study™. The weights for product, sales and service NPS are 63%, 18.5% and 18.5%, respectively.

- **ICE–NEV reputation gap narrows sharply:** Overall ICE NPS has fallen from 47.5 in 2025 to 44.3 in 2026. Overall NEV NPS has risen from 40.4 to 42.7, compressing the gap between the two from 7.1 to 1.6 points—a 78% reduction. The driver is product dimension: NEV product NPS surged 9.5 points to 49.2, nearly at parity with 49.8 for ICE brands, compared with a 9.1-point ICE–NEV product gap in 2025. As products converge, sales and service experience are becoming the deciding factors for brands: products determine whether customers choose a brand; sales determine whether they buy; and service, whether they recommend it.
- **Reputation increasingly drives market share:** The NEV market has established a positive commercial loop in which reputation converts into share—the NEV reputation conversion rate reaches 62.5% this year. The ICE market, by contrast, remains stuck in a mismatch: 26.1% of low-reputation brands account for 45.5% of sales, with growth sustained largely by price discounting and legacy inertia. As the market matures and competition shifts from price to experience, market share built without a reputation foundation faces a serious risk of erosion.
- **Customer expectations are being reset:** NEV products are undergoing a tech demystification: basic expectation indicators have jumped from 31% to 62% of product touchpoints, while delight indicators have fallen from 52% to 24%—smart cockpits and driver assistance are now table stakes. ICE service, by contrast, is completing a return to value: delight indicators in service have surged from 10% to 62%, while basic expectation indicators have dropped from 90% to 38%. With smart hardware breakthroughs increasingly scarce, sincere, transparent and professional service has become the strongest driver of recommendations.

Study Rankings

Porsche ranks highest among ICE premium brands with a score of 57.3. **Land Rover** (56.1) ranks second and **Cadillac** (50.6) ranks third.

Geely ranks highest among ICE mass market brands with a score of 46.6. **Chery** (46.2) ranks second and **CHANGAN** (45.2) ranks third.

AITO and **NIO** rank highest among NEV premium brands in a tie, each with a score of 48.7.

Xiaomi ranks highest among NEV mass market brands with a score of 51.5. **DEEPAL** (48.3) ranks second and **ZEEKR** (48.1) ranks third.

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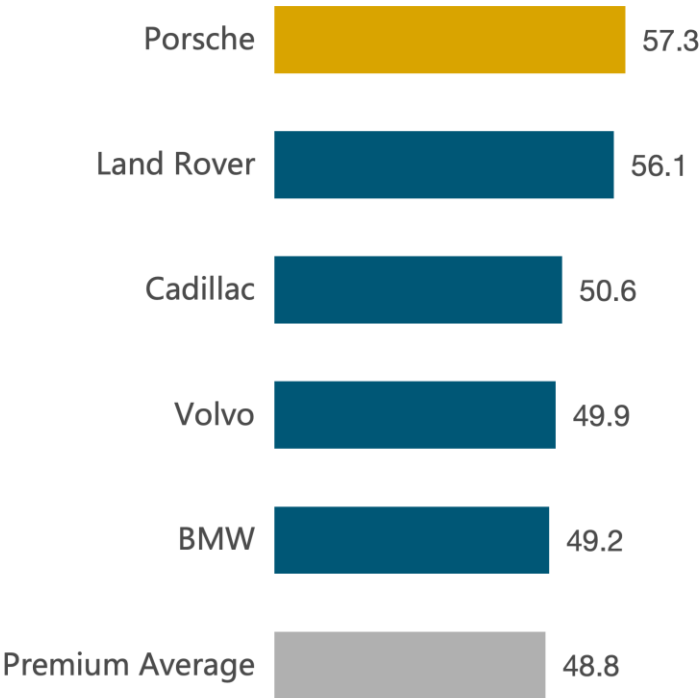
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NOTE: Four charts follow.

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2026 China Brand Reputation Index NPSSM

ICE Premium Brands (on a -100 to 100-point scale)

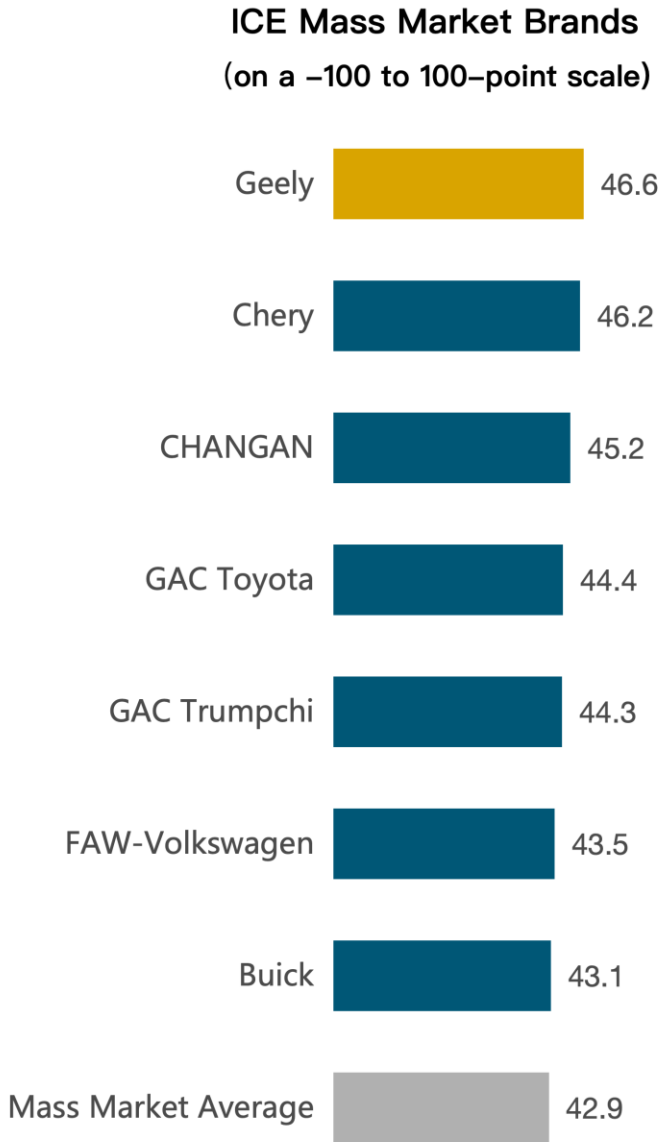


Source: J.D. Power 2026 China Brand Reputation Index NPSSM

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2026 China Brand Reputation Index NPSSM



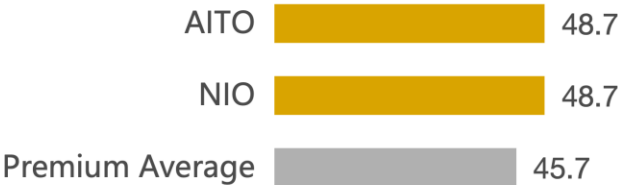
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2026 China Brand Reputation Index NPSSM

NEV Premium Brands (on a -100 to 100-point scale)



Notes: The study only releases the performance results of brands above the average line. Small sample size (n=30~99) is not displayed for ranking. Brands with identical scores are sorted alphabetically.

Source: J.D. Power 2026 China Brand Reputation Index NPSSM

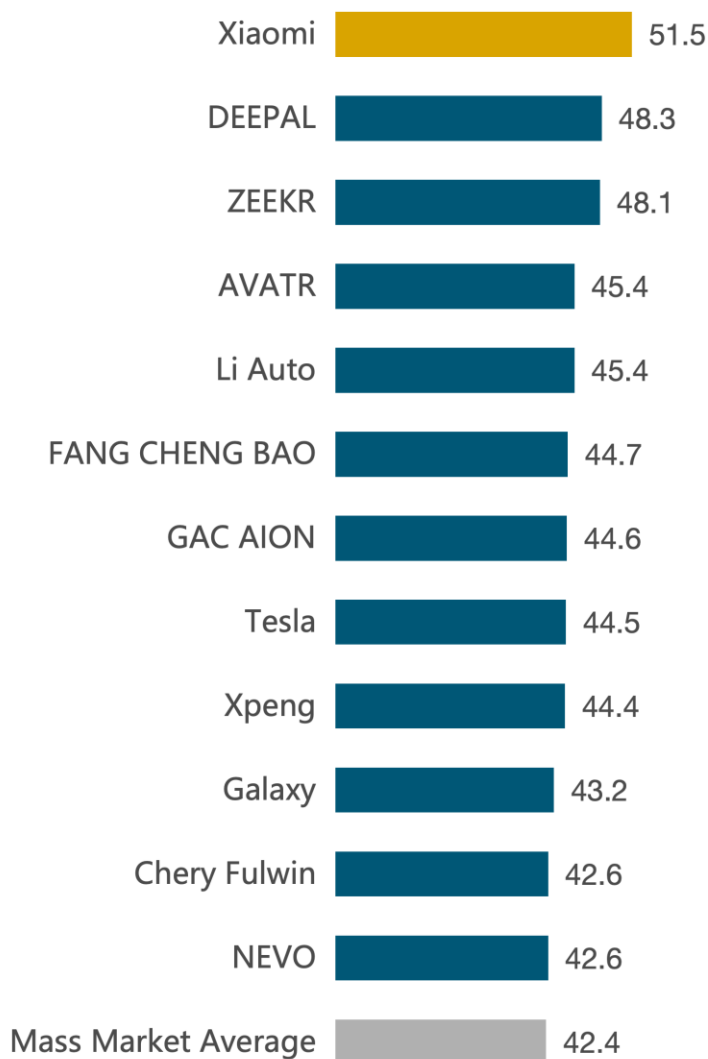
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2026 China Brand Reputation Index NPSSM

NEV Mass Market Brands

(on a -100 to 100-point scale)



Brands with identical scores are sorted alphabetically.

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