

Chinese Brands Still Need to Catch Up in ACEN Performance, J.D. Power finds

Porsche Ranks Highest among Luxury Brands; Jeep Ranks Highest among Mass Market Brands

SHANGHAI: 31 Oct. 2018 – The gap between Chinese domestic auto brands and international brands in new-vehicle performance and design has narrowed for the third consecutive year, with ACEN continuing to contribute the most to the gap, according to the J.D. Power 2018 China Automotive Performance, Execution and Layout (APEAL) Study,SM released today.

Since 2016, domestic brands have made stable progress in the Audio/ Communication/ Entertainment/ Navigation (ACEN) category, with the performance gap between domestic brands and international mass market brands narrowing 6 points (on a 1,000-point scale). Audio system and basic navigation features have both improved significantly; however, their performance still lags more than the other categories, contributing the most to the total APEAL index (21.9%) this year. This demonstrates the importance of the ACEN category in driving overall APEAL satisfaction in the automotive market in China.

“It’s getting harder to satisfy consumers in China with sensory features as they are increasingly sensitive to ‘soft quality’ issues, which means that improving ACEN features that have broad capabilities will likely bring a huge opportunity for manufacturers in an increasingly competitive market,” said **Edward Wang, Research Director at J.D. Power China**. “Both conventional automakers and new-energy vehicle manufacturers need to put more effort into improving the ACEN category to gain a competitive edge in a slowing environment.”

Following are additional findings of the study:

- **The overall 2018 APEAL index increases:** Driven by the improvements in nearly all categories, the overall 2018 industry APEAL index score stands at 704, which is an increase of 7 points from 2017, turning around the declining trend during the two consecutive years since 2016.
- **All categories improve except fuel economy:** The fuel economy category is the only one with a 4-point decrease. The highest-performing category, vehicle exterior, improves by 7 points year over year. Seats, storage and space and driving dynamics are the three categories with the biggest improvements from last year.
- **All brand origins make progress:** European brands (717) rank highest, posting the greatest improvement (8 points), followed by Korean brands (715). Japanese brands score 714; U.S. brands score 705; and domestic brands score 683, increasing by 7 points from 2017.

Study Rankings

Porsche ranks highest in APEAL among luxury brands, with a score of 800. **Land Rover** (746) ranks second and **BMW** (742) ranks third. **Jeep** (721) ranks highest among mass market brands, followed by **Dongfeng Nissan** (719) and **FAW-Mazda** (717).

Other models that rank highest in their respective segments are the **Hyundai Reina; Honda Fit; Honda City Fengfan; Nissan Sylphy Classic; Kia K4 Cachet; Volkswagen Passat; Audi A4L; Cadillac XTS; Haval H2; Citroen C3-XR; Honda CR-V; GAC Trumpchi GS8; BMW X1; Porsche Macan; Porsche Cayenne; Changan Oushang A800; Volkswagen Touran L; and Buick New GL8.**

The 2018 China Automotive Performance, Execution and Layout (APEAL) Study measures owners' emotional attachment to and level of excitement with their vehicle across 77 attributes in 10 vehicle performance categories: vehicle exterior; vehicle interior; storage and space; audio/communication/entertainment/navigation; seats; heating, ventilation and air conditioning; driving dynamics; engine/transmission; visibility and driving safety; and fuel economy. These attributes are combined into an overall APEAL index score that is measured on a 1,000-point scale.

The study, now in its 16th year, is based on evaluations from 33,404 owners of new vehicles within the first two to six months of ownership. The study analyzes models in 21 vehicle segments and includes 285 different passenger-vehicle models from 77 different brands. The field work was conducted from December 2017 through July 2018 in 71 major cities across China.

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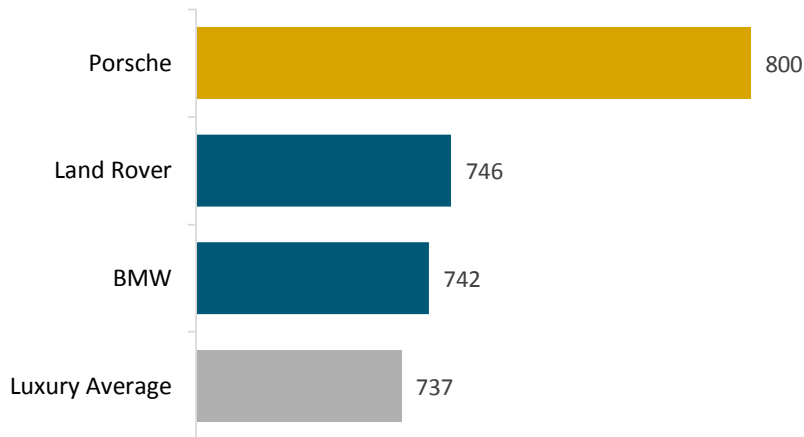
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Note: Four charts follow.

J.D. Power 2018 China Automotive Performance, Execution and Layout (APEAL) StudySM

2018 APEAL Nameplate Index Ranking—Luxury

(Based on a 1,000-point scale)



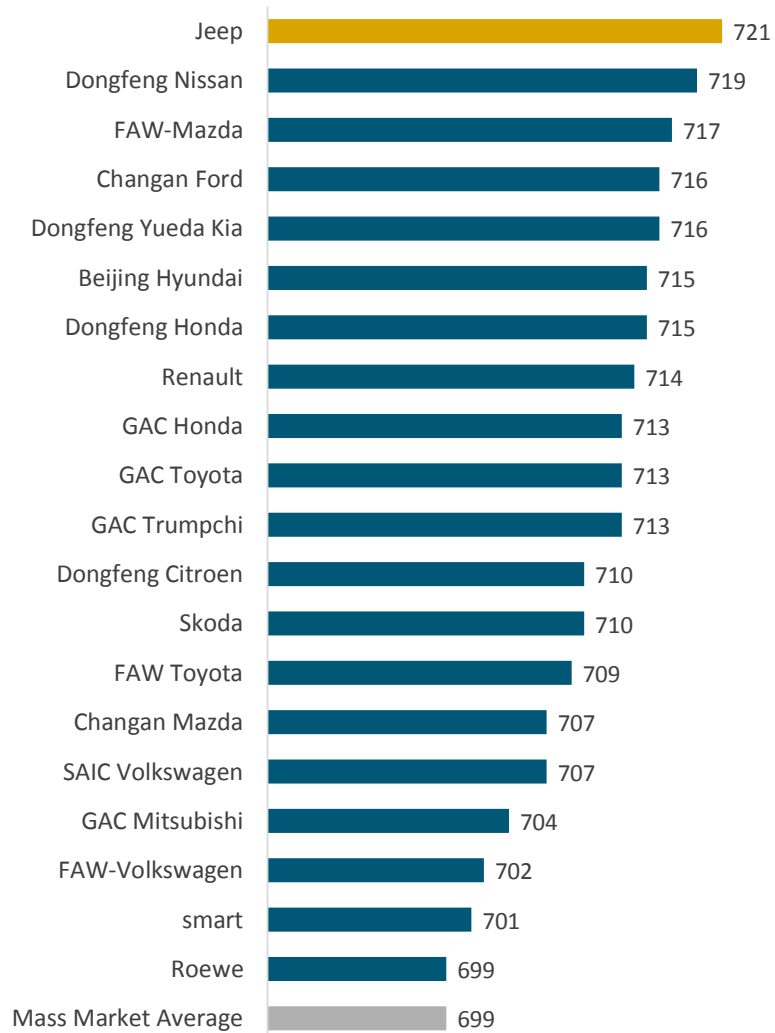
Source: J.D. Power 2018 China Automotive Performance, Execution and Layout (APEAL) StudySM

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2018 APEAL Nameplate Index Ranking—Mass Market

(Based on a 1,000-point scale)



Source: J.D. Power 2018 China Automotive Performance, Execution and Layout (APEAL) StudySM

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Top Three Models per Segment in APEAL Car Segment

Compact Highest Ranked: Hyundai Reina Geely Kingkong Baojun 310W	Midsize Upper Economy Highest Ranked: Kia K4 Cachet BYD Qin Geely GC9
Compact Upper* Highest Ranked: Honda Fit Kia K2	Midsize Upper Highest Ranked: Volkswagen Passat Mazda 6 Atenza Honda Accord
Midsize Basic Highest Ranked: Honda City Fengfan Hyundai Celesta Peugeot 301	Compact Luxury Highest Ranked: Audi A4L BMW 3 Series Mercedes-Benz CLA-Class
Midsize Highest Ranked: Nissan Sylphy Classic Honda Crider Nissan Sylphy	Midsize Luxury Highest Ranked: Cadillac XTS Toyota Crown Lexus ES

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

Note: To qualify for an award in the 2018 China APEAL Study, models must meet the following criteria: 1. Four models must meet the required sample threshold (at least 100 samples) for inclusion in segment ranking. Or, three models must meet the required sample threshold (at least 100 samples) to be included in segment ranking and the sales volume of these related three models must achieve at least 80% of total market share within that segment during the sampling period; 2. At least one model within a segment with sufficient sample size must perform better than its segment average.

Source: J.D. Power 2018 China Automotive Performance, Execution and Layout (APEAL) StudySM

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Top Three Models per Segment in APEAL SUV, MPV, Van Segments

Small SUV Highest Ranked: Haval H2 Changan CS15 FAW Besturn X40	Midsize Luxury SUV Highest Ranked: Porsche Macan BMW X3 Audi Q5
Compact SUV Highest Ranked: Citroen C3-XR Ford EcoSport Honda XR-V	Large Luxury SUV* Highest Ranked: Porsche Cayenne Mercedes-Benz GLE-Class
Midsize SUV Highest Ranked: Honda CR-V Jeep Cherokee Hyundai Tucson	Compact MPV Highest Ranked: Changan Oushang A800 Changan Linmax Baojun 730
Large SUV Highest Ranked: GAC Trumpchi GS8 Ford Edge Volkswagen Teramont	Midsize MPV* Highest Ranked: Volkswagen Touran L Dongfeng Future Lingzhi
Compact Luxury SUV* Highest Ranked: BMW X1	Large MPV* Highest Ranked: Buick New GL8 Honda Odyssey Buick All New GL8

New-Energy Vehicle

Top 3

BYD Qin BYD Tang Roewe eRX5

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

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