

### **APEAL Scores Continue to Rise; Performance and Technology Experience Become Core Growth Drivers, J.D. Power Finds**

#### Land Rover, FAW-Volkswagen and Chery Rank Highest in Respective Segment

**SHANGHAI: 11 Jun, 2026** – Owner’s focus on the emotional appeal and excitement of their new vehicle has risen appreciably from last year, with performance, entering and exiting the vehicle and infotainment system driving the higher satisfaction. The overall satisfaction score for internal combustion engine (ICE) vehicles this year is 762 points (on a 1,000-point scale) increasing by 11 points from 2025, according to the 2026 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>. The leading areas of higher satisfaction – vehicle performance, entering and exiting the vehicle and infotainment system – have increased year over year by 21 points, 17 points and 17 points respectively. Additionally, getting in and out of the vehicle and infotainment system also gain significant weight in the overall APEAL index, indicating that ICE vehicle owners are placing greater emphasis on intelligent interaction.

At brand level, China domestic brands and mass market international brands continue momentum from 2025, increasing 13 points each to 758 and 760 points, respectively. Premium brands have rebounded by 4 points to 770 points following a brief decline in 2025; however, the gap between premium brands, mass market and domestic brands continues to narrow, signaling an inevitable eroding of differentiation.

The study, now in its 24<sup>th</sup> year, examines ICE vehicle owners’ assessment 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.

“Improvement in ICE vehicle technology performance has been driven not only by the innovation of NEV technologies, but also by the growing adoption of hybrid models,” said **Sean Wang, general manager of vehicle product competitiveness solutions at J.D. Power China**. “Hybrids have broken the energy conversion efficiency bottleneck and deliver notably better power as well as performance improvements for noise, vibration and harshness (NVH). Currently, hybrids are mostly offered by international and premium brands and command a price premium compared to conventional ICE vehicles. However, as consumer demand for intelligence, performance and fuel economy continues to grow, more domestic brands are expected to join the competition.

“ICE vehicle sales in Tier-3 and Tier-4 cities have fallen dramatically while new electric vehicle (NEV) penetration rates are growing, reflecting strong demand for fuel efficiency and technology features in lower tier markets. OEMs need to rethink their ICE product strategy for these markets to defend this important customer base. In addition, higher satisfaction among female owners of ICE vehicles is far lower than among male owners, whereas female owner satisfaction with NEVs has increased by 16 points this year. OEMs need to adapt ICE vehicle design in a timely manner to better retain female customers.”

Following are some key findings of the 2026 study:

- **Premium and entry-level markets shrink simultaneously:** Domestic brands dominate the price segment lower than RMB 100,000 as their share has risen to 71% this year from 65% since 2024,

yet they have not been able to break through the RMB 200,000+ segment ceiling. Premium brands hold a commanding share of the RMB 300,000+ segment and have increased their share in the RMB 200,000 -300,000 segment to 41% from 34% since 2024.

- **Black and white are the most preferred vehicle colors:** Year over year, the combined share of paint color for black and white ICE vehicles has risen to 85% from 78% and to 65% from 62% for NEVs. ICE vehicle customers are increasingly opting for classic and conservative colors, minimizing color risk by choosing black, white or grey.
- **ICE-only is trending down in premium segment; hybrids become a mainstream option:** The share of hybrid models in the premium segment has risen steadily to 43.4% in 2026 from 30.8% in 2024, exceeding the segment average. Premium brands are systematically integrating hybrid electric vehicle (HEV) technology into their mainstream portfolio, aiming to improve the performance, efficiency and refinement of the conventional powertrain via electrification to redefine premium ICE vehicles.

## Study Rankings

**Land Rover** ranks highest among premium brands with a score of 824. **Porsche** (813) ranks second and **Lexus** (790) ranks third.

**FAW-Volkswagen** ranks highest among mass market brands with a score of 780. **Chery** (776) ranks second and **Haval** (774) ranks third.

**Chery** ranks highest among Chinese domestic brands with a score of 776. **Haval** (774) ranks second and **GAC Trumpchi** (772) ranks third.

The segment-level APEAL awards by brand are **Volkswagen Lavida Pro; Volkswagen Lamando L; Geely Emgrand; Geely Binyue L; Changan CS55 Plus; Changan CS75 Pro; Mercedes-Benz E-Class** and **Mercedes-Benz GLB-Class**.

Other models that rank highest in their respective segment are **MG 5; Lexus ES; Volkswagen Magotan; Cherry Tiggo 8 Plus; GAC Trumpchi GS8; Cadillac XT5; Toyota Highlander 785; Land Rover Range Rover** and **Buick All New GL8**.

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 2026 study is based on responses from 14,184 owners of ICE vehicles who purchased their new vehicle between July 2025 and February 2026. The study includes 131 models and 37 different brands, among which 127 models and 37 brands achieved sufficient samples. The study was fielded from January through April 2026 in 81 major cities across China.

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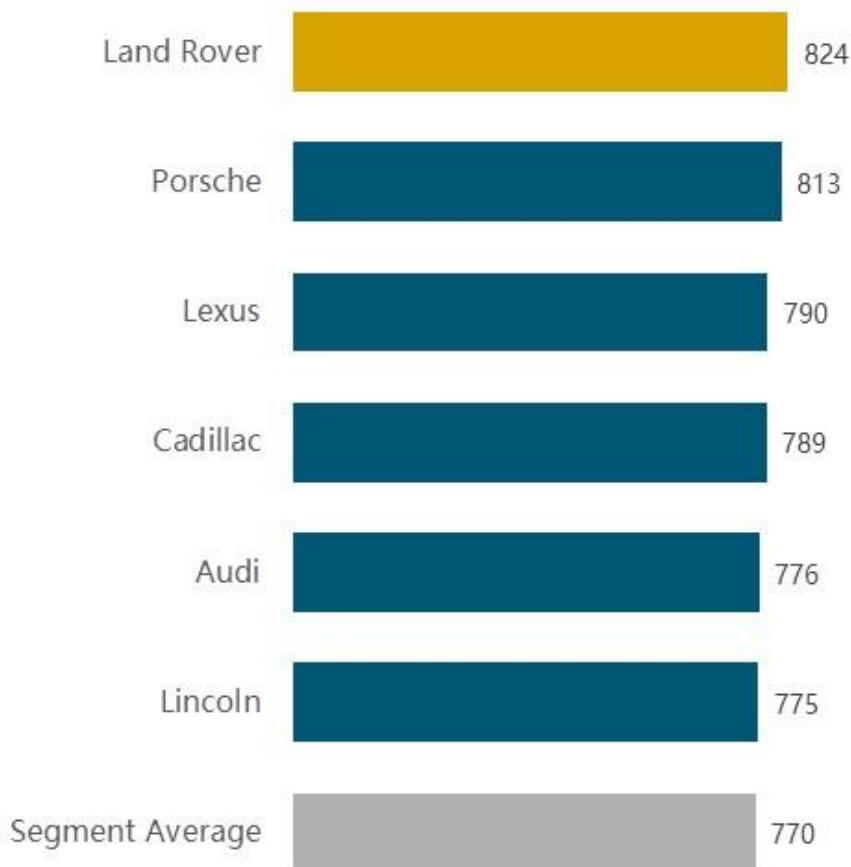
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NOTE: Six charts follow.

# J.D. Power 2026 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

## APEAL Brand Index Ranking Premium Brands

*(Based on a 1,000-point scale)*



*Notes: In alphabetical order if there are tie scores.*

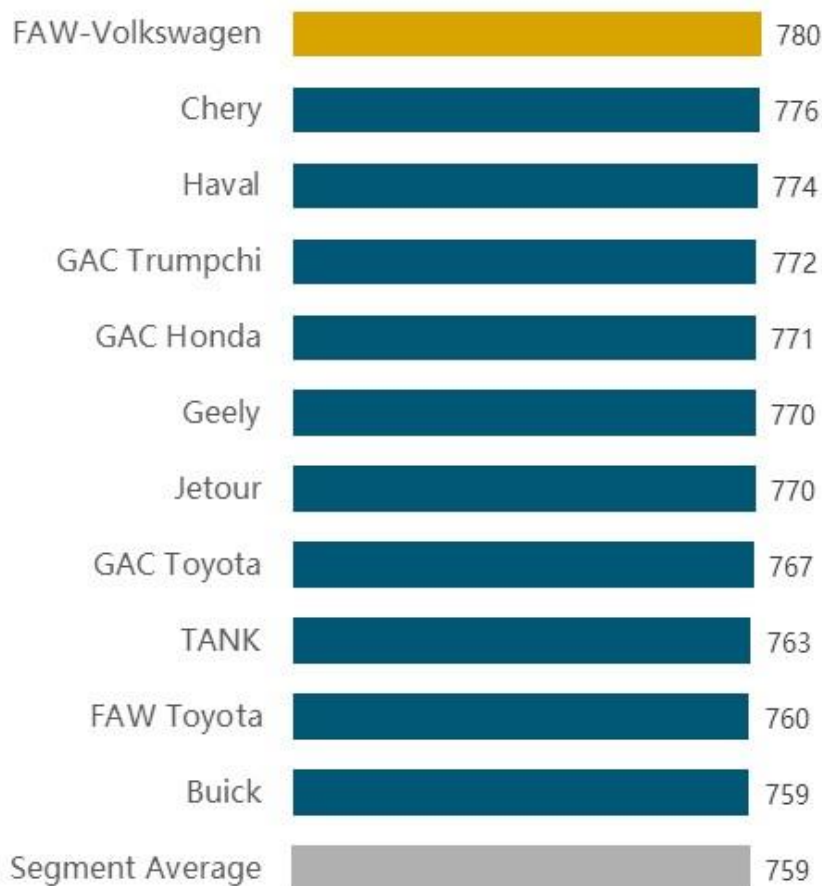
*Source: J.D. Power 2026 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>*

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## APEAL Brand Index Ranking Mass Market Brands

*(Based on a 1,000-point scale)*



*Notes: In alphabetical order if there are tie scores.*

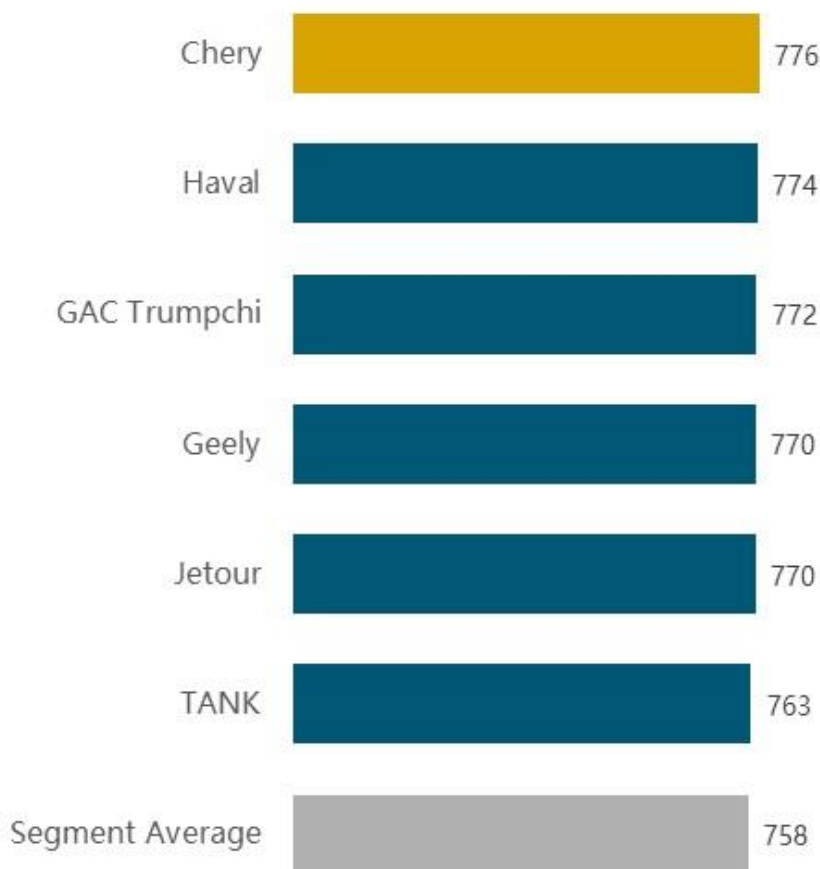
*Source: J.D. Power 2026 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>*

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## APEAL Brand Index Ranking Domestic Brands

(Based on a 1,000-point scale)



Notes: In alphabetical order if there are tie scores.

High-end domestic brand – a brand is classified as High-end domestic when more than 50% of model sales are in the High-end domestic segment. A model is classified as High-end domestic when the average of MSRP is higher than RMB150,000;

Source: J.D. Power 2026 China Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

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## Top Three Models per Segment

### *Car Segments*

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#### Compact Car

**Highest Ranked: MG 5**

Second Ranked: Roewe i5 (tie)

Second Ranked: Volkswagen Lavida XR (tie)

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#### Compact Upper Car

**Highest Ranked: Volkswagen Lavida Pro**

Second Ranked: Changan Eado (tie)

Second Ranked: Toyota Levin (tie)

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#### Compact Premium Car

**Highest Ranked: Lexus ES**

Second Ranked: Audi A5L

Third Ranked: Cadillac CT5

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#### Midsize Economy Car\*

**Highest Ranked: Geely Emgrand**

Second Ranked: Volkswagen Bora

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#### Midsize Car

**Highest Ranked: Volkswagen Lamando L**

Second Ranked: Chery Arrizo 8 Pro

Third Ranked: Geely Preface

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#### Midsize Upper Car

**Highest Ranked: Volkswagen Magotan**

Second Ranked: Toyota Avalon

Second Ranked: Honda Accord

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#### Midsize/Large Premium Car\*

**Highest Ranked: Mercedes-Benz E-Class**

Second Ranked: Audi A6L

*Notes: In alphabetical order if there are tie scores. \* No other model in this segment performs above segment average.*

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## Top Three Models per Segment

### *SUV Segments*

#### Compact SUV\*

**Highest Ranked: Geely Binyue L**  
Second Ranked: GAC Trumpchi GS3 Yingsu

#### Compact Upper SUV\*

**Highest Ranked: Changan CS55 Plus**  
Second Ranked: Lynk & Co 06

#### Compact Premium SUV\*

**Highest Ranked: Mercedes-Benz GLB-Class**  
Second Ranked: Audi Q3  
Third Ranked: Lexus NX

#### Midsize Economy SUV

**Highest Ranked: Changan CS75 Pro**  
Second Ranked: Chery Tiggo 7 Plus  
Third Ranked: Geely Boyue

#### Midsize SUV

**Highest Ranked: Chery Tiggo 8 Plus**  
Second Ranked: Chery Tiggo 8  
Third Ranked: Haval Big Dog

#### Midsize Upper SUV

**Highest Ranked: GAC Trumpchi GS8**  
Second Ranked: Volkswagen Tiguan L  
Third Ranked: Chery Tiggo 8L

#### Midsize Premium SUV

**Highest Ranked: Cadillac XT5**  
Second Ranked: Lexus RX  
Second Ranked: Lincoln Nautilus

#### Large SUV

**Highest Ranked: Toyota Highlander**  
Second Ranked:  
Toyota All New Land Cruiser Prado  
Third Ranked: Volkswagen Tiguan L Pro

#### Large Premium SUV

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

*Notes: In alphabetical order if there are tie scores. \* No other model in this segment performs above segment average.*

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## Top Three Models per Segment *MPV Segments*

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### Compact MPV\*

**Highest Ranked: Wuling Hongguang S**  
Second Ranked: Wuling Hongguang V

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### Midsize MPV\*

**Highest Ranked: GAC Trumpchi M8**

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### Large MPV

**Highest Ranked: Buick All New GL8**  
Second Ranked: Toyota Sienna  
Second Ranked: Buick New GL8

*Notes: In alphabetical order if there are tie scores. \* No other model in this segment performs above segment average.*

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