

## Overall Vehicle Appeal Improves; In-Vehicle Technology Remains Problematic

Lexus Ranks Highest among All Nameplates;

Honda N-WGN, Mazda Demio, Audi A3 and Toyota Alphard Rank Highest in Their Respective Segments in New-Vehicle Appeal in Japan

**TOKYO: 24 September 2015** – While overall vehicle APEAL has improved, satisfaction with in-vehicle technology continues to be a trouble spot for the industry, especially with ACEN, according to the J.D. Power Asia Pacific 2015 Japan Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup> released today.

The study, now in its fifth year, examines how gratifying a new vehicle is to own and drive. Owners evaluate their vehicle across 77 attributes, grouped into 10 categories of vehicle performance: exterior; interior; storage and space; audio/ communication/ entertainment/ navigation (ACEN); seats; heating, ventilation and air conditioning (HVAC); driving dynamics (driving performance); engine/ transmission; visibility and safety; and fuel economy. Satisfaction is calculated on a 1,000-point scale.

The overall APEAL score averages 628 points in 2015, increasing by 6 points from 2014. Satisfaction has improved in all categories by 3 to 8 points except ACEN, which remains the same at 592 from 2014. The interior (620) and seats (607) categories improve the most by 8 points each, followed by exterior (647) and fuel economy (642), up by 7 points each.

“While interior roominess, exterior styling and fuel economy have helped drive overall satisfaction with vehicle appeal, performance in the ACEN category remains unchanged from last year, even though a higher percentage of vehicles are equipped with this technology,” said **Atsushi Kawahashi, senior director of the automotive division at J.D. Power Asia Pacific**. “Manufacturers need to continuously improve this technology in order to offer customers more appealing vehicles. When customers are satisfied with the appeal of a vehicle, they are more likely to repurchase the same brand or recommend it to friends and family.”

### APEAL Score Average Per Segment:

- Mini-car segment: 603
- Compact segment: 619
- Midsize segment: 658
- Large segment<sup>1</sup>: 709
- Minivan segment: 624

### Segment Key Findings:

- Across four of the five segments, satisfaction with ACEN has decreased by 1 to 7 points from 2014, with the only exception of mini-car, which is up by 7 points to 574. The compact segment has declined the most, down by 7 points to 583.
- The largest overall improvement in APEAL is in the mini-car and midsize segments, up by 7 points each from 2014. Satisfaction has also improved in the compact (+2 points), large (+3) and minivan (+2) segments.

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<sup>1</sup> For a segment award to be issued, there must be at least three models with 67 percent of market sales in any given award segment. In the large segment, these criteria were not met, so no award has been presented.

- In the midsize segment, satisfaction has increased by a significant 16 points in the exterior category. In the mini-car segment, satisfaction has increased by 10 points or more in the interior (+10 points), HVAC (+12) and seats (+13) categories.
- In the minivan segment, satisfaction has increased by a significant 24 points in the fuel economy category, driven by an increase in the percentage of hybrid vehicles in this segment to 34 percent, up 6 percentage points from 2014.

### **Additional Key Findings**

- Achieving high scores in overall APEAL can generate high levels of recommendations and repurchase intention. The study finds that 93 percent of highly satisfied vehicle owners (overall satisfaction scores of 900 or higher) say they “definitely would” or “probably would” recommend the same vehicle model to others, an increase from 88 percent in 2014, and 94 percent say they “definitely would” or “probably would” repurchase the same brand, up from 90 percent in 2014.
- Among the five top reasons customers consider when purchasing a new-vehicle, the two most important are fuel economy/ range (42%) and price/ payment (36%); however, these reasons have decreased in importance by approximately 2 percent each. All of the remaining reasons to purchase a new-vehicle have increased, including exterior styling (32%), interior roominess (31%) and the image the vehicle portrays (31%), suggesting that reasons not related to fuel economy and price are becoming more important when purchasing a new vehicle.

### **2015 APEAL Ranking Highlights:**

**Lexus** ranks highest among nameplates, with an overall APEAL score of 748, followed by **BMW** with a score of 703 and **Mercedes-Benz** with 694.

### **Top Three Models Per Segment:**

- **Mini-car segment:** Honda N-WGN ranks highest, followed by Honda N-BOX and Daihatsu Move
- **Compact segment:** Mazda Demio ranks highest, followed by Toyota AQUA and Honda Fit
- **Midsize segment:** Audi A3 ranks highest, followed by Subaru Levorg and Subaru WRX in a tie
- **Minivan segment:** Toyota Alphard ranks highest, followed by Toyota Vellfire and Honda Odyssey

The study is used extensively by manufacturers worldwide to help them design and develop more appealing vehicles and by consumers to help them in their purchase decisions. The 2015 Japan APEAL Study is based on responses from 18,649 purchasers of new vehicles in the first two to nine months of ownership. The study includes 16 automotive brands and 121 models and ranks models with a sample size of 100 or more usable returns. The study was fielded from May through June 2015.

### **About J.D. Power Asia Pacific**

J.D. Power Asia Pacific has offices in Tokyo, Singapore, Beijing, Shanghai and Bangkok that conduct customer satisfaction research and provide consulting services in the automotive, information technology and finance industries. Together, the five offices bring the language of customer satisfaction to consumers and businesses in Australia, China, India, Indonesia, Japan, Malaysia, Philippines, Taiwan, Thailand and Vietnam. Information regarding J.D. Power Asia Pacific and its products can be accessed through the Internet at [japan.jdpower.com](http://japan.jdpower.com).

### **About McGraw Hill Financial [www.mhfi.com](http://www.mhfi.com)**

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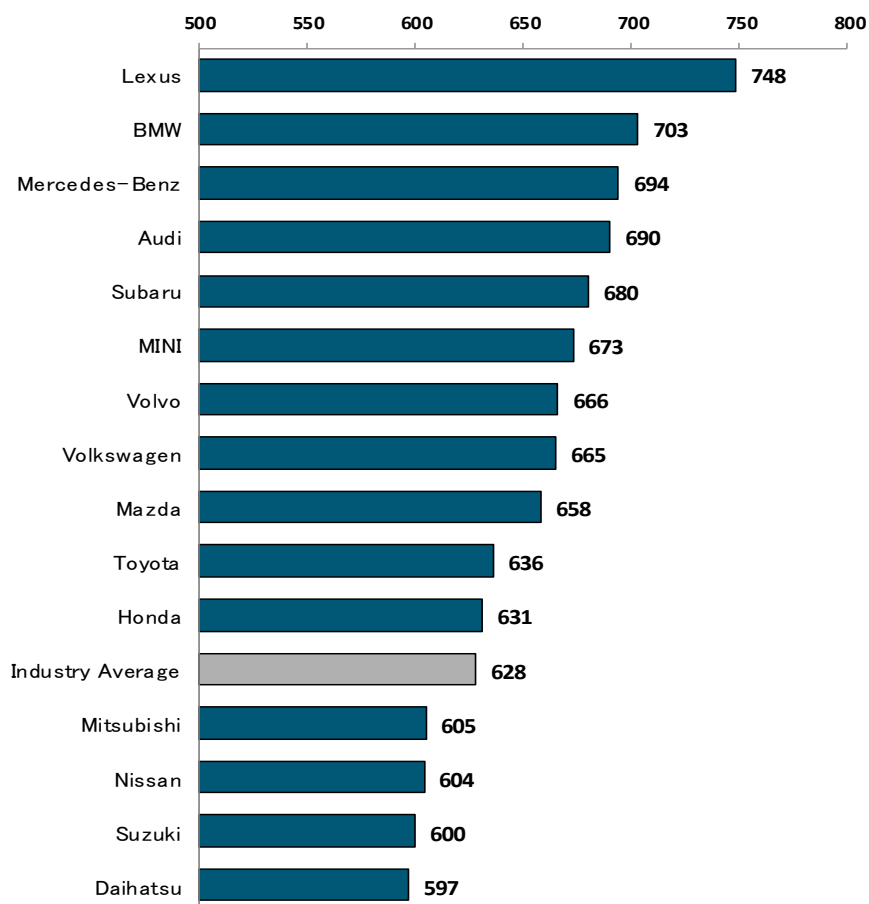
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Note: Two charts follow.

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## 2015 Nameplate APEAL Ranking

(Based on a 1,000-point scale)



Note: Included in the study, but not ranked due to small sample size is Fiat

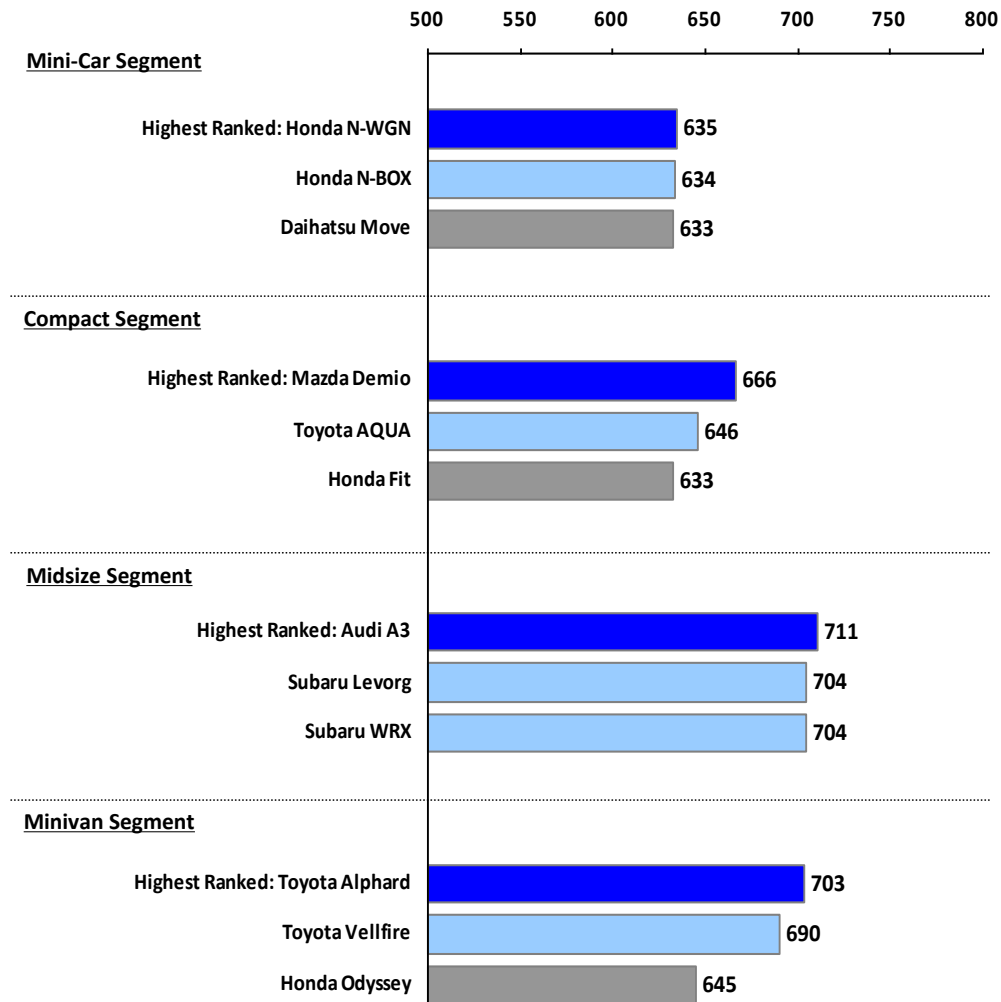
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## Top Three Models per Segment

(Based on a 1,000-point scale)



*Note: Official rankings are published only for segments with at least three models with sufficient sample that comprise 67 percent of market sales within an award segment. Therefore, no official rankings are published for the large segment*

*Source: J.D. Power Asia Pacific 2015 Japan Automotive Performance, Execution, and Layout (APEAL) Study<sup>SM</sup>*

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