



## Press Release

### **J.D. Power Asia Pacific Reports: Owners Who Have Downsized Their Vehicle Seek Fuel Economy, but Are Uncompromising on Exterior Styling and Performance**

#### Lexus Ranks Highest in New-Vehicle Appeal in Japan

**TOKYO: 27 September 2012** — New-vehicle owners who downsize to smaller vehicles in favor of better fuel economy or vehicle maintenance costs rate their vehicles as less appealing, particularly in the areas of exterior styling and vehicle dynamics, than owners who replace vehicles within the same segment, according to the J.D. Power Asia Pacific 2012 Japan Automotive Performance, Execution and Layout (APEAL) Study.<sup>SM</sup>

The study, now in its second year, measures what gratifies owners with vehicle performance and design during the first two to nine months of ownership. Overall APEAL scores are based on 95 owner evaluations grouped into 10 categories of vehicle performance. The categories are: exterior; interior; storage and space; audio/entertainment/navigation; seats; heating, ventilation, and air conditioning (HVAC); dynamics (driving performance); engine/transmission; visibility and driving safety; and fuel economy.

In 2012, the overall industry APEAL index score averages 691 points on a 1,000-point scale, three points higher than in 2011. The segment averages for the compact and mini-car segments, which account for 56 percent of industry market share, are 12 points and 29 points, respectively, below the industry average.

The study finds that APEAL scores are lower among owners who downsized to a smaller vehicle compared with buyers who purchased within the same segment. While those who downsized account for approximately 30 percent of all respondents in the study, they comprise 43 percent and 38 percent of midsize and compact segment owners in the study, respectively. Owners who downsized from a larger vehicle account for 28 percent of the respondents in the mini-car segment.

More than 80 percent of owners who downsize indicate that maintenance costs and fuel economy were important considerations for them at the time of purchase, compared with approximately 70 percent of buyers who purchased within the same segment as their previous vehicle. Although APEAL scores for fuel economy are 30 points higher among owners who downsize than same-segment buyers, the overall APEAL score of buyers who downsize is 15 points lower.

In addition, although downsizing and same-segment buyers place approximately the same importance on exterior styling and driving dynamics at the time of purchase, satisfaction scores provided by buyers who downsize in these categories are 17 and 24 points lower, respectively.

“Although buyers who downsize to smaller cars in pursuit of fuel economy or lower maintenance costs are satisfied with the fuel economy they’re getting, from the perspective of overall vehicle appeal, their satisfaction with exterior styling and dynamic performance shows notable room for improvement,” said

Atsushi Kawahashi, senior director of the automotive division at J.D. Power Asia Pacific, Tokyo. “Buyers often judge their vehicle based on their previous ownership experiences, so it is critical for automakers to fully understand the expectations today’s consumers have for fuel efficiency, as well as styling and handling, and reflect those perspectives in their product development and marketing.”

The study finds that owners who are highly satisfied with their new vehicle also have strong intentions to recommend their vehicle to others. The proportion of owners who indicate that they “definitely will” recommend their vehicle to friends and acquaintances is 25 percent among owners who find their purchased vehicle highly appealing, or those whose overall APEAL scores are among the top 25 percent in overall APEAL score (794 points or higher). The proportion decreases to just 9 percent among owners whose overall APEAL scores are in the second-highest 25 percent (score between 691 and 793 points).

Other key findings include:

- Vehicle exterior continues to be the most important factor contributing to vehicle appeal, comprising approximately 25 percent of the total APEAL score in all five vehicle segments.
- Fuel economy receives the highest ratings in the mini-car, compact, and midsize segments, while vehicle exterior receives the highest scores in the large and minivan segments.

### **2012 APEAL Ranking Highlights**

Lexus ranks highest with an overall APEAL score of 803 points. Mercedes Benz (789) ranks second, and BMW (771) ranks third.

The rankings in the four award segments include:

- Honda N BOX ranks highest in the mini-car segment, followed by Daihatsu Mira Cocoa and Daihatsu Move Conte rank second in a tie.
- Volkswagen Polo ranks highest in the compact segment, followed by Nissan Juke and Nissan Cube, respectively.
- Lexus CT200h ranks highest in the midsize segment, followed by Volkswagen Golf/Golf Cabriolet/Golf Variant and Mazda Axela, respectively.
- Nissan Elgrand ranks highest in the minivan segment, followed by Toyota Alphard and Toyota Vellfire, respectively.

The 2012 Japan Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup> is based on responses from 10,758 purchasers of new vehicles in the first two to nine months of ownership. The study includes 16 automotive brands and 97 models and ranks models with sample size of 100 or more usable returns. The study was fielded from late May to early June 2012.

The Japan Automotive Performance, Execution and Layout (APEAL) Study is one of eight consumer-based benchmark studies conducted by J.D. Power Asia Pacific in Japan. Other 2012 studies conducted by J.D. Power Asia Pacific include:

- The Japan Winter Tire Customer Satisfaction Index Study was released in late May 2012
- The Japan Initial Quality Study (IQS), which measures problems experienced by new-vehicle owners during the first two to nine months of ownership, was released in late August 2012.
- The Japan Sales Satisfaction Index (SSI) Study, which measures satisfaction with the new-vehicle sales process, was released in late August 2012.
- The Japan Customer Satisfaction Index (CSI) Study, which measures overall customer satisfaction with service performed at automotive dealer facilities, was released in late September 2012.
- The Japan Original Equipment Tire Satisfaction Study will be released in October.

- The Japan Navigation Systems Customer Satisfaction Index Study, which measures customer satisfaction with original equipment and aftermarket navigation systems, will be released in October 2012.
- The Japan Replacement Tire Satisfaction Study will be released in November 2012.

#### **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 China, India, Indonesia, Japan, Malaysia, Philippines, Taiwan and Thailand. Information regarding J.D. Power Asia Pacific and its products can be accessed through the Internet at [www.jdpower.com](http://www.jdpower.com). Media e-mail contact: [shizue\\_hidaka@jdpower.co.jp](mailto:shizue_hidaka@jdpower.co.jp)

#### **About J.D. Power and Associates**

Headquartered in Westlake Village, Calif., J.D. Power and Associates is a global marketing information services company providing performance improvement, social media and customer satisfaction insights and solutions. The company's quality and satisfaction measurements are based on responses from millions of consumers annually. For more information on [car reviews and ratings](#), [car insurance](#), [health insurance](#), [cell phone ratings](#), and more, please visit [JDPower.com](http://JDPower.com). J.D. Power and Associates is a business unit of The McGraw-Hill Companies.

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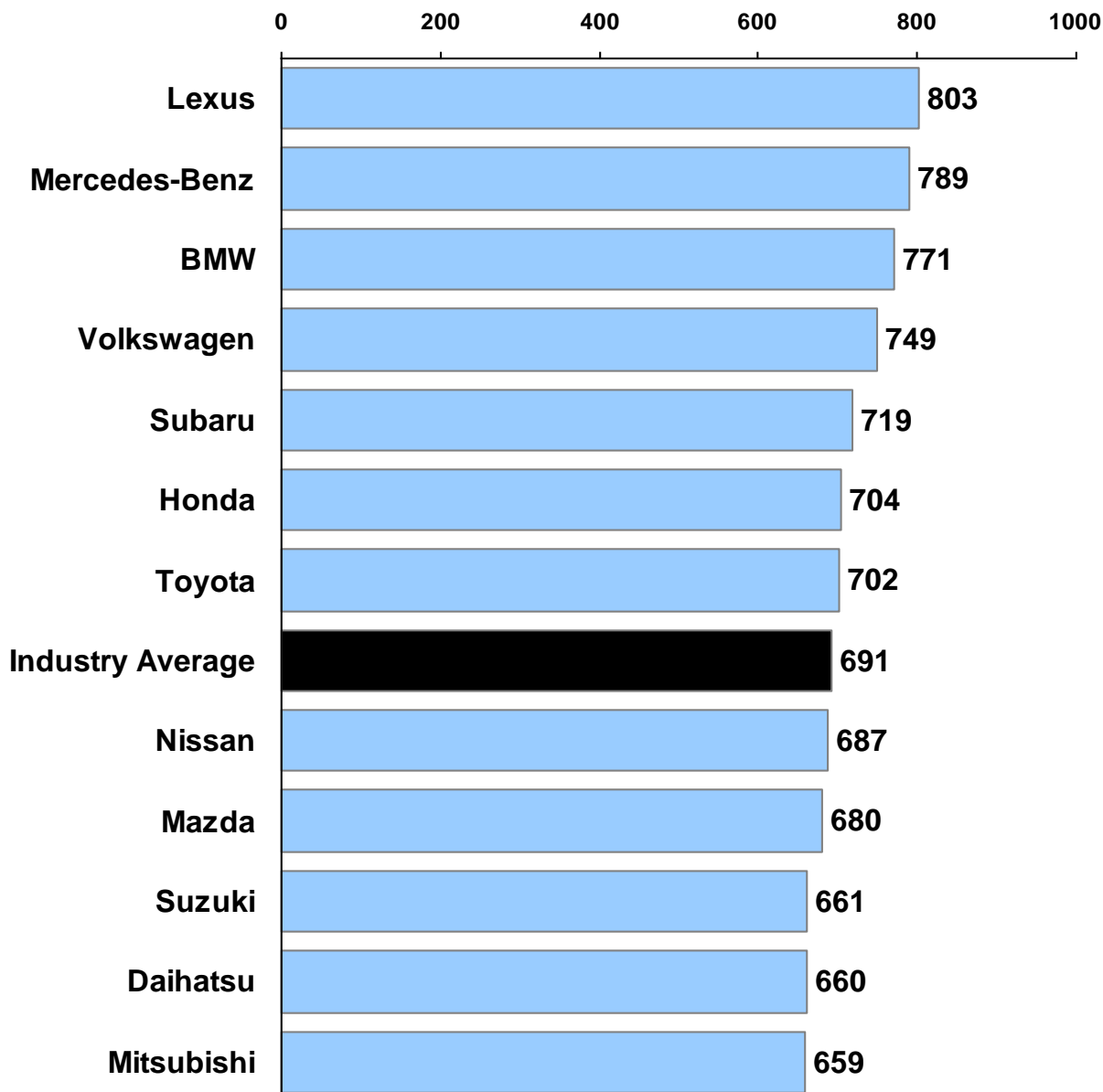
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NOTE: Two charts follow

# J.D. Power Asia Pacific 2012 Japan Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

## 2012 Nameplate APEAL Ranking

(Based on a 1,000-point scale)



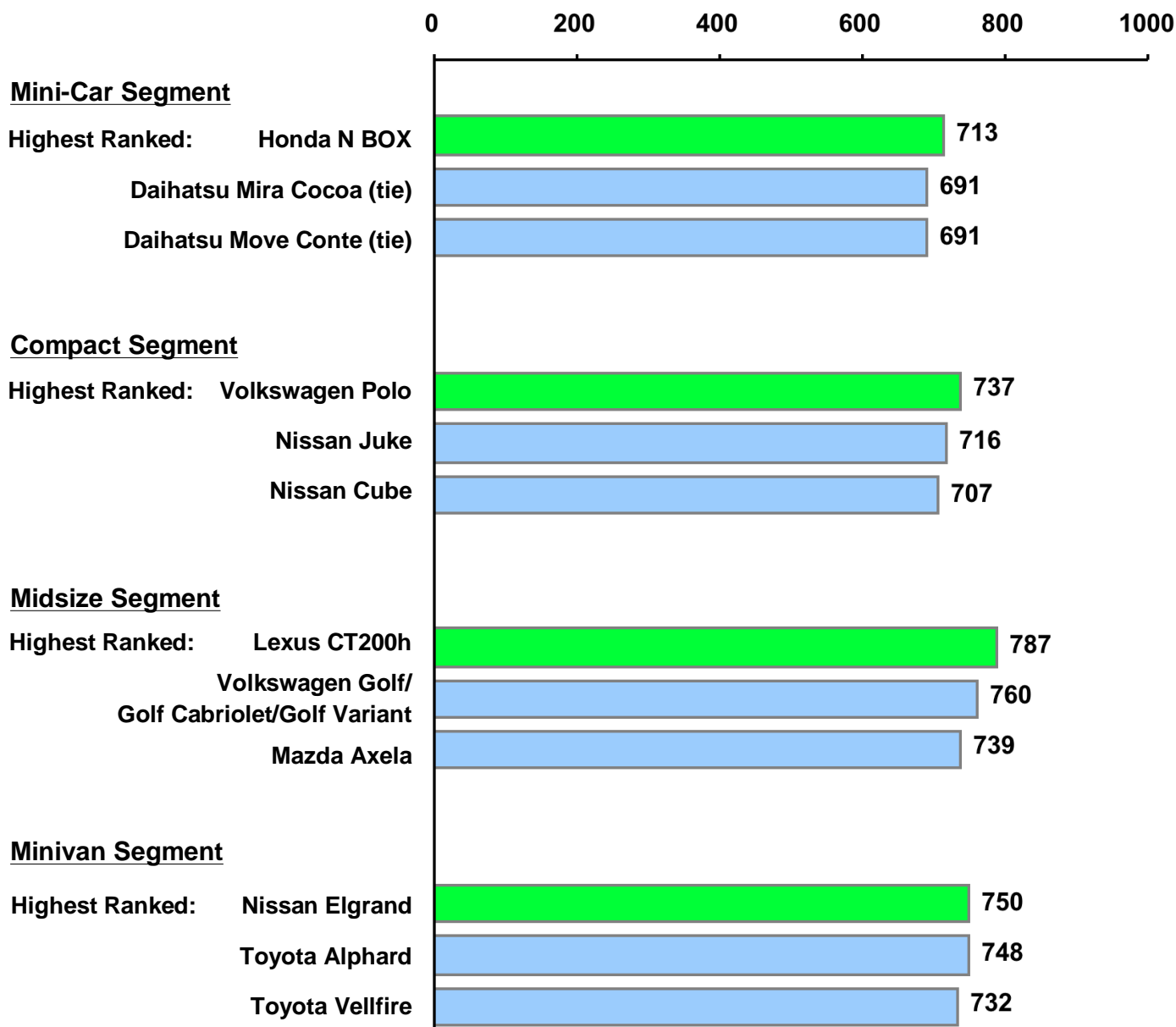
Included in the study, but not ranked due to small sample size are: Audi, Fiat, MINI and Volvo.

Source: J.D. Power Asia Pacific 2012 Japan Automotive Performance, Execution, and Layout (APEAL) Study<sup>SM</sup>

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# J.D. Power Asia Pacific 2012 Japan Automotive Performance, Execution and Layout (APEAL) Study<sup>SM</sup>

Top Three Models per Segment  
(Based on a 1,000-point scale)



Note: For a segment award to be issued, there must be at least three models with sufficient sample within an award segment. There was only one large car model with sufficient sample size, therefore, no large car awards have been presented.

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