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Media Contact:

Sammy Park, Managing Director
ConsumerInsight
Email: sammy.park@consumerinsight.kr
Phone: +82-2-6004-7661

Yanghyuk Kim, Research Fellow
ConsumerInsight
Email: kimyh@consumerinsight.kr
Phone: +82-2-6004-7604

ConsumerInsight Quantifies the 'Say-Do Gap' in Car Buying: 52% Planned to Buy Within Two Years, Only One in Four Followed Through

Korea's first large-scale, longitudinal study of the consumer 'Say-Do Gap' tracks 29,182 consumers over two years, showing that stated purchase intent remains a powerful demand signal — intenders went on to buy at nearly than double the rate of non-intenders.

The Say-Do Gap Series Ⅰ: Intention vs. Purchase within Two Years

- First domestic study to quantify the consumer intention-to-purchase conversion rate, based on an unprecedented large-scale, longitudinal dataset of individually matched respondents.
- In 2023, 52% of tracked consumers said they intended to buy a vehicle within two years.
- By July 2025, only 25% of those intenders — one in four — had actually purchased a vehicle.
- Among consumers with no purchase plan, 13% went on to buy a vehicle anyway.
- Of all actual buyers, roughly two-thirds had originally intended to buy and one-third had not.
- Among planned buyers, only 44% purchased their originally preferred brand, and just 21% purchased their exact preferred model.

SEOUL, South Korea — April 23, 2026 — ConsumerInsight, a leading automotive market research firm, today released new findings on the consumer 'Say-Do Gap' — the difference between what consumers say they intend to do and what they actually do — based on large-scale automotive survey data matched at the individual respondent level.

The analysis asks a simple question: among consumers who said in 2023 that they planned to buy a vehicle within two years, how many had actually done so by July 2025? The answer: about one in four. At the same time, even among consumers who said they had no plan to buy, about one in eight purchased a vehicle anyway. It is the first time this intention-to-behavior gap has been measured in Korea using individually matched, longitudinal data at this scale.

One in Four Intenders Followed Through

In the 2023 survey, 52% of matched respondents said they intended to buy a vehicle within two years [Table 1]. By the 2025 follow-up, 13% of all matched respondents were consumers who had expressed that intention and then actually purchased. Converted to the base of planned buyers, the actual-purchase conversion rate was 25% — meaning only one in four who said they would buy actually did so within the period.

The gap also showed up on the other side of the market. Respondents with no two-year purchase plan made up 48% of the matched sample. Among them, 6% of the total sample — 13% within that group — purchased a vehicle anyway, roughly half the conversion rate of the intention group.

Overall, 19% of matched respondents purchased a vehicle by 2025. Of those buyers, about two-thirds had originally said they intended to buy, and one-third had not — underscoring that stated intention, while informative, captures only part of who ultimately enters the market.

[Table 1] Comparison of Automotive Purchase Intention and Actual Behavior (The Say-Do Gap) *Based on continuous respondents (N = 29,182)*

Category	% of Total Respondents
With Purchase Intention	**52**
└ Actually Purchased	13
└ Did Not Purchase	39
Without Purchase Intention	**48**
└ Actually Purchased	6
└ Did Not Purchase	42
Total Actual Buyers	**19**

A Meaningful Signal, Despite the Gap

ConsumerInsight said the results point to a meaningful distance between stated plans and actual behavior: only 25% of intenders followed through, and 13% of non-intenders bought anyway. At the same time, the purchase rate among intenders was nearly double that of non-intenders, confirming that purchase intention remains a valuable — if imperfect — demand signal for automakers and marketers.

The Gap Extends to Brand and Model Choice

The Say-Do Gap was not limited to whether consumers bought a vehicle — it also appeared in what they bought. Among all actual buyers, 31% purchased the brand they had originally preferred, and 14% purchased their exact preferred model [Table 2]. On the base of purchase intenders alone, the equivalent rates were 44% and 21% — meaning only about one in five intenders ended up with both their preferred brand and preferred model. ConsumerInsight noted that real-world constraints such as available budget, new model launches, delivery timing, promotions, and taxes can significantly reshape a consumer's final choice.

[Table 2] Profile Analysis of Actual Car Buyers *Based on actual car buyers (N = 5,495)*

Buyer Segment	% of Total Buyers	Notes
Planned Buyers	**70**	*Had purchase intention prior to buying*
└ Purchased Preferred Brand	31	*Of the 31 points, 14 also involved the exact preferred model*
└ Purchased Alternative Brand	39	
Unplanned Buyers	**30**	*Had no purchase intention*

From Theory to Data: Measuring the Say-Do Gap at Unprecedented Scale

The Say-Do Gap has long been discussed in academic and industry circles, largely on a theoretical basis or through small-scale, cross-sectional studies. ConsumerInsight's analysis is significant for quantifying the phenomenon using individually matched, longitudinal data from roughly 29,182 consumers tracked over two years — a scale with few, if any, precedents worldwide.

Building on this release, ConsumerInsight plans to continue publishing multi-angle analyses of the Say-Do Gap — examining which consumer segments show the widest gaps, which vehicle categories are most affected, and how economic conditions or new model launches shape the shift from intention to purchase. The goal is to help automakers and marketers design and execute more precise, evidence-based strategies.

Notes

Say-Do Gap: In this release, the term refers to the difference between a respondent's stated 2023 two-year vehicle purchase intention and actual vehicle purchase behavior observed by the July 2025 follow-up. (ConsumerInsight Annual Automobile Syndicated Study, 2023–2025 matched analysis)

Survey base: Figures are based on 29,182 respondents who answered both the July 2023 and July 2025 surveys. The survey population consists of licensed drivers who own a vehicle or plan to purchase one, so results may differ from a general-consumer survey. (ConsumerInsight Annual Automobile Syndicated Study)

Percentage bases: The 52% purchase-intention share is among all matched respondents. The 25% conversion rate is among purchase intenders only. The 13% figure for intenders who purchased is the share of all matched respondents who both intended and bought. (ConsumerInsight Annual Automobile Syndicated Study)

Brand/model basis: Preferred-brand and preferred-model purchase rates are reported as 31% and 14% on the actual-buyer base (N = 5,495), and as 44% and 21% on the planned-buyer base. (ConsumerInsight Annual Automobile Syndicated Study)

Methodology

ConsumerInsight used data from its Annual Automobile Syndicated Study, conducted every July since 2001 with an annual sample of roughly 100,000 automotive consumers (95,696 respondents in the 2025 wave). This analysis matched 29,182 respondents who participated in both the 2023 and 2025 waves and compared each respondent's 2023 stated intention to purchase within two years with their actual vehicle purchase behavior as of the July 2025 survey.

- Population: Licensed drivers who own a vehicle or plan to purchase one within two years
- Sampling frame: ConsumerInsight's Invight Panel and quota-based samples from major Korean portal-site panels
- Sampling method: Gender- and age-based quota sampling
- Survey mode: Email and mobile survey
- Survey content: Usage & Attitude (U&A) and Consumer Experienced Quality (CEQ)
- Survey period: July 2023 and July 2025

About ConsumerInsight

ConsumerInsight is a leading South Korean market research firm specializing in automotive consumer data and analytics. Since 2001, it has conducted the Annual Automobile Syndicated Study, surveying approximately 100,000 automotive consumers every July — one of the largest continuous automotive consumer studies in the world. Drawing on more than two decades of longitudinal data, ConsumerInsight provides in-depth insight into consumer behavior, market trends, and industry benchmarks.

For more information, please visit https://www.consumerinsight.co.kr/eng/