FOR IMMEDIATE RELEASE

Media Contact:
Seungpyo Park, Executive Vice President
ConsumerInsight
Email: sammy.park@consumerinsight.kr
Phone: +82-2-6004-7661

One in Three Premium-Car Intenders Bought a Mass-Market Brand Instead, ConsumerInsight Finds

Latest "The Say-Do Gap" auto study shows purchase plans hold much more strongly for domestic, mass-market and RV choices than for imported and premium intentions.

(The Say-Do Gap Series: Part 3)

- 33% of premium-brand intenders bought a mass-market brand, while 5% of mass-market intenders moved to premium.
- Plan realization was much higher for mass-market brands and domestic cars, at 95% and 94%, than for premium brands and imported cars, at 67% and 71%.
- Among premium brands, BMW led with a 65% realization rate, followed by Mercedes-Benz at 52% and Genesis at 42%.
- RV intentions held more strongly than sedan intentions: 91% versus 73%. Midsize RVs had the highest segment/body-type realization rate at 81%.
- Gasoline and EV intenders each posted 71% realization, compared with 63% for HEV and 30% or lower for LPG and diesel.

SEOUL, South Korea – May 20, 2026 – ConsumerInsight today released the third report in its "The Say-Do Gap" series, examining how consumers' stated auto purchase intentions changed by the time they actually bought a new car. The analysis tracks one-year purchase intenders by origin, brand tier, vehicle type and segment, and fuel type.

The central finding: among consumers who said they intended to buy a premium brand within one year, one in three, or 33%, ultimately bought a mass-market brand. By contrast, only 5% of those who intended to buy a mass-market brand moved the other way and bought a premium brand. The result shows a clear gap between aspiration and final purchase behavior, with some consumers shifting from imported or premium plans toward domestic or mass-market choices at the point of purchase.

At the final payment stage, 'compromising with budget reality'

The Say-Do Gap was largest in brand tier and vehicle origin. The plan realization rate—meaning the share who bought a car with the same attribute they originally intended—was 67% for premium-brand intenders and 71% for imported-car intenders [Table 1]. In comparison, 95% of mass-market-brand intenders bought a mass-market brand, and 94% of domestic-car intenders bought a domestic car.

[Table 1] Purchase Intention Realization Rate by Brand-Tier and Origin

Category	Realization Rate (%)	Attrition Rate (%)
By Brand-Tier		
Premium Brands	67	33
Mass-Market Brands	95	5
By Origin		
Imported Cars	71	29
Domestic Cars	94	6

Premium Top-Three Realization Rates: BMW Highest, but Attrition Paths Differ

Brand-level results also varied sharply among the three major premium brands covered in the report. BMW had the highest plan realization rate at 65%, followed by Mercedes-Benz at 52% and Genesis at 42%, with gaps of more than 10 percentage points between adjacent brands [Table 2]. Among BMW intenders, 19% chose a Hyundai Motor Group brand, while 2% moved to Mercedes-Benz. Among Mercedes-Benz intenders, 17% chose BMW and 13% chose Kia. Genesis had the lowest realization rate among the three, but 39% of Genesis intenders chose a Hyundai Motor Group brand, limiting effective group-level attrition.

[Table 2] Purchase Intention and Top Attrition Paths for Premium Brands

Intended Brand (Sample Size)	Realization Rate (%)	Attrition Paths (Destination & Rate)
Genesis (n=142)	**42**	1. Hyundai (22%), 2. Kia (17%), 3. BMW (4%) 4. Mercedes-Benz (2%)
BMW (n=62)	**65**	1. Kia (11%),2.Hyundai (5%), 3. Genesis (3 %) 4. Mercedes-Benz (2%)
Mercedes-Benz (n=46)	**52**	1. BMW (17%), 2. Kia (13%), 3. Genesis (4% each)

'Mid-size RV' realization rate highest at 81%

By vehicle type, practical choices were more likely to hold. RV intenders had a 91% realization rate, compared with 73% for sedan intenders. Looking at segment and body type together, midsize RVs had the highest realization rate at 81%, followed by small sedans at 67%, small RVs and large sedans at 66% each, and large RVs at 62%. Midsize sedans recorded the lowest rate among the listed attributes, at 55%.

The hybrid paradox: a lower realization rate than gasoline

Fuel-type results showed a hybrid paradox. Gasoline and pure electric vehicle intenders each had a 71% plan realization rate, while hybrid intenders recorded 63%. LPG and diesel were each at 30% or lower. ConsumerInsight said the figures suggest that understanding not only intended demand but also the reasons consumers switch at purchase time is critical for automakers and marketers.

Notes

- Analysis base: The analysis is based on 31,852 respondents who participated continuously in ConsumerInsight's 2024~2025 annual auto survey, then focuses on consumers who stated in 2024 that they planned to buy a new car within one year and actually bought a new car. (ConsumerInsight 2024~2025 Annual Automobile Syndicated Study analysis)

- Metric definition: "Plan realization rate" means the share of buyers who purchased a car with the same attribute they originally intended, such as the same origin, brand tier, vehicle type/segment or fuel type. (ConsumerInsight definition in report)

- RV definition: RV refers to recreational vehicles, contrasted with sedans in the vehicle-type analysis. (ConsumerInsight report terminology)

Methodology

ConsumerInsight compared plan realization rates across five dimensions: origin (domestic vs. imported), brand tier (premium vs. mass-market), vehicle type (sedan vs. RV), vehicle segment (large, midsize and small) and fuel type. The broader annual auto survey has been conducted each July since 2001 among about 100,000 auto consumers; this report's longitudinal analysis used 31,852 continuous participants in the 2024~2025 survey and narrowed the findings to 2024 one-year new-car planners who actually purchased a new car.

About ConsumerInsight

ConsumerInsight is a leading South Korean market research firm specializing in automotive and telecommunications data analytics. With over 25 years of accumulated consumer data and a robust annual syndicated study of 100,000 respondents, ConsumerInsight provides unparalleled insights into consumer behavior, market trends, and industry benchmarks.

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