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Renault Korea Tops Domestic Mass-Market Brands with 79% Purchase Realization Rate, ConsumerInsight Finds

Mass-market brand intenders followed through on their plans far more often than premium-brand intenders, with realization rates of 73% versus 50%, the latest 'Say-Do Gap' analysis shows.

The Say-Do Gap Series Ⅳ: Domestic Mass-Market Brand Purchases within One Year

- 73% of consumers who planned to buy a domestic mass-market brand ultimately purchased the brand they originally intended, far above the 50% realization rate for premium-brand intenders.
- Renault Korea posted the highest realization rate among mass-market brands at 79%, edging out market leaders Hyundai (76%) and Kia (75%).
- Renault Korea's strong retention was driven largely by its flagship SUV, the 'Grand Koleos'.
- Hyundai and Kia intenders showed extensive cross-brand switching with each other, though 90% of Hyundai intenders and 88% of Kia intenders still ended up buying within Hyundai Motor Group.
- Movement toward Genesis, Hyundai Motor Group's premium brand, was minimal among mass-market intenders.

SEOUL, South Korea — May 29, 2026 — ConsumerInsight today released the fourth report in its 'The Say-Do Gap' series, examining brand purchase realization rates among domestic mass-market car intenders. The central finding: 73% of consumers who planned to buy a domestic mass-market brand within one year ultimately purchased a vehicle from their originally intended brand, a rate that significantly surpasses the 50% realization rate observed among major premium-brand intenders. Renault Korea posted the highest realization rate of the three major mass-market brands, at 79%, edging out Hyundai (76%) and Kia (75%), the two dominant players in Korea's mass-market segment.

This analysis is based on 1,127 respondents — drawn from 31,852 continuous participants in ConsumerInsight's 2024–2025 Annual Automobile Syndicated Study — who stated in 2024 that they planned to buy a new car within one year and completed that purchase. Realization rates and attrition paths were examined for the three major domestic mass-market brands with a minimum sample size of 30: Hyundai, Kia and Renault Korea. GM Korea and KG Mobility (KGM) were excluded from the brand comparison due to insufficient sample size.

Renault Korea's Strong Showing Driven by the 'Grand Koleos'... Attention Turns to Successor Model

Among major domestic mass-market brands, Renault Korea achieved the highest realization rate at 79% [Table]. This means four in five consumers who planned to buy a Renault Korea vehicle followed through without switching brands, a rate that also modestly outpaces those of Hyundai (76%) and Kia (75%), the two brands that dominate

Korea's mass-market segment.

[Table] Comparison of Actual Purchase Brand Among Domestic Mass-Market Car Intenders (Realization Rate)

Unit: %. Columns show the brand intended in 2024; rows show the brand actually purchased in 2025.

Category	Intended Brand ('24)		
	Hyundai (n=285)	Kia (n=336)	Renault Korea (n=47)
Actual Brand ('25)			
Hyundai	**76**	13	4
Kia	14	**75**	4
Renault Korea	3	6	**79**
GM Korea	–	–	2
KGM	2	–	2
Genesis	1	–	4
BMW	–	2	–
Mercedes-Benz	–	–	2

Note: Only the three domestic mass-market brands with 30+ samples in both intended and actual-purchase groups are compared as columns. Five additional brands, including GM Korea and KGM, are shown as rows to capture attrition paths. Actual-purchase-brand shares below 1.0% are shown as en dashes (–).

Renault Korea's high realization rate reflects strong, target-driven purchasing behavior and support from a loyal enthusiast base, powered chiefly by its core model, the 'Grand Koleos'. Favorable word of mouth about the model's product quality and value for money helped convert intenders into actual buyers, keeping attrition to a minimum. Whether the brand can introduce a successor model capable of sustaining that momentum remains an open question.

Hyundai and Kia Engage in Active 'Customer Exchange'

Hyundai and Kia, the two brands that lead Korea's domestic auto market, posted solid realization rates of 76% and 75% respectively, underscoring their deep base of core demand as mass-market brands. Notably, the two brands showed an active pattern of cross-brand movement: the leading alternative for Hyundai intenders was Kia (14%), while the leading alternative for Kia intenders was, in turn, Hyundai (13%). This suggests that many consumers who deviated from their original plan chose their 'sister brand' as the primary substitute, in effect trading customers between the two.

In total, 90% of Hyundai intenders and 88% of Kia intenders ended up purchasing a vehicle from within Hyundai Motor Group, with attrition outside the group limited to about 10% — an unusually high level of brand-group loyalty. After the sister brand, Renault Korea drew the next-largest share of switching intenders: 6% of Kia intenders and 3% of Hyundai intenders moved to Renault Korea, pointing to a distinct appeal for Renault Korea among Korea's three mass-market brand groups.

By contrast, movement toward Genesis, the group's premium brand, was minimal. This points to a duality in the Genesis brand: it can be read either as a successful 'independent premium brand' that mass-market intenders find difficult to reach, or as a brand that has yet to become the object of consumers' aspirations to trade up.

Mass-Market Realization Rate at 73% Overwhelms Premium Cars (50%)

Consumers of domestic mass-market cars showed a clear tendency to follow through on their initial brand choice. Including GM Korea and KGM, the average realization rate across the five domestic mass-market brands, 73%, far exceeded the 50% average realization rate for the three major premium brands (Genesis, BMW and Mercedes-Benz). In other words, 'The Say-Do Gap' phenomenon was relatively less pronounced in the mass-market segment than in the premium segment — a pattern ConsumerInsight attributed to the fact that the value mass-market brands offer, such as cost-effectiveness and practicality, aligns more closely with consumers' real-world budgets and needs, leaving less room for attrition.

Renault Korea leads on realization rate, but its limitations are clear. The brand's strength effectively rests on a single model, the Grand Koleos, and it has yet to break the dominant position of Hyundai Motor Group, where a powerful oligopoly effect — driven by active cross-brand movement among its own mass-market brands — remains firmly in place. That one well-made model is performing so strongly deserves credit, but that success could prove no more than a 'temporary effect' when measured against the group's far broader model lineup and brand power.

Notes

Analysis base: This analysis is based on 31,852 respondents who participated continuously in ConsumerInsight's 2024–2025 Annual Automobile Syndicated Study, narrowed to 1,127 consumers who stated in 2024 that they planned to buy a new car within one year and actually did so. (ConsumerInsight 2024–2025 Annual Automobile Syndicated Study)

Metric definition: 'Plan realization rate' means the share of buyers who purchased a car from the same brand they originally intended. (ConsumerInsight definition)

Sample criteria: Realization rates and attrition paths are shown for the three domestic mass-market brands with a minimum sample size of 30 among both intenders and actual purchasers (Hyundai, Kia and Renault Korea); GM Korea and KG Mobility (KGM) were excluded from the brand comparison due to insufficient sample size. Five brands, including GM Korea and KGM, were added to the actual-purchase-brand rows to capture attrition paths. Actual-purchase-brand shares below 1.0% are shown as en dashes (–) in the table. (ConsumerInsight report terminology)

Hyundai Motor Group brands: For the purposes of this report, Hyundai Motor Group brands comprise Hyundai, Kia and Genesis. (ConsumerInsight report terminology)

Methodology

ConsumerInsight analyzed brand purchase realization rates among domestic mass-market car intenders, comparing the brand each respondent intended to buy in 2024 with the brand actually purchased in 2025. The broader Annual Automobile Syndicated Study has been conducted every July since 2001 among approximately 100,000 automotive consumers. This report's longitudinal analysis matched 31,852 respondents who participated continuously in the 2024–2025 survey, narrowed to 1,127 who planned a purchase within one year and completed it.

- Population: Licensed drivers who own a vehicle or plan to purchase one within one year
- 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 2024 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.

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