LATEST HARRISX STUDY FOR AUTOMOTIVE LEADERS

The Loyalty Illusion

10 Key Findings from HarrisX Future of the Car Research:
UK, Germany & France

New HarrisX research across the UK, Germany and France — a survey of 3,278 vehicle owners — reveals ten interconnected findings that challenge long-held assumptions about automotive brand loyalty, consumer decision-making, and competitive risk from new entrants. The gap between what consumers say and what they do is wider than most OEMs assume.

Preference vs. Resilience

Automotive brands have long measured loyalty through stated preference. But in a more volatile environment — marked by Chinese entrants, price sensitivity, and AI-powered comparison — the more important question is **resilience**: how stable those preferences remain when friction, uncertainty, or a cheaper competitor enters the picture.

PREFERENCE	RESILIENCE
“Do consumers like this brand?”	“What happens when conditions get harder?”
Static perception metric	Stress test of actual behaviour
Measures emotional affinity	Measures resistance to switching

The Loyalty Illusion

The stated-vs-revealed loyalty gap.

69% of consumers say they would choose the same brand again. Yet actual same-brand repurchase behaviour averages only ~33%, with brand-level figures ranging from 24% to 43%. Brand loyalty is roughly twice as strong in stated form as in revealed behaviour — the single most striking finding in the study.

Loyalty collapses under vehicle line up pressure.

If a chosen vehicle became unavailable, only 14% would stay within the same brand, but switch to a different model. Most would either cross-shop segments (22%) or consider a different brand entirely (19%). Consumers appear far more attached to vehicle type than to the brand itself.

A 10–20% price gap flips nearly a third of buyers.

28% say they would switch to a competing brand if it were 10–20% cheaper. Approximately six in ten would switch at a 30% price difference. Pricing, not emotional attachment, is doing the heavy lifting in retention.

Friction is the top in-funnel churn trigger.

44% say unexpected costs or pricing changes would make them abandon a brand they were actively considering — the single highest switching trigger. Poor dealer experience (33%) ranks second. Pricing transparency and the quality of the dealer interaction are retention tools as much as brand-building ones.

Reliability drives loyalty but diverges sharply by price point.

Reliability remains the strongest purchase driver overall (56%), followed closely by value for money (54%). Reliability matters significantly more among budget-conscious buyers than luxury buyers, while ‘best value’ (18%) and ‘brand trust’ (16%) emerge as the strongest direct drivers of loyalty intent. This creates a meaningful opening for Chinese brands competing aggressively on value, technology, and ownership economics — particularly where incumbent brands struggle to clearly defend value perception.

The China Challenge

1 in 3 European buyers are now open to a Chinese brand.

27% are likely (Top 2 Box) to consider a Chinese brand for their next vehicle, rising to 34% in the UK. Critically, 37% are neutral rather than opposed, suggesting the ceiling is much higher than current awareness reflects. Chinese brands are appealing primarily on best value (52%), innovative technology (41%), and cost efficiency (36%), the same factors already driving defection.

“Country of origin” as a barrier is eroding fast.

Only 38% say country of origin matters when choosing their next vehicle brand, and among those already open to Chinese brands, this falls further still. The protectionist tailwind available to European incumbents is weaker than many assume. For OEMs, competitive pressure is strongest where value perception is weak, product differentiation is unclear, or ownership economics are hard to defend.

Tesla's perception is bifurcating.
Only 36% of all respondents say Tesla "represents the future of driving" (Top 2 Box) — but this rises to 53% among those open to Chinese brands and falls to just 26% among those who are not. Tesla's brand equity is now most concentrated among the consumers most likely to switch to a new entrant, a structural vulnerability for the brand.

AI and the Erosion of Friction

Consideration is now the hardest stage of the purchase journey.
30% of buyers rate finding the right options as difficult, and 27% struggle to compare brands and models — both higher than difficulties at the purchase or ownership stages. This is precisely where consumers are turning to AI to close the gap, and where weaker brands are most exposed to substitution.

AI is already the #2 most influential research tool.
Among all research sources, AI ranks second in purchase influence behind only visiting a dealership or taking a test drive. 1 in 3 consumers already used AI tools (such as ChatGPT or Gemini) during their most recent vehicle purchase — to evaluate value for money (36%), compare vehicles (36%), and build confidence in decisions (32%).

Looking ahead, 74% say they are likely to use AI to compare cars for their next purchase, rising above 90% among buyers spending £80,000+. Historically, brands controlled discovery and comparison. As AI reduces friction in the consideration phase, weak loyalty becomes easier to expose and competitor brands easier to discover.

Executive Implications for OEMs

Taken together, these ten findings point to a market where brand preference remains important but is no longer sufficient to secure the next purchase. Loyalty is being tested against value, reliability, ownership cost, ease of comparison, and increasingly capable competitive alternatives — and Chinese entrants are competing directly on every one of those dimensions. Meanwhile, AI is making it easier for consumers to search wider, compare faster, and challenge default brand choices before they ever walk into a showroom.

The strategic question for OEMs is no longer simply: "Do consumers prefer your brand?" **But instead:** "How resilient is that preference once friction, uncertainty, and competitive pressure enter the system?"

The brands most likely to succeed will be those that deliver against the fundamentals consumers actually use to make decisions, reduce friction at every stage of the purchase journey, and maintain confidence under pressure — especially in the consideration phase where AI is now reshaping discovery.

Want to explore the study further? Interested in more HarrisX automotive industry insights?

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