Automotive Brand Loyalty Rates Show Mixed Results, according to S&P Global Mobility

SOUTHFIELD, Mich., Aug. 28, 2025 /PRNewswire/ -- Industry brand loyalty rates declined slightly in the first half of 2025 following last year's rebound, according to a new S&P Global Mobility analysis of new vehicle registration data through June.

The industry's brand loyalty rate through June stood at 51.1%, down 1.4 percentage points (PPs) from the same period in 2024. The decrease marks a reversal from 2024's year-over-year gain, showing continued volatility in loyalty trends as the market continues to stabilize post-pandemic.

Both mainstream and luxury brands contributed to the decline as more than half of all brands tracked experienced year-over-year loyalty declines of one percentage point or more. Competition from conquests and evolving inventory dynamics reshaped consumer decision-making resulting in a higher rate of defections.

"The loyalty rate shift this year reflects the balance between a steady return-to-market volume and strong competition among brands," said **Vince Palomarez, Associate Director, Loyalty Product Management, S&P Global Mobility**. "Households are returning to market, but many are open to cross-shopping in ways we didn't see during the height of pre-pandemic loyalty."

Conquest Trends

While industry loyalty slipped, conquest volume rose in the first half of 2025. Conquest activity increased 7.6% among mainstream brands and 6.2% among luxury brands compared with the same period in 2024.

"Conquest opportunities are rebounding, particularly for luxury," said**Tom Libby, Loyalty Solutions and Industry Analysis Associate Director, S&P Global Mobility**. "As loyalty softened, brands that executed competitive conquest strategies were able to capture households more effectively."

Return-to-Market Dynamics

The number of households returning to market rose 4.2% year-over-year in the first half of 2025, representing the third consecutive year of improvement. While this growth provided a larger base of potential loyalists, it also created more opportunities for defections as brands competed aggressively for returning customers.

Additional mid-year highlights for 2025:

- General Motors led all multi-brand manufacturers with a loyalty rate of 68.1%.
- Ford topped all brands at 58.9% loyalty.
- Mini currently leads the industry in loyalty growth, improving its loyalty rate by +4.6 PPs year over year.
- The Chevrolet Equinox ranked as the model loyalty leader at 42.7%.

S&P Global Mobility experts will share more detail on the mid-year analysis during our**next Loyalty webinar** on **September 4 at 1:00 p.m. ET**. **Register** **here** to attend. A replay will be available to those who register.

About S&P Global Mobility

At S&P Global Mobility, we provide invaluable insights derived from unmatched automotive data, enabling our customers to anticipate change and make decisions with conviction. Our expertise helps them to optimize their businesses, reach the right consumers, and shape the future of mobility. We open the door to automotive innovation, revealing the buying patterns of today and helping customers plan for the emerging technologies of tomorrow.

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