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Driving Import Penetration in Egypt's Automobile Market

Factors Driving Import Penetration in Egypt's Automobile Market: A Conceptual Framework

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**Antecedents of Product Category Selection of Imported Versus Locally
Assembled Passenger Automobiles in the Egyptian Market**

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العوامل المؤثرة في تغلغل الاستيراد في سوق السيارات المصرية: إطار مفاهيمي

إعداد

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المعهد الكندي العالي للإدارة بالسادس من أكتوبر

بحث مُستل من رسالة دكتوراه بعنوان:

العوامل المؤثرة على اختيار نوع سيارات الركوب المستوردة والمجموعة محلياً في السوق المصري

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Abstract

The Egyptian passenger automobile market has witnessed growing penetration of imported vehicles, despite the existence of locally assembled alternatives. This study explores the determinants shaping Egyptian consumers' preferences between imported and locally assembled passenger automobiles. A qualitative design was employed, combining a systematic literature review with twenty semi-structured in-depth interviews of automobile consumers and two interviews with industry experts. Results reveal that imported automobiles are perceived as superior in terms of quality commitment, country of origin, originality, expertise, and credibility, while consumer ethnocentrism plays a marginal role in shaping preferences. After-sale services emerged as an additional critical determinant influencing choice. The findings provide a conceptual framework for understanding product category selection in emerging markets. This research contributes to marketing literature by clarifying the interplay of traditional and context-specific factors influencing consumer behavior, offering valuable insights for manufacturers and policymakers seeking to enhance the competitiveness of locally assembled vehicles in Egypt.

Keywords: Consumer Behavior in the Automobile Industry; Quality Commitment and Country-of-Origin; Brand Credibility and Originality; Expertise and After-Sale Services; Price Sensitivity

مستخلص البحث

شهد سوق سيارات الركوب المصري خلال السنوات الأخيرة زيادة ملحوظة في تفضيل السيارات المستوردة على الرغم من توافر بدائل مجمعة محلياً. تهدف هذه الدراسة إلى استكشاف العوامل المؤثرة في قرارات المستهلكين عند الاختيار بين السيارات المستوردة والمجمعة محلياً. اعتمد البحث على تصميم نوعي شمل مراجعة منهجية للأدبيات وعشرين مقابلة متعمقة شبه مهيكلة مع مستهلكين لسيارات الركوب الاقتصادية، إضافة إلى مقابلتين مع خبراء في صناعة السيارات. أظهرت النتائج أن المستهلكين المصريين ينظرون إلى السيارات المستوردة باعتبارها متفوقة من حيث الالتزام بالجودة، وبلد المنشأ، والأصالة، والخبرة، والمصداقية، في حين كان تأثير النزعة الاستهلاكية القومية محدوداً. كما برزت خدمات ما بعد البيع كعامل حاسم إضافي يؤثر في تفضيلات المستهلك. تسهم هذه النتائج في الأدبيات التسويقية من خلال تقديم إطار مفاهيمي يفسر

سلوك المستهلك في أسواق ناشئة مثل السوق المصري، وتقدم دلالات عملية لمصنعي السيارات وصانعي السياسات لتعزيز القدرة التنافسية للسيارات المجمعة محلياً. **الكلمات المفتاحية:** سلوك المستهلك في صناعة السيارات؛ الالتزام بالجودة وبلد المنشأ؛ مصداقية العلامة التجارية والأصالة؛ الخبرة وخدمات ما بعد البيع؛ الحساسية السعرية.

1. Introduction

The Egyptian passenger automobile market is one of the largest in the Middle East and North Africa, yet it faces structural imbalances between imported and locally assembled vehicles. In 2023, passenger car sales in Egypt reached approximately 202,000 units, representing a significant contraction compared to earlier years due to currency depreciation, supply shortages, and restrictive import policies (Fitch Solutions, 2024). Despite these pressures, imported vehicles—particularly from Europe, Japan, Korea, and the United States—remain strongly favored by Egyptian consumers across various income segments (Organisation Internationale des Constructeurs automobiles [OICA], 2023).

This dominance of imports is puzzling given the presence of local assembly plants operated through partnerships with multinational brands. While local assembly offers price advantages, consumers often associate imported automobiles with higher quality standards, advanced technologies, and stronger brand credibility. This presents both a market challenge and a research gap: why do Egyptian consumers consistently prefer imported vehicles despite the economic and policy incentives that support local assembly?

Existing literature emphasizes that factors such as country-of-origin (COO) perceptions, consumer ethnocentrism, quality commitment, originality, expertise, and credibility play critical roles in shaping automobile purchase decisions.

The purpose of this study is therefore to conceptualize the drivers of product category selection between imported and locally assembled passenger automobiles in Egypt through a qualitative exploratory approach. The study contributes to marketing scholarship in emerging markets by offering a conceptual framework that integrates both traditional behavioral antecedents and context-specific factors.

The paper is organized as follows. The next section outlines the research method. This is followed by findings that synthesize consumer and expert perspectives into a conceptual framework. The subsequent section presents the literature review, which discusses the theoretical foundations and prior empirical evidence related to consumer behavior, country-of-origin effects, quality commitment, brand credibility, originality, expertise, after-sale services, and price sensitivity. Finally, the concluding section reflects on theoretical and managerial implications, and recommendations for future research.

2. Research Method

A qualitative research design was employed to explore the antecedents of product category selection in the Egyptian passenger automobile market. The study combined a systematic literature review with exploratory research design.

The systematic review provided a theoretical foundation by identifying key factors influencing consumer decision-making in the automobile sector, particularly within emerging markets. These factors included consumer ethnocentrism, country of origin, quality commitment, originality, expertise, credibility, and after-sale services.

Primary data collection consisted of twenty semi-structured, in-depth interviews with Egyptian consumers of economy passenger automobiles. A convenience sampling approach was adopted, but care was taken to ensure heterogeneity in terms of gender, marital status, age, and income level. The sample included young adults, middle-aged participants, and older consumers, spanning low-, middle-, and high-income categories.

Additionally, two expert interviews were conducted to capture industry-level insights: one with the supply chain manager of Mercedes-Benz Egypt and another with the general manager of Arab Mechanics Group, an authorized dealer for Renault and KIA. These interviews provided perspectives from the supply and distribution side of the market.

All interviews were conducted face-to-face, recorded, and transcribed. The data were analyzed thematically to identify patterns and divergences in consumer perceptions of imported versus locally assembled vehicles. The integration of consumer perspectives, expert insights, and literature findings allowed for the development of a comprehensive conceptual framework.

3. Exploratory research

The qualitative study employed twenty semi-structured, in-depth interviews with a convenient sample of economy passenger automobile customers to gain insight into, and an in-depth understanding of, the research problem. The participants reflected a heterogeneous demographic profile in terms of gender, marital status, and income level, with males slightly more represented and most interviewees being married. The sample also spanned a broad range of age categories, including younger adults, middle-aged respondents, and older participants. Furthermore, the interviewees varied considerably in their income level, as evidenced by the presence of individuals from lower-, middle-, and higher-income levels. Furthermore, two in-depth interviews were conducted with Egyptian automotive industry experts, including the supply chain manager of Mercedes-Benz, and the general manager of Arab Mechanics Group (an authorized dealer for Renault and KIA).

The preliminary literature review has revealed a set of factors that affect customer behavior and thus might have potential effects on the product category selection of imported versus locally assembled passenger automobiles. These factors include consumer ethnocentrism, country of origin, quality commitment, originality, expertise, and credibility.

Customers were asked first to express their preferences regarding imported versus locally assembled passenger automobiles. Regardless of the price differences, the majority of participants prefer to have an imported automobile instead of a locally assembled one.

This result was consistent with their opinions regarding the superiority of imported automobiles over those locally assembled in some of the previously mentioned factors. More precisely, all of the participants believe that imported automobiles—compared to those locally assembled—are more committed to quality standards regarding automobile ingredients, artisans, and manufacturing and assembly processes. Also, most participants believe that imported automobiles are unique and significantly differ when compared to those locally assembled; in other words, they consider imported automobiles to be the original product. Moreover, the majority of customers are more trusting in manufacturers of imported automobiles and in the reliability of their promises when compared to those locally assembled. In addition, most of them prefer imported automobiles

with American, Japanese, European, or Korean countries of origin over those locally assembled.

Likewise, it was the opinion of both two experts. They think that Egyptian customers prefer to have imported automobiles because of their country of origin, quality commitment, originality, expertise, and credibility. However, the supply chain manager of Mercedes-Benz mentioned that these preferences were due to the lack of customer knowledge regarding quality levels of the Egyptian automotive industry and their wrong perceptions regarding the superiority of imported automobiles over those locally assembled in some other factors such as originality, expertise, and credibility.

When customers were asked to rate the importance of the six factors mentioned before in affecting the selection between imported passenger automobiles and those locally assembled, most participants admitted the importance of those factors except the consumer ethnocentrism factor that related to Egyptian product encouragement and national economy support. Only 5 out of 20 customers believe in the importance of such factors in affecting the product category selection of locally assembled passenger automobiles instead of imported ones. These results were completely consistent with the two experts' opinions.

When customers were asked to rate the importance of the six factors mentioned before in affecting their selection between imported and locally assembled passenger automobiles, most participants emphasized the relevance of the previously mentioned considerations. However, consumer ethnocentrism—linked to encouraging Egyptian products and supporting the national economy—was perceived as less influential compared to other factors. Only a minority of customers regarded it as shaping their preference for locally assembled automobiles. This view was confirmed by the two experts, who similarly highlighted its relatively minor importance in the decision-making process.

Regarding price sensitivity, slightly more customers think that the lower price of locally assembled passenger automobiles does not affect their decision to prefer imported automobiles over those locally assembled, but from experts' point of view, Egyptian customers are sensitive to price differences, and thus, such a factor might have a significant effect on their preferences.

Finally, customers were asked to rank the six factors (i.e., consumer ethnocentrism, country of origin, quality commitment, originality, expertise, and credibility) according to their relative importance in affecting the selection between imported passenger automobiles and those locally assembled. The results revealed that quality commitment is the most important factor, followed by the country-of-origin factor, and then expertise and credibility at the same level of importance. The originality factor was considered relatively less important, while consumer ethnocentrism was deemed the least important factor affecting the selection of imported versus locally assembled passenger automobiles. From the experts' point of view, the ranking of the six factors was slightly different. They think that the country-of-origin factor is the most important factor that affects the Egyptian customer's selection of imported versus locally assembled passenger automobiles. That is followed by the expertise factor, then quality commitment, credibility, and originality, respectively, and finally, consumer ethnocentrism is considered the least important factor in affecting the Egyptian customer's preferences.

Moreover, the customers have mentioned another set of factors that might affect their preferences. These factors include after-sale services (i.e., spare parts availability, maintenance, and warranty), automobile safety, options or trim level, fuel economy, luxury, vastness, and performance; customers' reviews; stage of life cycle or demographic characteristics (i.e., income level and profession, etc.); reputation; marketing efforts; nature of geographic area; and brand experience.

The after-sale services were the most frequent factor from customers' point of view, and the general manager of Arab Mechanics Group (an authorized dealer of Renault and KIA), confirmed the importance of such factors in affecting customers' selection of locally assembled versus imported passenger automobiles. So, the after-sale service factor has been proposed as a potential antecedent of product category selection for imported versus locally assembled passenger automobiles in the Egyptian market. The other factors will not be included in the research conceptual model due to the following justifications:

The automobile's safety was reflected in the quality commitment factor. The effects of factors such as fuel economy, options or trim level, luxury, and vastness will be ignored because the research is limited to the

economy automobiles category (with engines of 1,600 CC or smaller). The rest of the factors exhibit the lowest frequency.

4. Literature review

4.1. Quality commitment and product category selection

Quality commitment in automotive manufacturing is defined as the systematic pursuit of high product quality through the implementation of robust quality management systems, adherence to international standards, and the institutionalization of continuous improvement practices. This commitment is operationalized at both the organizational and employee levels, encompassing defect reduction, cost control, and the integration of quality into every stage of the product lifecycle—from design and production to after-sales service (Paslawski, 1992).

Employee quality commitment is a dynamic construct influenced by the stage of lean production implementation. In the early stages, extrinsic rewards (such as bonuses and recognition) are more salient, while intrinsic rewards (such as personal growth and job satisfaction) become increasingly important as lean practices mature (de Medeiros et al., 2025; J. Lee & Peccei, 2007). Management practices that foster group decision-making, training, empowerment, and continuous improvement are critical for sustaining long-term employee engagement and quality commitment.

The successful transition from imported to locally assembled vehicle production often hinges on the ability of management to adapt reward systems and support structures to the evolving needs of employees. Japanese Manufacturing Management (JMM) strategies, which emphasize culture change, consensus-building, and continuous improvement, have been particularly effective in embedding quality commitment within automotive organizations in diverse cultural contexts (Laosirihongthong et al., 2008).

The quality commitment plays a significant role in influencing the product category selection of imported versus locally assembled passenger automobiles. Quality commitment in this context refers to the dedication of manufacturers to ensure high standards in the production process, which encompasses design, craftsmanship, and the overall reliability of the vehicles (Attridge et al., 2005; Wilson, 2003). This commitment can manifest through various practices such as Total Quality Management

(TQM), strategic procurement, and supplier evaluation (Chakraborty et al., 2024; Fraser et al., 2013; Zhou et al., 2019).

Craftsmanship has evolved from a technical attribute to a holistic measure of perceived quality, integrating sensory, emotional, and cognitive dimensions. Premium imported vehicles often set the benchmark for craftsmanship, leveraging advanced manufacturing processes and close supplier collaboration to achieve high perceived quality. Locally assembled vehicles may face challenges in matching these standards due to disparities in production processes and supplier capabilities, but strong quality commitment and effective supplier integration can help bridge the gap (Scotland et al., 2005; Seidenfuss et al., 2010; Styliadis et al., 2017).

Quality commitment affects consumer behavior in the automobile industry by conveying both tangible and intangible signals that shape consumer perceptions, loyalty, and repurchase intentions. Quality commitment is defined as a manufacturer's dedication to maintaining high standards across product design and after-sales service, which translates into consumer trust and emotional attachment. Theoretical frameworks such as signalling theory and resource-based theory explain that high-quality commitment serves as a signal to reduce consumer uncertainty and build competitive advantage, influencing purchase behavior. Empirical evidence supports that consumer perception of quality commitment—through a blend of affective and calculative evaluations—enhances relationship quality, with mediators such as brand trust and perceived value playing central roles. Ultimately, consumer responses, such as loyalty, positive word-of-mouth, and sustained repurchase behavior, are reinforced through effective digital marketing strategies, sustainable practices, and culturally tailored communications (Bügel et al., 2010; Chakraborty & Jain, 2022; Grigoriou et al., 2016; Guajardo et al., 2016; Rahman et al., 2024).

Empirical studies support the relationship between quality commitment and product category selection. Research indicates that consumers' attitudes towards locally assembled vehicles, such as Proton and Perodua in Malaysia, are influenced by factors like country-of-origin, price-quality association, and value consciousness (Weng et al., 2023). These factors highlight the importance of perceived quality and its impact on purchase behavior. Additionally, studies on Japanese automakers show that high-quality production standards can be successfully transferred to international assembly plants, suggesting that quality commitment can

mitigate the perceived differences between imported and locally assembled vehicles (Lacetera & Sydnor, 2015).

Further, the role of supplier evaluation and selection strategies is critical in maintaining quality standards. Suppliers' performance and capabilities are influenced by the evaluation criteria set by manufacturers, which include quality, delivery, and price (Inemek & Tuna, 2009). Effective supplier management ensures that the components used in locally assembled vehicles meet the required quality standards, thereby enhancing the overall product quality (Zhou et al., 2019).

Also, studies have shown that consumer satisfaction, trust, and commitment are key determinants of relationship quality and behavioral intentions (Padin et al., 2017; Van Tonder et al., 2017). These factors are influenced by the perceived quality of the product and the service provided by the manufacturer and its dealerships.

The relationship between quality commitment and consumer behavior is multifaceted, involving factors such as trust and commitment in dealer relationships and service quality. Empirical evidence supports the notion that a strong commitment to quality by manufacturers can positively influence consumer behavior, leading to a preference for imported passenger automobiles over locally assembled ones.

4.2. Country-of-origin and product category selection

The globalization of the automobile industry has intensified competition and increased the complexity of consumer decision-making. In this context, the country-of-origin (COO) effect—how the perceived origin of a product or its components influences consumer attitudes and behaviors—remains a critical factor in shaping brand perceptions, trust, and purchase intentions. For marketers, understanding the nuances of COO is essential for effective positioning, segmentation, and communication strategies, especially as consumers become more discerning and markets more interconnected (Samiee et al., 2016; Sohail & Sahin, 2010).

In the context of consumer behavior, country-of-origin (COO) refers to the influence that the country associated with a product—whether through brand, manufacturing, design, or component sourcing—exerts on consumer evaluations and purchase decisions. COO is not a monolithic concept; it encompasses several dimensions such as: Country of Brand

Origin (COBO), i.e., the country with which the brand is primarily associated, Country of Manufacturing (COM), i.e., the country where the product is assembled or manufactured, Country of Design (COD), i.e., the country where a product is designed, and Country of Parts (COP), i.e., the origin of key components or subsystems within the product. These distinctions are particularly salient in the automobile industry, where global supply chains mean that a car may be designed in one country, assembled in another, and contain parts from several others. COO is thus a multidimensional construct, rooted in broader country image factors—political, economic, technological, cultural, and increasingly, ecological and social (Andéhn & L'Espoir Decosta, 2016; El Moussawel & Dekhili, 2019; Fetscherin & Toncar, 2010; Karunaratna et al., 2004; Maheswaran et al., 2013; Pereira et al., 2005; Samiee et al., 2016).

Empirical studies consistently demonstrate that COO significantly influences consumer evaluations, brand equity, and purchase intentions in the automobile industry. For example, surveys in Saudi Arabia and India reveal that COO is a key determinant of automobile purchase decisions, often serving as a proxy for quality and reliability (Sohail & Sahin, 2010). The strength of the association between a brand and its COO moderates these effects, with stronger associations leading to higher brand equity and more pronounced COO effects (Alam et al., 2018; Andéhn & L'Espoir Decosta, 2016).

Consumers are able to differentiate between the COO of automobile components, often ranking German and Japanese parts higher than those from other countries, which influences overall product evaluations (Karunaratna et al., 2004). However, the impact of COO is not uniform; it is moderated by product involvement, consumer knowledge, and the congruence between product and country stereotypes (Josiassen, 2010; R. B. Kim et al., 2016).

In emerging and transitional economies, COO effects are particularly salient. Chinese automobiles, for instance, face negative COO perceptions in European and Southeast Asian markets, being rated lower in quality and attractiveness compared to Japanese or German cars (Holtbrügge & Zeier, 2016; Raditya et al., 2025). However, these perceptions are dynamic: in Uzbekistan, consumer attitudes toward Chinese and local brands have improved over time, suggesting that effective marketing and innovation can shift COO perceptions (Karimov & El-Murad, 2019).

Empirical evidence suggests that COO significantly affects consumer behavior in the automobile industry. For instance, a study conducted in Saudi Arabia found that COO plays a critical role in automobile purchase decisions, indicating that consumers have strong preferences based on the origin of the cars (Sohail & Sahin, 2010). Similarly, research involving visitors to a foreign car exhibition demonstrated that COO and brand image positively influence customers' evaluations of car quality, which in turn affects their perception of the car's overall quality (Rezaei & Ansari, 2022a).

The country of manufacture (COM) can exert a greater influence on the perceived brand personality of a car than the country of branding (COB). For example, a study found that a Chinese car manufactured in the USA was perceived to have a stronger brand personality than a US car made in China, suggesting that COM has a significant impact on brand perceptions (Fetscherin & Toncar, 2010). This finding is crucial for manufacturers aiming to build and protect their brands in international markets.

In summary, the country of origin significantly influences consumer behavior in the automobile industry through various dimensions such as COM, COD, COP, and COBO. Empirical studies consistently show that COO impacts consumer evaluations, brand perceptions, and purchase intentions. Understanding these effects is essential for automobile manufacturers to develop effective marketing strategies and position their brands in global markets.

4.3. Expertise and product category selection

Expertise in the automobile industry is multifaceted, encompassing deep customer understanding, integration of engineering and marketing, strategic partnerships, and supply chain management. From a marketing perspective, expertise is reflected in the manufacturer's ability to anticipate and respond to consumer needs, leverage technological innovation, and build strong brand equity (Helmold et al., 2022; Kuznetsov et al., 2018). This expertise is not limited to technical competence; it also includes the capacity to manage relationships with suppliers, dealers, and consumers, and to adapt to regulatory and market changes.

Marketing theories, particularly those grounded in decision theory and marketing firm theory, provide a robust framework for understanding the influence of manufacturer expertise on consumer behavior. Decision

theory posits that the value of marketing expertise increases with market instability, the profit impact of decisions, and the potential loss from mistakes (Cataltepe et al., 2023; Pasa & Shugan, 1996). In dynamic and competitive markets, manufacturer expertise enables firms to anticipate and respond to fluctuating consumer demands, thereby enhancing firm performance and consumer satisfaction.

Consumer responses to manufacturer expertise are both cognitive and affective. Cognitive responses influence product attitudes and purchase intentions, while affective responses drive emotional commitment and brand loyalty (Hashem et al., 2024; X. G. Li et al., 2011; Mann & Ghuman, 2018; X. Wang & Yang, 2011). Manufacturer expertise shapes brand attitudes, which mediate the relationship between corporate, product, and user image dimensions and purchase intentions. Sales consultant empathy, a form of manufacturer expertise, strongly predicts customer happiness and trust, which mediate brand love and positive behavioral intentions such as willingness to pay more and positive word-of-mouth.

Empirical studies consistently show that manufacturer expertise builds consumer trust, mediates perceived risk, and influences purchase intention, especially for AI-enabled vehicles (Burgese & Cha, 2024; Dang & Erorita, 2025; Waung et al., 2021). Trust in the manufacturer is crucial for consumer acceptance of new technologies, with information about standards, regulations, and research increasing trust in both product performance and the manufacturer. Trust also plays a mediating role between perceived risk and purchase intention, highlighting the importance of manufacturer expertise in reducing uncertainty and fostering consumer confidence.

Recent evidence shows that brand credibility and manufacturer competence are critical for consumer acceptance of AI-enabled automobile technologies (Dorsch & Deroy, 2025; Febrian, 2025; C. Yang & Hu, 2022; Y. Yang & Kim, 2025). Labeling automotive AI as "trustworthy" enhances perceived ease of use and human-like trust, facilitating user acceptance. Consumers prefer AI-enabled services when brand personality aligns with competence, and perceived brand authenticity mediates this effect. However, AI influencer endorsements may reduce brand trustworthiness due to lower mind perception.

Consumer cognitive and affective responses to manufacturer expertise drive brand loyalty and positive post-purchase behaviors (Bloemer & Lemmink, 1992; Hashem et al., 2024; Mann & Ghuman, 2018; Rizvi et al., 2020). Salesperson empathy and customer orientation enhance customer happiness and trust, which mediate brand love and lead to behaviors such as resistance to negative information, positive word-of-mouth, and willingness to pay more. Brand experience positively impacts emotional confidence, satisfaction, and loyalty, with service quality dimensions further supporting customer engagement and brand performance.

Collectively, empirical evidence robustly supports the relationship between manufacturer expertise and consumer behavior. Expertise enhances trust, brand credibility, and purchase intention, with cognitive and affective responses mediating brand loyalty and post-purchase behaviors.

4.4.Credibility and Product Category Selection

In the context of the automobile industry, brand credibility is defined as the extent to which a brand is perceived as trustworthy, expert, and attractive by consumers (Y. Li et al., 2011; Nayeem et al., 2019; X. Wang & Yang, 2010a).

Matching corporate and product brand images, especially those related to emotional value, creates a synergistic effect that significantly increases purchase intention (Kato, 2021). Brand personality appeal—characterized by favorability, originality, and clarity—directly impacts purchase intentions, with sincere brand personalities generally eliciting higher purchase intentions than exciting ones (Freling et al., 2011; Hu & Shi, 2020). These constructs are particularly relevant in the automotive sector, where brand personality and prestige can differentiate brands in a crowded marketplace and enhance the effectiveness of brand credibility signals.

Empirical findings reveal significant cross-country differences in the influence of brand credibility on consumer preferences for imported versus locally assembled vehicles. In emerging Asian markets, brand awareness and brand image strongly moderate the effect of brand credibility on purchase intention, with perceived brand globalness and localness influencing consumer attitudes differently (Pankhania et al., 2007; J. Park et al., 2021; X. Wang & Yang, 2010a; Ye et al., 2025; Zhuang et al., 2008).

For example, in China, brand origin confusion benefits local brands more than foreign brands, with increased consumer brand knowledge reducing this effect (Zhuang et al., 2008). Asian consumers' purchase intentions for foreign brands are influenced by country image and animosity, with positive country image mitigating animosity effects and enhancing brand quality evaluation and purchase intention (J. Park et al., 2021).

In Europe, consumers face difficulties identifying COO for hybrid or globally sourced products and may prioritize brand image over country of origin in purchase decisions²⁵. Within-country ethnic differences, such as between British Indian and Caucasian British consumers, lead to different brand perceptions and attribute importance, highlighting the need for culturally nuanced brand positioning (Pankhania et al., 2007).

Empirical studies consistently demonstrate that brand credibility positively influences consumers' purchase intentions in the automobile industry, both directly and indirectly (Y. Li et al., 2011; Srivastava et al., 2020; X. Wang & Yang, 2010a, 2011). This effect is often moderated by brand awareness and brand image, with credible brands being more likely to be included in consumers' consideration sets and ultimately chosen. In emerging markets, the interplay between globalness, local iconness, and authenticity further shapes the impact of brand credibility on purchase intention.

Brand credibility plays a critical role in reducing perceived risk and information search costs, thereby facilitating consumer decision-making, especially in high-uncertainty or technologically complex automobile markets (Backhaus et al., 2011; Erdem & Swait, 2004; Meng et al., 2024; J. Park et al., 2022; Zou et al., 2024). For example, in the context of electric vehicles and advanced intelligent driving technologies, credible brands are perceived as safer and more reliable, mitigating consumer concerns about product performance and after-sales support.

Beyond purchase intention, brand credibility fosters brand loyalty and positive word-of-mouth, often through the mediating effects of satisfaction, affective commitment, and brand attachment (Ameri & Behnam, 2014; Basu & Sondhi, 2024; Reitsamer & Brunner-Sperdin, 2021; M. B. Rodrigues et al., 2024). Satisfied consumers of credible brands are

more likely to repurchase and recommend the brand to others, amplifying the brand's market presence and reputation.

Brand credibility, which incorporates manufacturer expertise, is a key driver of consumer perceptions and purchase intentions in emerging markets such as China (Y. Li et al., 2011; X. Wang & Yang, 2010b, 2011). Brand awareness and image strengthen the effect of credibility on purchase intention, with corporate-brand credibility having a stronger impact than perceived brand origin. Brand credibility improves decision convenience and affective commitment, serving as a signal of quality, reliability, and reduced risk.

In summary, brand credibility is a cornerstone of effective automobile marketing, serving as both a market signal and a psychological anchor that shapes consumer perceptions, attitudes, and behaviors. Marketers who strategically build and leverage brand credibility are better positioned to drive consumer engagement, loyalty, and advocacy in an increasingly complex and competitive industry.

4.5. Originality and Product Category Selection

Brand originality in the automobile industry refers to the distinctiveness of a brand's identity and personality, which sets it apart from competitors and resonates emotionally with consumers. This construct is not limited to product features or technological innovation; rather, it encompasses the creation of a unique set of brand associations, values, and narratives that are both recognizable and meaningful to consumers. Originality is achieved when a brand is perceived as authentic—true to its heritage and values—and as projecting a singular lifestyle or personality that consumers aspire to or identify with (Burešová & Štůsek, 2017; Chumpitaz et al., 2015; Cini & Farrugia, 2017). In practice, this means that automobile brands must go beyond functional differentiation to create emotionally engaging experiences and symbolic value.

The literature identifies several key dimensions of brand originality. Authenticity is the first dimension which refers to the perception that a brand is genuine, consistent, and true to its stated values and heritage. Authenticity is a strong antecedent of brand image and enhances emotional engagement, such as brand love and satisfaction (Morhart et al., 2013; P. Rodrigues et al., 2022). The second aspect is projection that denotes the brand's ability to reflect or project a consumer's desired lifestyle or

personality. In the automotive context, consumers seek brands that allow them to express their individuality and social identity (Chumpitaz et al., 2015). The last aspect of brand originality is singularity which represents the uniqueness of the brand or model, which differentiates it from competitors and fosters a sense of exclusivity and personal connection (Morhart et al., 2013).

The automobile industry is characterized by intense competition, technological convergence, and a proliferation of brands vying for consumer attention. In this saturated environment, traditional differentiators such as technical specifications and price are often insufficient to secure lasting consumer loyalty. Instead, brands increasingly rely on originality—manifested through unique identity, emotional resonance, and authentic storytelling—to distinguish themselves and foster deep consumer relationships. The growing importance of brand originality is underscored by shifting consumer expectations, the rise of digital engagement, and the need for brands to project values and lifestyles that align with diverse consumer self-concepts (M. S. Kumar et al., 2016; Long et al., 2019; Wu et al., 2024). Understanding how brand originality shapes consumer behavior is thus a central concern for marketers seeking to build sustainable competitive advantage in the automotive sector.

Empirical studies show that these dimensions collectively influence consumer emotional engagement, self-congruence, and perceived brand identity, which in turn drive purchase intentions and loyalty (Mesfar & Ltifi, 2022; Murshed et al., 2023; Yao et al., 2015). Notably, the impact of each dimension may vary across market segments and consumer demographics, with authenticity and projection often exerting the strongest effects on emotional attachment and buying intentions.

Integrated Marketing Communication (IMC) is critical in reinforcing brand originality and ensuring consistent consumer perceptions across global markets. IMC involves the strategic coordination of all marketing communication tools—advertising, public relations, digital content, and experiential marketing—to deliver a unified and coherent brand message. Consistency in messaging builds trust, enhances brand equity, and strengthens the unique brand personality that consumers associate with originality (Orazi et al., 2017; Šerić et al., 2020; S.-P. Tsai, 2005). Research indicates that IMC not only improves brand awareness and image but also

mediates the relationship between brand originality and consumer loyalty, particularly in luxury and global automotive markets.

Empirical research demonstrates that brand originality significantly influences consumer purchasing decisions, brand loyalty, and engagement in the automobile industry. Key determinants of loyalty include product quality, service quality, price fairness, brand image, and perceived value, all of which are enhanced by perceptions of originality and authenticity (Chumpitaz et al., 2015; M. S. Kumar et al., 2016; Long et al., 2019; Murshed et al., 2023; Rixom & Rixom, 2023; Vishnoi et al., 2023). Studies show that originality not only differentiates brands in crowded markets but also fosters emotional attachment and trust, which are critical for long-term loyalty.

Several studies have explored the impact of brand originality on consumer behavior in the automobile industry. One study found that brand experience significantly influences perceived brand authenticity, which in turn affects consumer loyalty intentions (Murshed et al., 2023). This suggests that a unique and authentic brand experience can enhance consumer loyalty, highlighting the importance of brand originality.

Another study demonstrated that brand attachment, which can be fostered through unique and original brand attributes, leads to various positive consumer behaviors such as product modification and loyalty (S. Park et al., 2016). This indicates that consumers who perceive a brand as original and unique are more likely to develop a strong attachment to it, resulting in increased loyalty and engagement.

Additionally, the influence of brand name and its originality on consumer behavior has been highlighted, with findings suggesting that a well-established and unique brand name can significantly impact car sales and market share consistency (Palaniraj & Govindaraju, 2018). This further supports the notion that brand originality plays a crucial role in shaping consumer preferences and purchasing decisions.

In summary, brand originality in the automobile industry significantly affects consumer behavior by enhancing brand authenticity, credibility, and attachment. These factors collectively contribute to positive consumer outcomes such as increased loyalty, engagement, and purchasing intent. Therefore, automobile brands should focus on creating and

maintaining a unique and original brand identity to effectively influence consumer behavior and achieve long-term success in the market.

4.6. After-sale services and product category selection

In the contemporary automobile industry, after-sale services have emerged as a critical determinant of consumer behavior and a key source of competitive advantage. As product differentiation narrows and market competition intensifies, manufacturers and dealers increasingly rely on the quality and breadth of after-sale services to foster customer satisfaction, loyalty, and long-term profitability (Carrillat et al., 2009; Yadav & Joseph, 2017). The strategic importance of after-sale services is underscored by their direct impact on customer perceptions, repurchase intentions, and word-of-mouth advocacy, making them a central focus for marketing scholars and practitioners alike.

After-sale services in the automobile industry encompass a suite of activities and support mechanisms provided to customers following the purchase of a vehicle. These include warranty management, technical assistance, spare parts procurement and distribution, routine maintenance, customer care, and complaint resolution (Durugbo, 2020; Inderfurth & Kleber, 2013; Katsardis, 2024; Titu et al., 2025; Yadav & Joseph, 2017). The operationalization of after-sale services extends to the management of service networks, optimization of repair times and costs, and the integration of customer feedback into continuous improvement processes. The literature consistently identifies five core service quality dimensions—tangibility, reliability, assurance, responsiveness, and empathy—as central to evaluating after-sale service performance (Durugbo, 2020; Yadav & Joseph, 2017). These dimensions are not only critical for customer satisfaction but also serve as benchmarks for competitive differentiation and revenue generation in the automotive sector (Rangraz Jeddi et al., 2013).

The quality and effectiveness of after-sale services significantly impact consumer behavior in the automobile industry. High-quality after-sale services can enhance customer satisfaction, leading to increased customer loyalty and repeat purchases. For instance, studies have shown that customer service is a critical dimension of service quality that positively influences customer loyalty in the automotive sector (Saidin, Mokhtar, et al., 2018). Additionally, the brand image, which is often

reinforced through consistent and reliable after-sale services, plays a crucial role in maintaining customer loyalty (Septiano et al., 2025).

Several studies provide empirical evidence supporting the relationship between after-sale services and consumer behavior. For example, research conducted on Malaysian national carmakers revealed that customer service is the most important dimension of service quality contributing to customer loyalty (Saidin, Mokhtar, et al., 2018). This indicates that customers who are satisfied with the after-sale services are more likely to remain loyal to the brand and make repeat purchases.

Moreover, the quality of after-sale services provided by dealers has been shown to influence the sales performance of automobile manufacturers. A study analyzing U.S. automobile dealerships found that high-quality after-sale services positively impact the sales of the brand in the dealer's region, highlighting the importance of maintaining high service standards (Golara et al., 2021). This is further supported by findings that dealerships with the best after-sales customer satisfaction levels also achieve the highest revenue per serviced car (Borchardt et al., 2018).

Empirical evidence consistently demonstrates that high-quality after-sale services significantly enhance customer satisfaction, which in turn drives loyalty, repurchase intentions, and positive word-of-mouth (Boisvert & Khan, 2023; Carrillat et al., 2009; Javed & Wu, 2020; Rigopoulou et al., 2008; Saidin, Mokhtar, et al., 2018; Yi & La, 2004). For example, studies in the Indian two-wheeler market reveal that after-sales service quality has a stronger impact on brand equity and repurchase intentions than product quality, with satisfaction serving as a key mediator (Budhiraja & Mittal, 2025; Nasir et al., 2021). Similar patterns are observed in other markets, where integrated service touchpoints (e.g., dealership, call center, online booking) amplify the effects of service quality on customer retention and advocacy (Boisvert & Khan, 2023).

Empirical research consistently demonstrates that after-sale service quality is a primary driver of customer loyalty in the automotive sector. In Malaysia, for example, studies show that customer service and relationship quality are the most influential dimensions of after-sale service, significantly enhancing loyalty to national carmakers even in the face of attractive alternatives from competitors (Saidin, Mokhtar, et al., 2018; Saidin, Rahman, et al., 2018). This effect is not limited to local brands;

imported brands also benefit from high service quality, but the impact is often mediated by brand image and consumer perceptions of reliability and prestige. Notably, customer satisfaction acts as a key mediator in this relationship, translating service quality improvements into tangible loyalty outcomes (Ashfaq, 2019; Saidin, Rahman, et al., 2018). In competitive markets, poor after-sale service quality can erode market share, even for brands with strong reputations, underscoring the strategic importance of post-purchase support (Golara et al., 2021).

Recent studies across India, China, Thailand, and other emerging markets confirm the positive relationship between after-sale service quality and consumer outcomes, while also highlighting the mediating roles of satisfaction and loyalty (Budhiraja & Mittal, 2025; Lapyen & Darawong, 2025; Nasir et al., 2021). Notably, in the electric vehicle (EV) segment, service quality dimensions such as reliability, responsiveness, and empathy are found to be critical predictors of continuance and recommendation intentions, although overall satisfaction levels remain lower than in traditional vehicle markets (Jabbari et al., 2017; Lapyen & Darawong, 2025).

Several critical factors influence the effectiveness of after-sale services in driving consumer behavior. These include the technical competence of service personnel, the efficiency of service operations, and the overall customer experience. For instance, the proficiency of technicians and their ability to communicate effectively with customers are key factors in enhancing customer satisfaction and loyalty (Han & Ha, 2025). Additionally, the implementation of advanced technologies, such as machine learning for predicting maintenance needs, can improve service efficiency and customer satisfaction (Yıldırım et al., 2025).

The integration of technological innovations, particularly Internet of Things- (IoT-) based solutions and digital service platforms, is reshaping after-sale service delivery and consumer expectations. Empirical evidence from Indonesia and other emerging markets indicates that IoT-enabled after-sale services—such as real-time vehicle monitoring, predictive maintenance, and digital communication—significantly enhance customer satisfaction and repurchase intentions (Dominici et al., 2016; Ekasari et al., 2023; Saidin, Mokhtar, et al., 2018). These technologies not only improve operational efficiency but also enable more personalized and proactive service experiences, which are highly valued by consumers. However, the

adoption and impact of these innovations can vary by market and brand origin, with local brands often leveraging digitalization to overcome resource constraints and imported brands using technology to reinforce perceptions of quality and innovation.

Operational factors such as service cost and repair time are also significant determinants of consumer satisfaction and future purchase intentions. Quantitative analyses reveal that reducing service costs and repair times can increase customer satisfaction by up to 5%, which in turn drives higher sales and profitability (Soltani et al., 2023). These factors are particularly salient in emerging markets, where price sensitivity is high and consumers often weigh the long-term costs of ownership—including maintenance and repair—when choosing between imported and locally assembled vehicles. Empirical evidence from India and other markets indicates that satisfaction with maintenance costs and repair efficiency is a key predictor of repeat purchase intentions, highlighting the need for brands to optimize their after-sale service operations to remain competitive (Soltani et al., 2023).

Integrated marketing theories that combine product and service quality offer a comprehensive perspective on consumer loyalty in the automobile sector. These models highlight the mediating roles of customer satisfaction, relationship quality, and brand equity in translating quality commitment into favorable behavioral intentions. Empirical evidence suggests that while product quality is a fundamental driver of satisfaction and loyalty, service quality—particularly after-sales support—can compensate for lower product quality and strengthen consumer relationships in competitive markets (Bei & Chiao, 2006; Budhiraja & Mittal, 2025; Chao et al., 2007; Devaraj et al., 2001).

Empirical studies highlight the effectiveness of specific after-sale service strategies—such as warranty management, service scheduling, and process optimization—in enhancing customer satisfaction and loyalty. For example, research on Malaysian national carmakers and other Asian brands shows that continuous improvement in warranty and stock management, efficient service scheduling, and the provision of customer bonuses are associated with higher customer satisfaction and revenue (Al-Shaikh et al., 2024; González, 2015; Rangraz Jeddi et al., 2013; Titu et al., 2025). Process optimization, including the allocation of service resources and improved communication, further contributes to operational efficiency and

customer satisfaction (Rangraz Jeddi et al., 2013; Titu et al., 2025). Notably, contractual retention strategies such as warranty validity and service contracts have been found to exert a greater influence on customer loyalty than perceived service quality alone, particularly in the context of imported vehicles where service accessibility may be a concern (González, 2015).

Dealer after-sales service quality is a critical determinant of brand sales and market share, especially in highly competitive markets. Manufacturers whose dealers provide superior after-sales services experience increased market share and customer loyalty, while poor service quality leads to declines in competitive advantage. Original Equipment Manufacturer (OEM) franchise workshops are investing heavily in after-sales service markets, recognizing the strategic value of service excellence in sustaining profitability and market position (Golara et al., 2021; Tsui, 2021).

The strategic management of after-sale services has profound implications for automobile manufacturers, dealers, and marketers. High-quality after-sales not only drive customer satisfaction and loyalty but also generate substantial revenue streams and competitive differentiation (Carrillat et al., 2009; Rangraz Jeddi et al., 2013). The integration of digital platforms, predictive analytics, and multichannel service delivery is increasingly essential for meeting evolving customer expectations and sustaining long-term relationships (Dombrowski & Fochler, 2018; Naru et al., 2024). Moreover, the adaptation of service quality models to local cultural contexts is critical for global market success, particularly in emerging and EV markets where traditional paradigms may not suffice (Gencer & Akkucuk, 2017; Lapyen & Darawong, 2025). Marketers must therefore invest in both operational excellence and relationship-building capabilities, leveraging technology and cultural insights to deliver superior after-sale experiences.

While technological innovation in after-sale services is generally associated with higher customer satisfaction and loyalty, empirical evidence on differential effects for imported versus locally assembled vehicles remains limited and somewhat inconclusive (Aradhya S et al., 2024; Ekasari et al., 2023; Saidin, Mokhtar, et al., 2018). Some studies suggest that imported brands may have an advantage in deploying advanced service technologies due to greater resources and global

expertise, but local brands can achieve parity—or even superiority—by tailoring digital solutions to local consumer needs and service contexts. The competitive dynamics in this area are evolving rapidly, with both local and imported brands investing heavily in digital transformation to capture and retain market share.

The quality of the relationship between the service provider and the customer is a critical determinant of repeat purchase intentions and positive word-of-mouth. Empirical evidence indicates that relationship quality in after-sale service has a stronger effect on customer loyalty than the attractiveness of alternative service providers, especially for local brands (Nasir et al., 2021; Natalia & Syevillia, 2018; Saidin, Rahman, et al., 2018). For imported brands, brand image and satisfaction with the car itself may play a more significant role, but after-sale service quality remains a key driver of dealer loyalty and, by extension, brand loyalty (Natalia & Syevillia, 2018). These findings suggest that investment in relationship-building and personalized service can yield substantial returns in terms of customer retention and advocacy.

In summary, after-sale service quality is not merely a support function but a strategic marketing lever that shapes consumer preferences, loyalty, and product category selection in the global automotive industry. Its importance will only grow as markets evolve and consumer expectations continue to rise.

4.7.Consumer ethnocentrism and product category selection

Consumer ethnocentrism, in the context of the automobile industry, refers to the predisposition of consumers to evaluate and prefer domestic vehicles over foreign alternatives, often driven by affective (emotional), cognitive (belief-based), and behavioral (action-oriented) dimensions. This construct is not merely a reflection of product preference but is deeply intertwined with consumers' sense of national identity, moral obligation, and perceived economic impact of their purchasing choices (Bawa, 2004; Čutura, 2012; De Ruyter et al., 1998; Story & Godwin, 2023). In practice, ethnocentric consumers may express a reluctance to purchase foreign automobiles, perceiving such actions as unpatriotic or economically detrimental to their home country. Notably, in the automobile sector, consumers often rely on the perceived country of the brand rather than the actual country of origin, highlighting the symbolic role of national identity

in shaping vehicle preferences and purchase intentions (Story & Godwin, 2023).

The theoretical landscape of consumer ethnocentrism in automobile purchasing is anchored in several foundational models. Shimp & Sharma (1987) consumer ethnocentrism model conceptualizes ethnocentrism as a set of beliefs regarding the morality and appropriateness of purchasing foreign goods, which has been widely applied to understand country-of-origin effects and purchase decisions (Javalgi et al., 2005; Prince et al., 2019; Vermillion et al., 2015).

Empirical studies consistently demonstrate that consumer ethnocentrism positively influences attitudes toward domestic automobile brands and increases willingness to buy domestically produced vehicles (Brodowsky et al., 2004; Guo & Zhou, 2017; McLain & Sternquist, 1992; Siamagka & Balabanis, 2015; Story & Godwin, 2023). However, this effect is often mediated by perceptions of brand country rather than the actual country of origin, reflecting the symbolic power of national identity in consumer decision-making. In emerging markets, ethnocentrism is more pronounced and directly translates into purchase intentions, driven by national pride and perceived superiority of local products. In contrast, consumers in developed markets may exhibit ethnocentric attitudes but are more likely to prioritize brand image, quality, and self-expressive values in their actual purchase decisions.

While ethnocentric consumers express strong preferences for domestic automobiles, their actual purchase behavior does not always align with these stated intentions (Andéhn & L'Espoir Decosta, 2016; Brodowsky, 1998; McLain & Sternquist, 1992; Sharma, 2011; Story & Godwin, 2023; Yagci, 2001). This gap is particularly evident in developed markets, where consumers may lack knowledge of the actual manufacturing location of vehicles and rely instead on brand country cues. In emerging markets, the gap is narrower, as ethnocentric and patriotic sentiments more directly influence purchasing decisions, especially when reinforced by socio-demographic factors such as age, gender, and income.

Moreover, the influence of consumer ethnocentrism on automobile purchase decisions is not uniform across all product categories. Research indicates that while ethnocentrism strongly affects the purchase of consumable products, its impact on durable goods like automobiles can be

more complex. For example, Russian consumers exhibit a strong domestic bias for consumables but show a preference for imported durables, suggesting that product characteristics may sometimes outweigh ethnocentric tendencies (Thelen et al., 2006). This complexity is further highlighted in studies showing that consumer attitudes towards foreign brands can sometimes dominate ethnocentric inclinations, especially when the perceived quality and technical specifications of foreign automobiles are superior (Thomas et al., 2020).

Cross-cultural studies also reveal that the relationship between consumer ethnocentrism and automobile purchase behavior varies by country. For instance, American consumers are generally more ethnocentric compared to their Chinese and South Korean counterparts, and this ethnocentrism translates into a stronger preference for domestic automobiles (W. S. Tsai et al., 2013). However, in some cases, even highly ethnocentric consumers may prefer imported automobiles if they perceive them to be of higher quality or better suited to their needs (Javalgi et al., 2005).

Ethnocentric advertising strategies—those that emphasize national pride, economic protectionism, or social identity—have been shown to effectively increase preference for domestic automobiles, especially in developing markets (Bawa, 2004; R. Lee et al., 2010). Comparative advertising, where foreign brands highlight domestic competitors, can paradoxically trigger ethnocentric responses that benefit domestic brands (Neese & Haynie, 2015). However, the effectiveness of such strategies is contingent upon market context, product involvement, and consumer perceptions of domestic product quality (Hin et al., 2013; Saffu & Scott, 2009).

Consumer ethnocentrism does not operate in isolation; it interacts with related constructs such as patriotism, animosity, and cosmopolitanism to shape automobile purchase intentions. Patriotic values and animosity toward specific countries can amplify ethnocentric preferences for domestic vehicles and reduce willingness to purchase imports from perceived adversaries (Fernández-Ferrín et al., 2015; Goel et al., 2025; Mainolfi, 2022). Conversely, cosmopolitan consumers—those who identify with global rather than national values—are more likely to favor imported automobiles, with product image and perceived quality mediating these effects (Gantulga & Ganbold, 2022; Sousa et al., 2019; Srivastava et al.,

2023). The interplay of these constructs underscores the complexity of consumer decision-making in the automobile sector and highlights the need for integrated marketing strategies that account for both ethnocentric and cosmopolitan segments.

In sum, consumer ethnocentrism remains a critical, multifaceted driver of automobile consumer behavior, demanding sophisticated theoretical, empirical, and strategic responses from marketers and researchers alike.

4.8. The role of consumer price sensitivity

In the context of automobile marketing, price sensitivity is defined as the degree to which consumers' purchase decisions are influenced by changes in price. It reflects both economic constraints and psychological processes, encompassing how consumers perceive, evaluate, and respond to price information relative to perceived quality and value (Slaba, 2020).

4.8.1. The moderating role of price sensitivity on the relationship between quality commitment and product category selection

Empirical studies consistently show that price sensitivity moderates the impact of manufacturer quality commitment on consumer purchase decisions. High-quality producers tend to sell more units but do not always charge higher prices, especially under conditions of quality uncertainty (Krishnamurthi & Papatla, 2003; Metrick & Zeckhauser, 1998; Ramirez & Goldsmith, 2009; Steenkamp, 1988). Price is generally a weak signal of quality, with its effectiveness varying across product types and economic conditions. Brand loyalty is associated with lower price sensitivity and higher willingness to pay, but this relationship is heterogeneous and dynamic, influenced by deal-proneness and product category specifics (Jørgensen et al., 2016; Krishnamurthi & Papatla, 2003; Laradi et al., 2024; Yoon & Tran, 2011).

Consumer loyalty is a critical moderator of price sensitivity, with loyal consumers generally exhibiting lower sensitivity and higher willingness to pay (Ramirez & Goldsmith, 2009; Sayman & Hoch, 2014; Vishnoi et al., 2023; Yoon & Tran, 2011). Loyalty programs, customer satisfaction, and service quality are key antecedents of loyalty, which mediates the relationship between perceived quality and purchase intentions. The distinction between attitudinal and behavioral loyalty is

important, as attitudinal loyalty (positive attitudes toward the brand) leads to higher price acceptance, while behavioral loyalty (repeat purchases) drives market share.

Empirical findings on the price-quality relationship are often contradictory. While consumers may believe that higher prices signal higher quality, actual correlations between price and objective quality are weak or context-dependent (Hanf & von Wersebe, 1994; Jones & Hudson, 1996; J.-Y. Kim & Berg, 2017; Völckner & Hofmann, 2007). Dynamic market models suggest that high-quality producers may lower prices due to cost reductions from scale, reversing traditional price-quality signals. Price sensitivity further moderates this relationship, with more sensitive consumers relying differently on price cues depending on market efficiency and risk aversion.

In summary, empirical evidence supports the moderating effect of price sensitivity on the relationship between a manufacturer's quality commitment and consumer behavior in the automotive sector. Consumers' price sensitivity influences their perceived value and willingness to pay, which in turn affects their preference for either imported or locally assembled automobiles. This relationship is evident in various studies that highlight the interplay between price, quality, and consumer purchase intentions (Ahmad et al., 2017; Fu et al., 2021; N. Kumar et al., 2010; Weng et al., 2023).

4.8.2. The moderating role of price sensitivity on the relationship between country-of-origin and product category selection

Globalization has blurred traditional boundaries in the automobile sector, with brands often manufacturing and sourcing components from multiple countries. This complexity has heightened the importance of COO as a signal of quality and reliability, but it has also made consumers more price conscious, especially in emerging markets where economic constraints are more pronounced. Marketers must navigate these dual influences to effectively position their products, segment their markets, and communicate value. Understanding how price sensitivity moderates the impact of COO on consumer behavior is thus essential for developing robust marketing strategies that resonate across diverse consumer segments (Crespo et al., 2025; S. Kumar et al., 2012; H. Lee et al., 1993).

Behavioral differences in COO and price sensitivity trade-offs are evident between elite and mass-market automobile buyers, particularly in emerging economies. Elite consumers tend to prioritize brand image and symbolic values linked to favorable COO, while mass-market consumers display greater price sensitivity and may compromise on COO advantages when lower prices are available. Product hedonism further moderates COO effects on consumer price sensitivity and quality perception, with Western COO positively affecting perceived product quality and price for hedonic products (Chen & Zhong, 2024; Kinawy, 2025; Rodrigo et al., 2023; S. Wang et al., 2023).

Historical and socio-political factors also influence COO preferences, with negative events reducing preference for certain foreign brands, especially among buyers of higher-priced and larger vehicles. Elite buyers rely more on brand image and symbolic values, while mass-market consumers are influenced by functional attributes and domestic bias (Kinawy, 2025; Rodrigo et al., 2023).

COO and brand national affiliation exert significant influence on consumer perceptions, preferences, and price sensitivity in the automobile market. Empirical studies reveal that consumers do not treat all imports uniformly; preferences for U.S., European, and Japanese vehicles differ markedly, shaped by perceptions of quality, innovation, and brand reputation (Chen & Zhong, 2024; Laskey & Seaton, 2015; McCarthy & Tay, 1989; Weng et al., 2023). In Southeast Asia and other emerging markets, local brands such as Malaysia's Proton and Perodua benefit from positive COO effects, value consciousness, and price-quality associations, which enhance consumer attitudes and purchase intentions toward locally assembled vehicles (Weng et al., 2023). Conversely, imported vehicles may be perceived as higher quality but face greater price sensitivity and potential animosity due to historical or cultural factors (Chen & Zhong, 2024; Rezaei & Ansari, 2022b).

In a conclusion, while direct empirical evidence on the moderating effect of price sensitivity on the relationship between COO and consumer behavior in the automobile industry is limited, related studies suggest that price sensitivity is a significant factor. Consumers who are more price-sensitive may place greater emphasis on the price-quality ratio, potentially diminishing the impact of COO on their purchase decisions. This highlights

the need for further research to explicitly examine this moderating effect in the context of the automobile industry.

4.8.3. The moderating role of price sensitivity on the relationship between expertise and product category selection

Empirical studies consistently demonstrate that price sensitivity moderates the impact of manufacturer expertise on consumer behavior. For consumers with high price sensitivity, the perceived value of manufacturer expertise may be overshadowed by cost considerations, reducing the effectiveness of expertise-driven marketing and branding efforts (Krishnamurthi & Papatla, 2003; Silva-Risso et al., 2008; Yoon & Tran, 2011). Conversely, consumers with lower price sensitivity are more likely to respond positively to signals of manufacturer expertise, such as technological innovation or superior quality, translating into higher brand loyalty and willingness to pay premium prices. Manufacturers often employ price customization and incentive programs to navigate these dynamics, but the success of such strategies is contingent on accurately assessing and segmenting consumer price sensitivity (Silva-Risso et al., 2008).

Furthermore, empirical evidence suggests that price sensitivity plays a crucial role in consumer behavior and can moderate the relationship between manufacturer expertise and consumer behavior. For instance, research indicates that consumer price sensitivity is influenced by various factors such as product involvement, brand loyalty, and perceived brand parity (Ramirez & Goldsmith, 2009). High levels of brand loyalty and product involvement tend to reduce price sensitivity, suggesting that consumers who are more loyal to a brand or more involved with a product category are less likely to be influenced by price changes.

Moreover, the literature highlights that price sensitivity varies across different consumer segments. For example, consumers with high price sensitivity are more likely to switch brands in response to price changes, while those with low price sensitivity are less likely to do so (H. Yang & Wang, 2020; Yoon & Tran, 2011). This segmentation is crucial for manufacturers in the automobile industry, as it allows them to tailor their pricing strategies to different consumer groups.

In conclusion, the moderating effect of price sensitivity on the relationship between manufacturer expertise and consumer behavior is well-supported by empirical evidence. Manufacturers need to consider the

varying levels of price sensitivity among consumers and how it interacts with their expertise to influence purchasing decisions. By doing so, they can develop more effective marketing strategies that cater to the diverse needs and preferences of their target market.

4.8.4. The moderating role of price sensitivity on the relationship credibility and product category selection

Empirical studies reveal that price sensitivity moderates the relationship between brand credibility and purchase intention primarily through mediators like perceived value and price fairness (Hamzah & Pontes, 2024). When consumers are highly price-sensitive, the positive effects of brand credibility on purchase intention are attenuated unless the brand is also perceived as offering fair pricing and superior value. For example, in the case of rejuvenated or struggling automobile brands, perceived price fairness is a critical mediator that can either reinforce or undermine the credibility–intention link (Hamzah & Pontes, 2024). This dynamic is particularly pronounced in markets where consumers have access to both imported and locally assembled options, as price comparisons become more salient and can override brand-based preferences.

The strength of price sensitivity's moderating effect is not uniform across all consumers. Brand loyalty, involvement, and deal-proneness significantly influence how price sensitivity interacts with brand credibility (Joji Alex & Thomas, 2014; Yoon & Tran, 2011). Loyal consumers or those with high brand involvement tend to exhibit lower price sensitivity, allowing brand credibility to exert a stronger influence on purchase decisions. In contrast, consumers with low involvement or high deal-proneness are more likely to prioritize price over brand attributes, diminishing the impact of credibility (Yoon & Tran, 2011). This heterogeneity underscores the need for segmentation strategies in automotive marketing, as the effectiveness of brand-building efforts will vary across consumer segments.

The evidence presented in this section suggests that price sensitivity can indeed moderate the relationship between brand credibility and consumer behavior in the automobile industry, with less price-sensitive consumers being more influenced by brand credibility, particularly in the

context of premium imported automobiles. Conversely, more price-sensitive consumers may prioritize cost over brand credibility, favoring locally assembled vehicles. This dynamic highlights the importance of understanding consumer segments and their varying responses to price and brand credibility in the automobile market.

4.8.5. The moderating role of price sensitivity on the relationship between originality and product category selection

A growing body of empirical research directly examines how price sensitivity moderates the relationship between brand originality and consumer behavior in the automobile industry. Studies consistently find that lower price sensitivity amplifies the positive effects of brand originality on perceived value and purchase intention (Hamzah & Pontes, 2024; Laradi et al., 2024; Miller & Brannon, 2022). For instance, consumers with strong brand loyalty or high innovativeness are less price sensitive and more likely to appreciate and pay for originality, even at premium prices. Conversely, highly price-sensitive consumers are less influenced by originality unless price fairness is perceived, indicating a clear moderation effect (Hamzah & Pontes, 2024).

Additionally, the concept of price sensitivity is evolving. Traditional views that price sensitivity leads to brand switching and lower repurchase rates are being challenged by new consumer behaviors. For example, hybrid consumers now evaluate the price they are willing to pay based on perceived value, which includes factors like brand originality and quality (Valls et al., 2012). This shift indicates that consumers are not solely driven by low prices but also by the value and uniqueness offered by the brand.

In sum, the relationship between brand originality and consumer behavior in the automobile industry is robust but highly contingent on price sensitivity. Marketers must recognize that originality alone is not a panacea; its effectiveness depends on the price sensitivity profile of the target segment. That is, price sensitivity moderates the relationship between brand originality and consumer behavior in the automobile industry by influencing how consumers perceive and respond to price changes. Loyal consumers tend to be less price-sensitive, valuing brand originality and quality over cost. This dynamic highlights the importance for automobile brands to focus on maintaining originality and building strong brand loyalty to mitigate the impact of price sensitivity on consumer behavior.

4.8.6. The moderating role of price sensitivity on the relationship between after-sale services and product category selection

Empirical studies confirm that price sensitivity significantly moderates the impact of after-sales service quality on consumer loyalty and repurchase intention (Graciola et al., 2018; Guajardo et al., 2016; Jørgensen et al., 2016; Rizzon et al., 2023; Umashankar et al., 2017). High-quality after-sales service enhances loyalty and repurchase intention, but these effects are more pronounced among consumers with lower price sensitivity. For highly price-sensitive consumers, even marginal price increases can negate the benefits of superior service, leading to increased switching or reduced repurchase rates (Jørgensen et al., 2016; Umashankar et al., 2017). Conversely, improvements in service quality can reduce perceived price risks and foster greater price tolerance, especially among less price-sensitive segments (Guajardo et al., 2016).

Customer satisfaction with after-sales services is a key mechanism through which service quality influences price sensitivity and subsequent behavior (Aslam & Farhat, 2020; Leong et al., 2024; Nambiar & Krishnan, 2025; Saidin, Rahman, et al., 2018; Soltani et al., 2023; Yun & Hanson, 2020). Satisfied customers are more likely to tolerate price increases and exhibit higher loyalty, while dissatisfied customers become more price-sensitive and prone to switching. In competitive markets, the interplay between satisfaction, price sensitivity, and loyalty becomes even more critical, as consumers have greater access to alternatives (Leong et al., 2024; Saidin, Rahman, et al., 2018).

The moderating effect of price sensitivity is not uniform across all contexts. In markets characterized by high relational quality or product quality, the influence of price sensitivity on the service–loyalty link may be neutralized (Guajardo et al., 2016; Saidin, Mokhtar, et al., 2018; Saidin, Rahman, et al., 2018; Yoon & Tran, 2011). For example, in the Malaysian national carmaker market, alternative attractiveness does not significantly affect loyalty when relationship quality is high (Saidin, Rahman, et al., 2018).

Moreover, service quality attributes, such as warranty length and after-sales service, interact with price sensitivity to influence consumer satisfaction, retention, and purchase intentions (Dlamini et al., 2024; Jiang & Rosenbloom, 2005; Rajaguru, 2016; X.-L. Wang et al., 2024). Favorable

service quality can compensate for higher prices, enhancing perceived value and reducing price sensitivity. Extended warranties and after-sales service are particularly important in durable goods markets like automobiles, where post-purchase experiences shape long-term loyalty and price tolerance.

Empirical evidence suggests that after-sale services, such as warranty length and service quality, significantly impact consumer demand and loyalty in the automobile industry. For instance, one study found that the willingness to pay for an additional year of warranty is substantial, indicating that consumers value after-sale services highly (Guajardo et al., 2016). This value, however, can be moderated by the consumers' sensitivity to price changes. When consumers are highly price-sensitive, the perceived value of after-sale services may diminish, as these consumers prioritize lower prices over additional services (Abdullahu & Fejza, 2020).

Finally, In the automotive industry, the competitive landscape also plays a role. The presence of alternative service providers and competitive pricing can influence consumer loyalty and their sensitivity to price changes 5. For example, in markets with fierce competition, consumers may exhibit higher price sensitivity, thereby reducing the impact of after-sale services on their purchasing decisions.

In sum, the literature unequivocally demonstrates that after-sales service quality is a pivotal driver of consumer satisfaction, loyalty, and repurchase intention in the automobile industry. However, the magnitude of these effects is significantly moderated by consumer price sensitivity. High-quality service can offset adverse price perceptions among less price-sensitive consumers and, in turn, reduce perceived risks among price-sensitive segments. Brand image and market context further complicate this relationship.

4.8.7. The moderating role of price sensitivity on the relationship between consumer ethnocentrism and product category selection

Recent studies provide robust evidence that price sensitivity moderates the relationship between consumer ethnocentrism and automobile purchase intentions. Ethnocentric consumers are generally

willing to pay a premium for domestic brands, but high price sensitivity—especially among lower-income or older segments—can weaken this preference, reducing willingness to pay even for favored domestic products (Slaba, 2020; Story & Godwin, 2023; Toukabri & Gharbi, 2022; Zaborek & Nowakowska, 2024). This moderating effect is observed across product categories, with price remaining a critical factor for price-sensitive consumers regardless of ethnocentric or ethical considerations (Akbarov, 2022; Goel et al., 2025).

Demographic variables—age, gender, income, family size—significantly influence both ethnocentrism and price sensitivity. Females tend to be slightly more price-sensitive than males, and gender moderates the relationship between ethnocentrism and willingness to buy (Aguilar-Rodríguez et al., 2025; Akbarov, 2022; Gao et al., 2020; Josiassen et al., 2011). Lower-income consumers exhibit stronger ethnocentric tendencies but are also more price-sensitive, affecting their purchasing decisions in the automobile sector (Akbarov, 2022; Erdogan & Uzkuurt, 2010; Josiassen et al., 2011; Lesáková, 2016; Slaba, 2020). Larger households and less-educated consumers are also more price-sensitive and ethnocentric (Shukla et al., 2013; Slaba, 2020).

The moderating role of price sensitivity differs between domestic and foreign automobile brands. Ethnocentric consumers prefer domestic products even at higher prices, but price sensitivity can weaken this preference, especially when price premiums are perceived as excessive (Siamagka & Balabanis, 2015; Story & Godwin, 2023; Yen, 2018). Comparative advertising and brand positioning strategies can influence ethnocentric reactions and purchase intentions, with ethnocentrism strengthening the preference for domestic brands but also increasing price sensitivity's negative impact on willingness to buy (Neese & Haynie, 2015; Othman et al., 2008).

Consumer ethnocentrism and price sensitivity independently influence perceptions, attitudes, and purchase intentions in the automobile sector. Ethnocentrism drives positive evaluations of domestic brands and negative judgments of foreign products, while price sensitivity directly affects willingness to pay and purchase decisions (Akbarov, 2022; Guo & Zhou, 2017; Story & Godwin, 2023).

The interaction between ethnocentrism and price sensitivity shapes perceived quality, brand image, and willingness to pay for automobiles. Ethnocentrism enhances the positive effects of perceived quality and brand image on willingness to buy domestic products but may amplify the negative impact of high price, especially in developing countries (Danes & Lindsey-Mullikin, 2012; Guo & Zhou, 2017; Hamzah & Pontes, 2024; Kwanho et al., 2012; Laradi et al., 2024; Yen, 2018). Brand attachment and loyalty mediate the effect of brand strength on willingness to pay, with price fairness and perceived value further influencing purchase intentions.

Empirical evidence suggests that consumer ethnocentrism positively influences the willingness to buy domestic products, but this relationship can be moderated by several factors, including price sensitivity. For instance, in developing countries, consumer ethnocentrism increases the positive effects of perceived quality and brand image on the willingness to buy domestic products, while it may amplify the negative effect of perceived price (Yen, 2018). This indicates that highly ethnocentric consumers might still be deterred by high prices, suggesting that price sensitivity can weaken the otherwise strong preference for domestic products driven by ethnocentrism.

In the context of the automobile industry, brand sensitivity also plays a crucial role. Ethnocentric consumers may prefer domestic brands, but if these brands are priced significantly higher than foreign alternatives, their price sensitivity could override their ethnocentric tendencies (Wei, 2008). This is particularly relevant in markets where domestic brands are perceived to be of lower quality or less prestigious than foreign brands, leading to a weaker impact of ethnocentrism on purchasing behavior when price sensitivity is high (C. L. Wang & Chen, 2004).

In summary, the literature reveals that consumer ethnocentrism is a powerful driver of automobile purchase behavior, but its effects are significantly moderated by price sensitivity.

5. Concluding remarks

This study provides insights into the complex dynamics influencing Egyptian consumers' selection between imported and locally assembled passenger automobiles. The findings highlight that quality commitment, country-of-origin perceptions, expertise, and credibility are the most influential factors driving consumer preferences. In contrast, consumer

ethnocentrism plays a marginal role, suggesting that nationalistic appeals alone are unlikely to shift preferences toward locally assembled cars. Importantly, after-sale services emerged as a significant determinant of consumer behavior, underscoring the strategic importance of service quality, spare parts availability, and warranty systems.

These findings have both theoretical and managerial implications. Theoretically, the study contributes to consumer behavior and international marketing literature by contextualizing traditional constructs (e.g., COO, quality commitment) within an emerging-market setting. Managerially, the results emphasize the need for local assemblers and policymakers to enhance quality perceptions, invest in strong after-sale service networks, and address misperceptions about the capabilities of domestic automotive production.

Future research should expand this qualitative framework by employing quantitative methods to validate relationships across larger and more representative samples. Comparative studies across other emerging economies would also enrich understanding of how contextual differences shape consumer behavior in automotive markets. Ultimately, fostering trust and enhancing the competitiveness of locally assembled vehicles requires both industrial policy support and marketing strategies that align with evolving consumer expectations.

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