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## AI Loyalty

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Brand loyalty is the currency of competitive advantage in a world where products, prices, and technologies can be copied overnight. Loyal customers don't just buy more – they *believe more*, becoming advocates who defend, recommend, and extend a brand's reach organically. In an era defined by choice and chaos, loyalty is the difference between being a click and becoming a conviction. [Brand Keys](#) has spent 40 years developing predictive loyalty metrics to help brands emotionally earn consumer confidence. And profits.

In the past year, understanding loyalty levels to AI brands has become more important for several strategic, psychological, and economic reasons — especially as AI becomes more embedded in consumers' daily lives and business operations.

To that end, Brand Keys applied its independently validated methodology to examine AI brand loyalty — marking the first structured measure of its kind. This study of 2,008 regular AI users drawn from the 9 U.S. Census regions, which provides an empirical view of how users connect both emotionally, rationally, and behaviorally with leading AI platforms versus their AI Ideal.

The survey identified the four drivers of loyalty for AI Brands and their percent contribution to consumer engagement, loyalty and behavior:

### 1. Transparency & Alignment (Emotional Driver) 30%

**What it measures:** Perceived honesty, ethical standards, and shared values between user and brand.

**Why it matters:** Users want to feel the AI reflects their worldview and won't manipulate or mislead them. This includes how open the brand is about its data sources, biases, and business motives.

**User question:** *"Does this AI share my values — or am I being used by it?"*

### 2. Empowerment & Ease (Rational + Emotional Driver) 26%

**What it measures:** The degree to which the AI amplifies a user's ability to think, create, and act — without friction.

**Why it matters:** The most loyal users feel AI expands their potential, not replaces it. Simplicity, intuitive user experience (UX), and usefulness combine with emotional gratification ("I feel smarter, faster, more capable").

**User question:** *"Does this AI make me better at what I do — effortlessly?"*

### 3. Efficacy & Reliability (Rational Driver) 23%

**What it measures:** Consistency, accuracy, and dependability of the AI's output.

**Why it matters:** Users expect AI to "get it right" — whether generating text, answering queries, or automating tasks. Errors or misleading content or insights erode loyalty quickly, while consistent high performance creates confidence and habitual use.

**User question:** "Can I trust what this AI gives me to be correct and useful?"

### 4. Breadth of Perspective & Vision (Emotional Driver) 21%

**What it measures:** The AI's capacity to provide broad, insightful, even inspiring understanding — a sense of *seeing more of the world*.

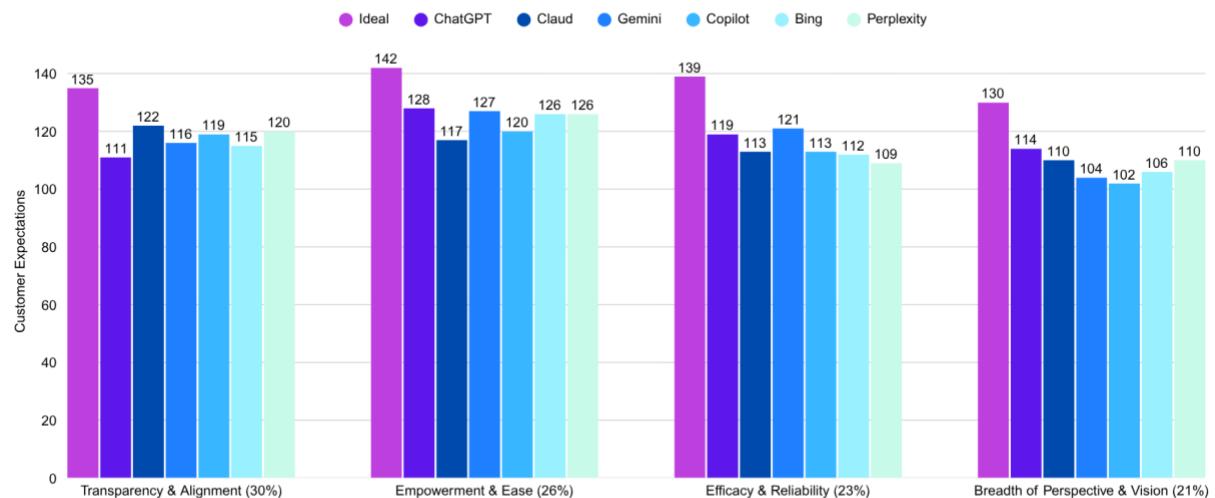
**Why it matters:** Loyalty deepens when users feel their AI "opens doors" intellectually or creatively. This blends rational capability (access to wide data and reasoning) with emotional resonance (feeling enlightened or inspired).

**User question:** "Does this AI help me see the world in a new and meaningful way?"

When examined versus the consumers' **AI Category Ideal**, the brands ranked as follows:

1. **ChatGPT:** Deep user and brand engagement with high trust, frequent daily use, and a strong identity. Strong functional loyalty and emotional identification from mainstream users. Seen as "*the original*" AI brand a pioneering brand they feel part of.
2. **Claude:** Loyal niche. More "intellectual admiration" than mass emotional loyalty. High trust and alignment perception with loyalty driven by perceptions of safety, ethics and clarity. Slightly lower ability to meet expectations held for Empowerment due to narrower public reach.
3. **Google Gemini:** Massive reach but lower emotional engagement. Trust is strong, yet their uneven debut (Bard) still has them in the position of playing "playing catch-up," which always dilutes loyalty. Users treat it as a tool, not a brand relationship.
4. **Microsoft Copilot:** Loyalty strengthened by ecosystem embedding and loyalty from enterprise and productivity users (Office 365, Windows). High functional loyalty, though emotional connection is moderate, lower than ChatGPT. Vision seen as borrowed from OpenAI.
5. **Bing Chat:** Less fandom, more frictionless dependence; less emotional reliance more utilitarian dependence. Benefits from its integration with Microsoft's suite of tools, offering reliability and productivity enhancements. Lacks the innovative appeal and emotional engagement that users expect – and seek out.
6. **Perplexity:** Admired by tech enthusiasts for speed and citation transparency, user empowerment, and a broad perspective but lacks deep emotional loyalty. Brand identity still defining itself; easy to test, easier to switch. Its smaller scale allows for agility and a more personalized user experience, contributing to a higher loyalty potential index.

## AI Brand Engagement & Loyalty



±5 points indicates a significant difference at the 95% confidence level

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Fifteen years ago (2010), the entire customer engagement and loyalty decision-process shifted predominantly to an emotional paradigm. While there are still sectors where rationality dictates behavior, emotional values make up the lion's share of the consumers' engagement, behavior, and loyalty. If *everything* seems like it's more emotional, it is.

In 2025, the ratio of loyalty creation shifted to a cross-category ratio of 85:15<sup>1</sup>. That includes loyalty to AI brands. Based on this new research Brand Keys identified the emotional/rational behavioral ratio for AI brands as follows:

**Emotional:** 68% (Transparency & Alignment + Breadth of Perspective + emotional portion of Empowerment)

**Rational:** 32% (Efficacy & Reliability + rational portion of Empowerment)

There are four immediate take-aways for brand loyalty in the AI category:

1. Even brands that are technically strong (efficacy) still suffer if transparency/alignment are weak.
2. Empowerment and Ease is a high barrier. If users don't *feel* the AI brand is giving them better capability rather than friction, they may churn.
3. Vision matters: The emotional driver, Breadth of Perspective, gives brands a chance to build loyalty beyond utility.
4. Because the category is evolving so quickly and trust is fragile, brands that can better meet expectations, particularly for Transparency & Alignment, are the brands to watch.

<sup>1</sup> Based on an examination of 1,105 brands in 104 categories. See Brand Keys [2025 Customer Loyalty Engagement Index](#).

## Why AI Loyalty Is So Important

When every AI claims to be smarter, faster, and cheaper, loyalty becomes the only real competitive advantage left. Here's why:

**1. Early Indicator of Market Power:** Loyalty signals *which AI ecosystems are “winning” the trust war*. As users commit time, data, and habits to one AI platform (OpenAI, Google, Anthropic, etc.), switching costs increase. Measuring loyalty helps predict future dominance and **platform entrenchment**—just as it did for Apple, Amazon, and Google in earlier tech waves.

**2. Insight Into Emotional Trust and Adoption Barriers:** AI is not just a product. It's a decision partner. Loyalty reveals how much users *trust* AI brands to make recommendations, protect privacy, and act ethically. Understanding loyalty levels helps identify emotional drivers (trust, safety, empowerment) and barriers (fear, skepticism, lack of transparency).

### 3. Guidance for Brand Strategy and Differentiation

AI capabilities are converging, and features will end up being copied. Quickly. Loyalty shows where *brand meaning* still matters. Knowing what makes users loyal helps shape positioning and clarifies which brand values and experiences are likely to generate repeat use and advocacy.

**4. Predictor of Retention, Revenue, and Ecosystem Growth:** In subscription and usage-based AI models, loyal users = recurring revenue. Loyalty identifies which customers are likely to upgrade, evangelize, or expand usage across services. It will help forecast Lifetime Value and churn risk in a rapidly fragmenting market.

**5. Reflection of Cultural and Ethical Alignment:** Consumers increasingly view AI brands as moral actors. Loyalty levels reveal how well a brand's values and ethics align with user expectations about fairness, bias, and transparency. Tracking loyalty shifts helps anticipate reputation risks and societal acceptance.

**6. Early-Warning System for Polarization:** AI loyalty may mirror political or cultural tribalism. Measuring loyalty can uncover emerging identity divides (“I’m a ChatGPT person” vs. “I’m a Gemini person”), signaling deeper psychological segmentation, and is vital for anticipating consumer narratives and media backlash.

As AI becomes the interface of daily life, loyalty will determine which brands users trust to think with, create with, and ultimately live with. In the end, the most powerful algorithm won’t be artificial — it will be emotional.

The annual Brand Keys Customer Loyalty & Engagement Index — which currently measures loyalty in 104 categories from airlines to smartphones — has never included AI. Until now.

The 29<sup>th</sup> annual survey will be released January 2026.

## Methodology

Two-thousand eight (2,008) AI users from the 9 U.S. Census regions assessed the AI brand they “used most often.” Predictive loyalty assessments were calculated using an independently

validated combination of psychological inquiry and higher order statistical analyses (test/re-test reliability: 0.93 with results generalizable at the 95% confidence level). These metrics have been successfully used in B2B, B2C, and D2C categories in 35 countries.

For more information about AI Brand Loyalty or information about integrating predictive loyalty metrics into your marketing, branding, and advertising efforts, contact Robert Passikoff at [robertp@brandkeys.com](mailto:robertp@brandkeys.com)