



VBOs

CANADIAN
VEHICLE BUYER
OPINION STUDY



Study Prospectus for Dealers and Dealer Groups



The first national look on a Canadian new-vehicle market in transition — new powertrains, shifting loyalties, and the arrival of Chinese automotive brands.

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THE OPPORTUNITY

Three simultaneous forces have the potential to reshape the Canadian new-vehicle market:

- An accelerating but uneven shift to electrified powertrains
- The arrival of Chinese automotive brands now that the federal government has opened the door
- Questions about how consumer behaviour may change as brand choices multiply

Taken together, these forces create the conditions for market share to be won or lost quickly.

The *Canadian Vehicle Buyer Opinion Study* (VBOS) is the first syndicated Canadian buyer study built around this moment: a current, national, statistically grounded read on what buyers think, want, and intend to do next — and the clarity to act on it.

ABOUT THE STUDY

 Target Audience	Canadian adults 18+ who have purchased or leased a new vehicle within the last five years
 Sample Size	2,007 respondents sourced from Canada’s largest and most trusted consumer panel Leger Opinion (LEO) with nationally representative coverage by province/region, age and gender
 Psychographic Profile	Respondents are categorized according to their new vehicle purchase motivations including attributes like practicality, reliability, safety, technology/connectivity and environmental impact
 Timing	Data collection: June 23 to July 10, 2026 Report available: Week of August 24th, 2026 Dealer Webinars: Multiple September 2026 dates to be announced with webinars delivered in English and French

STUDY SPONSORS

VBOS is a collaboration between two of Canada’s leading industry experts, Universus Media Group and Clarify — pairing deep automotive industry knowledge and reach with independent research expertise.

STUDY SPONSOR



Universus Media Group Inc. is a leading automotive marketing communications firm and publisher of *Canadian auto dealer* and *Affaires automobiles*, Canada’s leading print and digital channels for new-car dealers, with direct reach into the dealer community.

RESEARCH LEAD



Clarify Group Inc. is a Canadian automotive market research and advisory firm combining research, data and analytics, advisory and training/consulting capabilities to support our clients to go beyond the data (“What?”) to the “So What?” and “Now What?” implications for their business.

Clarify is a trusted research partner to several leading automotive industry stakeholders including the Canadian Automobile Dealers Association (CADA) and several of North America’s largest auto shows including Toronto, New York, Los Angeles, Montréal, Vancouver and Québec City.

Clarify is responsible for VBOS design, execution and reporting deliverables.

VBOS: UNIQUE VOICE OF CONSUMERS PERSPECTIVES

While other industry reports track high-level consumer interest, VBOS goes beyond surface level to examine the granular “why” behind Canadian consumer behaviour. VBOS offers unique and timely insights not found in other studies including:

Country of Origin Brand Equity

How Canadians perceive brands and vehicles from different regions including China, Japan, South Korea, Europe and North America across seven dimensions — a direct read on how consumer perceptions shape intention.

Brand-Level Intelligence on Potential New Entrants

Awareness, familiarity, and unprompted associations for fifteen named Chinese brands, plus consideration likelihood and the specific perceptions/barriers that hold buyers back including data privacy, ethical and social impact considerations, cold weather performance and durability.



Loyalty, Conquest and Switching

To what degree are owners likely to remain loyal to the brand and/or to the dealer, and where is there brand defection risk or conquest opportunity?

Powertrain Demand and the EV Trajectory

Current ownership and next-purchase intention across gas, diesel, hybrid, PHEV, and BEV, plus EV exposure among non-owners. VBOS measures consumer intention across every powertrain so the EV question is answered in the context of the entire market — not in isolation.

The Path to the Sale and the Role of the Dealer

A unique look at how franchise dealers can influence the consumer's path to purchase with new brands, including insights into Canadians' preferences on information sources, test drives and retail channels.

Purchase Funnel Dynamics

Where are consumers in the purchase funnel:

- Timing
- Body-style
- New versus used cross-shopping
- Anticipated purchase price and monthly payment
- Chinese vehicle acquisition preference: lease, loan or cash
- Demographic and household segmentation



HOW DEALERS CAN LEVERAGE VBOS INSIGHTS

Franchise Representation Strategy

- Weigh the Chinese-brand decision on real demand and consideration — not hype — including how much influence established dealers have on consumer brand choice

Inventory Alignment

- Forecast stocking priorities with an understanding of consumer purchase timing and powertrain intentions over the next 3, 6, 12 and 24 months

Marketing and Media Targeting

- Focus spend in each province based on how consumers decide and the channels they actually use — from social and AI tools to journalists and dealers

For Dealers Considering Adding a Chinese Brand Franchise

- **Sales Conversion:** Match your sales process to how buyers decide, where they want to shop, how they prefer to test drive, and the specific objections you will face
- **F&I Optimization:** Understand whether buyers will shop on total price or monthly payment, what intended budgets are for the next vehicle, and how they intend to pay for it (loan, lease or cash)

DEALER AND DEALER GROUP STUDY ACCESS FEE

2026 Canadian Vehicle Buyer Opinion Study

Pricing in \$CAD excluding applicable taxes

\$2,950

Your access fee includes:

- **Comprehensive study report** including national and regional results (BC, Prairies, Ontario, Québec and Atlantic)
- **Interactive dashboard** with access to the dataset to explore, cross-tabulate, and segment the results
- **Participation in VBOS debrief webinar** conducted by a senior Clarify automotive research leader
- **OPTIONAL Executive debrief** conducted by a senior Clarify automotive research leader, conducted onsite or virtually including strategic implications for your brand(s) — *please inquire for pricing*

To subscribe or learn more, contact:



Darren Slind
Co-Founder and President, Clarify Group Inc.
✉ dslind@clarifygroup.com
☎ +1 647 294 3033
www.clarifygroup.com



Mark James
Director PR and Corporate Communications, Universus Media Group Inc.
✉ mjames@universusmediagroup.com
☎ +1 416 508 1670
www.universusmediagroup.com