



VBOs

CANADIAN
VEHICLE BUYER
OPINION STUDY



Study Prospectus for Government Policymakers



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 Executive debriefs: Scheduled in consultation with each subscriber during the period August 24 to October 24, 2026

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.

Public Support for New Brand Entry Policy

Canadian sentiment by region (BC, Prairies, ON, QC, Atlantic) regarding the federal government’s decision to admit Chinese automotive brands, including:

- Overall level of public support or opposition to the policy
- Key reasons behind public support including such factors as improving vehicle affordability and expanding competition and consumer choice
- Likelihood of Canadians to consider a Chinese brand vehicle
- Reasons why Canadians may hesitate to consider a Chinese brand vehicle such as no prior experience/unfamiliarity, perceived quality and reliability, and the level of parts and service support

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.

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 POLICYMAKERS CAN LEVERAGE VBOS INSIGHTS

Trade and Market-Access Sentiment

- Gauge public support for admitting new foreign brands, and how Canadians weigh it against jobs, human rights, free trade, and U.S. trade relations

Data Privacy and Vehicle Safety

- Track public concern over connected-vehicle data and security, and the weight buyers give to things like safety standards, crash ratings, and durability

ZEV Transition and Climate Targets

- Understand EV exposure among non ZEV owners, and measure intent across Hybrid, PHEV, and BEV to guide infrastructure and incentive programs

Affordability and Regional Equity

- Index purchase-price and monthly-payment expectations by region (BC, Prairies, Ontario, Québec and Atlantic), cross-referenced with income and demographics, to inform equitable transportation policy

POLICYMAKER STUDY ACCESS FEE

2026 Canadian Vehicle Buyer Opinion Study

Pricing in \$CAD excluding applicable taxes

\$9,450

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
- **Executive debrief** conducted by a senior Clarify automotive research leader, conducted virtually including strategic implications for your brand(s)

To subscribe or learn more, contact:



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