



Motor
Vehicle Sales Authority
of British Columbia

Motor Vehicle Sales Authority of British Columbia

2013 Public Confidence Study



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Introduction

Background and Objectives

Background and Objectives

- The Motor Vehicle Sales Authority of British Columbia (VSA) is a not-for-profit delegated authority. Its primary role is to administer and enforce provincial acts including the *Motor Dealer Act* and the *Business Practices and Consumer Protection Act*. The VSA licenses approximately 1,450 motor dealers and the 6,750 dealership employees who are engaged in selling motor vehicles for personal use. The provincial government legislates the licensing of motor dealers and salespeople as well as providing consumer protection and business practices legislation.
- Through proactive efforts the VSA hopes to build an informed and confident motor vehicle consumer in British Columbia.
- The primary purpose of this research is to measure public confidence in the motor vehicle sales industry in British Columbia. This research will provide valuable information about attitudes and perceptions toward the industry, which will enable the VSA to make informed marketing decisions to more effectively accomplish its goal.
- The objectives of this research are to:
 - Measure public confidence in the motor vehicle sales industry in British Columbia among the general public as well as vehicle buyers/leases;
 - Assess perceptions of the motor vehicle sales industry overall and on relevant attributes;
 - Measure the progress the industry and the VSA has made in accomplishing their mission of improving industry professionalism and public perceptions over time; and,
 - Measure awareness of the VSA and its role within British Columbia.



Introduction

Methodology

To fulfill the objectives of this research, the following approach was taken.

Omnibus Survey (Represents All Adult British Columbia Residents)

- In order to gauge overall public confidence in the motor vehicle sales industry in British Columbia, several questions were added to Ipsos Reid's BC Omnibus survey. The omnibus surveys a representative sample of British Columbian adults on a weekly basis. Questions were added to the omnibus for two reasons. Firstly, to measure the incidence of vehicle purchase/lease behaviour across specific regions within British Columbia. The second reason was to measure the British Columbia public's overall confidence in motor vehicle sales industry.
- 851 online surveys were completed between the dates of March 20 to 26, 2013.

Custom Survey of Recent Vehicle buyers

- This study was conducted online using Ipsos Reid's i-Say panel.
 - Those who participated in the survey met the following criteria:
 - 18 years of age or older;
 - Does not personally, nor does any member of their household work in the automotive industry;
 - Mainly or jointly responsible for purchase or lease decisions for motor vehicles in their household; and,
 - Bought/leased a vehicle from a dealership or through a private sale within the past five years OR had not bought/leased in the past five years but are very likely to purchase/lease a vehicle in the next 12 months.

- Quota groups were established to ensure sufficient sample sizes for analysis by subgroups.
 - Region:
 - Lower Mainland (defined as Anmore, Belcarra, Bowen Island, Burnaby, Coquitlam, Delta, Langley, Lions Bay, Maple Ridge, New Westminster, North Vancouver, Pitt Meadows, Port Coquitlam, Port Moody, Richmond, Surrey, Vancouver, West Vancouver, White Rock, Abbotsford/Mission, Chilliwack, Hope).
 - Other Urban British Columbia (defined as Kelowna/West Kelowna/Westbank, Prince George, Victoria – including Sooke, Sidney, Schwartz Bay area, Kamloops, Nanaimo).
 - Rest of British Columbia (all other areas of British Columbia).
 - Most Recent Vehicle Purchase/Likelihood to Purchase
 - Past 12 month purchase/lease
 - 13 months to 2 years ago
 - Just over 2 years ago to 5 years ago
 - Bought/lease vehicle over 5 years ago or never, and very likely to buy/lease a vehicle in the next 12 months
- 822 online surveys were completed between the dates of March 22 and April 2, 2013.
- Data was weighted by region and the incidence of the British Columbia adult population who bought/leased a vehicle within the past 5 years (broken down by three time periods) and those who have not bought in the past 5 years but are very likely to buy/lease a vehicle within the next 12 months.
- The margin error on the total sample is +/-3.42%. The margin of error for subgroups is shown in Appendix 1.



Key Highlights

Confidence in the Motor Vehicle Sales Industry in BC

- Overall, the majority of British Columbians are confident in the motor vehicle sales industry in the province. Vehicle buyers/lesors who have dealt with a dealership in the past five years have a top3box confidence rating of 37%. Overall, 80% of consumers offered a positive confidence rating.
- Upward trending indicates that vehicle buyers/lesors in the past year are more likely to provide positive ratings compared to those who bought/leased a vehicle between two and five years ago (42% of those who purchased in the past year rated confidence in the top3boxes compared to 34% of those who purchased two to five years ago).

Purchase Experience – Dealerships

- The majority of past five year vehicle buyers/lesors who bought/leased through a dealership gave positive purchase experience ratings – for the experience overall and the salesperson. Buyers who conducted their transaction in the past 12 months are more likely to provide ‘excellent’ ratings than those who bought over one year ago.
- There has been a significant improvement over the past five years in dealership or salespersons’ ratings for helpfulness, use of consumer friendly terminology, professionalism, clarity of pricing, sales approach for the vehicle and options, availability of advertised product, and trust.
- These positive changes over time are further seen when past five year buyers/lesors were asked to compare their most recent experience with prior experiences. Over one-third of those who bought through a dealership say their most recent experience was better than any prior experiences. There has been a significant increase in the proportion of buyers/lesors who gave a positive comparison rating.
- In the past year, more buyers are receiving a mechanical inspection report and vehicle history report than five years ago.
- One-third (32%) of past five year buyers/lesors report having a minor or major problem or issue during the buying/leasing process. This incidence is similar to the 2008 survey results at 35%. The most commonly mentioned problems were poor customer service, problems with the purchase or sale agreement, issues with the vehicle price and minor mechanical issues.

The VSA

- Awareness of the VSA is very low on an unaided basis. Still low on an aided basis, there is an upward trend for increased awareness of the organization among those who bought/leased a vehicle in the past 12 months regardless of the region (11% vs. 6% of those who bought/leased a vehicle between two and five years ago).
- The VSA is mentioned by very few salespeople or dealership staff during the buying process. While a small proportion of vehicle buyers/lesors are aware that sales staff are licensed by the VSA, the majority are not aware that salespeople in the industry must be licensed by the VSA.

Future Strategies and Considerations

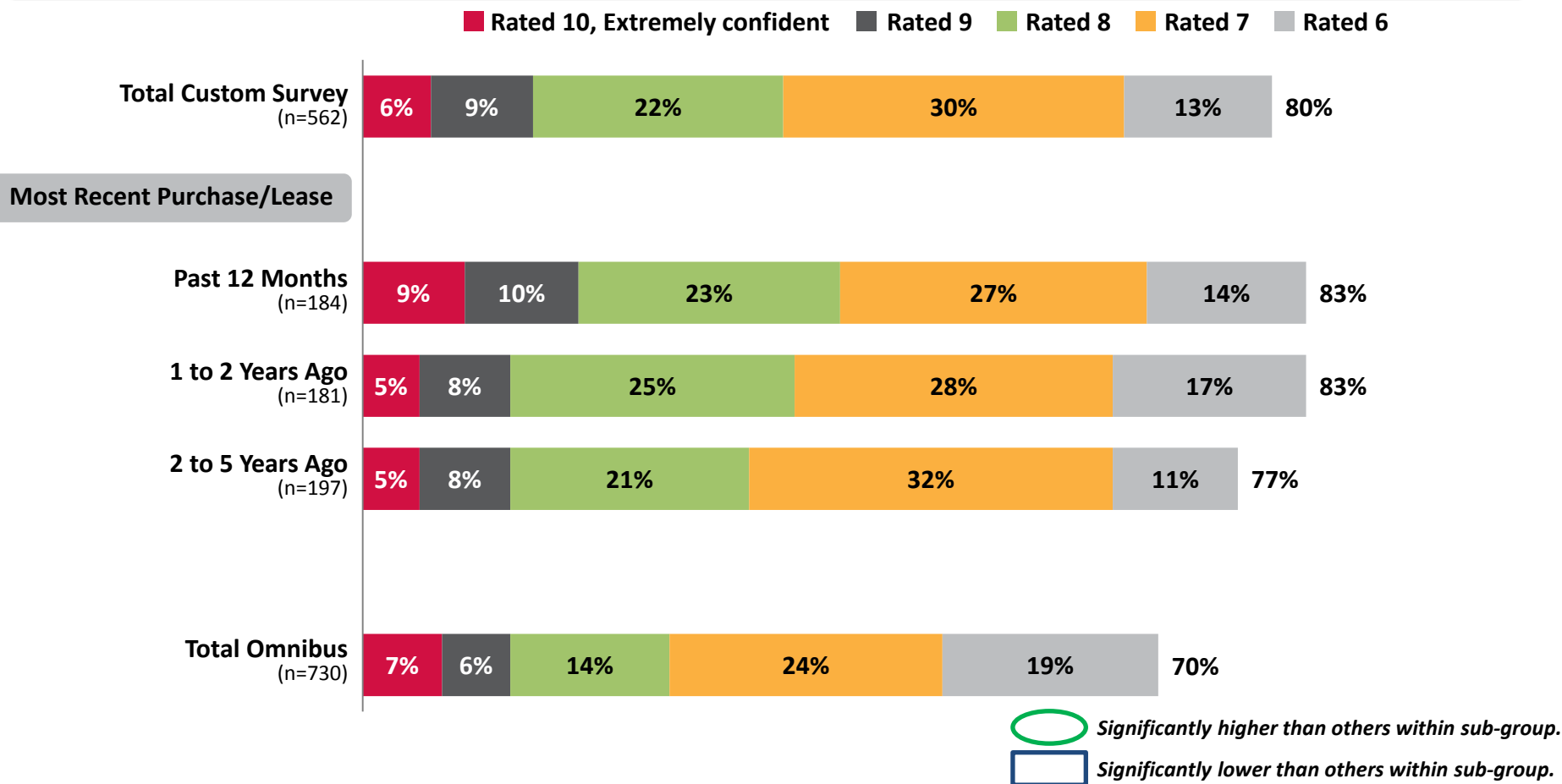
- Campaigns to increase public awareness of the VSA and their mandate in general would be beneficial so that vehicle buyers/lesors would know where they can turn if they have a concern or issue or to get information prior to the buying process.
- Increased public awareness that salespeople within the industry must be licensed by an organization like the VSA would potentially help dispel negative images of the industry. Customer service, pricing and the salesperson are the most common reasons for high confidence ratings for the industry.
- Future studies should consider incorporating a larger sample of those who purchased through independent dealers. A separate study could cover motorcycle and RV dealerships as these dealerships were represented by only two percent of the total sample.

Detailed Findings:

Confidence in the Motor Vehicle
Sales Industry

Confidence in the Motor Vehicle Sales Industry

- Confidence in the motor vehicle sales industry is higher for those who have purchased/leased a vehicle through a dealership in the past five years compared to British Columbians overall (as revealed in the Omnibus results).
- Confidence levels appear to be on an upward trend for those who purchased/leased a vehicle in the past 12 months compared to 2 to 5 years ago (42% of those who purchased/leased in the past 12 months rated confidence in the top3boxes vs. 34% of those who purchased/leased 2 to 5 years ago).
- There are no regional or demographic differences.



Base: All British Columbia Respondents & Among those who bought/leased a vehicle through a dealership, excluding don't know

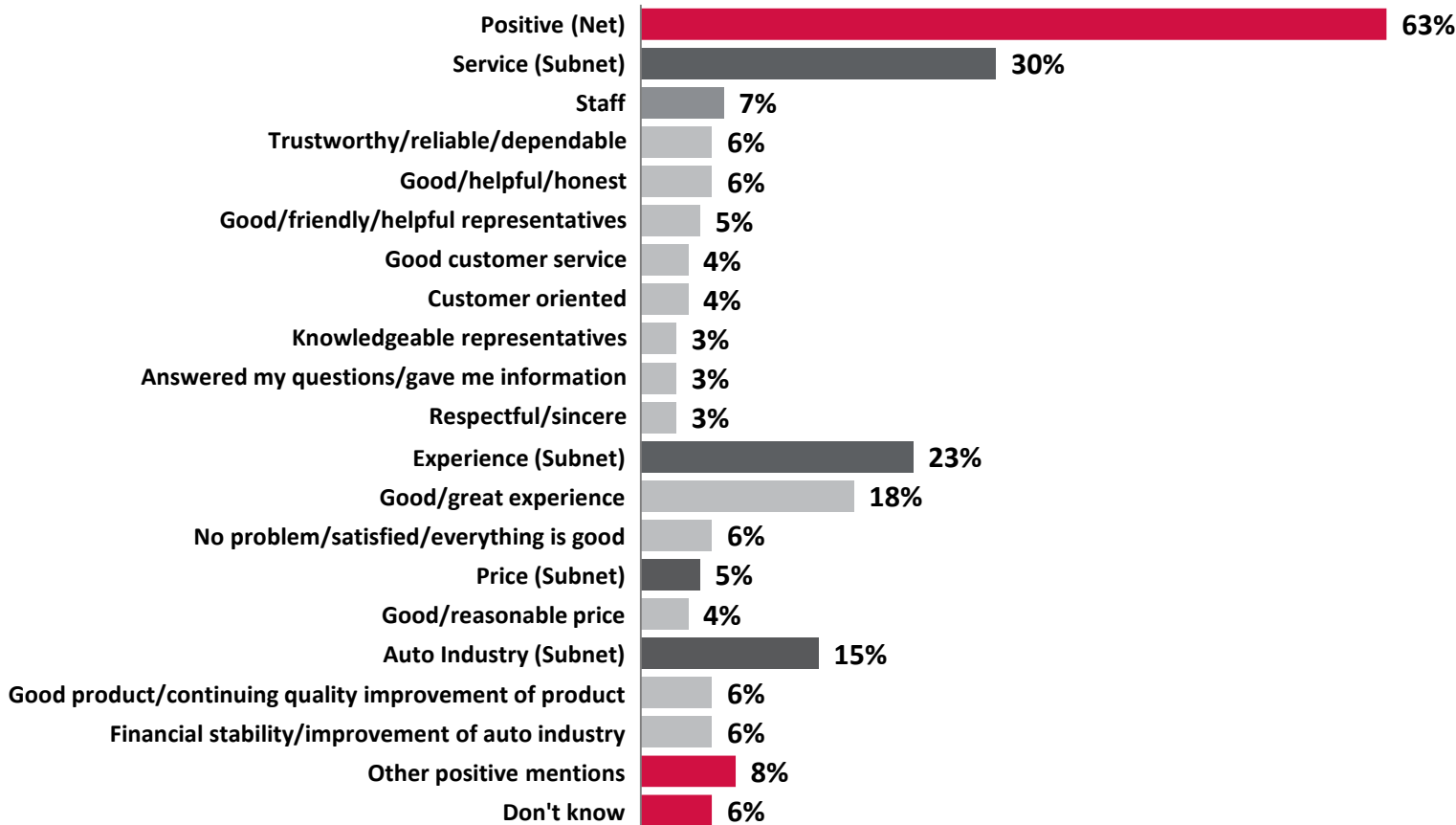
C3. Overall, excluding private sales, how confident are you in the motor vehicle sales industry in BC? Where 1 = not at all confident and 10= extremely confident

Reasons for Positive Confidence Ratings

Among those who bought/leased through a dealership

- Reasons for positive confidence ratings relate primarily to customer service, the salesperson and the overall experience.
- The base size of those who gave low confidence ratings was too small to show.

Reasons Rated 8 to 10



Note: Only Total responses of 3% or higher are shown.

Base: Among those who bought/leased a vehicle in the past 5 years through a Dealership and is confident about the motor vehicle sales industry in BC (n=211)

C4. Why did you provide a rating of ...? Please remember to exclude any experiences you may have had with private sales.

Detailed Findings:

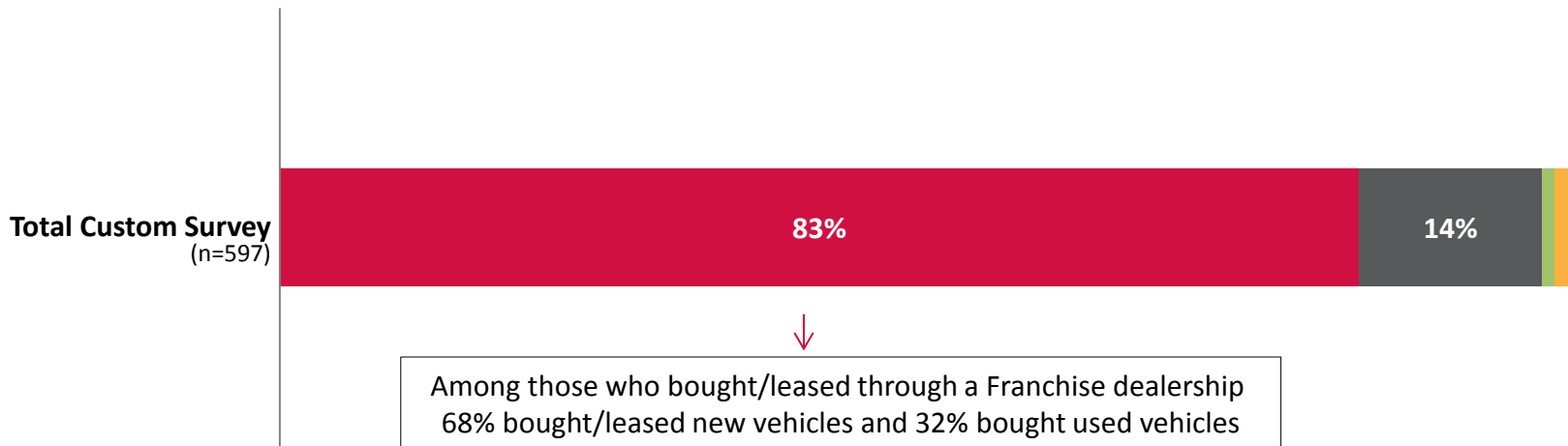
Most Recent Vehicle Purchases:
Dealership

Type of Dealership Bought/Leased Vehicle From

Among those who purchased through a dealership

- Overall, eight-in-ten most recent vehicle purchases/leases were through a franchised dealership.
- These proportions are high for franchised dealers as we did not set quotas for independent dealers in the study design.
- There were no regional differences.

■ Franchise dealership
 ■ Independent dealership
 ■ RV dealership
 ■ Motorcycle/motor scooter/moped dealership
 ■ Don't know



BC Vehicle Sales (Provided by VSA)	2012	2011	2010
Franchise dealers: % of regulated sales	65.9%	62.0%	61.9%
Independent dealers: % of regulated sales	31.1%	34.7%	34.5%
Motorcycles: % of regulated sales	1.7%	1.7%	2.0%
New RVs: % of regulated sales	1.4%	1.6%	1.5%
	100%	100%	100%

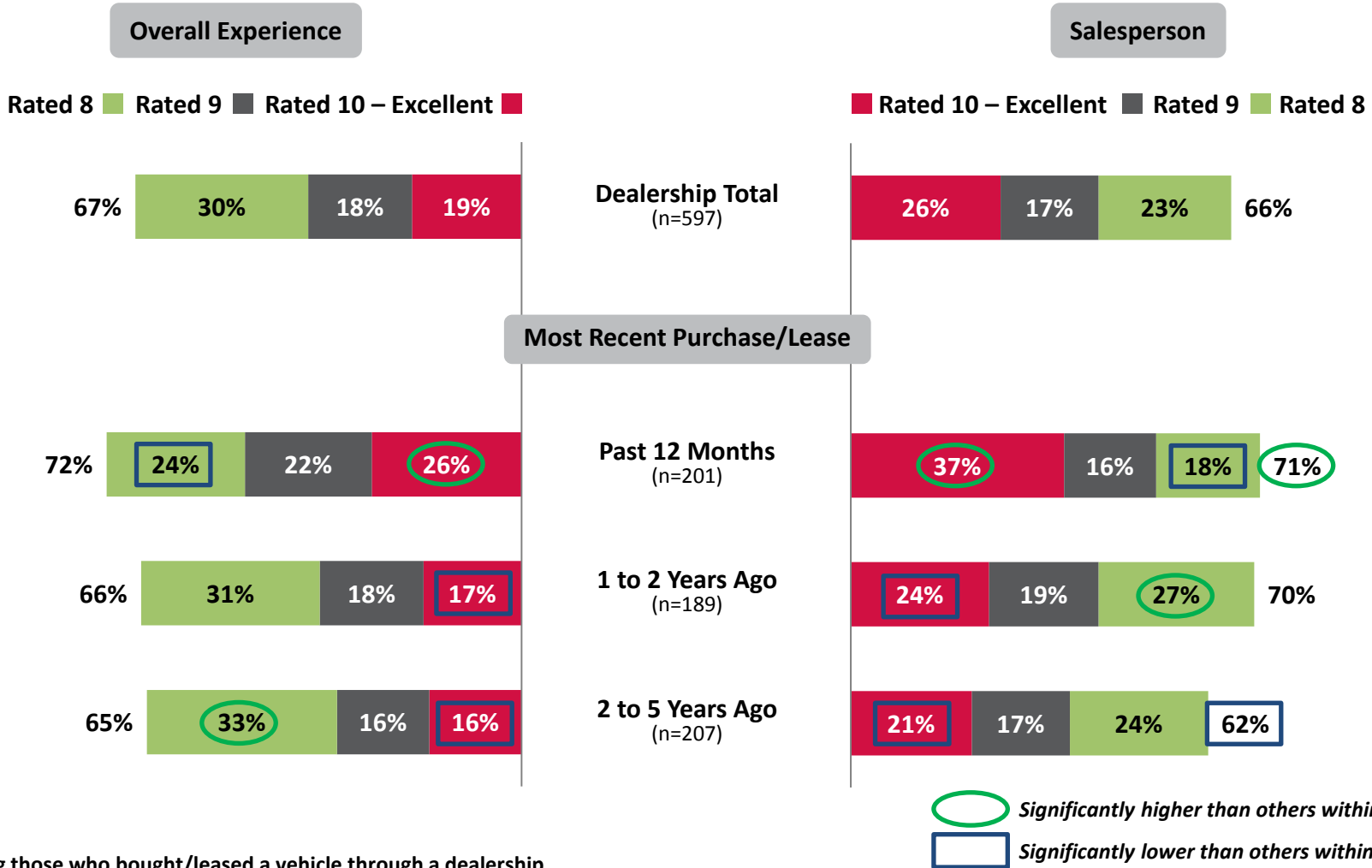
 Significantly higher than others within sub-group.

 Significantly lower than others within sub-group.

Overall Rating of Purchase/Lease Experience & Salesperson

Among those who bought/leased through a dealership

- Overall vehicle purchase/lease experiences in BC are positive. Two-thirds of most recent buyers/lesors gave positive ratings of 8,9, or 10 on a 10 point scale where 10 means excellent. Ratings over time, for the overall experience and the salesperson, have improved significantly for those who bought their most recent vehicle in the past 12 months (71%) compared to those who bought 2 to 5 years ago (62%). There were no regional differences.



Base: Among those who bought/leased a vehicle through a dealership

C1. Still thinking of the last time you bought/leased a vehicle from a dealership, please rate your vehicle purchasing/leasing experience overall.

C2. Please rate your experience overall with the salesperson who sold you the vehicle.

Ratings of Dealership or Salesperson on Attributes

Among those who purchased / leased through a dealership

- Overall, ratings on various attributes related to the dealership or salesperson are positive. Among buyers/lesors in the past 12 months these ratings are significantly higher than for those who bought/leased their vehicle 2-5 years ago.
- Attributes such as sales approach for added products/warranties, clarity of financing, and availability of advertised financing received fewer favourable ratings and should be areas of improvement for the industry. While these attributes do not show significant differences between those who bought/leased in the past 12 months compared to 5 years ago, they are showing directional upward movements. There were no regional differences.

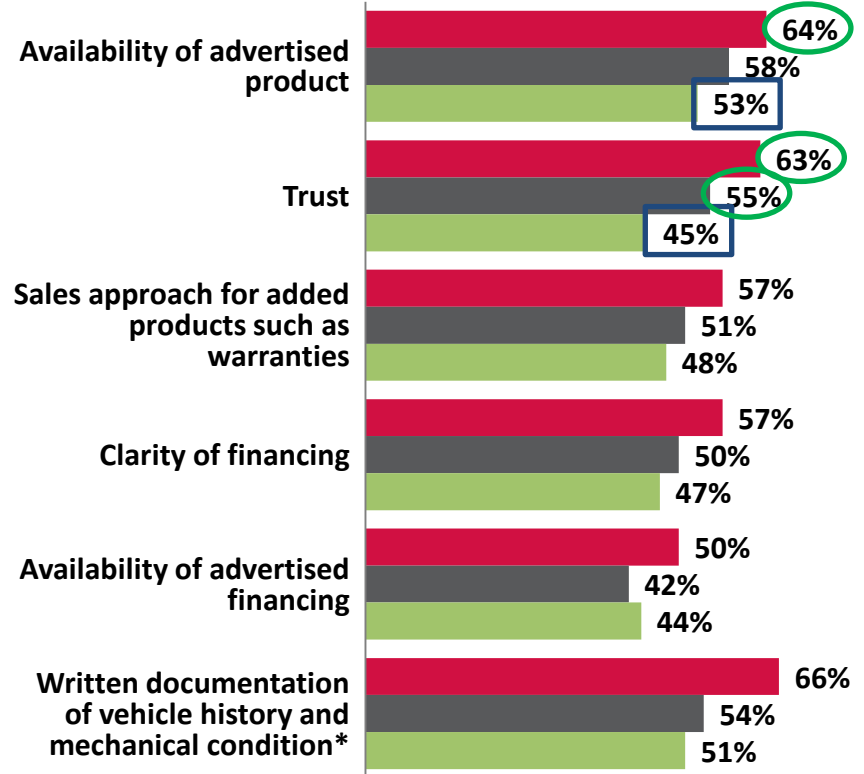
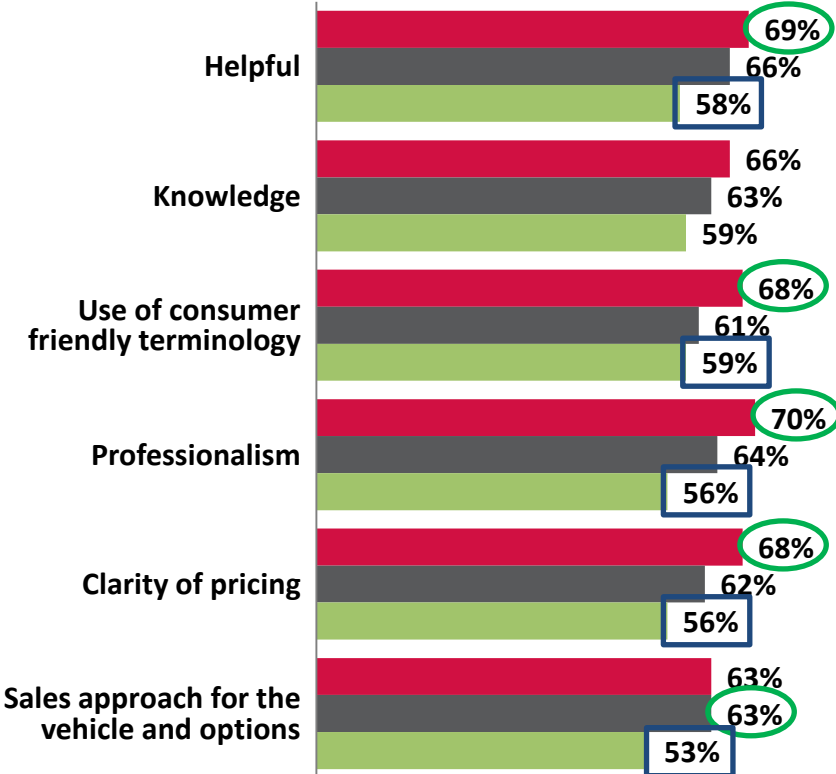
■ Past 12 Months (n=201)

■ 1 to 2 Years Ago (n=189)

■ 2 to 5 Years Ago (n=207)

Top-3-Box (8,9, or 10, where 10=excellent)

○ Significantly higher than others within sub-group.
□ Significantly lower than others within sub-group.



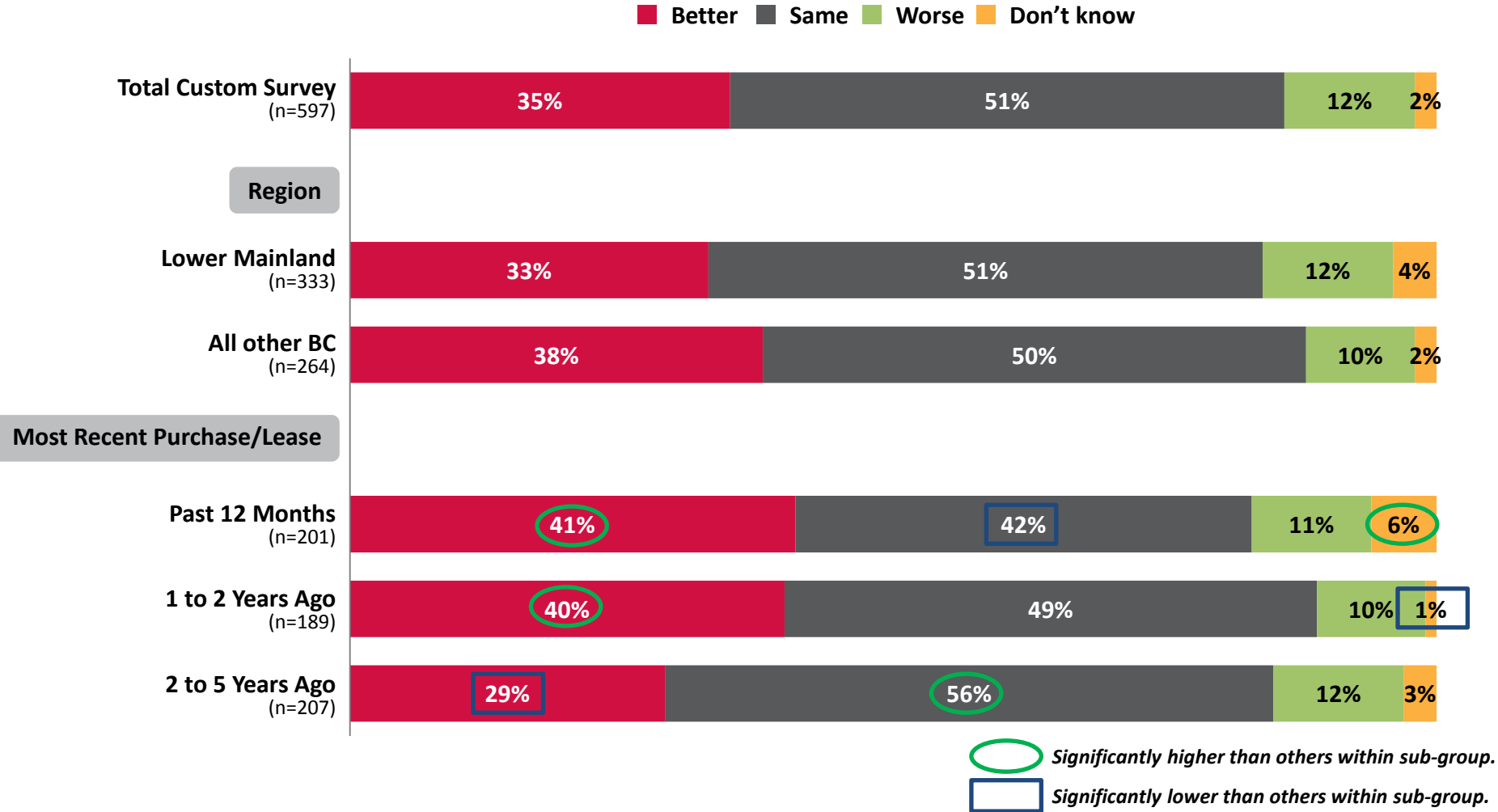
Base: Among those who bought/leased a vehicle through a dealership (n=597); *Base: Among those who bought/leased a used vehicle through a dealership (n=232)

C5. Thinking of your most recent motor vehicle purchase, please rate the dealership or salesperson(s) you dealt with on the following statements. 1 = poor and 10 = excellent

Comparison to Last Purchase

Among those who purchased through a dealership

- Over one-third (35%) of vehicle buyers say their most recent experience was better than previous experiences. These positive perceptions are significantly higher among those who bought/leased a vehicle in the past 2 years (41% of those who bought/leased 12 months ago, 40% of those who bought/leased 1-2 years ago) compared to those who bought/leased 2 to 5 years ago (29%).

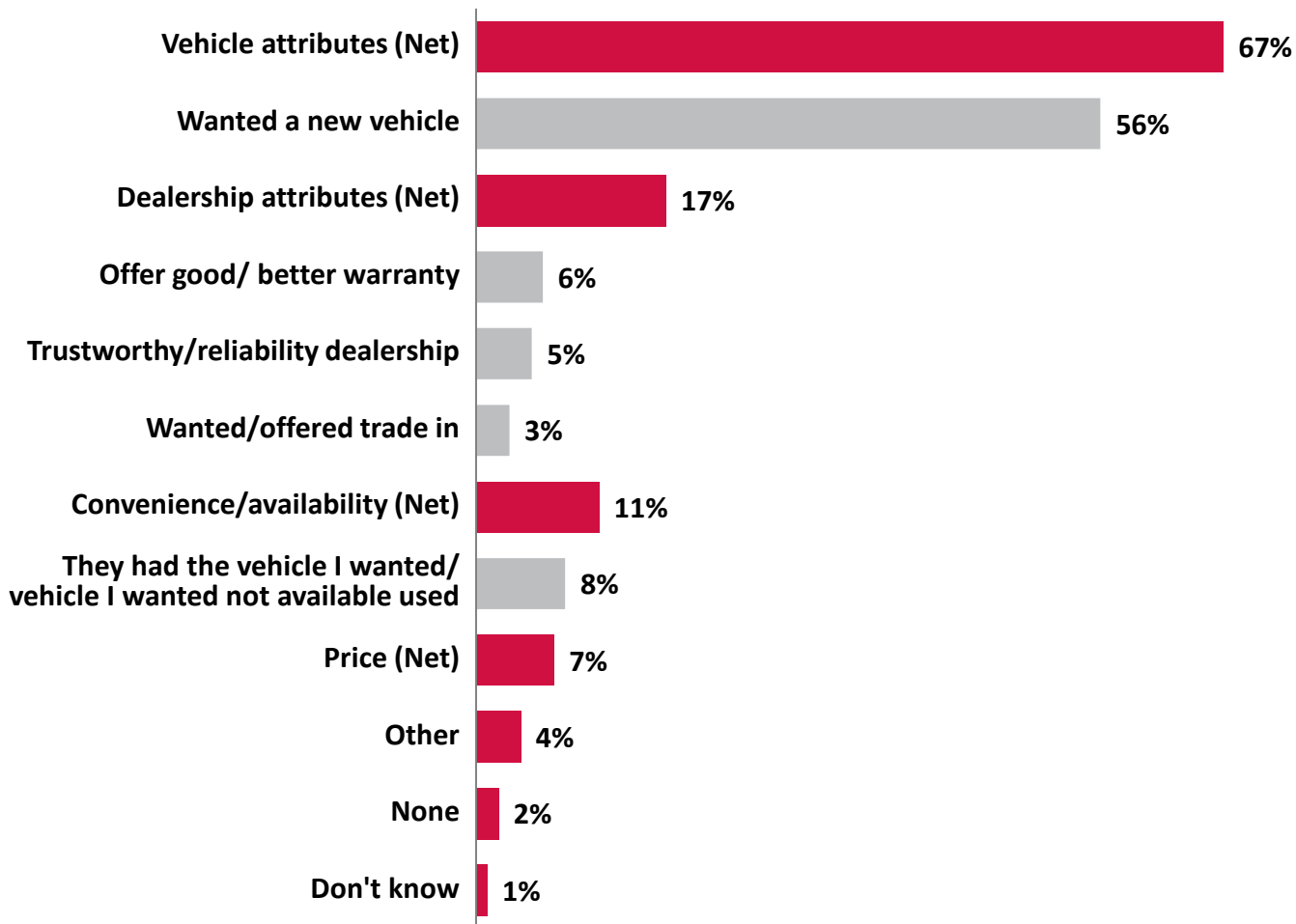


Base: Among those who bought/leased a vehicle in the past 5 years through a dealership

E5. Compared to any prior experience buying/leasing a vehicle was your most recent purchase experience...

Reasons for Purchasing/Leasing Through Dealership

- The main reason for purchasing/leasing through a dealership is the desire for a new vehicle. Warranties and the reliability of a dealer were also mentioned as reasons for choosing a dealer over a private sale.



Note: Only Total responses of 3% or greater are shown.

Base: Among those who bought/leased a vehicle through a dealership (n=597)

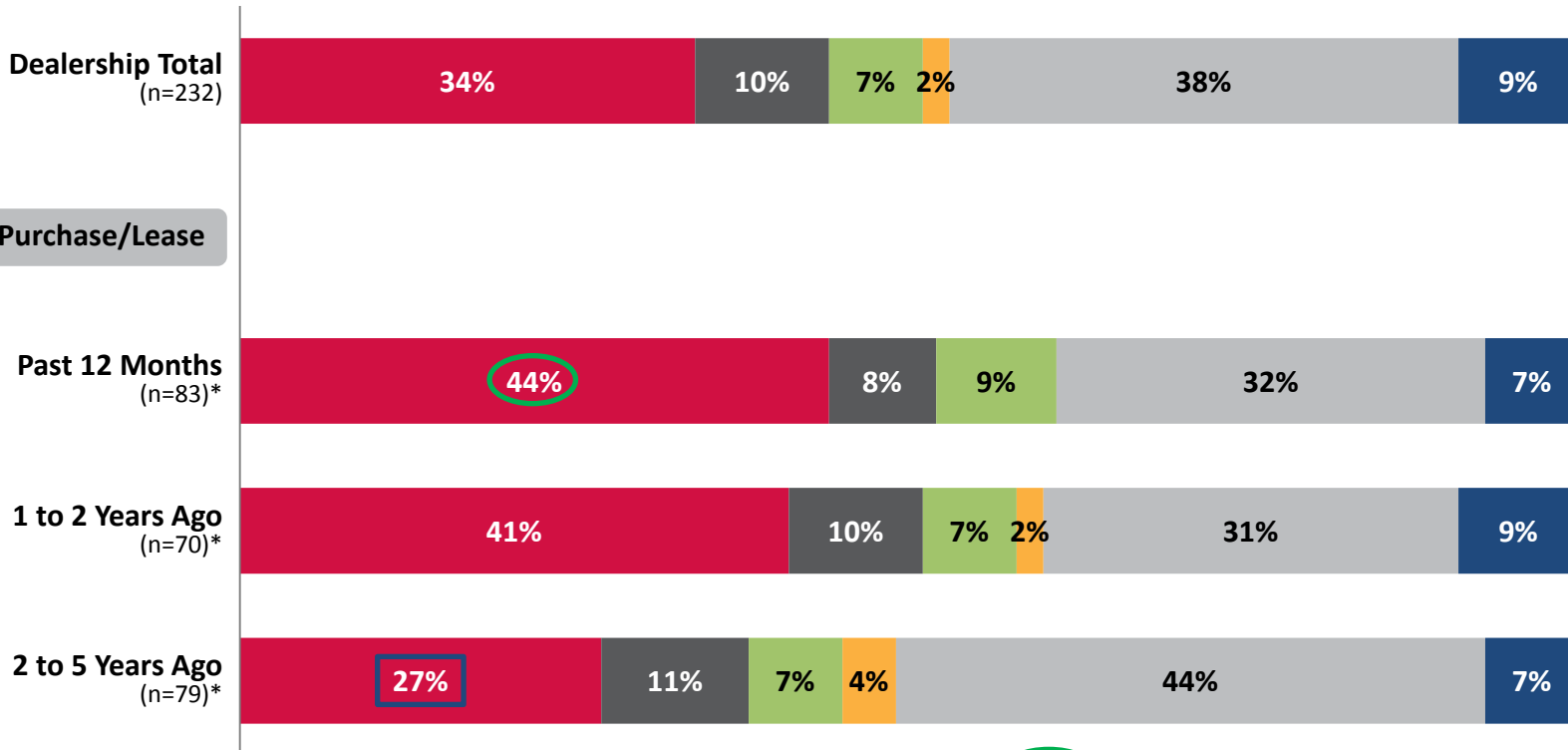
A6/A7. Why did you choose to purchase your most recent motor vehicle through a dealership rather than through a private sale?

Mechanical Inspection – Used Vehicle buyers

Among those who purchased through a dealership

- There have been improvements over time in those who are offered a mechanical inspection or results of an inspection without asking. Four-in-ten (44%) past 12 months buyers were offered this inspection or the results of one compared to 27% of those who bought a used car 2-5 years ago.
- There were no regional differences.

■ Offered mechanical inspection or results of an inspection without asking
 ■ Asked for mechanical inspection or results of an inspection and received them
 ■ Asked for mechanical inspection and was allowed to have vehicle tested offsite
 ■ Asked for mechanical inspection and was NOT allowed to have vehicle tested offsite
 ■ Did not ask for and was not offered mechanical inspection
 ■ Don't know



44% Significantly higher than others within sub-group.
27% Significantly lower than others within sub-group.

*Small base size, interpret with caution.

Base: Among those who bought/leased a used vehicle through a dealership

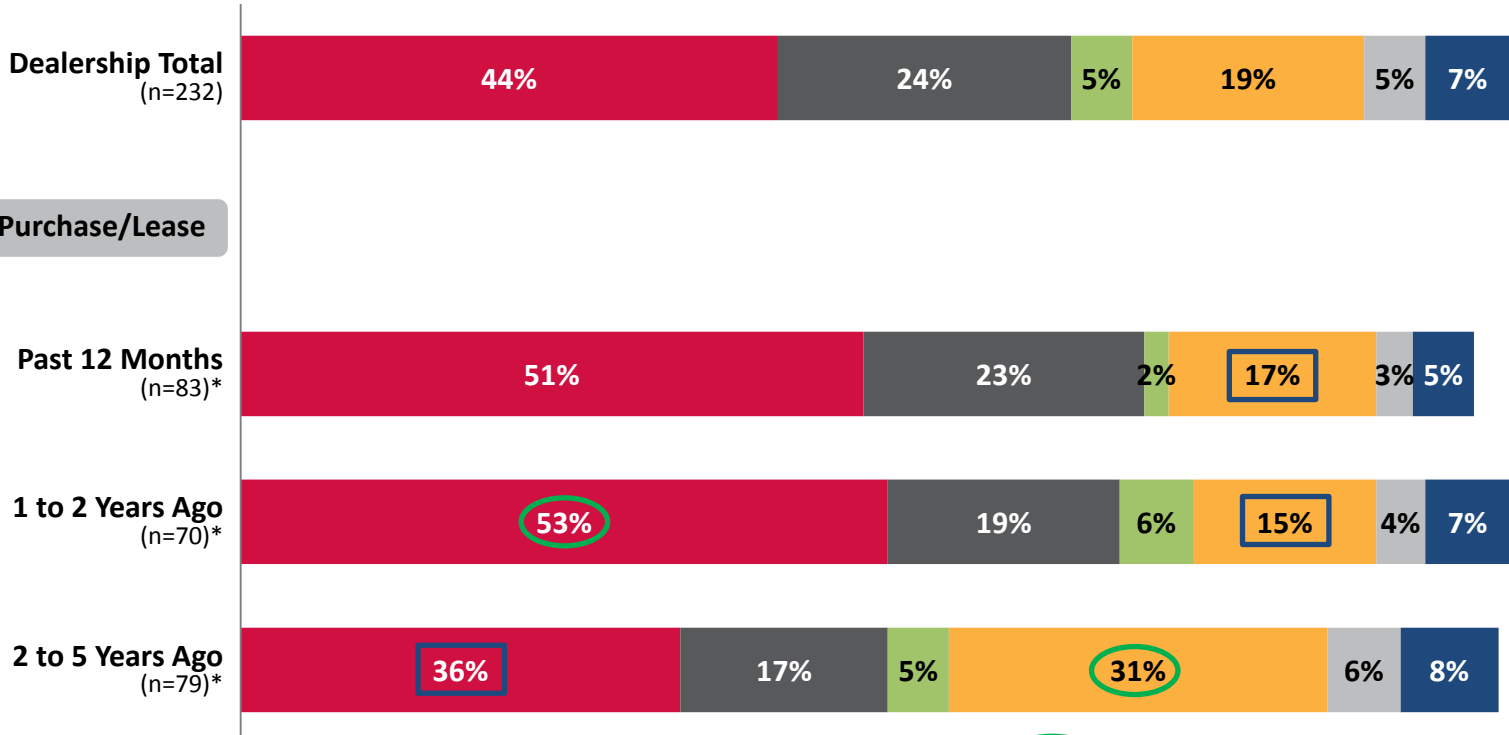
E9. When buying/leasing your most recent used vehicle, were you offered or did you ask for a mechanical inspection by a qualified, independent mechanic?

Vehicle History Report – Used Vehicle buyers

Among those who purchased through a dealership

- The majority of used car buyers received a vehicle history report whether they asked for it or it was provided.
- There is upward trending for obtaining a vehicle history report in more recent years compared to 2-5 years ago. Half (51%) of used vehicle buyers who purchased their vehicle in the past 12 months were offered a vehicle history report without asking compared to 36% of used vehicle buyers 2 to 5 years ago.
- There are no regional differences.

■ Offered vehicle history report without asking
 ■ Asked for vehicle history report and it was provided
 ■ Obtained my own vehicle history report
 ■ Did not ask for and was not offered vehicle history report
 ■ Asked for vehicle history report but it was not provided
 ■ Don't know



 Significantly higher than others within sub-group.
 Significantly lower than others within sub-group.

*Small base size, interpret with caution.

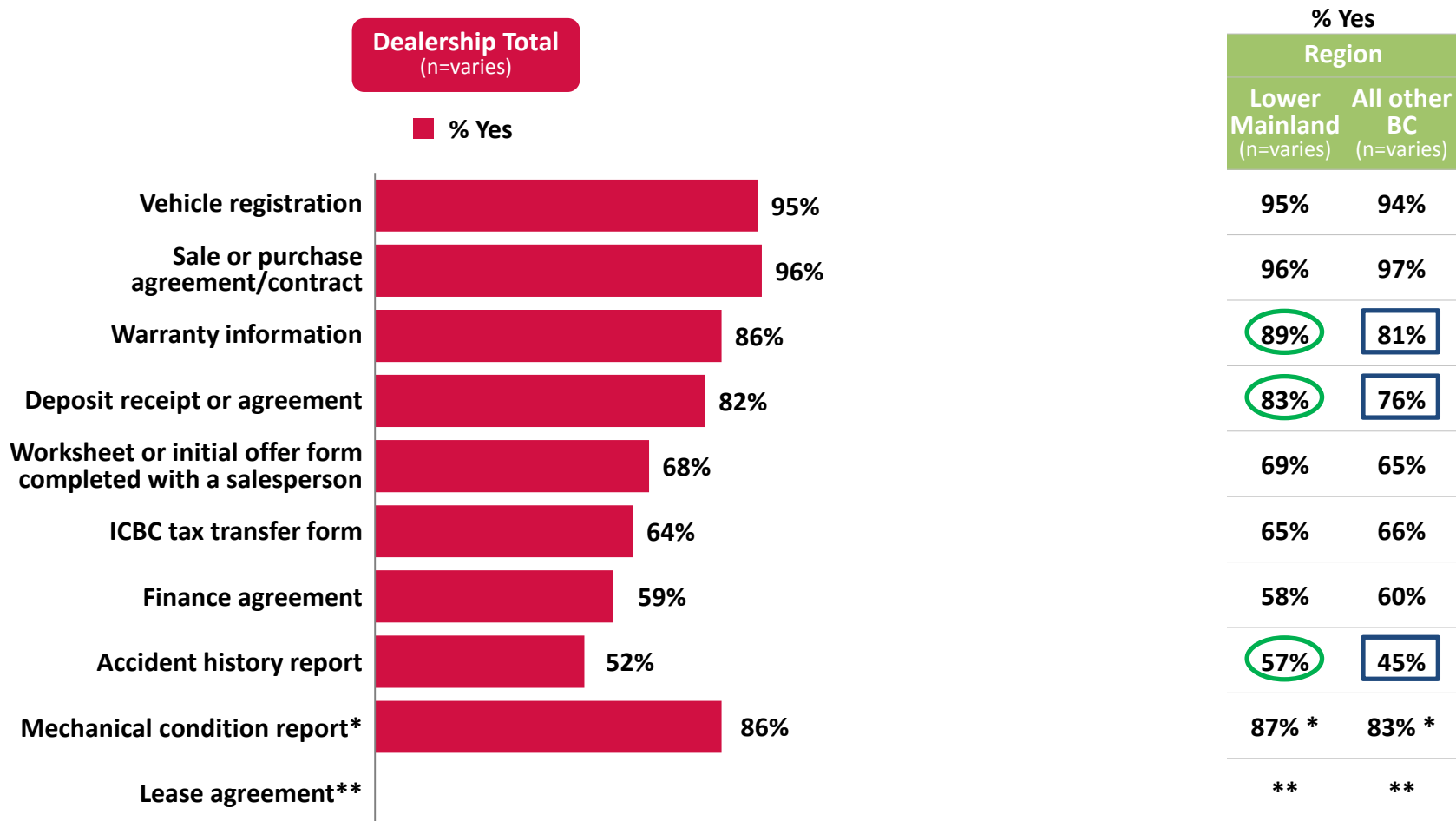
Base: Among those who bought/leased a used vehicle through a dealership

E10. When buying/leasing your most recent used vehicle, were you offered or did you ask for a vehicle history report (eg. from ICBC or CarProof)? Please choose as many as apply.

Received Vehicle Documentation

Among those who purchased through a dealership

- Certain documentation such as warranty information, deposit receipts or agreement, and an accident history report are more likely to be provided to used car buyers in the lower mainland than in other parts of the province.



*Small base size, interpret with caution; **Base size too small to be shown.

Base: Among those who bought/leased a used vehicle in the past 5 years through a dealer

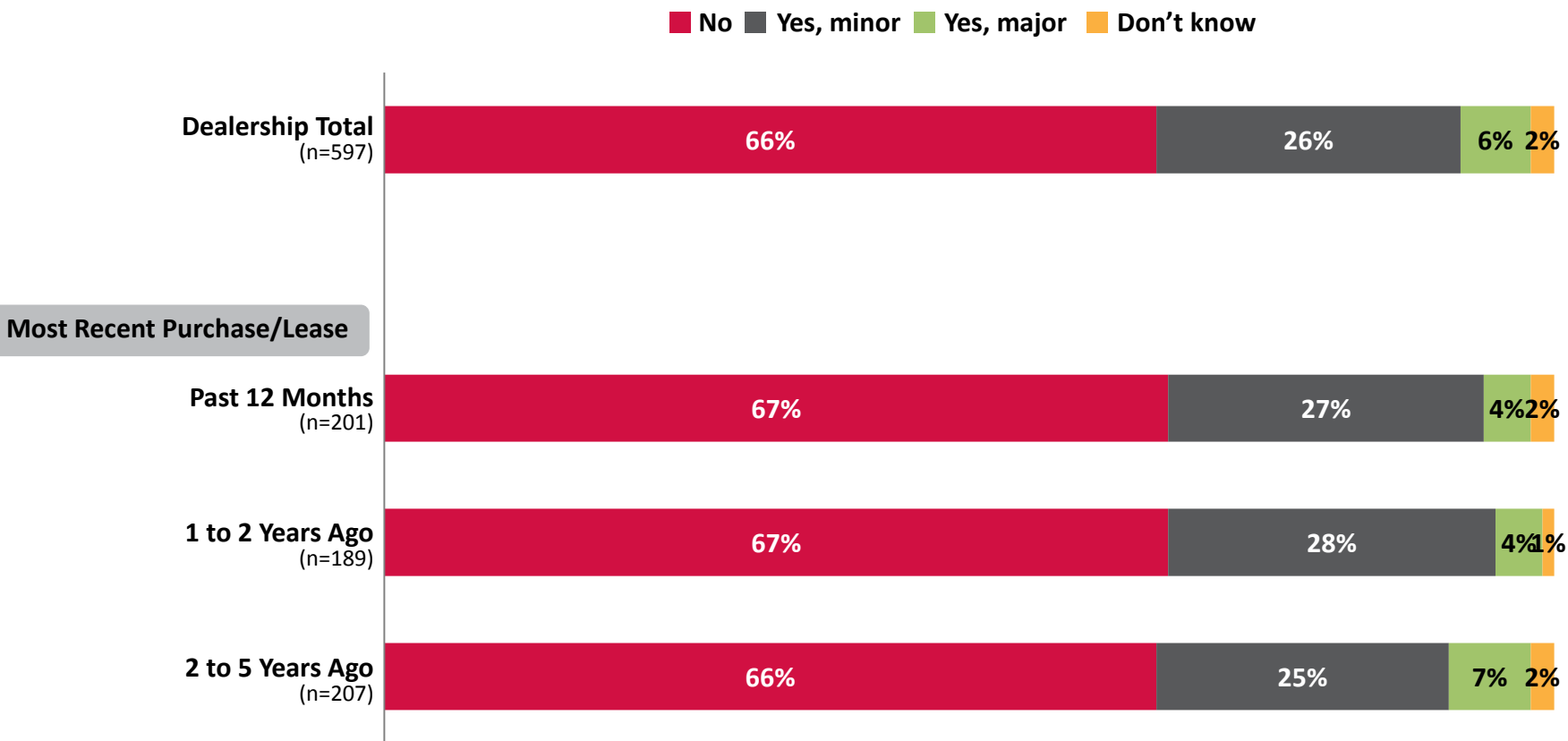
E11. When buying/leasing your most recent vehicle, did you receive a copy of the following documents?

Significantly higher than others within sub-group.
 Significantly lower than others within sub-group.

Experienced Issues/Problems/Concerns

Among those who purchased through a dealership

- Issues/problems experienced by those who bought their most recent vehicle through a dealership remain consistent across regions and over time. Roughly one-quarter have experienced a minor issue and six percent have experienced a major issue.
- In the 2008 survey conducted for the VSA, 35% of those who bought/leased through a dealership experienced a minor or major problem.



Most Recent Purchase/Lease

 Significantly higher than others within sub-group.
 Significantly lower than others within sub-group.

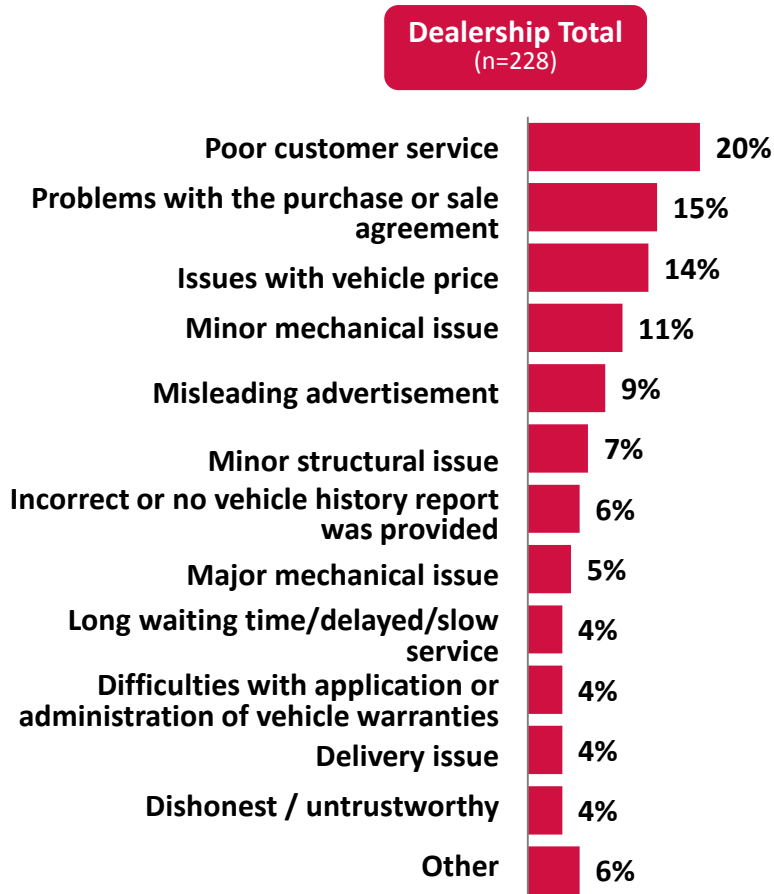
Base: Among those who bought/leased a vehicle through a dealership

E6a. When buying/leasing your most recent vehicle, did you experience any issues or problems or have any concerns with the dealership, salesperson, vehicle or purchasing/leasing process?

Unaided Issues/Problems/Concerns Experienced

Among those who purchased through a dealership

- On an unaided basis, the most common issue was poor customer service with specific mentions within this code being the salesperson was rude, pushy or disinterested. Other common mentions were related to the sales agreement, a minor mechanical issue or the vehicle price.
- Problems with the purchase or sale agreement and issues with the vehicle price were mentioned more often among those who bought 1-2 years ago compared to those who bought in the past 12 months.



*Small base size, interpret with caution. Note: Only Total responses of 4% or higher are shown.

Base: Among those who experienced issue/problem/concern when buying/leasing most recent vehicle

E7. Please describe the issue(s)/problem(s)/concern(s) you experienced when... your most recent vehicle.

Aided Issues/Problems/Concerns Experienced

Among those who experienced problem with dealership

- When prompted with a list of potential problems, one-quarter of buyers say their issue was due to the vehicle price and similar proportions mentioned poor customer service and minor mechanical issues.



Overall Incidence of Problems (Among those who bought/leased a vehicle in the past 5 years - dealership)

	8%
	8%
	7%
	5%
	4%
	3%
	3%
	2%
	2%
	2%
	2%
	2%
	1%
	1%
	1%
	-%
	-%
	-%
	1%

Note: Only other specifies of 2% or higher are shown.

Base: Among those who experienced issue/problem/concern when buying/leasing most recent vehicle through dealership (n=188)

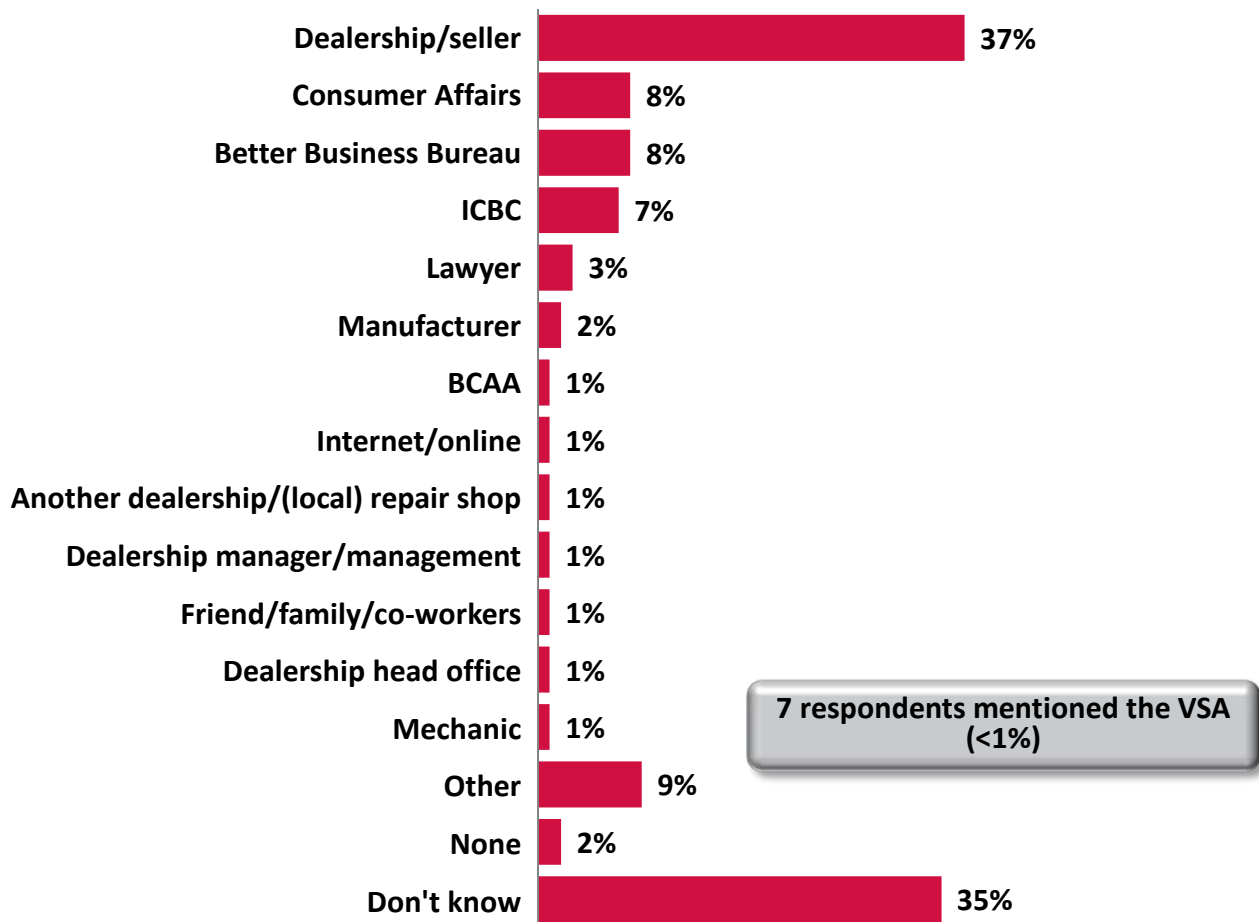
E8a. Which of following issues/problems/concerns, if any, did you personally experience?

Detailed Findings

VSA Awareness and Contact

Unaided Awareness of VSA

- Unaided awareness of the VSA as an organization to reach out to if a problem is experienced with the purchase/lease of a motor vehicle is very low. Although mentioned by several respondents, less than one percent in total mentioned the VSA.



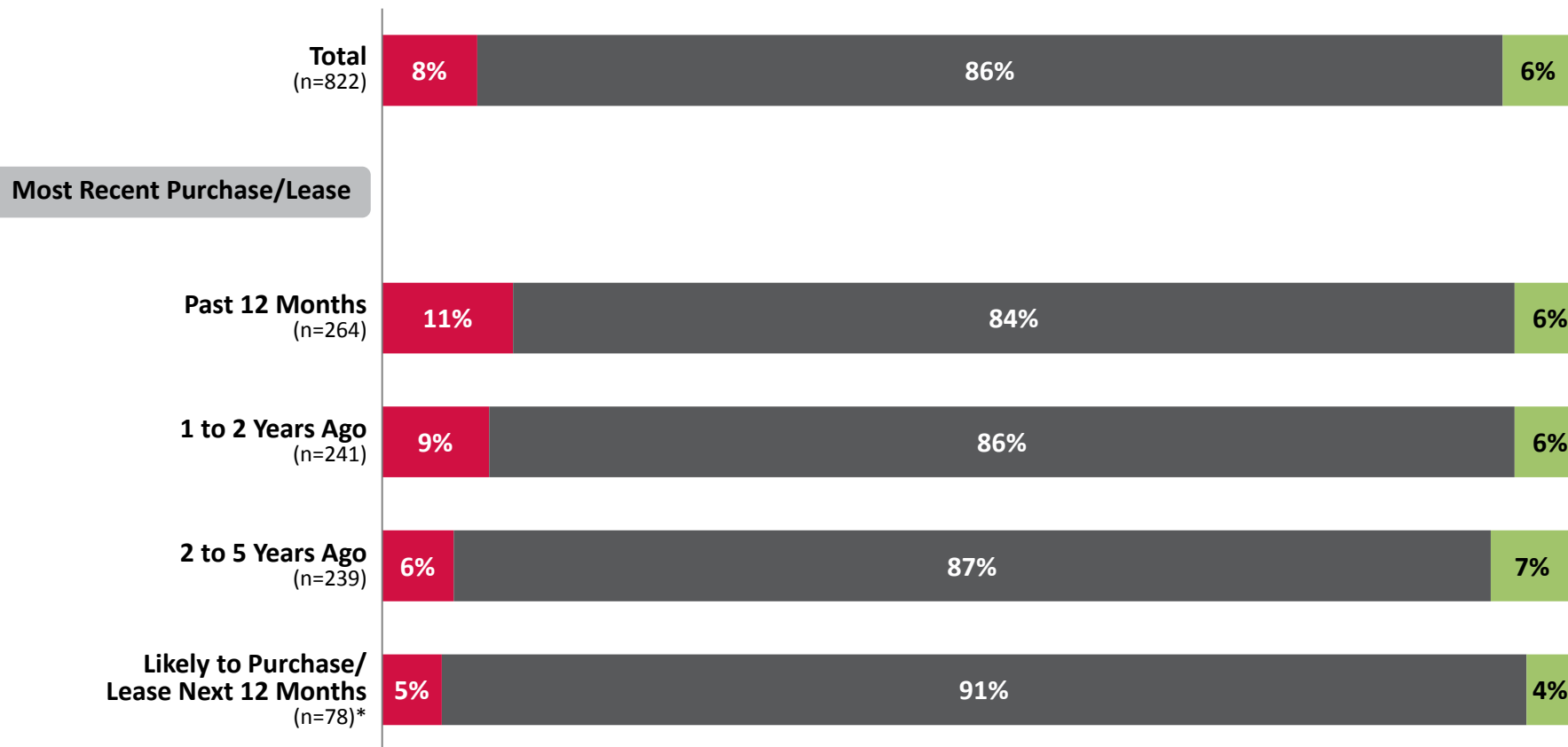
Base: All respondents (n=822)

F1. Changing the topic slightly, if you have a problem with the purchase or lease of a motor vehicle in BC where do you go?

Aided Awareness of VSA

- On an aided basis, awareness is up to 8% across all regions.
- The VSA's efforts to increase public awareness of the organization appear to be successful. Although not statistically significant, awareness has nearly doubled among those who bought/leased a vehicle in the past 12 months compared to those who bought/leased up to 5 years ago.

■ Yes ■ No ■ Don't know



 Significantly higher than others within sub-group.
 Significantly lower than others within sub-group.

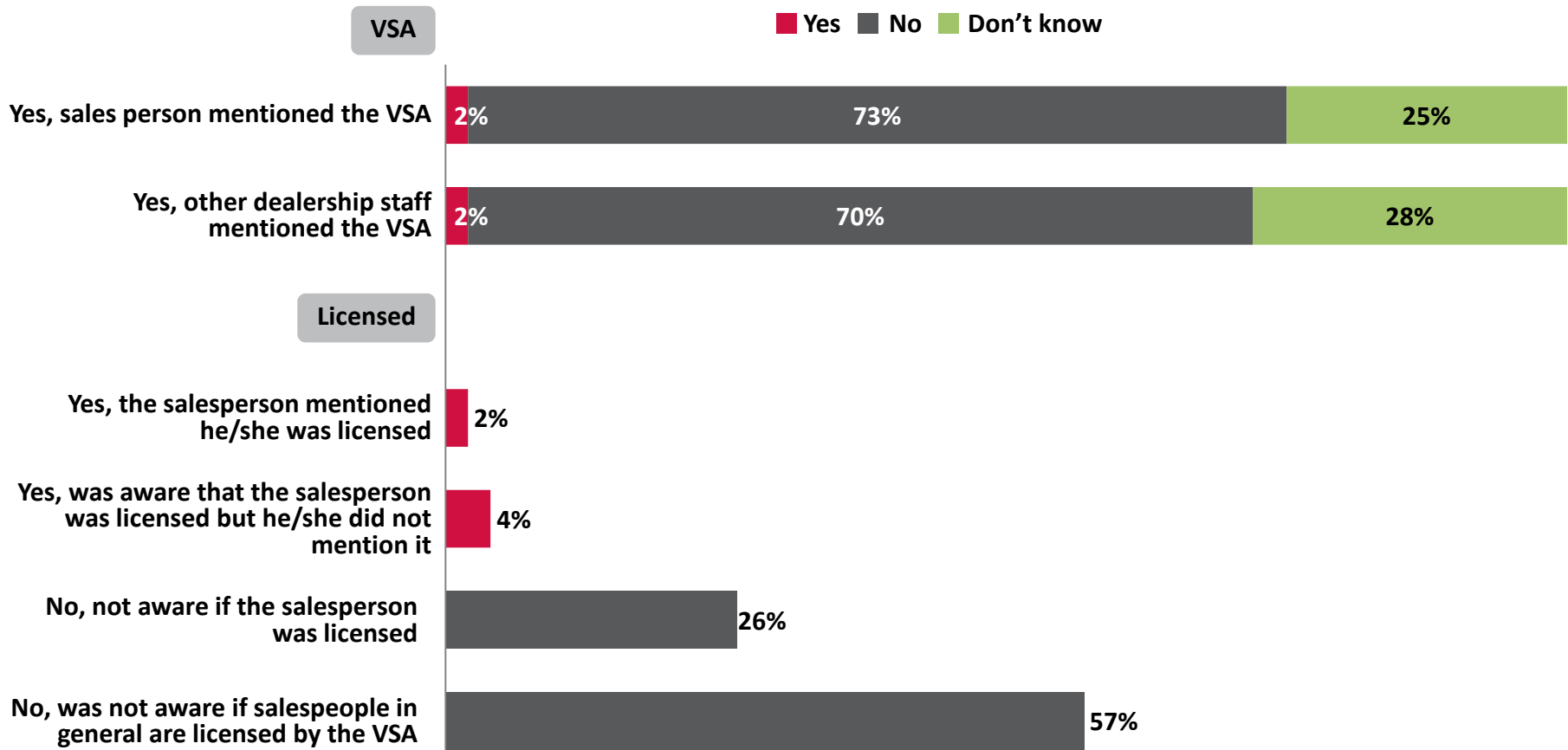
*Small base size, interpret with caution.

Base: All respondents

F2. As you may know, the Motor Vehicle Sales Authority of British Columbia (VSA) is a not-for-profit organization and an administrative authority delegated by the provincial government of BC. The VSA is responsible for the administration and enforcement of various acts relating to the sale of motor vehicles (e.g. the Motor Dealer Act). Before now, were you aware of the VSA?

Dealership Salesperson Mention VSA/Licensed by VSA

- Salespeople and dealership staff do not appear to be spreading the word about the VSA. Only 2% say that one of these groups mentioned the VSA during their most recent purchase.
- The majority of vehicle buyers are not aware that salespeople in general are licensed by the VSA, nor were they aware that the salesperson they dealt with was licensed.



Base: Among those who bought/leased a new vehicle in the past 5 years at a dealership (n=597)

F3. When buying/leasing your most recent vehicle from a dealer, did the salesperson mention the VSA in any way (for example, mention that he/she is licensed by the VSA)?

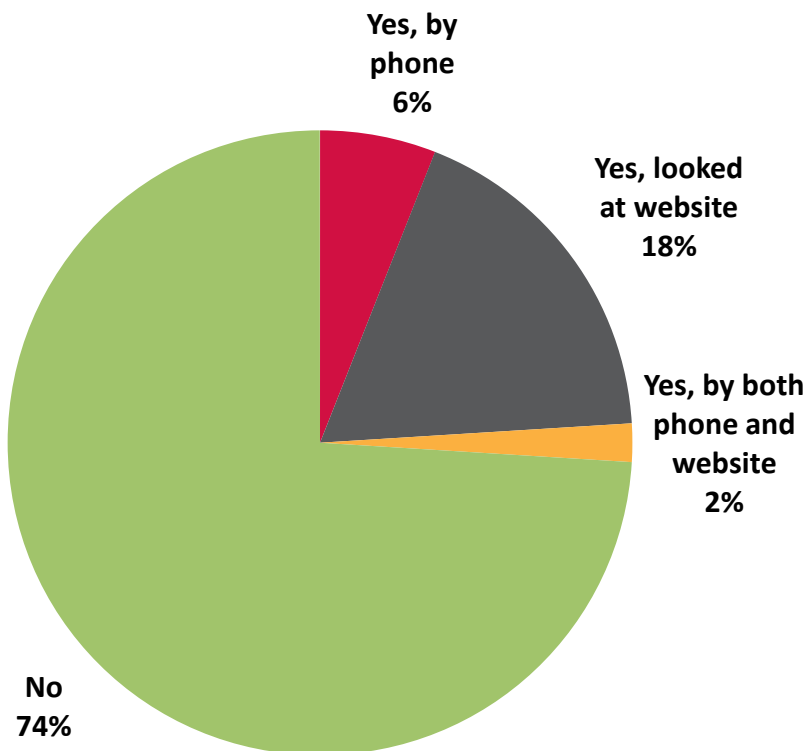
F4. Apart from the salesperson, did any other dealership staff mention the VSA (for example, did anyone mention or was there display information indicating that the dealership is licensed by the VSA)?

F5. As you may know, the VSA licenses dealers and salespeople in the motor vehicle sales industry. When buying/leasing your most recent vehicle, were you aware (not assumed, but were actually aware) if the salesperson was licensed by the VSA?

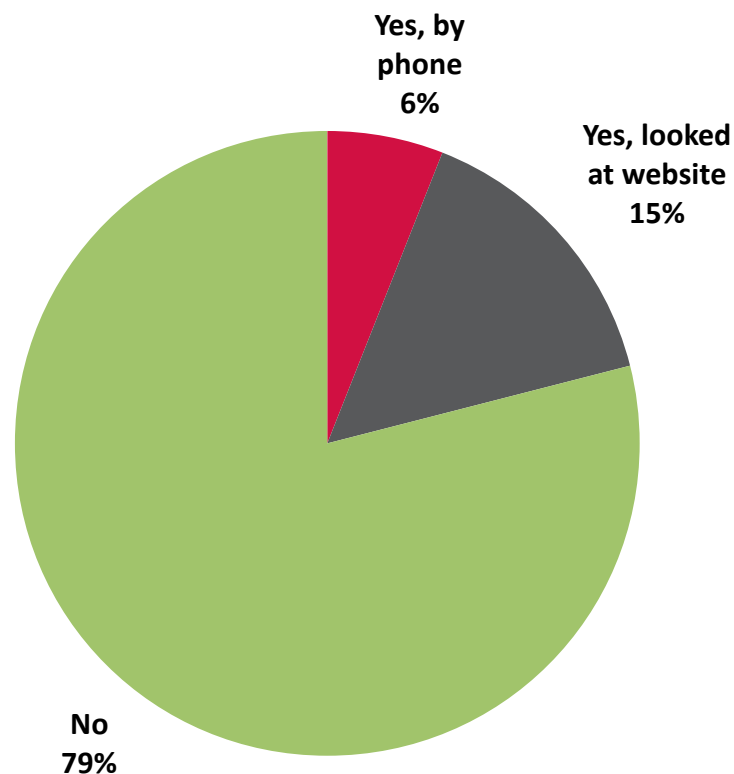
Contact with VSA

- Among those past 5 year buyers who are aware of the VSA, roughly one-quarter contacted the organization in some manner prior to making their purchase. Please note the base size for this analysis is very small and results should be interpreted with caution.
- One-in-five of these buyers contacted the VSA in some form after buying or leasing their vehicle.

Prior to Buying/Leasing Vehicle



After Buying/Leasing Vehicle



**Very small base size, interpret with extreme caution.

Base: Among those who bought/leased a new vehicle in the past 5 years and are aware of the VSA (n=48)**

G1. Did you contact the VSA prior to buying/leasing your most recent vehicle?

G2. Did you contact the VSA after buying/leasing your most recent vehicle?

Appendix 1:

Margin of Error

Margin of Error

- The following table details the breakdown of the sample and associated margin of error (nineteen times out of twenty) for all respondents and for the various subgroups.

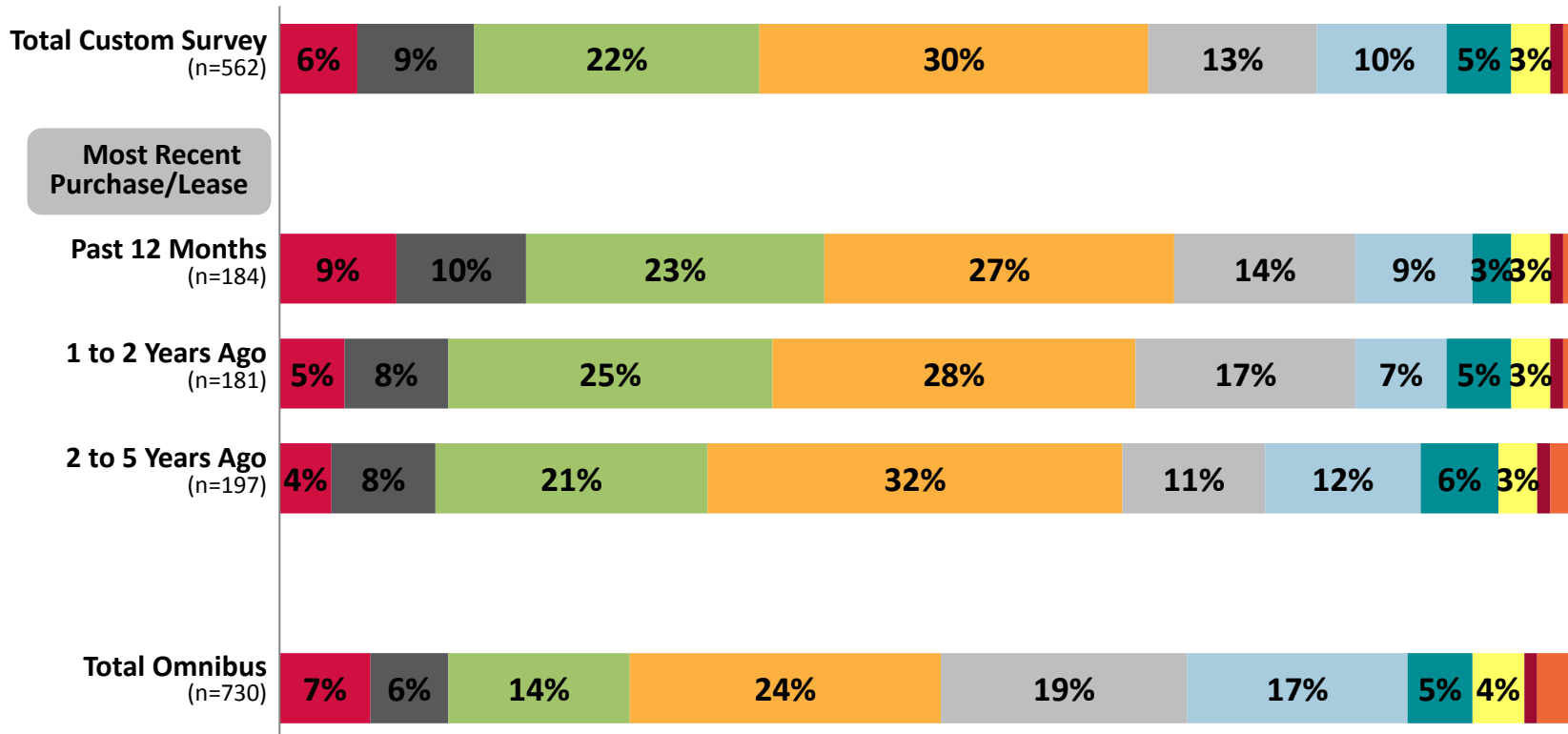
	Sample	Margin of Error
Total respondents	822	±3.42%
Most Recent Purchase/Lease Subgroups:		
Past 12 month buyer/lesser	264	±6.03%
13 months to 1 to 2 years ago	241	±6.31%
Just over 2 years to 5 years ago	239	±6.34%
Not past buyer/lesser but very likely in next 12 months	78	±11.10%
Regional Subgroups:		
Lower Mainland	428	±4.74%
Other Urban BC	190	±7.11%
Rest of BC	204	±6.86%

Appendix 2:

Confidence in the Motor Vehicle
Sales Industry & Rating of Most
Recent Purchase Experience

Confidence in the Motor Vehicle Sales Industry

■ Rated 10, Extremely confident
 ■ Rated 9
 ■ Rated 8
 ■ Rated 7
 ■ Rated 6
■ Rated 5
 ■ Rated 4
 ■ Rated 3
 ■ Rated 2
 ■ Rated 1, Not at all Confident



 Significantly higher than others within sub-group.
 Significantly lower than others within sub-group.

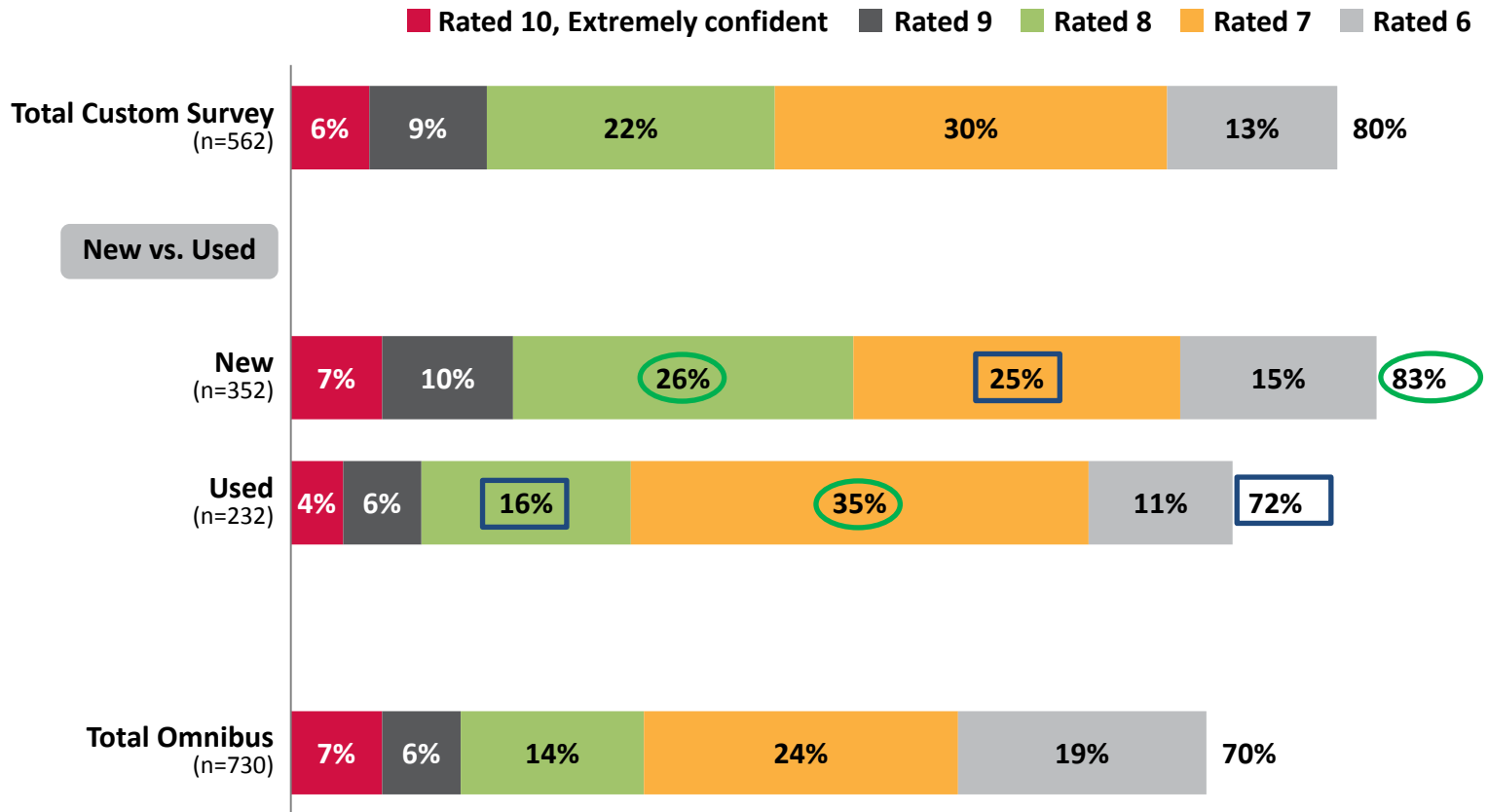
Base: All British Columbia Respondents & Among those who bought/leased a vehicle through a dealership, excluding don't know

C3. Overall, excluding private sales, how confident are you in the motor vehicle sales industry in BC? Where 1 = not at all confident and 10= extremely confident

Confidence in the Motor Vehicle Sales Industry

New vs. Used Vehicle Purchasers at Dealerships

- Confidence in the motor vehicle sales industry is higher among those who purchased a new vehicle compared to those who purchased a used vehicle through a dealership.



Significantly higher than others within sub-group.
 Significantly lower than others within sub-group.

Base: All British Columbia Respondents & Among those who bought/leased a vehicle through a dealership, excluding don't know

C3. Overall, excluding private sales, how confident are you in the motor vehicle sales industry in BC? Where 1 = not at all confident and 10= extremely confident

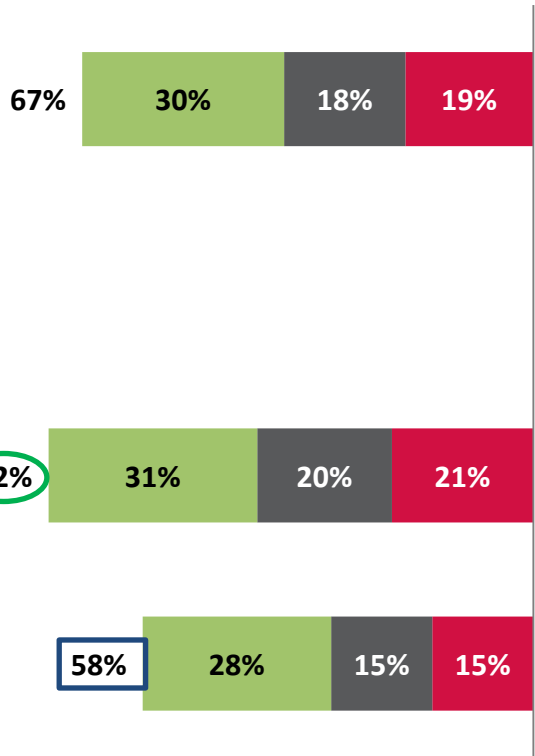
Overall Rating of Purchase/Lease Experience & Salesperson

Among those who bought/leased through a dealership

- Overall vehicle purchase/lease experiences in BC are positive. Two-thirds of most recent buyers/lesors gave positive ratings of 8,9, or 10 on a 10 point scale where 10 means excellent. Ratings over time, for the overall experience and the salesperson, have improved significantly for those who bought their most recent vehicle in the past 12 months (71%) compared to those who bought 2 to 5 years ago (62%). There were no regional differences.

Overall Experience

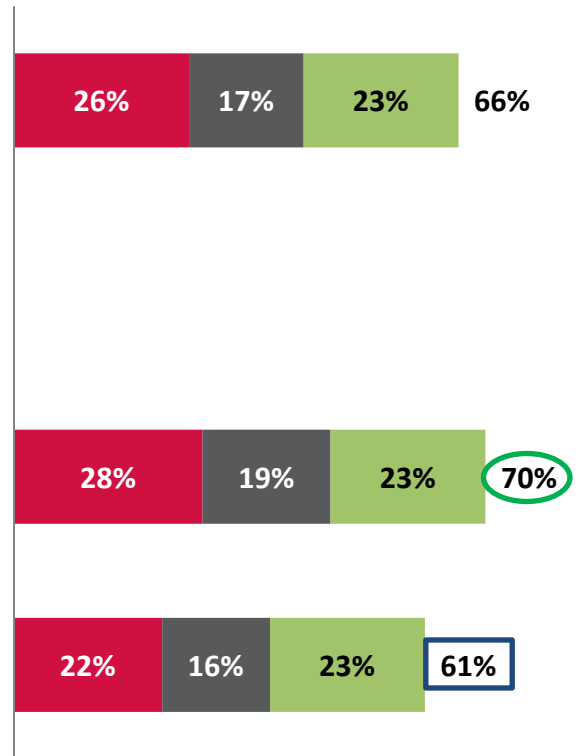
Rated 8 ■ Rated 9 ■ Rated 10 – Excellent ■



Salesperson

Rated 10 – Excellent ■ Rated 9 ■ Rated 8 ■

New vs. Used



72% Significantly higher than others within sub-group.
58% Significantly lower than others within sub-group.

Base: Among those who bought/leased a vehicle through a dealership

C1. Still thinking of the last time you bought/leased a vehicle from a dealership, please rate your vehicle purchasing/leasing experience overall.

C2. Please rate your experience overall with the salesperson who sold you the vehicle.

Appendix 3:

Dealership Experience



Received Vehicle Documentation



Among those who purchased through a dealership

	% Yes		
	Most Recent Purchase/Lease		
	Past 12 Months (n=varies)	1 to 2 Years Ago (n=varies)	2 to 5 Years Ago (n=varies)
Vehicle registration	94%	95%	96%
Sale or purchase agreement/contract	94%	96%	97%
Warranty information	85%	84%	87%
Deposit receipt or agreement	79%	85%	82%
Worksheet or initial offer form completed with a salesperson	64%	74%	66%
ICBC tax transfer form	66%	64%	63%
Finance agreement	64%	60%	56%
Accident history report	69%*	52%*	44%*
Mechanical condition report*	79% *	87% *	**
Lease agreement**	**	**	**

*Small base size, interpret with caution; **Base size too small to be shown.

Base: Among those who bought/leased a used vehicle in the past 5 years through a dealer

E11. When buying/leasing your most recent vehicle, did you receive a copy of the following documents?

 Significantly higher than others within sub-group.
 Significantly lower than others within sub-group.

Unaided Issues/Problems/Concerns Experienced

Among those who purchased through a dealership

	Region		Most Recent Purchase/Lease		
	Lower Mainland (n=104)	All other BC (n=84)	Past 12 Months (n=61)*	1 to 2 Years Ago (n=61)*	2 to 5 Years Ago (n=66)*
Poor customer service	20%	14%	22%	13%	21%
Problems with the purchase or sale agreement	16%	14%	6%	19%	17%
Issues with vehicle price	11%	19%	8%	21%	13%
Minor mechanical issue	12%	9%	13%	8%	12%
Misleading advertisement	7%	11%	13%	9%	7%
Minor structural issue	5%	11%	5%	10%	7%
Incorrect or no vehicle history report was provided	8%	1%	7%	5%	5%
Major mechanical issue	6%	4%	5%	4%	6%
Long waiting time/delayed/slow service	4%	3%	5%	2%	5%
Difficulties with application or administration of vehicle warranties	3%	5%	7%	4%	3%
Delivery issue	4%	6%	3%	7%	4%
Dishonest /untrustworthy	2%	6%	3%	4%	4%
Other	3%	11%	6%	7%	5%

*Small base size, interpret with caution. Note: Only Total responses of 4% or higher are shown.

Base: Among those who experienced issue/problem/concern when buying/leasing most recent vehicle

E7. Please describe the issue(s)/problem(s)/concern(s) you experienced when... your most recent vehicle.

Significantly higher than others within sub-group.

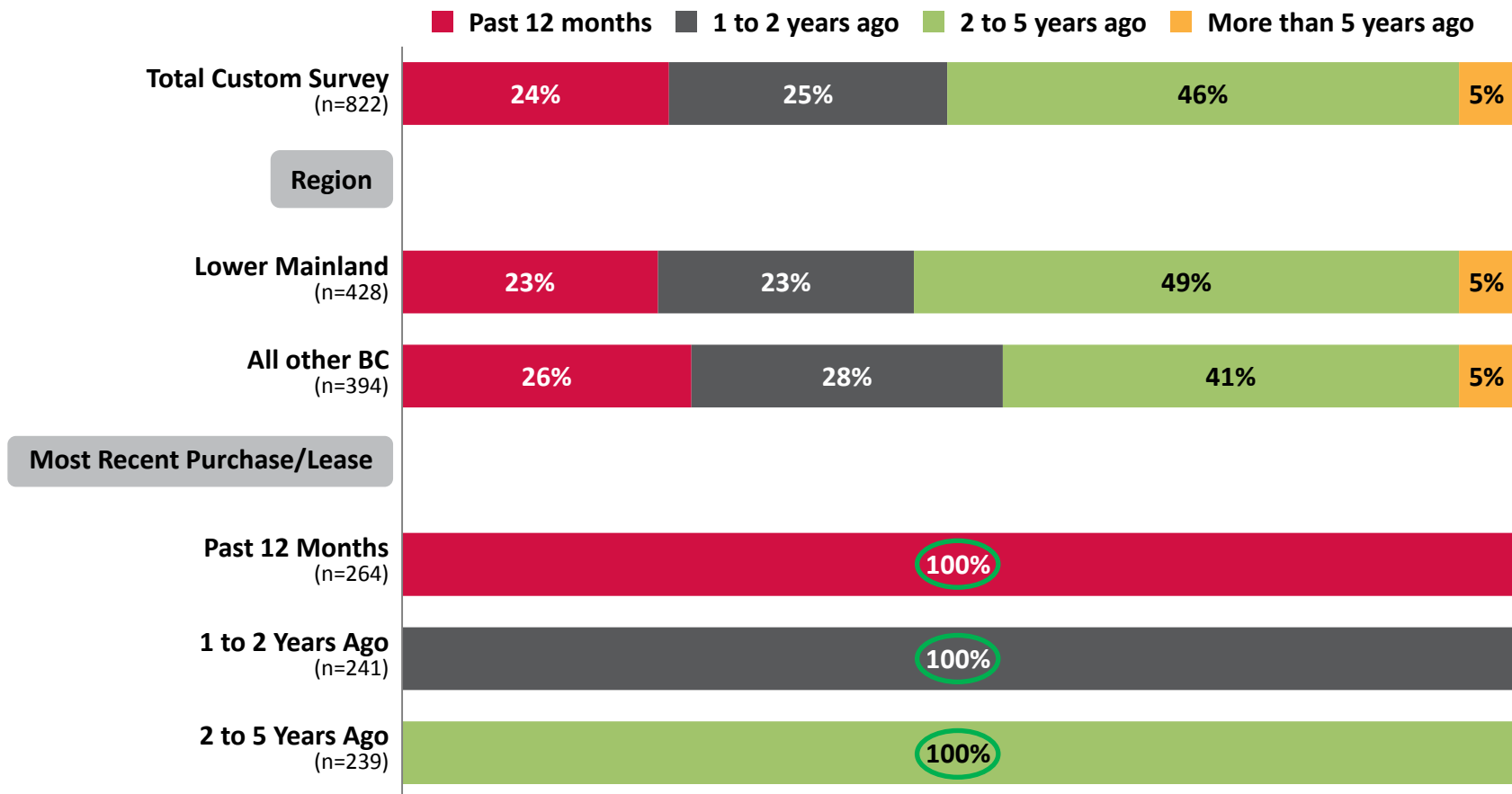
Significantly lower than others within sub-group.

Appendix 4:

Most Recent Purchase Profile

Most Recent Purchase Timeframe

- The subgroups by timeline of most recent vehicle buyers in the study were weighted to reflect the actual proportion of most recent vehicle purchases in the past 5 years based on the BC omnibus data.
- Overall, one-quarter of most recent vehicle buyers/leasers bought a vehicle in the past 12 months, another quarter bought/leased 1-2 years ago and just under half bought or leased a vehicle 2-5 years ago.



Significantly higher than others within sub-group.
 Significantly lower than others within sub-group.

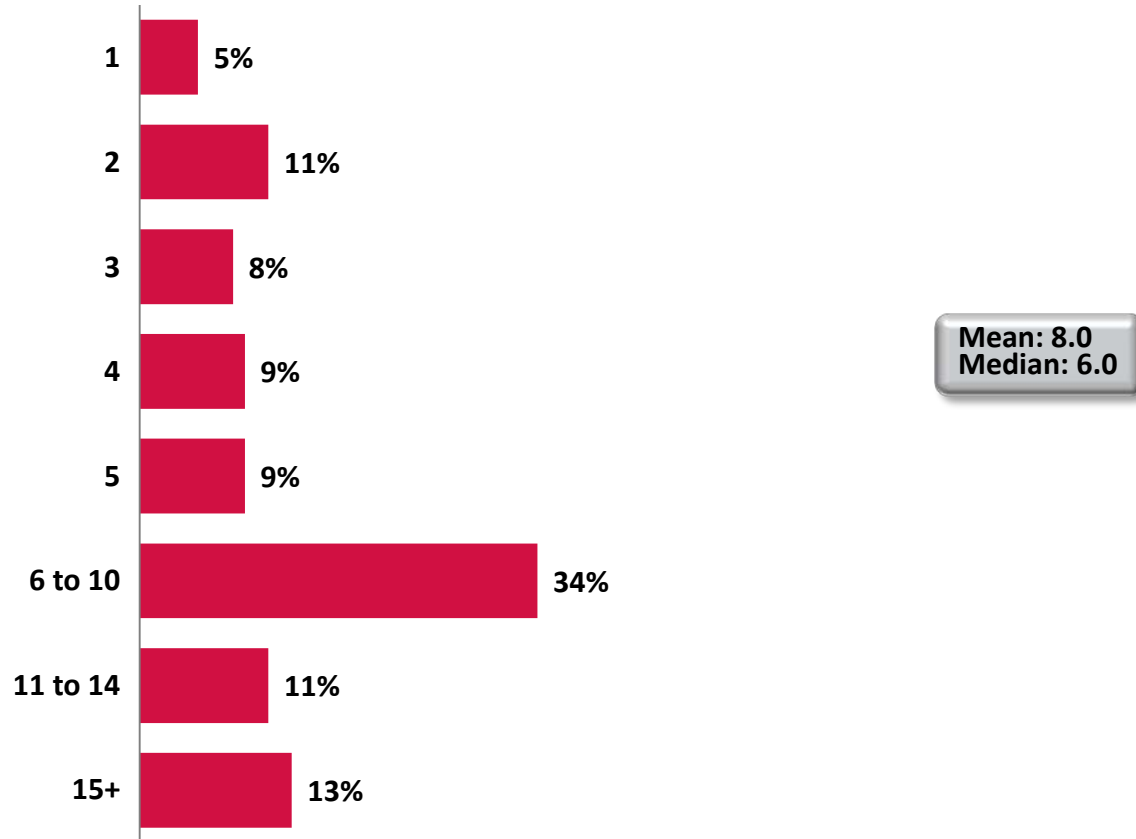
*Small base size, interpret with caution. 3% have never bought a vehicle before.

Base: All respondents

S3. When was the last time you bought or leased a new or used vehicle (including private sales)? Vehicles can refer to new and used automobiles, light trucks, recreation vehicles and motorcycles.

Number of Vehicles Ever Bought/Leased

- On average, vehicle buyers have an average of 8 vehicles in their lifetime. One-third of past 5 year buyers have bought between 6-10 vehicles.
- There are no differences by region or recency of having made a vehicle purchase.

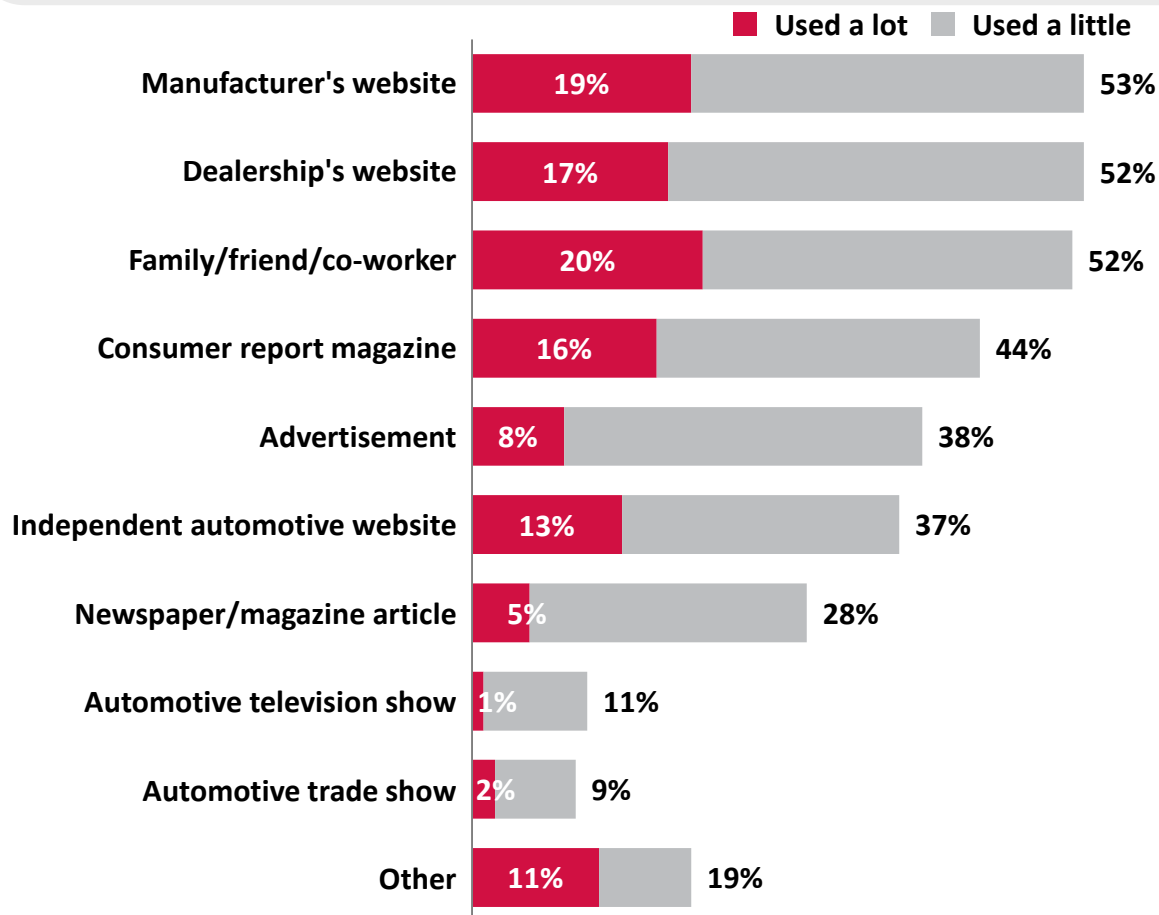


Base: Among those who bought/leased a vehicle in the past 5 years, excluding don't know (n=776)

A2. How many vehicles have you ever bought or leased (including private sales)?

Sources Used to Aid Buying/Leasing Decision

- Websites, both the manufacturer's and the dealers, and personal connections are the most commonly used sources of information when choosing where to buy or lease a vehicle.
- Those who bought a vehicle in the past 2 years were more likely to use a manufacturer's (59%), a dealership's (57%) or an independent automotive website (46%) compared to those who bought 2-5 years ago (48%, 47% and 27% respectively).
- Residents of the lower mainland were more likely to use websites (a manufacturer's – 58% vs. 46% for other regions, dealership's – 56% vs. 46% for other regions) newspaper or magazine articles (33% compared to 20% on average for other regions), or an automotive trade show (13% vs. 4% for other regions).



Base: Among those who bought/leased a vehicle in the past 5 years (n=744)

B1. How much, if at all, did you use the following sources to help you decide where to buy/lease?

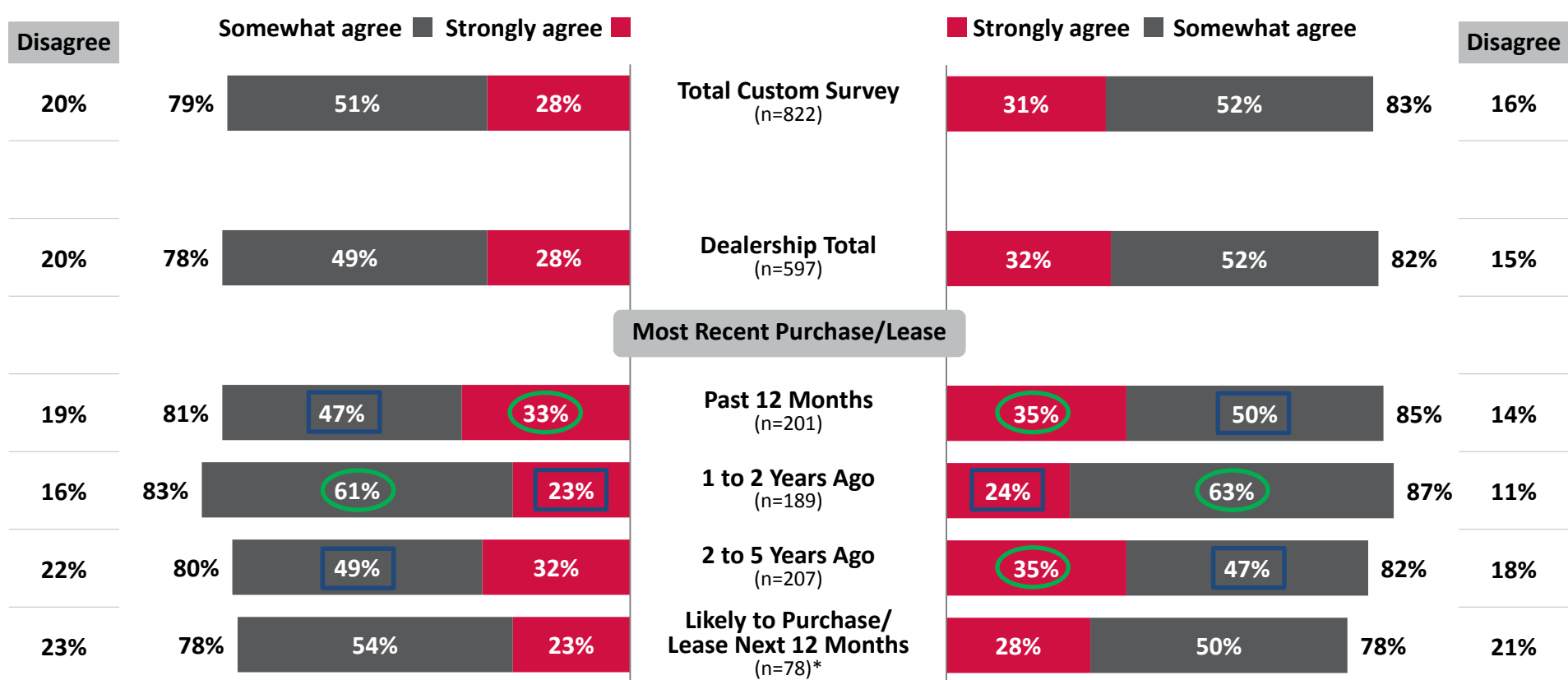
Attitudes to Vehicle Buying/Leasing Process

Among those who purchased at a dealership

- Overall, British Columbians who bought a vehicle in the past 5 years agree that they feel confident and well informed when buying/leasing a vehicle.
- Those who bought/leased a vehicle in the past 12 months are more likely to agree strongly that they feel confident and well informed when it comes to buying/leasing a vehicle compared to those who bought a vehicle more than 12 months ago.

Feel Confident

Feel Well Informed



 Significantly higher than others within sub-group.
 Significantly lower than others within sub-group.

*Small base size, interpret with caution.

Base: All respondents

Z1. Please indicate how much you personally agree or disagree with the following statements.

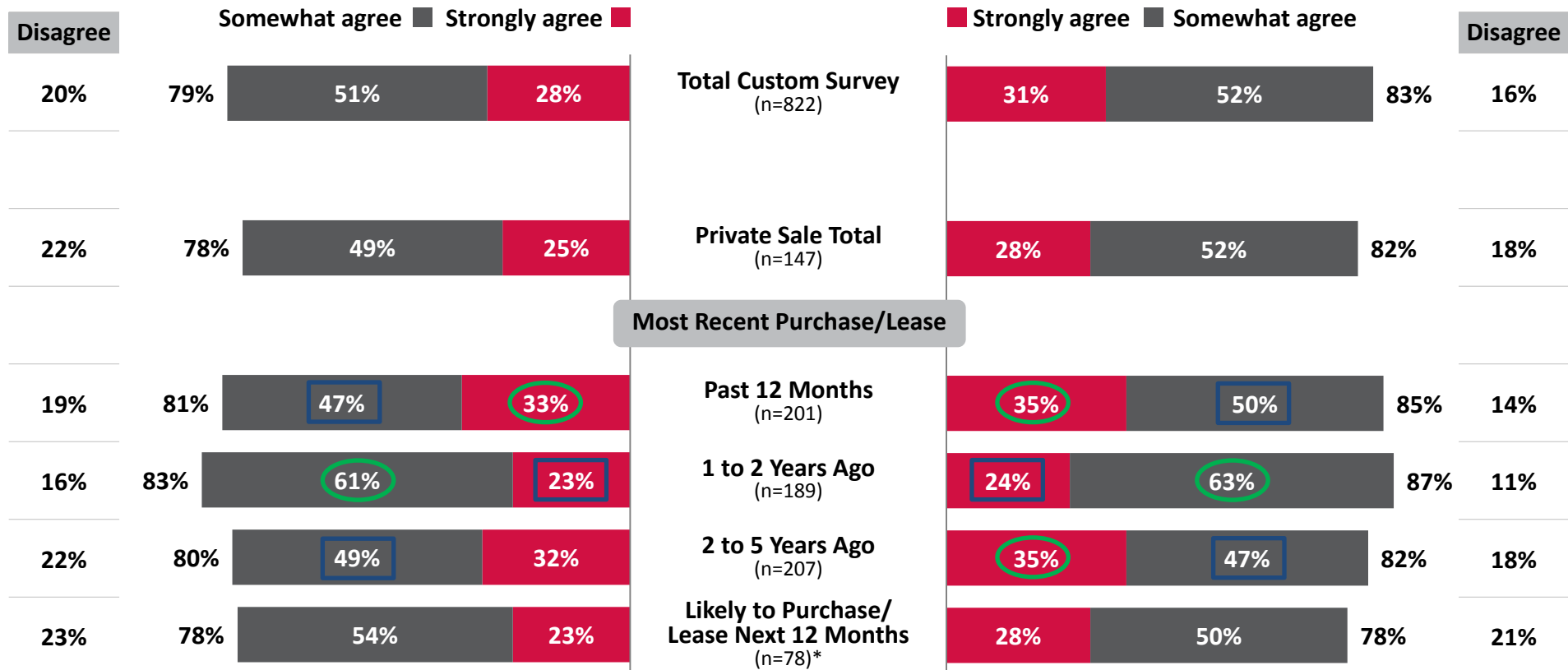
Attitudes to Vehicle Buying/Leasing Process

Among those who purchased through a private sale

- Overall, British Columbians who bought a vehicle in the past 5 years agree that they feel confident and well informed when buying/leasing a vehicle.
- Those who bought/leased a vehicle in the past 12 months are more likely to agree strongly that they feel confident and well informed when it comes to buying/leasing a vehicle compared to those who bought a vehicle more than 12 months ago.

Feel Confident

Feel Well Informed



 Significantly higher than others within sub-group.
 Significantly lower than others within sub-group.

*Small base size, interpret with caution.

Base: All respondents

Z1. Please indicate how much you personally agree or disagree with the following statements.

Appendix 5:

Demographic Profile

	B.C. Omnibus (n=851)	Total (n=822)
Gender		
Male	49%	52%
Female	51%	49%
Age		
18 to 34	29%	12%
35 to 54	39%	42%
55+	32%	45%
Marital Status		
Married/living with a partner	–	70%
Single	–	15%
Divorced/separated	–	10%
Widowed	–	3%
I am not comfortable answering	–	1%
Education		
Graduated high school or less	25%	15%
Some college/CEGEP/trade school but did not finish	15%	12%
Graduated from college/CEGEP/trade school	21%	24%
Some university, but did not finish	10%	12%
University undergraduate degree, such as a Bachelor's Degree	21%	24%
University graduate degree, such as a Master's or PhD	8%	13%

Please note: BC Omnibus data is representative of the BC population based on 2011 Census Data.

Base: All respondents

Demographic Profile (cont.)

	B.C. Omnibus (n=851)	Total (n=822)
Employment Status		
Employed full-time	–	44%
Employed part-time	–	10%
Self-employed, own/operate home-based business	–	7%
Self-employed, own/operate business at another location	–	3%
Homemaker	–	5%
Student	–	2%
Retired	–	25%
Currently unemployed	–	4%
Household Income		
Less than \$40,000	–	13%
\$40,000 to \$79,999	–	26%
\$80,000 to \$124,999	–	26%
\$125,000 +	–	14%
Prefer not to answer	–	20%



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