

AWARENESS AND KNOWLEDGE OF THE VEHICLE SALES AUTHORITY IN BC

Ipsos BC Omnibus Research
Report

May 15, 2024



Research Objective & Approach



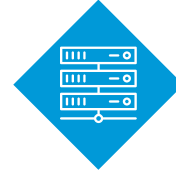
VSA's key research objectives are as follows:

- To assess the level of VSA awareness among British Columbians in comparison to other BC vehicle organizations.
- To evaluate perceived favorability among individuals aware of VSA and compare it with VSA competitors.
- To gain insight into the general perception of VSA's purposes and the extent of public awareness of VSA's online services.



Method

- Ipsos BC Omnibus English only



Data Collection

- May 7 to May 12, 2024



Respondent Qualifications

- General population, 18+



Sample Size

- n=800
- Sample was weighted based to the general population based on age, gender and region

KEY INSIGHTS

1 KEY BRAND METRICS ARE HIGHER AMONG YOUNGER COHORTS

Awareness and familiarity levels of the VSA are on par with other organizations such as the New Car Dealers Association of BC (NCDCA) and the Automotive Retailers Association of BC (ARA). Awareness, familiarity and favourability are all higher among men, younger cohorts, and past 5 year vehicle purchasers.

2 LIMITED KNOWLEDGE OF THE VSA AFFECTS FAVOURABILITY

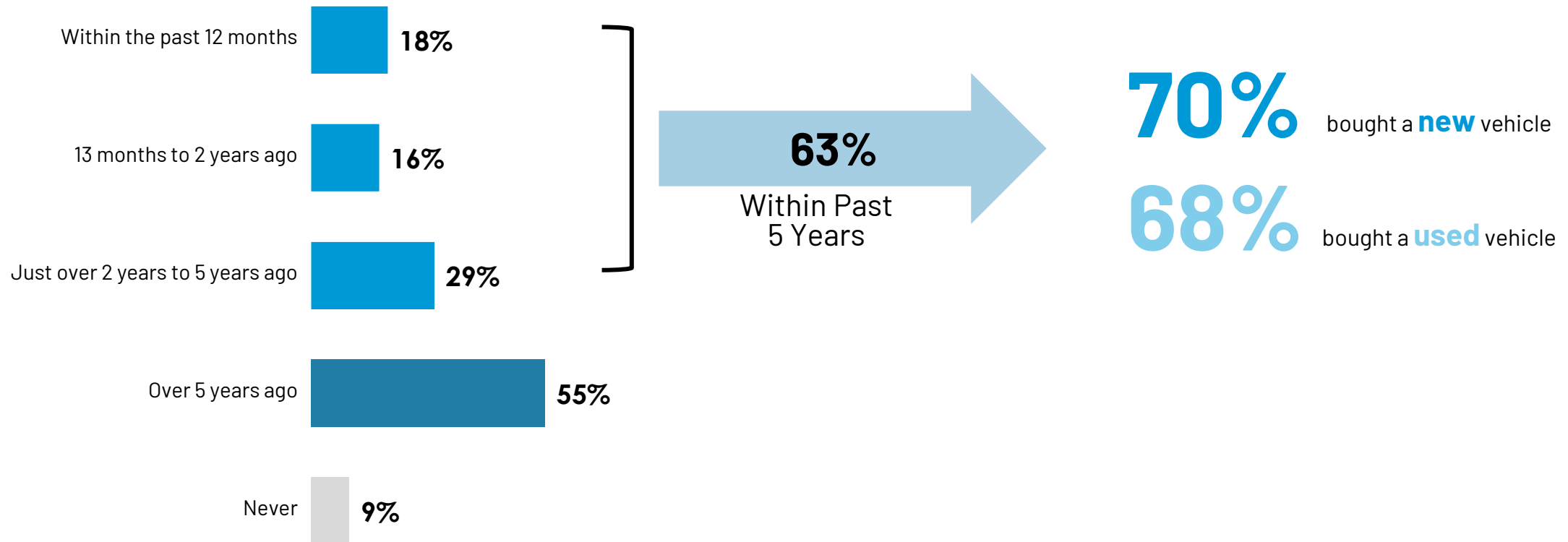
The majority of the BC population (**53%**) remain neutral, neither favourable nor unfavourable toward the VSA, suggesting a considerable portion of vehicle consumers lack sufficient knowledge of the organization to have an opinion.

3 OPPORTUNITY FOR INCREASED COMMUNICATIONS ON VSA SERVICES

Of those who are aware of VSA, **45%** hold misconceptions or lack awareness regarding VSA's purpose and **38%** are unaware of the specific services it provides. Among those who visited a dealership within the past 12 months, one-in-three recall encountering the VSA logo or Code of Conduct.

63% of British Columbians purchased at least one vehicle within the past 5 years, with an equal proportion buying new and used vehicles.

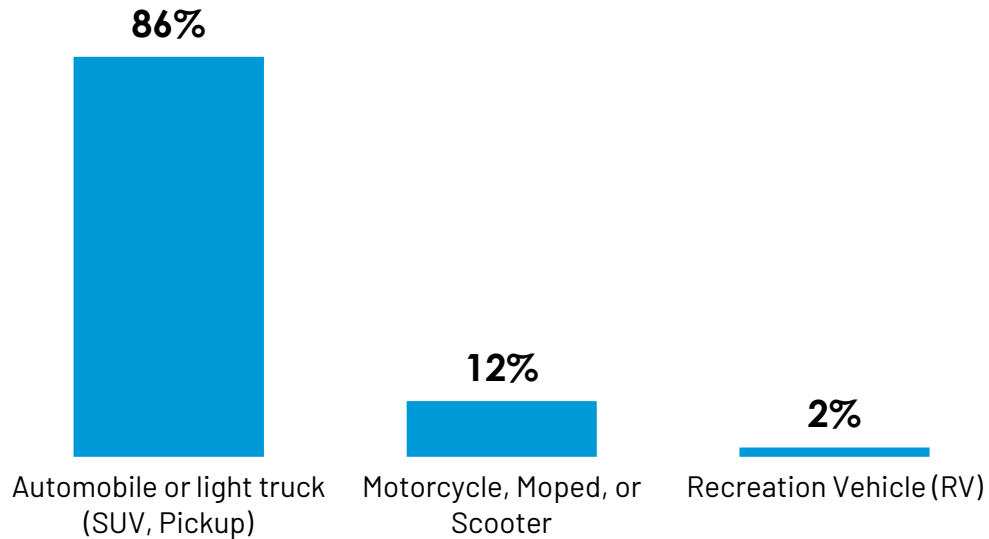
VEHICLE PURCHASE



Q1. When was the last time you bought or leased a new or used vehicle (including private sales)? Vehicles refer to new and used automobiles, light trucks, recreation vehicles and motorcycles.
Base: All respondents (n=800), Past 5 year Vehicle Purchasers (n=467)

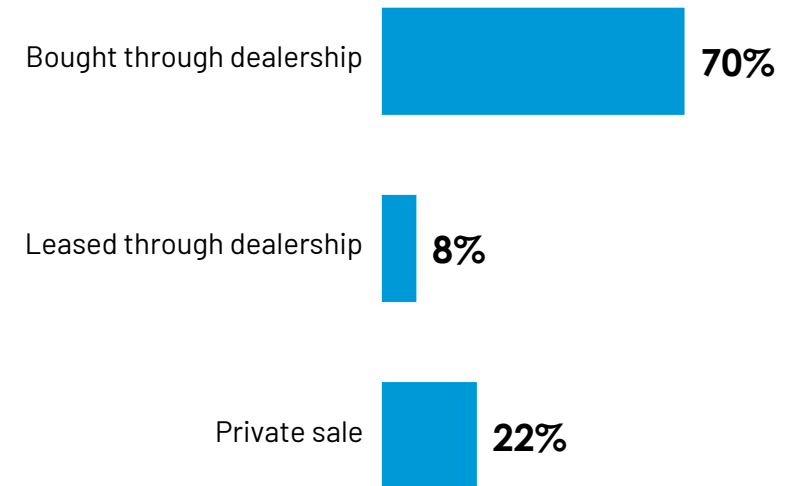
Automobiles and light trucks (SUVs, pickups) are the most common vehicles purchased, with the vast majority having bought through dealerships.

TYPE OF VEHICLE PURCHASED



Q2. What type of vehicle did you purchase most recently? Select one.
Base: All respondents (n=800)

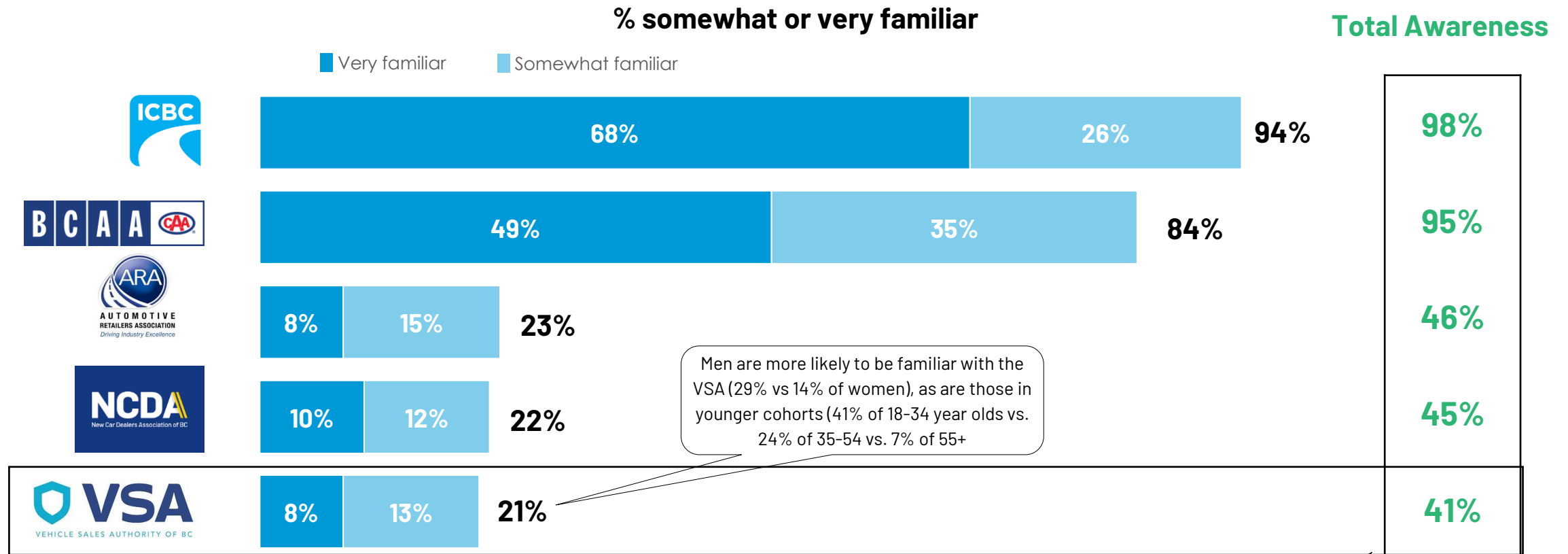
WHERE DID THEY BUY?



Q3. Did you buy or lease your most recent vehicle through a dealership or was it a private sale?
Base: All respondents (n=800)

21% of British Columbians report being at least somewhat familiar with the VSA with another 20% saying they have heard the name - similar proportions to the ARA and NCDA.

AWARENESS AND FAMILIARITY – TOTAL

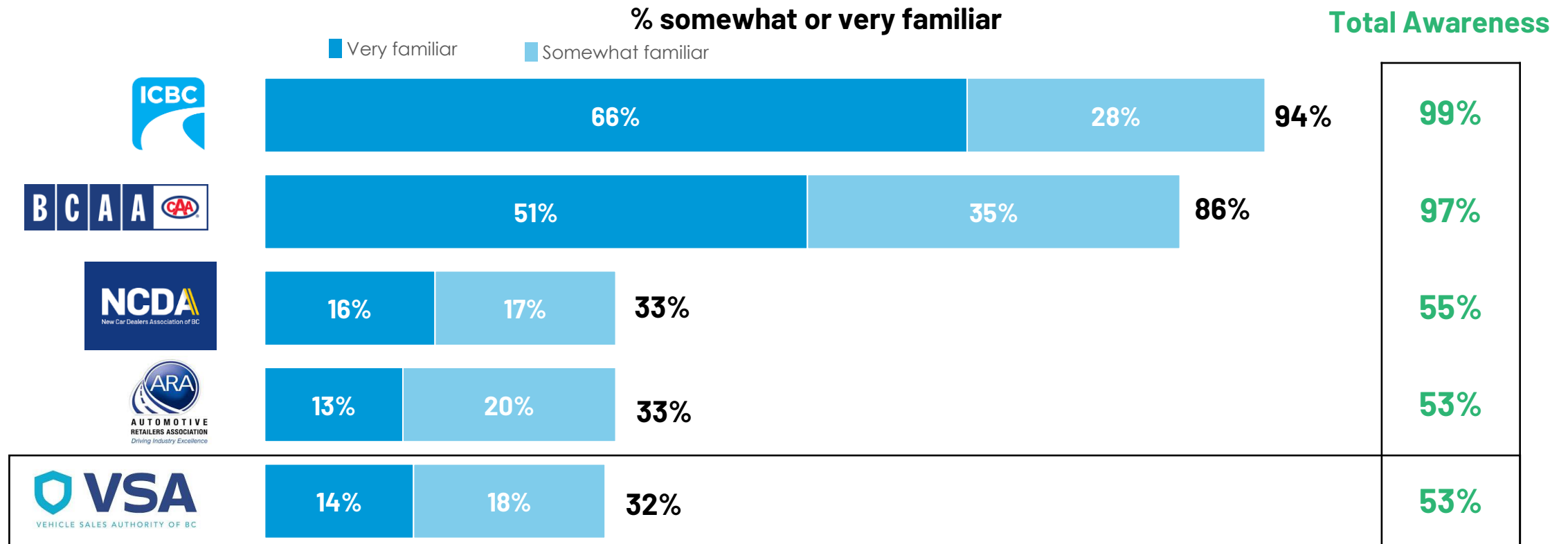


Q4. How familiar, if at all, are you with each of the following organizations? Response options: very familiar, somewhat familiar, have only heard the name, never heard before today
Base: All respondents (n=varies across organizations)

Men are more likely to be aware of the VSA (48% vs 36% of women), as are those in younger cohorts (60% of 18-34 year olds vs. 45% of 35-54 vs. 27% of 55+)

Awareness of the VSA rises to just over half of P5Y vehicle purchasers with one-third of purchasers saying they have at least some familiarity with the organization.

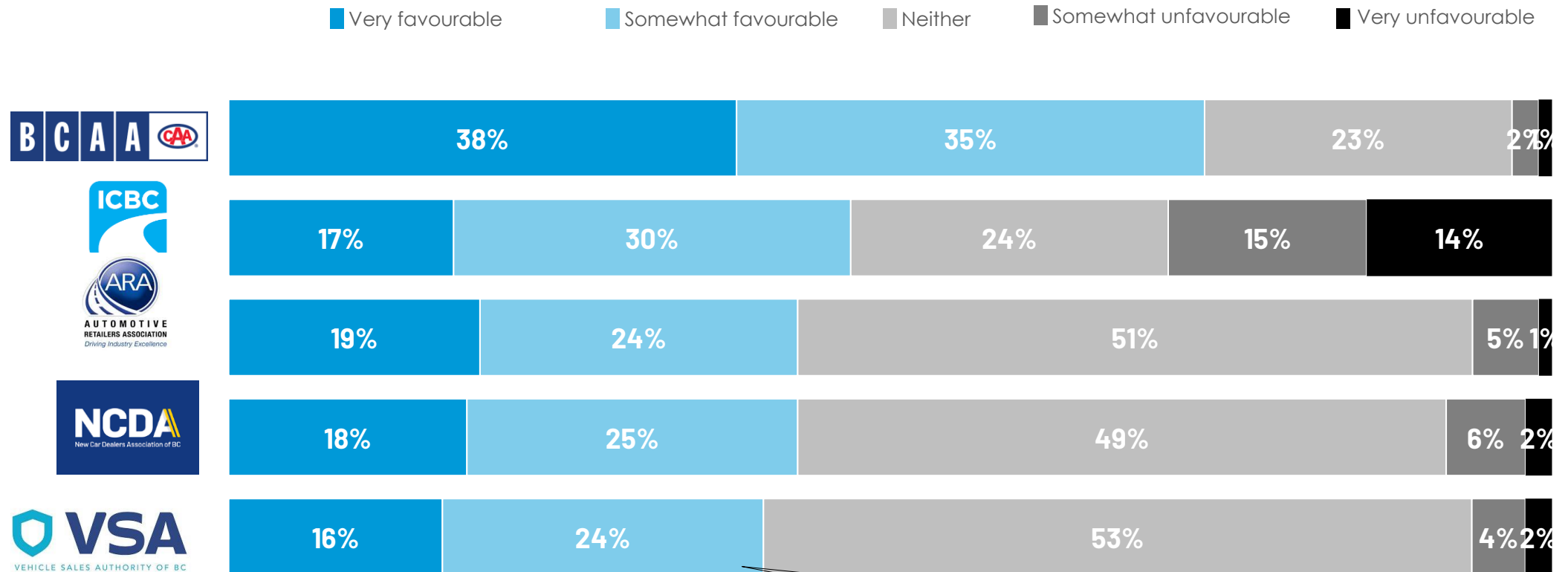
AWARENESS AND FAMILIARITY – PAST 5 YEAR PURCHASER



Q4. How familiar, if at all, are you with each of the following organizations? Response options: very familiar, somewhat familiar, have only heard the name, never heard before today
 Base: Past 5 Year Vehicle Purchasers (n=varies across organizations)

BCAA is leading in favourability among British Columbians, while VSA ranks at the bottom of the set, largely due to respondents having no impression.

FAVOURABILITY - TOTAL

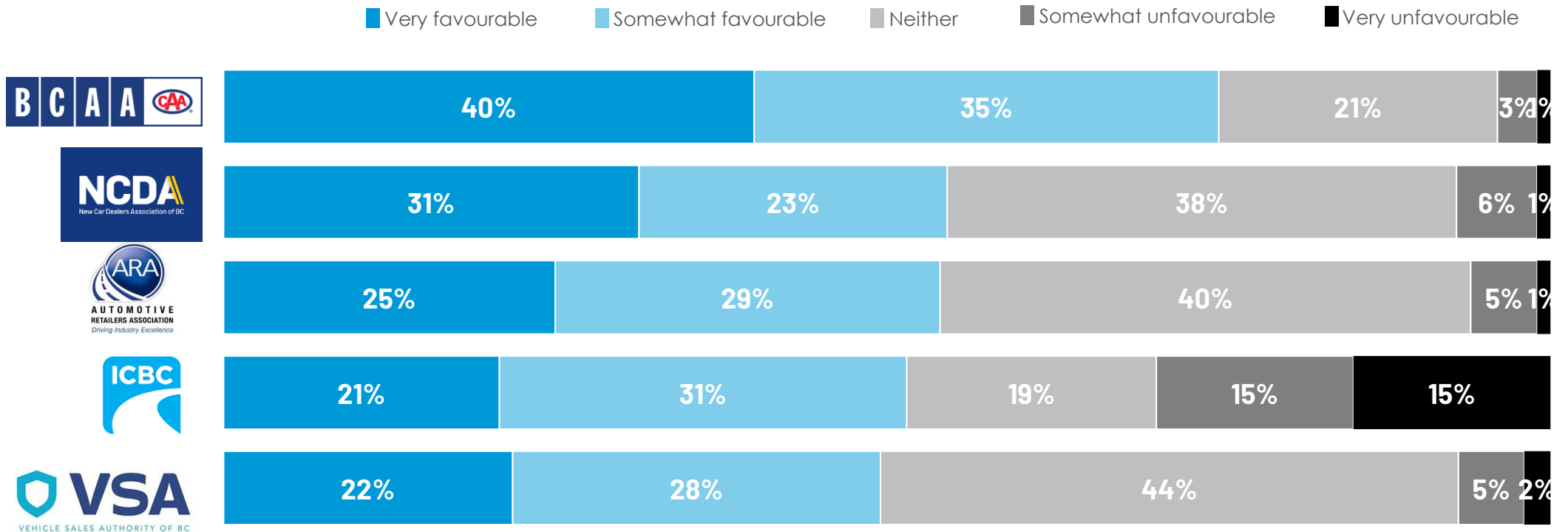


Q5. How favourable do you feel toward the following organizations?
Base: All respondents (n=varies across organizations)

Men are more likely to have favourable perceptions of the VSA (46% top2box vs 33% of women), as are those in the youngest cohort (61% of 18-34 year olds vs. 33% of 35-54 and 20% of 55+)

Among P5Y purchasers VSA ranks lower than the other organizations, this is largely due to a neutral perception; in comparison, ICBC's lower ranking is impacted by a larger portion of vehicle purchasers viewing the organization unfavourably.

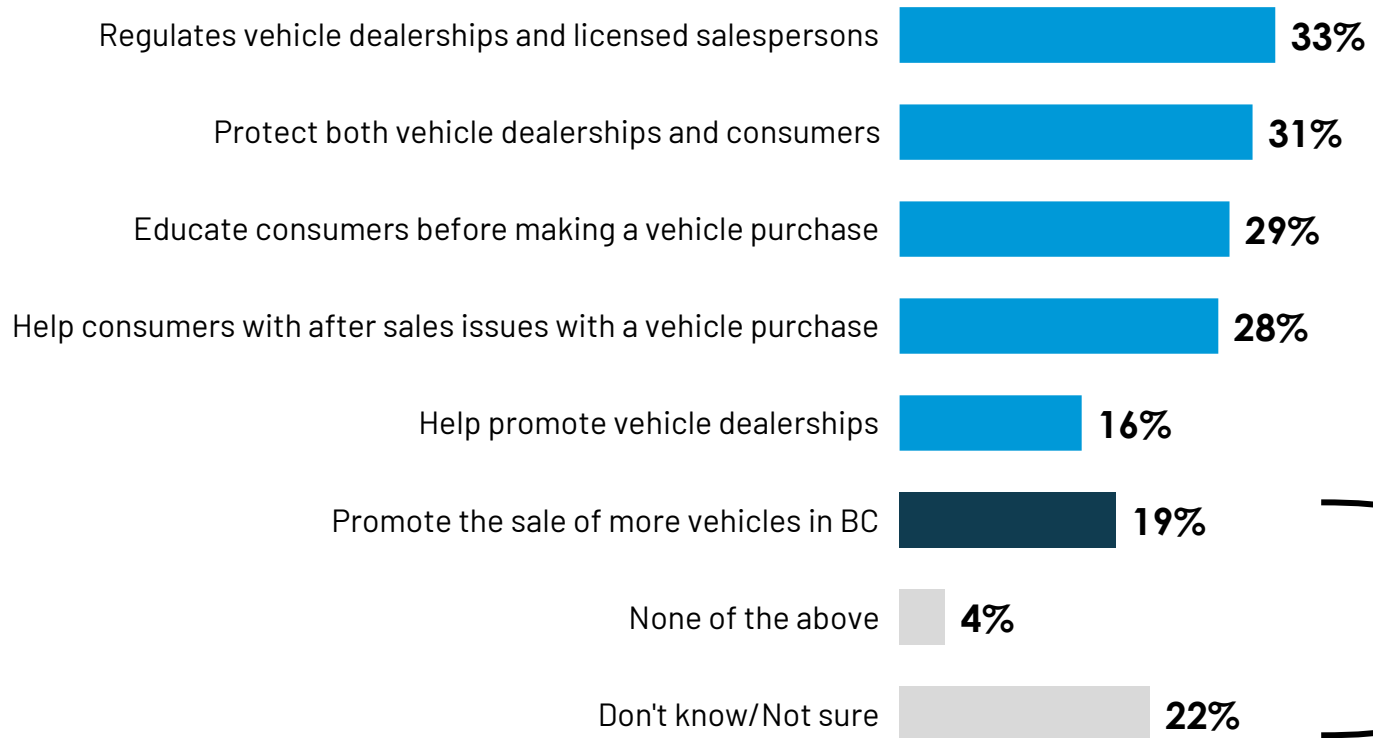
FAVOURABILITY – PAST 5 YEAR PURCHASER



Q5. How favourable do you feel toward the following organizations?
 Base: Past 5 Year Vehicle Purchasers (n=varies across organizations)

Of those who are aware of the VSA, 45% hold misconceptions or lack awareness regarding VSA's purpose, which prioritizes safeguarding consumers rather than promoting sales.

PURPOSE OF VSA – AMONG THOSE AWARE OF THE VSA

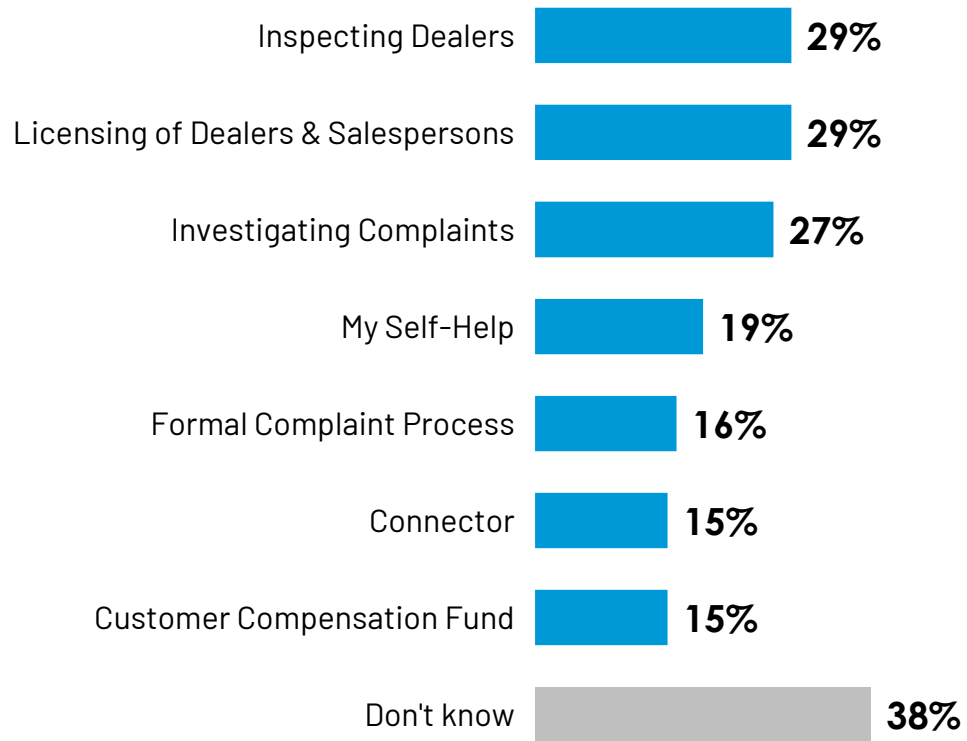


45% of respondents who are aware of VSA either have a misconception OR are unaware of VSA's purpose.

Q6. To the best of your knowledge, what is the purpose of the Vehicle Sales Authority (VSA) in BC?
Base: Aware of VSA (n=366)

The majority of the population does not recognize the services provided by VSA. Many of those who are aware of VSA are uninformed about its specific services (38%).

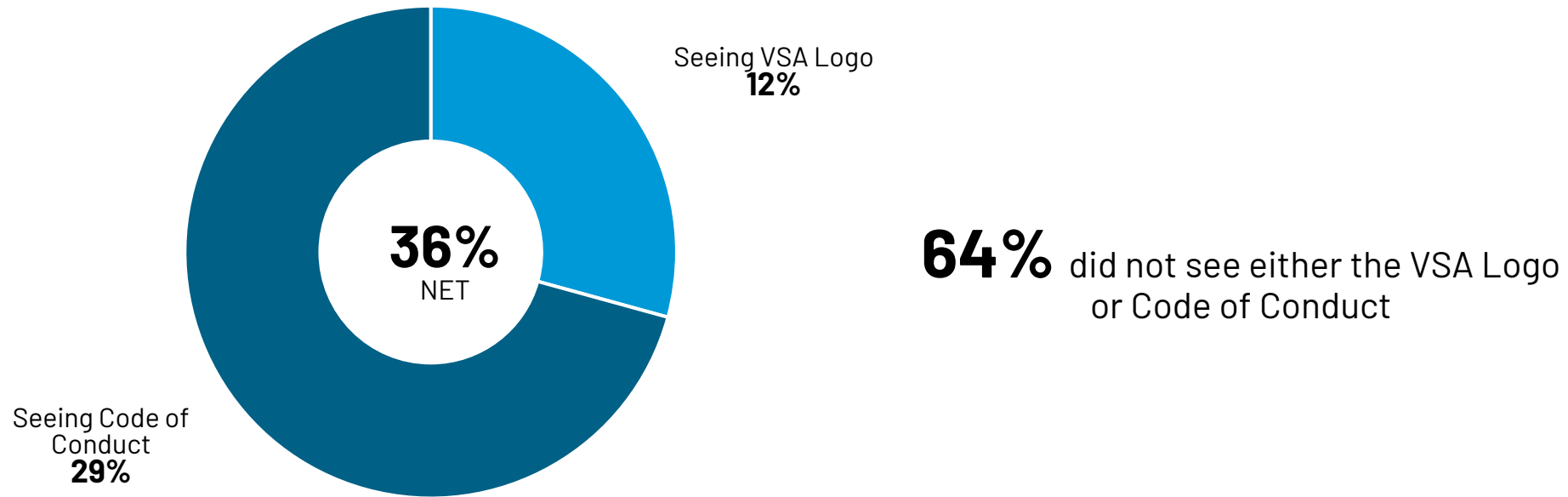
AWARENESS OF VSA SERVICES – AMONG THOSE AWARE OF THE VSA



Q7. Which of the following services are provided by the Vehicle Sales Authority (VSA) in BC?
Base: Aware of VSA (n=366)

Over one-third of British Columbians who visited a dealership within the past year recall encountering the VSA logo or Code of Conduct.

RECALL OF LOGO AND CODE OF CONDUCT – AMONG P12M DEALERSHIP VISITORS



8. Which of the following did you see when you visited a car dealership in the past 12 months
Base: Visited dealership within the past 12 months (n=379)

THANK YOU

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