

The Road Ahead: Canada's Automotive Retail Technology Study

Fall 2025

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CADA Opening Remarks

CADA is very proud to share the findings of the inaugural *Canadian Automotive Retail Technology Study (CARTS)*.

This study is the first of its kind in Canada.

What makes CARTS so valuable is that it represents the voice of the dealer—specifically the feedback of 549 dealership decision-makers and end-users from across the country regarding their experiences with various retail technologies and their plans for future technology adoption.

CARTS therefore allows you to examine your own tech stack in comparison to other Canadian dealers and to understand where and how retail tech is likely to evolve.

CARTS also includes, for the first time, analysis of what truly drives dealer satisfaction with tech solutions. These key satisfaction drivers have now been quantified in terms of their relative impact. The two most significant drivers alone account for over half of dealer satisfaction: *the solution meets dealership needs* and *ease of use*.

These findings point to how dealers should think about and evaluate various tech solutions as well as how tech providers need to promote their solutions to dealers to deliver maximum impact.

As the technology landscape continues to evolve, CARTS will be repeated on a regular cadence so we can continue to provide new insights and recommendations to Canadian dealers.

I would like to extend my sincere thanks to RBC Automotive Finance for their generous sponsorship of CARTS and to the dealerships across Canada who took the time to share your thoughtful feedback for the benefit of our industry.

Additionally, I would like to acknowledge the efforts of the CADA Industry Relations and Clarify Group Inc. teams for their diligence in preparing this timely look to the future.

Sincerely,



Tim Reuss
President & CEO
Canadian Automobile Dealers Association

RBC Opening Remarks

At RBC, we recognize that Canada's new car dealers are at the heart of an industry undergoing rapid transformation. Every day, dealers make critical decisions about the technology that supports their operations, empowers their people, and enhances the customer experience. Through RBC Automotive Finance, we're committed to helping dealers adapt and grow by offering innovative financing programs, streamlined tools, and the expertise to navigate a changing automotive landscape.

That is why we're so proud to be the exclusive sponsor of the inaugural **Canadian Automotive Retail Technology Study (CARTS)**, produced for the Canadian Automobile Dealers Association (CADA) by Clarify Group Inc.

What makes this study especially valuable is its unique approach. By capturing the perspectives of both dealer principals—the decision makers who guide technology investments—and the employees who rely on these systems every day, CARTS offers a broad view of the dealership technology environment. This dual perspective provides not only an important picture of how technology is being used today, but also a roadmap for where opportunities and challenges lie ahead.

Technology is changing every aspect of retail automotive, from digital retailing and customer engagement to service operations and the growing role of artificial intelligence. For dealers, navigating this fast-moving landscape is both a challenge and an opportunity. We believe that CARTS will help bring clarity to the choices dealers face, helping to better understand what's working, what needs attention, and how innovation can strengthen their businesses.

Because this is the first edition of an annual series, CARTS will continue to reflect the real-world experiences of Canada's dealers as technology evolves. We hope it becomes a trusted resource to support informed decisions, stronger performance, and lasting success.

As sponsor, it is our privilege to help ensure that this important research is available to dealers across the country.



Vince Eastgate

VP, Business Development and OEM Relationships
RBC Automotive Finance

Executive Summary

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Executive Summary: Preface

The Canadian Automotive Retail Technology Study (CARTS) is conducted by Clarify Group on behalf of CADA, with the generous sponsorship of RBC Automotive Finance.

CARTS is part of the ongoing CADA Road Ahead research series, designed to help understand the current and future challenges and opportunities facing Canadian auto retailers.

Two distinct groups were surveyed: **Decision-Makers**, who are retail management personnel responsible for or influential in technology investment decisions for their dealerships; and **End-Users**, who work with these technologies every day.



Decision-Makers



End-Users



Executive Summary: Decision-Makers



Dealer Receptivity to Technology

- Nearly a third of decision-makers (29.5%) consider themselves **First Movers** and **Early Adopters**
- Just over a third (37.2%) are in the middle, **Open to Change** if the business case makes sense
- A final third (33.4%) are **Cautious**, preferring to take a wait-and-see approach but, given the rapid pace of change, risk being left behind



Technology Investment Plans (Next 12 Months)

- 4 tech areas represent the investment priorities of more than half of decision-makers (50.5%):
 - Lead management and automated response (16.3%)
 - Digital advertising / SEO (15.9%)
 - Cyber-security and fraud prevention (9.8%)
 - CRM (8.5%)



Friction Points: It's Not All Smooth Sailing

- The biggest headache: making the tech work effectively within dealership operations
- A majority of decision-makers:
 - Admit they are not using tech solutions to full potential (59.0%)
 - Struggle with integration (54.8%)



Manufacturer Support: A Mixed Picture

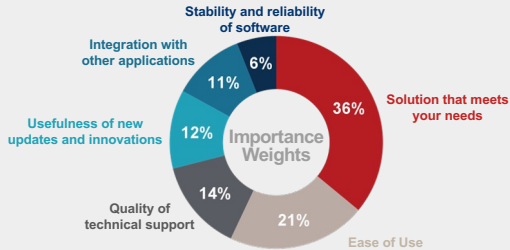
- Half of decision-makers (49.8%) rate tech support from their OEM good or excellent
- However, the other half feel OEM support is only fair (34.9%) or poor/very poor (15.3%)
- Tech coordination and support needs to improve if OEMs and Dealers are to be successful elevating customer experience in a digital world



AI Adoption: Growing but with Limited Impact

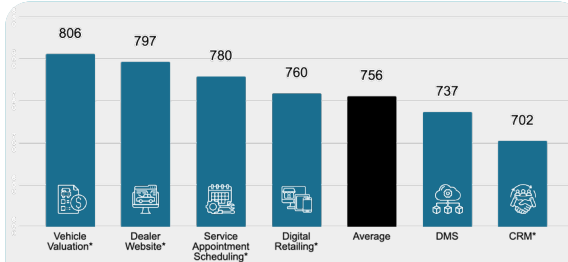
- Nearly 60% of decision-makers report some form of AI adoption, mostly in marketing and sales activities
- While some DM's report benefits, nearly 30% have yet to experience any noticeable impact, suggesting that dealers and tech providers need to spend more time better defining the AI use case ("What problem are we trying solve?")

Executive Summary: End-Users



Drivers of Satisfaction with Tech Solutions

- End-users rated their experiences with six commonly used tech solutions across six different attributes
- While all attributes are important, some have a larger impact on satisfaction than others—these are the 'key drivers'
- Two key drivers account for 57% of the overall dealer experience:
 - **Solution that meets your needs** (36% impact)
 - **Ease of use** (21% impact)



Dealer Satisfaction Varies Widely Across Solutions

- **Vehicle Valuation tools** earn the highest marks (806 on a 1,000 point scale), followed by **Dealer Websites** (797) and **Appointment Scheduling tools** (780)
- **CRM** (737) and **DMS** (702) are rated below the tech satisfaction average, highlighting opportunities for providers to make these core systems more intuitive and reliable
- To make their experience better, end-users want applications that are easier to navigate, with cleaner interfaces and smoother integration between systems



AI: Uneven Adoption

- A majority of end-users (58%) have yet to use AI, suggesting significant efficiency gains are possible going forward
- The balance (42%) use AI tools, mostly to automate customer communications
 - Nearly 93% report efficiency gains
 - Most use tools like ChatGPT and MS Copilot without management oversight or control of where and how data is used
 - Employee use of unapproved company AI tools increases the risk of data leakage, unauthorized exposure, and regulatory non-compliance

Executive Summary: Recommendations (1/2)

There are tremendous opportunities for dealers to improve their businesses through technology. At the same time, the CART Study reveals some key considerations and cautionary findings that dealers need to keep in mind:

- 1** The biggest adoption challenge is not the quality of the code or software capabilities, it's the alignment between the solution's capabilities and the needs of your business. When meeting with vendors, ensure the conversation emphasizes your business needs, not the technology's features. If the business benefit isn't clear before implementation, it will likely remain unclear afterward resulting in sub-optimal ROI.
- 2** Applications that are intuitive to use can dramatically improve adoption and reduce the need for ongoing support throughout the product's lifespan. If an application is difficult for your staff to use, it might not be the right fit for your business.
- 3** Make sure you fully understand how a new technology or tool (including AI) will integrate into your current systems and workflows. A vendor should contractually commit to any required integration. Remember that integration with physical workflows matters too—it's not just about how technologies work together.
- 4** Consider the needs of your entire business. For example, the technologies available for your service department can dramatically impact your customers' ongoing experience with your dealership, helping to drive retention and word-of-mouth referrals.



Executive Summary: Recommendations (2/2)

5 Be careful not to move too slowly in a fast-moving tech landscape. Balancing the need to learn with the need to act is challenging. **The more you focus your conversations on the business needs and impacts of technology, the more confidently you'll be able to move forward.** Use dealer peers and your OEMs as resources to accelerate learning.

6 While Artificial Intelligence (AI) is widely regarded as the “next wave” in technology, there is considerable room to improve AI adoption effectiveness.

- **For dealers:**

- Clearly define the problem to be solved
- Challenge vendors to demonstrate how their solution will address your specific business needs, without getting caught up in a long list of features
- Prioritize governance, approved tools, and consistent policies to ensure responsible, effective adoption

- **For Tech Providers:**

- Promote your services to dealers by asking, not by telling
- The key driver of dealer satisfaction is not the length of the feature set, it is the fit between the tech and the dealer's business need



Key Insights

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Key Insights: Decision-Makers (1/5)

Dealer Receptivity

When it comes to embracing new technology, Canadian dealers are split into three broad groups:

- At one end, nearly 3 in 10 dealers (29.5%) consider themselves **First Movers** and **Early Adopters** who jump on the latest innovations
- At the other end, 1 in 3 dealers (33.4%) are **Cautious**, preferring to take a wait-and-see approach before committing to any tech adoption
- The bulk of dealers (37.2%) are in the middle, **Open to Change** if the business case makes sense

Given the rapid pace of technological change, **Cautious** dealers risk being left behind.



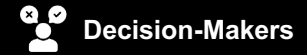
Key Insights: Decision-Makers (2/5)

Technology Investment Plans

What are dealers actually investing in these days?

We're finding a lot of activity around AI tools for automated responses, marketing, and customer targeting. DMS systems are popular choices, along with appraisal tools. Communication and CRM platforms are also significant investment opportunities for respondents.

Looking ahead, sales lead generation, digital advertising, and SEO are where dealers plan to invest next—nearly one-third (32.2%) are prioritizing these areas. Of note, DMS systems seem to be lower on the investment priority list (4.5%), likely because many dealers have already made significant investments here.



Key Insights: Decision-Makers (3/5)

Friction Points

It's not all smooth sailing.

The biggest headache isn't buying the technology—it's making it work properly within dealership operations.

A majority of dealers (59.0%) admit they're not using tech solutions to their full potential, and 54.8% struggle with integration challenges.

Training and ongoing support remain pain points for 41.0% of respondents.

A glowing blue target graphic with several arrows hitting the bullseye, set against a dark teal background with a grid pattern.

59%

of dealers admit they're not using tech solutions to their full potential.

Key Insights: Decision-Makers (4/5)

Manufacturer Support

When it comes to manufacturer support, the picture is mixed.

Nearly half of retailers give their OEMs good or excellent marks for technology support, but 15.3% say it's poor—and that number jumps to 19.7% for Detroit-3 brand dealerships.

This needs to be an area of focus for the industry. OEMs and Dealers both want to elevate the customer experience. With so much of that happening in the digital space, the level of technology coordination and support between OEM and Dealers needs to improve.

A background image showing a close-up of two hands shaking in a firm grip, symbolizing agreement or partnership. The hands are wearing blue sleeves.

Nearly 50%
of decision-makers feel their
OEM is supportive when it comes
to technology

Key Insights: Decision-Makers (5/5)

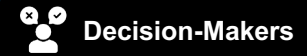
AI Adoption

AI adoption is growing, with 59.8% of decision-makers already using it in some form, primarily for marketing and sales activities. The early results are encouraging: 30.9% report improved customer experiences, though 29.6% haven't noticed much impact yet, suggesting there's still room to find the right AI solutions.

Clearly defining the specific business benefit of AI solutions will be the catalyst to further adoption. Dealers are eager to move forward with AI. They feel the urgency, but need clarity on how their businesses will benefit and what the ROI looks like. In fact, clearly matching a technology to a specific business process or challenge is foundational to all successful technology investment, not just AI.

Dealers will need to challenge vendors to address specific business needs and challenges in their sales presentations, and not get caught up in feature sets.

For Vendors, this means selling by asking, not telling.

A graphic of a blue circuit board with a central square chip labeled "AI" in white. The background is a dark blue with glowing circuit lines.

59.8%

of decision-makers already using AI in some form, **primarily for marketing and sales activities.**

Key Insights: End-Users (1/3)

Drivers of Satisfaction

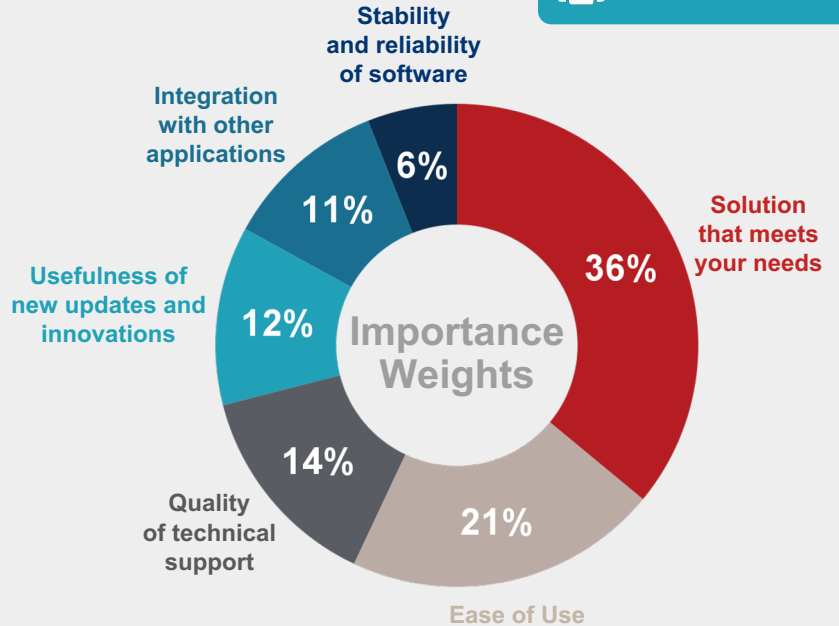
For the first time, the CART Study has determined the key drivers of tech satisfaction for Canadian dealerships by asking end-users to rate each application (six were measured this year) across six different attributes.

The importance weights for each attribute were then calculated using regression analysis.

While all six attributes are important to overall satisfaction, some clearly have a larger impact on satisfaction than others—these are the **'key drivers'**.

Tech providers can now assess their product and service offerings knowing which attributes matter most to their Canadian dealer customers.

 End-Users



Key Insights: End-Users (2/3)

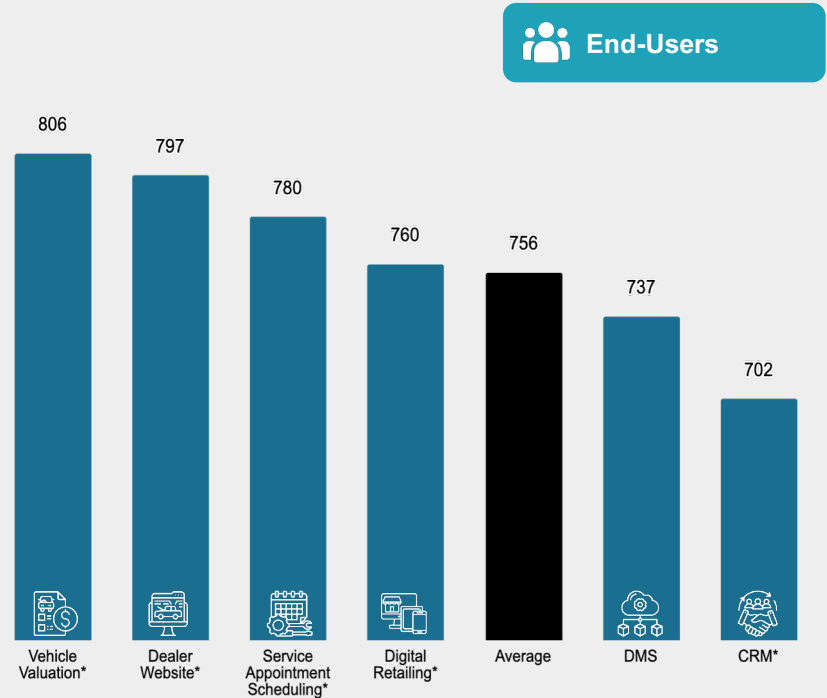
Dealer Satisfaction

Satisfaction varies widely across each tech application.

Vehicle Valuation tools earned the highest marks, with users praising their performance across all six satisfaction attributes measured.

CRM and DMS solutions, on the other hand, landed below average on the satisfaction scale, highlighting opportunities for providers to make these core systems more intuitive and reliable.

When asked what would make their tech experience better, end-users were clear: they want applications that are easier to navigate, with cleaner interfaces and smoother integration between systems.



Key Insights: End-Users (3/3)

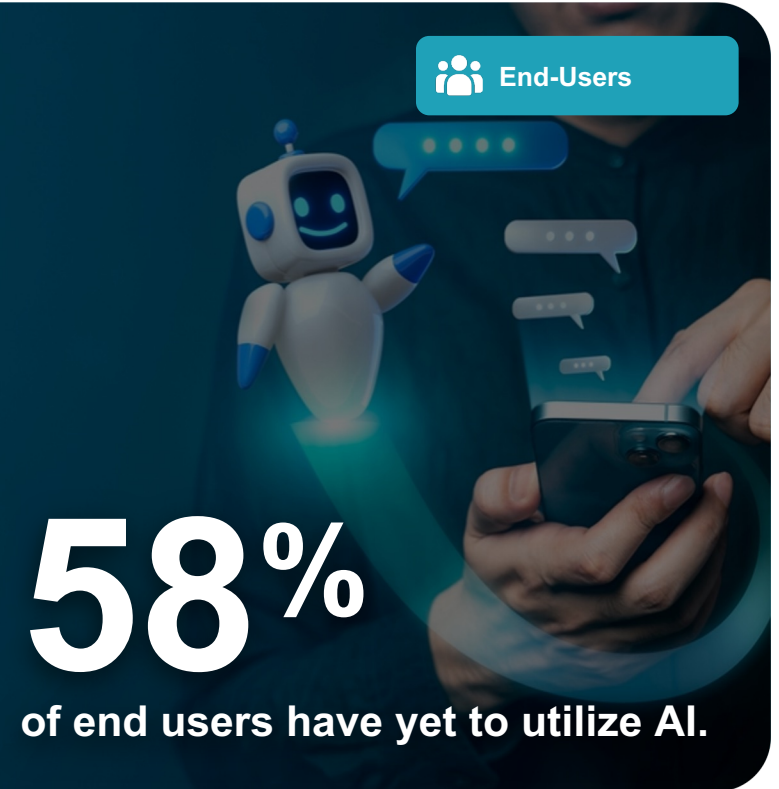
AI Adoption and Impact

Artificial intelligence is also starting to play a role in end-user workflows.

Of those who've tried AI, an impressive 92.6% say it's boosted their efficiency. **The challenge is that nearly 3 in 5 dealership end-users (58.0%) have not used any form of AI.** For the 42% who have, the most common uses are in customer communication (27.4%), followed by writing vehicle descriptions and conducting general research.

For many, AI is already proving to be a valuable helper behind the scenes. The study reveals a gap between Decision-Makers (59.8%) and End-Users (42.0%) reporting AI use, suggesting uneven adoption in dealerships. This may stem from dealership staff using personal AI tools rather than approved systems, increasing data and compliance risks.

To address this, dealers need stronger governance, standardized tools, and clear policies for responsible AI use.

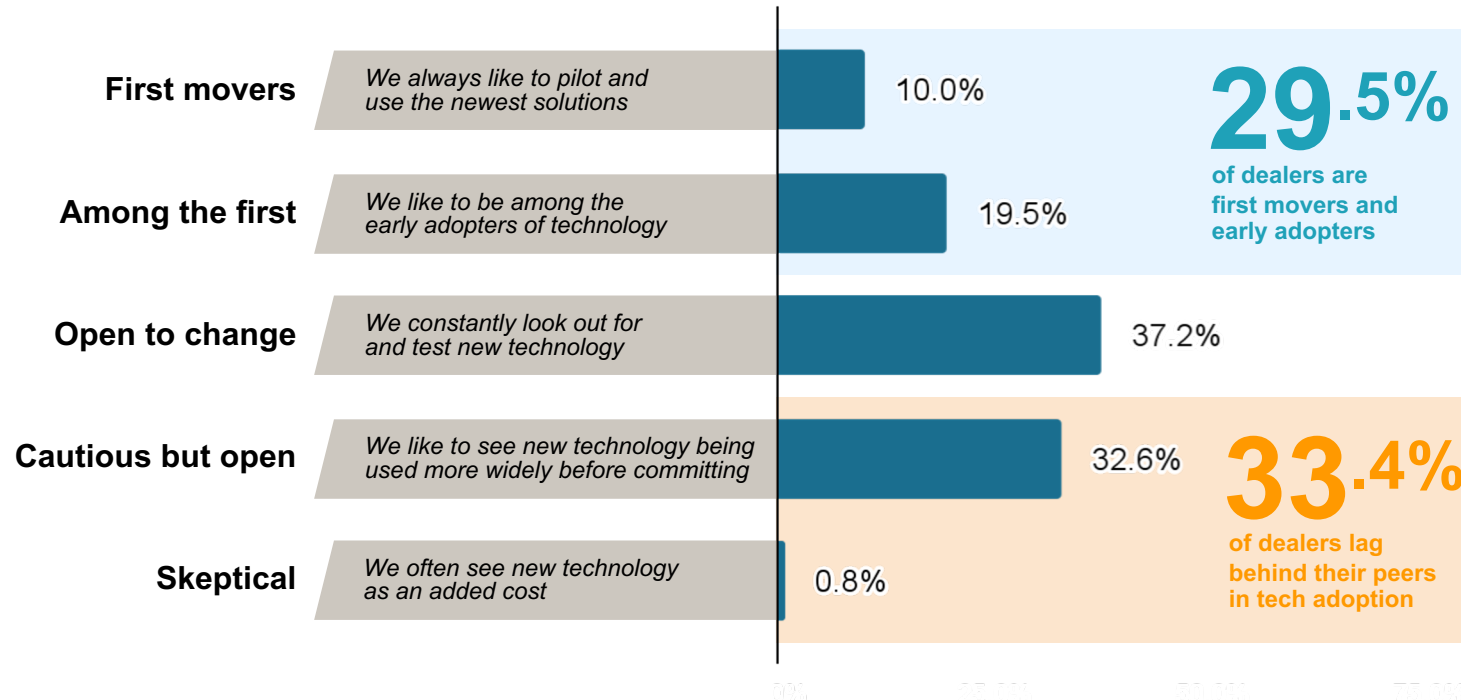


STUDY FINDINGS

Decision-Makers



Approach to New Technologies



Decision-Makers

- The vast majority of Canadian dealer decision-makers are **“technology positive”** expressing openness to adopting digital solutions across their business
- Decision-makers are almost evenly divided between those **quick to adopt new solutions** (29.5%), those **open to new technology** (37.2%) and those open but who prefer to **“wait and see”** first (32.6%)
- There is concern that 33.4% of respondents are **slower movers** on technology. This leaves those retailers open to be passed by competitors who choose to move more quickly.

D1. Typically, how open would you say your store is to new retail automotive technologies?

n = 261

Decision-Makers: New Tech Adoption (1/2)



We recently added [AI service booking tool] to handle our service calls to book appointments.

– #51, Single Rooftop, Single Brand, Ontario

Video MPI, texting from DMS, full CRM integrations with our DMS as well as phone system... Online payment systems fully integrated with accounting, as well as wholesale customer dashboards for invoice tracking and statement payments.

– #192, Multi-Rooftops, Multiple-Brands, Québec

New delivery tracking system, chat systems, video platforms, mobile payment.

– #280, Multi-Rooftops, Multiple-Brands, Ontario

D2. Can you provide an example of the type(s) of new retail technology you personally use in-store?

n = 261

Decision-Makers: New Tech Adoption (2/2)



Desking software, appraisal tools, marketing and website tools, [and] auction tools.

– #458, Multi-Rooftops, Multiple-Brands, Québec

AI auto response, Live AI conversations with guests, AI marketing and targeting future potential buyers based on online activity and/or purchasing activity and/or service and parts activity.

– #158, Single Rooftop, Single Brand, Atlantic

We've adopted a CDP (Customer Data Platform) that proactively reaches out to our clients based on data as well as behaviour (clicking on email links, browsing websites, clicking on ads). We also employ AI chat/texting.

– #235, Multi-Rooftops, Single Brand, Ontario

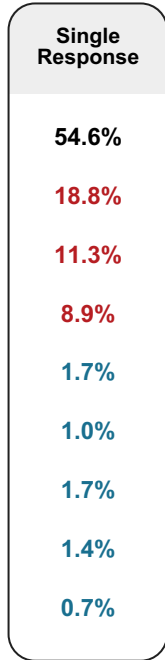
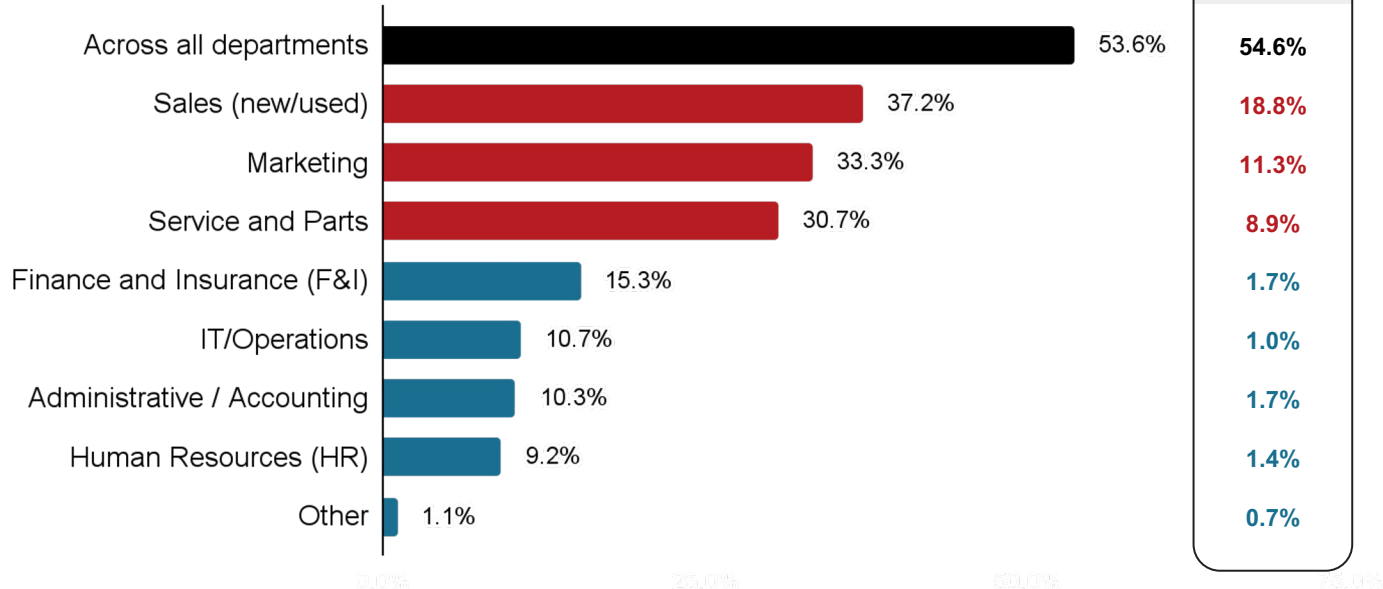
D2. Can you provide an example of the type(s) of new retail technology you personally use in-store?

n = 261

Tech Impact Potential

Share of Responses (%)

(Multiple response options)



D3. Where do you see new automotive retail technologies having a positive impact on your dealership?
 D4. Which single area do you see new technologies having the greatest positive impact?

n = 261

Decision-Makers

- The majority of decision-makers see the potential for technology to drive positive outcomes across the entire business
- When asked to prioritize, **dealer tech focus is on the customer-facing departments: Marketing, Sales and Service & Parts**
- Over time dealers will also want to explore how tech can enhance back-office functions including Accounting and HR (including talent acquisition)

Decision-Makers: Positive Impact (1/3)



We started using AI to respond to (and follow up) leads. This has proven to be the most efficient use of technology by handling 'fake leads' and preventing them from tying up (and demotivating) sales staff. It also continues to follow up leads until there is a commitment to visit the store.

— #89, Single Rooftop, Single Brand, Atlantic

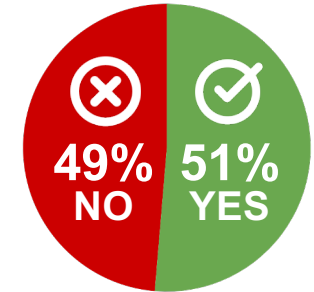
[Digital CX management] reducing the number of calls and increasing employees' available time, also allows for mass mailings. The next step to reduce time is the implementation of AI.

— #129, Single Rooftop, Multi-Brands, Québec

By using [our DMS provider] in multiple stores, it provides better enterprise reporting than we have been able to obtain through previous solutions. This has allowed us to identify new ways to look at old KPI's, and better action them as a group.

— #472, Multi-Rooftops, Multiple-Brands, BC and NT/Ontario

D5. Is there a software solution or application you have added to your operation in the last year that has made a significant impact?



D7. Is there a technology provider in any part of your business that you feel has been particularly supportive? And briefly why?

n = 261

Decision-Makers: Positive Impact (2/3)

Decision-Makers

[Our] DMS has many great features, the main one being that it is fully integrated across all departments. Service Advisors say its the easiest system they've ever had to learn, most intuitive [and] easy to find lost business opportunities and act on them, all inside of the system. That said, there are Canadian specific issues that have not been addressed to our satisfaction... early adoption means a lot of playing guinea pig.

– #154, Single Rooftop, Single Brand, Ontario

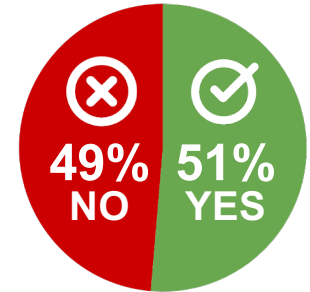
A software and marketing tool which assists us in reaching out to customers who have been in for service for potential sales opportunities, equity situations on their current vehicle, warranty expiration dates and for sending upgrade offers.

– #781, Multi-Rooftops, Multiple-Brands, Ontario

[Using an HR platform solution] has streamlined our hiring and onboarding process. We were able to standardize compliant hiring paperwork across all locations easily.

– #116, Multi-Rooftops, Multiple-Brands, Prairies

D5. Is there a software solution or application you have added to your operation in the last year that has made a significant impact?



D7. Is there a technology provider in any part of your business that you feel has been particularly supportive? And briefly why?

n = 261

Decision-Makers: Positive Impact (3/3)

Decision-Makers

[Our DMS provider] has been a great partner for us. They consistently evolve their software through feedback from their dealer clients to ultimately meet our needs.

– #282, Multi-Rooftops, Single Brand, Prairies

Our DMS [provider] is highly supportive, consistently releasing new versions to accommodate changes and ensuring advisor availability when issues arise.

– #81, Single Rooftop, Single Brand, Ontario

[Digital CX management]: Reduced BDC headcount and increased consistent contact.

– #552, Single Rooftop, Single Brand, Ontario

AI agent service for aftersales. No call goes unanswered. Every guest is taken care of.

– #656, Single Rooftop, Single Brand, Ontario

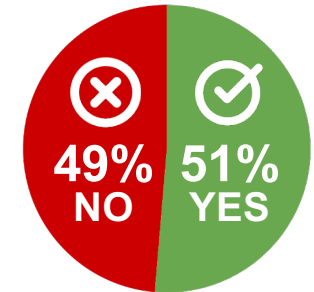
An AI based calling system as well as 3rd party appraisals.

– #462, Single Rooftop, Single Brand, BC and NT

Just got CRM installed at our store last year. It is more customizable and displays more info.

– #459, Single Rooftop, Single Brand, BC and NT

D5. Is there a software solution or application you have added to your operation in the last year that has made a significant impact?



D7. Is there a technology provider in any part of your business that you feel has been particularly supportive? And briefly why?

n = 261

Investment Plans: Next 12 Months

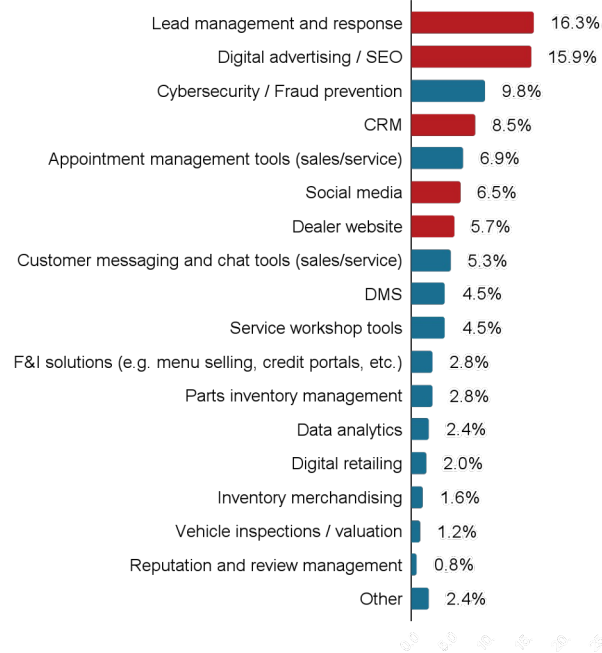
Share of Responses (%)

(Multiple response options)



Share of Responses (%)

(Single response option)



Decision-Makers

- Over half of all investment in retail tech (53.3%) in the next year will most likely be **marketing** related (see red highlighted rows)
- While **DMS** appears to be a **lower priority area for dealers** with only 11.9% planning increased investment in this area, this may reflect past levels of large DMS investment and growing interest in new technology opportunities
- **Cybersecurity and fraud prevention** tech has caught the attention of 1 in 10 dealers as a priority investment

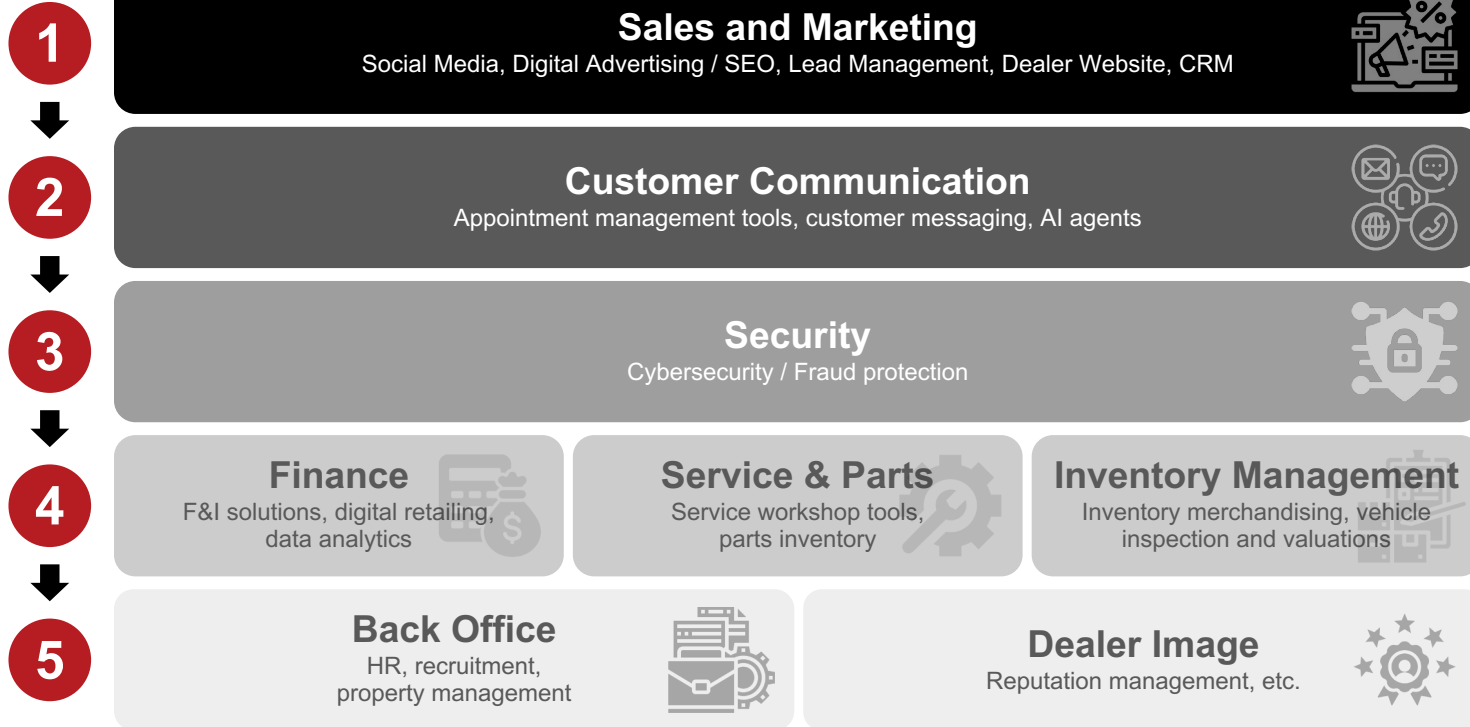
D8. Which areas of retail technology do you plan to invest more in the next 12 months?

D9. Which of these technology investment areas is your priority?

n = 261

Tech Investment Priorities

Dealer Focus Areas Next 12 Months



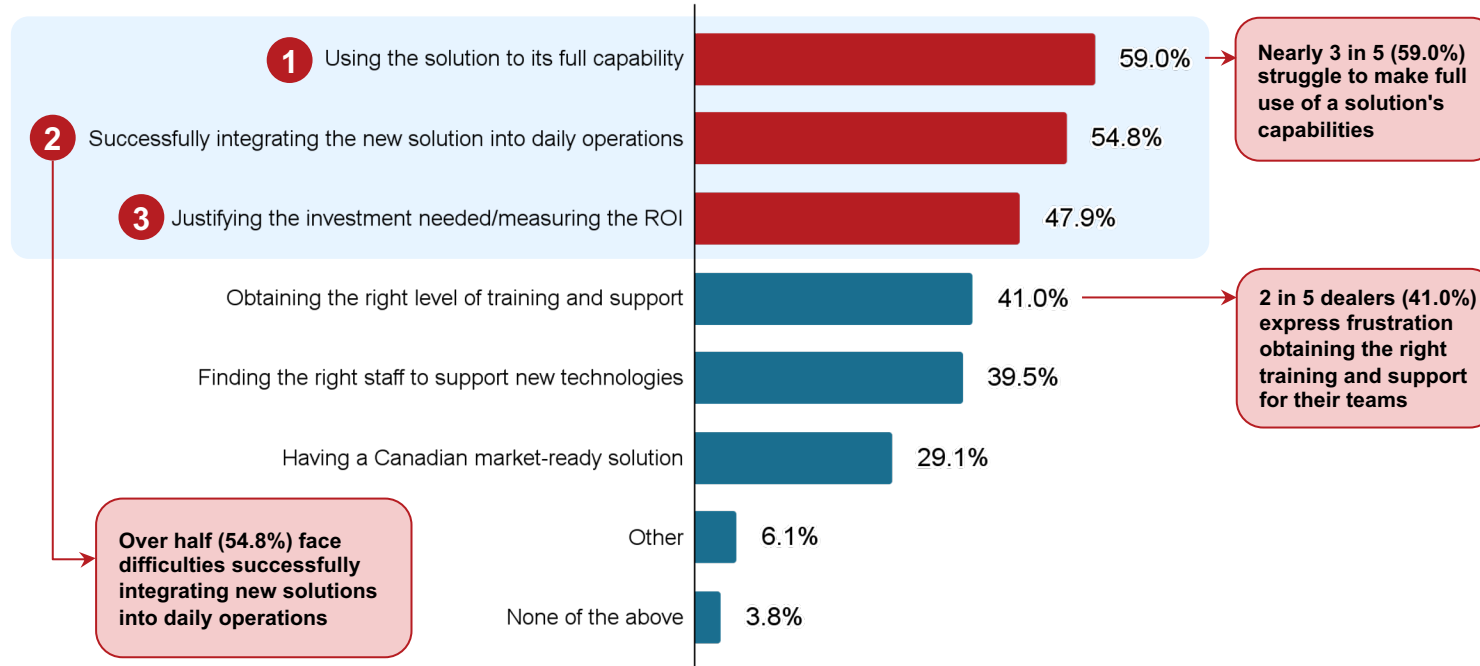
Decision-Makers

- Although there is no established tech adoption pattern among dealers, their primary focus is on **Sales and Marketing** applications, followed by **Communication** tools with customers
- **Security** is the third investment priority area, highlighting dealer concerns with data breaches
- Beyond the Top 3 priority areas, dealers have opportunities to automate and enhance the effectiveness of **F&I**, **Service & Parts** and **Inventory Management**

Challenges in Adopting New Technologies

Share of Responses (%)

(Multiple response options)



- The most significant tech adoption challenge for dealers is not the quality of the code or software capabilities, it is the **effectiveness of implementation within the dealership**
- It is clear **more time and attention must be devoted by tech providers to supporting dealerships with the successful implementation** of their solutions

Over half (54.8%) face difficulties successfully integrating new solutions into daily operations

Nearly 3 in 5 (59.0%) struggle to make full use of a solution's capabilities

2 in 5 dealers (41.0%) express frustration obtaining the right training and support for their teams

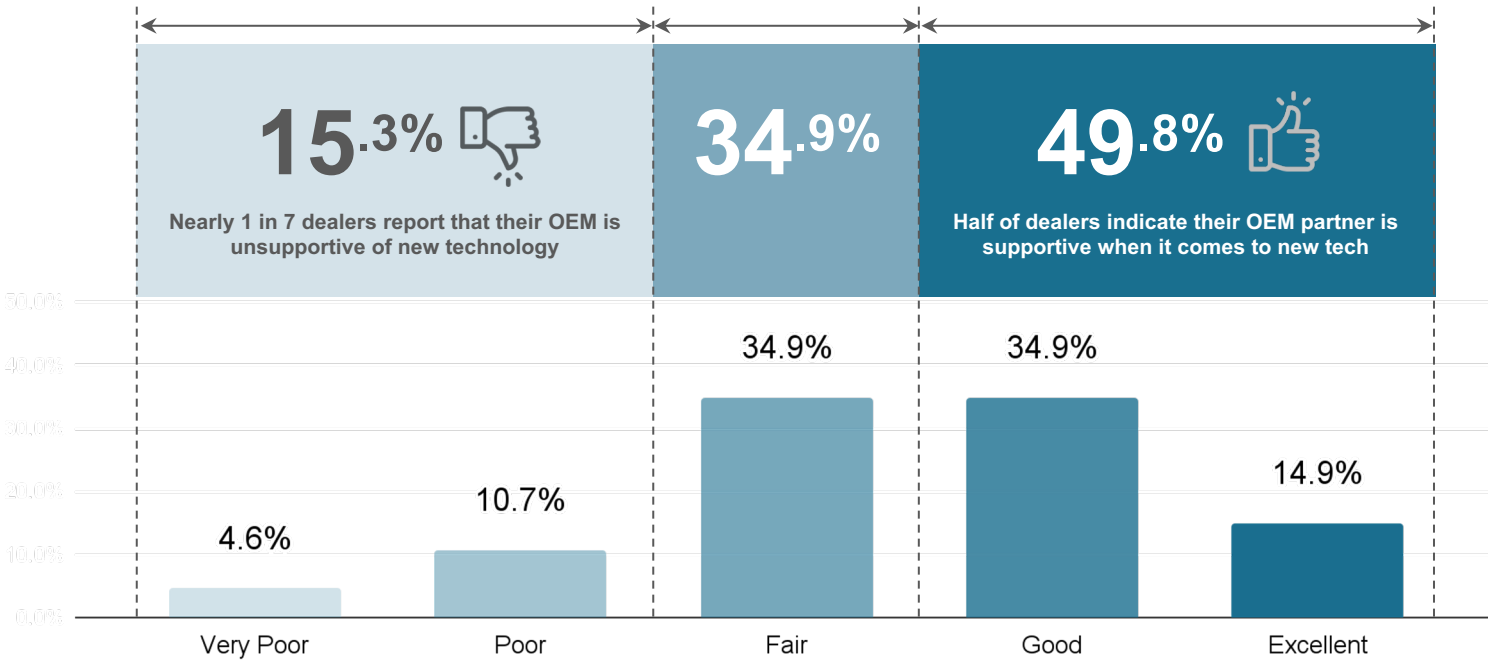
D10. Do you face any of the following challenges when selecting or adopting new technologies into your store(s)?

n = 261



OEM Support

Decision-Makers



- Only half (49.8%) of OEMs are providing support that dealers consider to be “Good” or “Excellent”
- Detroit-3 brands are most frequently cited in the unsupportive category whereas Asian brands are recognized as the most supportive
- “Excellent” Responses:
 - Asian: 57.9%
 - European: 45.8%
 - Detroit-3: 42.5%
- “Very Poor” Responses:
 - Detroit-3: 19.7%
 - Asian: 11.4%
 - European: 6.8%

D11. How supportive is your OEM franchise partner(s) in supporting new technology?
 If you have more than one manufacturer, please consider the performance of the OEM most important to your business.

n = 261

*Small sample size, n=30-99

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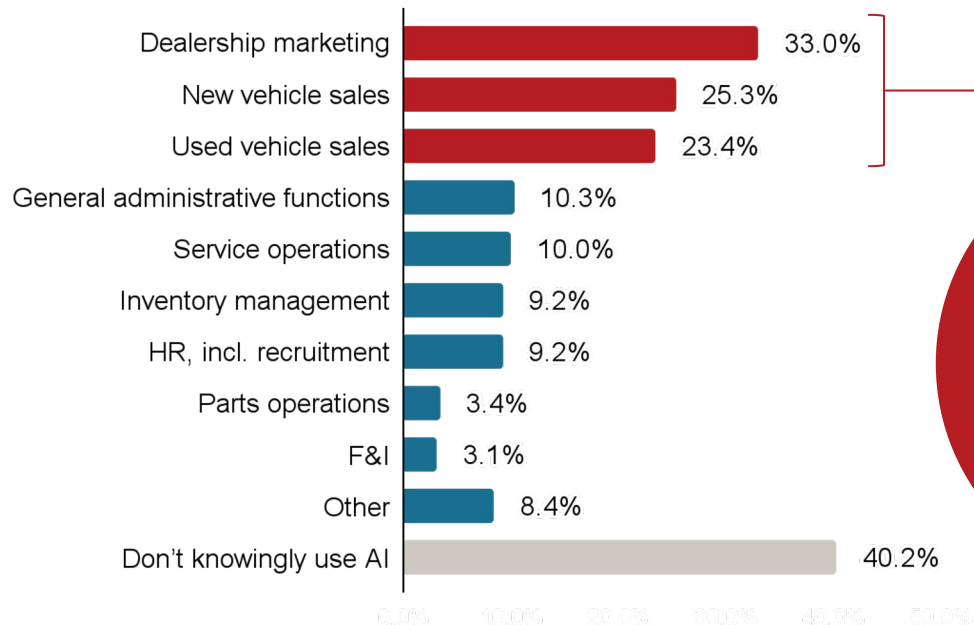
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Artificial Intelligence Usage

Share of Responses (%)

(Multiple response options)



Decision-Makers

- It is still early days for AI in auto retail
- The good news: **between a quarter and a third of dealers are already using AI to support marketing and sales efforts**
- However, **40.2% of decision-makers report no AI deployment** in their stores so far
 - For this group, AI is an opportunity to be explored with some alacrity so as not to fall too far behind local competitors who are figuring out how to create advantage

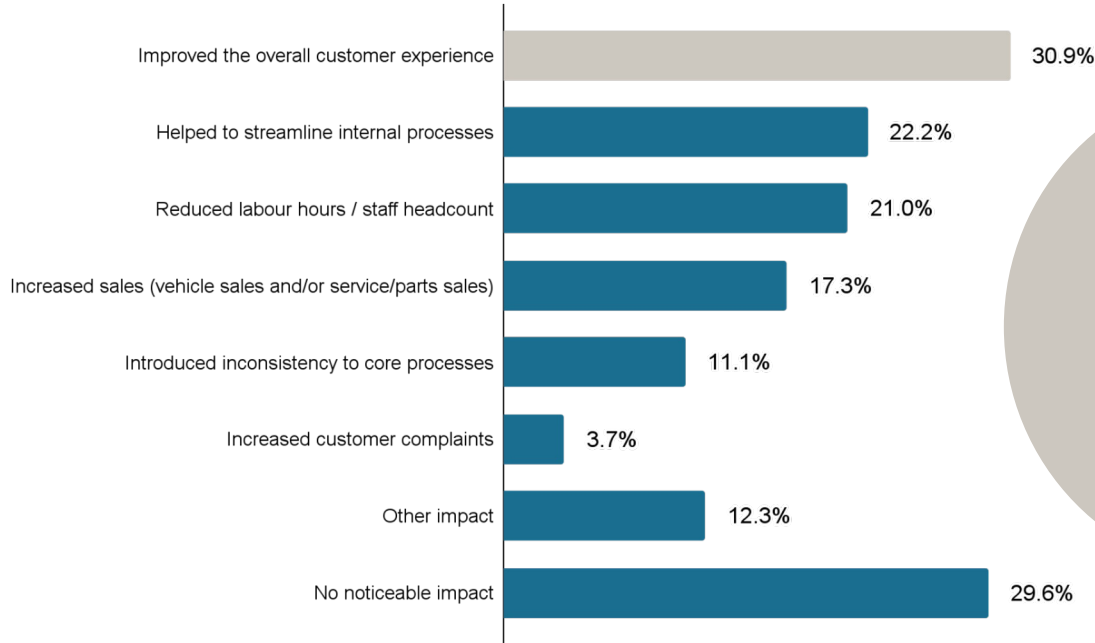
D12. Where are you using Artificial Intelligence (AI) in your business today?

n = 261

Impact of Artificial Intelligence

Share of Responses (%)

(Multiple response options)



Decision-Makers

- Nearly 1 in 3 decision-makers (30.9%) report **AI enhances the customer experience**
- Not all AI implementations are flawless: some dealers report increases in process inconsistency (11.1%) and customer complaints (3.7%)
- The sizable group of respondents who report no impact suggest that **dealers and their tech partners need to spend more time together better defining the AI use case** (“what problem are we trying to solve?”) with a proof-of-concept phase before proceeding to full implementation

D13. What impact has AI had on your operations?

n = 81

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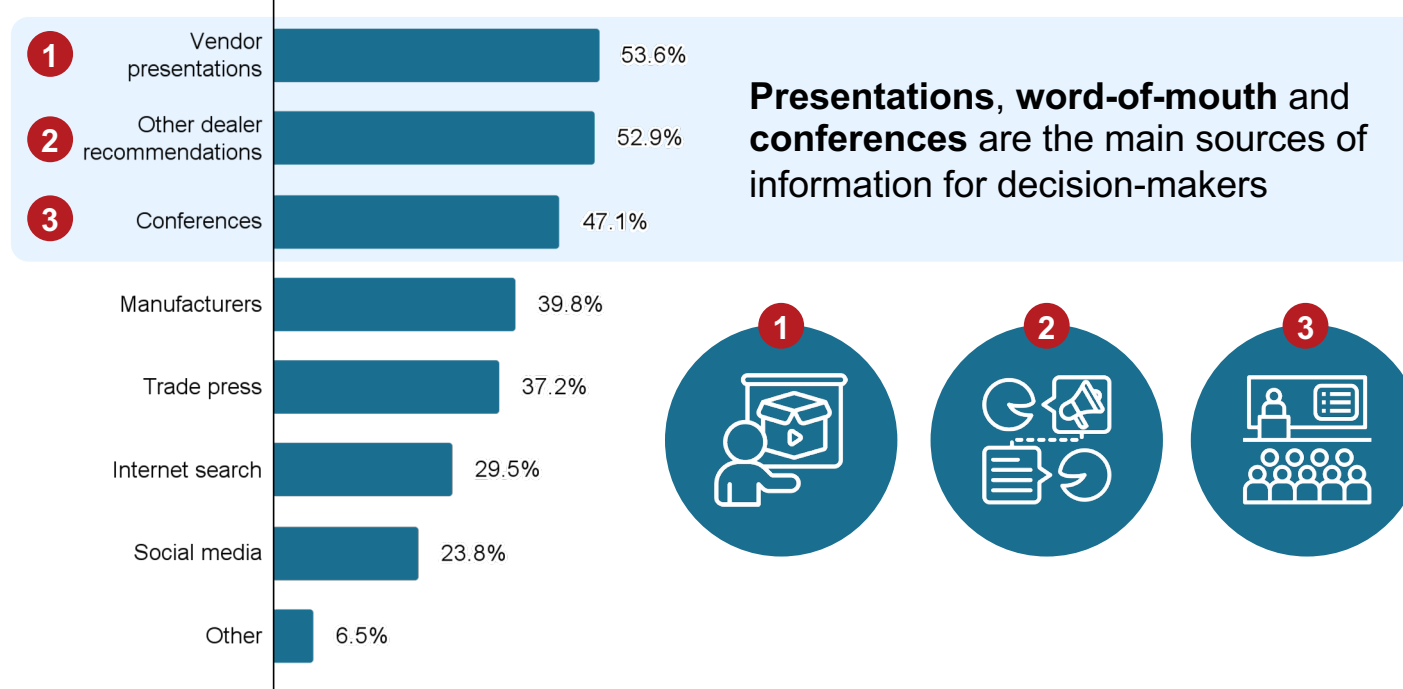
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Sources of Tech Information

Share of Responses (%)

(Multiple response options)



Decision-Makers

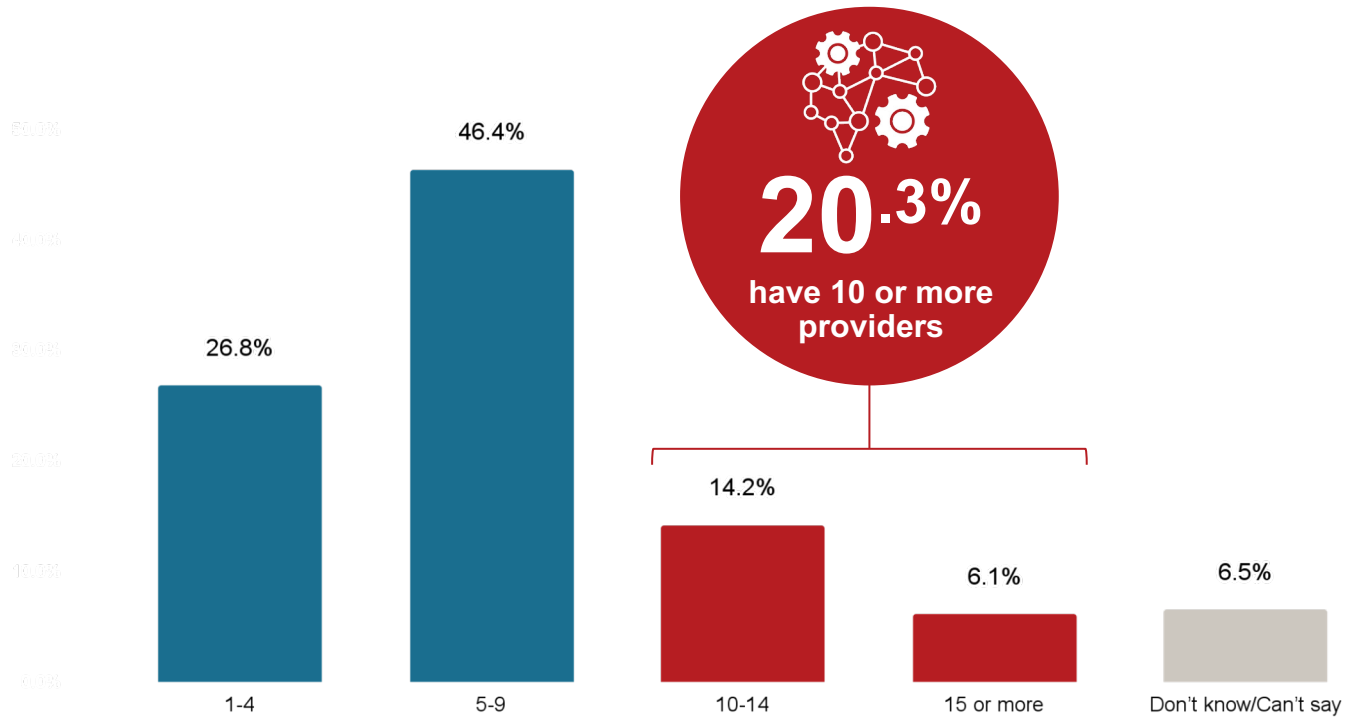
- While tech vendors can use trade press and social media to raise awareness of their company and products, **dealers have a clear preference for personal engagement when it comes to considering new tech:**
 - Speaking directly to a vendor rep
 - Hearing about the positive experiences of dealers they respect
 - Attending conferences where new retail tech is featured
- The **importance of recommendations** from existing to prospective dealers underscores the **value of successful implementation for all tech providers**

D14. How do you like to learn about new technology innovations in automotive retail?

n = 261

Dealer Tech Stack Provider Profile

Decision-Makers



- Nearly half of all respondents (46.4%) indicate **their tech stack has between 5 and 9 different tech providers**
- For 20.3% of decision-makers, **the tech stack is even more complicated** with 10 or more different solutions and/or providers to manage and integrate
- To what degree are there **opportunities for these dealers to find efficiencies to reduce the time, cost and complication of managing such a large number of tech solutions?**

D15. In total, how many applications and technology providers do you use or subscribe to?

n = 261

STUDY FINDINGS

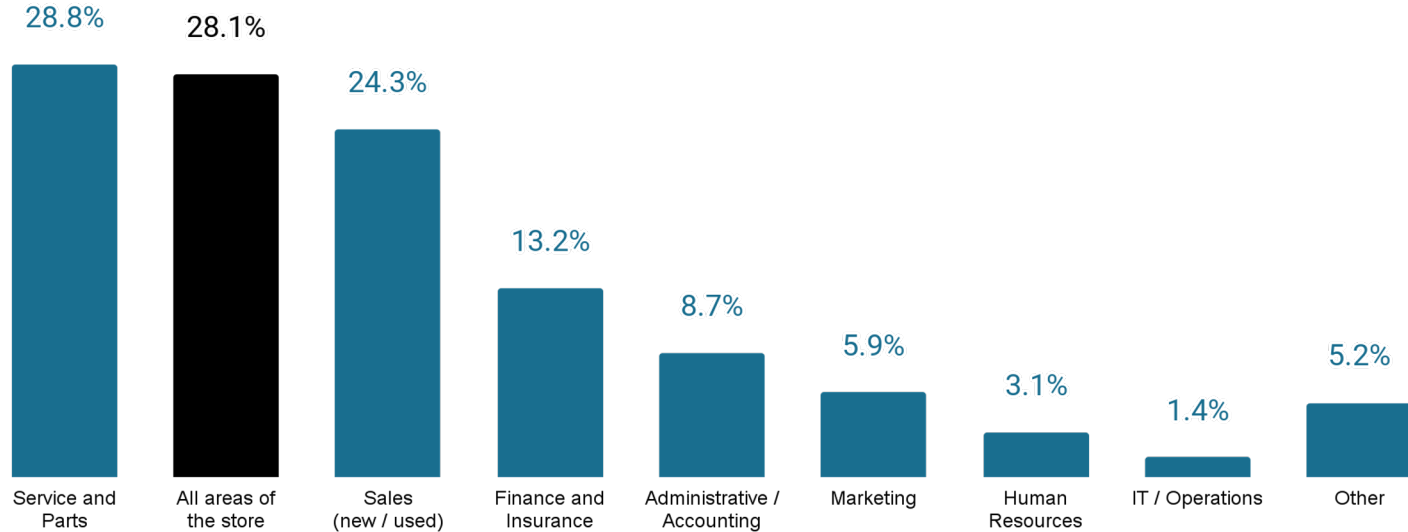
End-Users



Functional Role

Share of Responses (%)

(Multiple response options)



End-Users

- The survey represents end-users from across all departments
- Customer-facing users in Service & Parts and Sales roles represent the largest group of respondents
- The 28.1% of respondents who report working across the dealership are typically in senior roles such as Dealer Principal, General Manager and Controller
- Over 1 in 8 respondents (13.2%) support back-office functions in Accounting, HR and IT

U1. In which part of the business do you work in?

n = 288

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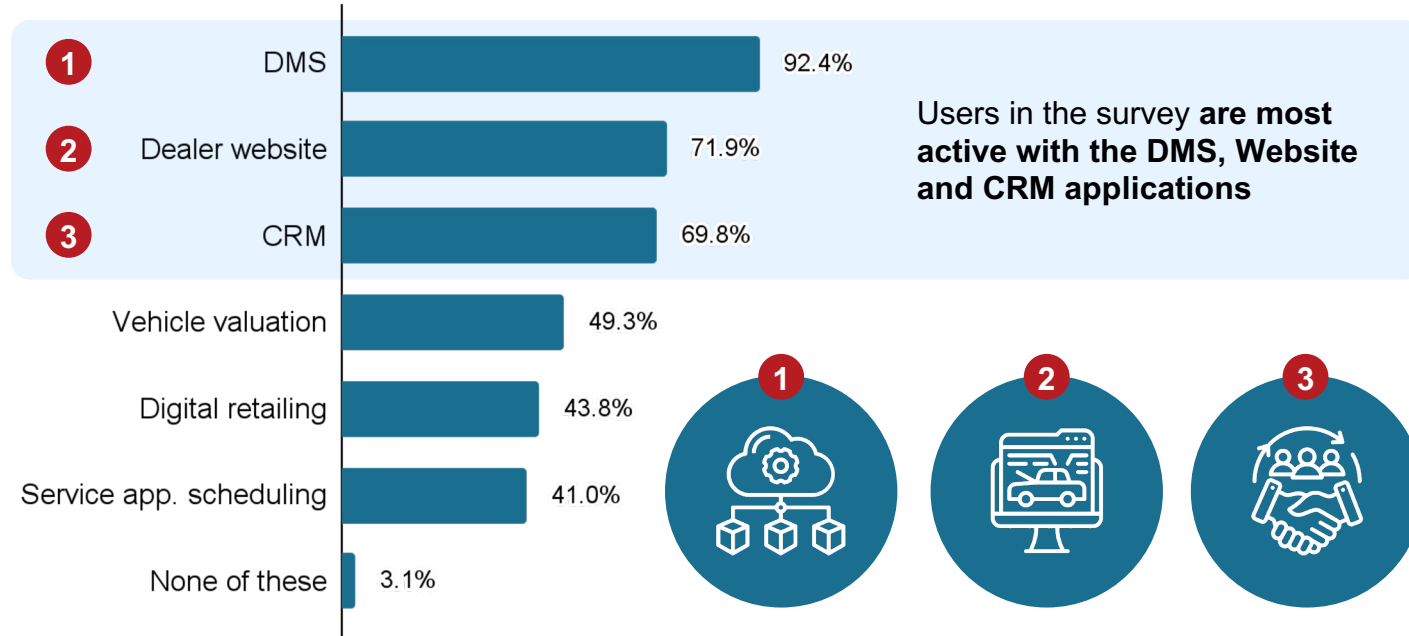
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Application Usage

Share of Responses (%)

(Multiple response options)



End-Users

- Given that **DMS** is the backbone of dealership operations, it is not surprising to find end-users interact with this solution most frequently (over 9 in 10 respondents)
- While Vehicle Valuation and Digital Retailing tools are used primarily by Sales department staff, **CRM** has application across departments
- Given the growing importance of **CRM** as a key tool for dealers to personalize sales and aftersales experiences for their customers, we should expect to see CRM usage increase over time

U2. Do you use any of the following technology applications regularly?

n = 288

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Technology Solution Ratings (1/2)

 End-Users

STEP 1

Six technology applications were rated by users

STEP 2

Each application is rated across six different satisfaction attributes (0 to 10 point scale)

STEP 3

Determine satisfaction levels for each application and the impact of each attribute on overall user satisfaction

1. DMS
2. CRM
3. Dealer Website
4. Digital Retailing
5. Vehicle Valuation
6. Service Appointment Scheduling

On average, each respondent provided feedback on 2 different applications, resulting in 518 individual respondent ratings across all six applications

Attribute	Weight	Rating	Weighted Score
Solution that meets your needs	36.38%	7.59	2.76
Ease of use	20.64%	7.64	1.58
Quality of technical support	13.84%	7.75	1.07
Usefulness of new updates and innovations	11.79%	7.14	0.84
Integration with other applications	11.25%	7.33	0.82
Stability and reliability of software	6.10%	7.92	0.48
Index Score (Sum Weighted Score x 100)			756

U3. Using a 0-to-10-point scale, where '0' is Completely Dissatisfied and '10' is Completely Satisfied, how would you rate your main [Application] provider on the following...?

n = 288 (Total Ratings n = 518)

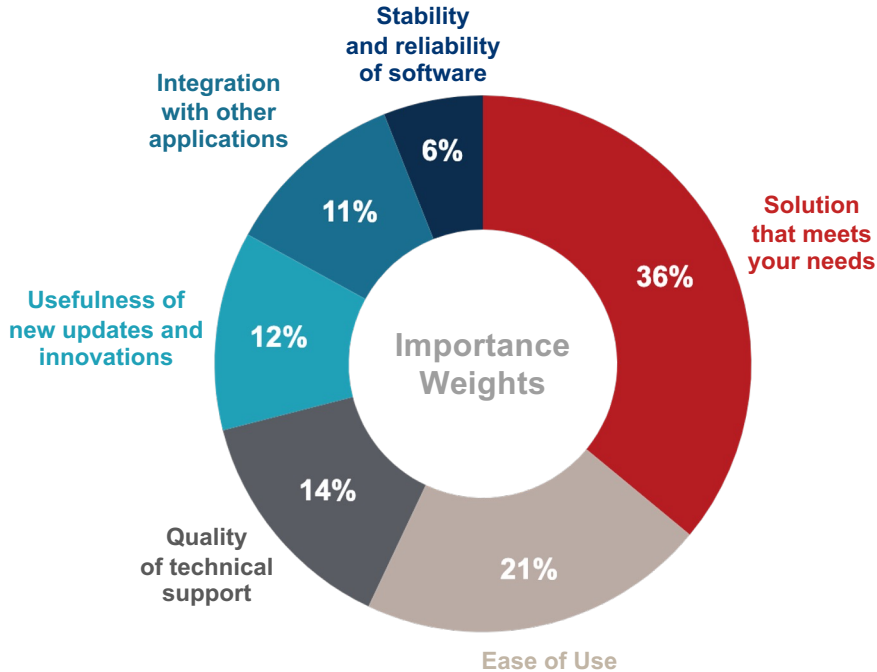
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Technology Solution Ratings (2/2)



End-Users

- While each attribute contributes to the dealer's overall technology experience, the reality is that **some attributes are more important than others**
- The **number one driver of technology satisfaction is how well the solution meets the unique needs of each dealership and department** (*solution that meets your needs*) which makes up 36% of overall satisfaction
- **Usability** (*ease of use*) is the **second most important technology satisfaction driver** across Canadian dealerships

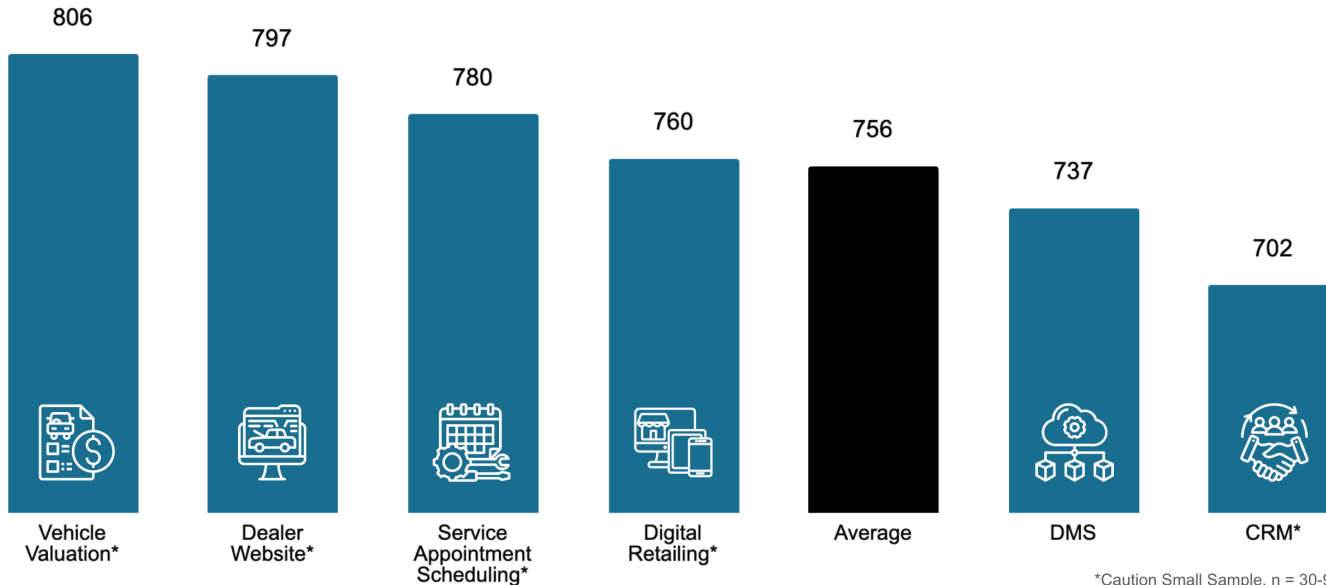
U3. Using a 0-to-10-point scale, where '0' is Completely Dissatisfied and '10' is Completely Satisfied, how would you rate your main [Application] provider on the following...?

n = 288 (Total Ratings n = 518)

Tech Solution Satisfaction Index Scores

STEP 4

Apply the satisfaction impact weights to determine overall satisfaction scores for each of the six technology applications



*Caution Small Sample, n = 30-99

End-Users

- Of the applications rated, **Vehicle Value Valuation tools deliver the most satisfying experience** for users
- Unfortunately for dealers, **two of the most frequently used tech applications they work with every day—CRM and DMS—deliver satisfaction levels below the average**
- **Technology providers now have the insights they need to review what and how they provide solutions to dealers** with particular focus on the Top 2 attributes which combined, represent 57% of overall dealer satisfaction

U3. Using a 0-to-10-point scale, where '0' is Completely Dissatisfied and '10' is Completely Satisfied, how would you rate your main [Application] provider on the following...?

n = 288 (Total Ratings n = 518)

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Determining Improvement Priorities

Weighted Gap Analysis

An analytical technique used to determine the most significant satisfaction improvement opportunities by blending both the **Importance** of each attribute with the **Performance** of the provider compared to the average.

For tech providers, low performance on attributes of high importance to dealers represent the most significant opportunities to improve the dealer experience with their solutions.



LOW PERFORMANCE
HIGH IMPORTANCE
compared to industry average












HIGH PERFORMANCE
HIGH IMPORTANCE
compared to industry average

Application Ratings: DMS

Attribute ratings, gaps and index score

 End-Users

Dealer Management System (DMS) 	Weights	DMS Ratings	Tech Average	Simple Gap	Weighted Gap
Solution that meets your needs	36.8%	 7.49	7.59	-0.10	-3.6
Ease of use	20.6%	 7.35	7.64	-0.29	-6.0 
Quality of technical support	13.8%	 7.53	7.75	-0.22	-3.0
Usefulness of new updates and innovations	11.8%	 6.79	7.14	-0.35	-4.1 
Integration with other applications	11.3%	 7.24	7.33	-0.09	-1.0
Stability and reliability of software	6.1%	 7.76	7.92	-0.16	-1.0
Overall satisfaction with your Application provider	100%	737	756	-1.21	-18.8

- DMS providers have the most significant improvement opportunities in the areas of:

Usability (ease of use)

and

The ability to bring innovation and solution updates that resonate (read: actually help) dealer operations

U3. Using a 0-to-10-point scale, where '0' is Completely Dissatisfied and '10' is Completely Satisfied, how would you rate your main [Application] provider on the following...?

n = 164

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Application Ratings: CRM

Attribute ratings, gaps and index score

 End-Users

Customer Relationship Management (CRM) 	Weights	CRM Ratings	Tech Average	Simple Gap	Weighted Gap
Solution that meets your needs	36.8%	 7.10	7.59	-0.49	-17.8 
Ease of use	20.6%	 6.97	7.64	-0.67	-13.8 
Quality of technical support	13.8%	 7.21	7.75	-0.54	-7.5
Usefulness of new updates and innovations	11.8%	 6.62	7.14	-0.52	-6.1
Integration with other applications	11.3%	 6.86	7.33	-0.47	-5.3
Stability and reliability of software	6.1%	 7.41	7.92	-0.51	-3.1
Overall satisfaction with your Application provider	100%	702	756	-3.20	-53.7

- CRM systems have the most significant improvement opportunities of the tech applications rated when it comes to meeting and exceeding dealership expectations
- The main areas of concern/improvement are:
 - CRM solutions which are flexible enough to meet the unique needs of each dealership*
 - Usability (ease of use)*










U3. Using a 0-to-10-point scale, where '0' is Completely Dissatisfied and '10' is Completely Satisfied, how would you rate your main [Application] provider on the following...?

n = 98

Application Ratings: Dealer Website

Attribute ratings, gaps and index score

 End-Users

Dealer Website 	Weights	Dealer Website Ratings	Tech Average	Simple Gap	Weighted Gap
Solution that meets your needs	36.8%	 7.98	7.59	0.39	14.2 
Ease of use	20.6%	 8.08	7.64	0.44	9.1 
Quality of technical support	13.8%	 8.19	7.75	0.44	6.1
Usefulness of new updates and innovations	11.8%	 7.67	7.14	0.53	6.2
Integration with other applications	11.3%	 7.64	7.33	0.31	3.5
Stability and reliability of software	6.1%	 8.25	7.92	0.33	2.0
Overall satisfaction with your Application provider	100%	797	756	2.44	41.1

- Overall, Canadian retailers are satisfied with dealer website service providers – all weighted gaps are positive

- At least two weighted gaps fall in the upper right quadrant of the 2 x 2 matrix (good performance in areas important to dealers)

Solution meets dealer needs

Ease of use

U3. Using a 0-to-10-point scale, where '0' is Completely Dissatisfied and '10' is Completely Satisfied, how would you rate your main [Application] provider on the following...?

n = 89

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Application Ratings: Digital Retailing

Attribute ratings, gaps and index score

 End-Users

Digital Retailing 	Weights	Digital Retailing Ratings	Tech Average	Simple Gap	Weighted Gap
Solution that meets your needs	36.8%	 7.44	7.59	-0.15	-5.5 
Ease of use	20.6%	 7.96	7.64	0.32	6.6 
Quality of technical support	13.8%	 7.84	7.75	0.09	1.2
Usefulness of new updates and innovations	11.8%	 7.44	7.14	0.30	3.5
Integration with other applications	11.3%	 7.31	7.33	-0.02	-0.2
Stability and reliability of software	6.1%	 7.58	7.92	-0.34	-2.1
Overall satisfaction with your Application provider	100%	760	756	0.20	3.6

- Digital Retailing solutions scored slightly above the average in the research study
- The most significant improvement opportunity for digital retail providers is *ensuring the solution is configured to the unique needs of each dealer*
- However, once up-and-running, **end users find digital retailing solutions easy to use**

U3. Using a 0-to-10-point scale, where '0' is Completely Dissatisfied and '10' is Completely Satisfied, how would you rate your main [Application] provider on the following...?

n = 45

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Application Ratings: Service Scheduling

Attribute ratings, gaps and index score

 End-Users

Service Appointment Scheduling 	Weights	Service Appointment Ratings	Tech Average	Simple Gap	Weighted Gap
Solution that meets your needs	36.8%	 7.70	7.59	0.11	4.0
Ease of use	20.6%	 7.95	7.64	0.31	6.4 
Quality of technical support	13.8%	 8.08	7.75	0.33	4.6
Usefulness of new updates and innovations	11.8%	 7.35	7.14	0.21	2.5
Integration with other applications	11.3%	 7.60	7.33	0.27	3.0
Stability and reliability of software	6.1%	 8.43	7.92	0.51	3.1
Overall satisfaction with your Application provider	100%	780	756	1.74	23.6

- **Service Scheduling tools** scored above average with Canadian dealerships end users
- This is an encouraging finding given that other industry research has shown consumers express some frustration regarding the ease of arranging a service visit
- Dealers need to continue their efforts to educate consumers on the availability of these online tools and how to use them

U3. Using a 0-to-10-point scale, where '0' is Completely Dissatisfied and '10' is Completely Satisfied, how would you rate your main [Application] provider on the following...?

n = 63

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Application Ratings: Vehicle Valuation

Attribute ratings, gaps and index score

 End-Users

Vehicle Valuation 	Weights	Vehicle Valuation Ratings	Tech Average	Simple Gap	Weighted Gap
Solution that meets your needs	36.8%	 8.07	7.59	0.48	17.5 
Ease of use	20.6%	 8.32	7.64	0.68	14.0 
Quality of technical support	13.8%	 8.20	7.75	0.45	6.2
Usefulness of new updates and innovations	11.8%	 7.71	7.14	0.57	6.7
Integration with other applications	11.3%	 7.59	7.33	0.26	2.9
Stability and reliability of software	6.1%	 8.42	7.92	0.50	3.1
Overall satisfaction with your Application provider	100%	806	756	2.94	50.4

- Vehicle Valuation solutions are the most satisfying of all tech categories ranked in CARTS, performing strongly in:
 - Meeting dealer needs
 - Ease of use
- The lower satisfaction score on *Integration with other applications* suggests this is an area of potential improvement for providers with the potential for this attribute to become a competitive advantage for strong performers

U3. Using a 0-to-10-point scale, where '0' is Completely Dissatisfied and '10' is Completely Satisfied, how would you rate your main [Application] provider on the following...?

n = 59

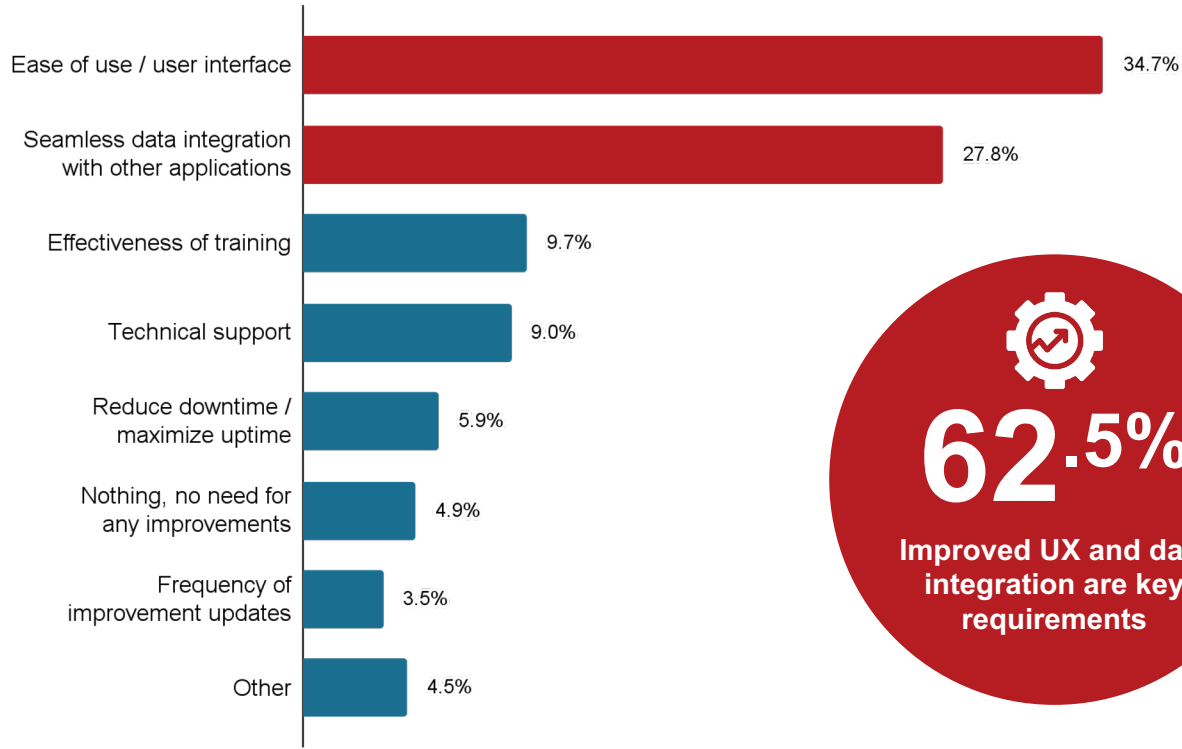
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Most Important Improvement Area



62.5%
Improved UX and data integration are key requirements

End-Users

- Overall end users focused their improvement feedback in two key areas (collectively representing 62.5% of respondents):
 - A desire for improvements to the user interface/ease of use
 - Seamless data integration with other applications
- Focus in these two critical areas will pay dividends for both technology vendors and their clients

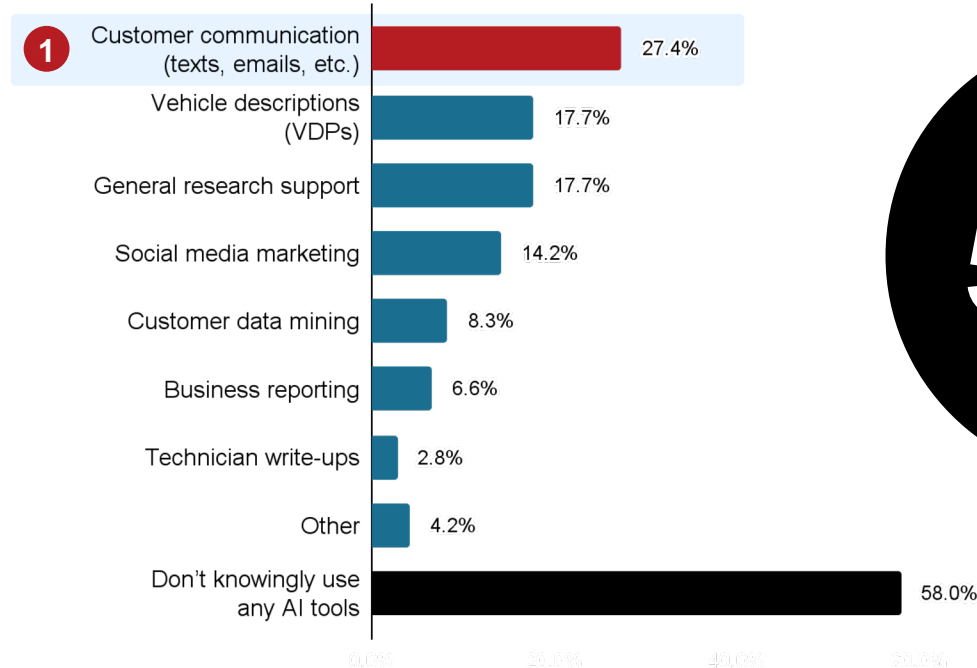
U6. When considering the different software applications you use in-store, what is the most important thing providers need to improve?

n = 288

Artificial Intelligence Usage (1/2)

Share of Responses (%)

(Multiple response options)



U7. Are you using Artificial Intelligence (AI) for any of the following?

n = 288

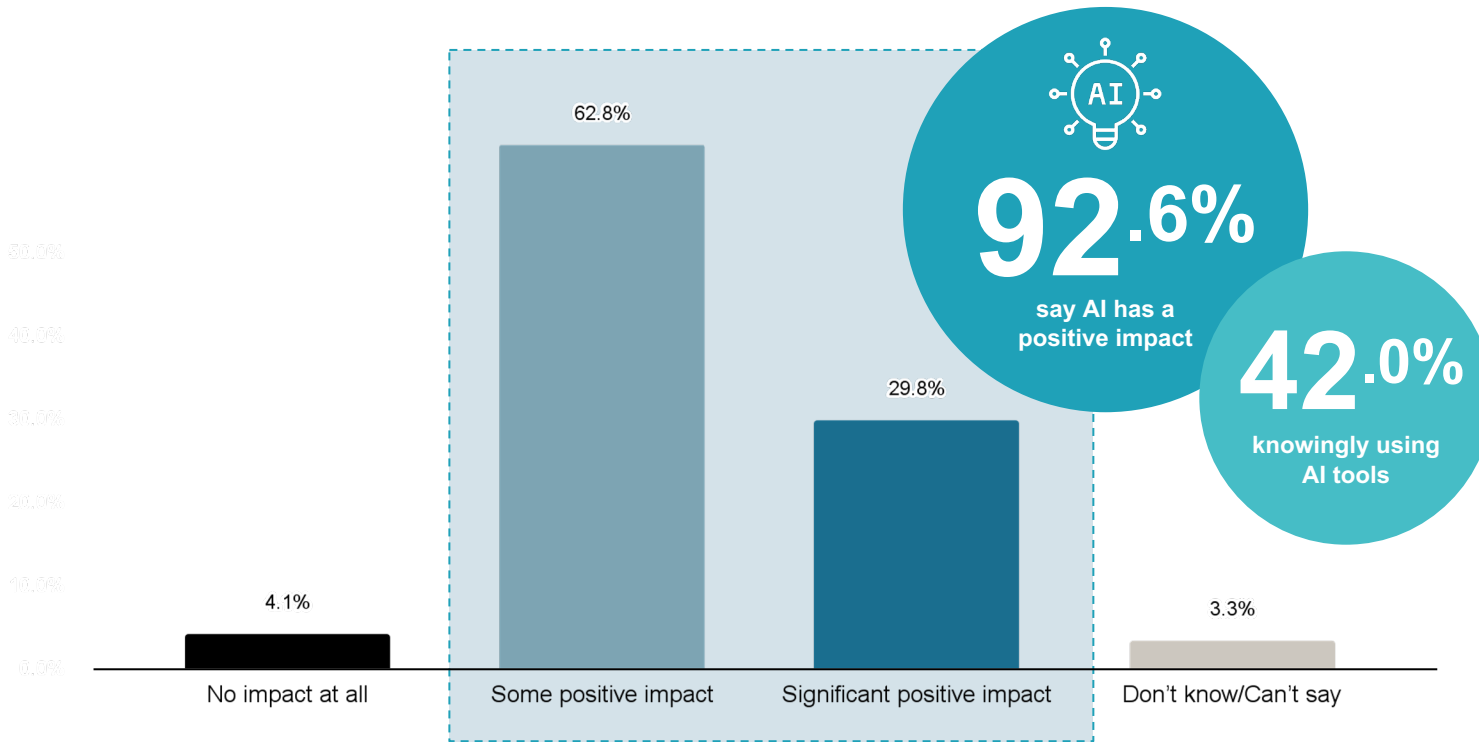
End-Users

- The most common way dealerships are using AI today is to **automate repetitive tasks** such as *customer communication* and *vehicle descriptions*
- However, these **use cases are only evident in a minority of dealerships** — approximately 1 in 4 (communications) and 1 in 5 (vehicle descriptions)
- Given how new AI technology is, careful quality control, frequent verification of AI outputs, and attention to customer feedback is critical until AI reaches a mature state
- A large number of users (58.0%) are not yet making use of AI in their daily workflows suggesting **there is significant untapped efficiency gains to be made going forward**

Artificial Intelligence Usage (2/2)

End-Users

- For those end users deploying AI tools, the vast majority feel their impact is positive—a combination of 'some' and 'significantly' positive
- Over 2 in 5 respondents (42.0%) report using AI tools
- The overwhelmingly positive impact reported suggests that the large number of retailers (58.0%) not using AI should invest time and effort to explore how these tools can help their operations



U8. How much of an impact does AI have in making you work more efficiently?

n = 121

Dealer's Advice on Technology (1/2)

Some programs aren't well designed and they end up making things more difficult for front-end staff. Management needs to care more about them to reduce turnover. One program I highly recommend is "....." because it helps the parts department in various ways, and certain brands offer special return agreements when ordering through it.

-#125, Single Rooftop, Single Brand, British Columbia

Before bolting on to your DMS, make sure you are using your DMS to its fullest capacity. Introduce one piece of technology at a time, work it into your business/process, make it work, measure results, make it work better, hold the supplier accountable and then determine if you need to introduce anything more.

- #89, Single Rooftop, Single Brand, Atlantic

... A dealership should also consider that, with all of the service and software providers out there, is the ROI they are receiving from their current provider actually worth it? Some of these providers can be VERY expensive, and are outclassed, outperformed, and offered at a lower cost by other providers in a highly competitive space. Especially when it comes to marketing, and lead generation.

- #358, Single Rooftop, Single Brand, Atlantic



Decision-Makers



End-Users

D7. Is there a technology provider in any part of your business that you feel has been particularly supportive? And briefly why?

n = 261

Dealer's Advice on Technology (2/2)

Whatever suits your culture. Don't ruin that.

- #158, Single Rooftop, Single Brand, Ontario

Ask for free trials. Test everything that you can.

Get recommendations from other dealers. There's a lot of crap out there.

- #241, Multi-Rooftops, Multiple-Brands, Ontario

Look for vendors that offer multiple technologies to avoid having too many different vendors and too many portals.

- #112, Single Rooftop, Multiple Brands, Québec

Focus on tools that will significantly reduce operational expense and maximize productivity but not directly impact revenues if system is unsuccessful, ie: not directly changing frontline, public facing operations. Focus on maximizing internal operational efficiencies, first.

- #545, Single Rooftop, Single Brand, British Columbia



Decision-Makers



End-Users

D7. Is there a technology provider in any part of your business that you feel has been particularly supportive? And briefly why?

n = 261

Recommendations

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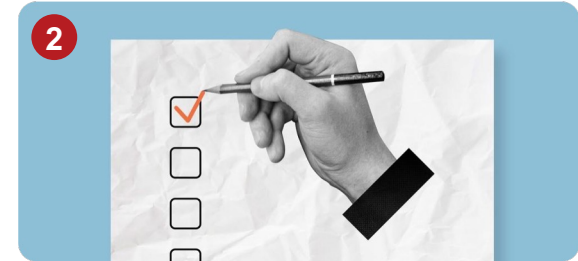
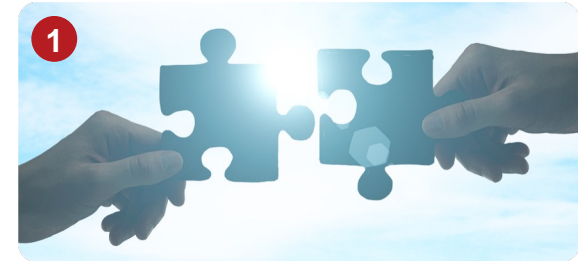
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Recommendations (1/4)

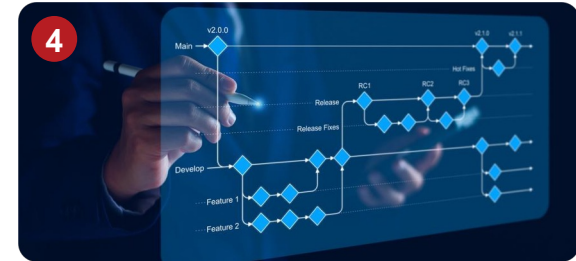
There are tremendous opportunities for dealers to improve their businesses through technology. At the same time, the CART Study reveals some key considerations and cautionary findings that dealers need to keep in mind:

1. The most significant technology adoption challenge for dealers is not the quality of the code or software capabilities, **it's the alignment between the solution's capabilities and the needs of your business.** Extensive feature sets only matter if your business will actually use them. There are great products out there that might not be right for **your** specific operation.
2. **When meeting with vendors, ensure the conversation emphasizes your business needs, not the technology's features.** If the business benefit isn't clear before implementation, it will likely remain unclear afterward, and may be the first sign of a poor investment that can be avoided.
3. Technology support and training are important, but applications that are intuitive to use can dramatically improve adoption and reduce the need for ongoing support throughout the product's lifespan. **If an application is difficult for your staff to use, it might not be the right fit your business.**



Recommendations (2/4)

- Integrating new technology with existing tools continues to be a real challenge for dealers. Make sure you **fully understand how a new technology or tool will integrate into your current systems and workflows**. A vendor should contractually commit to any required integration. **Remember that integration with physical workflows matters too—it's not just about how technologies work together.** Having to navigate extra screens or exit one tool to enter another can seriously hinder adoption as most dealership staff simply don't have the time.
- Consider the needs of your entire business.** Dealers are learning how to use the latest tech apps for sales and marketing, but **fixed operations** is an area that will develop much further in the future. **The technologies you use in your service department can dramatically impact your customers' ongoing experience with your dealership, helping to drive retention and word-of-mouth referrals.**
- While incremental and focused adoption is valuable, **be careful not to move too slowly in a fast-moving tech landscape.** Balancing the need to learn with the need to act is challenging. **The more you focus your conversations on the business needs and impacts of technology, the more confidently you'll be able to move forward.** Engaging with dealer peers and your OEMs will be essential as you continue learning.



Recommendations (3/4)

7. Artificial Intelligence (AI)** is widely regarded as the “next wave” in retail technology. Nearly 3 in 5 decision-makers report using AI in some fashion.

However, the impact of AI is mixed. Of those who have implemented AI, nearly 1 in 3 decision-makers report it has improved the overall customer experience. At the same time, 3 in 10 dealers report AI has not delivered any noticeable impact and in a few cases, caused process inconsistencies and customer complaints.

This dichotomy suggests there is **considerable room to improve AI adoption effectiveness**. While dealers may be feeling a sense of AI urgency, the feedback from decision-makers is clear: **regardless of size, dealers must carefully evaluate and plan how AI will be introduced and integrated across their business**.

For dealers: This means clearly defining the problem to be solved. It means challenging vendors to demonstrate how their solution will address your specific business needs, without getting caught up in a long list of features.

For tech providers: This means selling by asking, not by telling. The key driver of dealer satisfaction is not the length of the feature set, it is the fit between the tech and the dealer’s business need.

*** Note: AI has been recognized by the CADA as a critical technology with the formation of a Industry Relations subcommittee on this topic with the goal of providing ongoing insights and recommendations to Canadian retailers.*



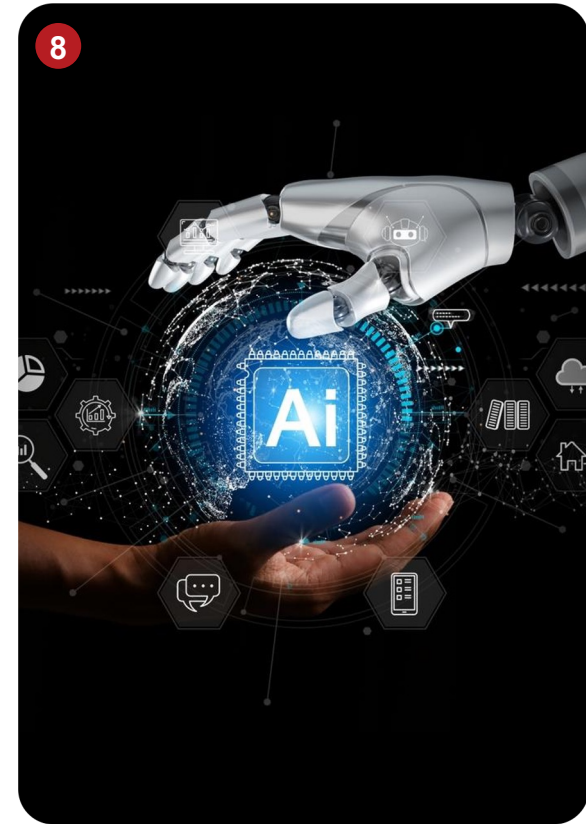
Recommendations (4/4)

8. CARTS reveals a significant gap in AI adoption between **decision-makers (60%)** and **dealership team members (42%)**. Of those team members (end-users) who have tried AI, the **vast majority (93%)** report it has boosted their personal productivity.

This AI adoption gap suggests that **staff may be using AI tools like ChatGPT and Google Gemini without much, if any, management oversight.**

While AI has the potential to deliver significant benefits, it also has the potential to create risks including inconsistent application, inefficiencies, poor customer experiences, privacy breaches, and potential gaps within the dealership's overall technology stack.

Dealers need to establish clear direction and governance with respect to AI adoption across the business including, for example, the use of approved AI tools only.



Dealer Respondent Profile

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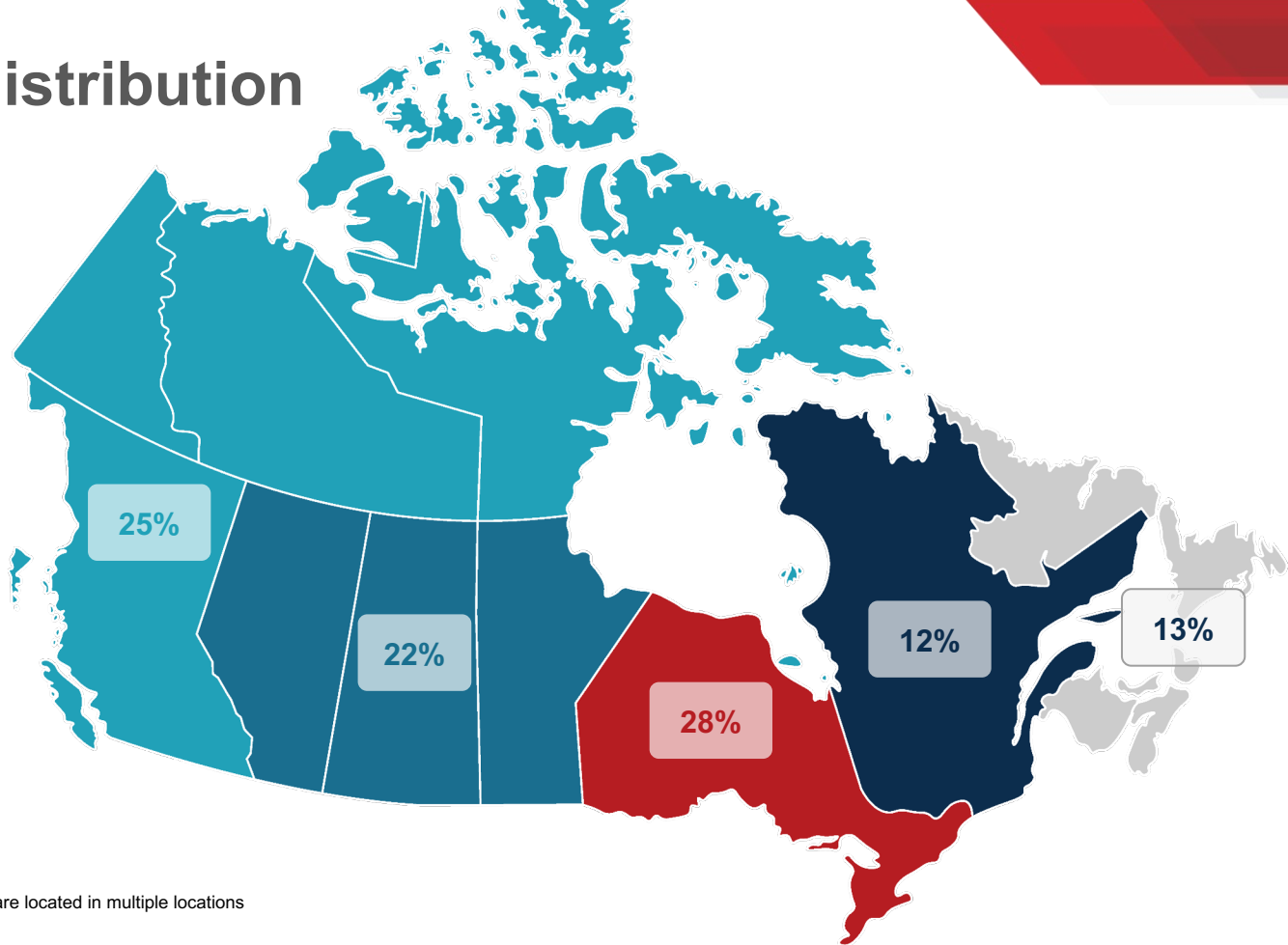
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Regional Distribution

Share of Responses (%)



Total Sample Size = 549

Share rebased to 100%, some dealers are located in multiple locations

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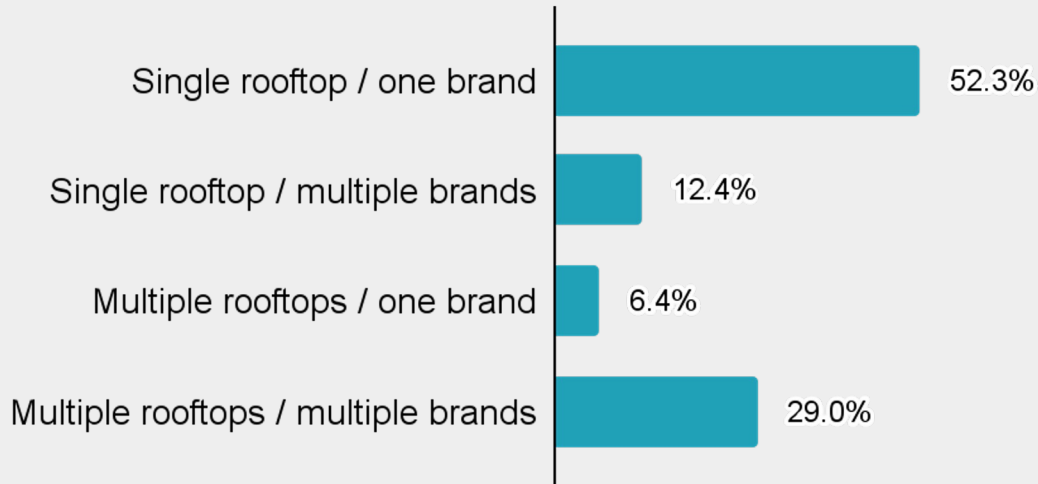
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Respondent Summary

Dealer Size



64.7%  Single Rooftop

58.7% **1** Single Franchise

35.4%  Multiple Rooftops

All 2. Is your dealership...?

n = 549

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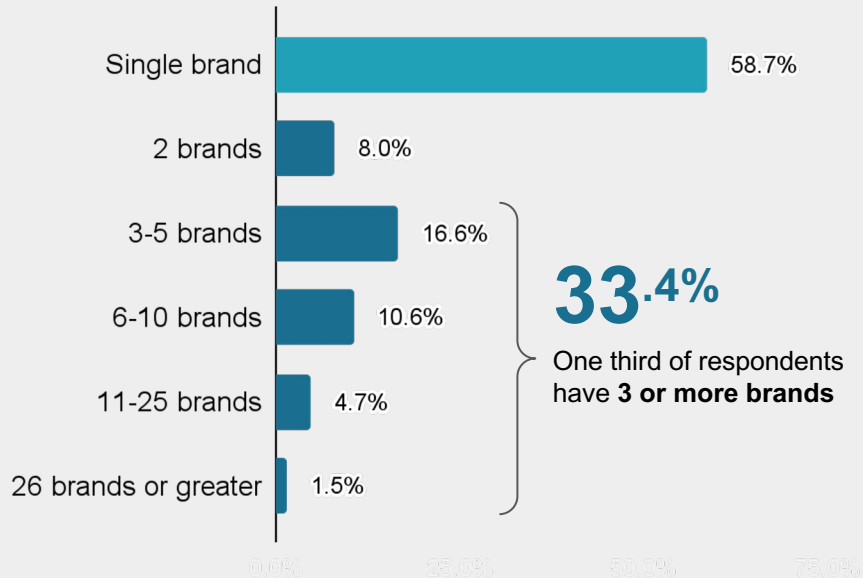
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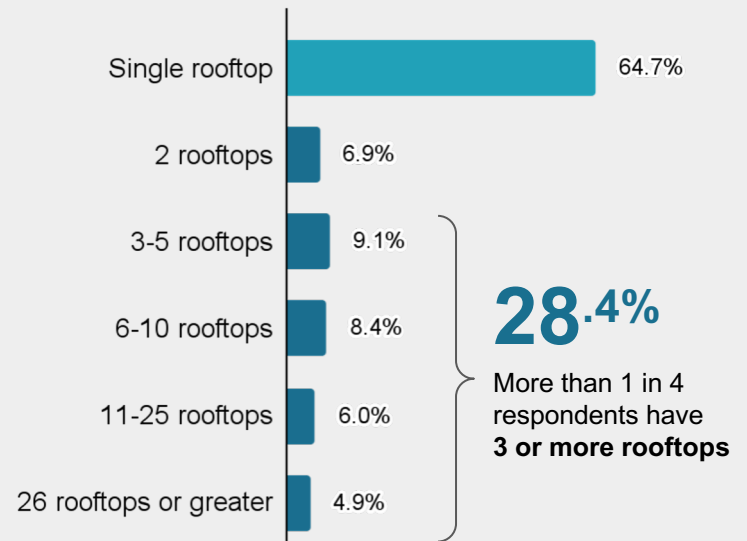


Distribution by Dealer Size

Brand Coverage



Number of Rooftops



All 3. How many brands does your business include?

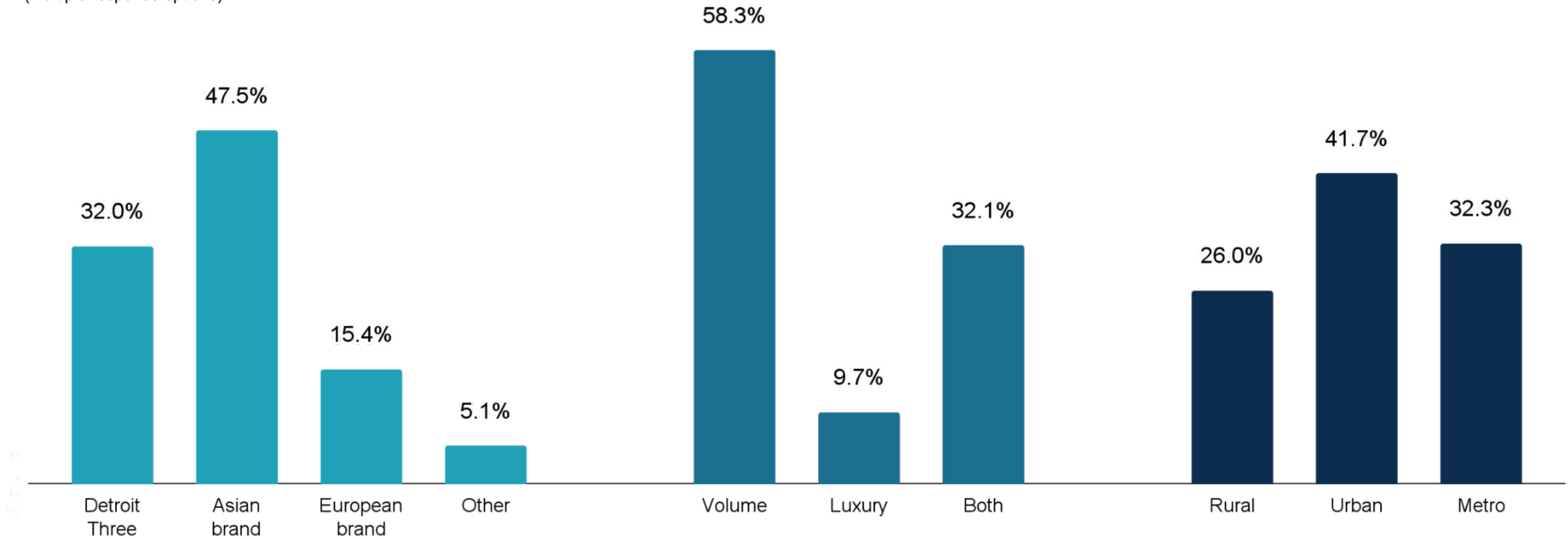
All 5. How many store(s) (rooftops) does your business have?

n = 549

Distribution by Brand

Share of Responses (%)

(Multiple response options)



All 4. Which types of brands do you represent in your dealership(s)

All 8. Does your franchise(s) represent volume brand(s), luxury brand(s), or both?

All 7. How would you best describe the location of your store(s)?

n = 549, Responses to All4 and All7 have been rebased to 100%

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Respondent Summary

Role	Study Total	Decision-Makers	End-Users
Senior Leadership (Owner, DP, Chair, CEO, COO, President)	21.3%	33.0%	10.8%
General Manager	25.5%	29.1%	22.2%
Finance (CFO, VP of Finance, Finance Director)	1.5%	3.1%	0.0%
Controller, Accounting / Administration Manager	5.5%	4.6%	6.3%
CTO / IT / Marketing (VP, Director, Manager)	3.3%	5.7%	1.0%
Sales (Director, Manager, Consultant)	15.8%	10.3%	20.8%
Aftersales / Fixed Operations (Director, Manager, Advisor)	14.2%	10.7%	17.4%
Parts (Director, Manager, Advisor)	4.7%	0.4%	8.7%
F&I (Manager, Business Manager, Financial Services Manager)	5.8%	2.3%	9.0%
Other	0.9%	0.4%	1.4%
Prefer not to respond	1.5%	0.4%	2.4%
Sample Base (n)	549	261	288

All 1. What is your job title?

n = 549

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Study Methodology

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Online Survey Summary

Fieldwork

- Conducted between June 17 and July 21, 2025
- CADA emailed invitations to all franchised dealers in Canada with 3 reminders sent on June 19, 25 and July 2

Sample

- Provided by CADA with additional contact records from the Clarify *Canadian New Vehicle Dealer Database*
- Total number of unique email addresses contacted: 15,624 with 15,314 emails deliverable

Eligible Respondents

- **Decision-Makers:** Leaders of Canadian franchised dealerships or groups with responsibility for any part of the strategic direction, investment, financing or operations of a franchised new vehicle dealership in Canada
- **Users:** Key technology users in a dealership including Sales, Aftersales, F&I and Marketing staff

Response

- **549** fully completed surveys: **261 Decision-Makers** and **288 Users** (including some Decision-Makers)

Sponsorship

- CADA and Clarify are grateful for the generous sponsorship of the CART Study by Royal Bank of Canada

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