

The Road Ahead: Canada's Automotive Retail Technology Study

4 - 6 November 2025



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How We Got Here



Technology is the next competitive advantage in automotive retail

- Auto retail undergoing digital transformation
- Dealers need clarity on what's working, what's not, and where to invest
- CART Study provides a data-driven roadmap

Study commissioned: Fall 2024

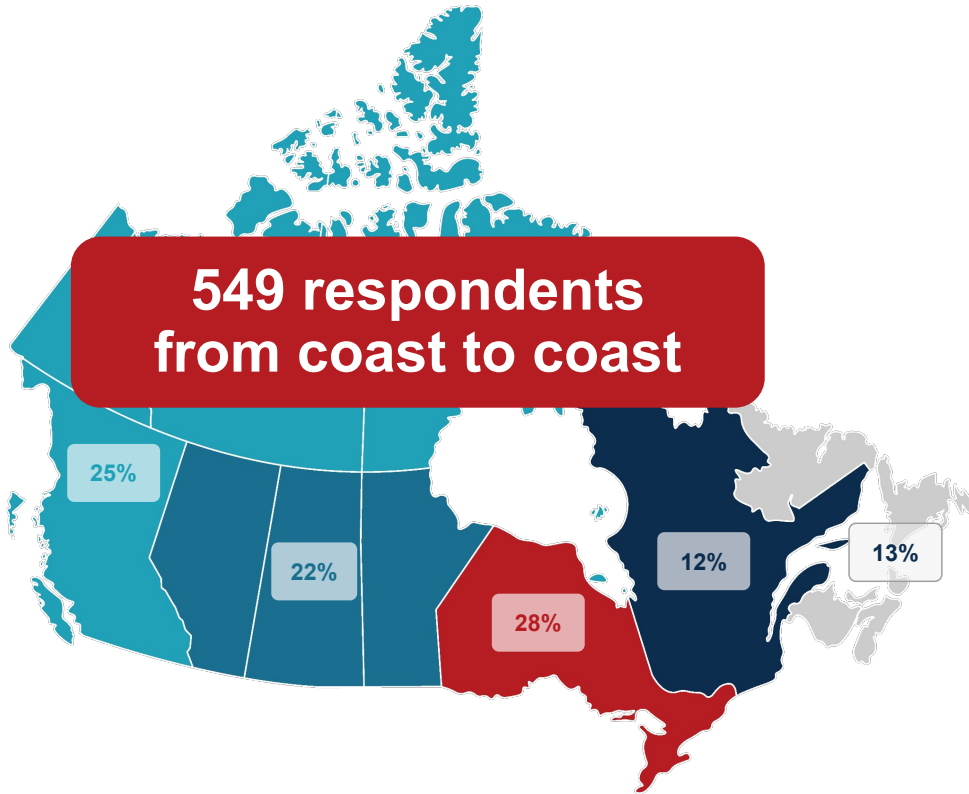
Survey fieldwork: June-July 2025

The mandate:

- Benchmark the state of technology in Canadian auto retail
- Identify tech investment priorities, measure satisfaction and tech adoption appetite
- Understand the readiness for AI transformation

Research powered by **Clarify**

Voice of the Dealer



261 Decision-Makers



288 End-Users



65% Single Rooftop



35% Multiple Rooftops



59% Single Franchise



41% Multiple Franchises

INSIGHTS FROM **Decision-Makers**

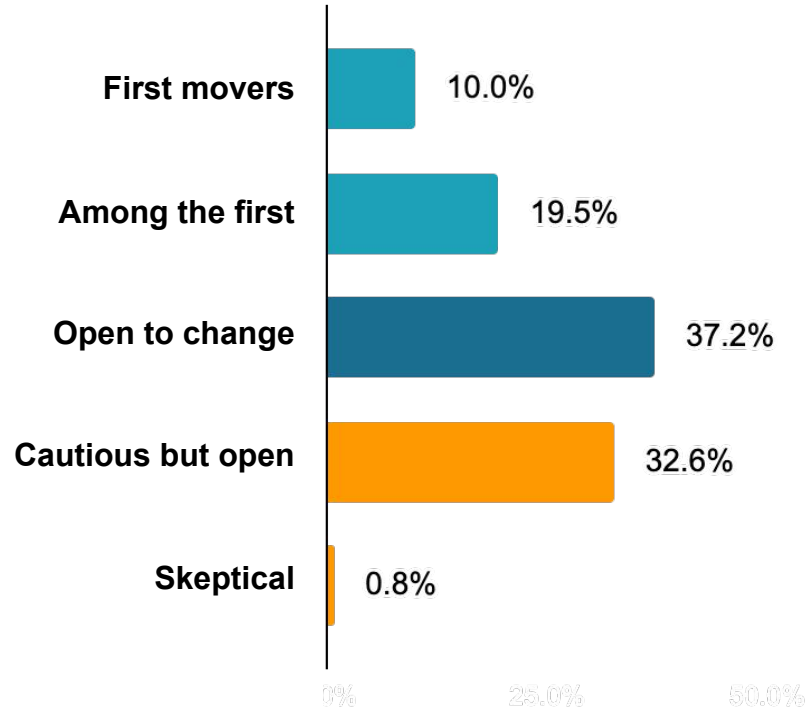



Tech Receptivity

? We asked...

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

Dealers fall into three camps.



 Decision-Makers

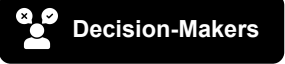
30%
early adopters

37%
cautious implementers

33%
lagging behind peers

n = 261

Top Investment Areas (Next 12 Months)



? We asked...

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

Which of these technology investment areas is your priority?



Dealer Verbatim



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

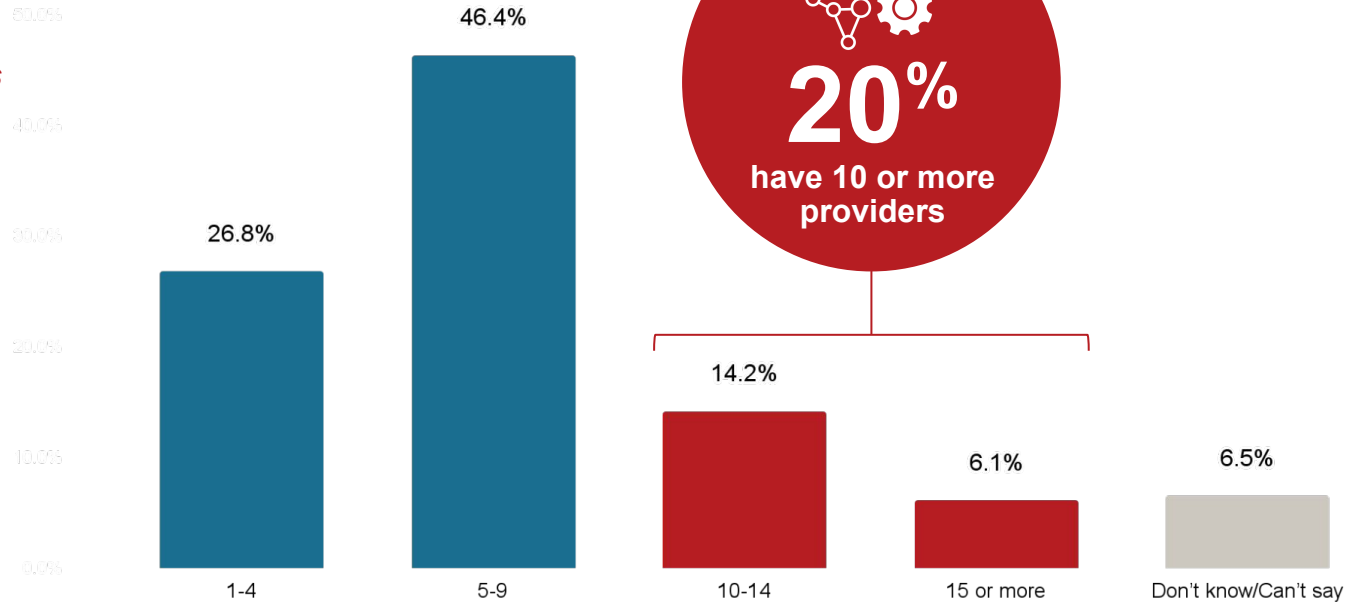
We've adopted a CDP (Customer Data Platform) that proactively reaches out to our clients based on data as well as behaviour (clicking on email links, browsing websites, clicking on ads). We also employ AI chat/texting.

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

Dealer Tech Stack Provider Profile

 We asked...

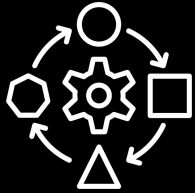
In total, how many applications and technology providers do you use or subscribe to?



Top 5 Friction Points

 Decision-Makers

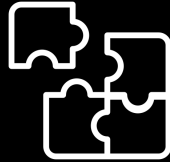
CHALLENGE #1



59%

Using the solution to its full capability

CHALLENGE #2



55%

Successful integration with daily operations

CHALLENGE #3



48%

Justifying investment and measuring ROI

CHALLENGE #4



41%

Obtaining the right level of training and support

CHALLENGE #5

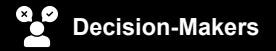


40%

Finding the right staff to support new technology

It's not the code—it's the implementation.

Dealer Verbatim



**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

**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.**

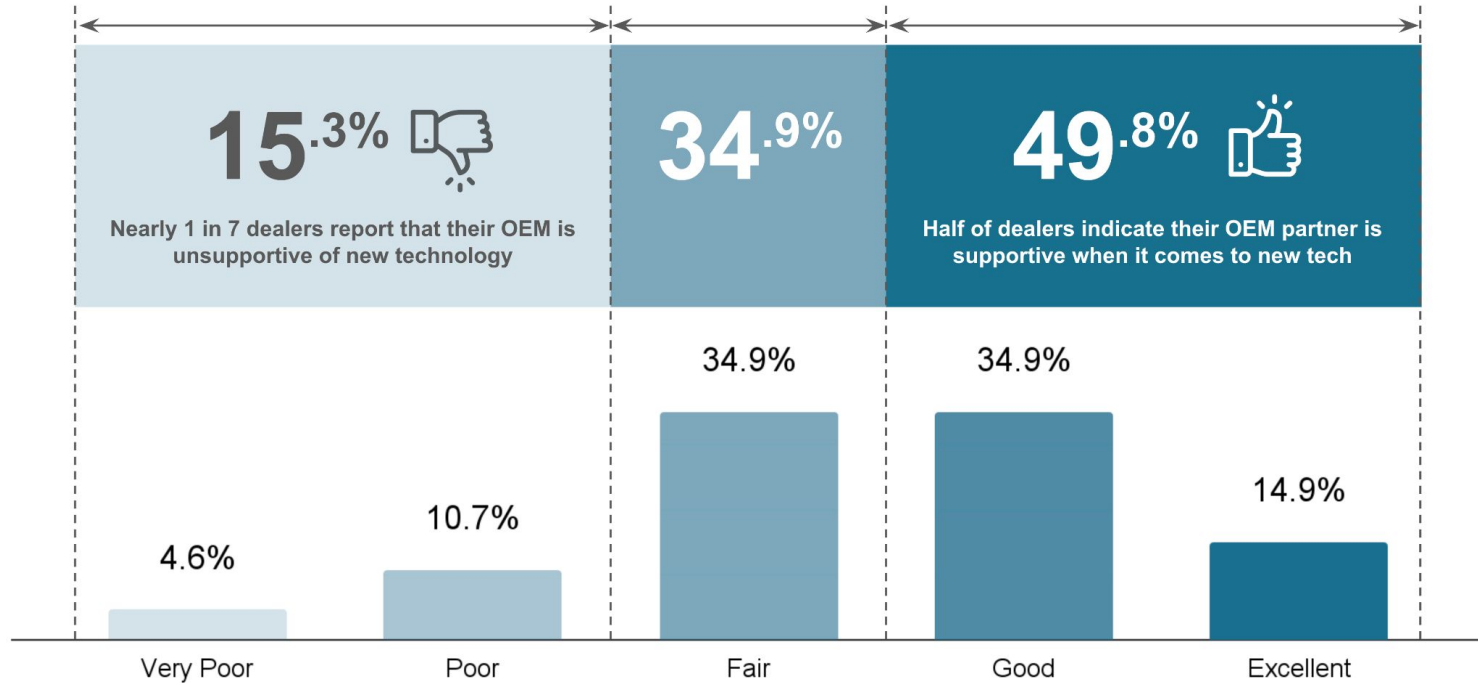
– #89, Single Rooftop, Single Brand, Atlantic

OEM Support


 We asked...

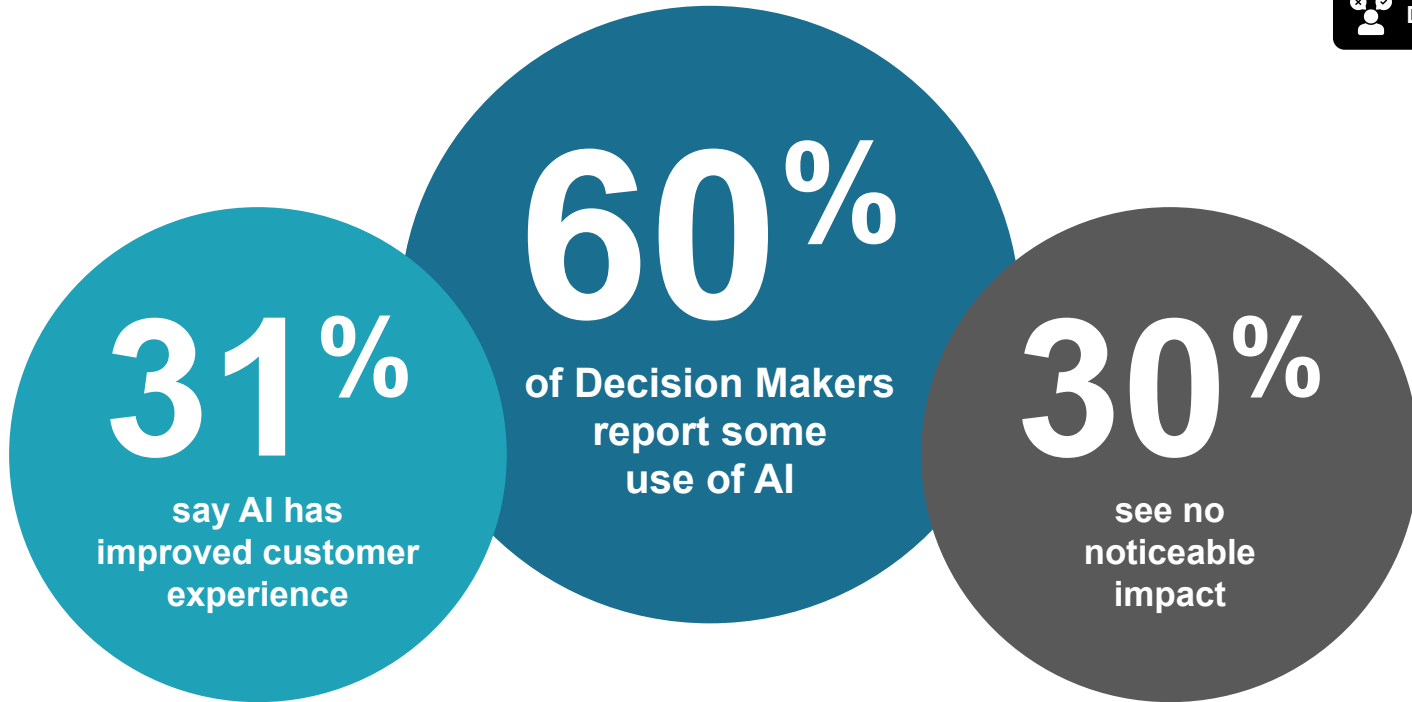
 Decision-Makers

How supportive is your OEM franchise partner(s) in supporting new technology?



Current State of AI Adoption

 Decision-Makers



AI is here—but unevenly deployed.

INSIGHTS FROM **End-Users**



6 applications rated across 6 attributes

 End-Users

 We asked...

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...?



DMS



CRM



Dealer Website



Digital Retailing



Vehicle Valuation



Service Appointment Scheduling

Solution that meets your needs

Ease of use

Quality of technical support

Usefulness of new updates and innovations

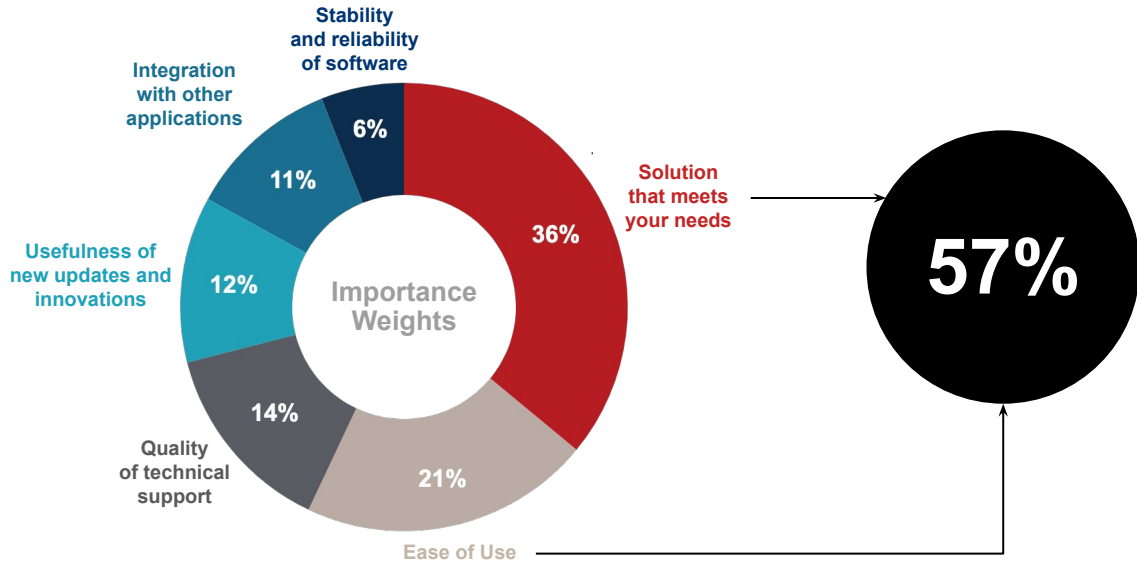
Integration with other applications

Stability and reliability of software

Satisfaction Index Importance Weights

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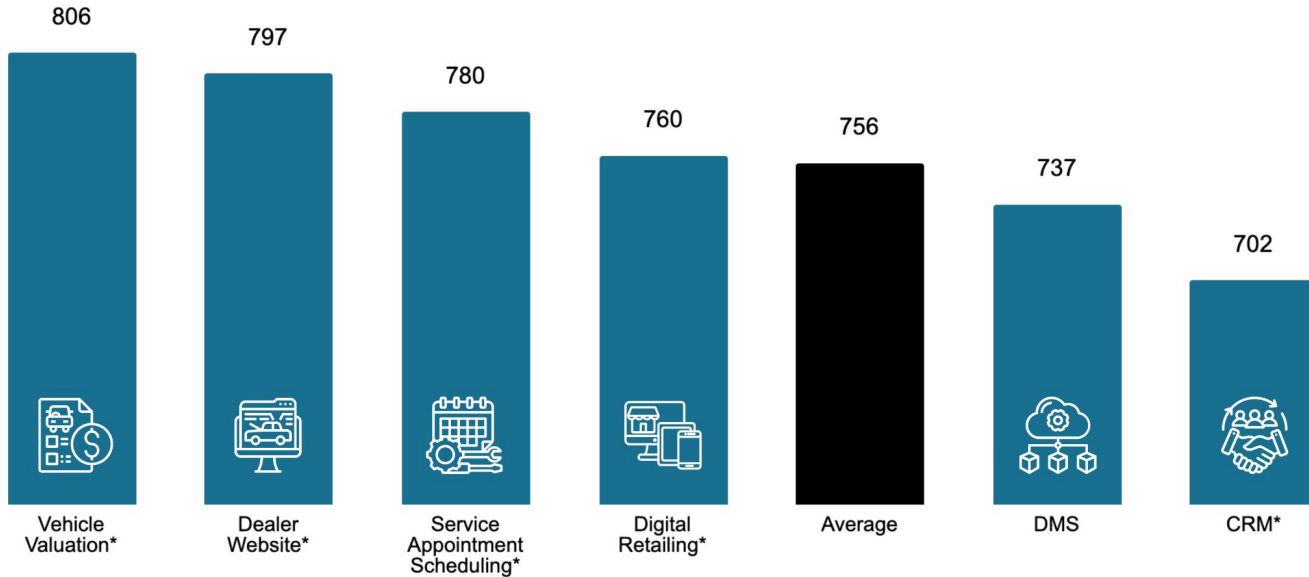


Tech Solution Satisfaction Index Scores

 End-Users

 We asked...

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...?



*Caution Small Sample, n = 30-99










Determining Improvement Priorities

 End-Users

Weighted Gap Analysis

 **LOW PERFORMANCE
HIGH IMPORTANCE**
compared to industry average

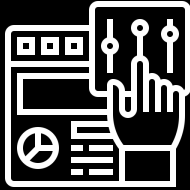
 **HIGH PERFORMANCE
HIGH IMPORTANCE**
compared to industry average

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/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 provider	100%	702	756	-3.20	-53.7

Top 3 Improvements End-Users Want

 End-Users

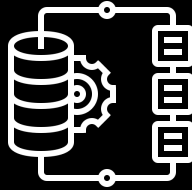
PRIORITY #1



35%

Ease of use
and user interface

PRIORITY #2



28%

Seamless data
integration with
other applications

PRIORITY #3



10%

Effectiveness
of training

PRIORITY #4



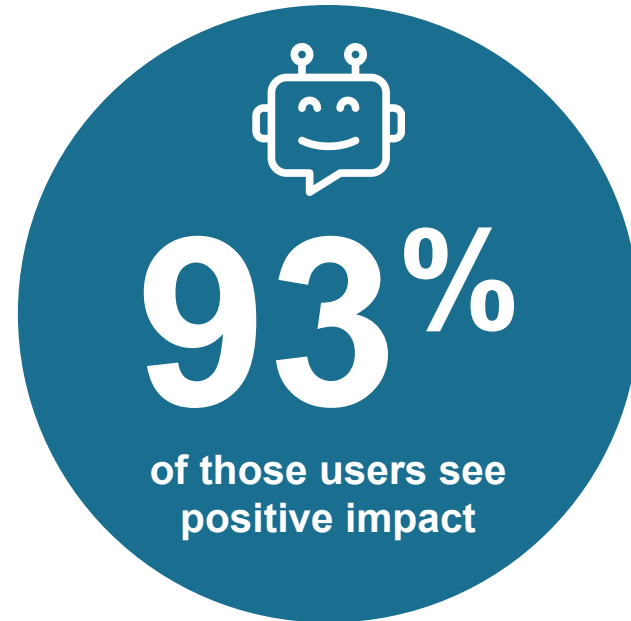
9%

Technical
support

Improved UX and data integration are key requirements.

End-User adoption of AI in the Workplace

 End-Users



AI can have massive upside—but requires guidance and governance.

6 Key Recommendations

1

**ALIGN SOLUTIONS
WITH BUSINESS
GOALS**

2

**PRIORITIZE
USABILITY**

3

**VENDOR
INTEGRATION
EFFECTIVENESS**

4

**CONSIDER
YOUR ENTIRE
BUSINESS**

5

**BALANCE THE NEED
TO ACT WITH THE
NEED TO LEARN**

6

**GOVERN AI
RESPONSIBLY**

Make technology work for your business—not the other way around.

Ask yourself...

What's one technology or application in my dealership that isn't pulling its weight?

What's our next step to leverage tech to drive enhanced bottom line results?

Your role in shaping the future



Participate in next year's CART Study to help shape the future of Canadian retail automotive. Look for your invitation coming in Q2 2026.

Every response helps strengthen the insights we share next year.

The CART Study only exists because dealers across Canada take time to contribute.

Sneak Peek: Dealer Snapshots

THE ROAD AHEAD: CANADA'S AUTOMOTIVE RETAIL TECHNOLOGY STUDY

METRO DEALER SNAPSHOT

TECH SOLUTIONS

DEALER TECH SOLUTION INDEX SCORE

STUDY AVERAGE

The Dealer Tech Solution Index score is a weighted aggregated score of six different satisfaction attributes using a 0-10 satisfaction scale across all dealerships:

Attribute	Weight
Solution that meets your needs	36%
Ease of use	21%
Quality of technical support	14%
Usefulness of new updates and innovations	12%
Integration with other applications	11%
Stability and reliability of software	6%

Tech Solution	Score
VEHICLE VALUATION**	806
DEALER WEBSITE**	797
SERVICE APPOINTMENT SCHEDULING**	780
DIGITAL RETAILING**	760
AVERAGE	756
DMS	737
CRM**	702

**Small sample, n=30-09

DECISION-MAKERS

Approach to New Technologies

Attitude	METRO	STUDY AVG
First movers	16.8%	10.0%
Among the first	27.4%	18.5%
Open to change	27.4%	37.2%
Cautious but open	28.4%	32.6%
Skeptical	0.0%	0.8%

Top 3 Priority Investment Areas

Area	METRO	STUDY AVG
Lead management and response	17.6%	16.3%
Digital advertising SEO	8.8%	15.9%
Cybersecurity - Fraud prevention	11.0%	9.8%

Top 3 Tech Adoption Challenges

Challenge	METRO	STUDY AVG
Using the solution to its full capability	58.9%	59.0%
Integration into daily operations	60.0%	54.8%
Value justification/measuring ROI	43.2%	47.9%

OEM Support

Support Level	METRO	STUDY AVG
Excellent	17.9%	14.9%
Good	32.6%	34.9%
Fair	34.7%	34.9%
Poor	11.6%	10.7%
Very Poor	3.2%	4.6%

DEALER SNAPSHOT NAVIGATION MENU

Regional: BC & TERRITORIES | PRAIRIES | ONTARIO | QUÉBEC & ATLANTIC

Dealer Size: SINGLE-POINT FRANCHISE | MULTI-POINT FRANCHISE

Location: RURAL | URBAN | METRO

* Please note: For respondents with multiple dealership locations, responses are recorded across multiple categories

END-USERS

Application Usage

Application	METRO	STUDY AVG
DMS	94.7%	92.4%
Dealer website	68.4%	71.9%
CRM	64.0%	69.8%
Vehicle valuation	42.1%	49.3%
Digital retailing	39.5%	43.8%
Service appt scheduling	45.6%	41.0%
None of these	4.4%	3.1%

Top 3 Most Important Improvement Areas

Area	METRO	STUDY AVG
Ease of use / user interface	35.1%	34.7%
Seamless data integration	29.8%	27.8%
Effectiveness of training	11.4%	9.7%

Artificial Intelligence Usage

AI Use Case	METRO	STUDY AVG
Social media marketing	13.2%	14.2%
Customer communication	32.5%	27.4%
Customer data mining	13.2%	8.3%
Vehicle descriptions (VDPs)	19.3%	17.7%
Technician write-ups	1.8%	2.8%
Business reporting	8.8%	6.6%
General research support	21.1%	17.7%
Other	5.3%	4.2%
Don't knowingly use any AI	54.4%	58.0%

Sneak Peek: Dealer Snapshots

THE ROAD AHEAD: CANADA'S AUTOMOTIVE RETAIL TECHNOLOGY STUDY

SINGLE-POINT FRANCHISE DEALER SNAPSHOT

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Top 3 Priority Investment Areas

Area	Single-Point	Study Avg
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Cybersecurity - Fraud prevention	10.9%	9.8%

Top 3 Tech Adoption Challenges

Challenge	Single-Point	Study Avg
Using the solution to its full capability	59.7%	59.0%
Integration into daily operations	54.9%	54.8%
Value justification/measuring ROI	48.6%	47.9%

OEM Support

Satisfaction Level	Single-Point	Study Avg
Excellent	17.4%	14.9%
Good	32.6%	34.9%
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General research support	12.4%	17.7%
Other	2.8%	4.2%
Don't knowingly use any AI	63.5%	58.0%

Access the CART Study Report and Dealer Snapshots today on the CADA website:



So how do I get the CART Study?



cada.ca > Knowledge > Reports > The Road Ahead

**Access the CART Study Report and
Dealer Snapshots today on the CADA website:**



THANK YOU


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