

2026 2026 2026 2026 2026



VOICE OF THE CUSTOMER



THE 2016 REPORT

THIS REPORT IS BROUGHT TO YOU BY WIDEWAIL

WHY WIDEWAIL IS DIFFERENT

WIDEWAIL IS THE ONLY FIRM THAT CAPTURES AND ANALYZES 100% OF GOOGLE REVIEWS FOR EVERY AUTOMOTIVE DEALER IN THE U.S. EACH MONTH.

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Widewail did exactly what they said it would, and generated far more reviews without the extra effort."

Chuck Dortenzio
General Manager, Curtiss Ryan Honda



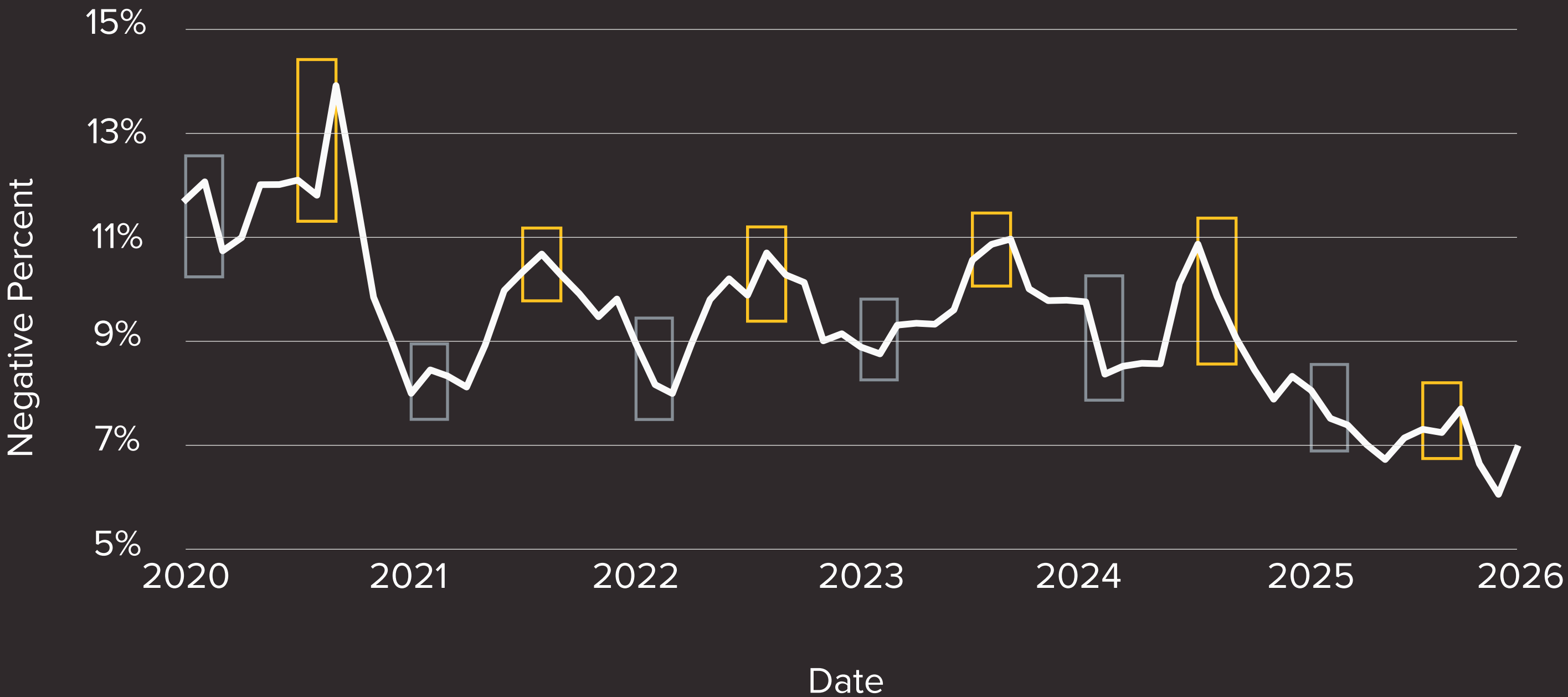
2025 Q4 INDUSTRY BENCHMARKS

AUTOMOTIVE INDUSTRY		WIDEWAIL CUSTOMERS
13 Reviews	Monthly Review Volume	39 Reviews
4.65 Stars	Average Google Rating	4.75 Stars
88%	Response Rate	100%
9%	Percent Negative	6%

OEM REPUTATION RANKINGS,
VOICE OF THE CUSTOMER 2025 Q4

OEM	HEALTH SCORE
1. Lexus	96/100
2. Toyota	94/100
3. Kia	91/100
4. Subaru	91/100
5. Nissan	91/100
6. Hyundai	90/100
7. Mercedes-Benz	89/100
8. Honda	89/100
9. BMW	88/100
10. Audi	87/100

5-YEAR NEGATIVITY TREND



INDUSTRY TRENDS

REVIEW VOLUME GROWS 25% YOY

In 2025, U.S. dealerships generated 5.5 million reviews, a 25% increase over the previous year. This volume now acts as a real-time heart rate monitor for the business.

SALES AND SERVICE COMMUNICATION NEGATIVITY MEET

Historically, communication complaints were concentrated in the service department. In 2025, that gap closed, both departments finishing with communication mentioned in 48% of negative reviews.

STAFFING STABILITY IS DRIVING A WEDGE BETWEEN SALES AND SERVICE CUSTOMER SENTIMENT

Staff execution is the most influential factor in customer perception. Fixed Ops retention efforts are stabilizing service sentiment, while accelerating turnover at all levels of sales is destabilizing the front-end customer experience.

PRICE NEGATIVITY IN SALES HAS REMAINED FLAT FOR 3 YEARS, POSITIVITY INCREASED

Considering the average price of a new vehicle and the market instability caused by tariffs, dealers and OEMs have done a good job of maintaining stability in customer pricing perception. Over the past three years, sales dept. price negativity has remained essentially flat, around 20%.

FIXED OPS TAKEAWAYS

- Communication friction remains the number one issue in service reviews.
- Shorter wait times in 2026 are a customer expectation, not a plus.
- Seasonal negativity spike makes Q3 the service bay stress test.
- Service retention levels anchor the customer experience in comparison to sales.

VARIABLE OPS TAKEAWAYS:

- Staff is the top driver of sales sentiment, and it's under pressure.
- Google reviews alone are not enough to maintain visibility in 2025. AI search growing in importance.
- Sales has caught up to Service in terms of communication negativity (almost 50%).
- The Sales narrative has shifted, and the lack of supply story is over. Price needs to match value in 2025.

WHAT IS IN THIS REPORT?

Each quarter, the Widewail team analyzes millions of reviews using AI technologies to categorize and log what is being said into 25 fundamental topics, whether or not the specific keyword is actually said. Widewail’s technology can determine which tags to apply to each review based on contextual details. In 2025, we researched 5.5M Google reviews from ~18,000 U.S.-based franchise car dealerships.

“

“The auto industry is no longer judged by isolated moments; it’s measured continuously. In 2025 alone, U.S. dealerships generated 5.5 million reviews, nearly half a million every month. Every review now shapes customer perception in real time. Dealers who succeed won’t just chase reviews, they’ll understand them, learn from them, and consistently deliver clarity and reliability.”

— **CUYLER OWENS** | CEO, WIDEWAIL

Q4 REPUTATION BENCHMARKS WIDEWAIL CLIENTS VS. THE INDUSTRY

2025 Q4 INDUSTRY AVERAGES		2025 Q4 PERFORMANCE FOR WIDEWAIL AUTO CLIENTS	
13	MONTHLY REVIEW VOLUME	39	
4.65	AVERAGE GOOGLE RATING	4.75	
88%	RESPONSE RATE	100%	
9%	NEGATIVE PERCENTAGE	6%	

WHERE TOP-RATED DEALERSHIPS NEED TO FOCUS IN 2026

Top dealers have these 5 topics mentioned **often** in positive reviews:

Top dealers have these 5 topics mentioned **infrequently** in negative reviews:

POSITIVE REVIEWS: Q4 2025				NEGATIVE REVIEWS: Q4 2025			
RANK	TOPIC	MENTION %, GROWTH VS. Q3		RANK	TOPIC	MENTION %, GROWTH VS. Q3	
1	STAFF	77.4%	▲ +0.6%	1	COMMUNICATION	43.5%	▼ -1.7%
2	HELPFULNESS	24.2%	▲ +0.1%	2	STAFF	37.2%	▼ -2.9%
3	FRIENDLINESS	18.3%	▼ -2.1%	3	MAINTENANCE/REPAIR	22%	▼ -1.9%
4	KNOWLEDGEABLE	16.2%	▼ -1.9%	4	MANAGEMENT	21%	▼ -2%
5	PROFESSIONALISM	12.9%	▼ -0.9%	5	PRICE/COST	19.9%	▲ +2.1%

WHAT'S DRIVING SALES SENTIMENT?

Positive Sales reviews mention:

RANKING	TOPIC	MENTION %	CHANGE FROM Q3
1	Staff	82.6%	▲ +0.3%
2	Helpfulness	26.4%	▼ -0.8%
3	Knowledgeable	20.5%	▼ -2.8%
4	Friendliness	17.6%	▼ -2.2%
5	Professionalism	15.1%	▼ -1.6%

Negative Sales reviews mention:

RANKING	TOPIC	MENTION %	CHANGE FROM Q3
1	Communication	48.4%	▼ -1.4%
2	Staff	43.8%	▼ -2.8%
3	Management	29.3%	▼ -1.6%
4	Price/Cost	20.2%	▼ -0.4%
5	Financing Department	16%	▲ +0.5%

WHAT'S FUELING SERVICE SENTIMENT?

Positive Service reviews mention:

RANKING	TOPIC	MENTION %	CHANGE FROM Q3
1	Staff	66%	▼ -0.8%
2	Friendliness	18.6%	▼ -2%
3	Helpfulness	17.9%	▼ -1.3%
4	Communication	12.9%	▼ -1.6%
5	Knowledgeable	12.4%	▼ -2.8%

Negative Service reviews mention:

RANKING	TOPIC	MENTION %	CHANGE FROM Q3
1	Communication	48.7%	▼ -1.7%
2	Staff	40.1%	▼ -2.7%
3	Car Maintenance /Repair	22.5%	▼ -3.3%
4	Management	20.5%	▼ -2.4%
5	Wait Times	19.8%	▼ -2.5%

Dive deeper into topic-sentiment analysis with individual reputation and CX scorecard reports. Are you a franchise dealer? We have one ready for you.

Get Your Free Report

widewail.com/free-automotive-reputation-scorecard-report

UNPRECEDENTED REVIEW VOLUME GROWTH

VOC DATA IS A CONTINUOUS SIGNAL

Something fundamental has changed in automotive reputation and the way we capture and interpret customer sentiment.

Review volume isn't just growing. It's reshaping how customer perceptions form. Reputation today is no longer built in bursts around big moments; it's built continuously, through volume, recency, and consistency. It's the heart rate monitor of the business.

In 2025 alone, U.S. dealerships generated 5.5 million reviews (nearly 500,000 new reviews every month). At that scale, the Voice of the Customer never turns off. Visibility is always updating. Perception is always being recalculated.

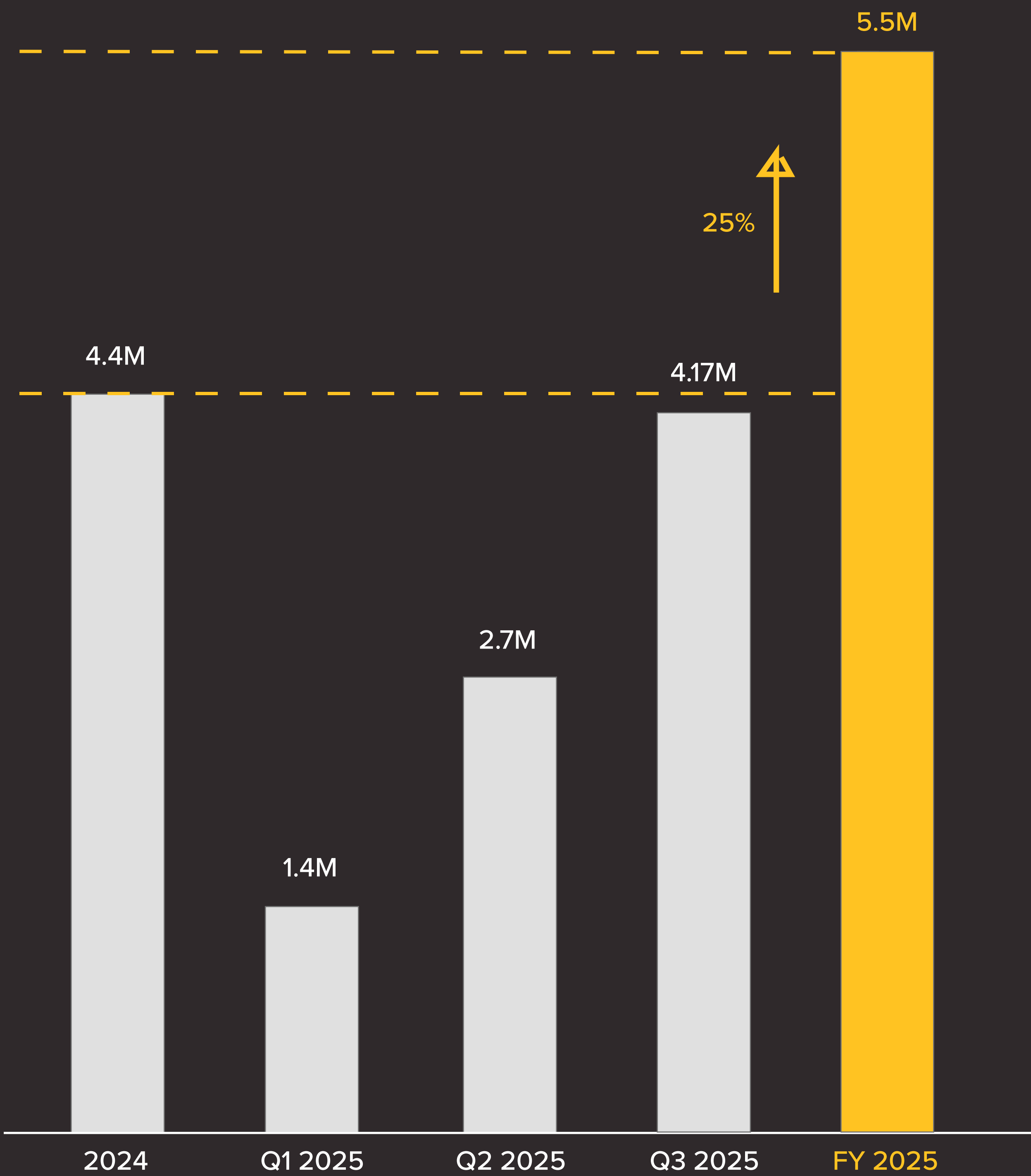
And the growth wasn't a one-off spike.

Quarter after quarter, review volume held steady at historically high levels:

- ▶ Q1: ~1.4M reviews
- ▶ Q2: ~1.3M
- ▶ Q3: ~1.5M
- ▶ Q4: ~1.4M

By year's end, total volume landed at 5.5 million reviews, up from 4.4 million in 2024, a 25% increase.

CHART 1 | COUNT OF GOOGLE REVIEWS 18,000 FRANCHISE DEALERSHIPS | QUARTERLY DATA CUMULATIVE



What's more important than the raw total is where that growth is coming from.

At the dealership level, review generation is becoming more consistent and more normalized. Average monthly reviews per rooftop rose from 11.3 at the start of the year to 13.0 by Q4. More rooftops are operating above the historical baseline, not just the top performers.

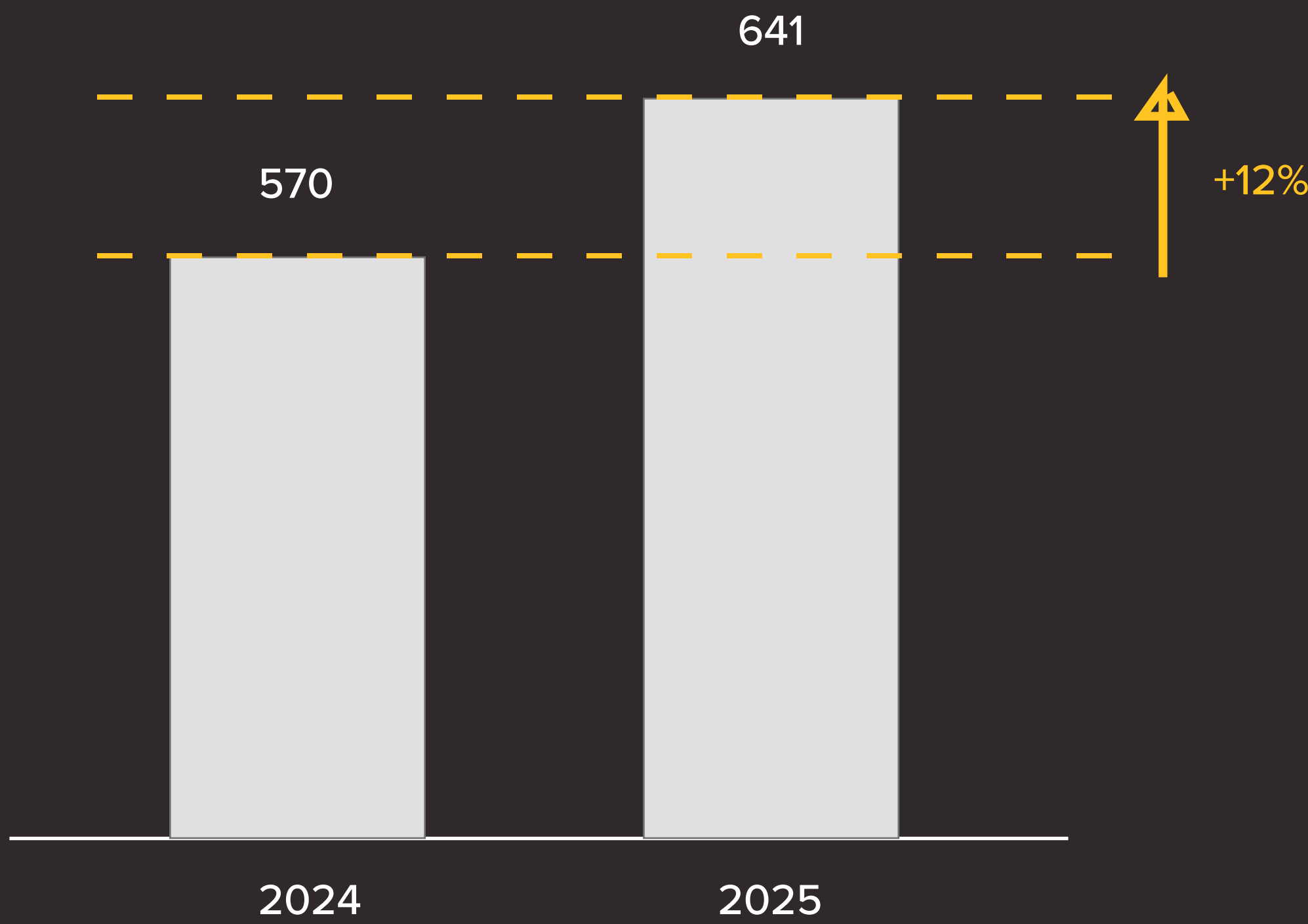
The takeaway is simple: Customer feedback isn't occasional. It's part of the everyday experience.

And in an environment where perception updates daily, the dealers who win won't be the ones who chase reviews — they'll be the ones who understand what that review content is actually telling them, and what is typical among other dealers. That is what this report is about. A compass for where customer experience is at and where it is going, as reported first-hand.

ULTRA HIGH-VOLUME DEALERS GROW 12% IN 2025

High-volume review generation is becoming more common. From 2024 to 2025, the number of dealerships averaging 100 or more reviews per month grew by 12%, increasing from 570 to 641 rooftops. These dealers rely on repeatable processes that collect feedback throughout the customer journey, resulting in maintained visibility.

CHART 2 | DEALERS GENERATING 100+ GOOGLE REVIEWS PER MONTH



RANK HIGHER IN AI SEARCH RESULTS WITH REVIEW VOLUME

Review volume now directly influences how dealerships appear in AI-driven search tools like Google's Gemini and ChatGPT.

These systems prioritize recent and consistent customer feedback to assess credibility and relevance. Dealers with steady review activity are more likely to be accurately represented in AI-generated summaries. Those with limited or outdated reviews risk reduced visibility even if their experience hasn't changed.

The shift is structural. Google no longer owns discovery alone. While Gemini relies heavily on Google Reviews, ChatGPT draws from third-party sources such as Yelp and DealerRater.

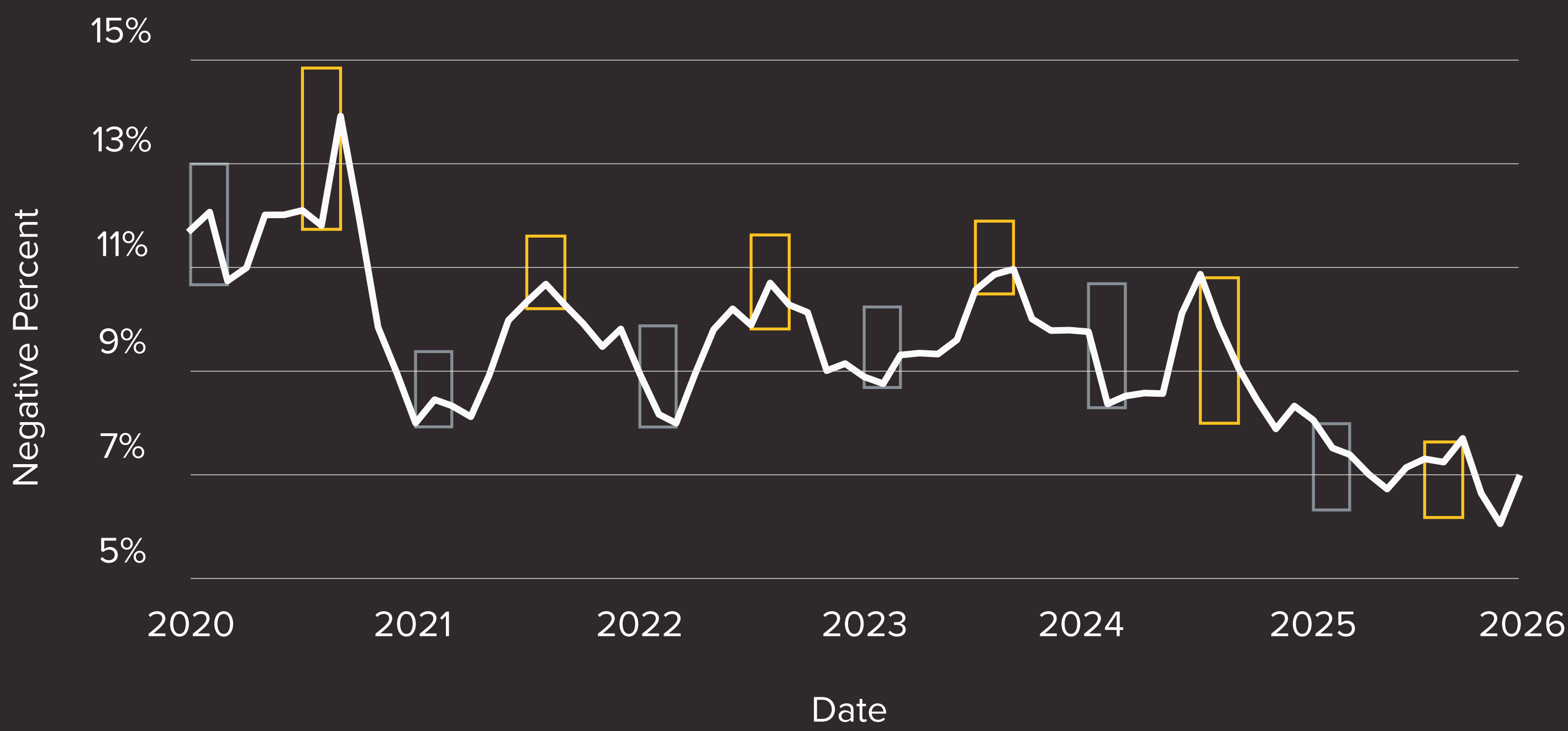
The takeaway is simple:
To rank well in AI search, dealers need consistent, multi-platform review volume, not just strong Google ratings.

SEASONAL NEGATIVITY FOLLOWS A FAMILIAR PATTERN

Even as review volume rises, negative sentiment continues to follow predictable seasonal shifts.

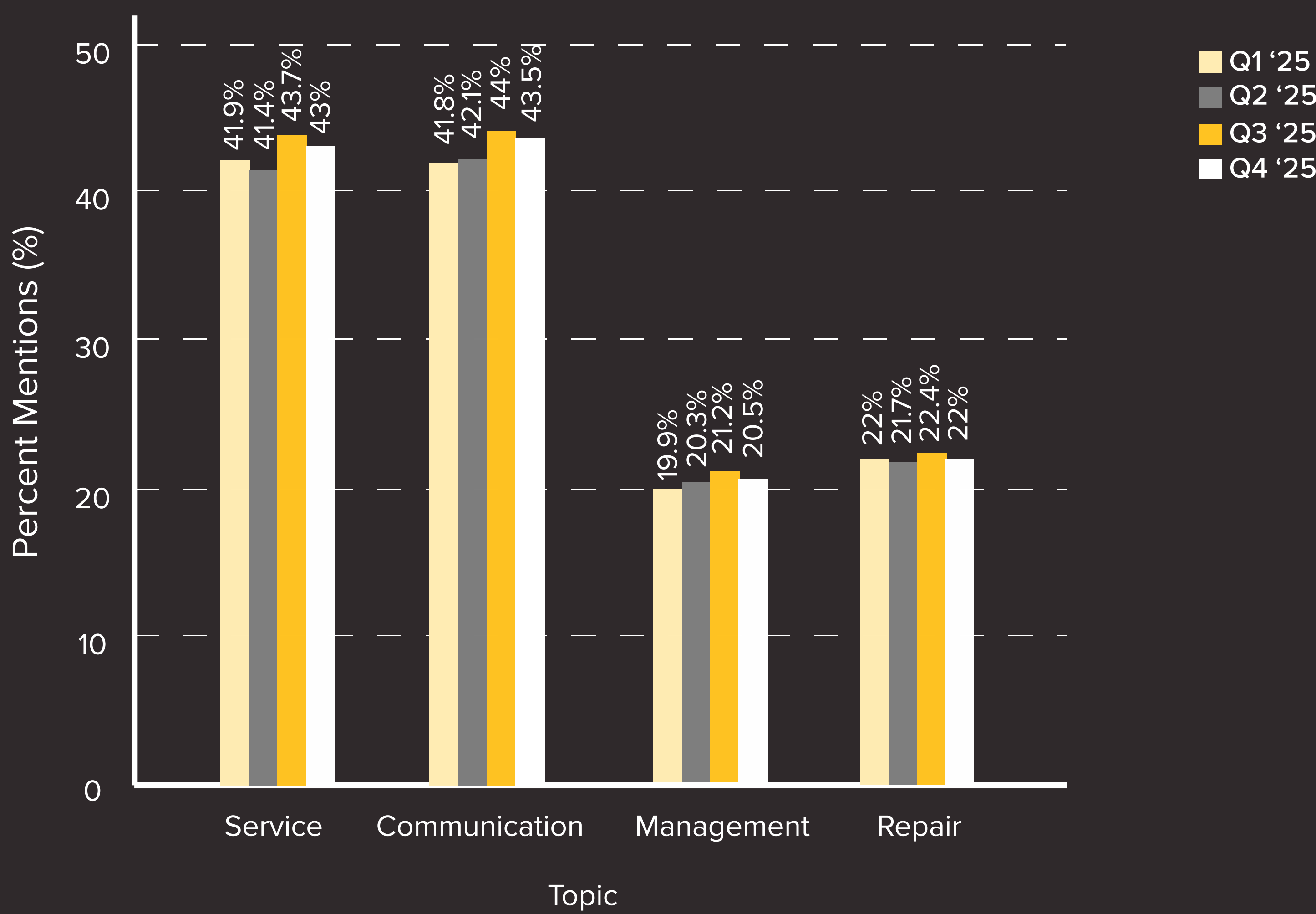
The share of 1–3 star reviews peaks in the summer, most notably in Q3, with smaller increases during the holiday period. Higher travel volume, faster operational pace, and increased staff time off consistently correspond with an overall rise in negativity.

CHART 3 | SEASONAL 5-YEAR NEGATIVITY TREND



A quarterly look at consequential service-related topics in negative reviews highlights the pattern:

CHART 4 | NEGATIVE TOPIC MENTIONS THROUGHOUT 2025 BY QUARTER



These shifts are modest individually but consistent year over year. As volume increases, service operations have less margin for error. Small breakdowns surface more often and more publicly during peak months.

WHAT DEALERS SHOULD TAKE FROM THIS:

Q3 doesn't create new problems. It exposes the ones already there.

Communication breaks first. As service lanes fill, missed updates, unclear timelines, and vague expectations show up in reviews faster than the work itself. Customers notice when they feel left in the dark.

The opportunity is in timing. Processes that feel good enough in Q1 often struggle under Q3 volume. Dealers that plan coverage, standardize updates, and set clear expectations before peak season reduce the risk of visible sentiment drops.

And in an environment where perception updates daily, the dealers who win won't be the ones who chase reviews — they'll be the ones who understand what that review content is actually telling them, and what is typical among other dealers. That is what this report is about. A compass for where customer experience is at and where it is going, as reported first-hand.

SALES AND SERVICE COMMUNICATION NEGATIVITY MEET DUE TO ACCELERATED SALES NEGATIVITY GROWTH

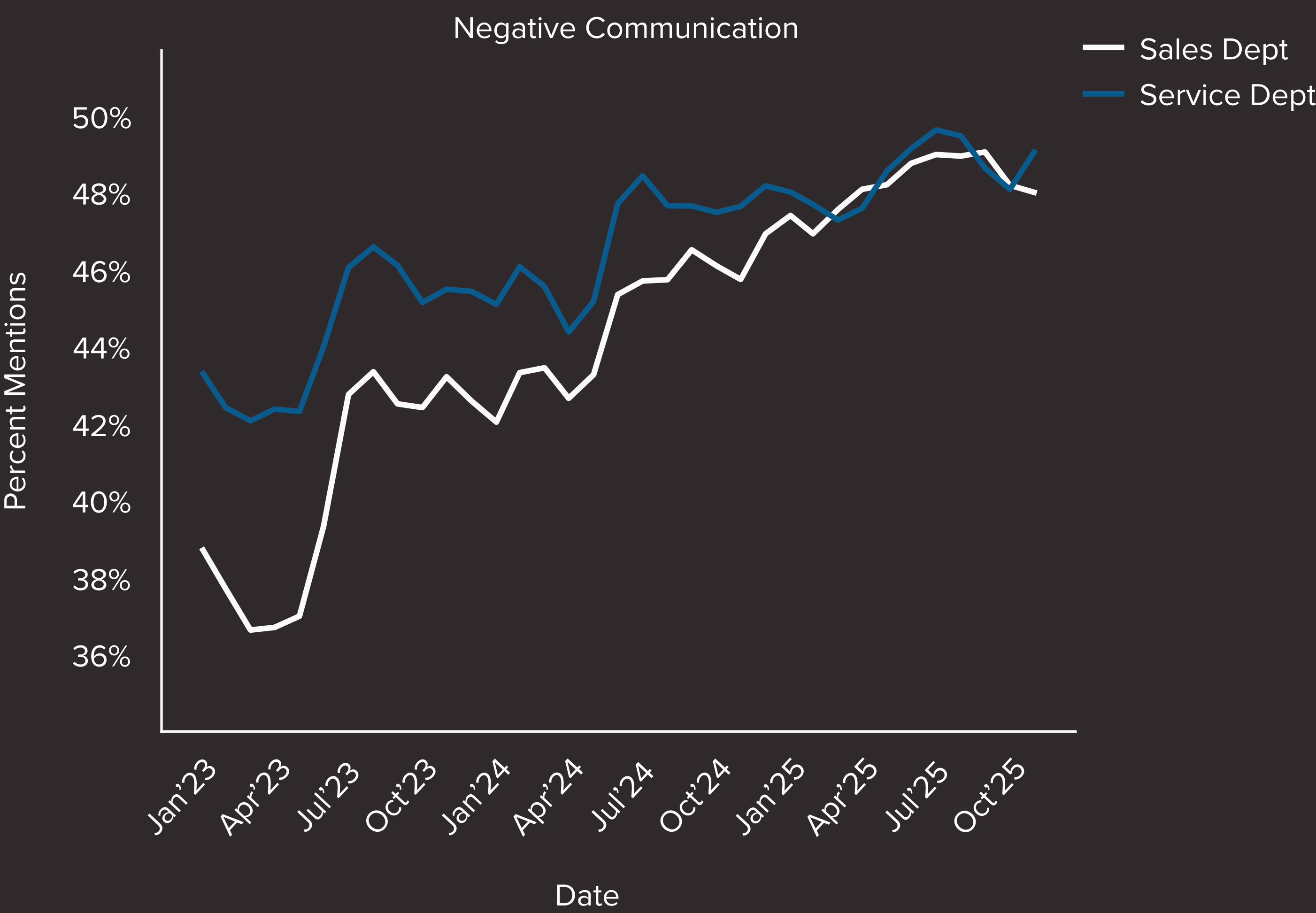
SALES COMMUNICATION NEGATIVITY GROWS FASTER TO MATCH SERVICE COMMUNICATION FRUSTRATION

Historically, communication issues skewed toward service. That gap has closed. In Q4:

- ▶ Service communication negativity: 48.7%
- ▶ Sales communication negativity: 48.4%

Sales is no longer insulated by purchase excitement. It's now under the same scrutiny as the service department.

CHART 5 | HISTORIC NEGATIVE COMMUNICATION MENTIONS, SALES VS. SERVICE



WHY SALES COMMUNICATION NEGATIVITY IS SURGING

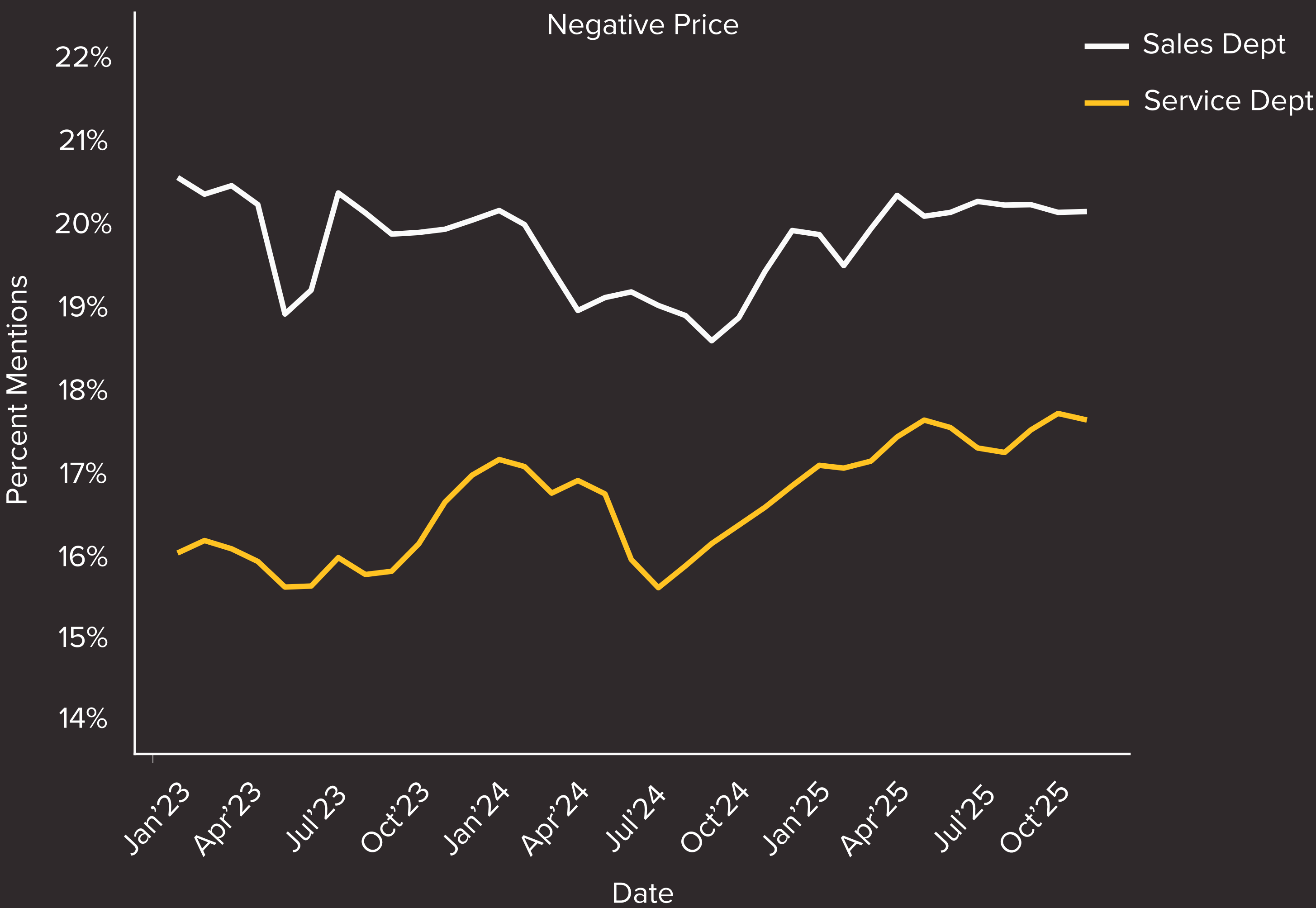
Price Sentiment has Stabilized. Expectations Have Not.

By the second half of 2025, record-high pricing became an accepted baseline. Average new-vehicle transaction prices surpassed \$50,000, yet retail sales remained steady. Sales-department price-related negativity flattened, holding near 19% for most of the year.

Communication followed the opposite trajectory. Sales communication negativity climbed steadily, reaching 48% by late 2025, with no sustained recovery since late 2024.

With average monthly vehicle payments approaching \$749 (WSJ), tolerance for silence has disappeared. When prices are high, expectations for clarity rise. The most common complaint during peak negativity was simple: nobody followed up.

CHART 6 | HISTORIC NEGATIVE PRICE MENTIONS, SALES VS. SERVICE



WHAT CUSTOMERS MEAN BY “POOR COMMUNICATION”

Communication negativity rarely appears in isolation. It clusters around a small set of repeat themes:

Follow-Through: Customers cite unanswered calls, delayed updates, and unclear next steps. The frustration is less about outcomes and more about silence.

“The sales manager didn’t call me back with the reduced price quote he promised; I had to call them back over a week later.”

Price and Cost: Review samples show price complaints framed less around affordability and more around clarity. Mentions tied to bait-and-switch tactics, unexpected fees, or shifting numbers consistently surface under communication-related reviews.

“I drove 2 hours to look at a vehicle and was negotiating the price. I told them I was 30 mins away, and when I arrived, the owner said he sold the car. Don’t trust these guys, very unethical way of doing business.”

Knowledge Gaps: Customers flag inconsistent answers, conflicting information, or the staff’s inability to clearly explain processes. These reviews frequently overlap with both communication and staff-related sentiment.

“I went back and forth between two different salespeople who didn’t coordinate with each other, and it felt like a lot of duplicative communication.”

Across all three, the issue is not the message itself but how confidently and consistently it is delivered.

STAFFING STABILITY IS DRIVING A WEDGE BETWEEN SALES AND SERVICE SENTIMENT

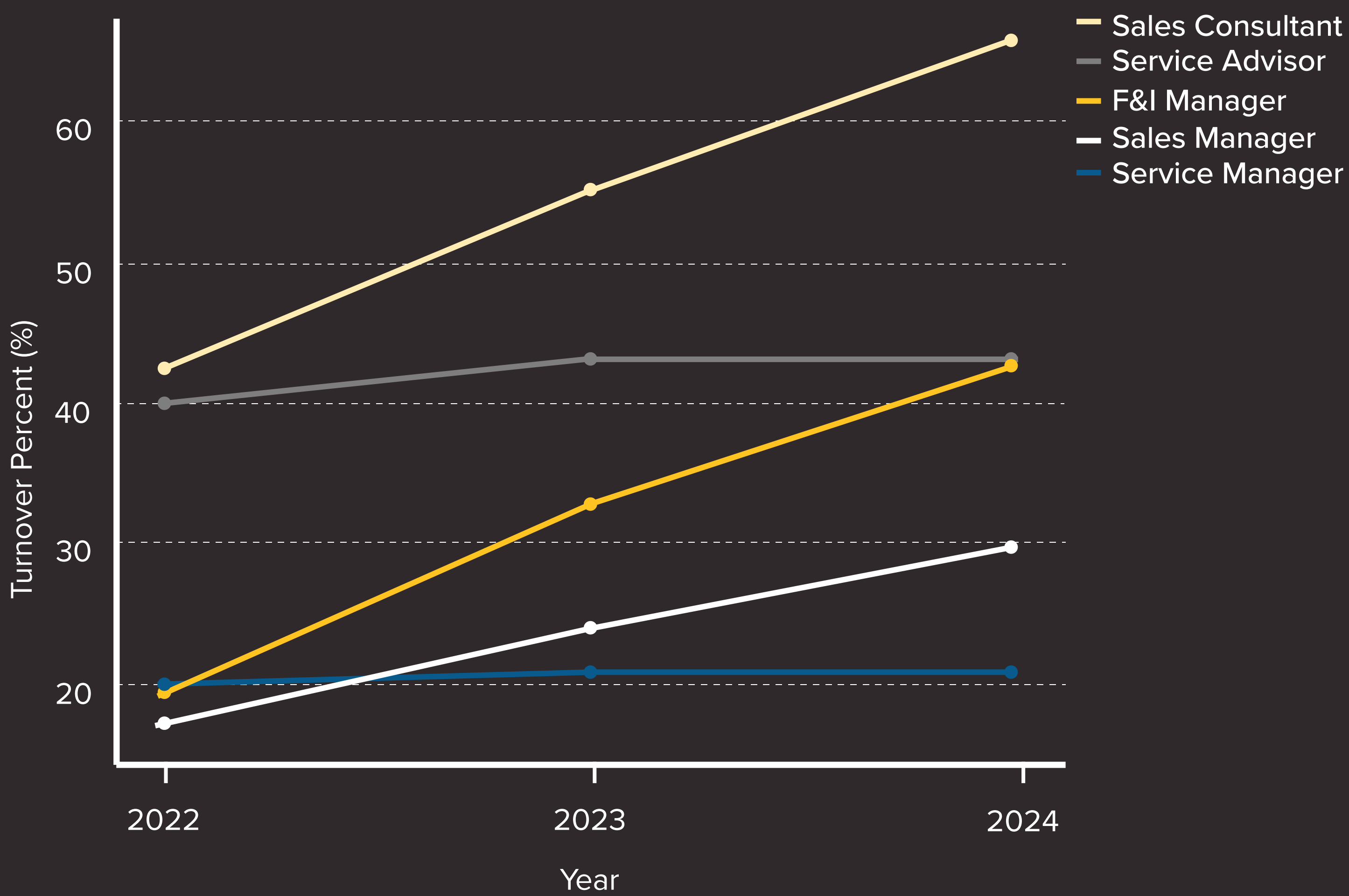
Staff execution remains the single most influential factor in customer perception. While important in both departments, staff consistently drive more positive outcomes in sales (82% of positive reviews) compared to service (65% of positive reviews).

High turnover is a notable challenge that has intensified in recent years. After studying over 15M Google reviews from 2023 to 2025, we can begin to see the impact of staffing challenges on customer experience. The problem emerges in a unique way: sentiment divergence between sales and service departments.

Data from **NADA Workforce Study, 2025, 2024, 2023:*

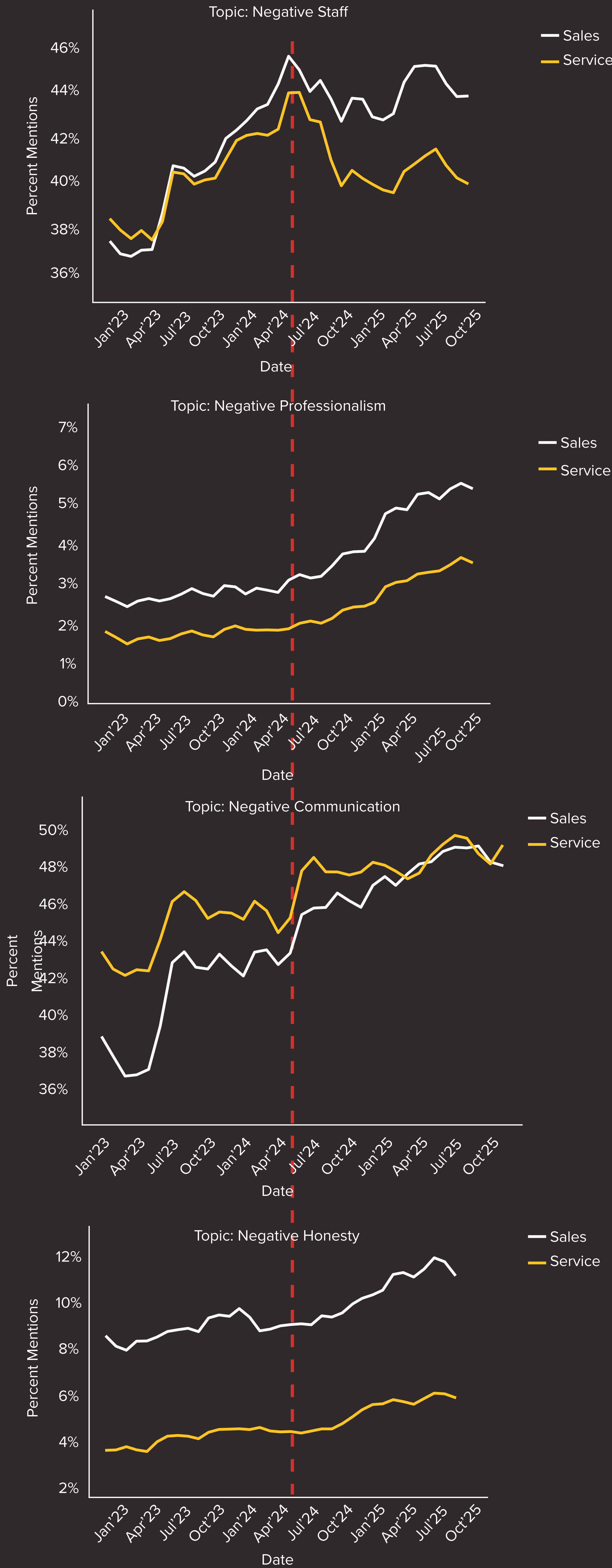
POSITION	2024 ANNUALIZED TURNOVER	2023 ANNUALIZED TURNOVER	2022 ANNUALIZED TURNOVER
Sales Consultant	66%	55%	42%
Service Advisor	43%	43%	40%
F&I Manager	43%	33%	19%
Sales Manager	30%	24%	17%
Service Manager	21%	21%	20%

CHART 7 | ANNUALIZED TURNOVER BY POSITION (2022-2024)



Within Widewail’s customer experience data, we observe a divergence between the departments that begins in the summer of 2024:

CHART 8 | HISTORIC TOPIC MENTIONS, SALES VS. SERVICE



WHAT WE ARE KEEPING AN EYE ON IN 2026:

It's well understood within the industry that staff retention is a growing problem. Recent data from NADA and Widewail suggest that Fixed Ops retention efforts appear to be working, with the labor market fairly stable. As a result, customer frustration in service has grown more slowly than sales over the last three years.

Sales Departments, on the other hand, face a multi-layered problem. High turnover rates are impacting not only sales consultants but also department management, leading to two critical issues:

- ▶ *The sales process is more sensitive to staffing quality because customers spend more face-to-face time with consultants and rely heavily on their specific product expertise.*
- ▶ *Annualized turnover is accelerating across every level of the sales team, from frontline consultants to senior managers.*

PRICE DOES NOT EQUAL PERCEPTION

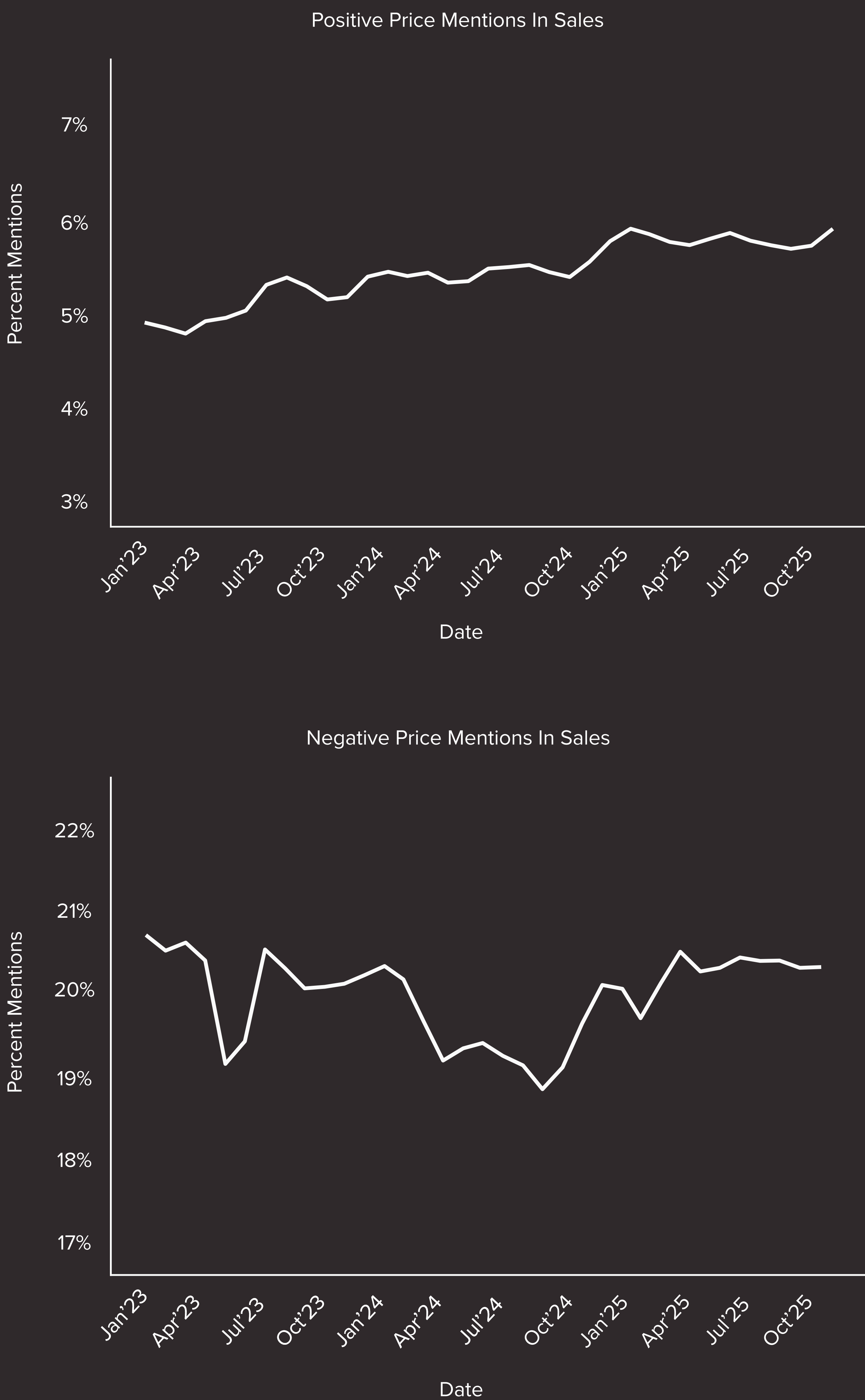
PRICE NEGATIVITY IN SALES HAS REMAINED FLAT FOR 3 YEARS, POSITIVITY INCREASED

Considering the average price of a new vehicle and the market instability caused by tariffs, dealers and OEMs have done a good job of maintaining stability in customer pricing perception. When you zoom out to the last three years, pricing negativity is essentially flat, around 20%.

Average cost of a new vehicle over the last 3 years:

- ▶ 2023: 48,451
- ▶ 2024: 49,958
- ▶ 2025: 50,362

CHART 9 | HISTORIC PRICE MENTIONS IN SALES



MIDWEST: MOST PRICE NEGATIVITY DESPITE EXPERIENCING THE LOWEST PRICES NATIONALLY

Price sensitivity varies by region, not just by cost. To understand this, we compared regional performance to the industry benchmark and the **Regional Price Parity (RPP) Index**, a Census measure of how expensive each region is relative to the national average (100 = average).

REGION	REGIONAL PRICE PARITY	POSITIVE PRICE MENTIONS (VS. BENCHMARK)	NEGATIVE PRICE MENTIONS (VS. BENCHMARK)
West	102.0 (Highest Cost)	+10.7%	-0.3%
Northeast	101.4	+7.3%	+1.1%
South	95.2	-7.7%	-1.9%
Midwest	92.9 (Lowest Cost)	+1.9%	+4.2%

The data shows that perception doesn't always match reality.

- ▶ **West:** The most expensive region (2% above average) scores above the benchmark for positive price sentiment. Shoppers here expect higher costs and seem satisfied when the experience matches the price.
- ▶ **Midwest:** The most affordable region (7% below average) registers the highest negative sentiment (+4.2%).

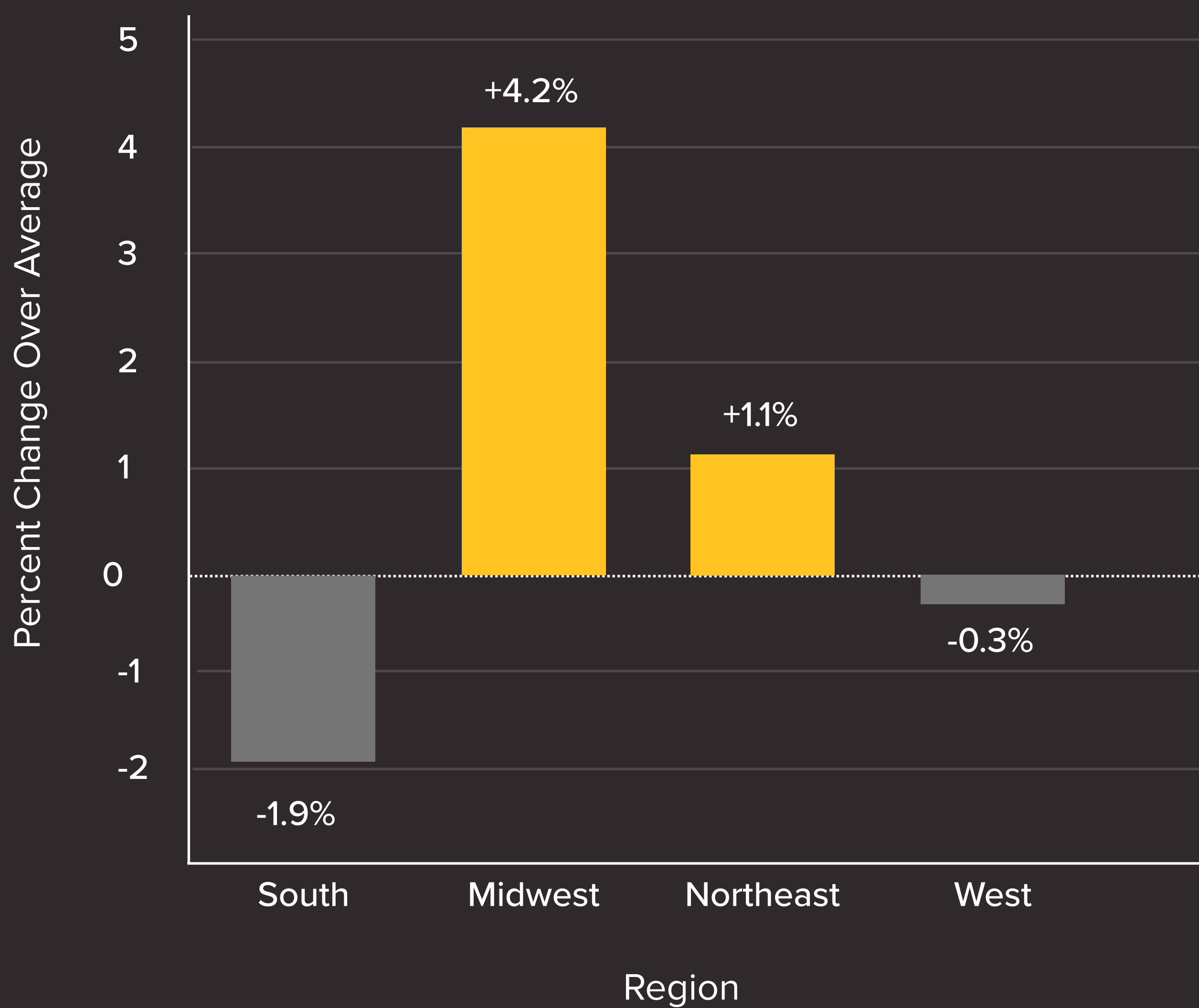
For someone earning \$50,000 annually, the difference in real purchasing power between the West and Midwest is \$4,550—a full year of car insurance or a dealership service plan. Yet, this gap doesn't predict how customers perceive price.

If price perception tracked objective cost alone, lower-cost regions would see fewer complaints, but that's not the case.

Even in luxury segments, 20–30% of reviews mention price negatively, regardless of the local cost of living. Price perception is driven by expectations and transparency, not the invoice.

Once price is removed as a factor, the story shifts to quality.

CHART 10 | REGIONAL PRICE NEGATIVITY VS. BENCHMARK



REGIONAL PROFILES

**All taken from Q4 Review Data*

Midwest: Quality Outpaces Price

Price sensitivity is highest in the country (+4% above benchmark), despite the Midwest being the most affordable region overall.

This reflects high expectations, not poor value perception.

Strong operational performance offsets cost concerns:

- ▶ *Professionalism complaints: -21%*
- ▶ *Helpfulness complaints: -14%*
- ▶ *Positive sentiment for avoiding vehicle damage: +19%*

Midwest consumers define value as efficient, error-free service.

Technical reliability is assumed, making any misalignment between price and performance especially noticeable.

West: High-Cost Friction Points

Consumers are comfortable with higher prices (+11% positive price sentiment) when the experience feels premium.

The region leads in engagement and perceived quality:

- ▶ *Communication: +14%*
- ▶ *Friendliness: +6%*
- ▶ *Parts: +32%*
- ▶ *Loaner Cars: +19%*
- ▶ *Warranty: +18%*

However, operational friction undermines the experience:

- ▶ *Helpfulness complaints: +17%*
- ▶ *Knowledge complaints: +12%*
- ▶ *Valet issues: +36%*

The takeaway: strong interpersonal experiences support higher pricing, but execution gaps are becoming a growing risk.

Northeast: Expertise Over Etiquette

The Northeast prioritizes competence over friendliness.

Strong performance in:

- ▶ *Staff knowledge: +11%*
- ▶ *Facility cleanliness: +11%*
- ▶ *Financing complaints: -17%*

However, the region leads the country in:

- ▶ *Professionalism complaints: +12%*
- ▶ *Valet delays: +70%*

These issues are tolerated as long as the work is done correctly.

For Northeast customers, technical expertise and accuracy outweigh polish.

South: Trust and Transparency

Price sensitivity is high, with price sentiment 8% below the benchmark.

Trust is the defining driver of satisfaction:

- ▶ *Avoiding bait-and-switch complaints: +51%*
- ▶ *Knowledge complaints: -6%*

Operational friction exists in:

- ▶ *Trade-ins: +9%*
- ▶ *Financing: +7%*

Despite this, customers value honesty and consistency over price alone.

In the South, credibility and fairness create loyalty, even when costs rise.

Key takeaway for Dealers: Price is rarely the only cause of dissatisfaction; it's the lens through which consumers view experience gaps. When price pressure is removed, the defining characteristics of the experience, be it the Midwest's precision or the West's communication, become the primary drivers of regional loyalty.

WHAT FIXED OPS TEAMS NEED TO KNOW HEADED INTO 2026

1. COMMUNICATION MAKES OR BREAKS

Communication Friction Remains #1 Issue

Negative communication mentions grew steadily across 2025, peaking at 49% in Q3 and remaining high in Q4 (48%).

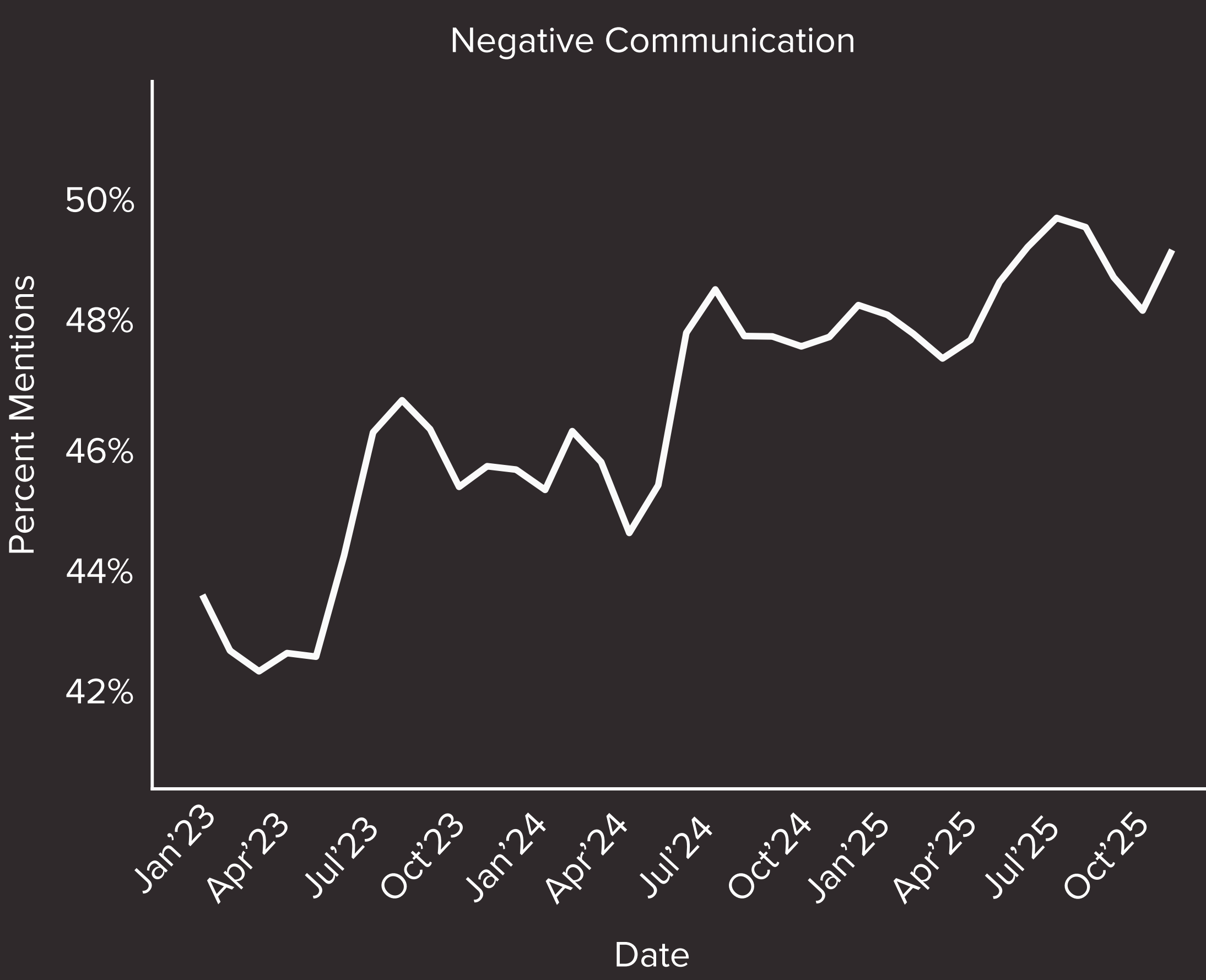
Customers repeatedly cite unclear timelines, missed callbacks, and limited updates as the main sources of frustration in their reviews.

Communication failures create distrust faster than any operational misstep. Over the course of 2025, as communication negativity has continued to rise, trust-related complaints have as well:

- ▶ *Damage complaints: +10%*
- ▶ *Honesty/Transparency complaints: +19%*
- ▶ *Repair issues account for 22.5% of negative reviews in Q4*

Standardize updates for every repair. Use texts, portal notifications, or video updates to keep customers informed at every step. Transparency builds trust and prevents frustration before it starts.

CHART 11 | NEGATIVE COMMUNICATION IN SERVICE



2. SHORTER WAIT TIMES ARE A NECESSITY

Speed is an Expectation

In 2025, the industry hit a performance ceiling. While negative mentions of wait times dropped 6%, positive sentiment also fell by over 9%.

CHART 12 | NEGATIVE WAIT TIMES IN SERVICE

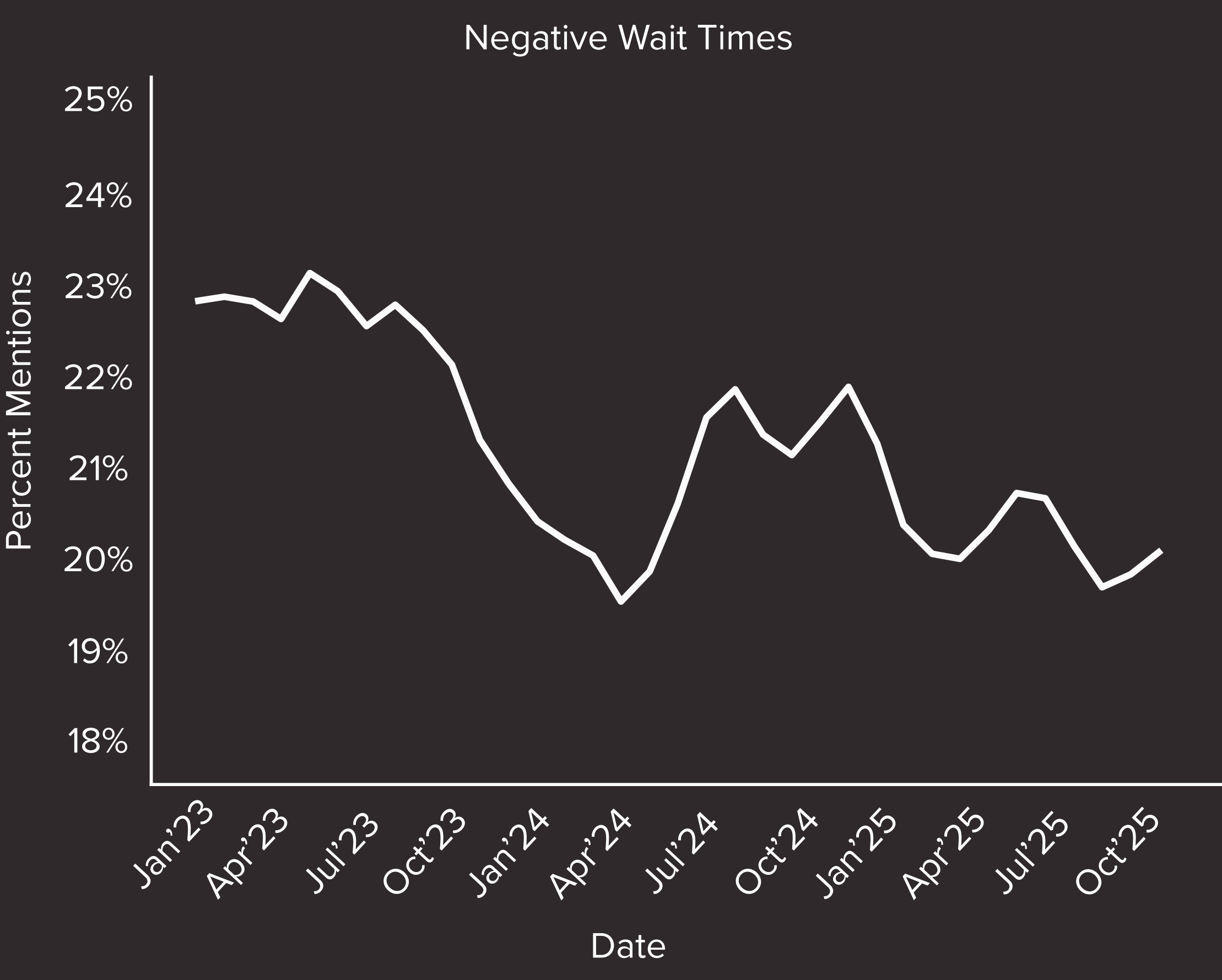
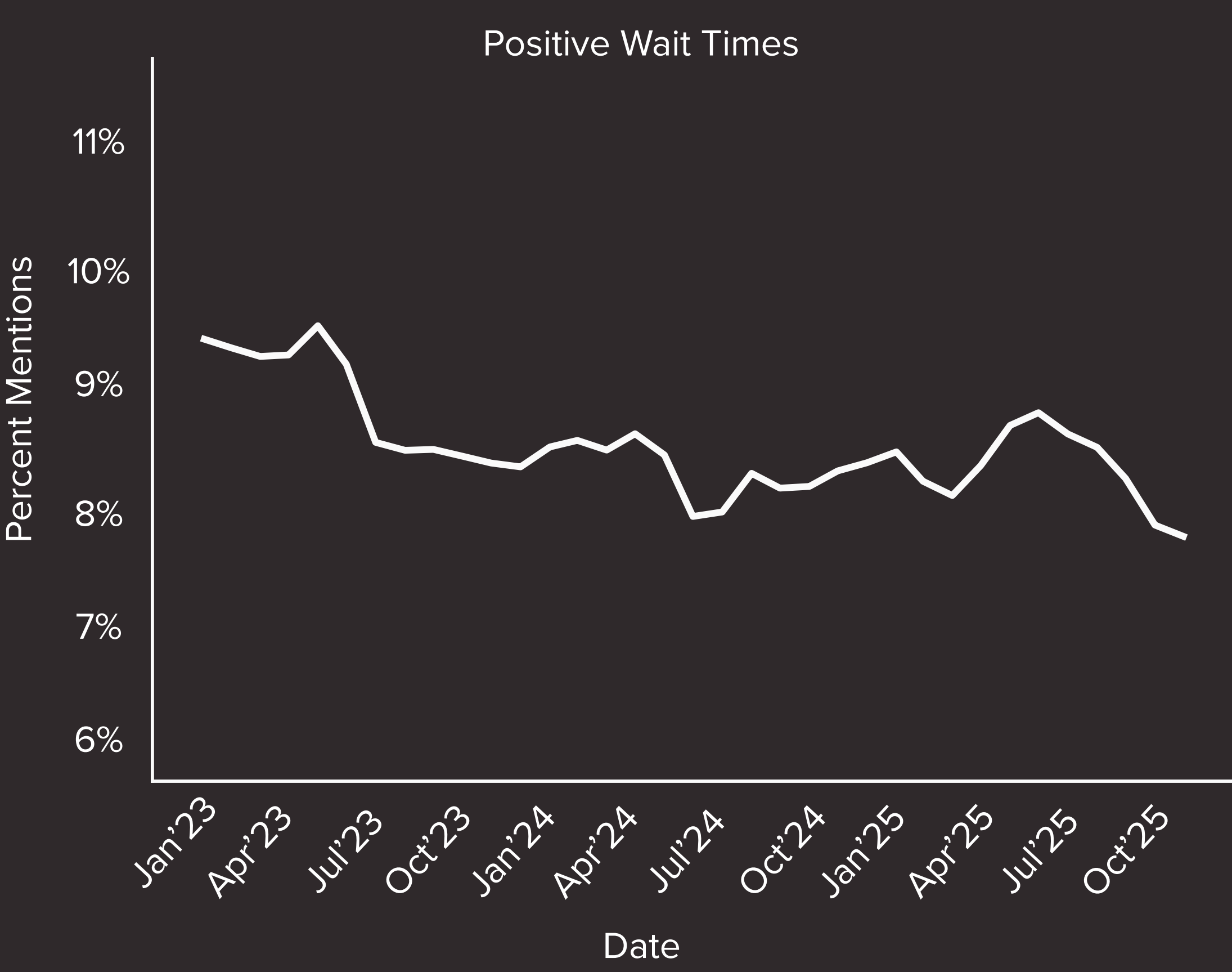


CHART 13 | POSITIVE WAIT TIMES IN SERVICE



The 2026 Reality: Speed is no longer a differentiator; it's a baseline expectation. When a shop delivers a car on time, the modern customer doesn't feel delighted; they simply feel they got what they paid for.

To win in 2026, Fixed Ops teams must pivot from managing the clock to managing the experience.

2. SHORTER WAIT TIMES ARE A NECESSITY (CONTINUED)

Key Areas of Improvement:
*Based on 2025 Review Samples Mentioning Wait Time

1. Appointment Gaps: Many reviewers mention having to wait (sometimes hours) for a scheduled appointment. Customers view an appointment as a start time, while shops often treat it as a check-in time. Being clear upfront with customers about timelines will save confusion and frustration.

For a Dealership in GA: “What is the use of an appointment? I arrived at 10:20 for an 11:00 oil change... 2.5 hours later still waiting.”

2. Diagnostic Delays: Customers are increasingly literate in vehicle operations. They know a multipoint inspection takes minutes, not hours. Using diagnostic complexity to mask operational backlogs is a strategy that no longer works in 2026. Honesty is the only way to preserve trust.

For a Dealership in MD: “At 11:55 am, I sent a text asking for status. He replied they’re still working on a few tests... At almost 5 pm, we were told they never even looked at my car! You knew at noon you weren’t going to look at my car.”

3. Communication Issues: Many negative wait time reviews stem from customers having to call the shop for updates, rather than receiving proactive outreach. Prioritize consistent and timely communication with customers.

For a Dealership in TX: “I have been trying to contact your service department since Monday, and it is now Wednesday... I was told my information would be passed on and someone would contact me, but no one ever did.”

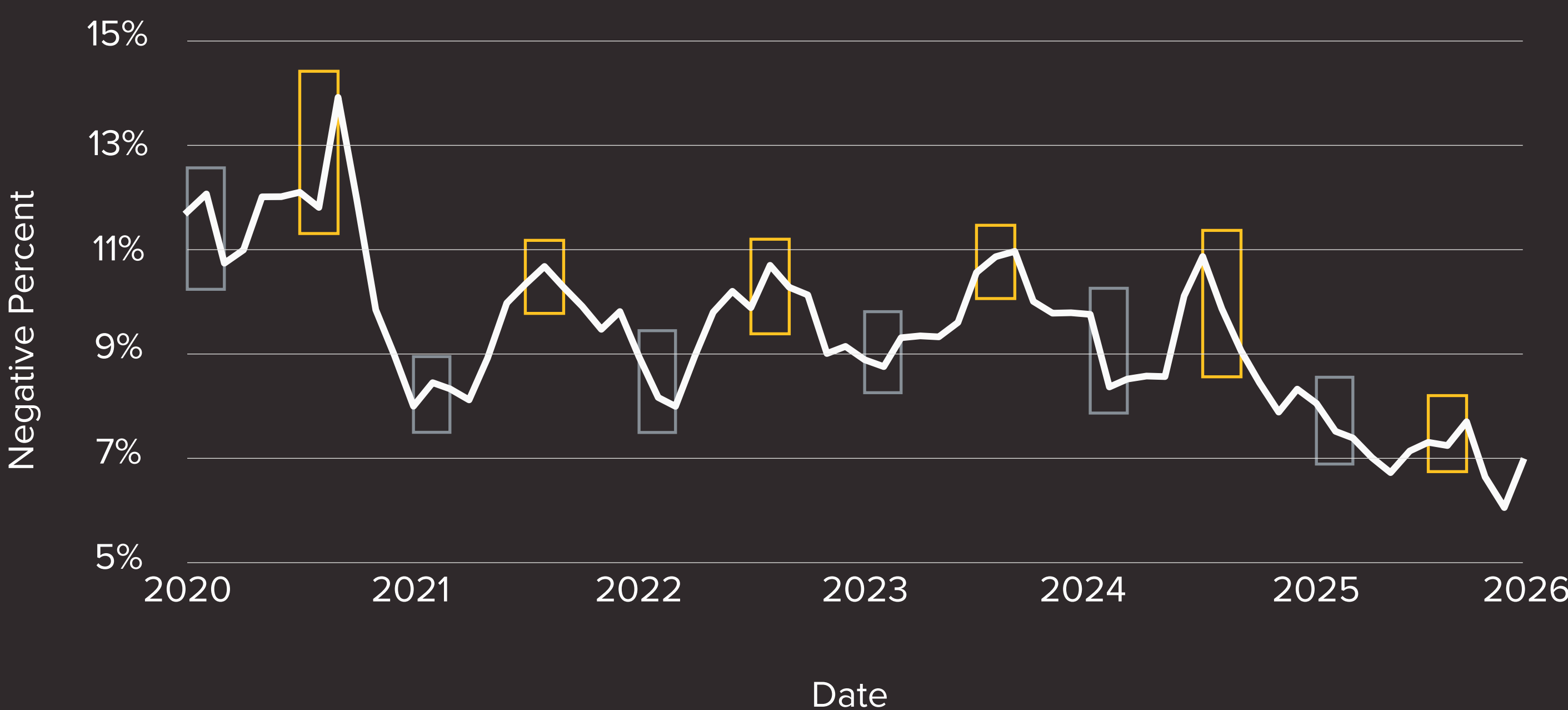
3. SEASONALITY IMPACTS SERVICE

Q3 is Your Service Bay Stress Test

Negative reviews spike every Q3. Predictably, travel increases and vehicles break down. And the reality is, we all like to take vacations when the weather is best.

What your customers are telling you: Design your experience to support Q3 demand. If you can handle Q3, the rest of the year will fall in line.

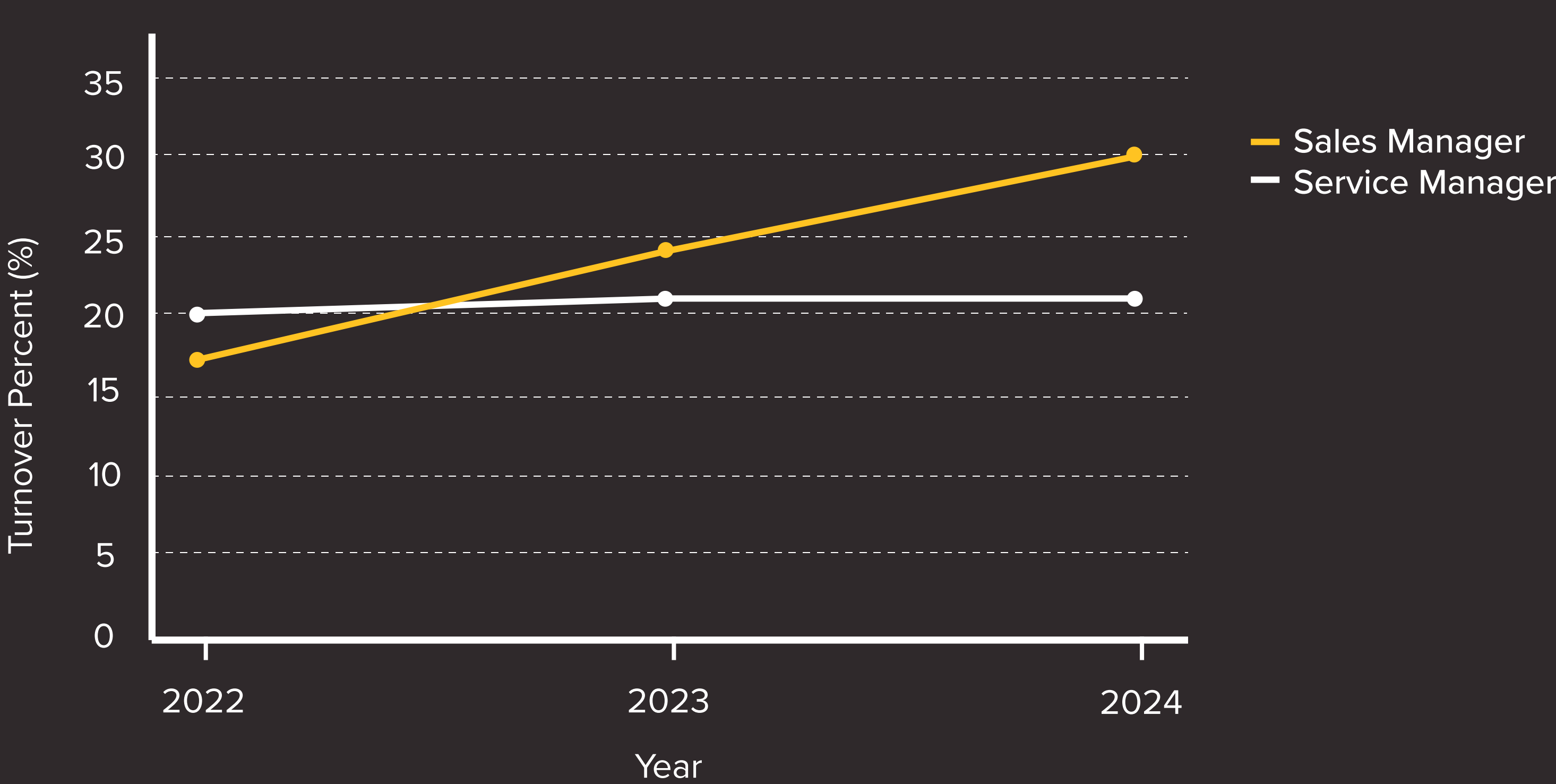
CHART 14 | 5-YEAR NEGATIVITY TREND



4. STAFF RETENTION ANCHORS THE SERVICE EXPERIENCE

While turnover has increased across the industry, the Service department has seen significantly less than sales. According to NADA Workforce Study, Service Manager turnover has held steady at 21% for three consecutive years, whereas across the Sales department, management churn has jumped to 30%.

CHART 15 | MANAGEMENT TURNOVER SALES VS. SERVICE



This relative stability in Fixed Ops leadership is why customer experience frustration in Service is growing more slowly than in Sales. While Sales is grappling with a multi-layered turnover crisis, Service departments are successfully holding the line.

Despite stability at the top, the front line still faces challenges. Service Advisors have a median tenure of 2.6 years. In a technical environment, this creates a specific type of friction where a lack of experience is often mistaken for a lack of integrity.

- ▶ In Q4, positive sentiment regarding Service Knowledge dropped 3%.
- ▶ Simultaneously, negative sentiment for Honesty increased by 5.46%.

4. STAFF RETENTION ANCHORS THE SERVICE EXPERIENCE (CONTINUED)

When staff lack deep technical expertise due to shorter tenures, customers don’t just see a new employee; they perceive a lack of transparency. In Fixed Ops, technical competence is the foundation of consumer trust.

CHART 16 | NEGATIVE HONESTY IN SERVICE

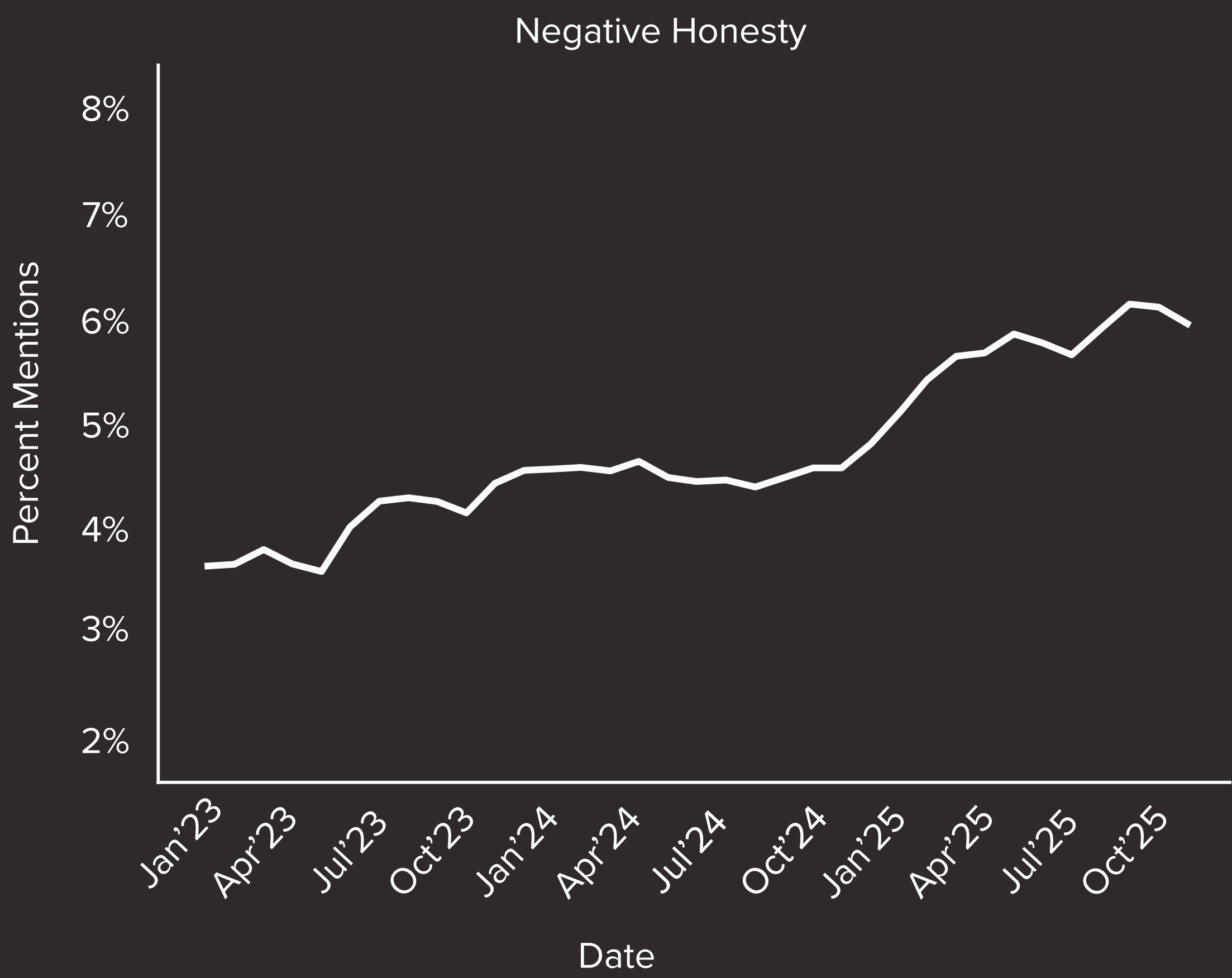
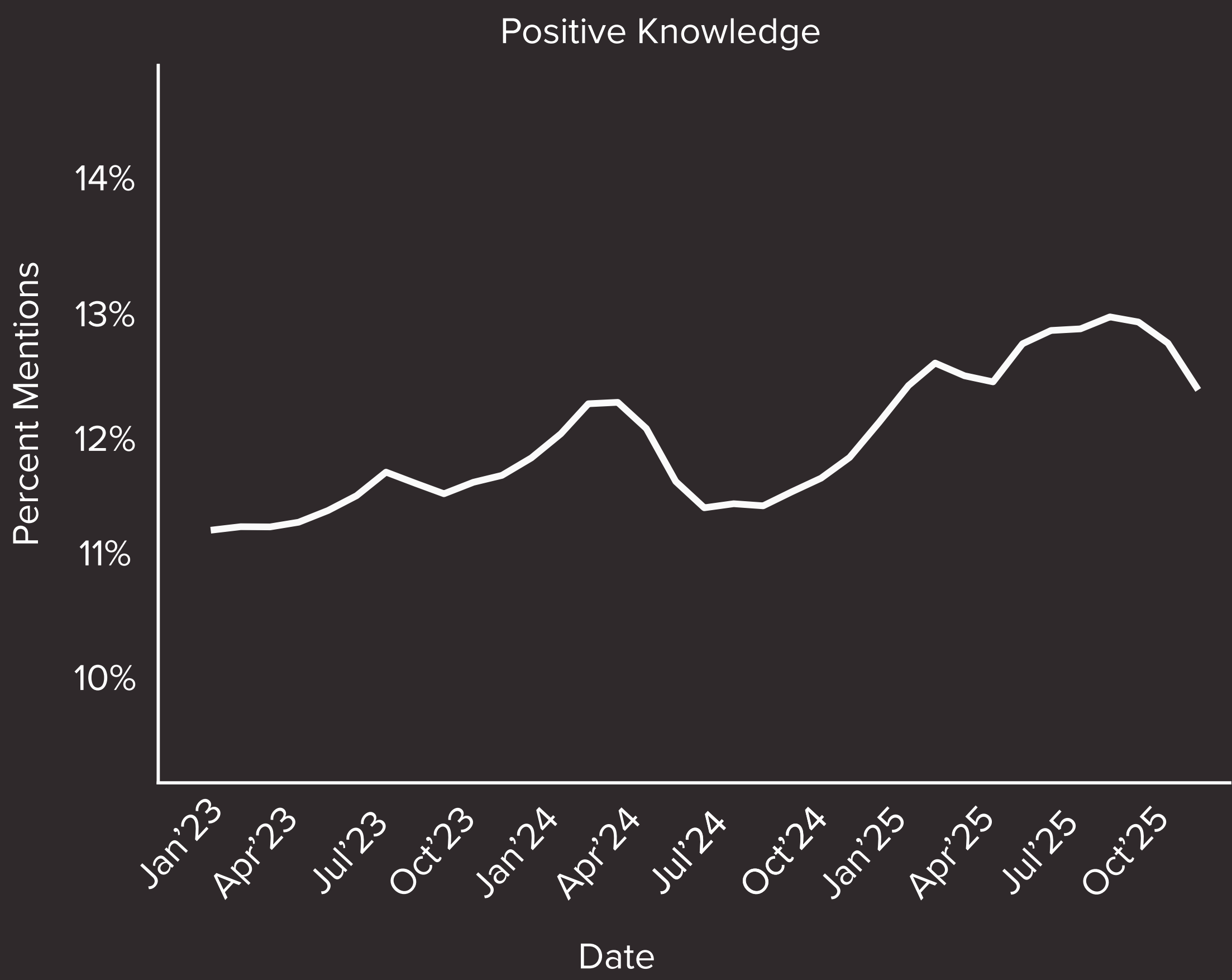


CHART 17 | POSITIVE KNOWLEDGE IN SERVICE

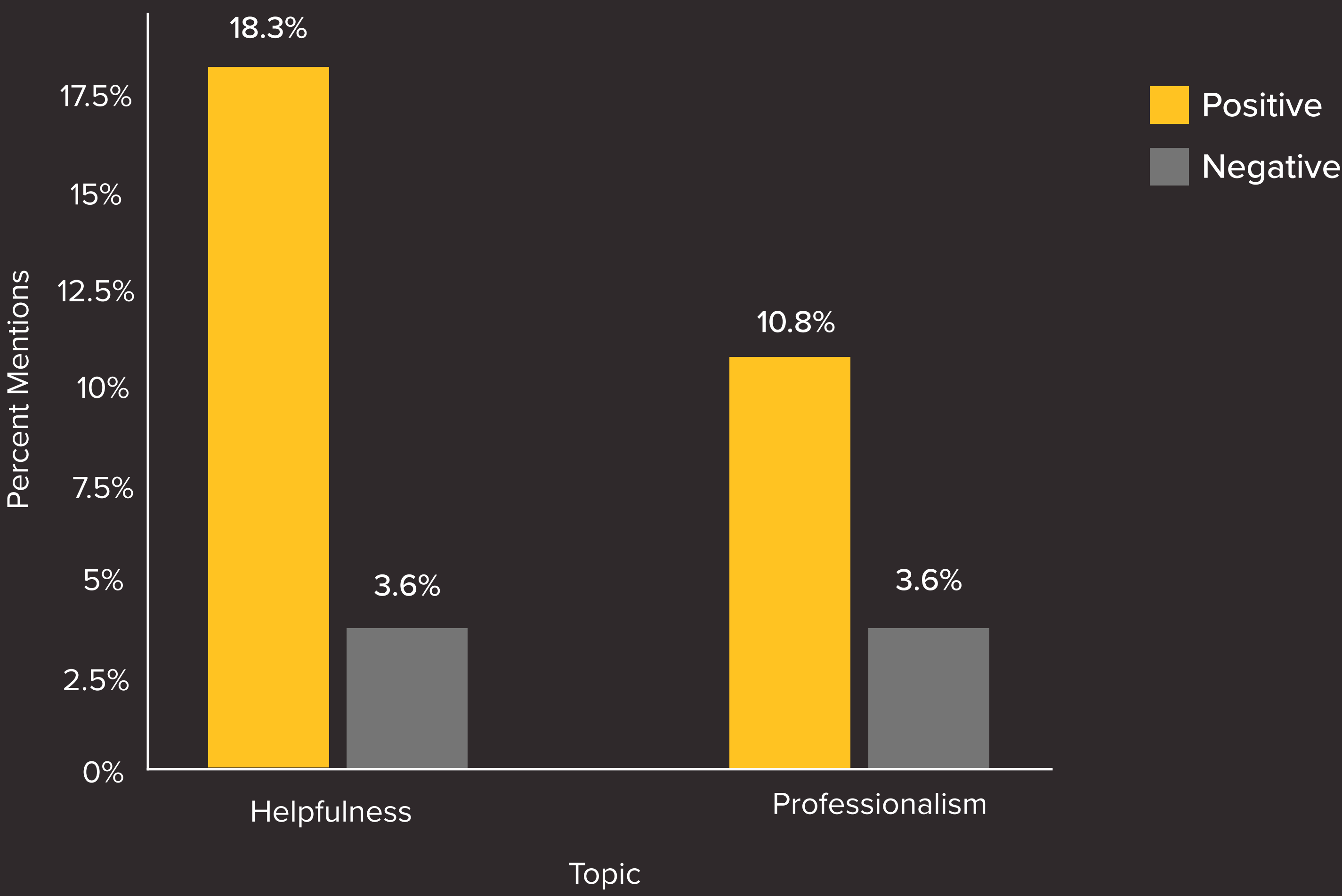


Even as technical knowledge scores fluctuate, the human element continues to preserve the Service experience. Professionalism and Helpfulness act as the department’s primary buffers or “safety net” against negative reviews.

Professionalism: Despite a 9.2% rise in negative mentions, the category maintains a powerful 3:1 positive-to-negative ratio. Roughly 10.8% of reviews cite it as a win, while only 3.6% cite it as a fail.

Helpfulness: A heavy lifter of positive sentiment, driving 18.3% of all positive reviews, successfully offsetting a minor 2.4% increase in negative friction.

CHART 17 | HELPFULNESS & PROFESSIONALISM SENTIMENT Q4



Management, on the other hand, appears in 20.5% of negative service reviews, almost always tied to unresolved issues or communication breakdowns during an escalation. Because Service Managers are more tenured than their Sales counterparts, they are the department’s greatest asset in stabilizing these environments.

However, they are increasingly being used as a stopgap to cover for the knowledge deficits of newer advisors. For 2026, the focus must shift from retention to technical mastery to ensure that Advisor-level turnover doesn’t continue to erode the perception of honesty.

2026 TAKEAWAYS FOR FIXED OPS TEAMS:

- ▶ Standardize customer updates for every repair. Set fixed communication points so customers always know status, timing, and next steps.
- ▶ Honor appointment start times. Schedule to get vehicles into a bay quickly or reset expectations immediately when delays occur.
- ▶ Eliminate post-repair idle time. Trigger pickup notifications as soon as work is complete and remove bottlenecks tied to wash, paperwork, or keys.
- ▶ Set and communicate diagnostic timelines. Same-day diagnostics should be the goal. When delays happen, explain them early and clearly.
- ▶ Keep the service drive calm and visible. Lobby chaos affects both service satisfaction and vehicle sales decisions.

WHAT VARIABLE TEAMS NEED TO KNOW HEADED INTO 2026

1. STAFF IS THE #1 DRIVER OF SALES SENTIMENT, AND IT'S UNDER PRESSURE

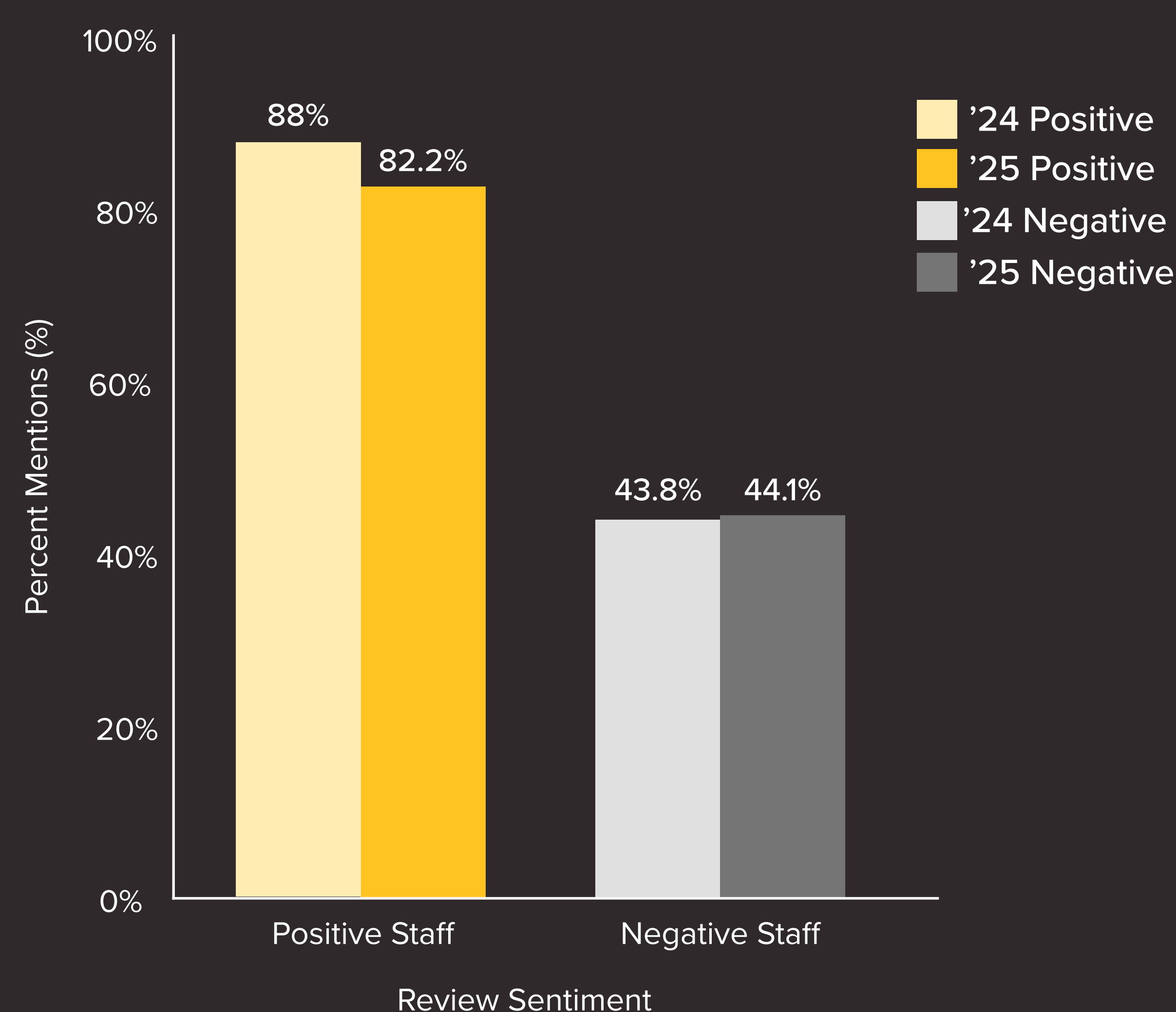
Staff interactions dominate sales perception more than any other factor.

In 2025, “staff” appeared in roughly 82% of positive Sales reviews, reinforcing how much a positive buying experience hinges on the person across the desk. But that same visibility cuts both ways. Negative staff mentions showed up in 44% of negative Sales reviews, and while that figure declined slightly in Q4 (-4.1%), even minor missteps remain highly visible.

Follow-up gaps. Poor explanations of numbers. Slow responses after initial contact. These issues overshadow otherwise sound processes.

Staff behavior now functions as a reputational amplifier. When execution is strong, it elevates the entire dealership. When it breaks down, no amount of process or pricing discipline offsets the damage.

CHART 18 | STAFF SENTIMENT IN SALES REVIEWS YOY



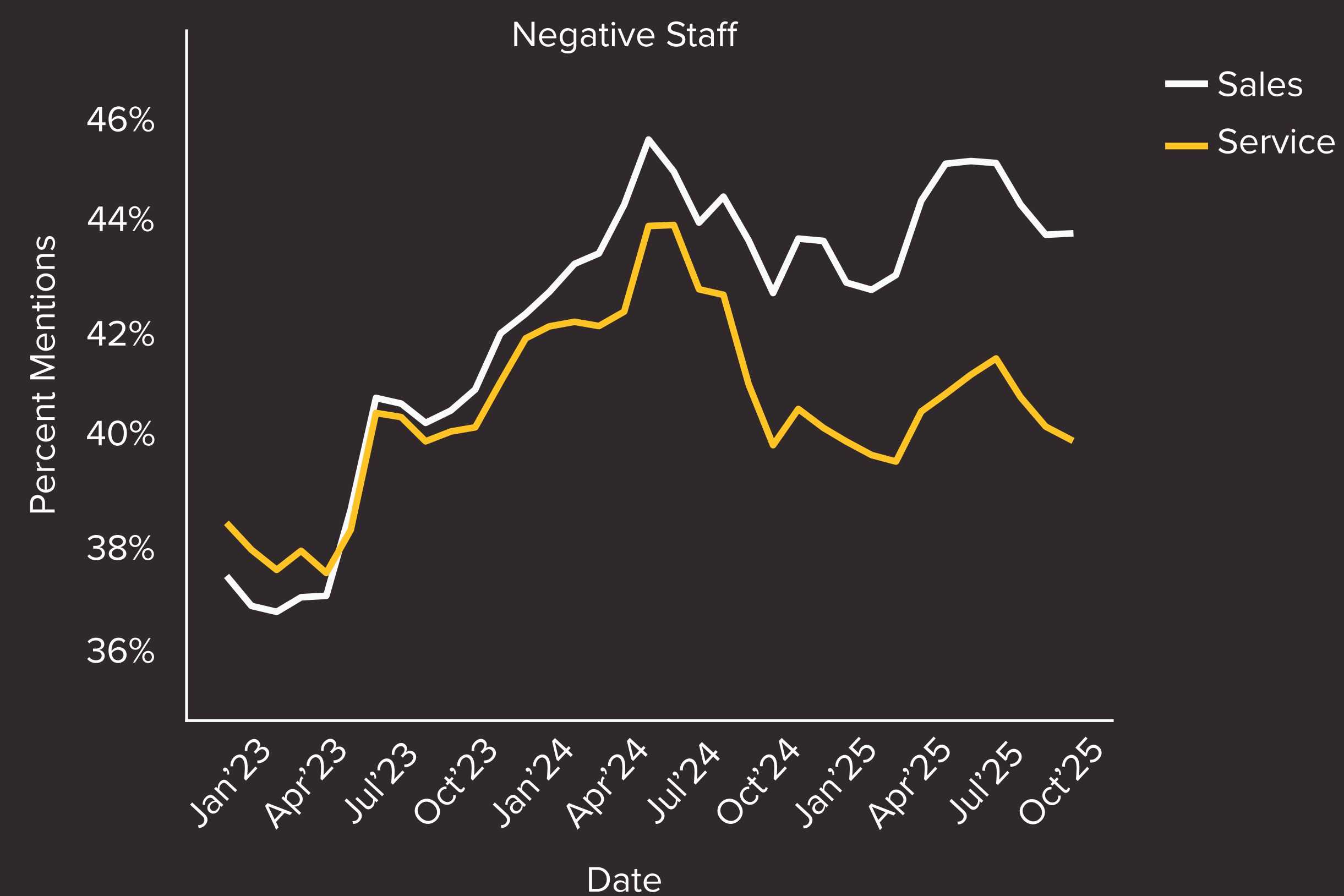
2. HIGH TURNOVER CREATES PERCEIVED DISHONESTY

Sales teams face the highest personnel risk in the dealership, and customers feel it immediately.

Sales Consultants churn at 66%, with a median tenure of just 2.2 years. That turnover leads to inconsistent answers and shifting explanations. Customers do not interpret this as a training issue. They interpret it as deception.

Departmentally, Sales shows greater exposure to staff instability. In Q4, staff-related negativity was higher in Sales (43.76%) than in Service (40.09%), making Sales the most sensitive department to retention gaps.

CHART 19 | STAFF NEGATIVITY SALES AND SERVICE



Consistency matters more than charisma. Stable teams with shared language protect trust even when deals get complex.

3. AI DISCOVERY & PLATFORM DIVERSIFICATION

Google Alone Is No Longer Enough

Sales teams have historically optimized for Google reviews. That approach is now incomplete.

AI discovery has changed how customers build shortlists. ChatGPT cannot see Google reviews, which means a dealership that only generates feedback on Google is effectively invisible to ChatGPT-driven searches.

Platform diversification now directly impacts sales visibility:

- ▶ *Yelp and DealerRater are surfaced in AI-generated “best dealer” summaries.*
- ▶ *Dealer groups with diversified review footprints are more likely to appear in AI-assisted consideration stages, before a customer ever clicks a website.*

In 2026, a strong review strategy is about discoverability, not just reputation.

4. COMMUNICATION IS A SALES PROBLEM

Sales no longer gets a pass.

Communication issues appeared in 47.86% of negative Sales reviews in Q4. Misalignment, delayed responses, and unclear next steps consistently drive frustration.

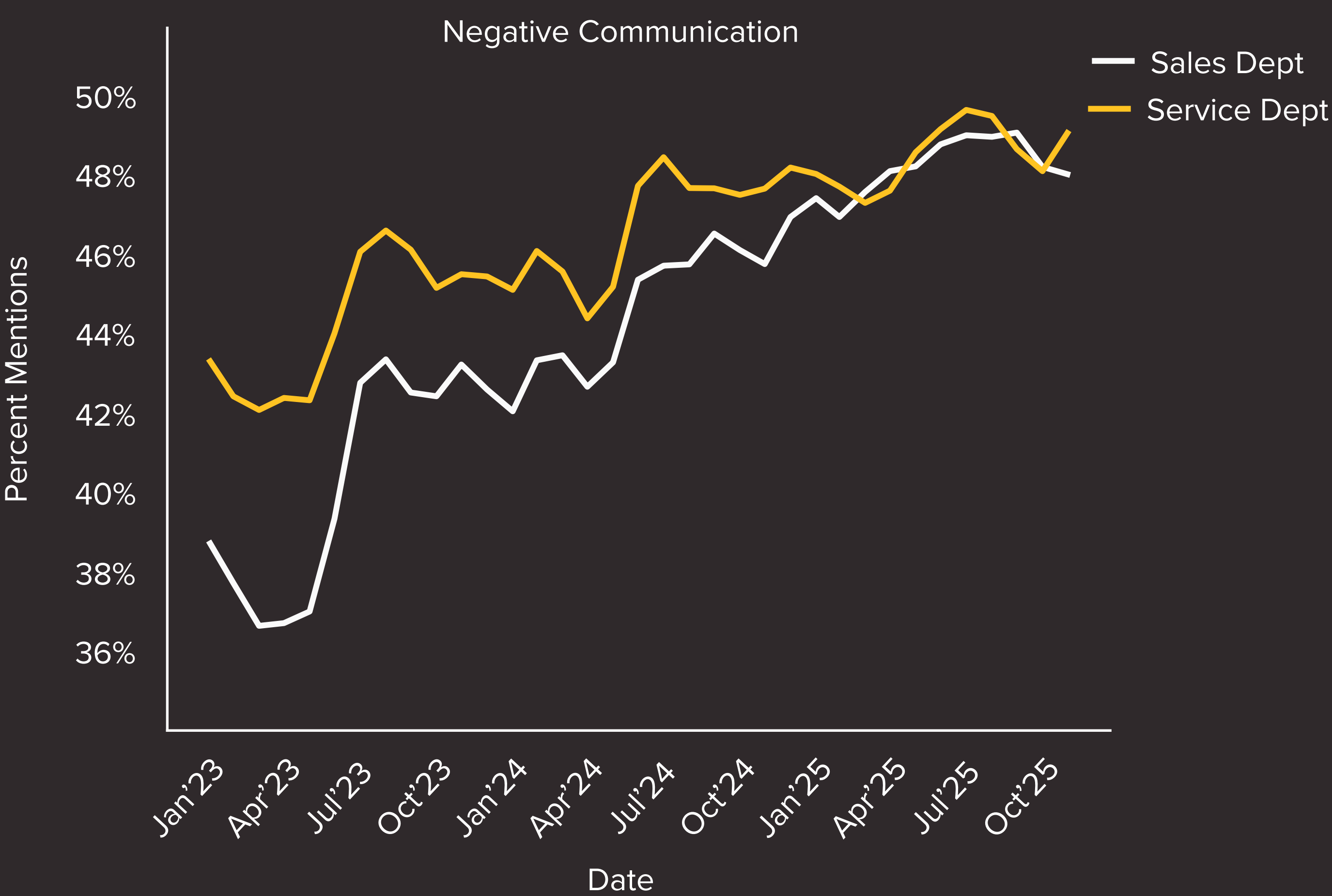
Communication gaps have been traditionally framed as a Service problem. That separation no longer exists.

Customers experience the dealership as a single system. Confusion during pricing discussions, delays during paperwork, or silence after delivery directly impact perceptions of professionalism and integrity.

The End of the Sales Buffer

Sales once benefited from emotional momentum. Excitement over a new purchase masked friction. That buffer is gone.

CHART 20 | SALES AND SERVICE COMMUNICATION NEGATIVITY CONVERGE



- ▶ In Q4, Sales communication negativity reached 48.4%, effectively matching Service at 48.7%.
- ▶ With average payments now at \$749 per month, customers have zero patience for the post-signature void.
- ▶ The most common high-severity complaint during peak negativity periods is simple and damaging: “Nobody followed up.”

Communication issues now account for nearly half of all negative Sales feedback. Clarity after the deal matters as much as persuasion before it.

5. PRICE NEEDS TO MATCH VALUE

The Supply Story Is Over

The Sales narrative shifted sharply in late 2025.

Complaints about inventory dropped 8%, while Sales price negativity climbed to 20.2%. Full lots have reset expectations. Customers now expect justification, not explanations about market conditions.

When buyers still see \$50k transaction prices, they feel overcharged unless value is clearly articulated.

This is not a demand for cheaper cars. Regional data shows otherwise. The West remains expensive while maintaining strong positive sentiment. What customers want is transparency.

They want to understand:

- ▶ What they are paying for
- ▶ Why it costs what it does
- ▶ How the deal compares to expectations set earlier in the process

Price without context creates resentment. Price explained early and consistently preserves trust.

6. REGIONAL SALES STRATEGIES

One Closing Style Doesn't Fit All

VOC data shows clear regional differences in what customers reward and punish. Sales leaders can't rely on a single playbook. Execution needs to flex based on how buyers in each region perceive price, fairness, and effort.

Before looking at regional sales behaviors, it helps to ground the conversation in price reality. The chart below shows how dealership pricing in each region compares to the national average, and how customers respond to those differences in reviews. At scale, pricing alone isn't the deciding factor. How that price is experienced is.

Price Parity Index: 100 = National Average

REGION	REGIONAL PRICE PARITY	POSITIVE PRICE MENTIONS (VS. BENCHMARK)	NEGATIVE PRICE MENTIONS (VS. BENCHMARK)
West	102.0 (Highest Cost)	+10.7%	-0.3%
Northeast	101.4	+7.3%	+1.1%
South	95.2	-7.7%	-1.9%
Midwest	92.9 (Lowest Cost)	+1.9%	+4.2%

Customers interpret price through different lenses depending on region. The same pricing strategy can feel fair, inflated, or misleading based on local expectations.

Midwest: Precision Wins

Price sensitivity runs high, with a +4.2% increase in negative price sentiment. Every fee must be justified. Processes must feel clean and deliberate. Friction kills deals here faster than elsewhere.

West: Relationships Protect Margins

The West sustains higher prices, but only when Friendliness and Communication stay strong (we're talking +14.3% above the positive benchmark level strong). High margins require emotional connection, not just product confidence.

South: Integrity Is the Differentiator

This region shows a +50.6% positive lift tied to avoiding bait-and-switch behavior. Sales teams win by positioning themselves as the honest alternative in a skeptical market.

Northeast: Efficiency Over Charm

Customers reward speed and competence. Financing complaints are down 16.7%, and staff knowledge matters more than rapport. Minimize small talk. Get the numbers right. Move quickly.

2026 TAKEAWAYS FOR DEALERS

- ▶ Stabilize the message, not just the roster. High turnover is inevitable. Inconsistent explanations are not. Shared language around pricing, trade-ins, and next steps is the fastest way to protect trust.
- ▶ Design follow-up to be part of the sale. The deal is not done when papers are signed. Silence after delivery is now one of the fastest paths to negative sentiment.
- ▶ Expand review presence or disappear from AI discovery. A Google-only strategy limits visibility. Diversified reviews determine whether your store shows up in AI-generated dealer recommendations.
- ▶ Sell the value before defending the price. Customers are no longer accepting “market conditions” as an answer. Price must be framed early, clearly, and consistently across every touchpoint.
- ▶ Treat Sales communication as a brand risk. Communication issues now drive nearly half of negative Sales feedback. At this scale, clarity is no longer a soft skill. It is a core operational control.

WHAT WE CAN LEARN FROM TOP 150 GROUPS

1. USE PRICING AS A BRAND LEVER:

Across the industry, only 4% of reviews mention price positively, but some dealer groups far exceed that benchmark. The common thread: they make price clear early and consistent, presenting it as part of their brand rather than a negotiable detail.

Customers notice when price is visible upfront. Reviews highlight phrases like:

- ▶ “No dealer fees”
- ▶ “No hidden fees”
- ▶ “The price on the window was the price I paid”
- ▶ “Out-the-door price shown upfront”

This clarity influences decisions. Customers cite pricing transparency as a reason they traveled long distances, ended comparison shopping, or felt confident in their purchase.

Top-performing groups show positive price mentions 55–75% above the industry average.

Top 5 Groups by Positive Price Mentions:

DEALER GROUP	POSITIVE PRICE MENTIONS
Mullinax Automotive	10.72%
Del Grande Dealer Group	6.55%
Martin Management Group	6.42%
McGee Automotive Family	6.41%
Neilsen Automotive Group	6.03%

Mullinax Automotive, with 10.7% of its positive reviews mentioning price, sees a 76% higher share of positive price mentions than the industry.

The effects of this are felt elsewhere throughout the customer experience. Mullinax’s positive Inventory mentions are at 5.1%, 54% above the industry benchmark. There is a broader perception of value tied to what customers see upfront at Mullinax.

Lower-performing groups, by contrast, see positive price mentions 50-36% below the industry benchmark.

Bottom 5 Groups by Positive Price Mentions:

DEALER GROUP	POSITIVE PRICE MENTIONS
Casa Auto Group	1.98%
Serra Automotive Group (AL)	2.31%
Principle Auto Group	2.38%
Hendrick Automotive Group	2.41%
Page Auto Group	2.54%

In reviews for these groups, price mentions appear less frequently and are framed differently, focusing on:

- ▶ Negotiation effort
- ▶ Individual accommodation
- ▶ Salesperson persistence

Price clarity is tied to sales-side experiences rather than overall dealership perception.

CX RECOMMENDATIONS: HOW TO INCREASE PRICE POSITIVITY AT YOUR DEALERSHIP

- ▶ Present pricing clearly at the start of the sales process. Make it part of the brand story.
- ▶ Keep fees and add-ons visible to reduce surprises.
- ▶ Ensure consistency across locations and channels. Customers notice and remember when pricing is predictable and transparent.
- ▶ Track reviews for language about price visibility. Mentions like “expected” or “upfront” indicate positive alignment; mentions of negotiation or deals suggest it’s still operational rather than brand-led.

2. IS YOUR STAFF NEGATIVITY “OPERATIONAL” OR “CULTURAL?” HERE’S HOW TO FIND OUT:

**From an analysis of 2025 reviews mentioning staff for the top and bottom performing top 150 Auto groups.*

38% of negative reviews mention Staff, making it the 2nd largest driver of negativity among the Top 150 dealer groups. But not all complaints are the same.

The data splits cleanly into two patterns:

1. Cultural failures that break trust
2. Operational breakdowns that frustrate customers

Negativity Tier 1: Cultural Failure

This is the highest risk category. The 3 groups with the highest Staff negativity are:

1. Fletcher Jones Auto Group: 52.2%
2. Hertrich Autogroup: 49.0%
3. Team Gillman Auto Group 48.7%

At this level, issues aren’t isolated. The same tone shows up across Sales, F&I, and Service experiences. Customers describe being pressured, misled, or intimidated, and reviews often use language like:

- ▶ “They’re crooks.”
- ▶ “They tried to scam me.”

The issues shared in this tier are inherently emotional or damaging, so not only is the deal lost, but customers are more prone to actively warn others away.

2. STAFF NEGATIVITY (CONTINUED)

Tier 2: Operational Friction

This category is lower risk and fixable. The 3 groups with the least Staff negativity are:

- 1. Georgica Auto Holdings: 26.7%
- 2. Byers Automotive Group: 27.1%
- 3. Gunn Auto Group: 27.4%

Here, the failures are smaller and usually contained. Customers still report frustration, but it’s tied to missed callbacks, sloppy delivery, technical errors, or uneven staff performance. Reviews use language like:

- ▶ “They’re disorganized.”
- ▶ “They wasted my time.”

These complaints are fixable with training, clearer procedures, and accountability.

A Simple Diagnostic:

- ▶ Named employees and cross-praise → operational issues, fixable with training
- ▶ References to staff or management with hostile language → culture problem, needs broader attention

SIGNAL	CULTURE ISSUE	OPERATIONAL ISSUE
Who’s named	“The staff,” “management,” or “everyone”	Specific employees
Type of complaint	Deception, hostility	Incompetence, delays
Cross-praise	“Avoid this dealership.”	“She was great, but...”
Severity	Financial, legal, or safety risk	Annoying, fixable

What Actually Drives Staff Negativity:

Across thousands of reviews, the same behaviors show up repeatedly:

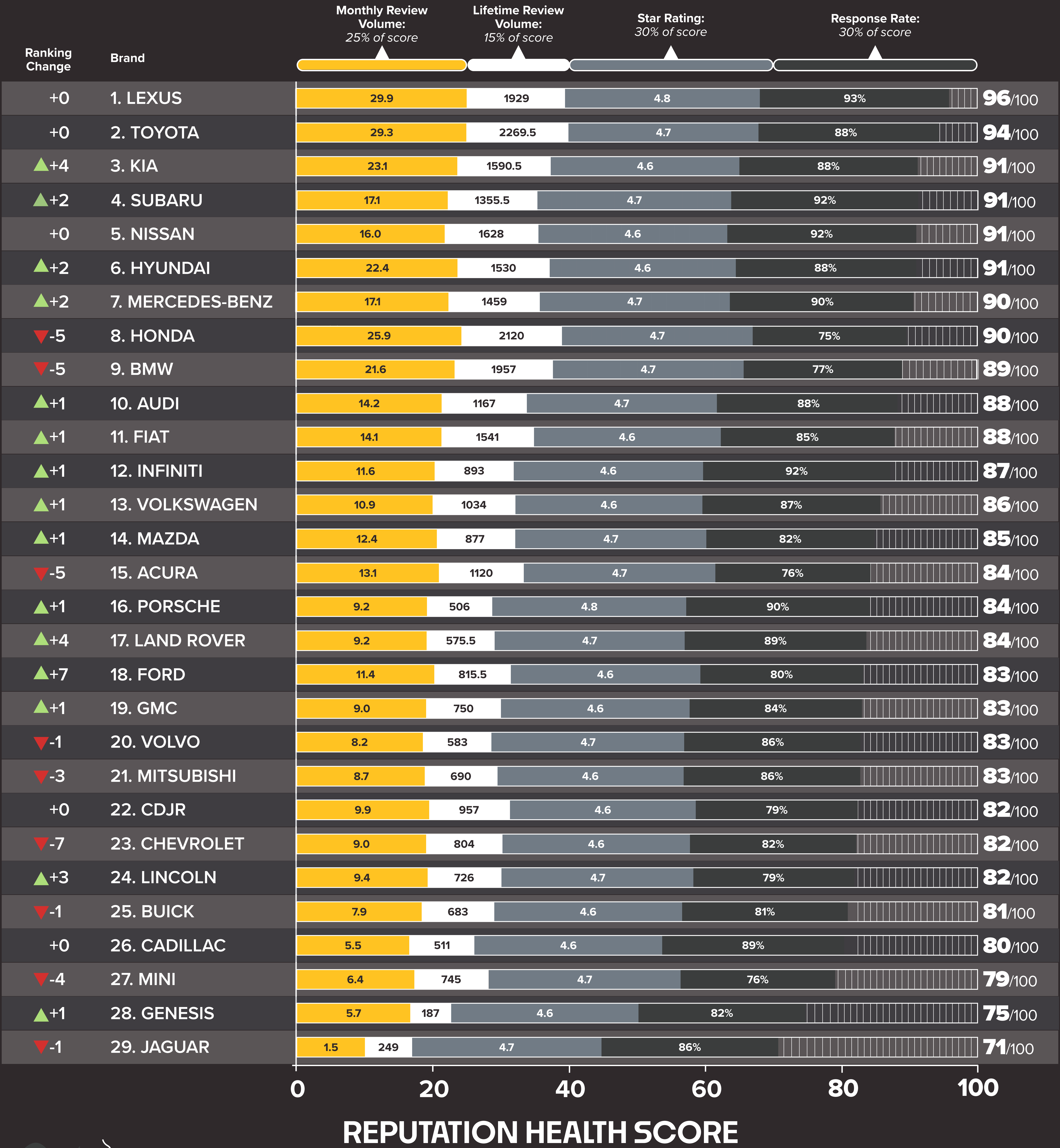
- ▶ Hostility
Customers feel dismissed or talked down to.
“Cold. Condescending. Dismissive.”
- ▶ Deception
Pricing games or misrepresented vehicles.
“Broken AC and brakes they didn’t disclose.”
- ▶ Time Disrespect
Missed promises and long waits.
“Three hours for an oil change, and nothing was done.”
- ▶ No Follow-Through
Customers get ghosted after payment.
“They said they didn’t even have my car.”
- ▶ Technical Mistakes
Errors that erase trust.
“Quoted \$3,000. Another shop fixed it for \$500.”

Bottom line: Not all staff negativity means the same thing. Some of it’s operational. Some of it’s cultural. The fastest path to fixing it starts with knowing which one you’re dealing with.

CX RECOMMENDATIONS: HOW TO MITIGATE NEGATIVITY AT YOUR DEALERSHIP

- ▶ Identify whether complaints target individuals or the organization’s culture.
- ▶ For operational issues, focus on training, clear processes, and follow-through.
- ▶ For cultural issues, examine tone, expectations, and leadership behavior across teams.
- ▶ Monitor reviews for language patterns to track improvements and spot emerging problems early.

2025 AUTOMAKER REPUTATION RANKINGS



All Franchise Dealers: Custom 2025 Reputation and CX Report Available Now

Widewail has reputation scorecards on hand for 18,000 new car dealerships in the US. Scorecards cover all Google reviews left Q1 through Q4 of 2025.

Each dealership's report includes:

- **Reputation Health Score**

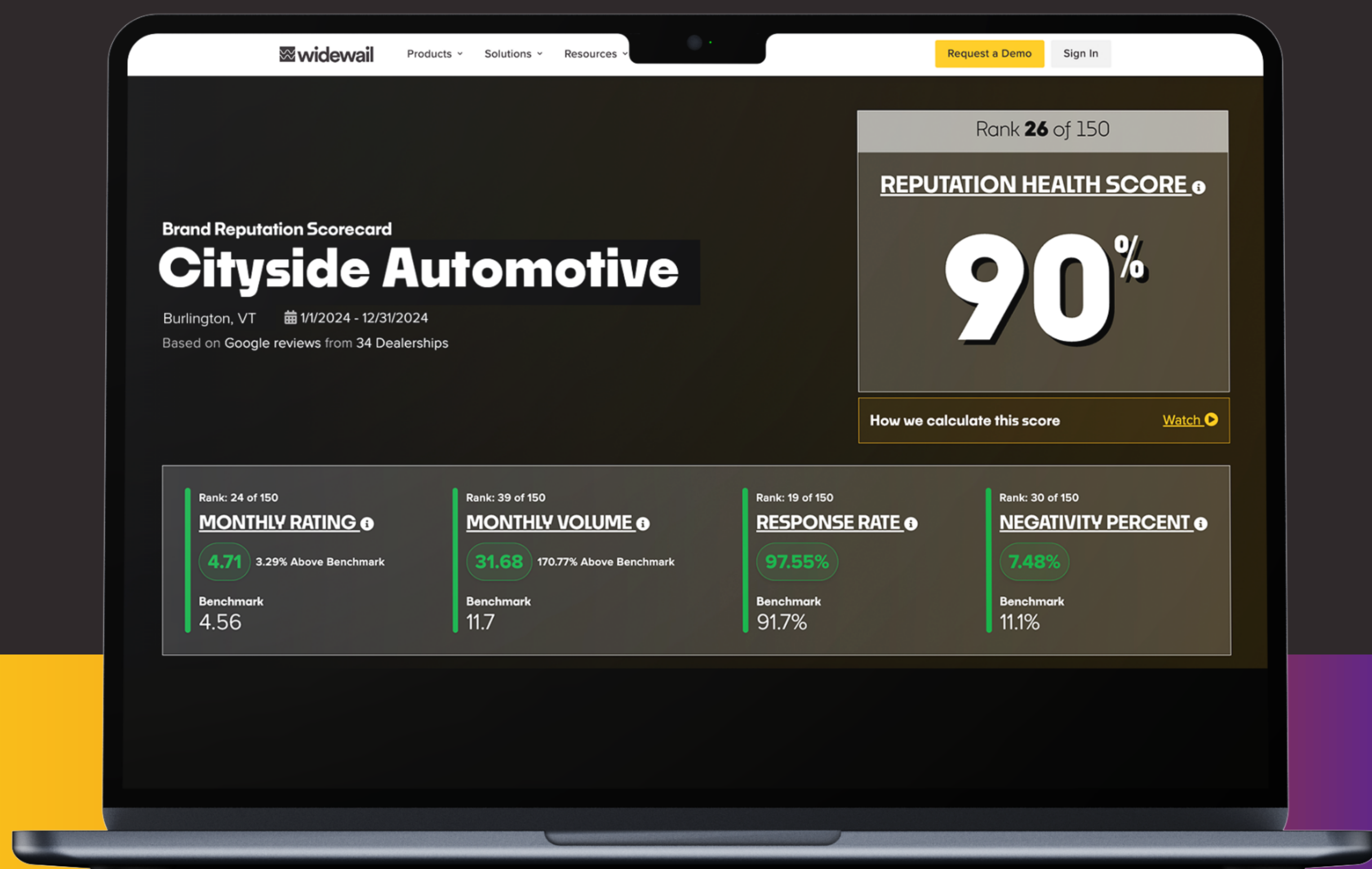
A single metric for your store's overall reputation health, and a breakdown of the major components that contribute to that score.

- **Reputation Benchmarks**

See how your performance compares to national averages.

- **Topic & Sentiment Analysis**

Learn what customers praise and complain about across your reviews. We've topic-tagged all of your Google reviews in 2025 using Widewail Customer Intelligence.



Get Your Free Report

widewail.com/free-automotive-reputation-scorecard-report

"The reporting, the rich content Widewail creates—it's all valuable. As a marketer, I've taken their data and used it. We even replicated one of their studies because it was so useful."

George Jones
Marketing Director, Haselwood Automotive Group



What Widewail Customers Are Saying

Based on 15+ million reviews, the data in this report offers the most complete picture of reputation performance in the industry heading into 2026. Here’s how leading dealer groups are using Widewail to power their automated feedback engine and turn insights into smarter decisions and stronger outcomes.

Select Clients:

DEALER WORLD

LITHIA



WEST HERR
NEW YORK

Cavender
AUTO FAMILY

northtown
automotive companies



SLOANE

M MCGOVERN
AUTOMOTIVE GROUP

jiffylube



“You can delegate everything except accountability. At the end of the day, I don’t care about credits. I care if my customers are happy and if reviews are answered on time. Before switching back to Widewail, we were losing far more than we were saving.”

George Jones
Haselwood Auto Group



→ 4.7 average star rating
across all locations



→ 820% Review volume growth.
Negative reviews down 24%,
1,957% more Google visibility.

“It’s great for us to have one vendor. The value Widewail adds through their simple process and real human responses—something not every vendor offers—has made a big difference for us.”

Chuck Dortenzio
Curtiss Ryan Honda

We knew we needed a solution. We remembered Widewail from our days at Dealer.com, and that’s when we realized: Google wants us to stay on top of this, Google likes for us to stay on top of this, and we have to figure out how to do so efficiently. It became clear that partnering with Widewail would be more cost-effective and provide the support we needed across all locations.”

Jennifer Martel
McGovern Auto Group



→ Rooftops average 41 reviews
per month, nearly four times the
industry average of 11.7

MCGOVERN + WIDEWAIL

Before

9,690

Google reviews

After 1 Year with

18,831

Google reviews

+84%

GOOGLE REVIEW VOLUME

#10

TOP 150 DEALER GROUPS

