

THE 2026 STATE OF DIGITAL RETAIL IN AUTOMOTIVE

Q3 2026 Executive Intelligence Report

**The Digital Blind Spots Reshaping the Automotive Customer
Journey**

JourneyVantage Automotive

Independent analysis for dealership leaders

Executive brief

Dealerships have more digital tools than ever. That does not mean they can see everything that is influencing the customer.

Most stores can see website traffic, leads, calls, chats, appointments, CRM activity and sales.

What is harder to see is everything the customer did before becoming a lead - marketplace research, reviews, search, video, competitor shopping and, increasingly, conversations with AI tools.

That leaves a gap between what the customer actually does while shopping and what the dealership can see in its reporting. We call that the **Digital Visibility Gap**.

Cox Automotive reports that 63% of in-market shoppers expect to use AI during their next vehicle purchase, while only 29% of dealers say they are actively adjusting for AI-powered search. [1]

Autotrader attribution research found an average of 62 touchpoints across four channels in the buyer journey. The average dealership in that research tracked about two. [2]

This report looks at seven places where dealership leaders may not be getting the full picture. The point is to understand what current systems can see, what they cannot see, and where that can affect decisions.

Four numbers that frame the issue

63%	29%
Shoppers likely to use AI on their next vehicle purchase [1]	Dealers actively adapting for AI-powered search [1]
82%	62
Dealers reporting some AI use [1]	Average buyer touchpoints in cited research [2]

None of these figures tells the whole story by itself. Together, they point to the same issue: customer behavior is changing faster than many of the systems dealers use to measure that behavior.

The CRM only sees part of the story

Your CRM can tell you a lot about a customer once you know who that customer is. The harder part is seeing what happened before that.

Autotrader's 2025 attribution research reported an average of 62 touchpoints across four channels in a vehicle buyer's journey. The average dealership in the analysis tracked about two. [2]

In the roughly 875,000-sale sample, only 8% of sales could be traced through a CRM lead submission. [2]

This does not mean the CRM is broken. It means the CRM was designed to manage known customers and opportunities. A lot of shopping now happens before the customer raises a hand.

A buyer may visit marketplaces, read reviews, watch videos, compare vehicles, search several dealerships and ask an AI tool for recommendations before ever calling or submitting a lead.

You see the eventual sale. You may not see much of what helped create it.

What this means for dealers

Keep measuring leads and conversions, but do not assume the last measurable action tells the whole story. Ask a second question: **What actually helped this customer choose our store?**

AI is becoming another way customers find dealerships

Customers no longer have to search through ten links to get an answer. They can simply ask a question.

Cox Automotive found that 63% of in-market shoppers expect to use AI during their next vehicle purchase. [1]

In the same research, AI tools were already close to automotive-specific websites as a research channel: 36% versus 38%. [1]

Dealers are not moving at the same pace. Only 29% said they were actively adjusting for AI-powered search. Another 32% knew they needed to do something but had not started. [1]

A shopper can now ask which nearby stores have the best selection, who has a good reputation, which dealership appears transparent on pricing, or where to start looking for a specific vehicle.

The answer may narrow the customer's list before a dealer website ever gets a visit. [7]

What this means for dealers

Start checking the same questions your customers are likely to ask. **Does your store show up? What does the answer say about you? Which competitors show up instead? What information seems to be driving those answers?**

Dealers are using AI. Measuring it is another story.

AI adoption has moved quickly. Clear measurement has not always moved with it.

Cox reports that 82% of dealers are using AI in some form. Common uses include routine tasks, customer follow-up and content creation. [1]

At the same time, roughly one-third of AI-using dealers either are not measuring its impact or are unclear about how it is being measured. [1]

There is also a gap between expectations and results so far. Sixty-nine percent expected AI to help grow sales or revenue. Twenty-two percent reported seeing that result. [1]

That does not automatically mean the tools are failing. Some may save time or improve consistency before they show up in sales.

The problem is simpler: if nobody defined what success should look like, it becomes very hard to know whether a tool is earning its keep.

What this means for dealers

For every meaningful AI tool or use case, write down four things: **What problem are we solving? Where are we starting? What number should improve? When are we checking it again?**

Online and in-store can still feel like two different deals

The customer does not care which dealership system owns which part of the process.

Capital One's research shows how hybrid car buying has become. Eighty-six percent of dealers said digital tools give them a competitive advantage. [4]

Yet shoppers who spent more of the process in person reported feeling more in control than shoppers who handled more of it online. [4]

The real issue is not online versus showroom. It is whether the two work together.

If a customer enters trade information, chooses a vehicle, discusses a payment or completes other steps online and then has to start over when someone else takes over, the customer is seeing the cracks between your systems and departments.

What this means for dealers

Mystery-shop the handoff. Start online and follow the process through a phone call or showroom visit. Count how many times the customer has to repeat something, wait for someone to catch up, or hear information that does not match what they saw online.

Your VDP has to do more than list the car

For many shoppers, the vehicle detail page is where a big part of the buying decision happens.

Autotrader's attribution research found that 48% of shoppers in the cited study started on a marketplace, 23% started with a search engine and only 14% started on a dealer website. [2]

Eight in ten interacted with a third-party site somewhere in the journey. [2]

By the time those shoppers reach your VDP, they may already have looked at several similar vehicles.

Your page has to help answer some basic questions quickly: Is this the right vehicle? Is the price believable? What condition is it in? Why this one instead of the similar unit down the road? Can I trust this store?

A VDP can have every required field filled out and still do a poor job selling the vehicle if the photos, pricing, description or next step leave the customer with more questions than answers.

What this means for dealers

Look at VDPs the way a shopper does. **Does this page make the vehicle easier to choose and the store easier to trust?** That is a different test than simply asking whether the inventory feed is complete.

The last click does not tell you why the customer chose you

Dealership reporting often gives credit to the last thing it can see. That is useful, but it can be misleading.

A customer may research for two weeks, see your inventory on a marketplace, read your reviews, compare you with another store and then Google your dealership name before calling.

Search may get the credit because it was the final measurable step. That still does not tell you what put the dealership on the customer's list in the first place.

Autotrader's multi-touch research points directly to this problem in a journey involving dozens of interactions. [2]

If leadership only looks at the last visible touch, channels that helped create awareness or confidence earlier in the process can look less valuable than they really were.

What this means for dealers

Use two views. **What captured the lead?** And **what helped influence the customer's choice?** They are related questions, but they are not the same question.

More technology does not always mean an easier experience

A new tool can make a dealership more efficient without making the process noticeably better for the customer.

CDK's 2026 Friction Points research reported faster transaction times and stronger technology adoption, but buyer Net Promoter Score for dealership buyers fell from +48 to +29. [3]

CDK also continued to find friction around areas such as pricing transparency and wait times. [3]

Capital One found another interesting split: shoppers who spent more of the process in person were more likely to describe the experience as transparent and say they felt in control. [4]

So the question is not whether the dealership has the technology. The question is whether the technology actually made things easier for the customer.

What this means for dealers

Measure the things customers actually feel: **waiting, repeating information, unclear pricing, slow responses, inconsistent answers and unnecessary handoffs**. If those do not improve, the technology may be helping the dealership more than the customer.

The Digital Visibility Gap

Dealerships can see a meaningful part of the customer journey. The blind spot is everything happening outside that view.

WHAT THE DEALERSHIP CAN USUALLY SEE

- Website visits
- Lead submissions
- Calls and chats
- Appointments
- CRM activity
- Digital retail activity
- Sales

THE VISIBILITY GAP

The gap between the activity that may influence the customer and the smaller portion that appears in normal dealership reporting.

What the customer may actually do

- Social discovery
- Marketplace research
- Google searches
- Reviews and video
- OEM research
- AI questions and recommendations
- Inventory comparisons
- Competitor shopping
- Dealer and competitor VDPs
- Offline conversations
- Store visits
- Purchase

Customers do not shop according to dealership reporting categories. They move from one source to another depending on what they are trying to figure out. As that journey spreads across more places - including AI - website traffic and lead volume tell less of the story by themselves.

Q3 2026: numbers worth watching

SIGNAL	READING	WHY IT MATTERS
Dealer AI adoption	82%	AI is already in the dealership. [1]
Shopper AI intent	63%	Customers are starting to use AI for vehicle research. [1]
Dealers adapting for AI search	29%	Dealer readiness trails shopper interest. [1]
Average journey touchpoints	62	A lead report sees only part of the shopping path. [2]
Average channels used	4	Customers move between multiple sources. [2]
Dealers citing a digital advantage	86%	Dealers see digital tools as competitive infrastructure. [4]
U.S. franchised dealers	16,991	Size of the franchised network, H1 2026. [6]
H1 2026 dealership sales	\$640B+	Customer-journey decisions sit inside a very large retail business. [6]

NADA reports that 16,991 franchised light-vehicle dealers sold 7.9 million light-duty vehicles in the first half of 2026, with total dealership sales above \$640 billion. [6]

Five questions worth asking at the next manager meeting

1

Do we really know how customers are finding us before they become leads?

2

Do we know what AI tools say when shoppers ask about dealers, inventory or buying options in our market?

3

When a customer starts online, does that work carry into the phone call or showroom - or do we make them start over?

4

Do we know the difference between what captured the lead and what actually helped the customer choose us?

5

Are we measuring the friction the customer feels, or mostly the activity our departments produce?

A simple 30/60/90-day approach

First 30 days - Find out what you can and cannot see.

Map the main ways customers find the store. Check search, marketplaces, reviews, AI answers, VDPs and CRM attribution. Separate what you know from what you assume.

By 60 days - Fix the obvious gaps.

Start with problems customers are most likely to notice: wrong public information, weak merchandising, online-to-store disconnects, confusing pricing, slow response or obvious visibility problems.

By 90 days - Check it again.

Run the same searches, AI questions and customer journeys. See what changed. Assign someone to own the review so it does not become a one-time exercise.

Research notes

This report is JourneyVantage Automotive's independent review of publicly available automotive retail research. JourneyVantage did not conduct the underlying surveys and the organizations cited here do not endorse this report.

The studies cited use different samples, questions, field dates and populations. Their numbers should be read in the context of the original study rather than combined into a single industry score.

JourneyVantage uses the term **Digital Visibility Gap** for the difference between the customer activity that may influence a purchase and the smaller portion a dealership can normally see through its own systems.

Primary sources

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[6] NADA Data, 2026 Mid-Year Report.
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[7] Cox Automotive, How AI Is Influencing Vehicle Discovery and What Dealers Can Do About It, August 2026.
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About JourneyVantage Automotive

JourneyVantage Automotive looks at the part of the customer journey that dealerships often cannot see clearly - what happens before a shopper becomes a known lead.

Our work focuses on digital visibility, AI-powered discovery, competitive positioning and the public information that can influence whether a dealership makes a shopper's consideration list.

Insights. Strategy. Better Performance.

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