

VOICE OF THE CUSTOMER REPORT

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Analyzing Customer
Review Data in Automotive

2023

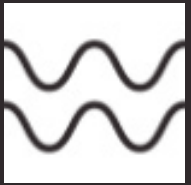
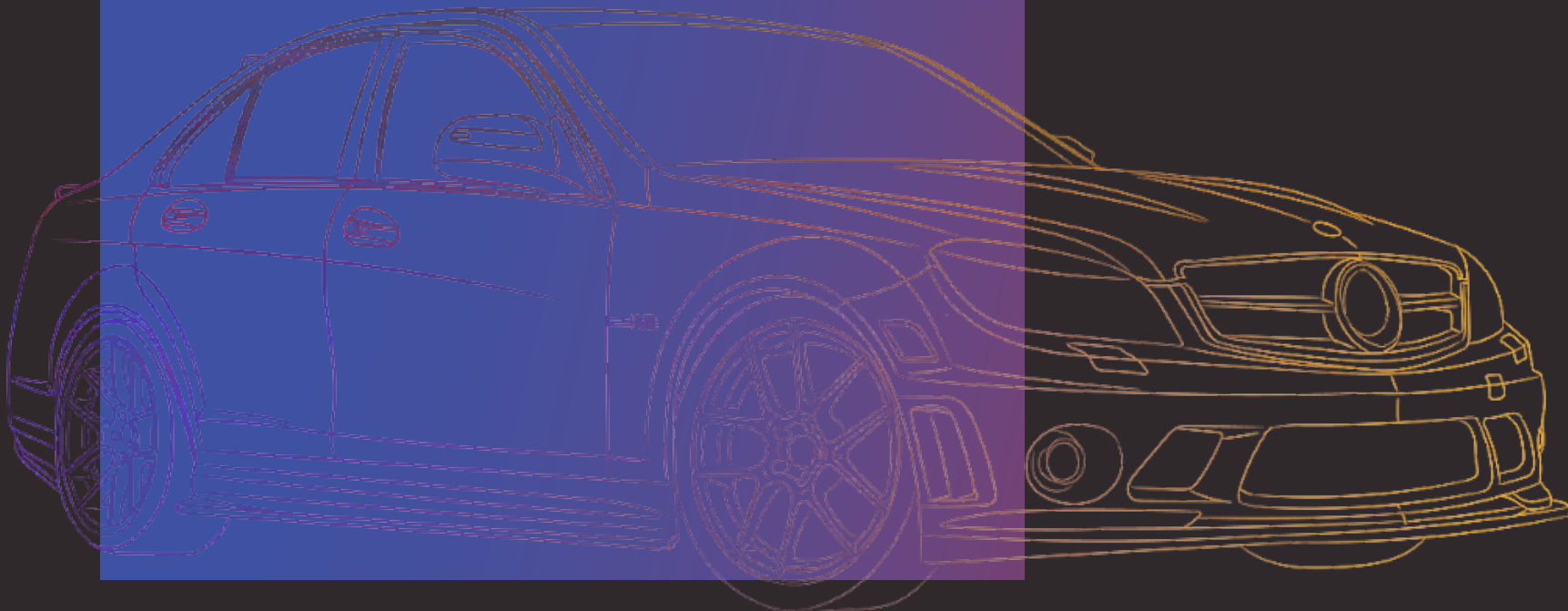
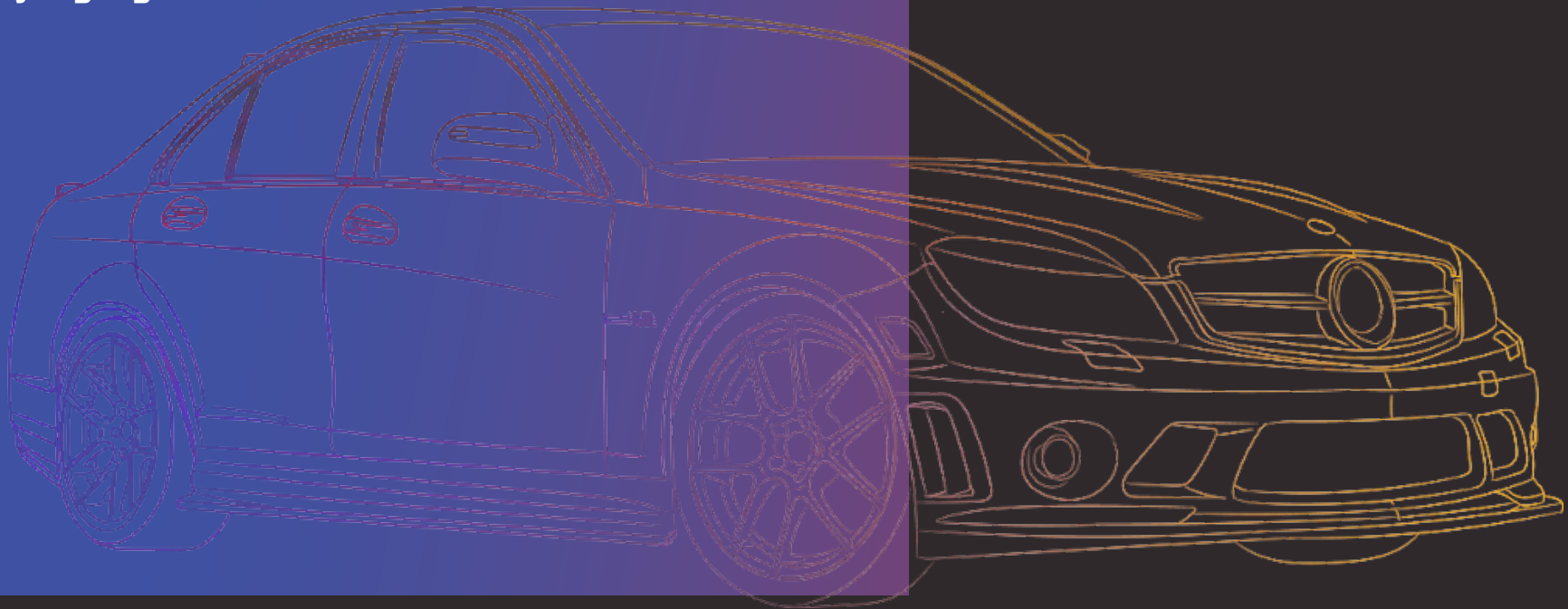


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Findings

Positive Staff Interactions Are the Leading Cause of Positive Reviews

4 and 5-star reviews most often highlight staff members who are helpful, friendly and professional, suggesting customers find these qualities most important.

Poor Communication is the #1 Issue for Service

Improving communication in service departments should be the top area of focus for dealers. Negative reviews most frequently comment on the service department, often mentioning a breakdown in communication related to repairs and wait times.

Pricing is Only Mentioned in 11% of Reviews

Although the cost of a new vehicle is up 61% since 2012, consumers infrequently mention pricing in reviews. Prices are likely meeting consumer expectations.

Interest Rate Hikes Don't Impact Negative Reviews

Customers rarely mention special pricing deals or discounts in positive or negative reviews.

Ev Customer Sentiment is High but Lower Than Industry Averages

Dealership reviews with mentions of EVs trend slightly below the industry average, though many EV customers are happy.

Tesla Sentiment is the Lowest in the Study

Tesla has surprisingly low ratings: 32.5% of Tesla reviews are negative. We attribute this to a few contributing factors: the unique role of the Tesla showroom, the high average cost for major repairs and a lower-than-average review volume performance.

Deals Neither Make Nor Break the Customer Experience

Customers rarely mention special pricing deals or discounts in positive or negative reviews.

Overview

What are customers in the automotive industry saying right now? How can you create the perfect car-buying experience? What makes a successful service visit? What role does dealership staff play in making customers happy? What do consumers think of electric vehicles today?

We will answer these questions in the 2023 Widewail Voice of the Customer Report, in which we studied the voices of today's automotive customers by compiling dealerships' existing Google reviews. Reviews give us a unique peek under the hood to understand today's automotive customer experience.

Methodology

We collected 1.5 million Google reviews from 16,000+ new car dealerships in the U.S. spanning from February - June of 2023. Widewail's data science team performed a topic and sentiment analysis on 800,000 of these reviews with sufficient content to understand exactly what car buyers are saying about their experiences right now and how the topics mentioned correlate to positive or negative ratings.

We analyzed **1.5 million Google reviews** from **16,000+ new car dealerships** in the US from the first half of 2023 to unlock trends in customer behavior and sentiment this year.



Tree Maps: A Data Visualization Technique

We use tree maps to illustrate what customers talk about in reviews most often. To read these tree maps, start by observing the largest topic boxes in each category. The umbrella categories and smaller topics within them tell a basic customer experience story.

For example, customers who leave positive reviews likely had a good experience with a staff member in the sales department. Few mention wait times, indicating it was not a problem. Similarly, few mention prices, indicating prices likely met expectations.

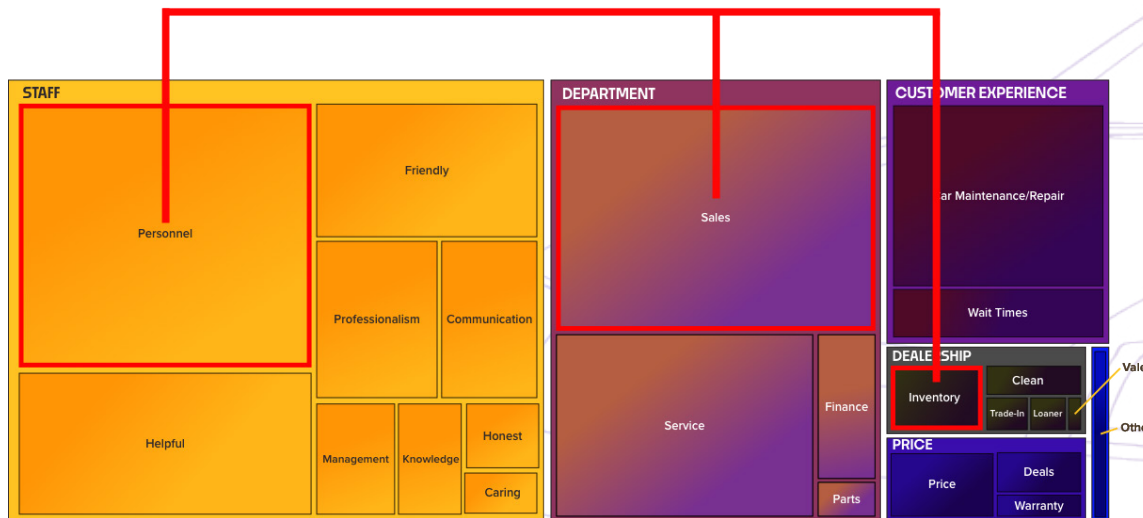
A Note from Our Lead Data Scientist

“The ‘tree maps’ are a great way of showing the frequency of topics among reviews. We’ve broken up the maps into what happy customers are talking about and what unhappy customers are talking about. The size of the box for each topic correlates with the relative proportion of mentions, meaning that the bigger the box, the more often that topic is mentioned in reviews.”

Mitch Joseph

Lead Data Scientist

PERSONNEL + SALES DEPT + INVENTORY



How to Read a Tree Map

The larger groups, separated by color, are categories.

In this report, the categories are as follows:

- » Staff
- » Department
- » Customer experience
- » Dealership
- » Price
- » Other

The smaller boxes are topics. The topics within each category are:

Staff

- » Personnel
- » Helpfulness
- » Friendliness
- » Professionalism
- » Communication
- » Management
- » Knowledgeable
- » Caring
- » Honesty
- » Bait & switch

Department

- » Sales
- » Service
- » Finance
- » Parts

Dealership

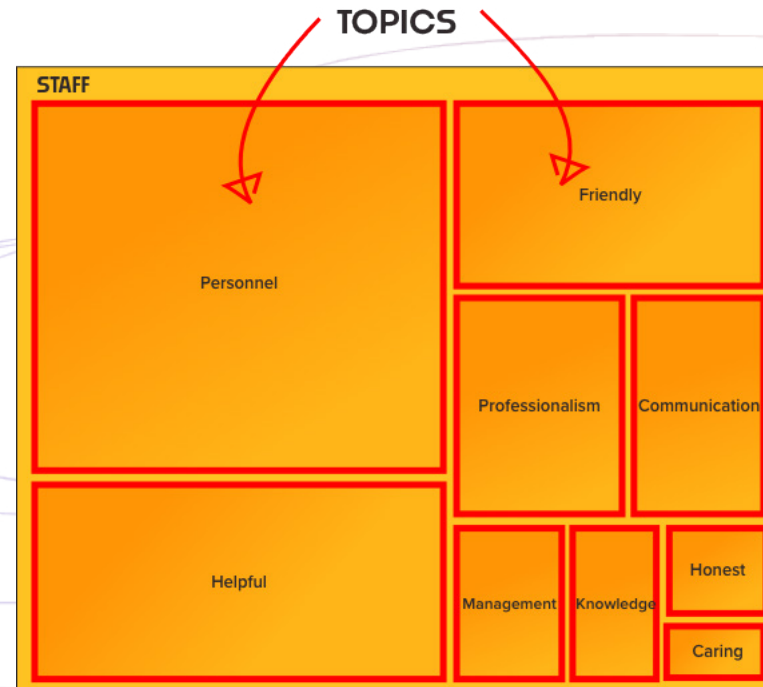
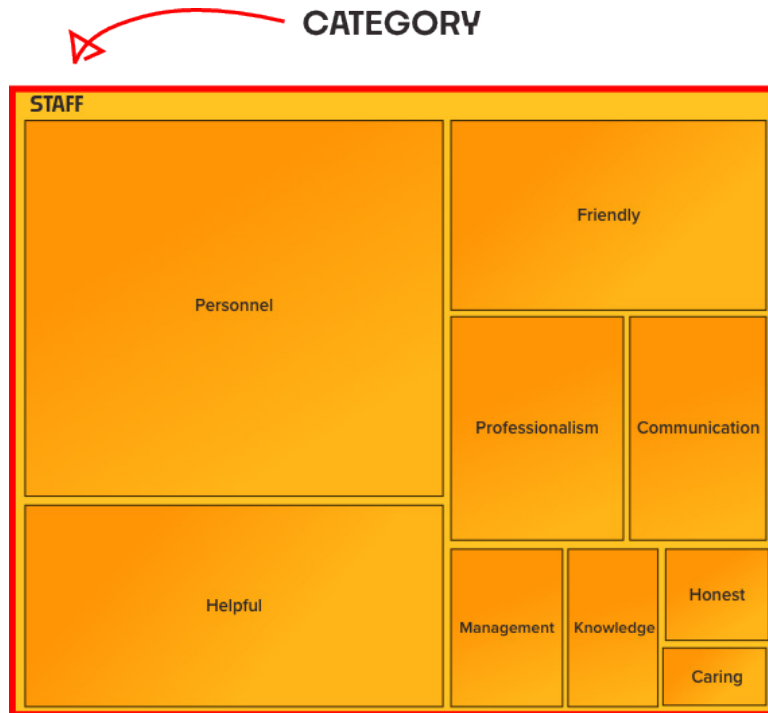
- » Cleanliness
- » Inventory
- » Trade-in
- » Loaner car
- » Valet

Customer Experience

- » Car maintenance/repair
- » Wait times
- » Damage done to the vehicle

Price

- » Price/cost
- » Deals
- » Warranty



Understanding the Data

Details on Topic Tags

In this report, we analyzed the topics discussed in reviews by using a tagging system, assigning topics to reviews based on the review content. Widewail's sentiment analysis tools tag each review with single or multiple topics, depending on the context. For example, a single review can have topic tags for personnel, service, wait time and price. Though the study analyzes 800,000 reviews, the total number of topic tags is 2.3 million.

Reviews vs. Mentions

Throughout this report, we refer to two distinct metrics: a percentage of reviews and a percentage of mentions. While the former compares a smaller subset of reviews to the total number of reviews analyzed, the latter compares a smaller group of topic mentions to the total number of topic mentions. Readers should understand these data points as unique.

AUTOMOTIVE REPUTATION INDEX

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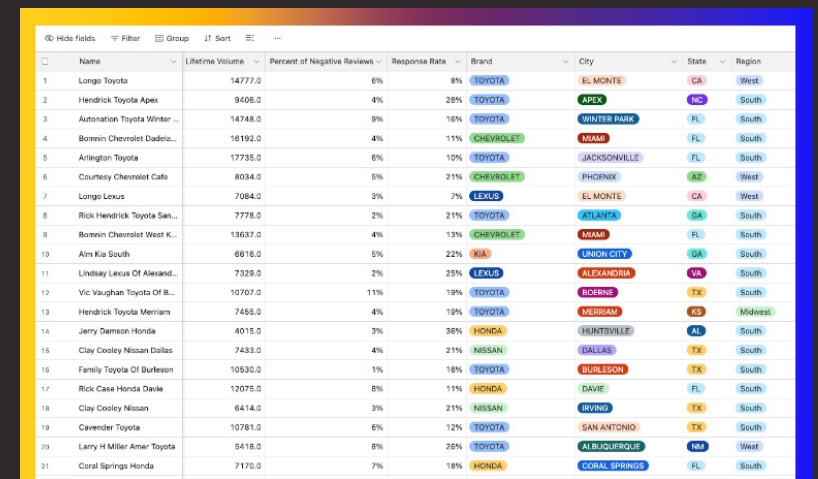
Dive Into Individual Dealership Ratings in the Automotive Reputation Index

1.6M Google reviews

16,000+ new car dealers

17 reputation, business & geographic data dimensions

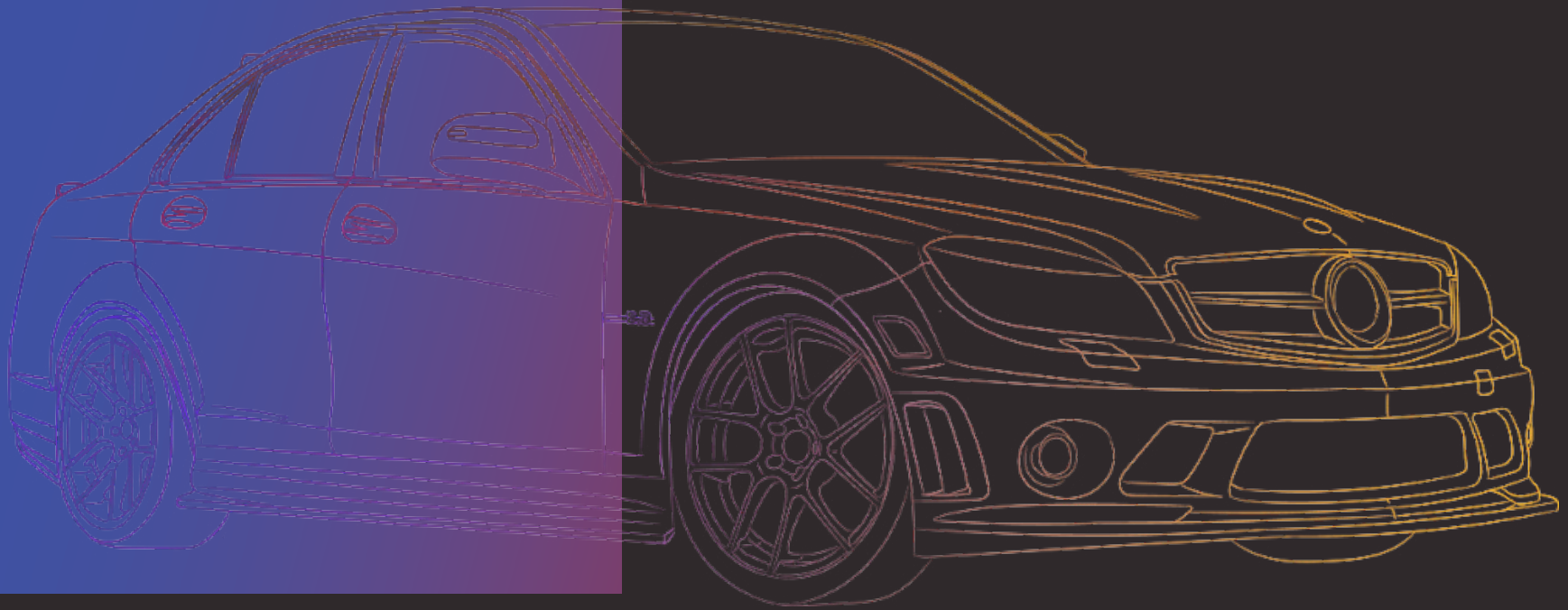
Explore Now



Name	Lifetime Volume	Percent of Negative Reviews	Response Rate	Brand	City	State	Region
1 Longo Toyota	14777.0	6%	8%	TOYOTA	EL MONTE	CA	West
2 Hendrick Toyota Apex	9406.0	4%	28%	TOYOTA	APEX	NC	South
3 Automation Toyota Winter...	14748.0	9%	16%	TOYOTA	WINTER PARK	FL	South
4 Borewin Chevrolet Dudde...	16192.0	4%	11%	CHEVROLET	MIAMI	FL	South
5 Arlington Toyota	17735.0	6%	10%	TOYOTA	JACKSONVILLE	FL	South
6 Courtesy Chevrolet Cafe	8034.0	5%	21%	CHEVROLET	PHOENIX	AZ	West
7 Longo Lexus	7084.0	3%	7%	LEXUS	EL MONTE	CA	West
8 Rick Hendrick Toyota San...	7778.0	2%	21%	TOYOTA	ATLANTA	GA	South
9 Borewin Chevrolet West K...	13637.0	4%	13%	CHEVROLET	MIAMI	FL	South
10 Aim Kia South	6616.0	5%	22%	KIA	UNION CITY	GA	South
11 Lindsay Lexus Of Alexand...	7329.0	2%	25%	LEXUS	ALEXANDRIA	VA	South
12 Vic Vaughan Toyota Of B...	10707.0	11%	19%	TOYOTA	ROBERN	TX	South
13 Hendrick Toyota Meriters	7456.0	4%	19%	TOYOTA	MERRIDIAN	MS	Midwest
14 Jerry Danson Honda	4015.0	3%	36%	HONDA	HUNTSVILLE	AL	South
15 Clay Cooley Nissan Dallas	7493.0	4%	21%	NISSAN	DALLAS	TX	South
16 Family Toyota Of Burleson	10530.0	1%	16%	TOYOTA	BURLESON	TX	South
17 Rick Case Honda Davie	12075.0	6%	11%	HONDA	DAVIE	FL	South
18 Clay Cooley Nissan	6414.0	3%	21%	NISSAN	IRVING	TX	South
19 Cavender Toyota	10761.0	6%	12%	TOYOTA	SAN ANTONIO	TX	South
20 Larry H Miller Amer Toyota	5418.0	8%	26%	TOYOTA	ALBUQUERQUE	NM	West
21 Coral Springs Honda	7170.0	7%	18%	HONDA	CORAL SPRINGS	FL	South



Benchmarks of Automotive Reputation Metrics



Map of Automotive Reputation Benchmarks

National Benchmarks:

1H '23 Monthly Median Rating: 4.41 stars

1H '23 Monthly Median Review Volume: 9.6 reviews

Dealership Average Lifetime Review Volume: 687 reviews

Percentage of Total Reviews That are Negative: 14%

Response Rate: 69%

MIDWEST

1H '23 Monthly Median Rating: 4.45 stars

1H '23 Monthly Median Review Volume: 7.4 reviews

Dealership Average Lifetime Review Volume: 526 reviews

Percentage of Total Reviews That are Negative: 13%

Response Rate: 66%

NORTHEAST

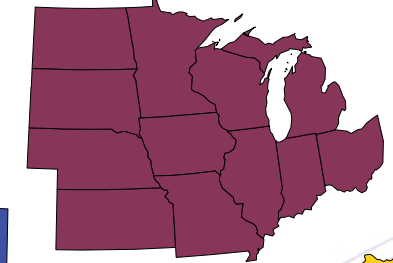
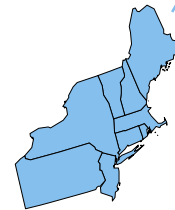
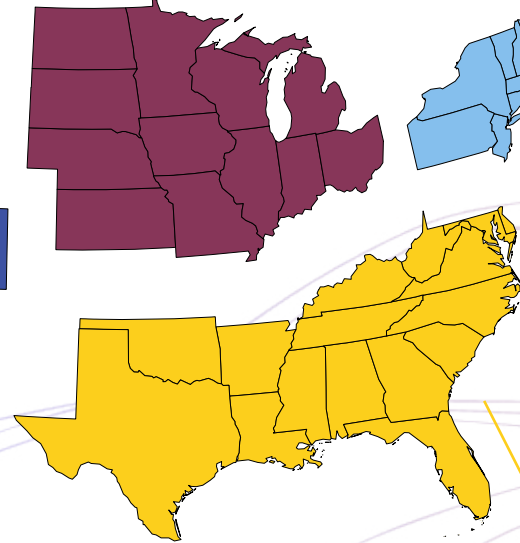
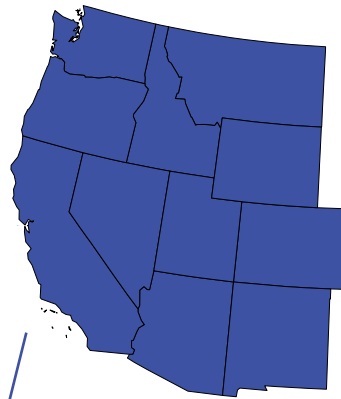
1H '23 Monthly Median Rating: 4.48 stars

1H '23 Monthly Median Review Volume: 9.1 reviews

Dealership Average Lifetime Review Volume: 632 reviews

Percentage of Total Reviews That are Negative: 13%

Response Rate: 70%



WEST:

1H '23 Monthly Median Rating: 4.31 stars

1H '23 Monthly Median Review Volume: 10.6 reviews

Dealership Average Lifetime Review Volume: 796 reviews

Percentage of Total Reviews That are Negative: 17%

Response Rate: 71%

SOUTH

1H '23 Monthly Median Rating: 4.40 stars

1H '23 Monthly Median Review Volume: 11.5 reviews

Dealership Average Lifetime Review Volume: 807 reviews

Percentage of Total Reviews That are Negative: 15%

Response Rate: 70%



Benchmarks of Automotive Reputation Metrics

In 2023, 5-star reviews were the most common and 1-star reviews were the second most common. This rating distribution in which 5-star reviews have the highest frequency and 1-star reviews have the second highest frequency is typical. We've seen this "j-curve" shape in Widewail data for years.

Dealerships Rank at These 3 Rating Tiers

Most dealers earned an average star rating of 4.5 stars or above each month. Few dealers consistently ranked below 4.0 stars.

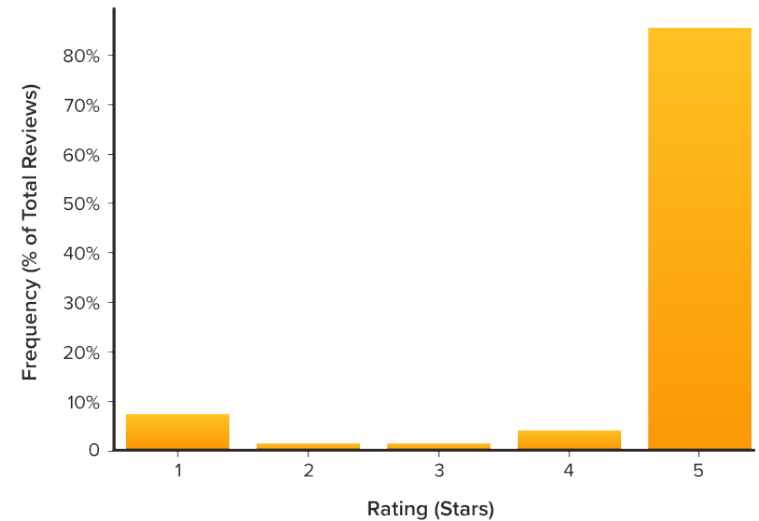
- » 64% of dealers are rated 4.5+ stars
- » 20% of dealers between 4.0-4.5 stars
- » 16% of dealers <4.0 stars

The benchmarks dealers should aim to beat in 2024:

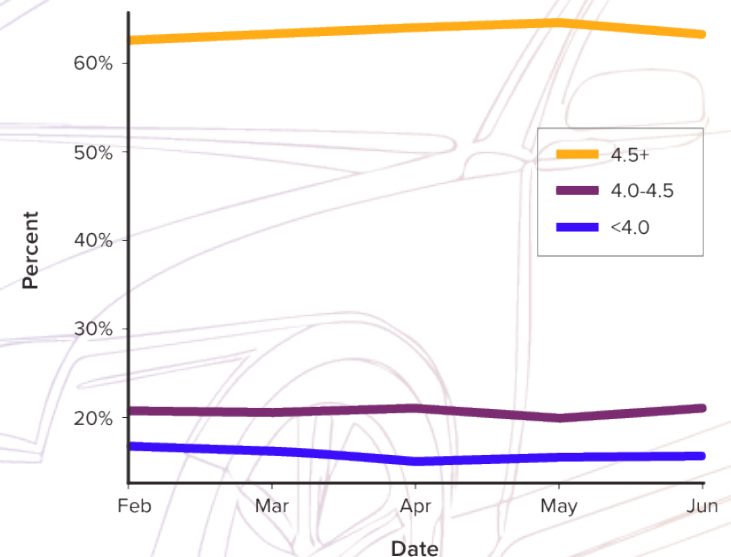
- » 90% of dealer reviews are positive (4 or 5-stars), 10% are negative (1, 2 or 3-stars)
- » The average lifetime Google star rating for a dealer is 4.44 stars **
- » 54% of dealers have a lifetime rating of 4.5 stars or above on Google
- » The average dealer receives 9 new Google reviews every month
- » 29% of dealers receive 20+ reviews a month

***Earning an average rating of 4.41 during the first half of 2023, dealers this year performed lower than the average lifetime star rating, suggesting a slight rise in average negativity in 2023 compared to past years.*

Rating Distribution



Monthly Industry Breakdown by Rating Tier

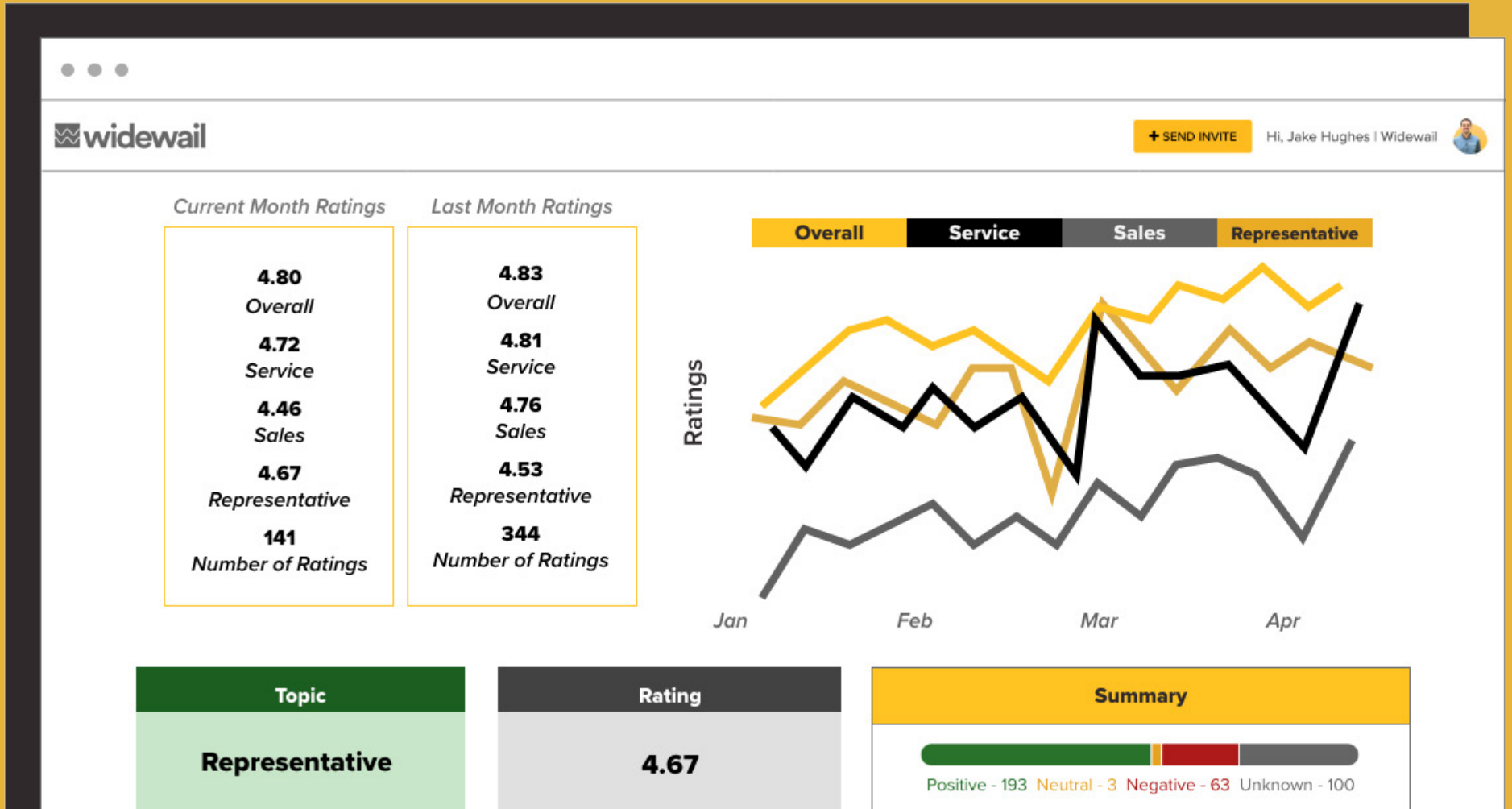




Advanced Topic & Sentiment Analysis for Your Google Reviews

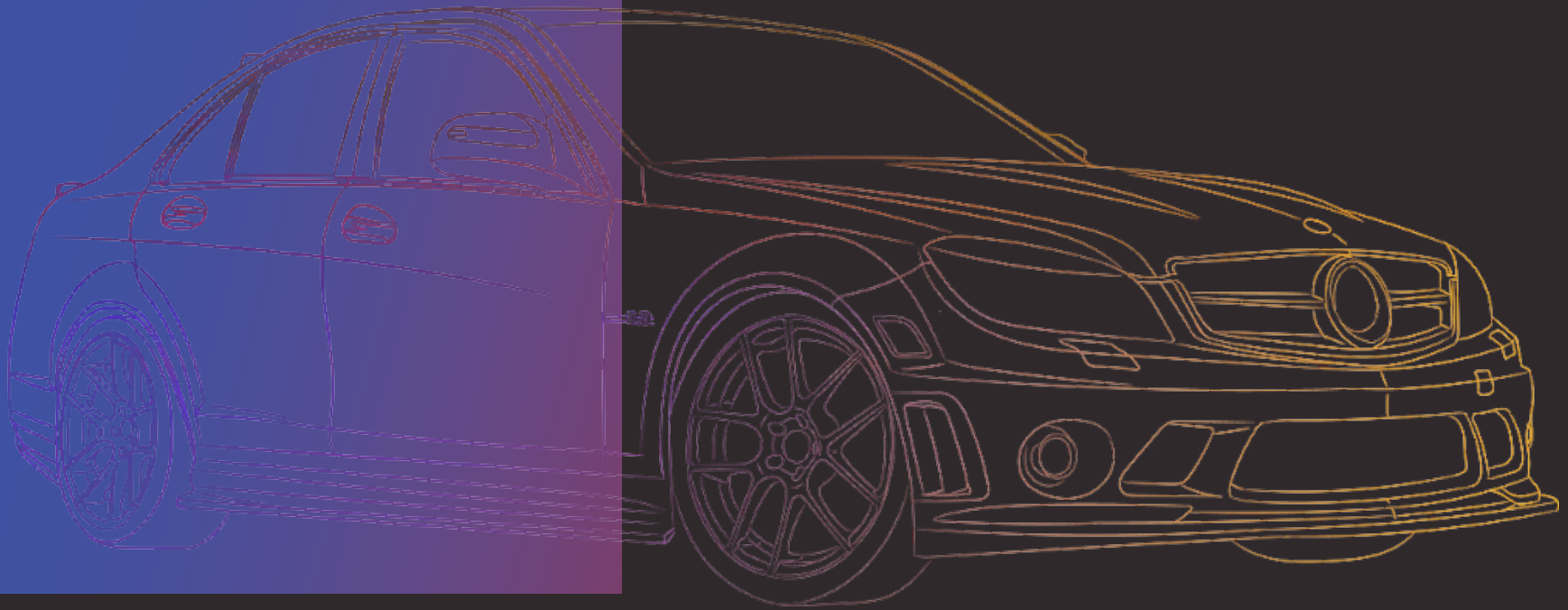
With detailed reputation reporting, natural language processing and Widewail AI-Assist, learn why, when and where your customers are satisfied.

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Customer Sentiment Trends:

What Are Happy Customers Talking About?



Anatomy of a Positive Review

Positive Staff Interactions Are the Most-Discussed Aspect of the Dealership Experience

We find that happy customers most often describe the following scenarios:

Positive Sales Reviews Most Often Mention:

Good experience with the Sales Department + Staff name is mentioned + Helpful + Friendly + Professional Team

Positive Service Reviews Most Often Mention:

Good experience with a specific member of staff + The vehicle was repaired effectively + Wait times met expectations

The image displays two callout boxes, each containing a 5-star review. The left box is for a sales review, and the right box is for a service review. Yellow lines connect specific words in the reviews to labels: 'Good Experience With Sales' points to the review text, 'Staff Name' points to the name mentioned, 'Friendly' points to the word 'friendly', and 'Helpful' points to the word 'helpful'.

Review 1 (Sales): 5 stars. "I went in with exactly what I wanted in mind, and Chris helped me find the perfect Truck for my needs. He was never pushy and super friendly and even helped me get my phone linked to the vehicle. Best experience ever with purchasing a new vehicle. Would recommend him to all my friends who are looking to purchase a new car or truck."
Tabi in Columbus

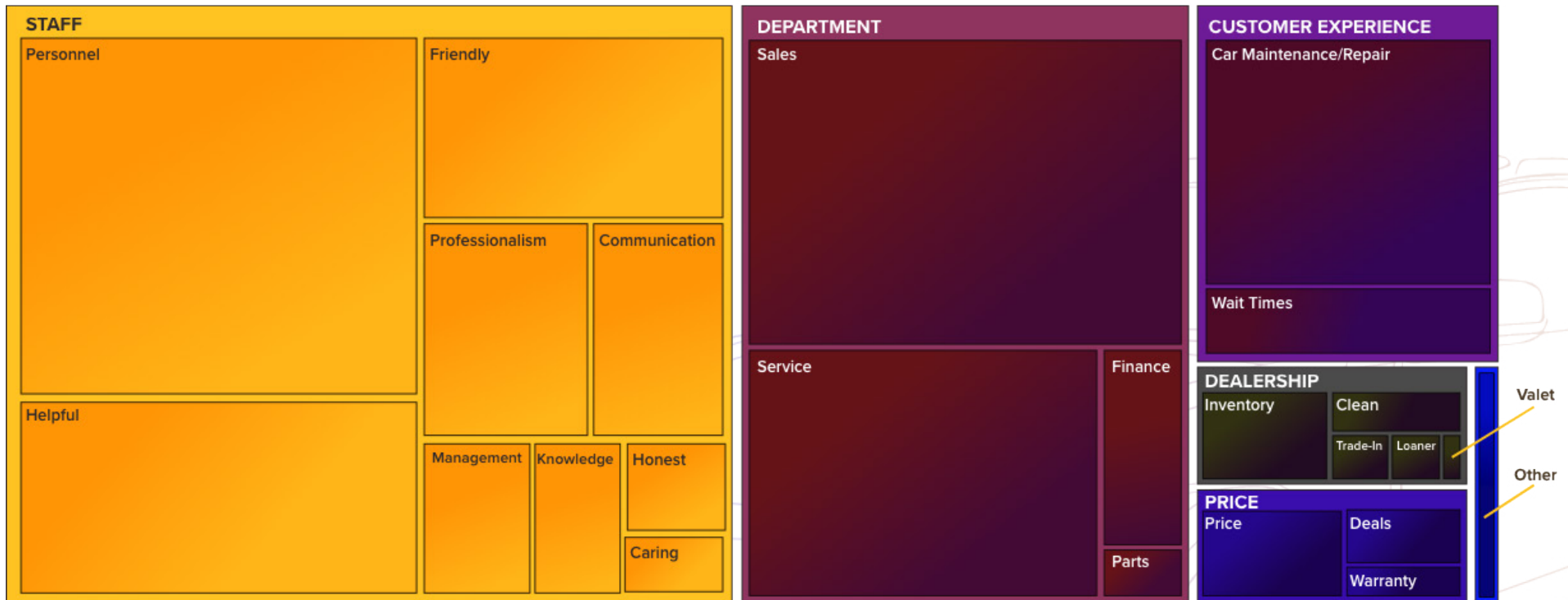
Review 2 (Service): 5 stars. "Nelvin was our salesman and he was the absolute best! Very nice, no pressure, and extremely helpful! Definitely would recommend coming to this dealership if you are looking for a new Kia!"
Matt in New York



Positive Reviews Mention These Topics Much More Often Than Negatives:

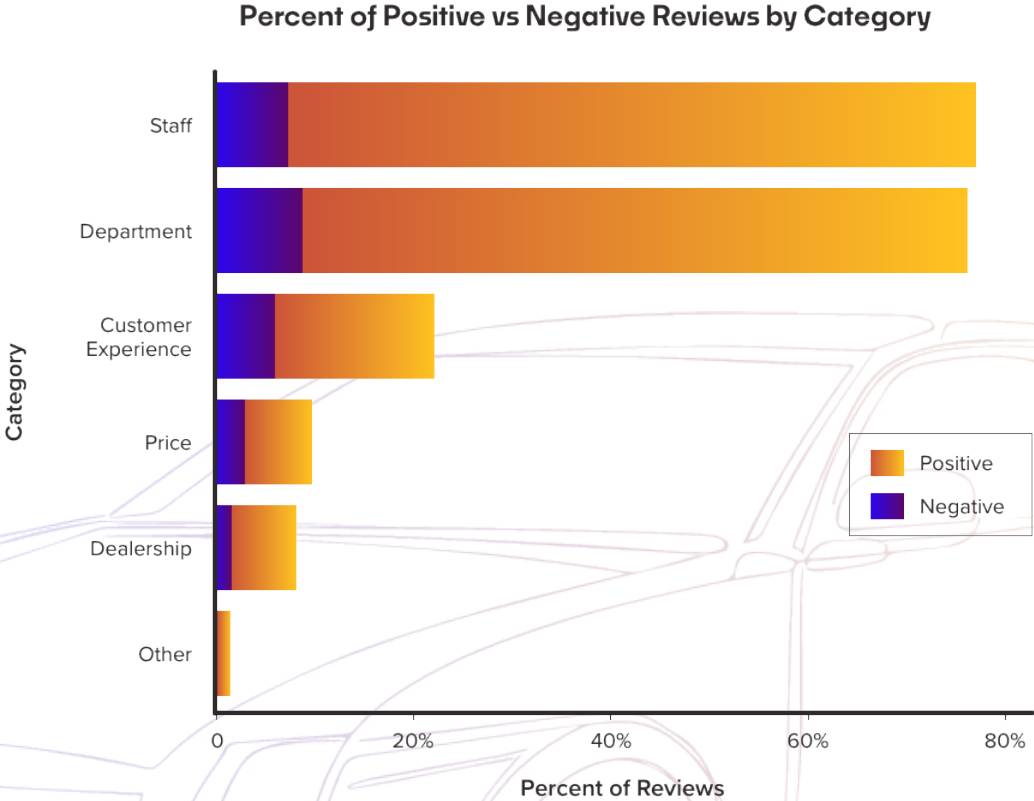
- Personnel:** 57% of positive reviews → 17% of negative reviews
- Helpfulness:** 30% of positive reviews → 4% of negative reviews
- Friendliness:** 22% of positive reviews → 2% of negative reviews
- Sales Department:** 45% of positive reviews → 24% of negative reviews

WHAT ARE HAPPY CUSTOMERS TALKING ABOUT?



Staff are mentioned in **8 out of 10** reviews, **7** of those are positive.

Category	Positive Percent	Negative Percent
Staff	69.40%	7.72%
Department	68.02%	8.98%
Customer Experience	15.65%	7.11%
Price	7.65%	3.64%
Dealership	7.85%	1.85%
Other	0.64%	0.17%



Personnel are Called Out by Name in 57% of Reviews.

We found that 57% of all reviews mention individual team members. The experience customers have with a specific staff member at a dealership is the most commonly mentioned category in Google reviews and has the leading influence on positive reviews.



'We had the absolute best experience at the Nissan dealership! Stephanie was the best salesperson we could have ever asked for! She was very knowledgeable and personable. She made us feel like a good friend and was very patient with our questions. The whole team made us feel comfortable. We will definitely recommend Central Nissan and Stephanie to anyone looking for a new or used car. And we will use them again when we are in need of another vehicle!'

Frances in Detroit

INVITE VS. AUTO INDUSTRY REPUTATION BENCHMARKS

Widewail Invite vs. Automotive Industry Benchmarks



2023 INVITE PERFORMANCE VS. AUTOMOTIVE BENCHMARKS REPUTATION BENCHMARKS & PERFORMANCE REPORT

Widewail's data science team analyzed review volume and ratings from over 16,000 new car dealerships — totaling over 1.6 million Google reviews from the first half of 2023.

What We Found:

- Invite Clients Generate **4.5x** More Reviews Monthly
- Invite clients generate **4.5x** more monthly reviews than the average dealership
- Invite clients are **225%** more likely to generate over 20 Google reviews per month



Invite Clients Get Higher Ratings

Invite clients are **33%** more likely to have a 4.5+ star rating

Rating	Invite	Auto
1	4.7%	7.3%
2	1.0%	1.4%
3	1.2%	1.5%
4	3.9%	4.0%
5	85.0%	85.7%

Invite clients have a **positive/negative split of 93%/7%**, while the industry benchmark is 90%/10%

Increasing Volume is The Path to Better Ratings

The Impact of Review Volume on Average Star Rating



Invite clients receive a **higher volume** of reviews and have **higher overall star ratings**.

Further, our research proves that more reviews is **positively correlated** with better ratings.

Auto Industry Benchmark: **4.44** → Average Google Star Rating → **4.67**

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Customers Value Staff That Are Helpful, Friendly and Professional.

Positive reviews about staff often call out personality-driven engagements such as helpfulness, friendliness and professionalism.



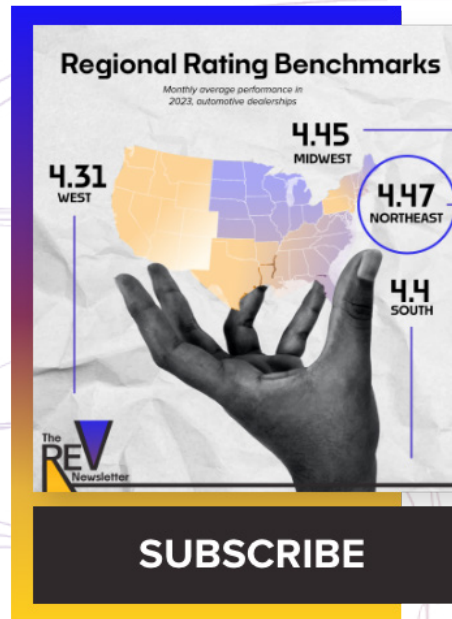
“Patrick, the salesperson who assisted me, was kind, professional and very helpful. He was very thorough in explaining things to me and making sure he answered all of my questions.”

Sam in Hartford

These Qualities Come Up in

22%

of All Tagged Topics.



Positive Experiences With Staff are the Most Predictive of a Positive Outcome.

We learned that staff has the most significant influence on the sentiment of a review. In contrast, price and dealership attributes (cleanliness, inventory, valet, loaner car, and trade-in) had negligible influence.

How You Should Interpret This

As an example, if a customer leaves a review detailing a positive experience with a staff member, the customer's overall rating will likely be positive.

Category Importance in Sentiment



Staff is 5x

more predictive of a positive outcome than pricing topics like cost, warranty and deals.

Staff is 12x

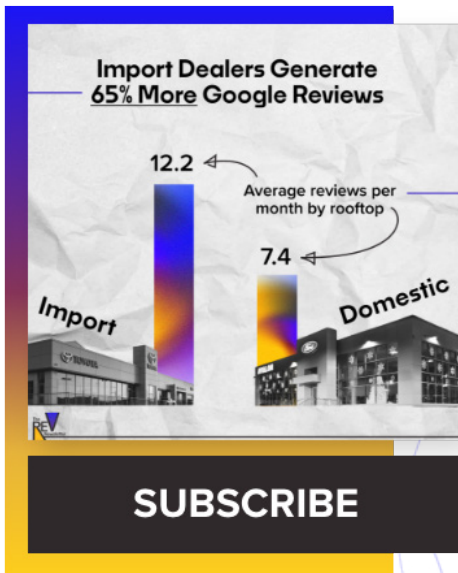
more predictive of a positive outcome than dealership topics, like inventory, loaner car or valet.



Think of Category Importance in Sentiment as a Collection of Flow Charts

If you're trying to decide whether to go for a walk or not, you check the weather first. If it's raining, then you don't go out. If it's not raining, then you check the temperature. If it's below 40 degrees, then you don't go out. Otherwise, you take a walk.

We calculate importance by looking at how far down the flow chart you must go before deciding the outcome of a review. If we know the review mentions staff, we don't have to go further down the flow chart before deciding on the overall rating. However, if a review mentions a topic in the dealership category, we still need more information before predicting the overall rating.



A Note from Our Lead Data Scientist

“We determined the most important categories by calculating the Mean Decrease Impurity (MDI). Knowing the MDI of each category helps us understand which aspects of the dealership experience have the most influence in determining the final rating of a review. The higher the MDI, the greater the influence on each category's review outcome.”

Mitch Joseph

Lead Data Scientist





Dealers using
Widewail generate
more reviews with
higher ratings.

Request A Demo

NATIONAL
DEALERSHIP
BENCHMARK

9.6

42

AVERAGE MONTHLY
REVIEWS - WIDEWAIL
DEALER CLIENTS



How to Maximize Positive Reviews

Quality Personnel and Effective Communication Systems are Likely to Produce Better Reviews.

What to invest in:

- » Hiring and training, particularly in the sales department. When hiring, test for friendliness, helpfulness and professionalism.
- » Tools and training that facilitate productive communication - especially in the Service department.

Monitor and act on rising mentions in:

- » Communication
- » Management
- » Wait times
- » Honesty
- » Pricing

These topics should remain low in positive reviews. A spike in mentions indicates a problem.

Investments that likely will not influence positive reviews:

- » Valet program
- » Loaner car program
- » Offering more deals

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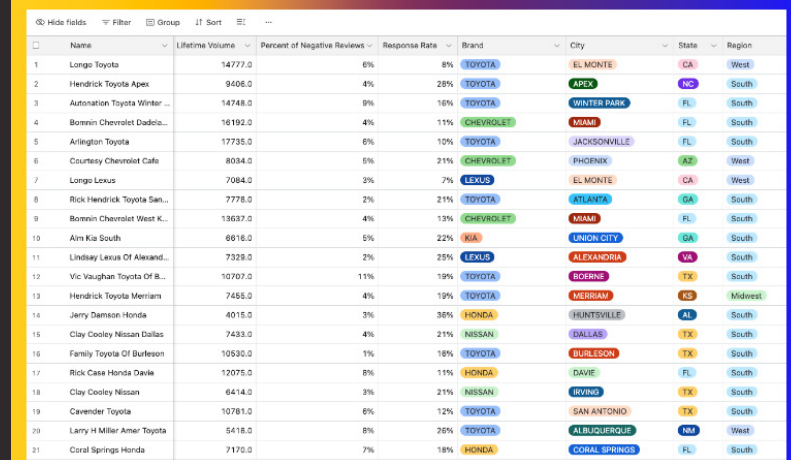
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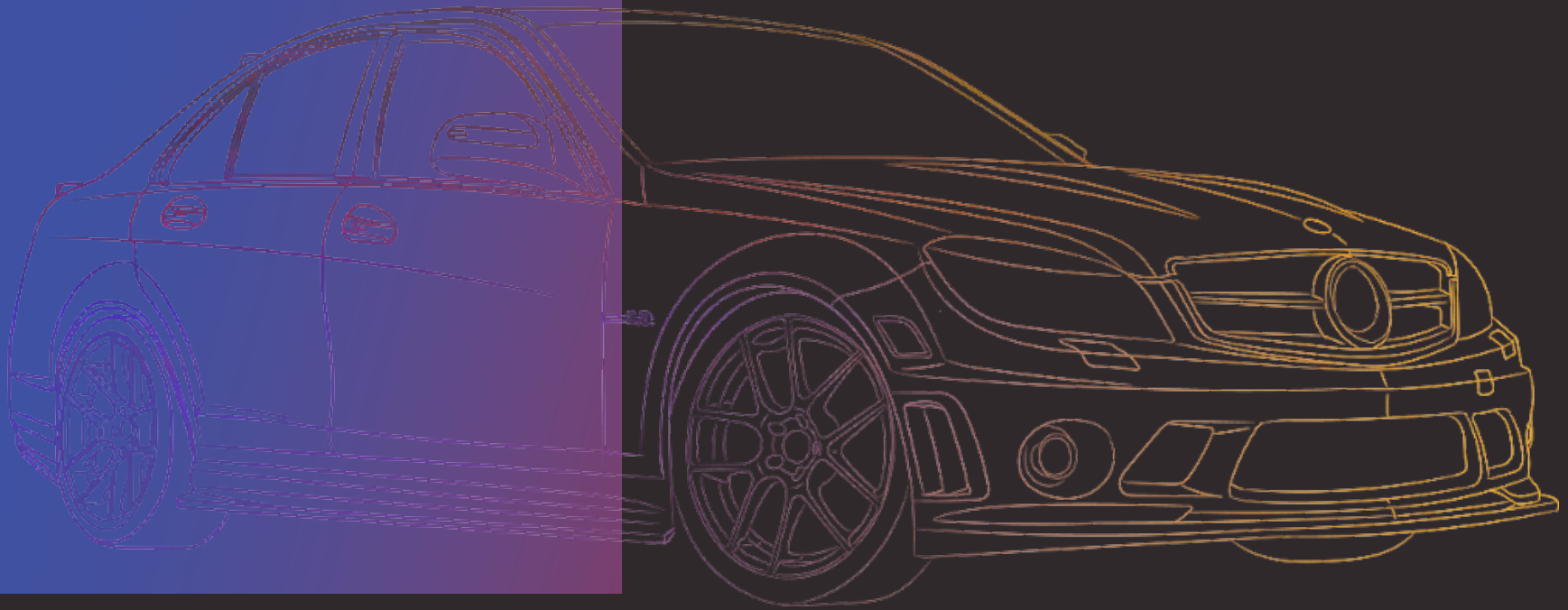
Explore Now



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Lindsay Lexus Of Alessand...	7339.0	2%	25%	LEXUS	ALEXANDRIA	VA	South
Vic Vaughan Toyota Of B...	10707.0	11%	19%	TOYOTA	BOERNE	TX	South
Hendrick Toyota Merriam	7455.0	4%	19%	TOYOTA	MERRIAM	KS	Midwest
Jerry Damsen Honda	4015.0	3%	36%	HONDA	HUNTSVILLE	AL	South
Clay Cooley Nissan Dallas	7433.0	4%	21%	NISSAN	DALLAS	TX	South
Family Toyota Of Burleson	10530.0	1%	16%	TOYOTA	BURLESON	TX	South
Rick Case Honda Davie	12075.0	8%	11%	HONDA	DAVIE	FL	South
Clay Cooley Nissan	6414.0	3%	21%	NISSAN	IRVING	TX	South
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Larry H Miller Amer Toyota	5418.0	8%	26%	TOYOTA	ALBUQUERQUE	NM	West
Coral Springs Honda	7170.0	7%	18%	HONDA	CORAL SPRINGS	FL	South

Customer Sentiment Trends:

What Are Unhappy Customers Talking About?



Anatomy of a Negative Review

Service Departments Lead in Generating Negative Reviews:

Leading indicators of negativity are communication, car maintenance, price, and the service department generally.

Negative Reviews Most Often Mention:

Poor communication + Service department + Unsatisfactory or expensive repairs + Long Wait Times + Price Surprises

Price mentions are 4.7x More Common in Negative

Price concerns are almost five times more common among unhappy customers than happy customers, likely because of a lack of predictability in costs associated with the service department. While dealerships advertise the sale price of a vehicle publicly, the cost of a service is unique to each situation, and often, it is communicated inconsistently by different team members throughout the process.

Negative Reviews are Longer, on Average

Positives averaged just 33 words, while negatives averaged 100 words. We found that negative reviews have a higher density of topic-specific mentions, explaining in greater detail the problems encountered.



“Coil & engine light came on. Went to dealership. Held my car for 6 days. All They did was reset my car and charged \$150 for diagnosing fee. One hour down the road car breaks down. Loose time, loose money, no accountability. Useless management didn't return my call.

Matt in New York

Price

Wait Time

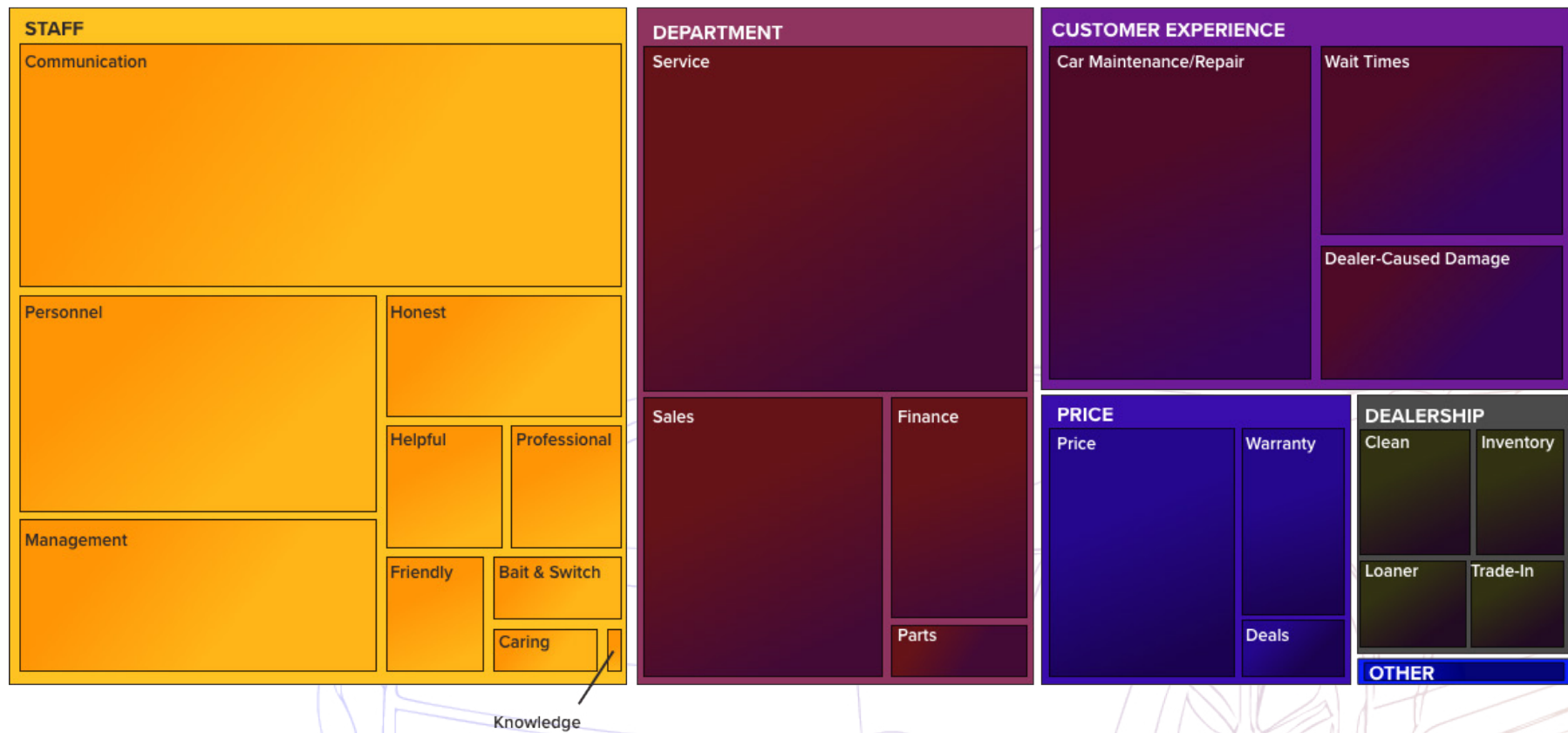
Unsatisfactory Repairs



Negative Reviews Mention These Topics Much More Often Than Positives:

Communication: 37% of negatives → 11% of positives
Car Maintenance/Repair: 33% of negatives → 12% of positives
Wait Times: 25% of negatives → 8% of positives
Price/Cost: 20.7% of negatives - 4.37% of positives

WHAT ARE UNHAPPY CUSTOMERS TALKING ABOUT?



Poor Communication is the #1 Issue for Service.

Negative service reviews focus on surprise and frustration caused by scant communication, rather than on poor execution of the service task.

Communication is a leading subcategory, mentioned in 37% of negative reviews. Negative reviews also name wait time as an issue, mentioning it 3.1x more often in negatives than in positive reviews.



“My truck was there for about 27 days, and not once did I get an update besides the one I got when I was provided with a loaner car. I was told that I needed one thing that would take 2-3 days.”

Andy in Houston



“Solid communication throughout sending me photos and videos, as well as texts letting me know what was going on. 10/10 Recommend Ford of Clermont and do yourselves a favor and ask for Dustin!”

Brandon in Florida



How to Minimize Negative Reviews

Quality Communication Systems Likely to Minimize Negative Reviews

What to invest in:

- » Service-Level Agreements (SLAs) around communication. Focus on effectively communicating wait times and setting customer expectations, particularly pricing.
- » Technology or processes to facilitate real-time service updates, including photos and videos.
- » Technology that unifies pricing information across all teams at a dealership, supporting reliable communication.

Monitor and act on rising mentions in:

- » Sales
- » Management
- » Wait times
- » Pricing
- » Dealer Caused Damage

These topics should remain low in negative reviews. A spike in mentions indicates a problem.

Investments that likely will not influence positive reviews:

- » Making significant changes to a loaner and valet program
- » Removing deals on service visits or new car sales

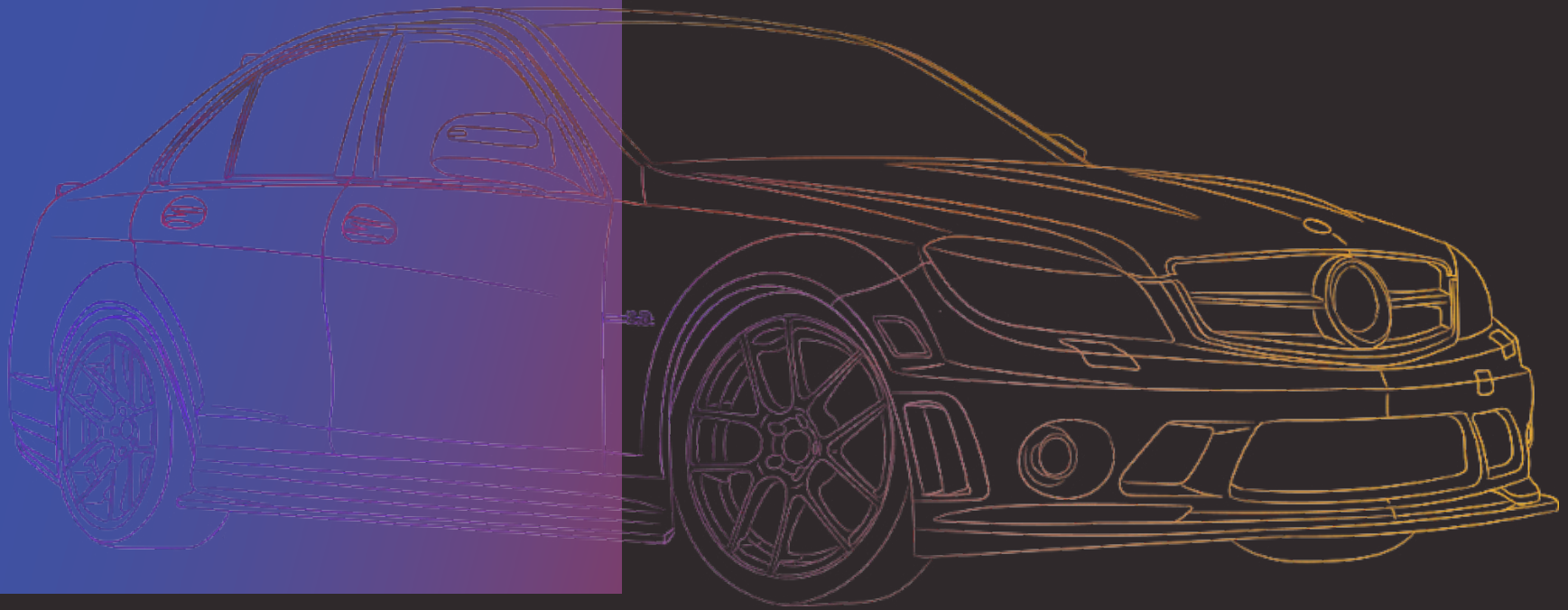
INVITE VS. AUTO INDUSTRY REPUTATION BENCHMARKS

Widewail Invite vs. Automotive
Industry Benchmarks



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How Consumers Think About Price



Despite Rising Car Prices, Pricing Meets Customer Expectations in 2023. Service Pricing Slightly Problematic.

The average cost of a new vehicle is high—\$48,451—up [61%](#) since 2012. And yet Widewail's data finds that customers don't mention pricing as much as one might expect.

Customers mention price in 4.4% of positive reviews, but 20.7% of negative reviews.

When looking at the frequency of pricing mentions in positive reviews compared to negative reviews, we find pricing is 4.7 times as common in negative reviews as in positive reviews.

In positive reviews, the limited number of pricing mentions suggests pricing meets consumer expectations. In the sales department, buyers expect to spend a lot of money on a car purchase and often have an anticipated price in mind before arriving on the lot.

In negative reviews, pricing contributes to the negative experience more often. This is due, in part, to the fact that negative mentions of price occur more frequently in service reviews than sales reviews.

Pricing mentions are **4.7x more common** in negative reviews than positive reviews.

Negative



Positive



Customers Mention Pricing Topics in the Service Department More Often in Negative Reviews Than in Positive Reviews

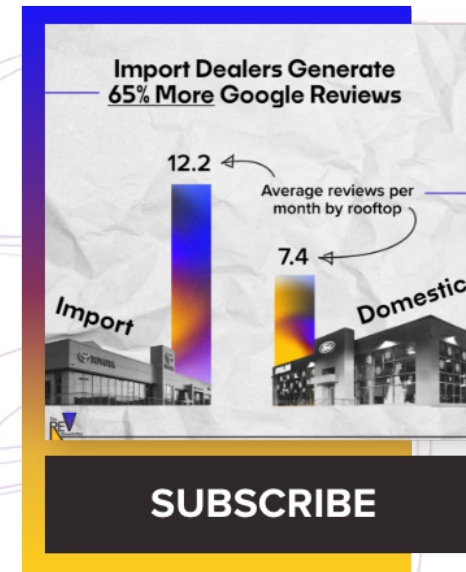
Negative mentions of price are more frequent in service reviews than in sales reviews. With service pricing less widely understood and promoted publicly, pricing in the context of service is catching consumers off guard and is generating negative reviews.

Mentions of Personnel Occur 13x More in Positive Reviews Than Price/cost

Given the wide availability of industry pricing data, price is less of a differentiator among consumers. Instead, consumers differentiate between dealerships by their experiences with staff. Mentions of personnel occur in 13 times more positive reviews than the price/cost topic. That said, it is reasonable to imagine that if a dealer significantly raised prices, mentions would likely increase.

Takeaway

For sales, pricing transparency appears to work for customers. In service, where pricing is not as transparent without deliberate action from the dealership team, avoid surprises by setting clear pricing expectations upfront and maintaining real-time communication for service customers.



Deals Don't Make or Break the Customer Experience

Deals Neither Make Nor Break the Customer Experience.

While some dealerships offer great deals or regular promotions, customers rarely mention deals in reviews. Customers bring up deals in 3.8% of positive reviews and just 2.1% of negative reviews.

While deals don't appear to have a significant positive or negative impact on the customer experience, it is worth considering how much effort your dealership puts into special offers considering their limited impact on public perception of your dealership's customer experience.

Customers bring up deals in 3.8% of positive reviews and just 2.1% of negative reviews.

Dealers Using
Widewail Generate

337% More

Reviews Compared to
Industry Benchmarks

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Google Review Benchmarks For Dealerships

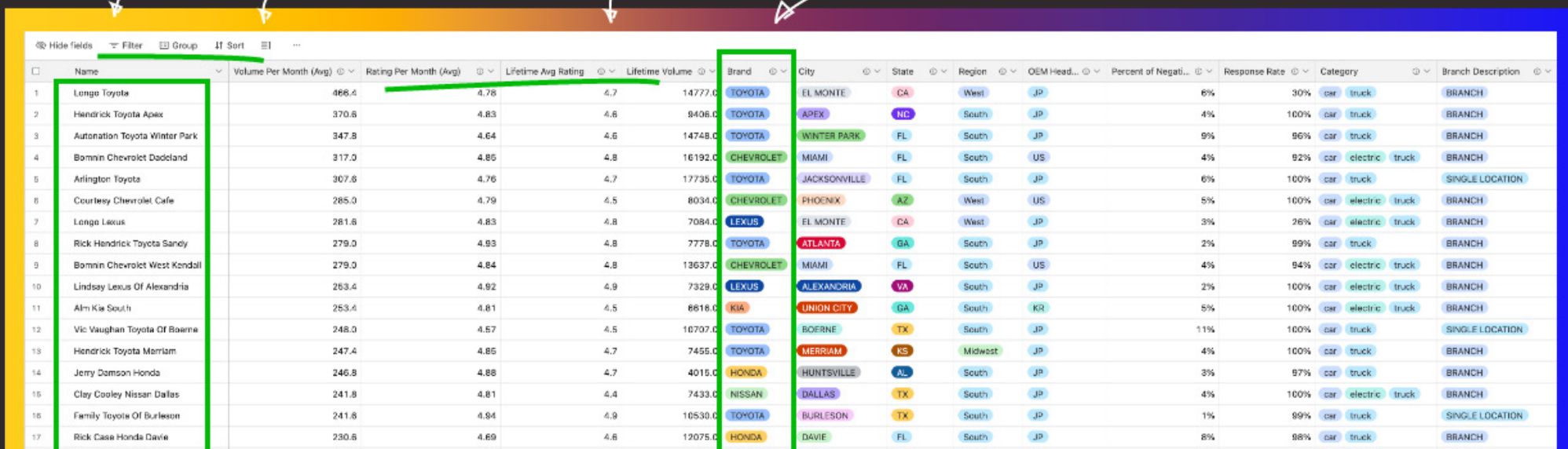
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16,000+ Dealerships

Customize Like it's Your Spreadsheet

Detailed Reputation Data

OEMs

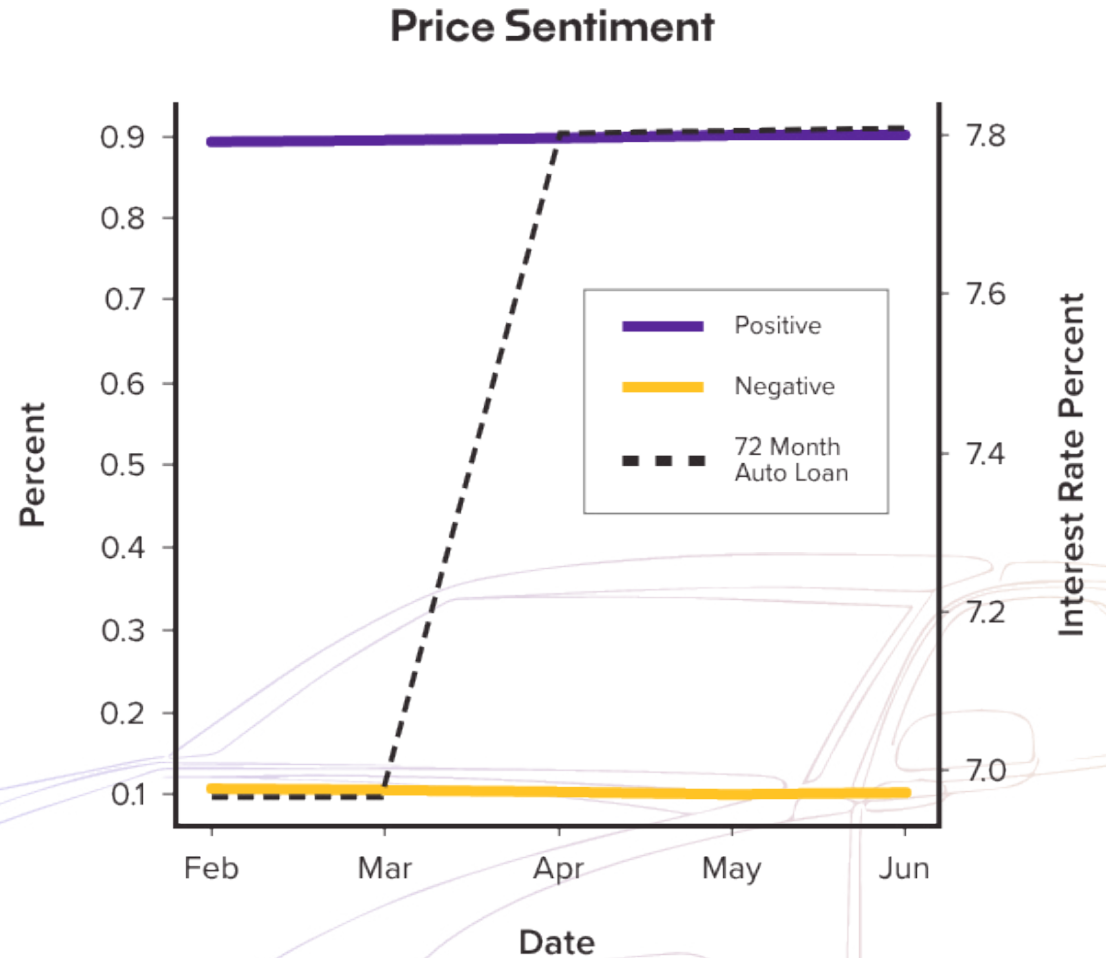


Name	Volume Per Month (Avg)	Rating Per Month (Avg)	Lifetime Avg Rating	Lifetime Volume	Brand	City	State	Region	OEM Head...	Percent of Negati...	Response Rate	Category	Branch Description
Longo Toyota	466.4	4.78	4.7	14777.0	TOYOTA	EL MONTE	CA	West	JP	6%	30%	car truck	BRANCH
Hendrick Toyota Apex	370.6	4.83	4.6	8406.0	TOYOTA	APEX	NC	South	JP	4%	100%	car truck	BRANCH
Automation Toyota Winter Park	347.8	4.64	4.6	14748.0	TOYOTA	WINTER PARK	FL	South	JP	9%	96%	car truck	BRANCH
Bomnin Chevrolet Doddsland	317.0	4.85	4.8	16192.0	CHEVROLET	MIAMI	FL	South	US	4%	92%	car electric truck	BRANCH
Arlington Toyota	307.6	4.76	4.7	17735.0	TOYOTA	JACKSONVILLE	FL	South	JP	6%	100%	car truck	SINGLE LOCATION
Courtesy Chevrolet Cafe	285.0	4.79	4.5	8034.0	CHEVROLET	PHOENIX	AZ	West	US	5%	100%	car electric truck	BRANCH
Longo Lexus	281.6	4.83	4.8	7084.0	LEXUS	EL MONTE	CA	West	JP	3%	26%	car electric truck	BRANCH
Rick Hendrick Toyota Sandy	279.0	4.93	4.8	7778.0	TOYOTA	ATLANTA	GA	South	JP	2%	99%	car truck	BRANCH
Bomnin Chevrolet West Kendall	279.0	4.84	4.8	13637.0	CHEVROLET	MIAMI	FL	South	US	4%	94%	car electric truck	BRANCH
Lindsay Lexus Of Alexandria	263.4	4.92	4.9	7329.0	LEXUS	ALEXANDRIA	VA	South	JP	2%	100%	car electric truck	BRANCH
Alm Kia South	253.4	4.81	4.5	8618.0	KIA	UNION CITY	GA	South	KR	5%	100%	car electric truck	BRANCH
Vic Vaughan Toyota Of Boerne	248.0	4.57	4.5	10707.0	TOYOTA	BOERNE	TX	South	JP	11%	100%	car truck	SINGLE LOCATION
Hendrick Toyota Merriam	247.4	4.85	4.7	7455.0	TOYOTA	MERRIAM	KS	Midwest	JP	4%	100%	car truck	BRANCH
Jerry Damon Honda	246.8	4.88	4.7	4015.0	HONDA	HUNTSVILLE	AL	South	JP	3%	97%	car truck	BRANCH
Clay Cooley Nissan Dallas	241.8	4.81	4.4	7433.0	NISSAN	DALLAS	TX	South	JP	4%	100%	car electric truck	BRANCH
Family Toyota Of Burleson	241.6	4.84	4.9	10530.0	TOYOTA	BURLESON	TX	South	JP	1%	89%	car truck	SINGLE LOCATION
Rick Case Honda Davie	230.6	4.69	4.6	12075.0	HONDA	DAVIE	FL	South	JP	8%	98%	car truck	BRANCH

Q2 Interest Rate Hikes Did Not Impact Negative Reviews

Widewail finds no material impact on consumer sentiment by the Q2 2023 rate increase for 72-month auto loans. The rate jumped from 6.91% in Q1 to 7.8% in Q2, 2023.

This chart shows the percentage of positive (4 and 5-stars) and negative reviews (1, 2, and 3-stars) over time and highlights the point at which the Federal Reserve raised consumer finance rates in the spring of 2023. We see no spike in negative or positive reviews after the Q2 rate increase, suggesting this had no apparent impact on sentiment.



Price is Mentioned More Often in Specific Service Reviews

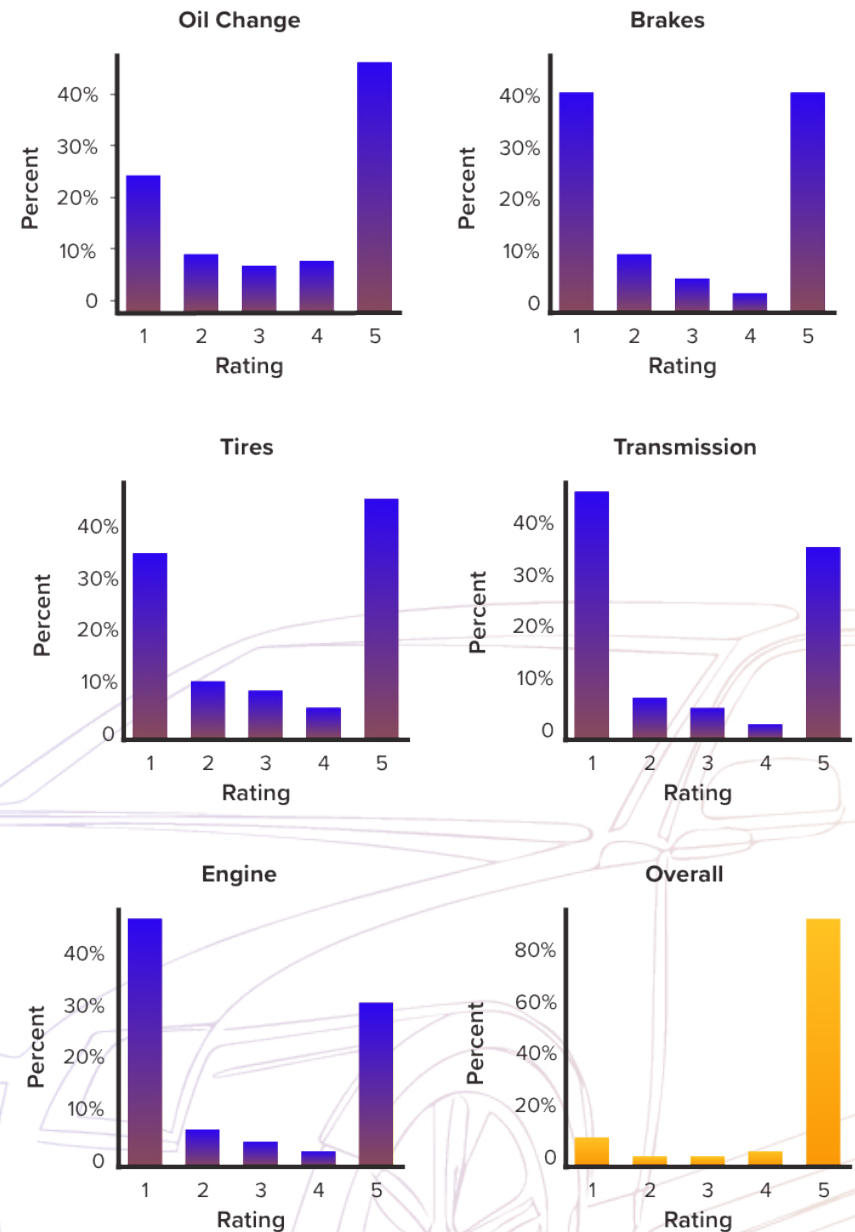
We detailed the sentiment and ratings of reviews about oil changes, brake repairs and transmission repairs. Comparing service-specific rating distributions to the industry average rating distribution makes it clear that reviews about specific service types are skewed negative

More 1-Star Reviews

Compared to the general distribution of reviews, shown here in yellow, the high volume of 1-star reviews jumps out in specific service-type charts.

We know that negative reviews tend to highlight particular details of the onsite experience more often, suggesting that positive reviews from service customers don't mention the specific service they received, focusing instead on common topics like personnel and communication, thereby skewing reviews that mention a particular type of service as highly negative.

Rating Distribution by Service Topic Mention



Price is Mentioned More Often in Specific Service Reviews

Pricing is Mentioned 46% More Often in Brake Reviews than General Negative Reviews

While customers mention pricing in 20.7% of negative reviews, price is mentioned even more often in reviews about a specific service experience.

Dealers Need Enhanced Communication for Higher-Cost Services

As the average price of a type of repair increases, pricing is mentioned more often and is a more significant concern. While oil changes typically cost under \$100, [the cost to repair a transmission](#) ranges from \$2,500 to \$5,000.

While logical, it is important to understand that the risk to your reputation increases substantially from a non-service visit like buying a car to a high-cost service visit such as transmission or brake service. The stakes to your reputation are much higher, and communication plans must be ready.

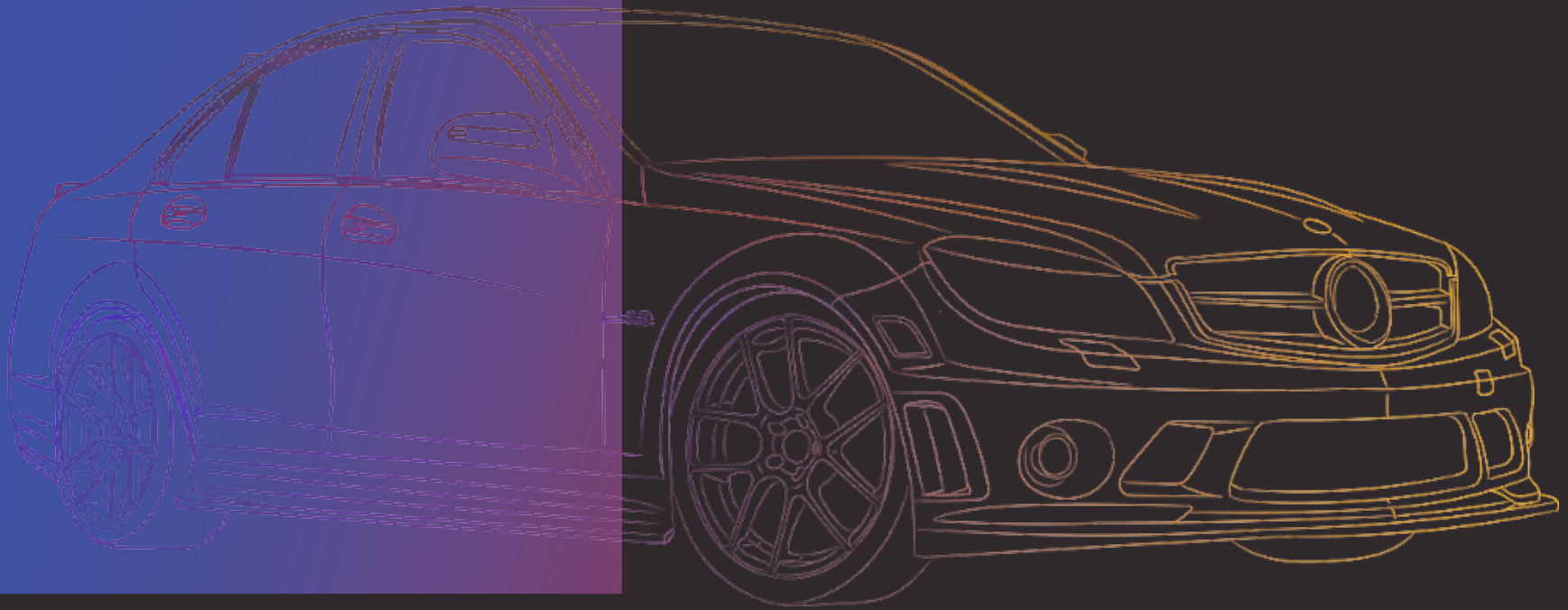
Service	Percent of Reviews that Mention Pricing
Oil Change	25.4% - this represents a 22.8% increase compared to general negative reviews
Transmission	29.9% - representing a 44.8% increase
Brakes	30.4% - representing a 46.7% increase

Pricing is Mentioned 46% More Often in Brake Reviews than General Negative Reviews



EV Sentiment Trends:

Direct-to-Consumer EV vs. Dealership-Sold EV



Overview

This section uncovers sentiment trends among electric vehicle customers. We compare two unique groups: locations that sell and service EVs directly to the consumer (Tesla and Rivian brands) and dealerships that sell and service EVs at dealerships.

We'll analyze:

1. How electric vehicle customers feel about the buying and servicing experience.
2. How the unique direct-to-consumer model used by some EV manufacturers like Tesla and Rivian impacts the customer experience.
3. How the direct-to-consumer EV experience compares to the experience of dealership-sold EV customers and gas-powered vehicle buyers.

AUTOMOTIVE REPUTATION INDEX

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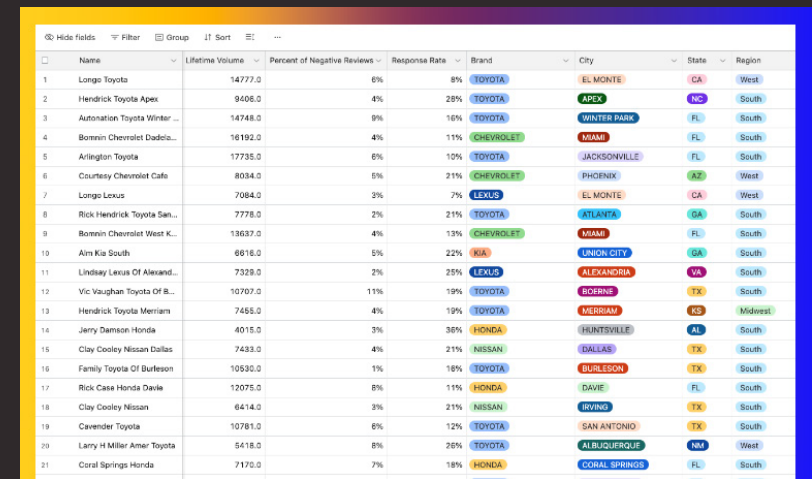
Dive Into Individual Dealership Ratings in the Automotive Reputation Index

1.6M Google reviews

16,000+ new car dealers

17 reputation, business & geographic data dimensions

Explore Now



Name	Lifetime Volume	Percent of Negative Reviews	Response Rate	Brand	City	State	Region
1 Longo Toyota	14777.0	6%	8%	TOYOTA	EL MONTE	CA	West
2 Hendrick Toyota Apex	9406.0	4%	28%	TOYOTA	APEX	NC	South
3 Automation Toyota Winter ...	14748.0	9%	16%	TOYOTA	WINTER PARK	FL	South
4 Borsini Chevrolet Dade...	16192.0	4%	11%	CHEVROLET	MIAMI	FL	South
5 Arlington Toyota	17735.0	6%	10%	TOYOTA	JACKSONVILLE	FL	South
6 Courtesy Chevrolet Cato	8034.0	5%	21%	CHEVROLET	PHOENIX	AZ	West
7 Longo Lexus	7084.0	3%	7%	LEXUS	EL MONTE	CA	West
8 Rick Hendrick Toyota San...	7778.0	2%	21%	TOYOTA	ATLANTA	GA	South
9 Borsini Chevrolet West K...	13637.0	4%	13%	CHEVROLET	MIAMI	FL	South
10 Airo Kia South	6616.0	5%	22%	KIA	UNION CITY	GA	South
11 Lindsay Lexus Of Alexand...	7329.0	2%	25%	LEXUS	ALEXANDRIA	VA	South
12 Vic Vaughan Toyota Of B...	10707.0	11%	19%	TOYOTA	ROBERN	TX	South
13 Hendrick Toyota Meriam	7455.0	4%	19%	TOYOTA	MERRIAM	KS	Midwest
14 Jerry Damson Honda	4015.0	3%	35%	HONDA	HINTSVILLE	AL	South
15 Clay Cooley Nissan Dallas	7433.0	4%	21%	NISSAN	DALLAS	TX	South
16 Family Toyota Of Burleson	10530.0	1%	16%	TOYOTA	BURLESON	TX	South
17 Rick Casa Honda Davie	12075.0	8%	11%	HONDA	DAVIE	FL	South
18 Clay Cooley Nissan	6414.0	3%	21%	NISSAN	IRVING	TX	South
19 Cavender Toyota	10781.0	6%	12%	TOYOTA	SAN ANTONIO	TX	South
20 Larry H Miller Amer Toyota	5418.0	8%	26%	TOYOTA	ALBUQUERQUE	NM	West
21 Coral Springs Honda	7170.0	7%	18%	HONDA	CORAL SPRINGS	FL	South



Definitions

EVs — Electric vehicles, including battery-powered electric vehicles and plug-in hybrids.

DTC EVs — Electric vehicles sold directly to the consumer. DTC brands offer repair services at a brand-specific service center or a mobile appointment at the owner's home. We looked exclusively at Tesla and Rivian.

Dealership-sold EVs — Electric vehicles sold and serviced at a traditional dealership. These vehicles tend to be made by brands that traditionally manufacture gas-powered vehicles (Ford, Volkswagen, Toyota, etc.).

Method

Our DTC-EV analysis builds upon 8,360 Google reviews from 204 Tesla stores and 30 Rivian service centers (from January to October 2023). We sampled 2,816 dealership-sold EV reviews from 1,816 locations to study dealer-sold EVs. We selected these reviews because they mentioned specific EV vehicles.



EV Ratings Are Lower Than Auto Industry Averages

Dealership-Sold EVs and DTC EVs Are Highly-Rated But Below Industry Benchmarks

Dealership-Sold EV reviews trend slightly below the industry average. The average rating of reviews mentioning EVs was 4.30 stars, lower than the industry benchmark of 4.41. Lowest of all is Tesla, its locations had an average rating of 3.89.

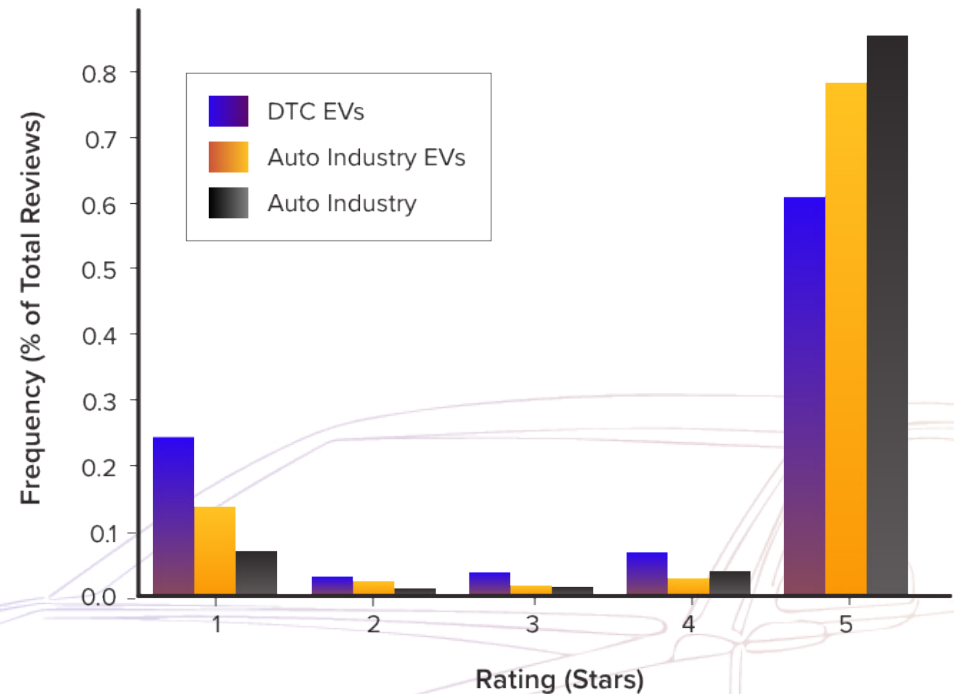
EV Customers Give More 1-Star Reviews Than Customers of Traditional Dealerships

25% of the reviews for DTC EV locations had a 1-star rating, strikingly higher than the automotive industry benchmark of 7% percent.

14% of dealer-sold EV reviews have a 1-star rating. While this is much lower than DTC EVs, it is still two times more 1-star reviews than average.

Tesla locations average a 3.89 rating.
The national benchmark is 4.41.

Rating Distribution

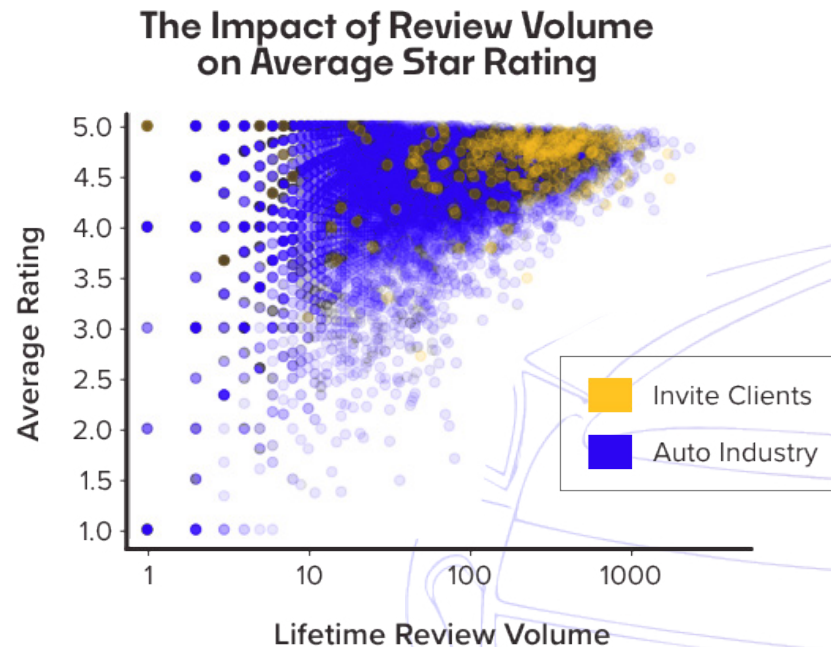


Lower Ratings Stem From Lower Review Volume

Downward Pressure

A low review volume can help us understand why EV stores have much lower ratings than the industry average. Review volume and average star ratings are positively correlated, as shown in the scatterplot below.

This positive correlation means that ratings often skew lower for lower-volume dealerships. With fewer EV customers in the market, EV-related review scores have a slight built-in negative bias.



The Case of Tesla

Using Tesla as an example, we find its monthly review volume is tiny at just 2.6 monthly reviews per location, far shy of 9.6, the industry average.

Our research supports the correlation between customer engagement in reviews and positive outcomes. Dealers receiving 30+ reviews a month average a 4.62-star rating, while those between 2-5 reviews average just a 4.2-star rating.

To understand why EV ratings skew negatively, we performed a topic and sentiment analysis of all EV reviews to explore the EV customer experience further.

Tesla averages 2.6 monthly reviews per location, far behind the national average of 9.6.



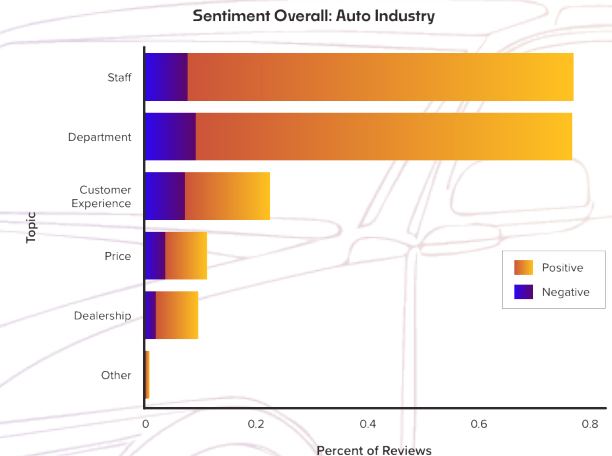
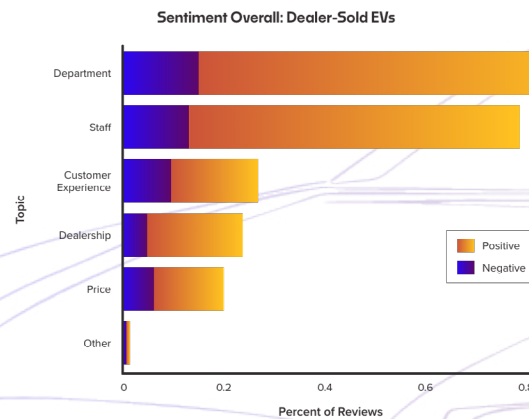
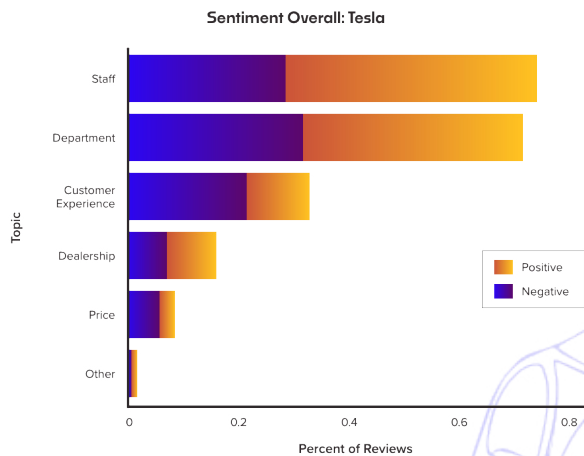
EV Sentiment Overview

Tesla Sentiment is Strikingly More Negative

Breaking down each category by positive and negative reviews reveals how much more negative Tesla reviews are compared to dealer-sold EV and general auto industry reviews. Low review volume, an atypical sales process and service-reliant reviews are likely part of the reason for this negativity.

Over 50% of Tesla Reviews that Discuss Customer Experience are Negative

Notably, 57% of reviews that mention the customer experience for DTC EVs are negative. Customer experience topics include the outcome of repairs, vehicle damage caused by service technicians and wait times. This is a high proportion of negatives, especially compared to the 31% of dealership-sold EV reviews and 28.7% for the remainder of the industry.



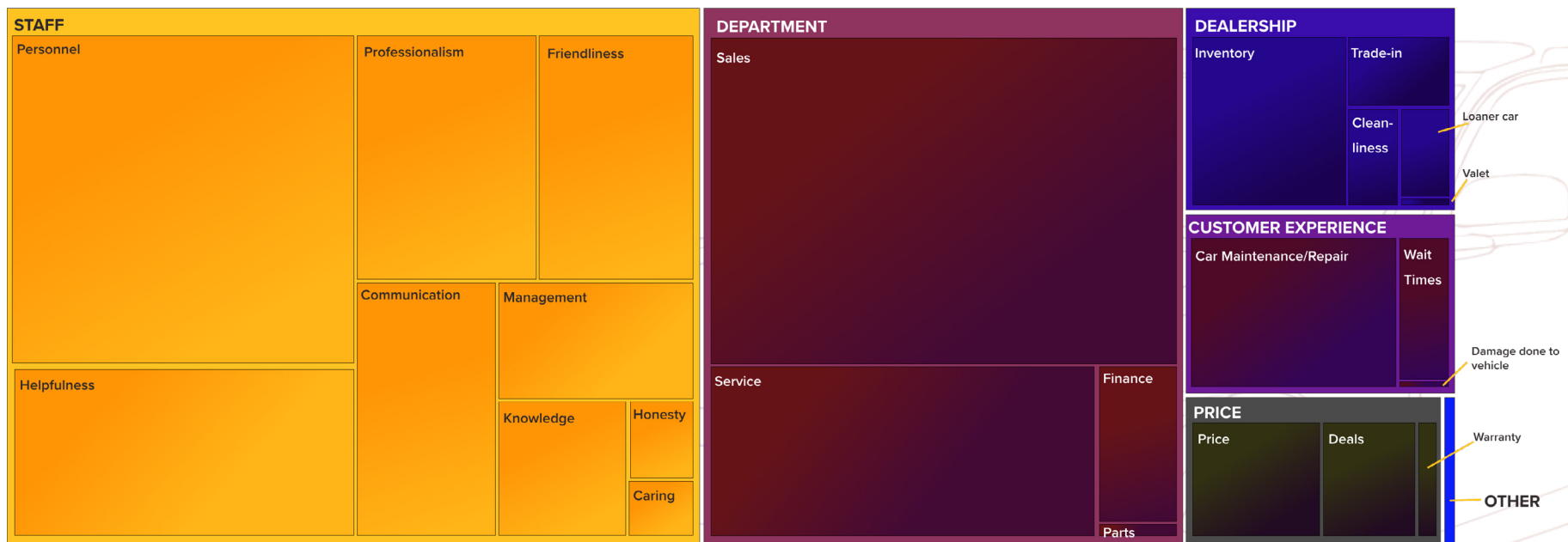
What are Happy Customers Talking About? EV vs. Auto Industry

Comparing the tree maps from EV dealers to the auto industry as a whole, there are a few key differences in what is being mentioned across customer reviews.

Positive EV Reviews Most Often Mention:

Name of a team member + Sales & Service department + Inventory + Car Maintenance

DEALER-SOLD EVS: WHAT ARE HAPPY CUSTOMERS TALKING ABOUT?



What are Happy Customers Talking About? EV vs. Auto Industry

Communication Facilitates a Successful DTC Service Experience

11% of DTC-EV reviews complement the team's communication. Coming into a service center for service isn't necessarily the norm for DTC-EV customers, as many appointments are completed via mobile service. However, when a DTC-EV customer visits in person for service, it is clear that communication is important to them.

EV Customers Rarely Mention Price

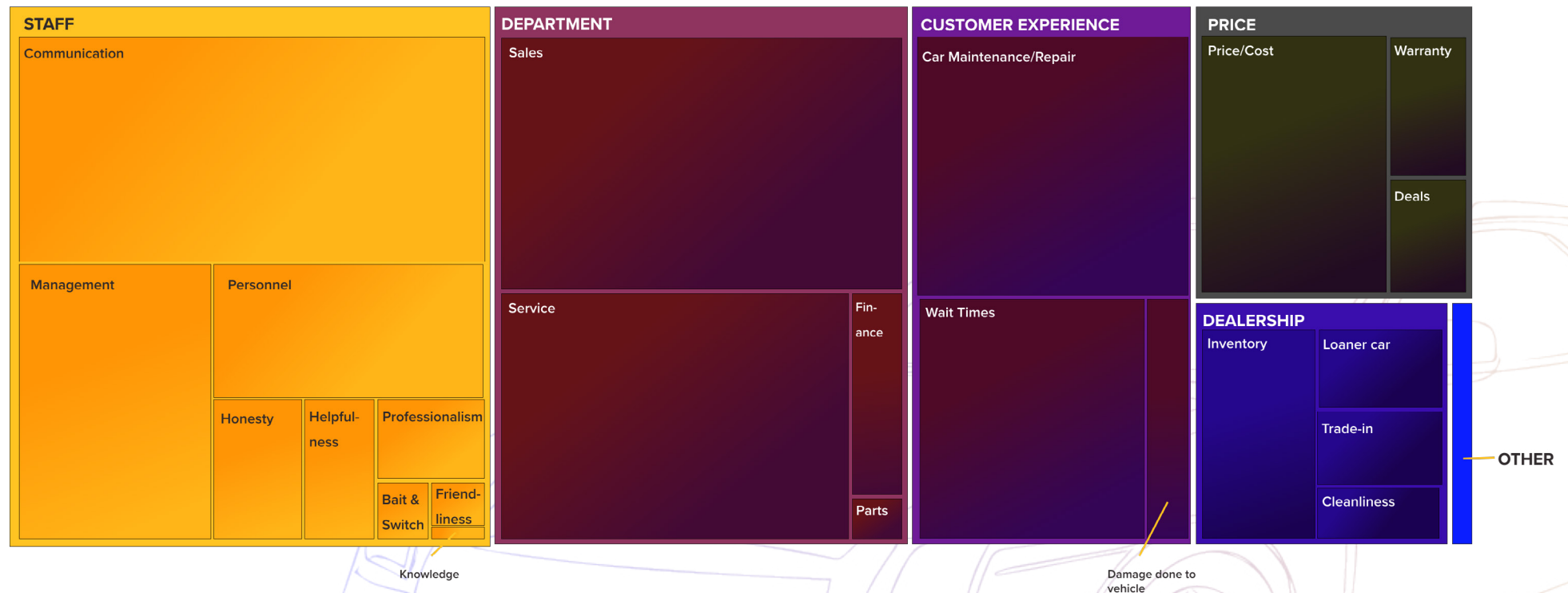
It is well-known that EVs are expensive vehicles, but happy customers shy away from price mentions. In negative, dealer-sold EV reviews, price mentions comprise 3% of total mentions, while price mentions constitute 8% of total mentions in the general auto industry. Likely, this means EV customers did their research and knew what to expect.



What are Unhappy Customers Talking About? EV vs. Auto Industry

EV customers tend to be unhappy for similar reasons instead of the average auto industry customer: poor staff communication and negative experiences with the service department.

DEALER-SOLD EVS: WHAT ARE UNHAPPY CUSTOMERS TALKING ABOUT?

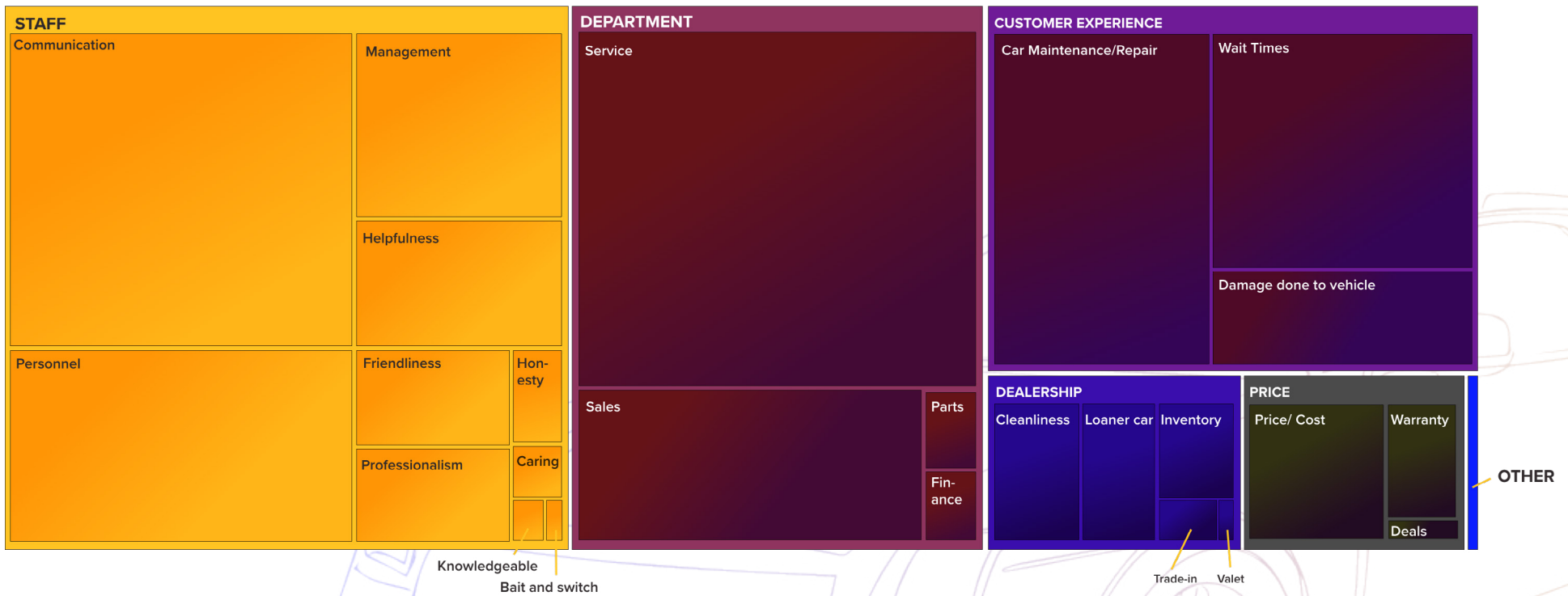


What are Unhappy Customers Talking About? EV vs. Auto Industry

Negative EV Reviews Most Often Mention:

Poor communication + Sales & Service departments + Price + Repairs/Wait times

TESLA: WHAT ARE UNHAPPY CUSTOMERS TALKING ABOUT?



What are Unhappy Customers Talking About? EV vs. Auto Industry

Individual Personnel Are Mentioned 50% More in Negative EV Reviews Than in Negative Auto Industry Reviews.

There are more personnel mentions in negative EV reviews than in general negative auto reviews. One-on-one interactions play a significant role in the buying and servicing experience. The fact that personnel are being called out more often in negative EV reviews suggests that staff assisting EV customers need improvement in the customer service realm.

Inventory is Mentioned More at Dealer-sold EV Locations.

In negative reviews, dealer-sold EV customers mention inventory in 12% of reviews, while inventory only comes up in 3.6% of DTC EV reviews. While dealerships are concerned with stocking the correct number of EV vehicles on the lot, DTC EV makers don't have an on-site inventory in the same way. DTC EV showrooms can concentrate on showing off models without needing to stock enough (or too many) vehicles for interested buyers.

For Dealer-sold EV Locations, Sales Departments Get More Negative Reviews Than Service.

Unlike the overall auto industry, where service departments receive a majority of negative reviews, for dealer-sold EV locations, we see a greater proportion of negative sales reviews compared to service. Communication, management and pricing are three of the most commonly discussed topics in dealer-sold EV reviews. This suggests that sales departments need to improve the customer experience for EV buyers.

Dealers Using
Widetail Generate
337% More
Reviews Compared to
Industry Benchmarks

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Tesla Spotlight

Intro and Method

In this section, we look exclusively at reviews from direct-to-consumer EV seller Tesla. We analyzed 8,009 Google reviews from 204 Tesla locations from January to October 2023.

As the direct-to-consumer sales model is unique in automotive, we aimed to determine how the DTC model changes the customer experience and how it compares to buyers of mass-market EVs and gas-powered vehicles.

AUTOMOTIVE REPUTATION INDEX

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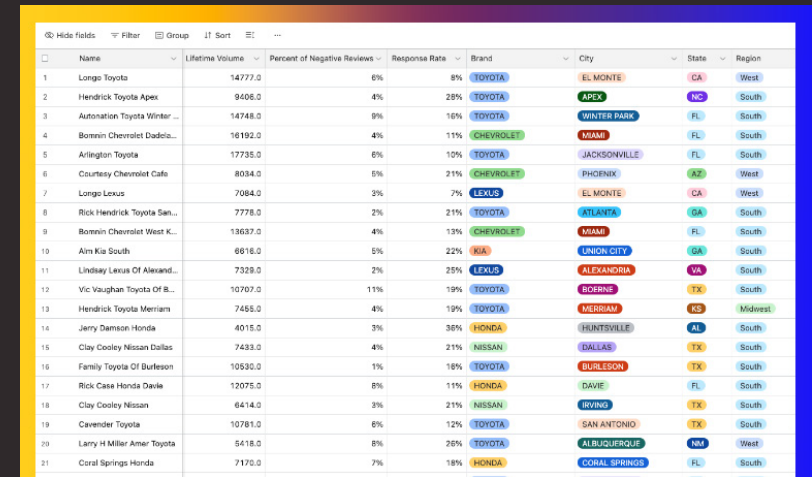
Dive Into Individual Dealership Ratings in the Automotive Reputation Index

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16,000+ new car dealers

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Explore Now



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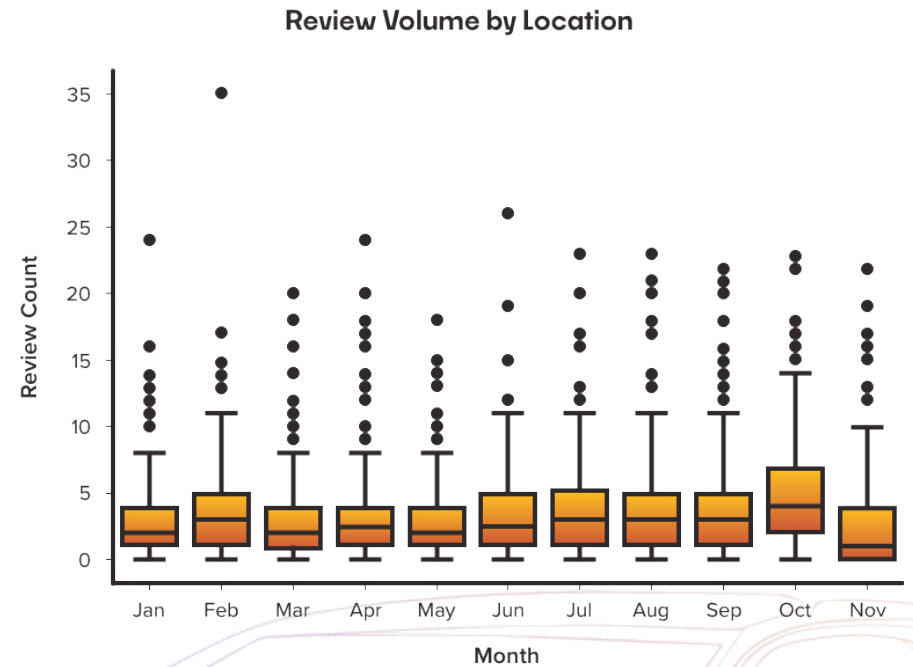
Review Volume By Location

Tesla Locations Get Very Few Reviews

Tesla averages just 2.6 reviews per location each month, less than half the industry benchmark and 14 times below the leading 40% of dealers. Low volume depresses ratings.

Month-to-month Review Volume is Consistently Low

The chart above demonstrates the consistency month-over-month in low review volume for Tesla locations. Over the ten months, only 99 locations received more than 30 reviews. On the other hand, 29% of traditional auto dealers consistently receive 20+ reviews every month.



Tesla averages just 2.6 reviews monthly per location, less than half the industry benchmark

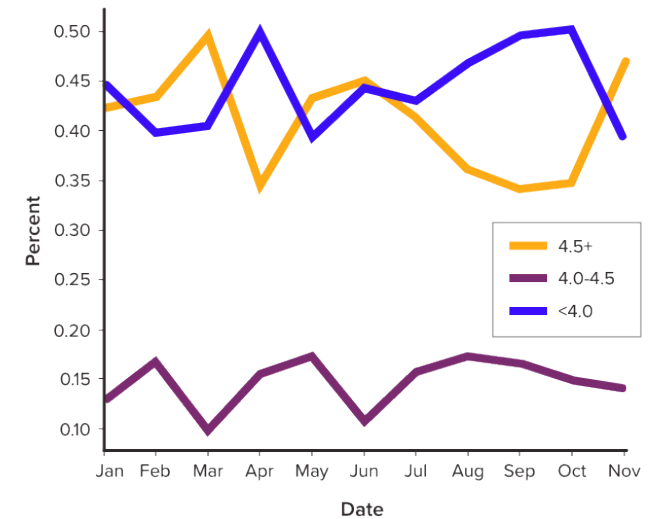


Tesla Stores Have Highly Polarized Ratings

The number of locations with either a 4.5+ star average or below 4-star averages hovers between 35-50% at any given month, with relatively few locations in the 4.0- 4.5 range.

This tells us that Tesla stores have highly polarized ratings and there are not many stores with ratings in the middle of the pack.

Monthly Industry Breakdown by Rating Tier



Regional Rating Benchmarks

Monthly average performance in 2023, automotive dealerships

4.31	WEST
4.45	MIDWEST
4.47	NORTHEAST
4.4	SOUTH

Import Dealers Generate 65% More Google Reviews

Average reviews per month by rooftop

12.2	Import
7.4	Domestic

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Reviews Per Month: Tesla vs Industry Average

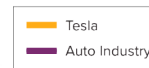
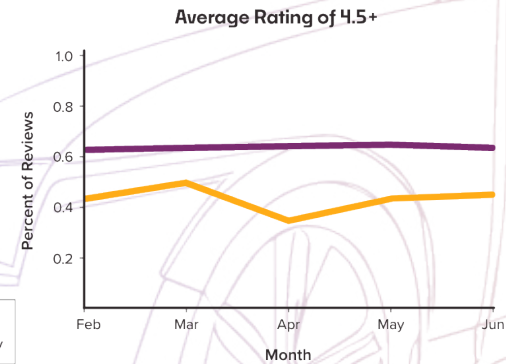
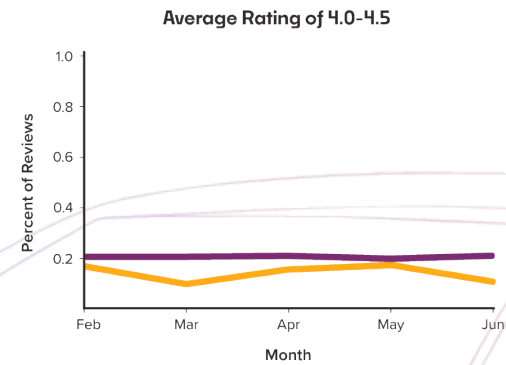
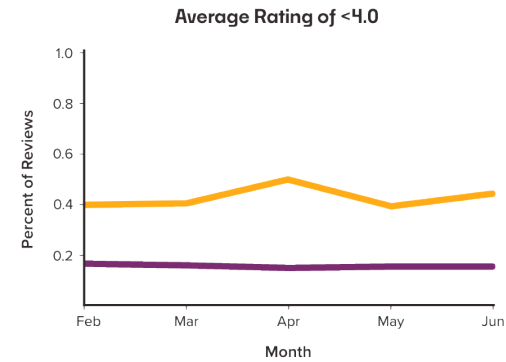
Tesla Star Rating Average is the Lowest of the Study

The average star rating of all Tesla's reviews is 3.89, much lower than the average of dealership-sold EVs (4.30 stars) and the industry benchmark (4.41 stars).

More Tesla Locations Have an Average Rating of Below 4.0

As we can see to the right, compared to the average auto dealer, a greater percentage of Tesla locations have an average rating of below 4.0, suggesting that Tesla stores have lots of room for improvement.

Monthly Breakdown by Rating Tier



Analysis: Why Tesla Ratings Are Low

Tesla's Google Reviews Are 3.2x More Negative than Auto Industry Benchmarks

Tesla has a unique standing in the automotive world—a strong brand with virality. And people love its products; Consumer Reports claims Tesla is #1 in owner satisfaction. Which begs the question: Why are its Google reviews so negative?

Tesla's negative review percentage is 32.5%, much higher than the traditional dealer model benchmark of 10%. Widetail categorizes a negative review as anything 3 stars or less.

A Business Model Where Face-to-Face Becomes Secondary

First, we must understand Tesla's go-to-market strategy and the unique role of its physical locations. Tesla sells its vehicles directly to consumers. Instead of going to a dealership to buy a car, Teslas are ordered online and delivered to your home. Tesla is the first automaker to sell cars this way, making the change in [2019](#). Today, some other manufacturers, like Rivian and Lucid, follow this model.

The result is a business where face-to-face interactions are a peripheral component—the complete opposite of the traditional way to buy a car. And from what we see in reviews, peripheral is how Tesla treats it. This gets us to the original question: Why is Tesla's customer sentiment far more negative than the rest of the auto industry?

Tesla's negative review percentage is **32.5%**, much higher than the traditional dealer model benchmark of **10%**.



Analysis: Why Tesla Ratings Are Low

Positive Ownership Moments Happen Elsewhere

With the excitement of a new Tesla expressed on social media and low-cost maintenance issues taken care of by the mobile service teams, Tesla's 184 service locations tackle the serious, expensive, and time-consuming issues. The negativity of this experience cuts through on Google at nearly 3.5 times the 1-star volume of traditional dealerships.

Low Review Volume Depresses Ratings

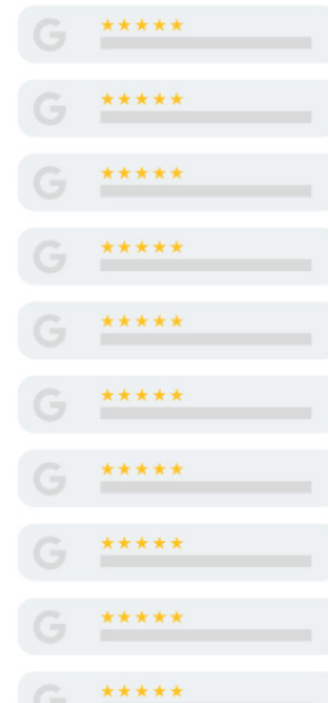
Tesla's review volume is tiny at just 2.6 monthly reviews per location, far shy of 9.6, the industry average.

Our research supports the correlation between customer engagement in reviews and positive outcomes. We find dealers with 30+ reviews a month average a 4.6-star rating, while those receiving 2-5 reviews a month average just a 4.2-star rating. Tesla's hands-off approach is likely contributing to a negative review bias.

2.6 Reviews/ Month



9.6 Reviews/ Month



Analysis: Why Tesla Ratings Are Low

Service Leans More Negative Than Sales

184 of 252 Tesla locations offer vehicle service. Looking at the broader automotive industry, we know that service reviews are more negative than sales. Removing the purchase experience from the physical locations means the positivity and excitement associated with getting your hands on a brand-new Tesla happens elsewhere. Search on Instagram for #tesladelivery, and you'll find thousands of excited buyers. But none of that excitement is captured on review sites where it positively impacts local search rankings.

Instead, the physical Tesla locations act as showrooms and service centers and receive more negative customer feedback. Widewail found that, in general, service departments tend to receive more negative feedback than sales departments, which can help to explain the negativity at Tesla locations.

Digital-First Communication Undercuts Leading Driver of Good Reviews for Rest of Industry

With appointments booked exclusively through its app, Tesla offers a low-touch experience, including mobile service at the owner's home, remedying small-to-medium issues, and larger issues handled at the service centers. The system is easy and efficient when effective but more vulnerable to frustrating outcomes for complicated and nuanced problems.

As noted earlier in the report, positive experiences with a dealership's staff are the primary drivers of positive review content. Referencing data from the broader automotive industry, the customers mention the "staff" category in nearly 80% of positive reviews, with specific mentions of personnel appearing in 57% of reviews.

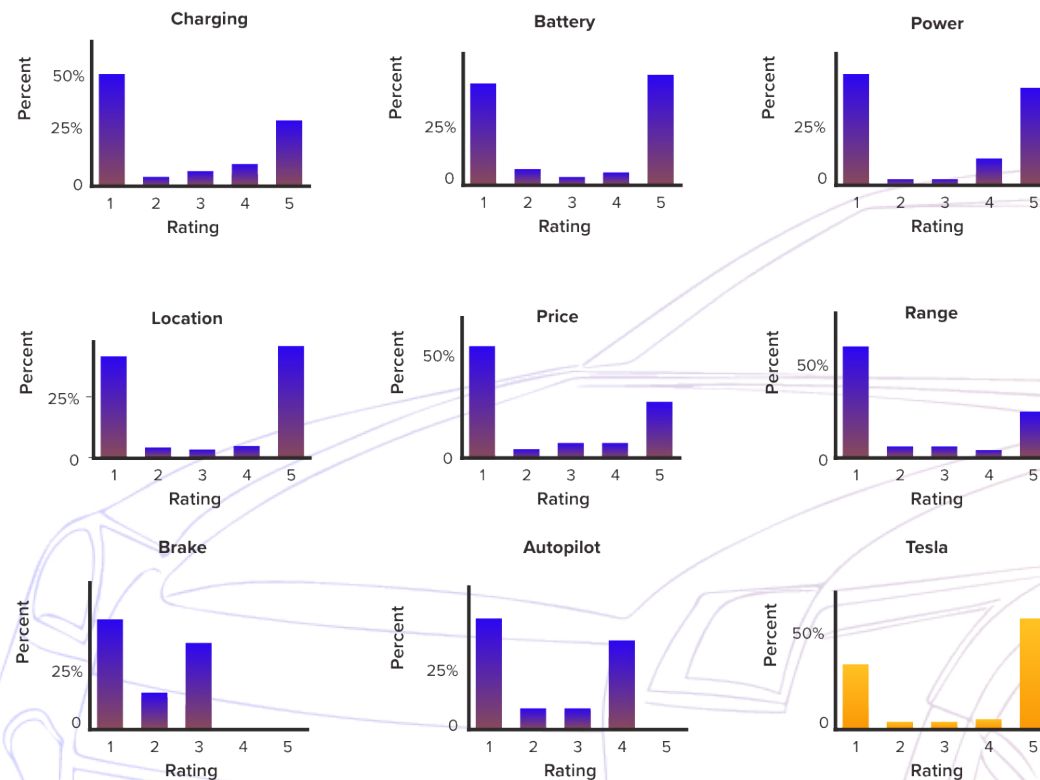
Tesla's app system undercuts the leading driver of good reviews for the rest of the industry by removing the majority of interactions with staff.



Analysis: Why Tesla Ratings Are Low

Tesla's Google reviews are vulnerable. The majority of Tesla's physical locations act as service centers. Tesla's model has moved positive moments off-site. Both purchases and quick maintenance wins happen at home because of online purchasing and scheduling service appointments with the company's mobile repair program, leaving the challenging and most expensive problems for the service centers. For example, a major service like a battery pack replacement [averages \\$5,500](#). These longer and more expensive repairs make up a significantly larger portion of their reviewable interactions, thus driving the average review rating downward.

Tesla Rating Distribution by Service Topic Mention



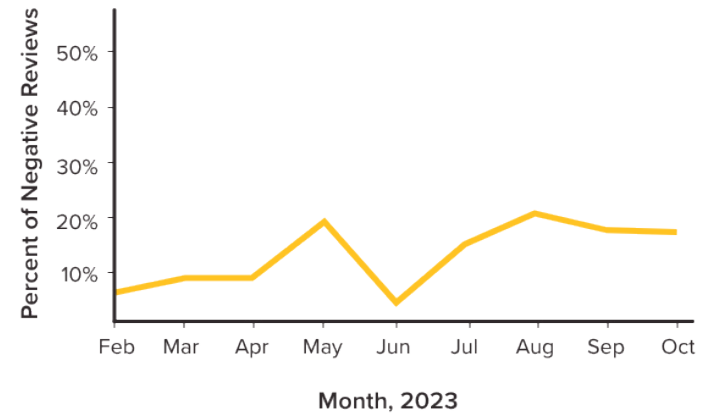
Rivian Spotlight

For Rivian, we notice an interesting trend. Unlike Tesla, which consistently received negative reviews throughout the 10-month timeframe, Rivian was received quite positively for most of 2023; however, it slowly started to decline starting in August.

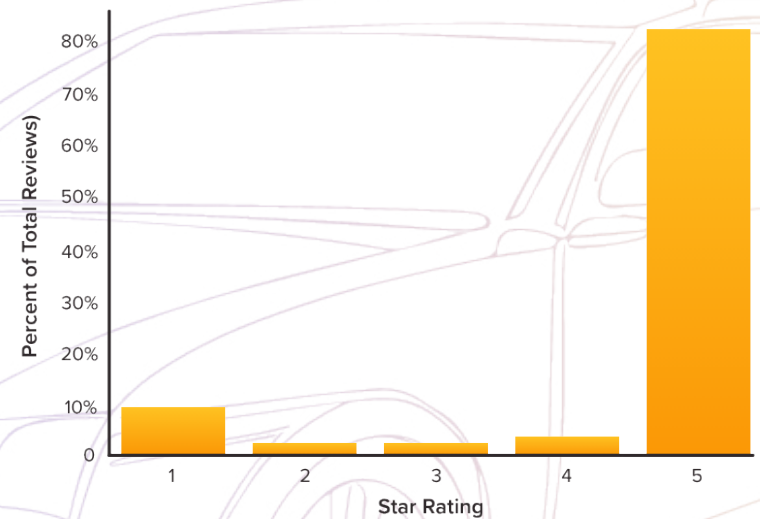
We were also surprised that none of the reviews mentioned common services like batteries, brakes, or autopilot-- which we saw in Tesla reviews. However, charging and power remained highly negative overall.

We note that unhappy Rivian customers are most likely to cite a lack of communication and service department - this is fairly common across the automotive industry. What is interesting to note, however, is how large of a factor wait times are. This could be due to both wait times for repairs as a result of the direct-to-consumer model and wait times for receiving new vehicles after purchase.

Percent of Negative Reivews Over Time for Rivian

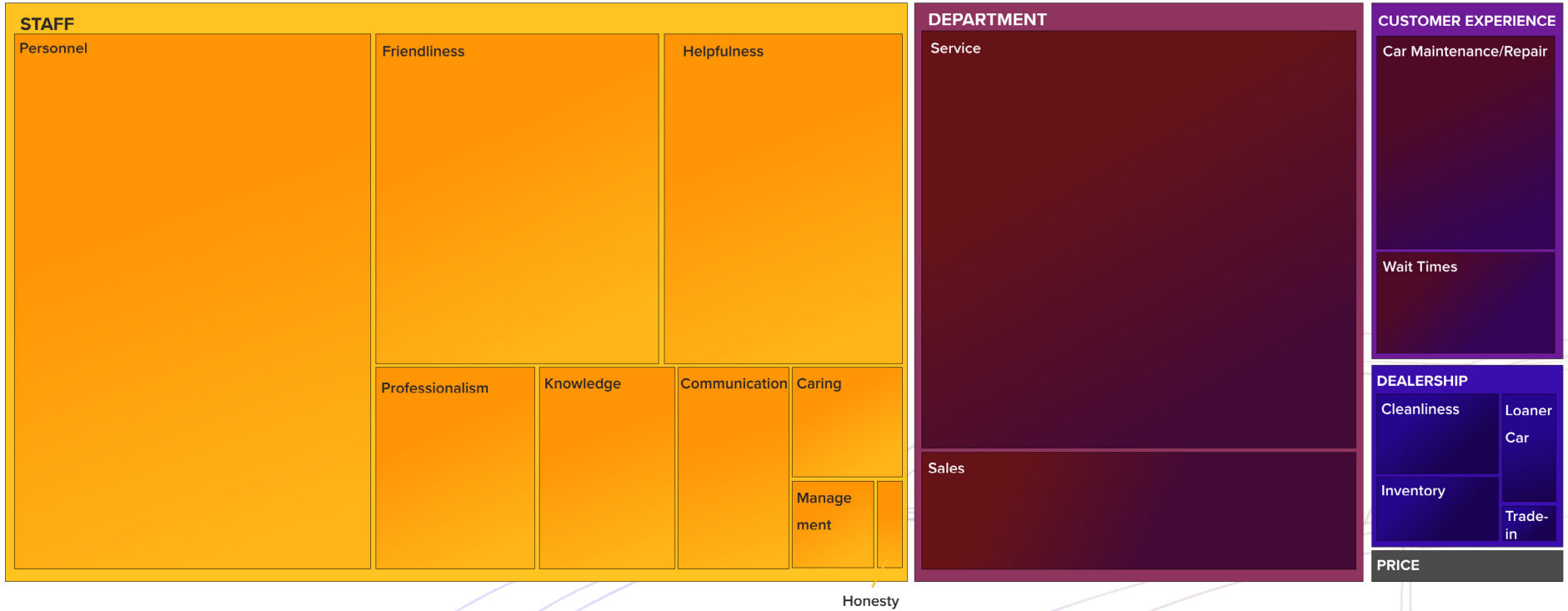


Rivian Rating Distribution



Rivian Spotlight

RIVIAN: WHAT ARE HAPPY CUSTOMERS TALKING ABOUT?

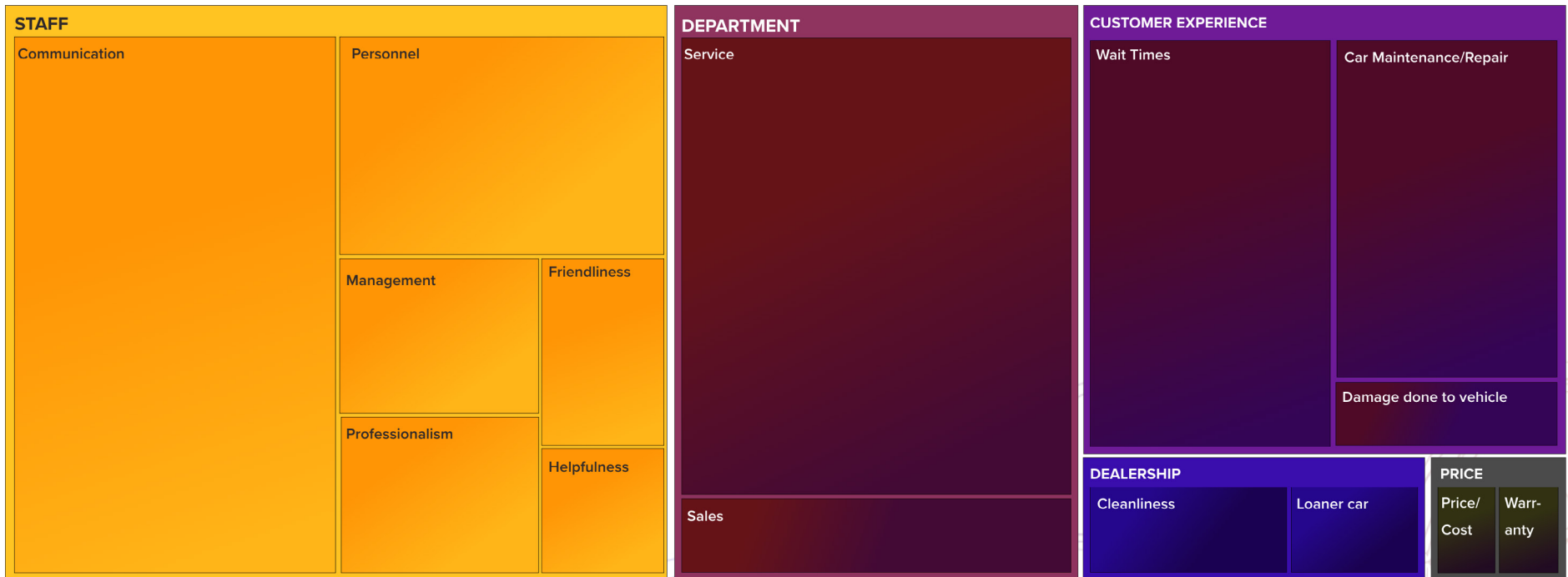


Personnel impacts **55%** of positive reviews and **23%** of negative reviews



Rivian Spotlight

RIVIAN: WHAT ARE UNHAPPY CUSTOMERS TALKING ABOUT?



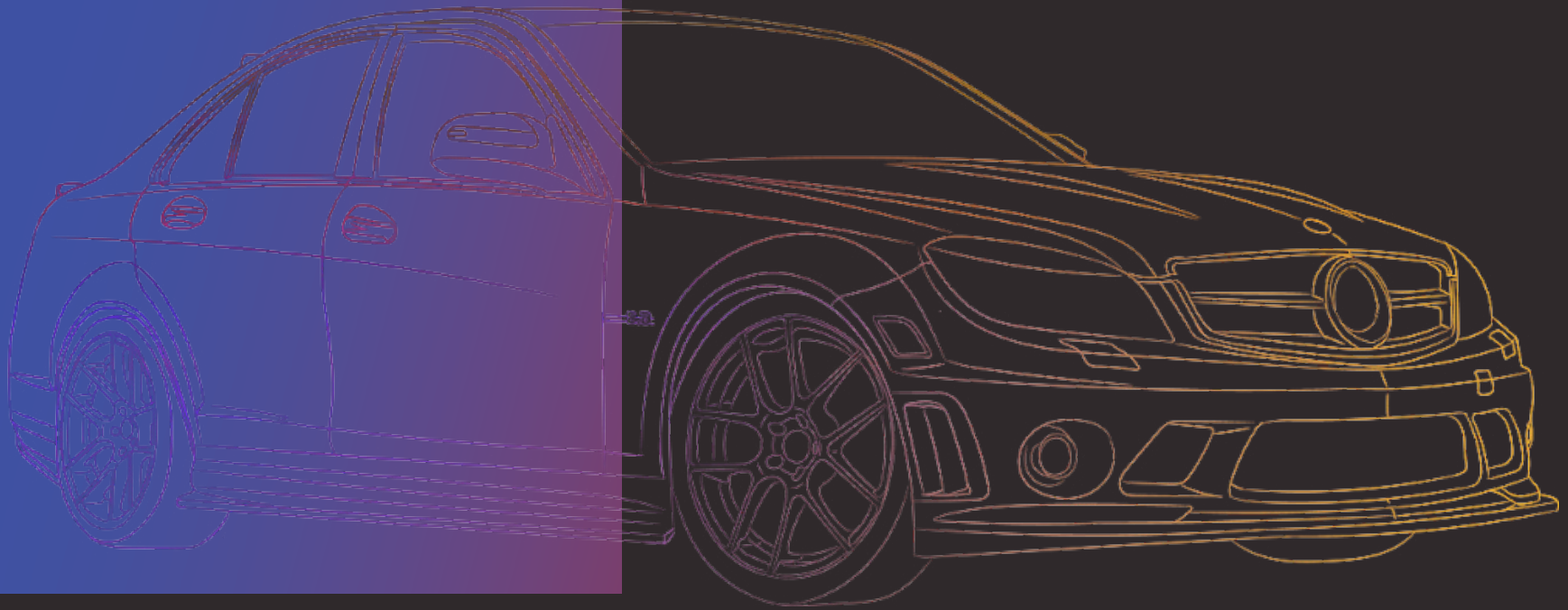
Communication is a large driver of negative reviews, appearing as an issue in **56% of negative reviews** and as a benefit in just **6% of positive reviews**

Wait times impact **1/3 of all negative Rivian reviews**



2023 Voice of Customer Report

Highlights



VOC stats to keep on-hand:

Positive Experiences With Staff Are the Most Predictive of a Positive Review Outcome

- » 80% of all reviews mention staff and 70% of those reviews are positive
- » Customers praise the qualities of helpfulness, friendliness and professionalism in 22% of all tagged topics
- » 57% of positive reviews mention individual team members

Ev Reviews Are More Negative Than the Rest of the Automotive Industry

- » The average rating of reviews mentioning EVs was 4.30 stars, less than the industry benchmark of 4.41
- » 32.5% of Tesla customer reviews are negative, 3x more negative than industry benchmarks
- » Tesla averages just 2.6 reviews per location each month, less than half the industry benchmark and 14x below the leading 40% of dealers

Negative Experiences Stem From Poor Communication in the Service Department

- » Poor communication is mentioned 37% of the time, making it a leading contributing factor to negative reviews
- » Price concerns are almost 5x more common among unhappy customers than happy customers
- » Wait time is cited as an issue 3.1 times more often in negative versus positive reviews

Despite Rising Car Prices, Pricing Meets Customer Expectations in 2023

- » Pricing is mentioned 46% more often in brake reviews than general negative reviews.
- » Deals don't make or break the customer experience; customers bring up deals in 3.8% of positive reviews and just 2.1% of negative reviews.
- » Q2 2023 interest rate hikes had no material impact on consumer sentiment



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