



Consumer Sentiment Survey

Changing Auto Service Dynamics



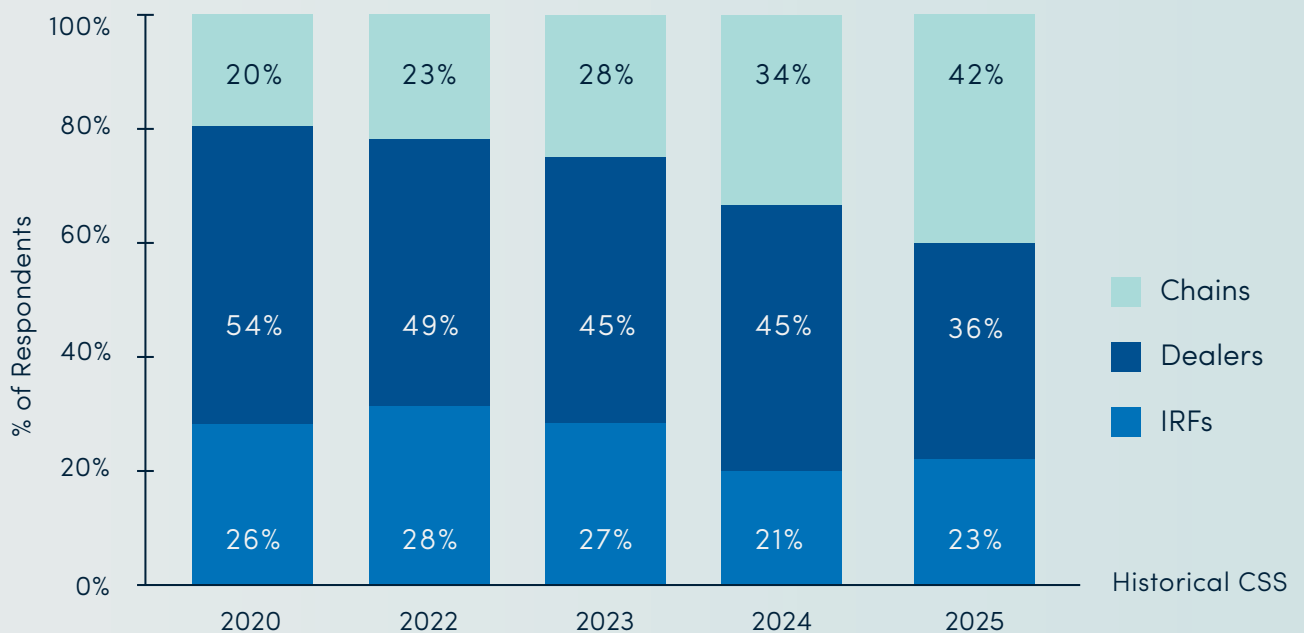
Introduction

For the first time in over a decade of our Consumer Sentiment Survey (CSS) data, chains surpassed dealers as the most frequently used provider for auto service.

Chains (Jiffy Lube, Walmart, Meineke, etc.) crossed that threshold between the 2024 and 2025 surveys. Over five years, the share of customers who noted that chains are their primary provider climbed from 20% to 42% while dealer share dropped from 54% to 36%. A 22-point swing in five years does not happen by chance, particularly because the trend has been regular and consistent.

Primary Service Provider (2020-2025)

Please identify your current primary service provider for your primary vehicle



Chains gained 22% pts. since 2020!

Dealers put themselves into a premium price position without delivering a premium experience.

Chains closed the gap from the bottom by increasing satisfaction at a faster rate than any other channel. Unsurprisingly, they retained their price advantage, a major contributor to their growing satisfaction. Dealers lose volume and increase prices to offset the lost revenue. Price increases drive out even more volume. Dealers think everything is fine because they see just as much revenue coming in, but their service market share shrinks every year. The cycle compounds, and the current economy is accelerating it.

Key Terms

A quick reference for terms used throughout this report.

Service Provider Types

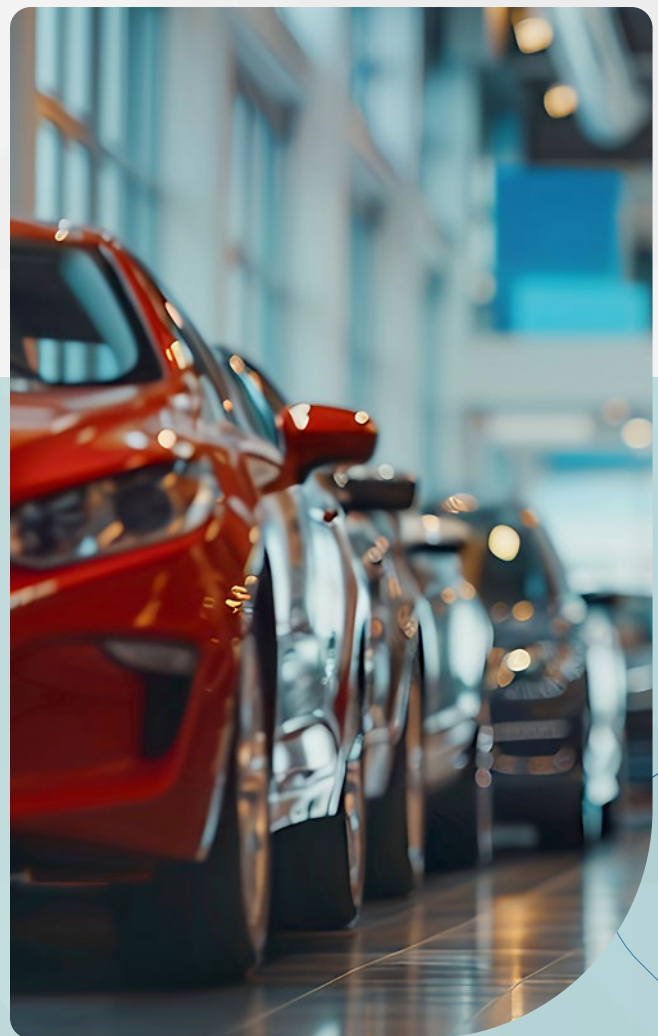
Dealer: A franchised new-vehicle dealership's service department. Examples: a Toyota, Ford, or BMW dealer service center.

Chain: A multi-location service brand operating independently of any vehicle manufacturer. Includes quick lube chains (e.g., Jiffy Lube, Valvoline), tire chains (e.g., Firestone, Discount Tire), and general service chains (e.g., Midas, Meineke, Pep Boys, Walmart).

Independent Repair Facility (IRF): A single-location or small-group repair shop not affiliated with a vehicle manufacturer or a national chain. Typically owner-operated.

For dealers, the priorities are to stop and reverse the erosion driven by price-value mismatch and declining customer satisfaction. For chains, the priorities are to close the quality and trust gap exposed by weak 'fixed-right-first-time' (FRFT) performance and to protect the price and convenience advantages that fueled their gains.

This report examines how the shift happened, where each channel is exposed, and what service providers can do about it.



Customer Definitions

Primary service provider: The location a consumer uses most often for vehicle service. Also referred to as 'primary provider.' Dealer, chain, and IRF customers refer to respondents who named that channel as their primary service provider.

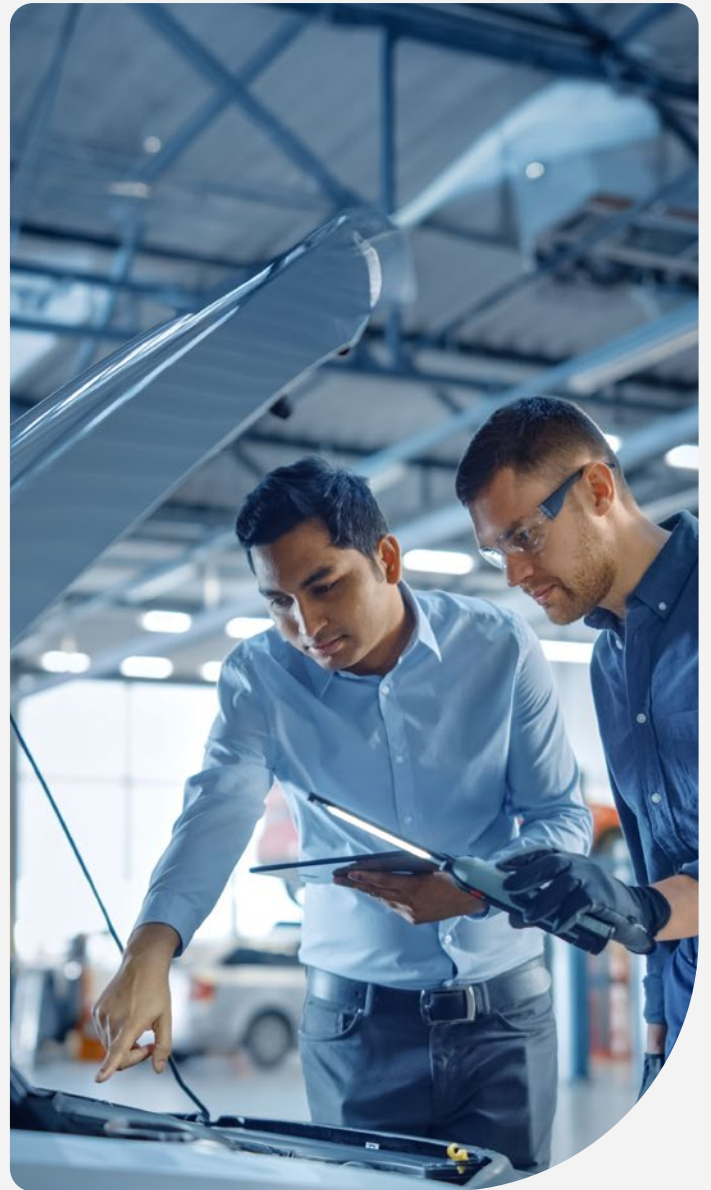
Key Metrics

Fixed Right First Time (FRFT): How often a repair customer's original issue is resolved on the first visit, without a return trip for the same problem. Reported by consumers in the CSS.

Net Promoter Score (NPS): A measure of customer loyalty. Consumers are asked how likely they are to recommend their service provider on a scale of 0 to 10. Scores of 9 to 10 are promoters, 0 to 6 are detractors. NPS equals the percentage of promoters minus the percentage of detractors. Higher is better, and in auto service, NPS correlates strongly with retention.

Research and Market Terms

Units in Operation (UIO): Also referred to as parc, the number of individual vehicles in a defined population, typically used when measuring retention or service penetration rates among a specific OEM's customer base.



At a Glance: What the Data Shows

Our 2025 Consumer Sentiment Survey tells a story of where customers are going, why they are going there, and what it takes for each channel to either hold its gains or reverse its losses. The table below previews the key findings.

Finding	Chains	Dealers
<p>Chains overtook dealers as the #1 share of primary service customers for the first time.</p> <p>Three independent data sources confirm the shift is broad-based and accelerating.</p>	<ul style="list-style-type: none"> • Chains are now the most common primary service provider. The CSS shows a primary service provider share increase from 20% to 42% in the last five years. This increase is also confirmed by two other independent data sources. 	<ul style="list-style-type: none"> • The decline is broad-based and accelerating. Sub-eight-year vehicle primary provider share dropped 20 points. Customers are choosing to leave, not aging out.
<p>The channel gaining the most share has the most cost-constrained customers.</p> <p>36% of all respondents are waiting to afford the service they need.</p>	<ul style="list-style-type: none"> • Your fastest-growing customer segment is also your most cost-constrained. 42% of chain customers are delaying needed service, the highest rate of any channel. 	<ul style="list-style-type: none"> • Your customers are the least likely to delay service. Only 25% are waiting to afford work, the lowest rate of any channel.
<p>An aging vehicle population and uncertain EV adoption are reshaping the addressable market.</p> <p>Neither is within a provider's control. Both require a response.</p>	<ul style="list-style-type: none"> • Vehicle age trends are moving customers your way. Target 4-6-year-old vehicle owners leaving the dealer out of habit. • EV share is increasing. While 50% would never buy an EV, EV adoption continues to grow. 	<ul style="list-style-type: none"> • Your core service demographic is shrinking. The 1-7 year-old vehicle segment declined by 6.25% since 2019. • EV owners prefer you, but the tailwind has a shelf life. Chains and IRFs will find ways to improve their EV service offering.
<p>Price, satisfaction, quality, and convenience all show competitive disparities.</p> <p>These are within a provider's control and where the largest opportunities exist.</p>	<ul style="list-style-type: none"> • Price and convenience are driving your growth. Customers spend 36% less at IRFs and 48% less at general chains (non-tire/quick lube). • Quality is the biggest vulnerability and the hardest to fix at scale. 12-point fixed right first time (FRFT) gap (77% always or often fixed right first time vs. 89% at dealers). • High traffic is masking a retention problem. 17-point net promoter score (NPS) drop among non-loyal customers. 	<ul style="list-style-type: none"> • Pricing has outpaced the economy and consumer tolerance. Costs are up 82% since 2016 vs. 31% in the consumer price index (CPI); dealers are now twice as likely to be perceived as expensive. • The experience is consistent but underwhelming. Lowest primary provider net promoter score (NPS) at 49, but the narrowest NPS score gap between primary service customers and all visitors of any channel. • Your strongest advantages are largely invisible to consumers. Lead all channels on fixed-right-first-time (FRFT) and perceived quality.
<p>The threat facing each channel is different but equally pressing.</p>	<ul style="list-style-type: none"> • Growth is outpacing operational readiness. Share gain without retention is unsustainable. 	<ul style="list-style-type: none"> • A compounding cycle with no built-in brake. Rising prices and falling retention reinforce each other; your strongest advantages are your least visible ones.

About the 2025 Consumer Sentiment Survey

The 2025 Consumer Sentiment Survey reflects responses from 4,820 consumers. We normalized the survey sample for age in 10-year brackets to reflect the U.S. population, with no age group skewing more than $\pm 1.5\%$ from expected census levels. Respondents are 53% male and 47% female. The average vehicle is a 2016 model year with 90,000 miles. Seventy-nine percent are driving internal combustion engine vehicles, while 17% are driving gas-hybrid vehicles, and 3% are driving full-electric or partial-hybrid electric vehicles. Regionally, 44% of respondents reside in the South, 24% in the Midwest, 18% in the West, and 14% in the Northeast.

Three Data Sources, One Direction

We track the service industry through three data sources. All three show the same overarching outcome: dealers lose business and chains pick it up.

The Consumer Sentiment Survey

captures where consumers take their vehicles for service, how satisfied they are, and what influences their behavior. Annual surveys since 2014 provide the longitudinal data required to analyze five-year changes.

Our original equipment manufacturer (OEM) service benchmark data

draws on self-reported data from 19 OEMs. Of the nine automotive OEMs that have reported every year since 2016, seven have lost share of service on vehicles one to seven years old. The average loss is 14%.

Our transaction data

analyzes approximately six billion annual credit and debit card transactions across the Visa and Mastercard networks, providing visibility into real customer spending behavior at auto service providers down to the postal-code level, covering market share, pricing trends, and cross-shopping patterns. Transaction data referenced in this report covers January 2022 through April 2025.

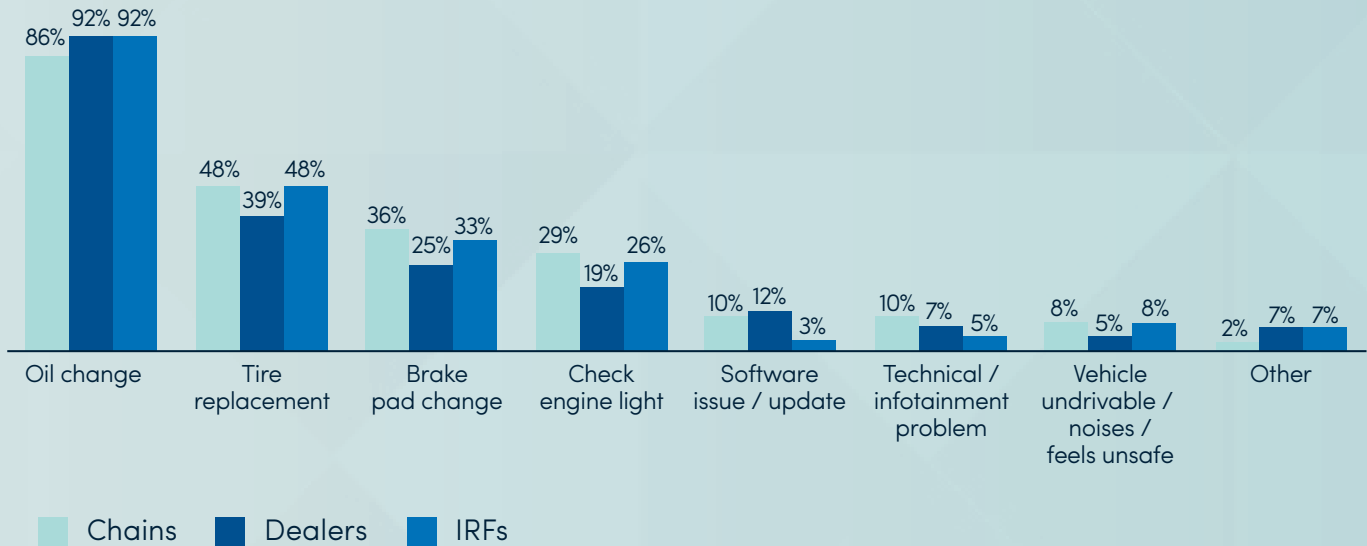


What Consumers Are Buying

Oil changes are the most common service across all provider types, followed by tire replacement and brake pad changes. The pattern is consistent across channels, though dealer customers are less likely to receive a wide range of services because they tend to own newer vehicles. Among chain primary provider customers, 86% received an oil change in the last two years, 48% had tires replaced, and 36% had brake pads changed. Dealer customers show a similar pattern.

Services Received by Respondent's Primary Service Provider

What service have you received in the last 2 years?



Chain customers visit more providers per service type than dealer or independent repair facility (IRF) customers. Dealer customers are most likely to have serviced their vehicle only once in two years. The services where consumers shop around most, routine maintenance and tire work, are the same services where chains compete hardest on price and convenience. That overlap is the mechanism through which chains are gaining share.

How This Report Is Organized

The following sections break the drivers into two buckets: structural and operational. Structural drivers such as vehicle age and electrification are outside of the provider's hands. Operational drivers, such as satisfaction, price, quality, trust, and convenience, are within their hands. In each, we examine where chains outperform, where dealers outperform, and what levers can influence change.

Capture the Next Generation:

For respondents aged 18 to 24, the first wave of consumers making their own vehicle service choices, dealer primary provider share decreased to 29% in 2025, down from 50% in 2020, while chain share increased to 51% (22% in 2020). This age group has the shortest provider tenure of any age segment and is the most likely to switch providers. Where they are going today, the rest of the market will follow. Note: the 18-24 cohort is a smaller sample than other age brackets. The patterns are directionally consistent with the 25-34 cohort but should be read as indicative rather than precise.



The Market: Where Customers Are Going

Two questions determine market health: is the market growing, and are you capturing your share? For automotive service providers in 2026, neither condition is guaranteed.

Consumers Are Pulling Back on Service

The addressable market is not growing as fast as the vehicle count would suggest.

More people are putting off repairs than they were two years ago. Chain customers are the most likely to defer.

Channel	More likely to defer non-critical repair	Less likely to defer non-critical repair
Chains	37%	24%
Dealers	30%	18%
IRFs	29%	18%

36% of all respondents said there is work they need done, but are waiting until they can afford it. The pattern is most pronounced among chain customers (42%), with IRF customers in the middle (34%) and dealer customers least likely to defer (25%).



Source: Ducker Carlisle Consumer Sentiment Survey, 2025.

But the age story is more compelling: 43% of 25-34-year-old consumers are holding back on service because of price, compared to 17% of consumers 65 and over.

Younger consumers are the fastest-growing segment of the chain customer base and are also the ones most likely to hold back on the spending

that chains need in order to convert share into revenue. For chain operators, this suggests that share is not the same as revenue when your customer base is the most price-sensitive segment in the market. We see this reflected when comparing market share of dollars versus car count. Chains perform strongly on count-based market share, but are weaker on dollars-based market share.

Chains Gained 22 Points of Respondent-Reported Primary Customer Share in Five Years

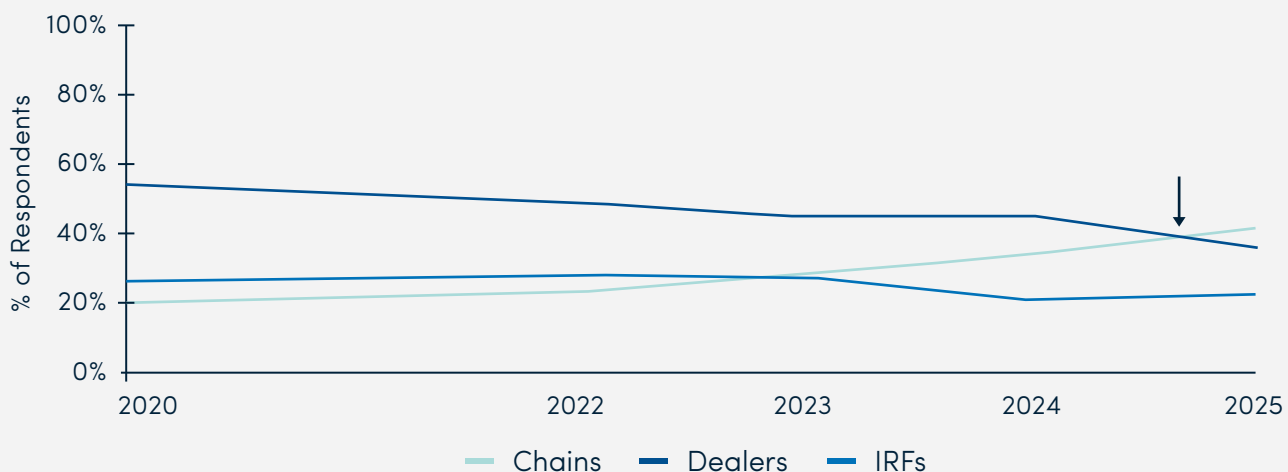
In 2020, dealers held 54% of primary provider share, chains held 20%, and IRFs held 26%.

By 2025, dealers dropped to 36%, chains climbed to 42%, and IRFs slipped to 23%. Chains passed dealers between the 2024 and 2025 surveys for the first time.

Over time, the dealership is increasingly less popular while chain popularity rises

Primary Service Provider (2020-2025)

Please identify your current primary service provider for your primary vehicle.



Dealers Are Losing Newer-Vehicle Owners Too

The instinct is to blame the decline in dealer business on vehicle age.

Vehicles migrate out of the dealer channel as they age: 55% of zero-to-three-year-old vehicle owners go to a dealer, while only 17% of 10+ year-old vehicle owners go to a dealer. As the parc ages, some attrition is to be expected.

The data tells us something the aging parc alone cannot account for.

For owners of vehicles less than eight years old, the dealer's core segment, primary provider share declined from 68% in 2020 to 48% in 2025. During that same time frame, chain primary provider share for those same newer-vehicle owners increased from 21% to 41%.

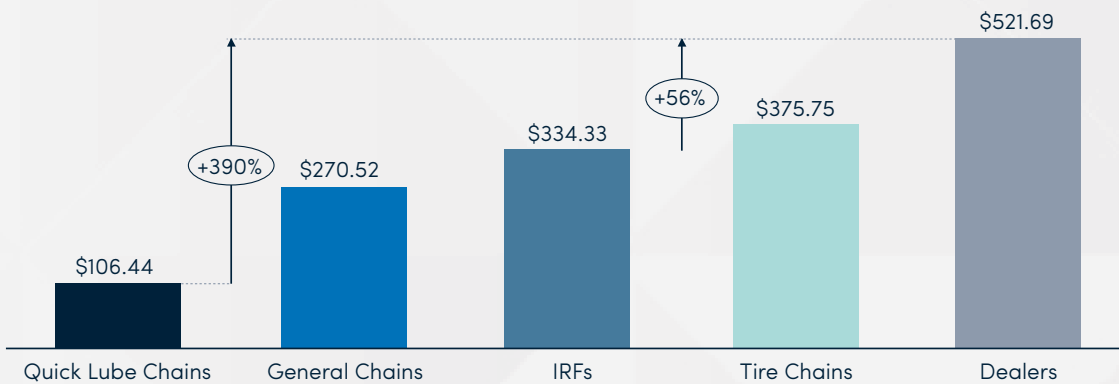
68% → 48%

Dealer primary provider share among sub-eight-year-old vehicles, 2020 to 2025

Transaction Data Reveals the Pricing Gap

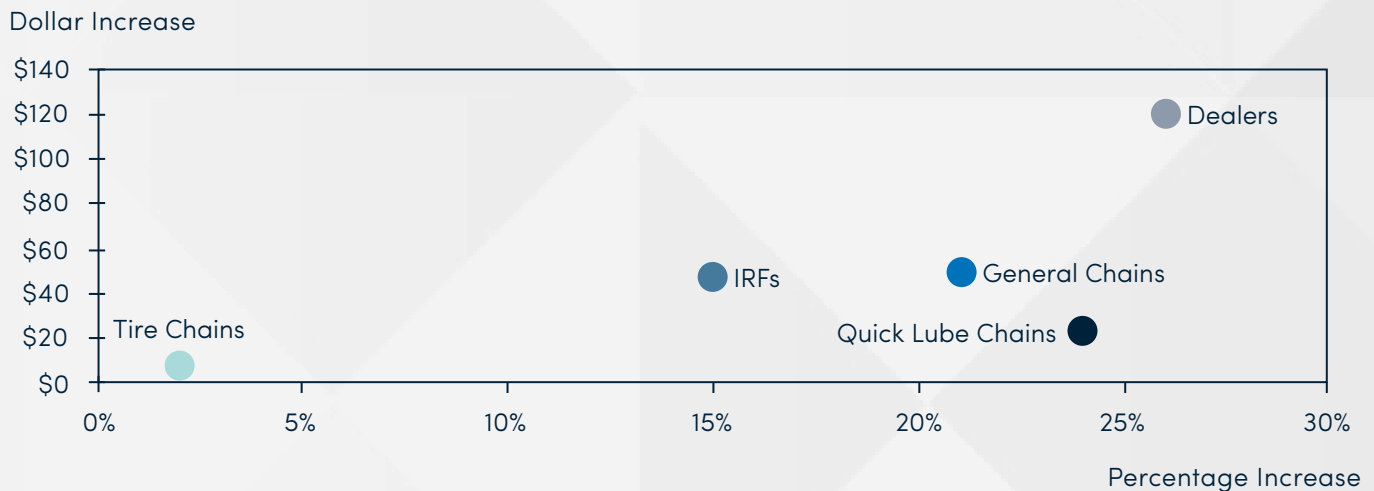
Credit card transaction data adds a third dimension. Dealers are the most expensive channel by a wide margin.

Dollars per Transaction by Industry Segment



That is a 56% premium over IRFs, who typically provide a similar scope of service. The gap is growing: dealer transaction costs increased \$120 since 2022, the largest absolute increase of any channel.

Average Cost of Transaction Increase Between 2022-2025 - Dollars and Percentage



Prices Up, Retention Down: A Compounding Problem

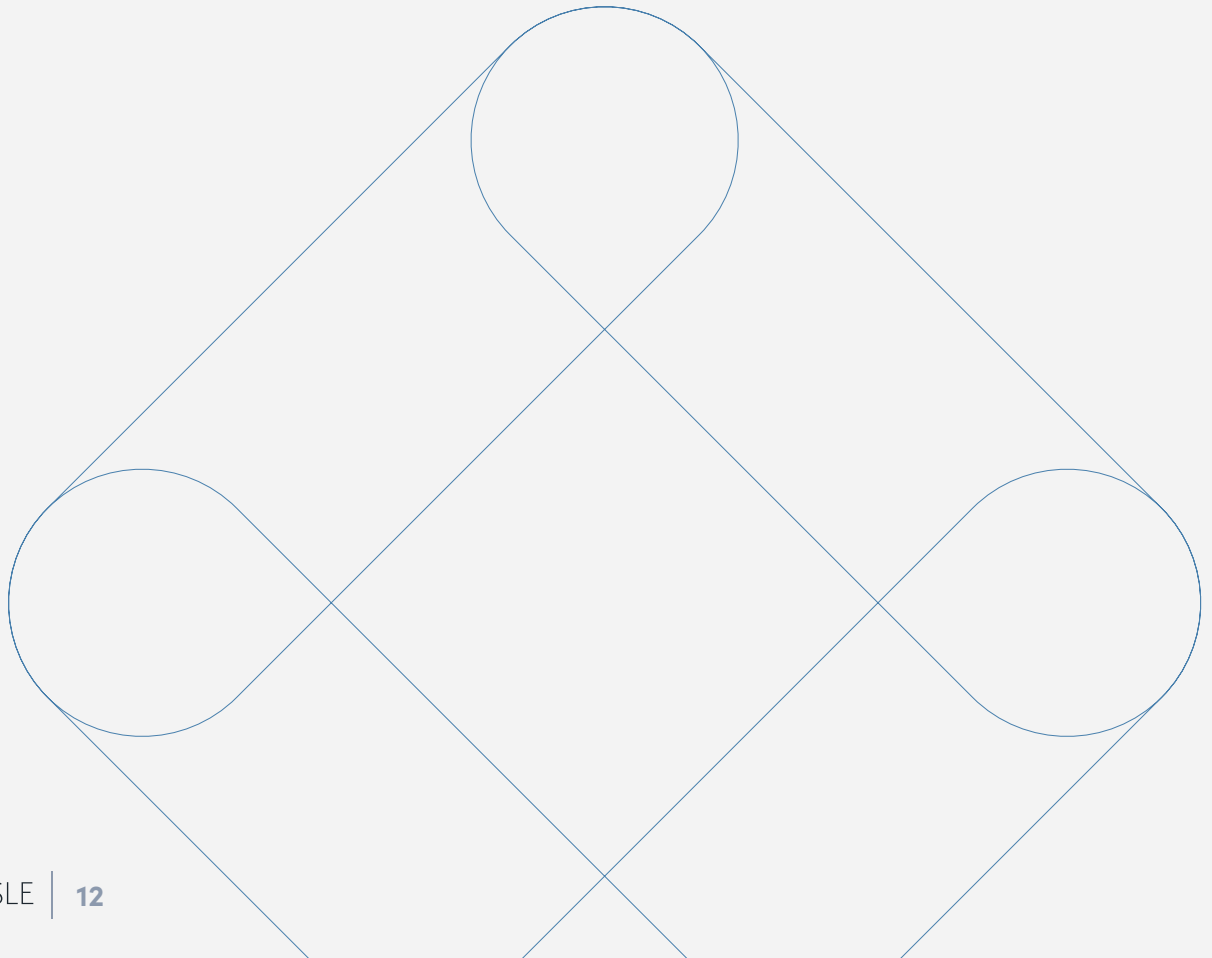
Since 2016, average customer-pay sales per repair order at dealers increased 82%. Over the same period, the consumer price index (CPI) rose 31%.

That gap is the core of the dealer pricing problem: costs to the customer rose more than twice inflation.

This creates a cycle that feeds itself: fewer customers walk through the door, and the ones who remain pay more. As the base shrinks, revenue per visit must rise to maintain margins, which pushes more customers toward lower-cost alternatives. The current economic environment of inflation, tariff uncertainty, and consumer caution accelerates every stage of this cycle.

Chains have run the opposite direction: lower prices, more locations, rapidly improving satisfaction.

NPS jumped from 32 to 56 between 2022 and 2025. Dealers improved from 35 to 49 over the same period, suggesting both channels are getting better. But chains are getting better faster, and the next section examines what is driving that acceleration.



Market Factors: Why the Shift Is Happening

The market share data tells us **what** happened. This section examines **why**. We identified several factors driving the shift, falling into two categories: structural factors largely outside a provider's control and operational factors within their ability to change.

Structural Shifts

Structural factors set the playing field. Service providers must adapt to them but cannot directly control them.

Vehicle Age: An Aging Parc Favors Chains but Does Not Explain the Full Shift

More respondents acquired their vehicle used in 2025 (51%) than new (49%).

In 2015, the split was 35% used and 65% new. That shift is shrinking the dealer's addressable market from the intake side. The one-to-seven-year-old vehicle population, the dealer's core service demographic, declined 6.25% among participating OEMs between 2019 and 2024.

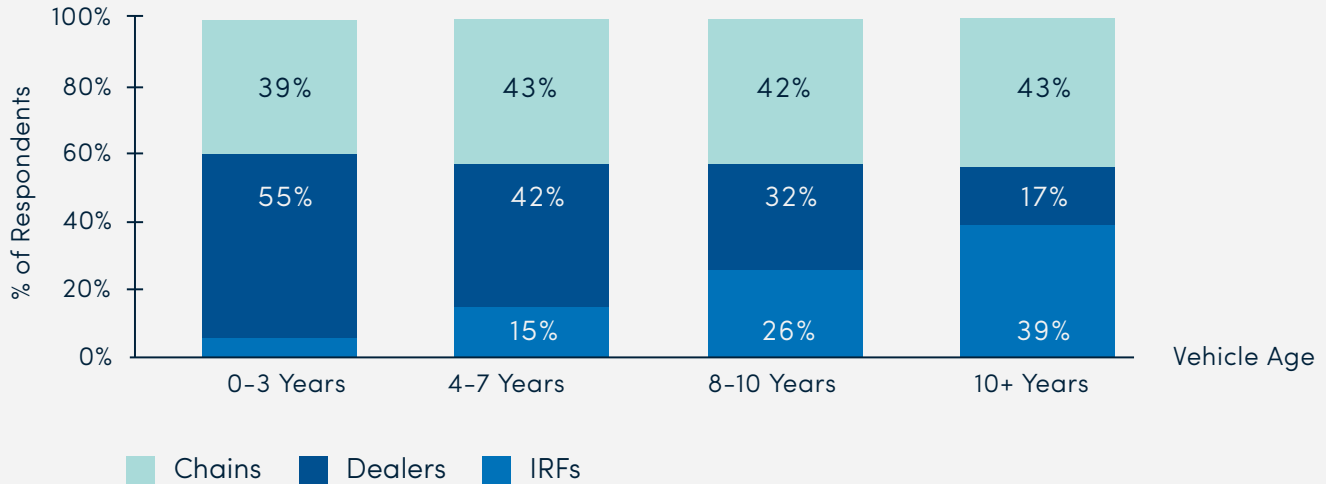
The pattern is predictable up to a point. As vehicles age, owners shift away from the dealer. 55% of zero-to-three-year-old vehicle owners choose a dealer as primary provider, compared to 32% for four-to-seven-year-old vehicles and 17% for 10+ year-old vehicles. As a vehicle ages, the dealer relationship weakens. That part is structural and expected.

What the aging parc does not explain is the pace of the decline in newer vehicles.

Dealer primary provider share among sub-eight-year-old vehicles dropped 20-points since 2020. The aging parc is a real headwind, but a 20-point loss on vehicles still in the dealer's core service window points to something beyond age. The structural shift is creating the opening. The operational factors examined in the following subsections explain who is walking through it.



Primary Service Provider by Vehicle Age



Chains:

Vehicle age trends are moving customers your way. The immediate opportunity is the four-to-six-year-old vehicle owner who still visits the dealer out of habit, not loyalty. Target them at the moment the dealer relationship weakens.

Dealers:

Vehicle age is working against you structurally, but it does not explain the full decline. The pressing question is whether you are giving younger-vehicle owners a reason to stay once the warranty relationship ends.

Electrification: A Temporary Tailwind for Dealers, a Narrowing Window for Chains

EV owners choose dealers for service at a higher rate than ICE vehicle owners.

Among participating OEMs, 56% of EV units in operation (UIOs) had at least one customer-pay visit within one year, versus 52% for all UIOs. Within two years, EV retention climbs to 64%. Transaction data tells a similar story: roughly 48% of non-Tesla EV owner service transactions occur at dealers, and about 70% of their service spend. Although dealers retain approximately 8% more

EV customers, they earn 37% less per vehicle from them. (Note: “dealers” in this context includes OEM-owned service centers such as Tesla and Rivian.)

The future size of this segment is increasingly uncertain. Fifty percent of 2025 respondents said they would never buy an EV, up from 35% in 2022. Only 8% plan to buy one. EV interest remains significantly higher among younger consumers, and industry forecasts still project the battery electric vehicle (BEV) parc tripling by decade’s end, but the timeline has stretched. For dealers, the EV tailwind is real but fading. For chains, the window to invest in EV capability is still open, but it is narrower than it was a year ago.

As vehicle complexity increases, IRFs face a mounting challenge:

Specialized tools and training become more expensive, and mastery across an expanding range of powertrains is harder for a single-location operator to maintain. This should be a structural advantage for dealers, yet they are still losing share. For chains, the lesson is that investing in EV and hybrid capability now builds a barrier to entry that IRFs will struggle to match.

Chains:

Chains lose EV business because consumers believe they are not capable, often indicated by an insufficient understanding or communication of that understanding on their websites. Chains that show customers they are EV-centric will take share as the EV parc grows. The window to invest is open but narrowing: once dealers and IRFs lock in EV-owner relationships, the cost of winning share rises sharply.

Dealers:

EV owners choose you at higher rates today, and that is your current advantage. Although EV market growth is slower than expected, it is still strongly positive, and the market is not yet saturated with capable service providers. This is the window to become the go-to option before competitors establish themselves.

Operational Factors

Operational enablers are completely within the provider’s control. These are where we see the biggest competitive disparities in the data and the greatest scope for intervention.

Customer Satisfaction: Chains Are Closing the Gap

Net Promoter Score (NPS): the higher the NPS, the more likely a customer is to recommend their service provider. 9 or 10 is a promoter; 0-6 is a detractor. NPS = % of promoters minus % of

detractors. This is a common loyalty metric, and in the auto service industry, it correlates well with retention.

On the primary service provider side, dealers now have the lowest NPS in the industry at 49.

IRFs are at 57, chains are at 56. But it has not always been that way. In 2022, chains were at 32, and dealers were at 35. Chains are up 24 points in three years. Dealers are up 14.

Channel	2022 NPS	2025 NPS	Change
IRFs	53	57	+4
Chains	32	56	+24
Dealers	35	49	+14

What matters is the rate of improvement. Both channels got better, but chains got better faster, leapfrogging the dealers in the interim. A 24-point NPS increase in just three years reflects a meaningful improvement in the chain experience, not just a statistical blip.

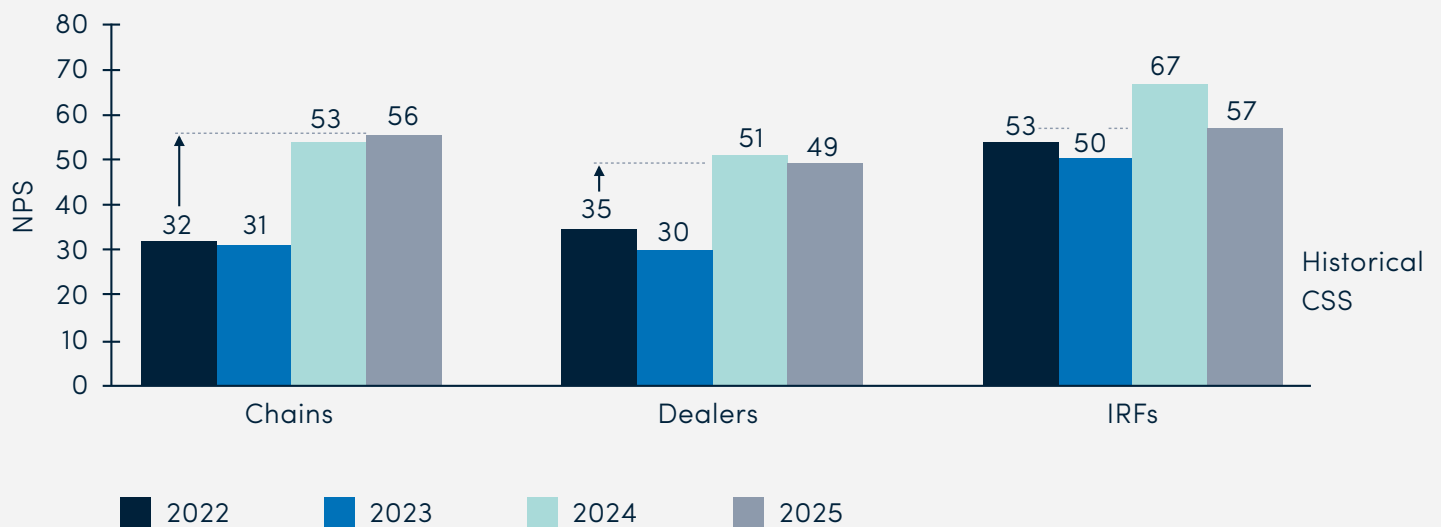
The more telling measure is one we tracked for the first time this year: NPS not just for the primary provider but for all providers a consumer has visited in the past two years.

Those numbers reveal a retention issue that the primary provider numbers do not.

Channel	Primary Provider NPS	Recent Customer NPS	Gap
IRFs	57	47	-10 (17%)
Chains	56	39	-17 (30%)
Dealers	49	43	-6 (13%)

Net Promoter Score by Primary Service Provider Customers (2022-2025)

How likely are you to recommend your primary service provider?



Chains fall 17 points when we look at all recent customers, not just repeat ones.

Dealers fall just six points. The chain drop is the largest for any channel, and it tells us something specific: people are visiting chain locations but not coming back. All those extra visits are covering up a retention issue. The primary provider NPS tells us that chains are keeping their core customers happy. The all-customer NPS tells us they are not retaining their trial customers.

Employee turnover is a major driver of the retention gap.

At chain operators, annual technician and service advisor churn can exceed 50%. At dealerships, the picture is better but still difficult: technician churn averaged 27% in 2024, and service advisor churn averaged 38%. This matters because in automotive service, customer loyalty is to people, not brands. The customer does not say “I go to Goodyear.” They say, “I go to Jacob.” When Jacob leaves, the customer stops coming back. A chain location with a 10-year employee does not feel like a chain. A chain location with a revolving door does.

A second factor is short-term incentives: Chains and dealers alike are incentivizing today’s deal at the expense of the customer’s best interest.

Selling a customer a service they do not need will pump up today’s repair order. It will erode tomorrow’s NPS. The cumulative impact of short-term incentives on customer trust is impossible to quantify on a given visit. But it is evident in the difference between primary provider and all-customer NPS, especially for chains, for whom the 17-point falloff indicates that first-time customers are not getting an experience that merits a return visit.

The service advisor’s role deserves particular scrutiny here. The data is clear that NPS correlates most closely with the service advisor interaction. Yet most compensation models in both channels reward same-day revenue rather than long-term retention. A service advisor who upsells a customer on work they do not need will generate a larger repair order today and a lower NPS tomorrow. Repositioning the service advisor as a retention role rather than a sales role, with compensation tied to repeat visits and customer lifetime value, would directly address the incentive misalignment that both the turnover data and the primary provider-to-all-customer NPS gap expose.

IRFs post the highest NPS of any channel

at 57, the near-highest FRFT, and the longest average customer tenure. They achieve this without national brands, centralized marketing, or digital scheduling platforms. The advantage is operational culture: stable workforces, long-term customer focus, and a business model that does not incentivize short-term upselling. For chains and dealers alike, IRF practices represent what good looks like when the focus is on the customer rather than this month’s numbers.

NPS does not move in isolation; it results from the operational drivers we explore in the following four sections: price, quality, trust, and convenience. All of these components contribute to the index and can be measured. All have different competitive ramifications for chains and dealers.

Chains:

Your loyal customers rate you at 56. All recent visitors rate you at 39. That 17-point gap, the largest of any channel, means customers are walking in once and not coming back - high churn. Frontline employee turnover above 50% is a primary driver, because when the advisor a customer trusts leaves, the relationship leaves with them. Reducing technician and service advisor turnover is the most direct path to converting trial visits into repeat customers.

Dealers:

Your primary provider-to-all-visitor gap is the narrowest in the industry at six points. That consistency is an advantage, but service advisor turnover averaging 38%* puts it at risk. The problem is that fewer customers are choosing you in the first place. Protect the relationship equity you have by retaining the advisors your loyal customers already trust, and address the visibility gap that keeps new customers from walking in.

*Average dealer service advisor retention from Ducker Carlisle OEM benchmarks

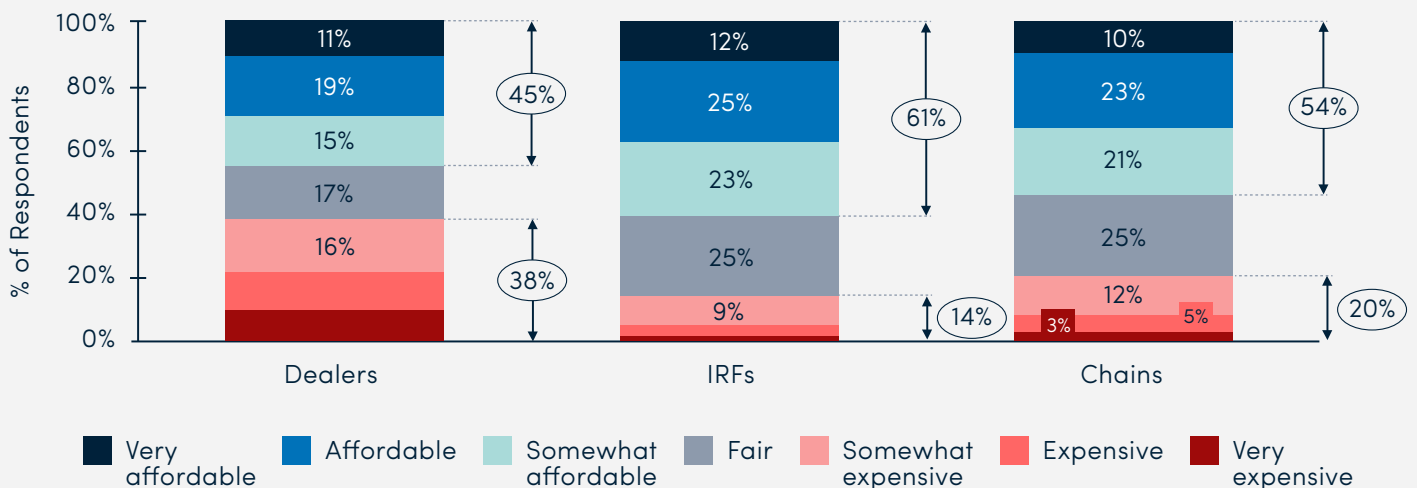
Price: Chains Hold the Advantage, Dealers Pay the Perception Tax

The chain customer is the most price-focused in the market.

64% of chain customers say price matters more to them than their overall customer experience, compared to 56% of dealer customers and 53% of IRF customers. Price is not the only consideration in this market, but for chain customers, it is the dominant one.

How do you perceive the pricing of these service providers?

All respondents for each type of provider



Consumers consider dealers pricey. Whether that price reflects the experience is a different matter.

But 38% of all survey respondents describe dealers as somewhat expensive, expensive, or very expensive, which is roughly double the rate for chains and nearly three times the rate for IRFs. And credit card transaction data suggests the perception has a basis in fact. The average dealer ticket is \$522, compared to \$334 at an IRF and \$271 at general chains. As noted earlier, the IRF comparison is the more relevant benchmark given similar service complexity.

The gap is growing. Dealer transaction prices have increased \$120 per transaction since 2022, the most of any segment, compared to \$48 at IRFs. Since 2016, average customer-pay sales per repair order at dealerships increased 82% compared to 31% for the consumer price index. For consumers who already assume dealerships are more expensive, this trend reinforces that decision. For consumers who have not made a comparison, it establishes the presumption that dealerships will be expensive before they even arrive.

Financing converts deferred maintenance into completed transactions.

Chains are already winning this battle. Chains offered financing to 36% of customers at their last visit, more than dealers (23%) and IRFs (14%) combined. Why does this matter? Because the customers most likely to need financing are also the most likely to postpone service. Remember that 42% of chain customers are waiting until they can afford the work.

Next Generation Capture:

Among 18 to 24-year-olds, 38% are waiting until they can afford service, versus only 17% of those 65 and older. They are also most likely to shop around: 60% compare prices online, while only 24% of those 65 and older do so. Price transparency is not a differentiator for Gen Z owners. It is a given. Yet dealers often do not post prices online at all, ceding the price conversation to chains and IRFs before the customer ever walks in.

Despite this, loyalty programs are rare in the industry, and the channels best positioned to use them are not the ones offering them.

Channel	Customers offered a loyalty program	Enrollment rate when offered
Chains	41%	69%
Dealers	31%	75%
IRFs	9%	60%

Value framing shifts the price conversation from “how much” to “what for.”

Price sensitivity is not absolute, and consumers say they will pay more when the value is clear. 41% say they will pay a 10% premium for an authentic or genuine part. The stated willingness to pay for sustainability runs even deeper: 70% say they will pay a 10% premium for a more sustainably produced part, and 40% say they will pay a 40% premium for one. Stated intent and actual behavior are not the same, but the consistency of the responses across categories indicates real opportunity for value-based pricing when providers define the value.

Next Generation Capture:

Only 53% of consumers aged 65 and above said they would pay 10% more for a sustainably made part, compared with 89% for 18 to 24-year-olds.

Sustainability is a source of purchasing consideration for the latest wave of car buyers, not a buzzword. Suppliers and service providers that can communicate how their parts and business processes are sustainable can command a premium price without a discount.

Chains:

Your price advantage is real and confirmed by transaction data. But 42% of your own customers are delaying service until they can afford it. Expand financing offers, the customers most likely to need it are the ones most likely to postpone. Free OEM maintenance programs also temporarily remove price-sensitive newer-vehicle owners from your addressable market. Plan acquisition outreach to capture them when that coverage ends

Dealers:

You are roughly twice as likely to be perceived as expensive compared to IRFs, even when your prices on standard maintenance are comparable. That perception is set before the customer arrives. Three levers address it directly: proactive price communication for routine services where the gap between actual price and consumer assumptions is largest; expanded financing options (currently offered at only 23% of visits versus 36% at chains); and loyalty program enrollment, which correlates with a 22-point NPS increase among your customers.

Quality and Trust: The Largest Vulnerability for Chains, the Strongest Card for Dealers

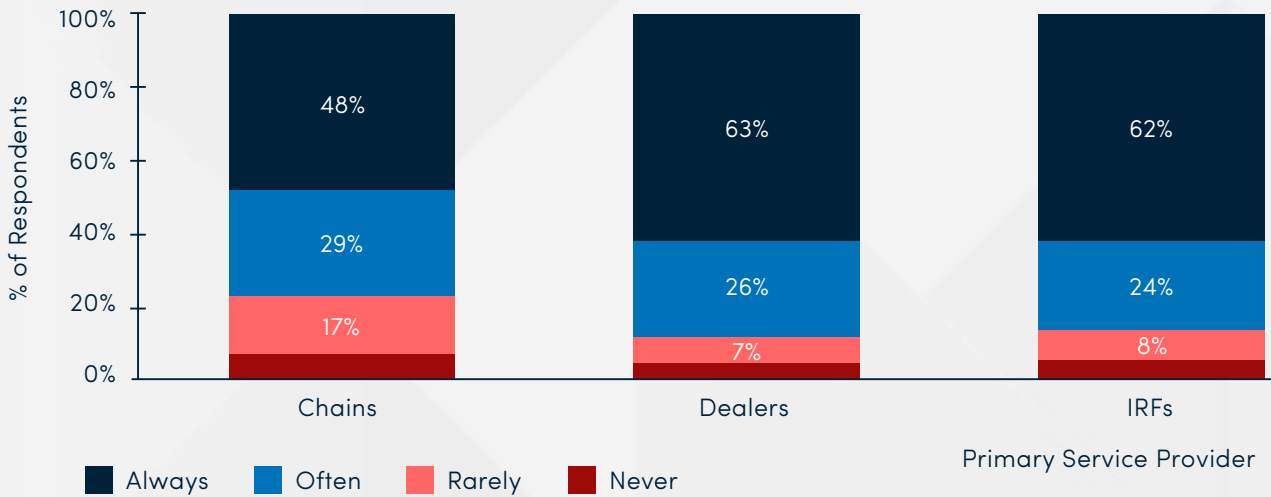
Dealers lead on perceived quality, but the margin is thinner than reputation suggests.

On work quality, 77% of respondents rate dealers as good or better, with IRFs at 75% and chains at 68%. The trust picture is similar: 70% trust dealers, 66% trust IRFs, and 61% trust chains. The dealer advantage is real but narrow.

The data tells a sharper story.

The CSS asked repair customers how often providers successfully repaired the original problem on the first visit. 89% of dealer customers said their vehicle was always or often fixed right the first time (FRFT). IRFs were close behind at 87%, while only 77% of chain customers reported the same.

After going to your primary service provider and the service is completed, how often is your original issue fixed?



12 pts

FRFT gap: 89% of dealer customers fixed right first time vs. 77% at chains

That 12-point gap is one of the most important quality results in this survey

Poor repair performance drives poor quality perceptions, and the biggest driver of customer defection due to repair quality is a return trip for the same repair. This is a major reason chains struggle to retain customers. The 17-point NPS drop among non-loyal chain visitors is partly a story about trial customers whose first repair did not hold. For chains, this is an execution issue that requires a commitment to technician training and retention.

IRFs post an 87% always-or-often FRFT rate without OEM parts networks, national training programs, or brand-backed quality certifications.

Their advantage is workforce stability and a technician base that builds mastery through tenure, not scale. For chains investing in quality improvement, the IRF model suggests that retaining skilled technicians matters more than adding new ones.

Service advisors drive the perception.

The service advisor is the most influential position in the service operation for both actual and perceived quality. When the customer rates their service employee experience as “very satisfied,” average NPS is 95. When rated as “satisfied,” it is 82. When “somewhat satisfied,” the average score drops to 27 and becomes negative from there.

Technician videos offer a quality signal that almost nobody is using.

Customers who received a video from the technician report meaningfully higher trust (74%), satisfaction (67%), and likelihood to schedule additional service (72%). Yet adoption is low across the board: 28% at chains, 22% at dealers, and 8% at IRFs.

74% vs 22%

Share of customers reporting higher trust after receiving a technician video, vs. share of dealer customers who actually receive one.

Chains:

The 12-point FRFT gap (77% versus 89% at dealers) is your most pressing competitive liability. IRFs nearly match dealers at 87% without OEM parts infrastructure or brand backing, proof that the gap is closable. Closing it requires investment in technician training and retention, not communication programs. Technician videos increase trust (74% of recipients report higher trust), but focus on perception rather than execution. Get the repair right on the first visit. Volume will not outrun a quality deficit.

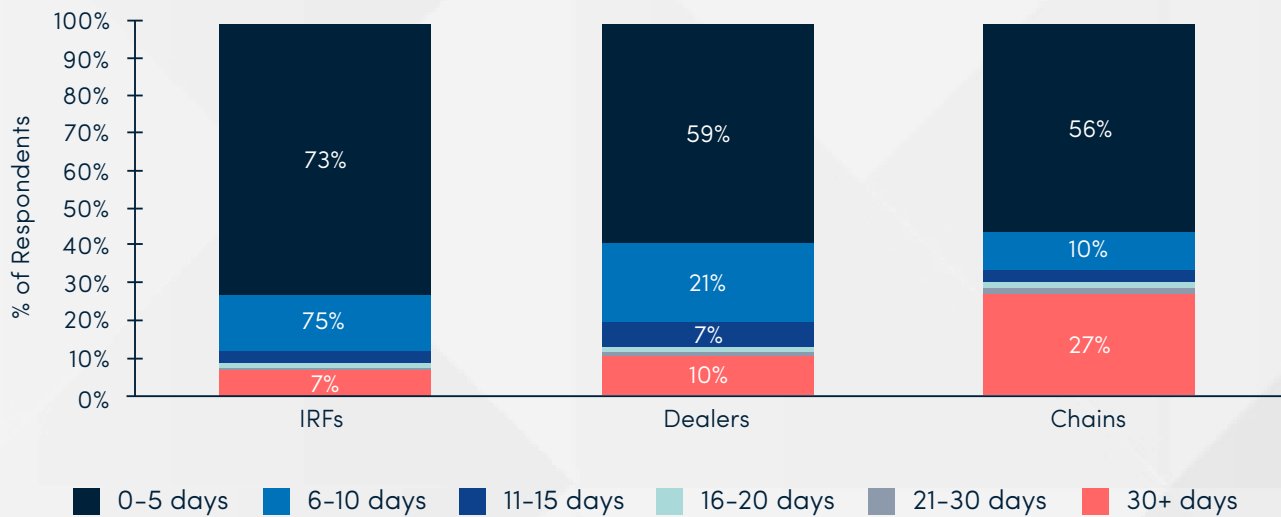
Dealers:

FRFT is your strongest competitive differentiator and your least visible one. At 89% versus 77% at chains, this is an outcome-based advantage that most customers never hear about. Put it at the center of how you communicate value: in service lane signage, in advisor conversations, and in post-service follow-ups. Technician videos are one tool. 74% of customers who receive one report higher trust, yet only 22% of your customers get one. Adoption alone would close the perception gap without changing a single operational metric.

Convenience: Chains Win on Access, Lose on Execution

Convenience covers several distinct factors: how long the consumer has to wait for a visit, how the visit is scheduled, how long they have to wait while parts are ordered, and how close the supplier is to their home. Chains come out ahead on some of those elements, but they lag on others. The overall convenience story is not as simple as “chains are more convenient.”

For your most recent appointment, from scheduling to the date of your appointment, how many days did you wait?



The channel known for walk-in convenience has the longest wait times.

IRFs lead the industry, with 73% of customers waiting five days or less for their most recent visit. Dealers come next at 59%, and chains trail at 56%.

And chain customers are the most likely to defect as a result. 29% have switched providers due to poor appointment availability, versus 21% at dealers and 20% at IRFs. When they do switch, they overwhelmingly go to another chain (34%), almost never to a dealer (5%). Defection stays within the non-dealer universe. Chains are losing customers to other chains.

29%

of chain customers have switched providers due to poor appointment availability

Chains:

29% of your customers have switched providers due to poor appointment availability, 40% higher than dealers or IRFs. When they leave, they go to another chain (34%) or an IRF (7%), almost never to a dealer (5%). This is a staffing and scheduling problem, not a capital investment issue. Audit capacity utilization at your highest-churn locations, adjust staffing to demand patterns, and reduce the gap between when a customer wants an appointment and when one is available. This removes the single most common reason your customers leave.

Dealers:

Appointment availability is not your primary vulnerability today. Your customers schedule ahead and accept longer waits as part of the dealer relationship. The risk is that this acceptance is a habit, not a preference. Monitor chain improvements here, as any meaningful reduction in chain wait times puts incremental pressure on your base.

Scheduling behavior: Walk-in reliance is a chain vulnerability often misread as a convenience feature.

Chain customers are much more likely to walk in for light maintenance: 39%, compared to 33% at IRFs and 15% at dealers. Walk-in rates drop across all channels for heavy maintenance.

Walk-in activity drives volume volatility, which, in turn, directly impacts the customer experience.

Our 2023 CSS found that NPS declines as the number of scheduling problems increases. Unpredictable volume equates to longer in-bay wait times, variable service time, and disappointed customers: an operational issue that extends to a retention issue.

Chain customers who book appointments ahead of time are more likely to favor walk-in and mobile app scheduling than dealer and IRF customers. Dealer customers are the most likely to favor online scheduling at 29% of those surveyed.

Next Generation Capture:

In the 18 to 24 age group, phone booking is still most popular (42%), but online (28%) and app (11%) are close behind. Seniors 65 and older book by phone 66% of the time. Younger drivers spread their booking across channels in a way seniors do not, and providers that offer only phone booking are increasingly invisible to first-time service customers.

Chains:

Walk-in reliance at 39% (versus 15% at dealers) creates throughput variability that directly pressures NPS. Shift customers toward scheduled visits through three channels: standardized digital scheduling (your national scale is an advantage here), app-based booking (13% of 25-34-year-olds already prefer it), and in-person scheduling at the point of service. Each scheduled visit you convert from a walk-in reduces variability and improves the experience for every other customer in the bay.

Dealers:

Your customers schedule in advance, which protects throughput and insulates the experience from scheduling-driven NPS drag. The competitive risk is that chain schedulers are standardized nationally and increasingly optimized, while dealer scheduling systems vary widely across rooftops. Evaluate whether your current scheduling tools match the consistency your customers experience at chains.

Dealer customers experience fewer parts-related delays in the service bay: 38%, versus 45% at chains and 43% at IRFs.

Dealers' access to OEM parts in their supply chain likely plays a role here, as does the fact that they predominantly service only one brand, which allows them to keep parts in stock.

On the service side, parts delays have little effect on the typical oil-change or tire-rotation visit. They do have an impact on in-bay repair jobs, which is where a chain can really increase revenue. The difference is more important to chains that want to increase sales beyond oil changes and tire rotations.

Chains:

Parts delays affect 45% of your service visits versus 38% at dealers. For routine oil changes and tire rotations, this rarely changes the customer experience. For complex repairs, the category where your revenue growth and margin expansion opportunities are greatest, in-bay delays are a direct obstacle. Invest in parts sourcing partnerships and inventory management at locations where you are actively expanding your repair mix.

Dealers:

OEM parts access gives you a structural in-bay advantage: 38% parts delay rate versus 45% at chains. Most customers do not consciously recognize this advantage, but they directly experience it. Make it visible, particularly to newer-vehicle owners who have already experienced a parts delay at a competitor. This is a retention message, not a marketing message: it belongs in the service lane, not in an ad.

When asked why they would not choose a particular dealer even when prices are equal, respondents cited price markups (38%) and location (35%) as the top reasons.

Distance is the most commonly cited convenience factor for dealers, and it is also the factor that dealers can do the least about.

Chains and IRFs are both closer to where customers live and work. When it comes to maintenance, customers will generally select the closest service provider they are willing to do business with. However, IRFs have the same locational advantage while enjoying higher FRFT rates and stronger NPS across all customers. Convenience brings customers in. Quality keeps them coming back.

Chains:

Proximity is your structural moat for routine maintenance and is largely unassailable. The risk is assuming it is sufficient. IRFs share that locational advantage while posting near-dealer FRFT rates (87% always or often) and the highest NPS of any channel (57). Convenience gets customers through the door; FRFT keeps them. If your quality metrics do not improve alongside your location count, proximity becomes a revolving door.

Dealers:

Distance is your most-cited barrier and largely a fixed constraint. The more tractable opportunity is targeted outreach to customers who are geographically close but not returning after their first few service visits.



Summary of Market Factors

No one factor explains the swing from dealers to chains. But when we step back and look at the full picture, the trend is unmistakable. Structural and operational factors are stacking in the same direction and at the same time.

Structurally, an aging parc is eroding the dealer's addressable market, and the EV advantage dealers hold is real but not exclusive. EV market growth is slower than expected but still strongly positive, and chains and IRFs will close the capability gap over time. Operationally, chains

are benefiting from lower prices, increased penetration, and dramatically improved satisfaction, creating an advantage that is making their gains structural, not cyclical. But chains are not escaping: a 12-point FRFT gap, a 17-point NPS decline among non-loyal customers, and 29% of customers switching due to poor appointment availability are all warning signs that growth is outpacing the operational capacity to sustain it.

The threats facing each channel are different, but no less pressing.



Factor	Chains	Dealers
Vehicle Age	Conquest opportunity. Target the 4-7 year vehicle owners leaving the dealer.	Structural headwind. Even sub-eight-year vehicle owners are choosing dealers 20 points less than in 2020.
Electrification	Window to invest is narrowing. EV share is increasing, but the lead time to build capability is shrinking.	EV market growth is slower than expected but still strongly positive. EV owners choose dealers more often, and the market is not yet saturated with capable service providers.
Customer Satisfaction (NPS)	PSP NPS of 56 is strong. All-customer NPS of 39 signals a retention problem masked by volume.	Lowest PSP NPS at 49. Narrowest PSP-to-all-customer gap suggests a consistent but underwhelming experience.
Price	Clear advantage. Customers spend 56% more at dealers. But 42% of chain customers are delaying the service they need.	Perception and reality problem. Prices up 82% since 2016 vs. 31% CPI. Twice as likely to be seen as expensive.
Quality and Trust	Largest vulnerability. 77% always-or-often FRFT vs. 89% at dealers. The 12-point gap is the most material quality finding in this survey.	Strongest card. FRFT and perceived quality lead all channels. Least marketed advantage.
Convenience: Availability	Highest switching risk. 29% of chain customers have left over poor appointment availability.	Not a primary vulnerability today. Monitor chain improvement here.
Convenience: Scheduling	39% walk-in rate creates throughput variability and NPS drag.	Scheduling discipline protects experience. Risk is falling behind on digital tools.
Convenience: Parts	45% report parts delays vs. 38% at dealers. Limits growth into higher-margin repair work.	OEM parts access is a structural advantage most customers experience, but few recognize.
Convenience: Location	Proximity is the structural moat for routine maintenance.	Distance is the most-cited barrier. Largely a fixed constraint.

A note on independent repair facilities.

IRFs consistently outperform on quality and satisfaction: the highest NPS of any channel (57), an 87% FRFT rate just below dealers, the shortest wait times, and the longest customer tenure. Yet their primary provider share slipped from 26% to 23% since 2020. Strong fundamentals are not translating into growth.

The explanation comes down to scale, not quality. IRFs operate as individual businesses without the centralized business processes, systems, or marketing infrastructure that allow

chains to add locations at marginal cost. Going from one location to two requires payroll systems, property management, and a second manager, which is an exponentially harder step than going from ten to eleven. IRFs win on relationship and proximity, but the operational foundation that drives chain growth does not exist at the single-location level. That same independence is what makes their service quality so high. The question for the industry is whether that quality can survive consolidation.





Looking Ahead

The story of dealers losing share to chains is not one of a single trend with a single driver. Rather, it is a series of structural and performance drivers piling on top of each other and all pointing in the same direction at the same time. We do not see any signs of it abating in the data. Yet the exact nature of the threat varies by channel, as does the appropriate response.

Growth Without Retention vs. Quality Without Visibility

Chains are gaining on acquisition and struggling with retention.

People are coming in, but the 17-point NPS drop among non-loyal visitors means they are not returning. Price and convenience got them in the door. FRFT and wait times are driving them back out. Share leadership based on volume will persist only as long as chains can retain trial visits as repeat customers.

Dealerships are winning on quality and losing on perception.

FRFT is the best in the industry. The primary provider-to-all-customer NPS differential is the smallest of any channel. However, the price trend, 82% since 2016 versus 31% CPI, is exacerbating the retention falloff, and those defections go far beyond mature models. Dealerships' best assets are the ones customers never lay eyes on.

For chains, the priority is to translate share gains into lasting customer loyalty before the quality and retention gap becomes a competitive vulnerability. For dealers, it is to interrupt the self-reinforcing cycle of price increases and volume loss by telling the story of the value they already provide, beginning with industry-leading quality metrics.

Emerging Strategies

This report's data indicates that there is still room for optimization within the current competitive landscape. But three strategies exist outside this landscape, things that have not been tried by any of the large competitors but that might be worth trying.

● **Develop a value offering to prevent price-based defection.**

The most direct way to stop defection is to remove the reason customers leave. Dealers could offer a tiered service model, similar to airline ticket classes, where a "value" option uses second-line parts and a longer turnaround while a "full" tier preserves the premium experience. Reverse surge pricing on idle bays is another lever: lower margins beat zero revenue from an empty lift. Both strategies let dealers move down-market without diluting the brand, because the customer chooses the tier. For chains, the logic works in reverse: a premium tier with guaranteed turnaround and OEM-equivalent parts captures the dealer defector who still wants an elevated experience.

● **Use AI to predict, not just react.**

Data on customer transactions and service interactions already reside at the customer level. If AI models can identify which customer is most likely to defect, the models can also prompt intervention before the customer decides to leave, not after they have already defected to another provider.

● **Acquire what you cannot build.**

A dealer group that purchases an independent shop buys the people, the customers, the facility, and the quality of culture that this report suggests is best in class. The relationship, equity, and service culture transfer with the business

Together, these strategies form a comprehensive response: make customers not even consider leaving, identify the ones who might, and own the alternatives for those who do.

What Comes Next

The 2026 CSS will focus on the youngest cohort of vehicle owners, consumers setting their own service preferences for the first time. This year's data raises three questions we intend to answer. First, as EV adoption continues, who captures the service business for young EV owners, and what determines that choice? Second, younger consumers are overwhelmingly chain-loyal today. What does that mean for dealer viability over the next decade if the pattern holds? And third, how do first-fix-right rates and technician workforce stability differ when the customer is new to the service experience entirely?

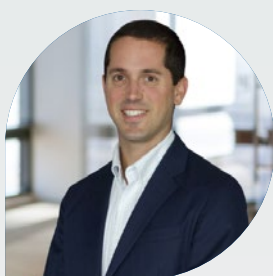
We will continue to track the broader market dynamics covered in this report while going deeper on the generation that will define the next era of automotive service.

About the Authors



Abey Abraham, Managing Principal

Abey is a Managing Principal at Ducker Carlisle, where he leads the firm's automotive and materials practice, specializing in transportation, mobility, and electrification. Abey holds a Bachelor of Science in Psychology from Michigan State University. He has over 15 years of experience in the automotive materials space, with deep expertise in lightweighting, materials substitution, joining technologies, and metallic and non-metallic materials. Abey advises clients on organic and inorganic growth strategies to address dynamic mobility and lightweighting trends and their supply chain implications. He serves as President of the Society of Automotive Analysts, sits on the editorial advisory board for Lightweighting World Magazine, and is an active member of the Society of Automotive Engineers.



Nate Chenenko, Principal

Nate is a Principal at Ducker Carlisle, where he co-leads the North American and European Parts Benchmarks with a focus on Ducker Carlisle's Insights practice. Nate holds a dual bachelor's degree in Economics and Political Science from the University of Rochester. He has been with the firm since 2012, bringing experience across a wide range of consulting and benchmarking engagements, including warranty legislation benchmarking, OEM contact center operations, pricing strategy, and pricing research management. Nate serves as the firm's subject matter expert on mobility topics including autonomous, shared, and electric vehicles, and leads Ducker Carlisle's research on Uptime — studying how manufacturers across multiple sectors maximize fleet operability. Prior to joining Ducker Carlisle, Nate supported process improvements on information technology systems for the US Government.



Gene Metheny, Managing Principal

Gene is a Managing Principal at Ducker Carlisle, where he leads the firm's global price consulting practice. Gene holds a BS in Electrical Engineering from the University of Missouri at Rolla and an MS in Business Administration from Northeastern University. He has 18 years of pricing experience spanning price positioning, channel strategy, and incentives, as well as expertise in price determination software implementation and process transformation. Gene has extensive knowledge of supply chain, including network design, inventory management, warehouse operations, and manufacturing efficiency, and has completed multiple ERP implementations. Prior to joining Ducker Carlisle, Gene led the automotive aftermarket practice at Ernst & Young and began his career at General Electric, where he worked across six business units covering procurement, manufacturing, engineering, and materials management.



Kurt Ranka, Managing Principal

Kurt is a Managing Principal in Ducker Carlisle's Automotive and Industrials strategic solutions practice, where he focuses on aftermarket revenue management, price optimization, and supply chain improvement. Kurt holds a bachelor's degree in Economics and Management from Albion College and a master's degree in Industrial and Manufacturing Systems Engineering from the University of Michigan-Dearborn. He has 20 years of consulting experience serving automotive and industrials clients across pricing strategy, business case development, implementation, and B2B and B2C pricing optimization across diverse channel structures. Kurt has led numerous aftermarket operations and supply chain improvement engagements and has authored industry research and thought leadership for industrials clients.



Kyle Spencer, Senior Consultant

Kyle is a Senior Consultant on Ducker Carlisle's Insights Team, where he supports benchmark programs and research initiatives focused on motor vehicle parts, service, dealer operations, and aftersales performance. Kyle holds a bachelor's degree in Marketing and Global Business from Cedarville University. He develops research outputs and conference-ready materials for Ducker Carlisle's benchmark programs, including the North American Parts Benchmark (NAPB), North American Service Benchmark (NASB), and Electric Vehicle Aftersales Benchmark (EVAB). Kyle synthesizes quantitative and qualitative market inputs into actionable insights on competitive positioning, market trends, and growth opportunities, and supports custom consulting work on topics including service lane technology.

The retention shift is structural. The response requires a strategy built for your network.

Contact the Ducker Carlisle Automotive practice at

automotive@duckercarlisle.com

About Ducker Carlisle

Named one of America's Top Management Consulting Firms 2026 by Business Insider, Ducker Carlisle is a global market research, strategy consulting and M&A advisory firm that helps the world's largest companies and private equity firms optimize business performance and accelerate growth. Founded in 1961 with offices across the US, Germany, France, UK, India and China, the firm leverages proprietary data, deep industry knowledge and proven methodologies to deliver tailored, industry-specific insights and recommendations across the automotive, heavy truck & equipment, general industrial, building and construction, and private equity sectors.

For more information, visit DuckerCarlisle.com | [LinkedIn](#)



Corporate headquarters:

1250 Maplelawn Drive
Troy, MI 48084

+1.800.929.0086

This document has been prepared by DC.

The contents of this document do not constitute any form of commitment or recommendation on the part of DC at the date of their preparation.

© Ducker Carlisle LLC 2026.

All rights reserved.

No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying or otherwise without the written permission of Ducker Carlisle.