

State of the Market Report

Automotive Repair Shop Owners and DIFM Customers

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The State of the Market of Automotive Repair Shop Owners and DIFM Customers

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Introduction

The needs of DIFM (“do it for me”) customers are growing as vehicles become more advanced and complex. What marketing strategies and services offered are working the best for shop owners? What else do DIFM customers want from their repair shops?

In May of 2025, in partnership with AutoZone, Endeavor Business Intelligence surveyed 300 automobile repair shop owners and 1,000 DIFM customers who have had their vehicle repaired by an automotive repair shop in the last 12 months.

This survey collected data on how DIFM customers respond to specific marketing strategies, the services they look for in a shop, and their overall satisfaction. The findings also show shop owners' current marketing plans and their effectiveness.



1 Consistency, Integrity, and Competitive Pricing

DIFM customers are more likely to return to businesses they trust, especially when it comes to high-cost services like automotive repair. DIFM customers also want assurance that their vehicle is being repaired efficiently and correctly the first time. When customers were asked which factors would most influence their decision when choosing a shop, 47% of DIFM customers cited customer service as extremely important. This ranked significantly higher than factors such as speed of service or convenient hours of operation. The data suggests that DIFM customers are willing to wait longer for a service or even work around their own schedule to ensure they receive top-quality automotive service.

Naturally, customers will always be conscious of pricing, especially when a vehicle needs more than a routine service or repair. DIFM customers consistently rated shops offering competitive pricing favorably. When asked what factors they considered important when choosing an auto repair shop, customers ranked the cost of repair as their top priority.

47% cited customer service as extremely important.

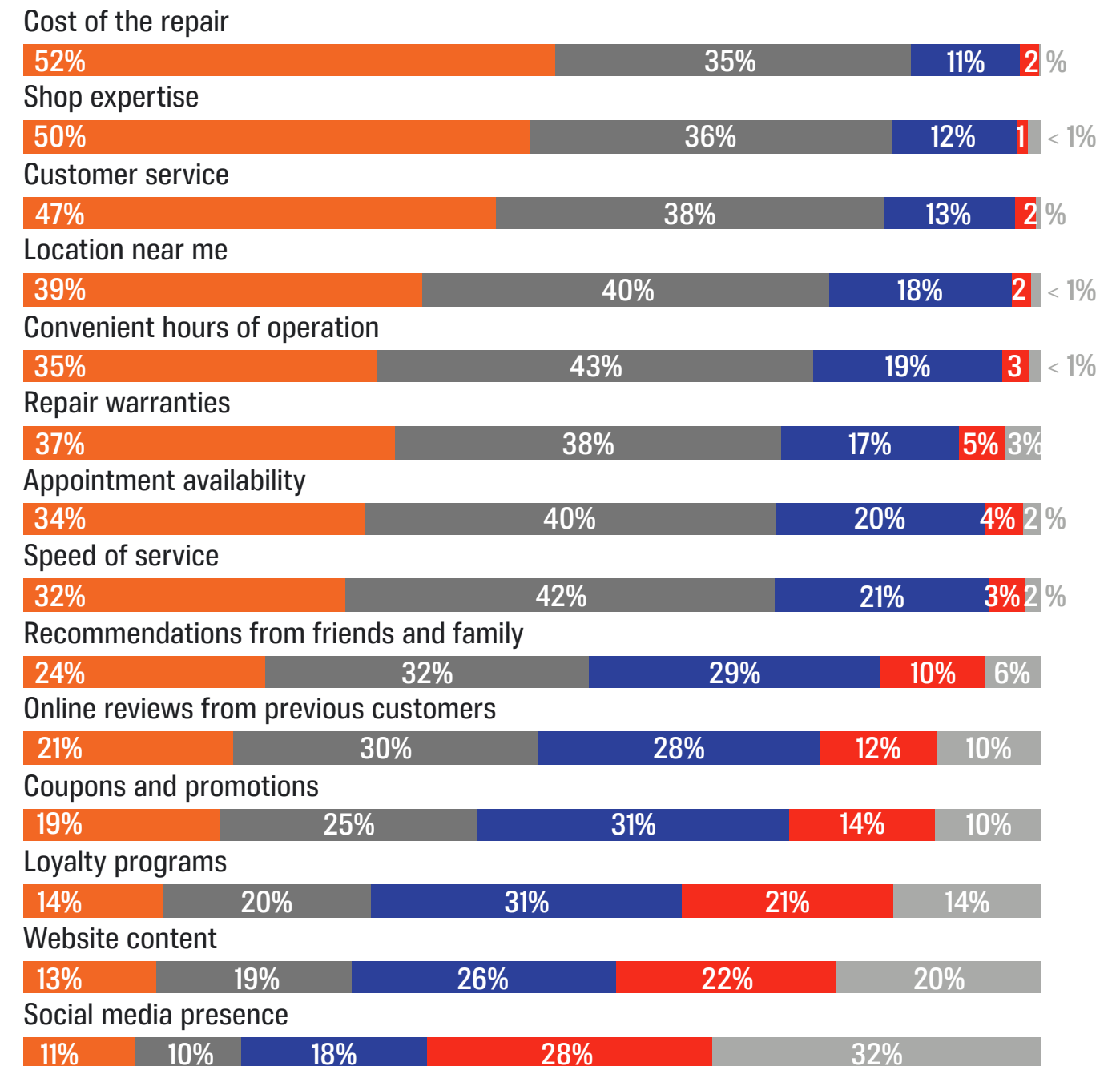


2 Technical Services and Customer Experience

Same-day service is a major selling point for DIFM customers choosing a repair shop, with 79% saying it makes them more likely or much more likely to visit. However, meeting this demand remains a challenge, as only 31% of shops are currently able to complete services within a single day. This highlights opportunities for shops to improve customer satisfaction and gain a competitive edge. This is one example of how shops can elevate the customer experience and ultimately convert more quotes into repair orders. DIFM customers are looking for a shop that has the expertise to fix their vehicle with confidence. Eighty-six percent of survey respondents reported that shop expertise was very or extremely important to them when deciding where to have their vehicle serviced. It is understandable why there is such an overwhelming draw to that selected response. DIFM customers want to know that their vehicle is repaired to the highest standards possible, and experienced technicians can provide that reassurance.



When your vehicle needs service, what factors are important in deciding where you chose to have the service done?



Consumers n=1,015

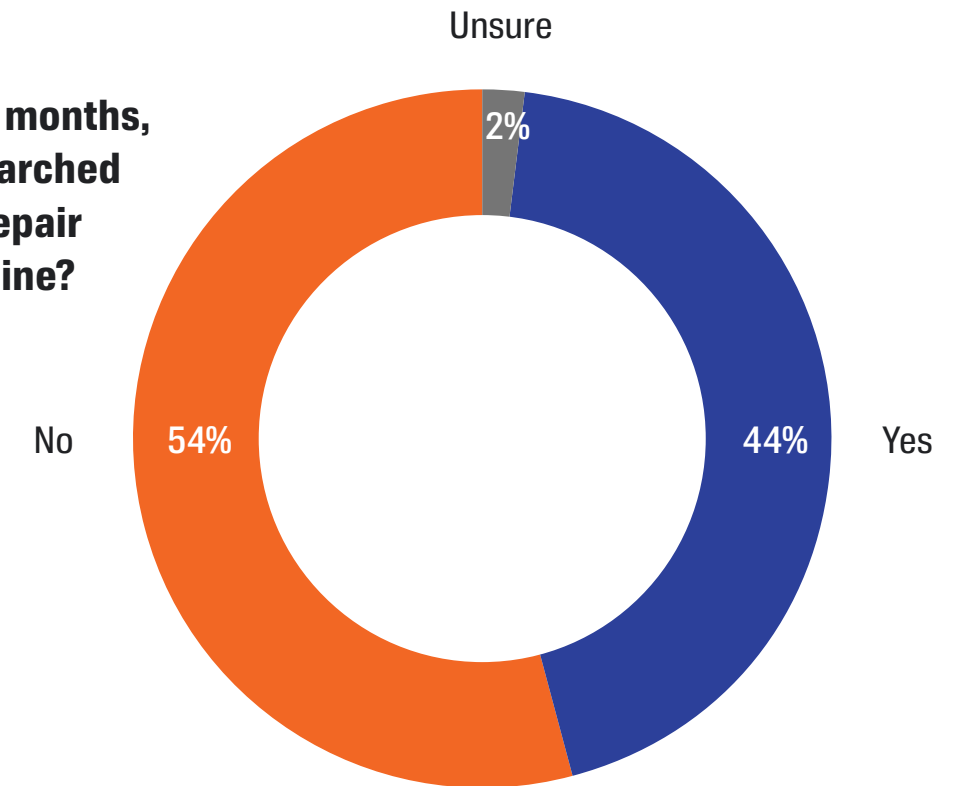
3 Traditional Marketing Methods

Shop owners overwhelmingly preferred traditional forms of marketing over more modern options, such as social media or online presence. Shop owners currently rely on word of mouth more than any other form of paid advertisement. DIFM customers, however, are currently viewing more content online, such as YouTube advertisements, Google Ads, and social media posts from shops. When asked where they had seen advertisements for automotive repair shops in the last 12 months, 24% of DIFM customers replied that they had seen local advertisements, such as flyers. The data shows that shop owners have various methods to reach DIFM customers, and if possible, they should do so with a multiple-channel approach.

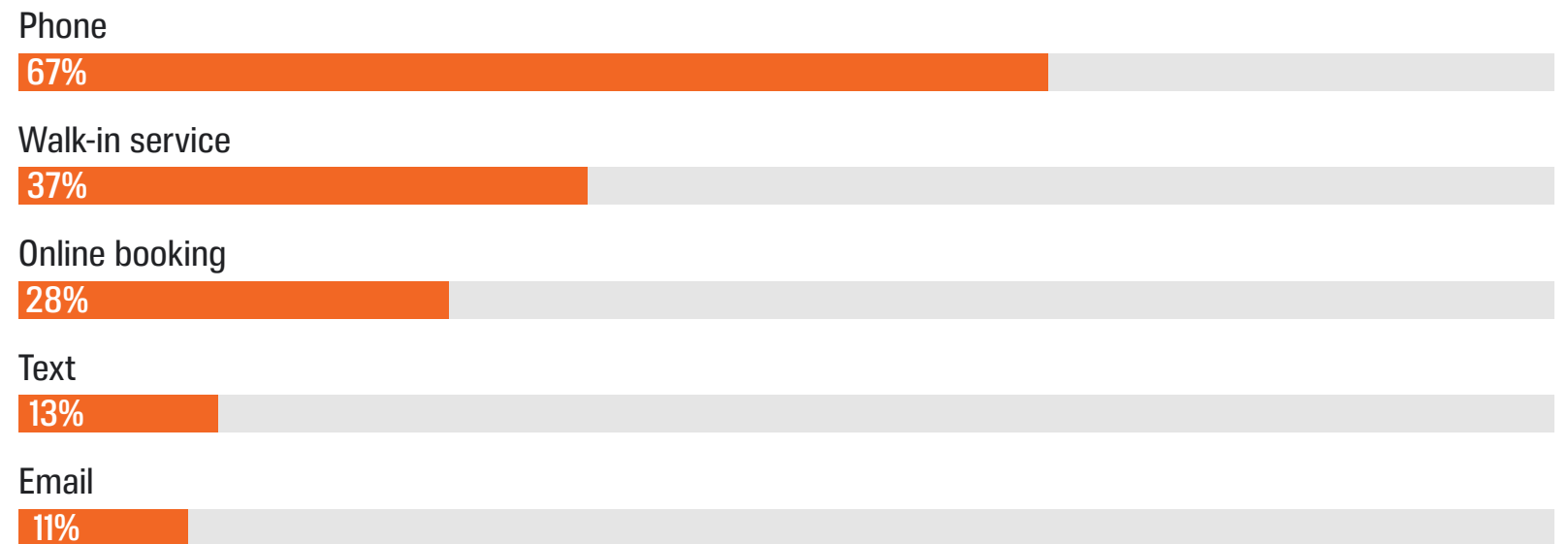
24% of DIFM customers replied that they had seen local advertisements.

Shop owners should not overlook the potential of online advertising, as it reaches a segment of DIFM customers. In addition to seeing advertisements on various online platforms, 44% of the surveyed DIFM customers reported searching for automotive repair services online in the last 12 months. Creating a solid online presence can be the difference between a DIFM customer choosing one shop over another to service their vehicle.

In the past 12 months, have you searched for auto repair shops online?



How do you prefer to make service appointments for your auto repairs?



Consumers n=1,015

Average number of responses = 1.6

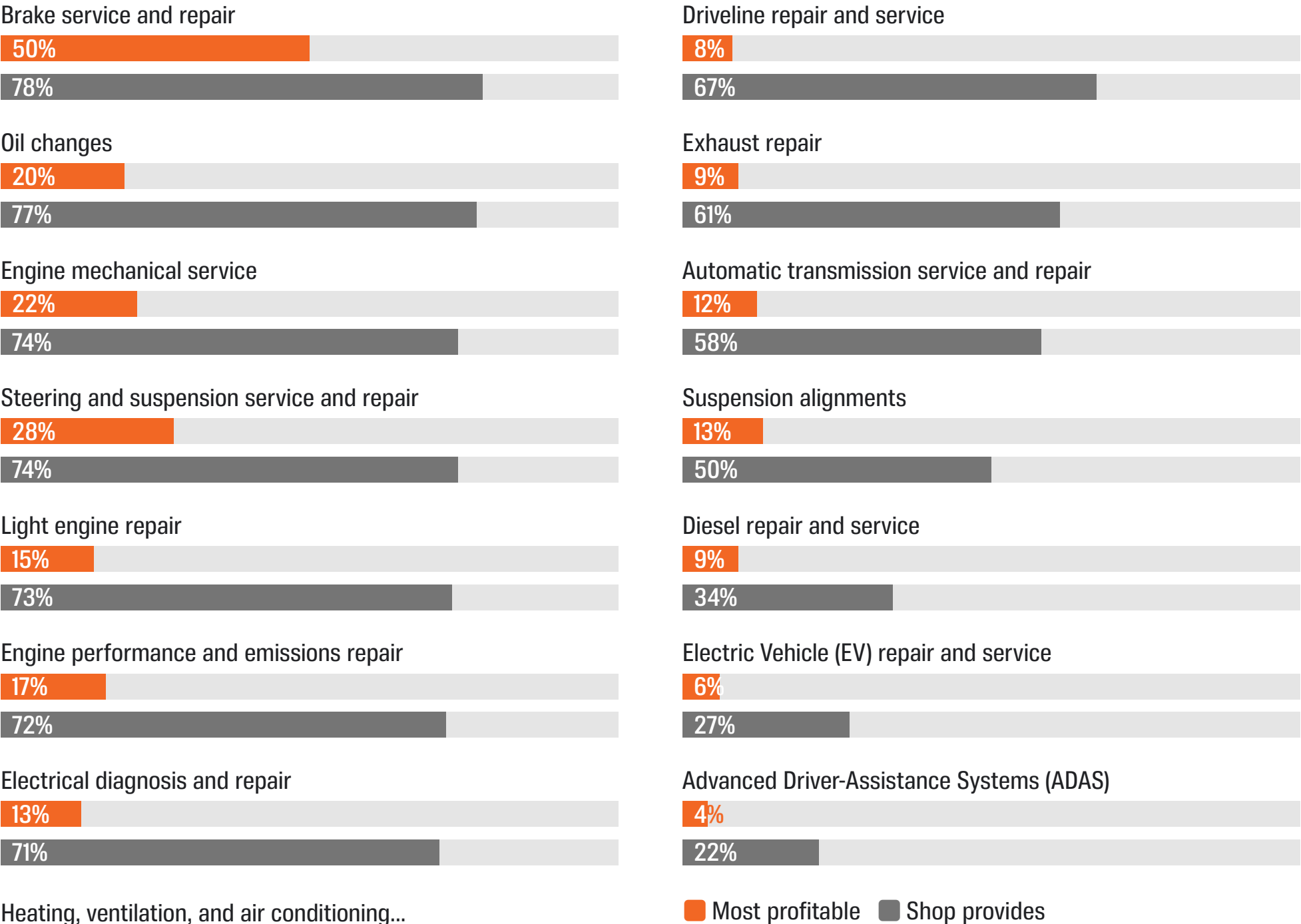
Shop Services Offered to DIFM Customers

Balancing DIFM Customer Demands and Shop Growth

Shop owners are part of an aging demographic, and keeping up with the needs of their customers, employees, and businesses poses challenges for them. Forty-six percent of shop owners reported that they were over the age of 51. Sixty-nine percent of the shop owners who responded also took a direct role in planning their shop's marketing strategy. This creates a challenge for owners as they must determine where to dedicate their time, and customer service should always be a priority. To compound that, 20% of shop owners also actively take on the role of technician in the shop. While performing two or three different roles within a day keeps a shop owner experienced, it is not sustainable in the long term.

Approximately half of the shop owners surveyed identified brake service as the most profitable aspect of their business. Twenty-eight percent pointed to steering and suspension services, and 24% considered heating, ventilation, and air conditioning (HVAC) repairs to be their top profit leaders. Brake service was also the most frequently reported service area by shop owners.

Shop owners were asked: Which of the following services does your shop provide? And which (3) of the following services do you feel are most profitable for your shop?



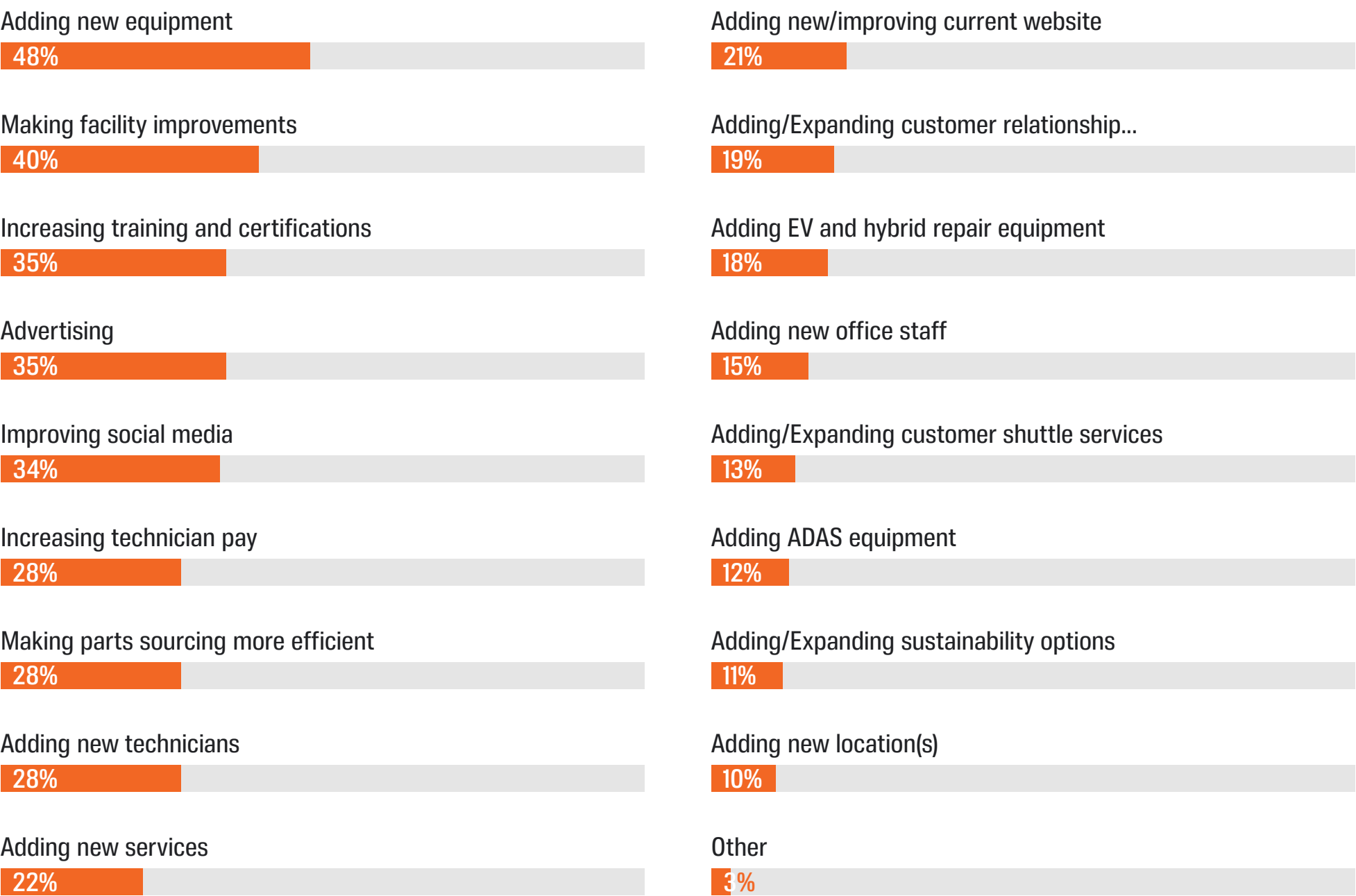
Owners n=302
Average number of responses = 9.1 shop provides
Average number of responses = 2.5 most profitable services

There is a lack of specialty services being offered at automotive repair shops, with all three ranked the lowest possible when shop owners were asked which services their shop had available. Only 34% of shops report offering diesel repair and service, 27% offer electric vehicle (EV) service, and 22% offer advanced driver assistance systems (ADAS). This directly correlates with how shop owners rank the profitability of these services. All three are rated the lowest possible in terms of shop profitability as well, with only 9% considering diesel repair, 6% for EV, and 4% for ADAS, which is the most profitable option.

It is important to remember that this is the perception of the survey respondents, and the true profitability of these services will be assessed as they evolve over time. It doesn't appear that owners have a plan to offer specialty services, such as EV and ADAS repairs, in the future. Fifty-seven percent of shop owners reported investing money in facility improvements to improve their businesses, but only 12% are investing in EV equipment, while only 7% are investing in ADAS calibration systems. Shop owner sentiment around emerging technologies is generally negative, with shops being slow to adapt to features that are gaining traction with DIFM customers.

More traditional investments, as seen in the breakdown to the right, like new equipment, facility improvements, and training and certifications remain the biggest areas owners put money back into their shops.

What investments are you currently making to grow your shop?



Owners n=302
Average number of responses=4.2

DIFM Customer Values and Opinions

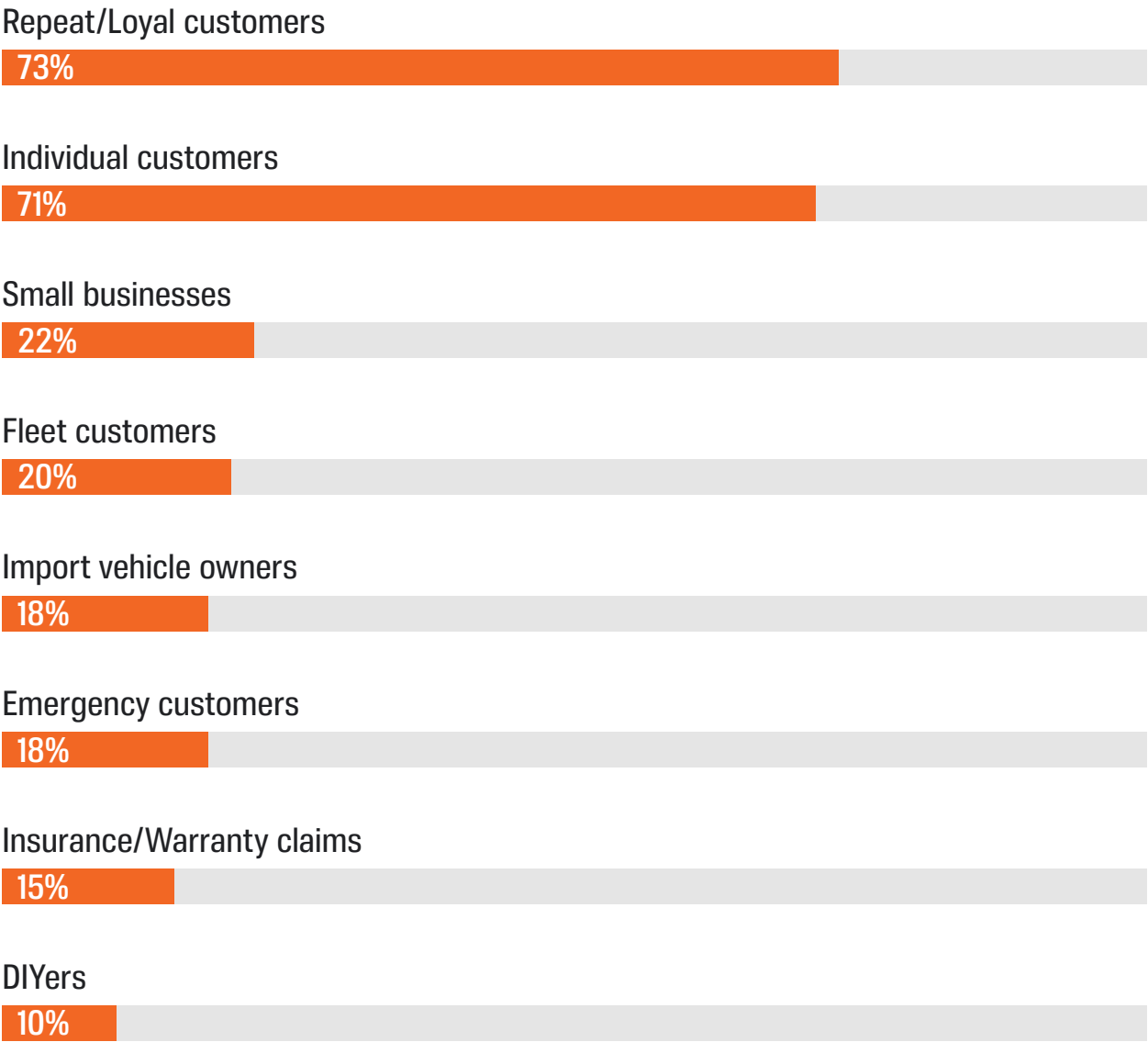
Customer Satisfaction and Loyalty

Data shows most customers currently enjoy the experience they receive from their repair shop. Almost all customers who took the survey reported having a positive experience with their current repair shop, with 42% of DIFM customers describing themselves as “very satisfied” and 45% as “extremely satisfied.” Forty-one percent of DIFM customers reported choosing a shop for non-routine repairs because they have already used that shop before. Shop owners are relying on that loyalty as much as they can — 73% of shop owners consider their primary customers to be repeat or loyal customers. This aligns with shop owners’ trust in word-of-mouth marketing and the fact that loyal, repeat customers are a primary source of income.

How satisfied were you with the last repair service you had completed at a shop?



What is your shop’s primary customer type?



Owners n=302
Average number of responses=2.5

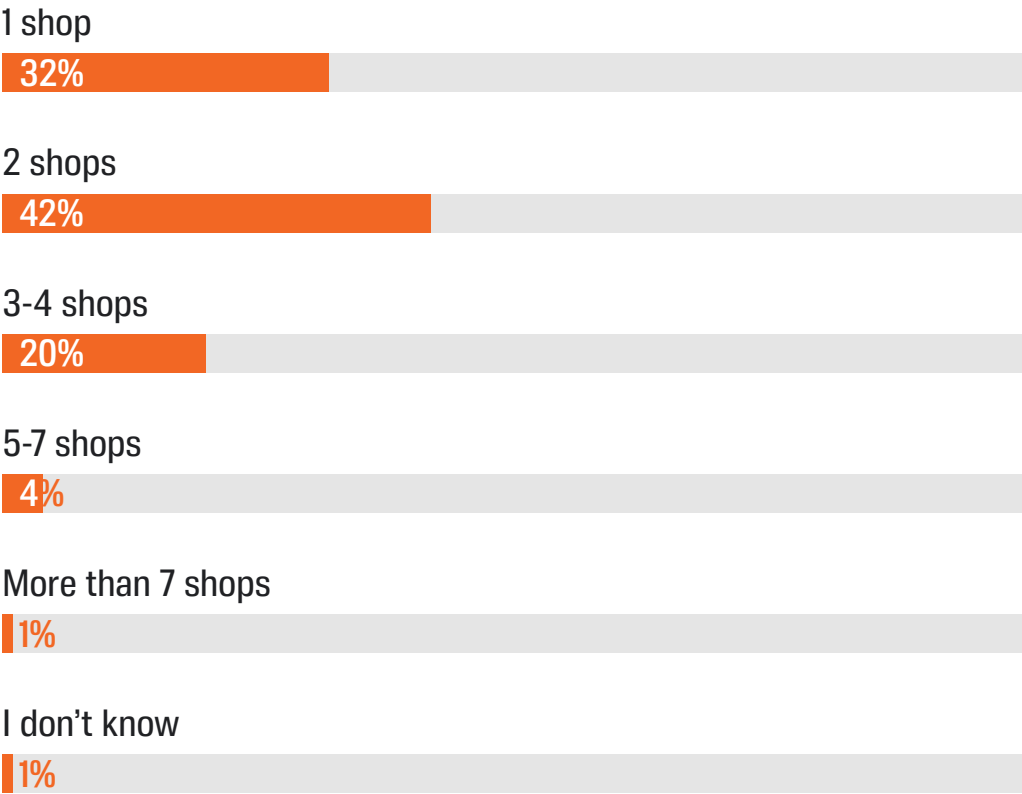
73% of shop owners consider their primary customers to be repeat or loyal customers.

Customers Willing to Look Elsewhere

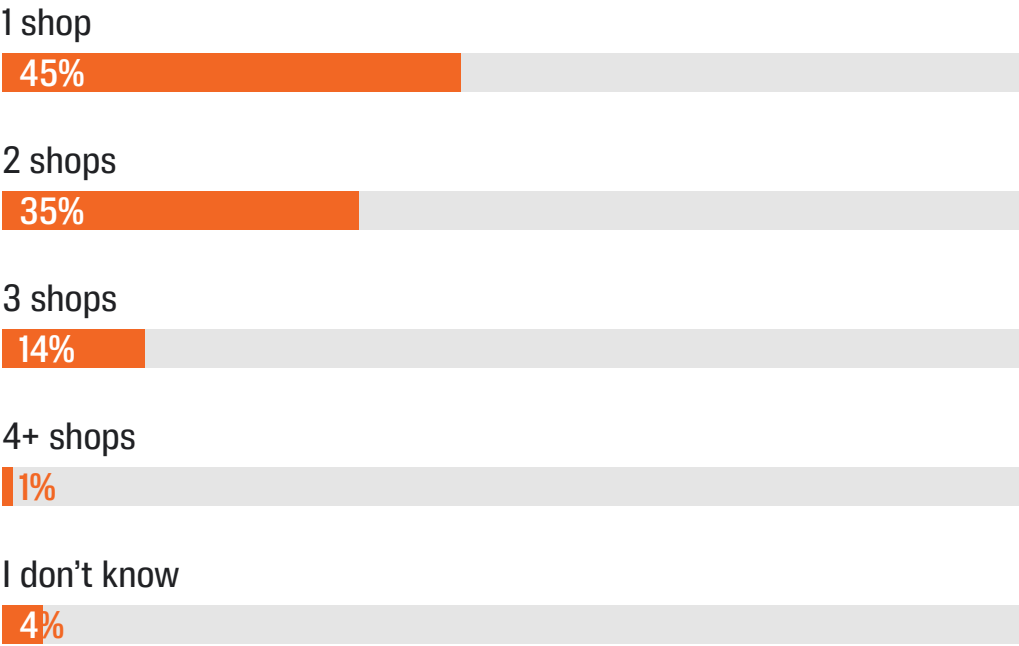
While shop owners view repeat and loyal customers as their primary customer base, many DIFM customers are open to servicing their vehicles at different shops within a specified period. Forty-two percent of DIFM customers used two different shops within the last two years, while 20% used three to four different shops. Over 60% of DIFM customers were willing to try a competitor out within two years of each other. This creates a unique set of challenges for shop owners, especially when they rely so heavily on repeat customers.

There were several reasons that DIFM customers reported trying different shops. A combination of factors pushes customers to use multiple shops within a few years. When DIFM customers were asked why they chose one shop over another, 49% of respondents cited the lowest price quote as their reason. This, coupled with the fact that 84% of DIFM customers consider getting a second quote for vehicle repairs, creates an environment where customers often visit multiple repair shops in a short period.

How many auto repair shops have you used in the past 3 years?



When you have a non-routine service need, how many shops do you typically request a service estimate from?



Consumers n=1,015

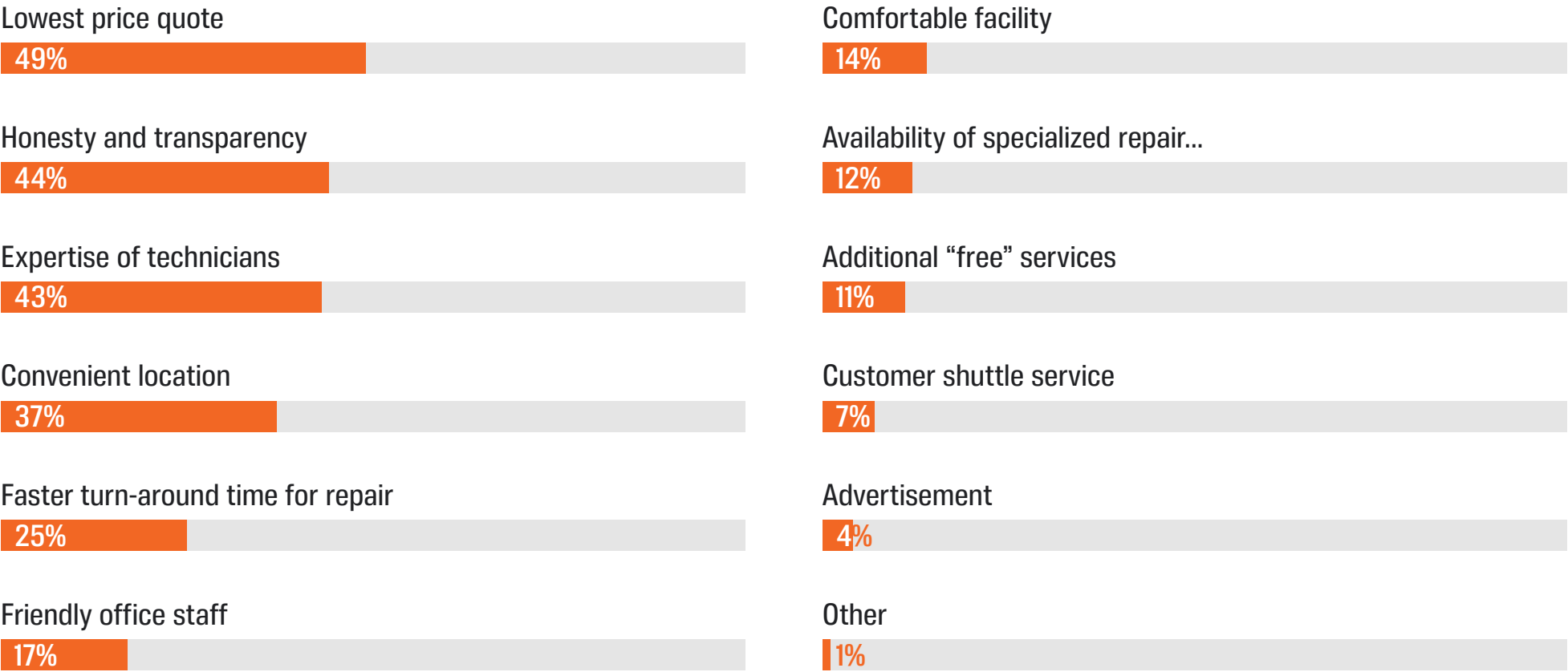


Honesty, Experience, and Quality Service

When selecting a shop for service, customers highly value shop integrity and experience. Experience stood out as a key factor for DIFM customers throughout the survey, with 43% selecting technician expertise as a deciding factor when choosing one shop over another. This response ranked higher than other options, such as fast turnaround time and convenience of location, proving that customers are looking for a reputable repair shop.

Seventy-seven percent of DIFM customers agree or strongly agree that they value an explanation of the services their shop is providing to them. Shop owners and their technicians need to go further than providing the services themselves by actually educating their customers about the issues being serviced. The good news for DIFM customers is that shop owners have the experience, with 80% having 11 years or more of industry experience and 53% boasting over 20 years of experience, with 70% honing their service at a single location for that time. The automotive industry is rich in experience, and shop owners can be reassured that DIFM customers highly value their expertise. The better a shop can communicate repairs with their customers, the more customers will feel that they are bringing their vehicle to a trusted business, ultimately resulting in more sales.

Which of the following best describes why you select one shop over another?



Consumers n=517
Average number of ads=2.7



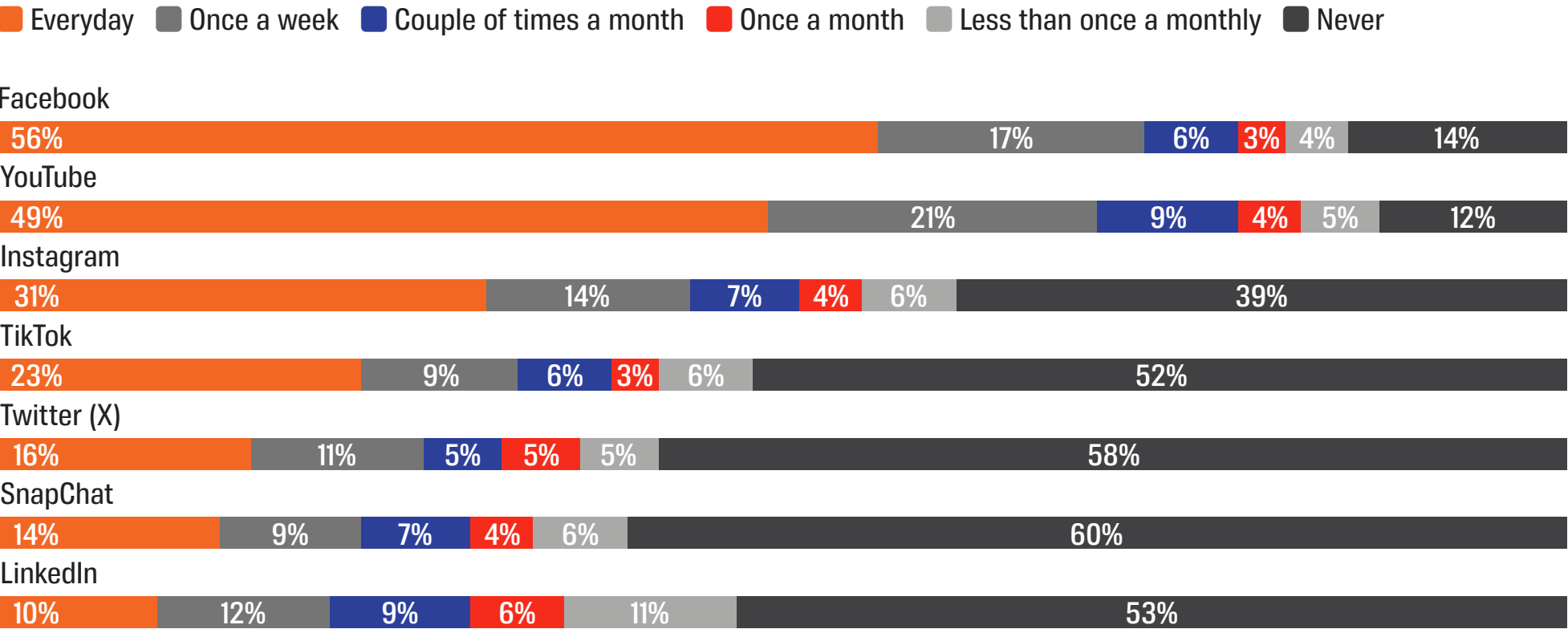
Shop Marketing Strategies

Social Media Marketing and Advertising

Shop owners often rely on a limited set of marketing strategies, which can result in overlooking valuable marketing opportunities. Potential clients spend a lot of their time online, but shops are not necessarily advertising heavily in digital spaces. Among all social media platforms, Facebook, YouTube, and Instagram emerged as the most popular among DIFM customers. More than half of respondents (56%) reported using Facebook daily, while nearly half (49%) watched YouTube videos daily. Instagram also saw significant daily interactions, with 31% of DIFM customers logging in at least once each day.

It’s clear that DIFM customers are spending most of their online time on either Facebook or YouTube, but shop owners are not reaching these markets as effectively as they could. While some shops utilize social media, overall participation remains relatively weak. Only 38% of respondents were currently using social media as an advertising platform, while a marginal 12% of owners were leveraging video marketing for advertising purposes.

How frequently do you use the following social media apps?



Consumers n=1,015

Social media participation for advertising purposes

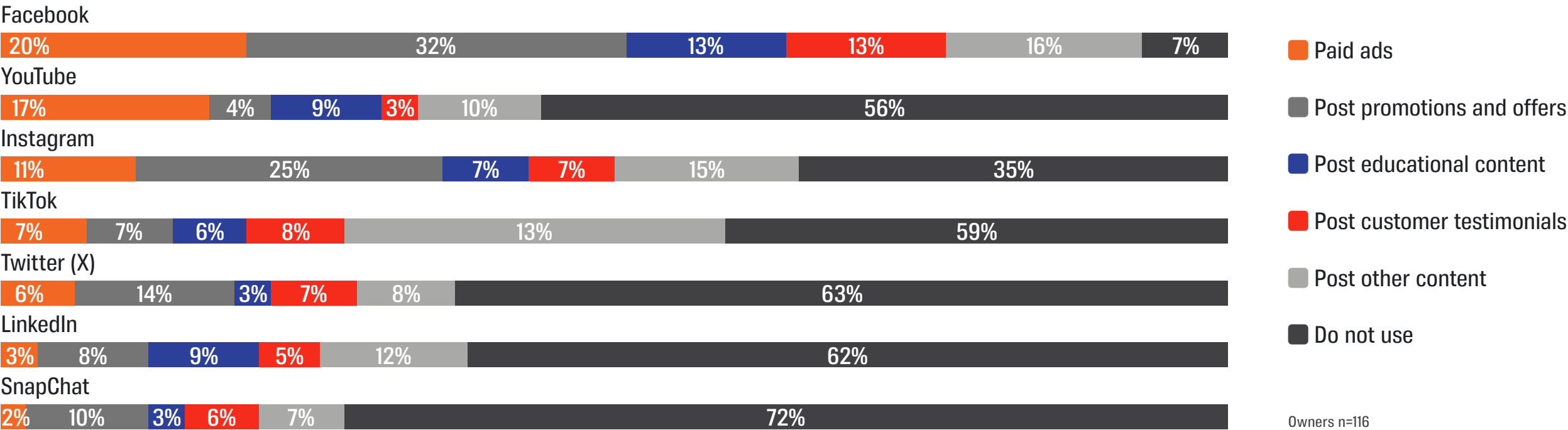


Owners n=302
Average number of responses = 4.9

When the social media-related data is broken down even further, the results show that shop owners are missing out. Seventy-five percent of owners reported that they do not use YouTube for advertising at all, while only 10% do not use Facebook. In some respects, shop owners are leveraging Facebook effectively to reach potential customers, but are missing out on other markets by overlooking potential social media giants like YouTube. Video marketing can also provide shop owners with a personal platform to connect with their customers, and in today's social climate, videos are a common source of information for people. Shop owners need to leave their social media comfort zone to tap into potential new customer bases and think creatively to attract customers in the virtual arena.



In what ways do you use social media to market your shop?

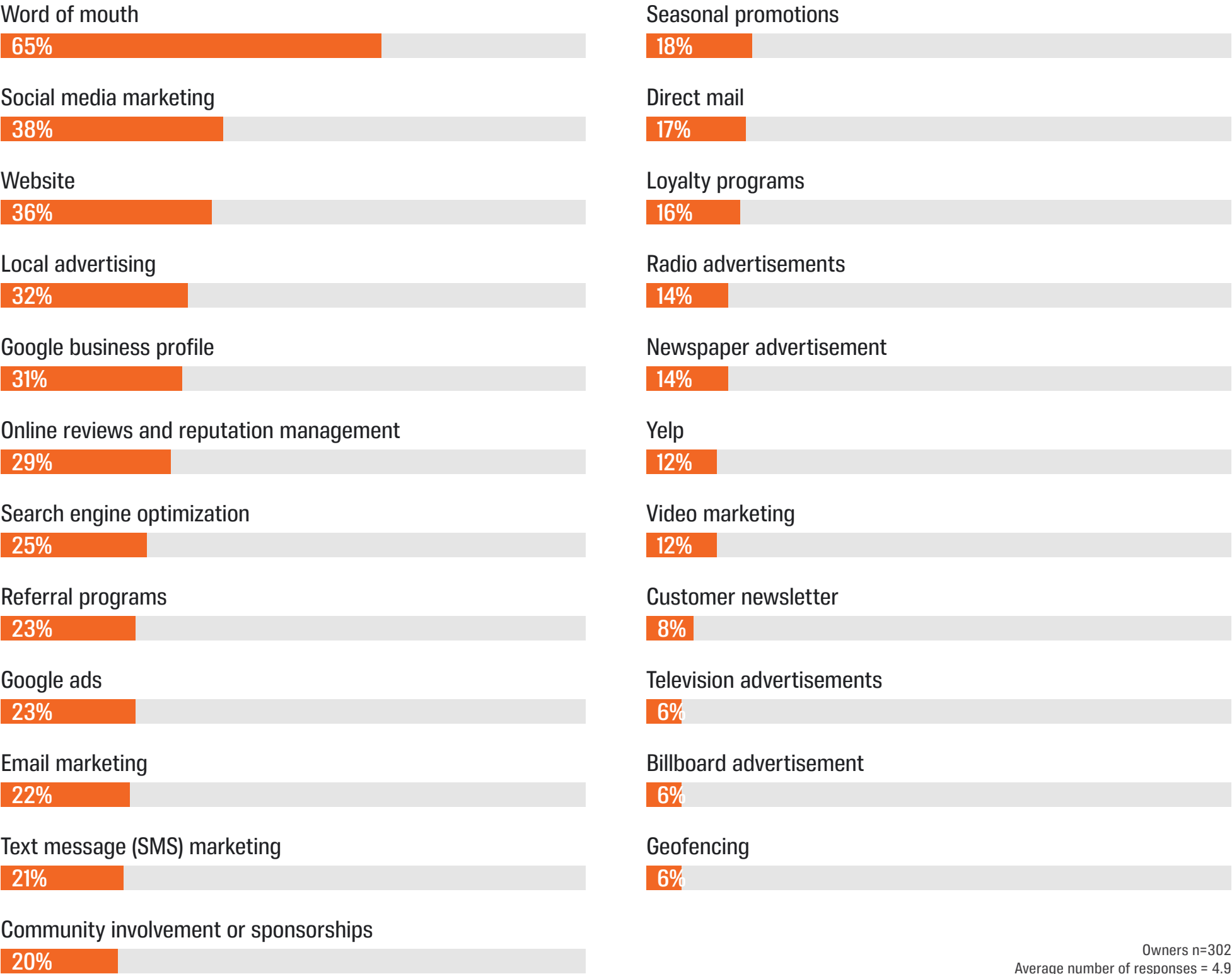


Shop Marketing and DIFM Customer Focus

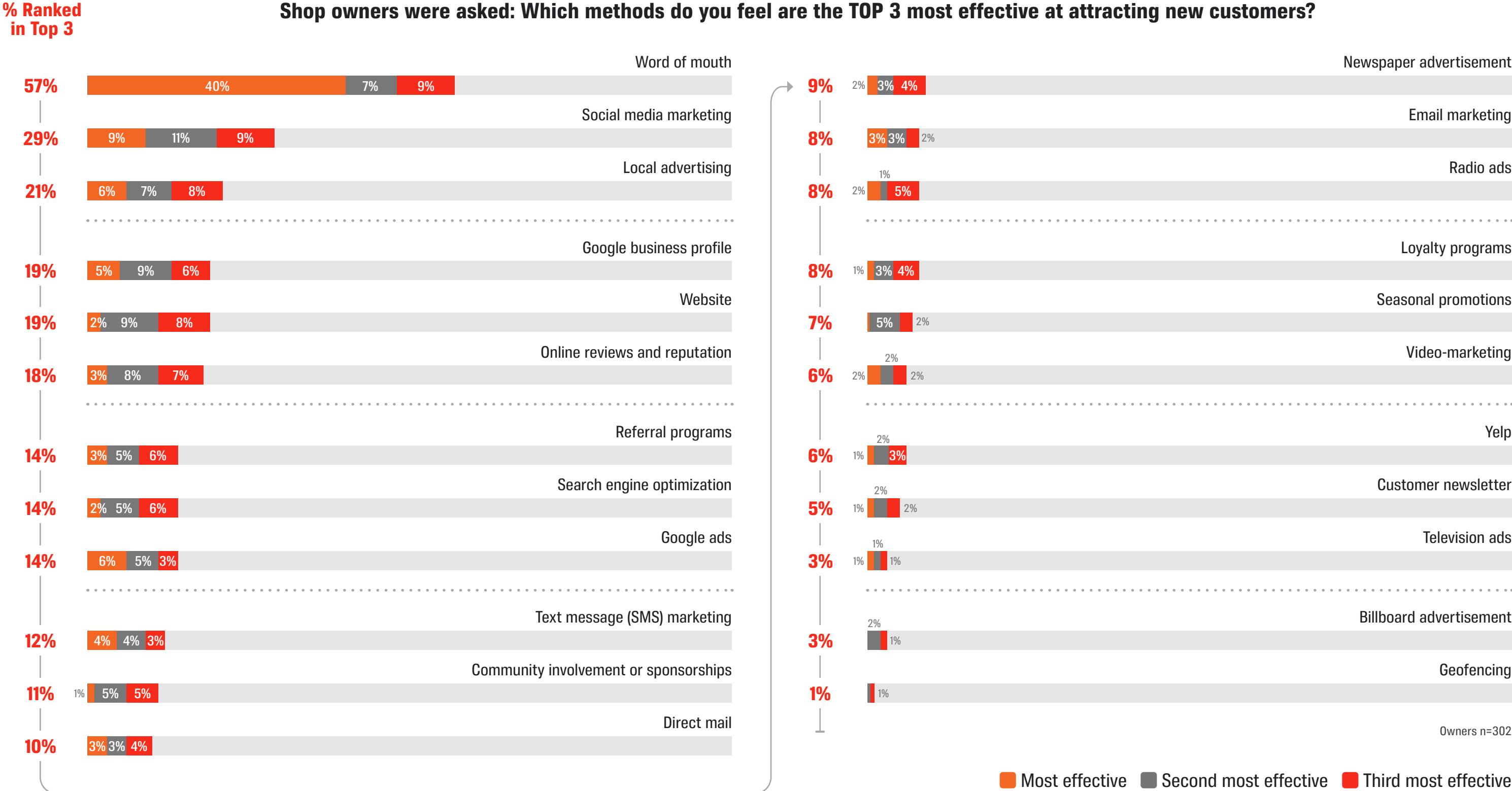
DIFM customers identified several other priorities when choosing a repair shop, but in some areas, shop owners are falling short. When surveying DIFM customers about advertisements, 72% responded that special offers for routine services would make them more or much more likely to visit a repair shop. DIFM customers are looking for promotional opportunities that allow them to save money by shopping at a specific store compared to another.

Shops are not taking advantage of online marketing opportunities as much as one might think. Only 15% of shops sent out seasonal specials via email, and only 9% used mailing campaigns, signifying that there aren't many promotional discounts being offered in the automotive industry. DIFM customers still are looking for these types of programs, with 53% reporting that they would be more or much more likely to visit a shop that rewards customer loyalty. Once again, shop owners did not see the same value, with no shop owners ranking loyalty programs as a top choice for effective methods to attract customers. Only 14% of shops reported having a loyalty program. Shop owners are missing opportunities to meet customer desires by not exploring innovative marketing approaches within the automotive industry.

Which of the following marketing efforts does your shop use to attract new customers?



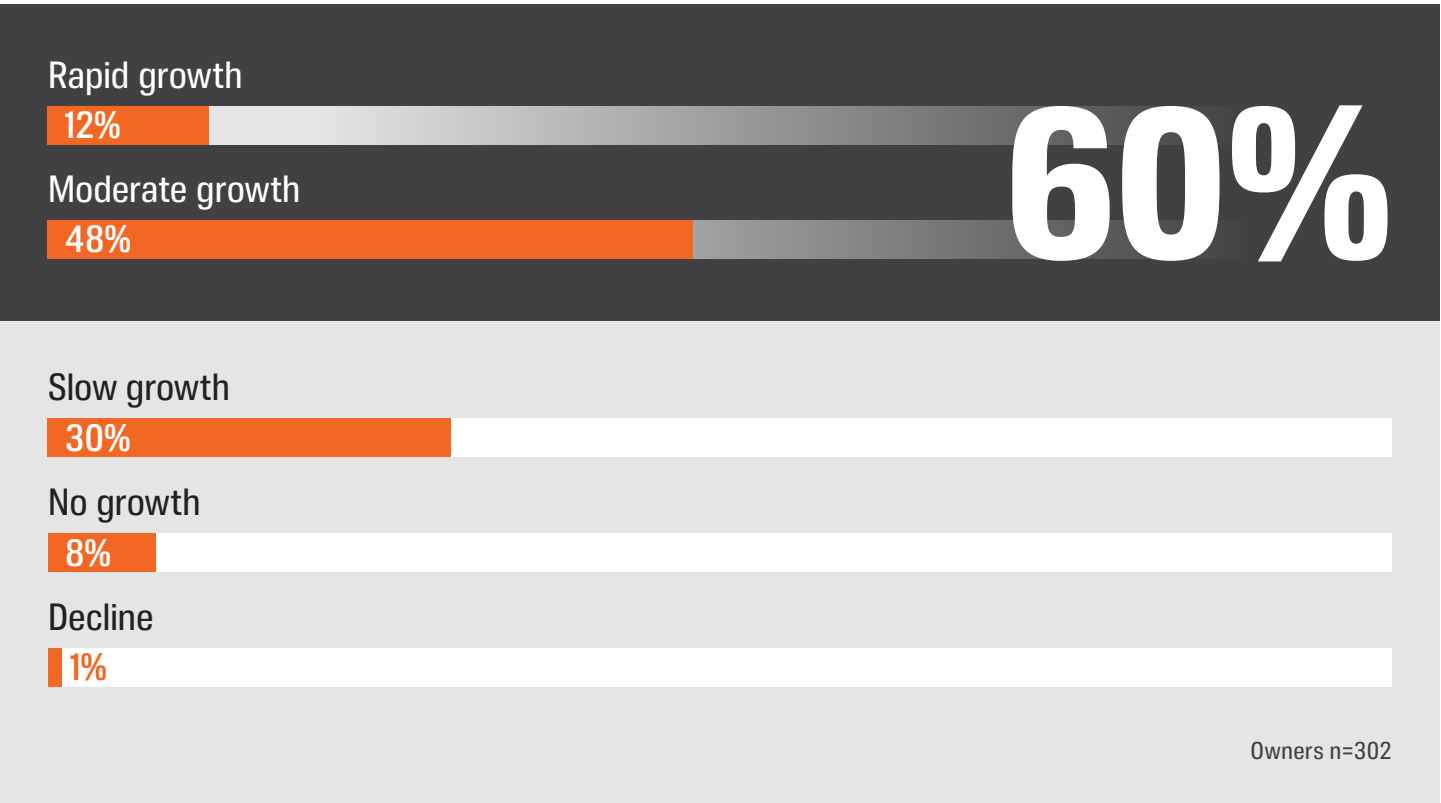
Owners n=302
Average number of responses = 4.9



Shop owners overwhelmingly rely on word-of-mouth marketing, with 79% of those surveyed considering it the most effective strategy for attracting new customers. Word-of-mouth was also considered the most effective by shop owners in maintaining their existing relationships with customers. In fact, out of all the shops surveyed, 88% reported using word-of-mouth marketing to attract new customers. Shop owners are currently relying on informal marketing methods, which are effective in some aspects, but can miss the overall target. However, there are other aforementioned marketing avenues that shop owners are missing out on, such as social media or video advertisements.

Owners said they are currently content with their shop’s overall marketing strategy, but that doesn’t tell the whole story. Sixty-six percent of shop owners are very or extremely satisfied with their conversion rate of service quotes to sales. This does not completely align with the way automotive repair shops are growing. Thirty percent of the shops surveyed reported slow growth over the past year, while 48% reported moderate growth. It is clear there are other ways shops can market to increase business. As the market remains competitive, it will be up to individual business owners and their marketing plans to attract new customers.

How would you describe your shop’s growth over the past year?



Shop Owner and DIFM Customer Survey Conclusions

DIFM customers have certain biases that may attract or dissuade them from having their vehicle repaired at a particular shop. Shop owners primarily use traditional marketing methods, supplemented by some social media, such as Facebook ads. Overwhelmingly, shops are currently relying on word-of-mouth marketing from existing customers to continue promoting their businesses. Shop owners should consider the following to maximize their marketing strategy to current and prospective customers:



DIFM customers are currently satisfied with the repairs and service levels they receive at shops, but tend to use multiple shops for repairs.



DIFM customers are accustomed to video-style ads — social media websites like YouTube have untapped potential for advertising.



Although shop owners take on multiple roles within the shop, developing a strong marketing strategy appears to pay off.



Trustworthiness and expertise are two common factors that keep DIFM customers as repeat customers.

Following these considerations can assist shop owners in creating a marketing strategy for their shop and implementing it with lasting, positive effects for their business.



About AutoZone

AutoZone is the leading provider of automotive parts with over 7,000 stores and growing. With a vast and growing distribution network, AutoZone makes it easy for shops to get the parts they need quickly. We've made significant investments to improve parts availability and expand our late-model and import coverage across all business lines. Our dedicated Commercial Service Team is focused on supporting customers to help them keep bays turning.



In May of 2025, AutoZone research partners, Endeavor Business Intelligence and Ratchet+Wrench, surveyed 300 automobile repair shop owners and 1,000 DIFM customers who have had their vehicle repaired by an automotive repair shop in the last 12 months. All shop owners and managers responded from independent, non-franchised repair shops.

About The Survey