



Beyond Service: What Customers Really Value From Their Workshop SUMMARY PACK

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AUSTRALIAN AUTOMOTIVE
AFTERMARKET ASSOCIATION

fifth
quadrant

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Independent workshops are the preferred choice for most Australians (and trust is the decisive factor in that choice), but loyalty is not unconditional, and warranty misconceptions are actively channelling customers to dealerships.



UNPACKING THE LOYALTY LANDSCAPE

- Six in ten Australians give one workshop their exclusive business
- 27% are regulars who will look elsewhere only if their preferred workshop is unavailable.
- The Undecided (13% of the market) actively shop around, but respond well to easy, consistent service experiences.



WHAT EARNS (AND KEEPS) A CUSTOMER

- Trust and reputation drive workshop selection, ahead of convenience and price.
- Word of mouth and Google search are how most Australians find their workshop
- trust in the specific mechanic or business is what converts that search into a lasting relationship.
- Seven in ten Australians will pay a premium for a workshop they trust.



THE WARRANTY MYTH IS COSTING WORKSHOPS

- 46% of car owners currently have a vehicle under warranty, and a significant proportion wrongly believe they must use a franchised dealership to keep that warranty valid.
- Warranty status is the single strongest predictor of workshop channel, with in-warranty customers defaulting to dealerships at twice the rate of those without.



TRUST IS HIGH BUT NOT UNCONDITIONAL

- Almost all consumers trust their workshop, but 57% worry about paying for unnecessary work and around four in ten question whether workshops act in their genuine interest.
- This concern runs across all segments, not just the Undecided, and is the fault line through which customer relationships fracture.

The opportunity for aftermarket workshops is larger than it appears: the Undecided are recoverable, the warranty channel is being surrendered unnecessarily, and the price premium most operators worry about is not the barrier they think it is. The customers who leave do so because trust breaks down, not because a cheaper option appeared.

The Experience Gap

Overall satisfaction with workshop services is high across all touchpoints, but the gap between Committed and Undecided customers widens at every in-person contact point, and the moments where loyalty is won or lost are the ones operators are currently investing in least.



THE EXPERIENCE GAP BY SEGMENT

- Satisfaction scores are uniformly above 84% across all six touchpoints, but this masks a 17-point extreme-satisfaction divide between Committed and Undecided customers.
- That gap is smallest at mid-service communication (the most process-dependent stage), and widest at drop-off and pickup, where the quality of human interaction determines the relationship impact.



WHERE THE LOYALTY DIVIDE OPENS

- The segment gap begins at booking (Committed and Undecided are 24 points apart before the car enters the workshop), widens through arrival and drop-off, narrows during the service itself, and then reopens sharply at pickup and post-service care.
- For Undecided, pick-up and post-service satisfaction scores fall to 71%, both touchpoints that are within the workshop's control.



WHAT EACH SEGMENT NEEDS

- Committed return by default, wanting proactivity and personalisation to deepen the relationship.
- Regulars need consistent transparency and clear communication to close the remaining trust gap.
- Undecided are won through frictionless execution: fix it right first time, make it easy to book, explain what was done, and follow up.



CUSTOMER VS. OPERATOR UNDERSTANDING

- Operators believe loyalty is built at the workbench through quality of repair.
- Customers are forming revisitation attitudes at the handover, not in the workshop bay.
- Proactive communication, visible transparency, and a consistent post-service touchpoint are what differentiates those very likely to return from those who are not.

Workshops do not need to improve the quality of their mechanical work. They need to make that quality visible through the way they communicate, explain, and follow up. The gap between extremely satisfied Committed customers and disengaged Undecided customers is not a quality gap; it is a communication gap.

THANK YOU

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The AAAA regularly commissions research on behalf of members to assess the health and trends within the broader automotive industry and various sectors within. The data gathered provides useful insights and powerful information for business growth and direction. The research also assists the AAAA in affecting regulatory change at a government level on behalf of the industry.

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