



**NFDA DEALER ATTITUDE SURVEY
RESULTS
WINTER 2017/2018**

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

NFDA

DEALER ATTITUDE SURVEY RESULTS

WINTER 2017/2018

We are pleased to reveal the findings of the latest Dealer Attitude Survey conducted in January 2018 by the National Franchised Dealers Association (NFDA), which represents the interests of the UK's franchised car dealer sector through business support to its members and parliamentary lobbying on behalf of the industry.

This survey is carried out on a twice-yearly basis, and examines how dealers view the major issues currently affecting them, while also evaluating how these views are changing over time. It also offers franchised dealers and their respective manufacturers a clear idea of the balance of opinion held on a range of views within their networks.

The charts on the following pages set out the views from dealers in twenty nine networks. Each rating reflects the consensus view based on responses from typically one in four dealers within each network. You will also find the rankings for each question at the end of the charts.

Dealers were asked to respond to questions covering significant aspects of their business relationship with their manufacturer. From these responses scores have been produced on a simple ten point scale, running from 1 – extremely dissatisfied to 10 – extremely satisfied.

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National Franchised Dealers Association (NFDA)
September 2017
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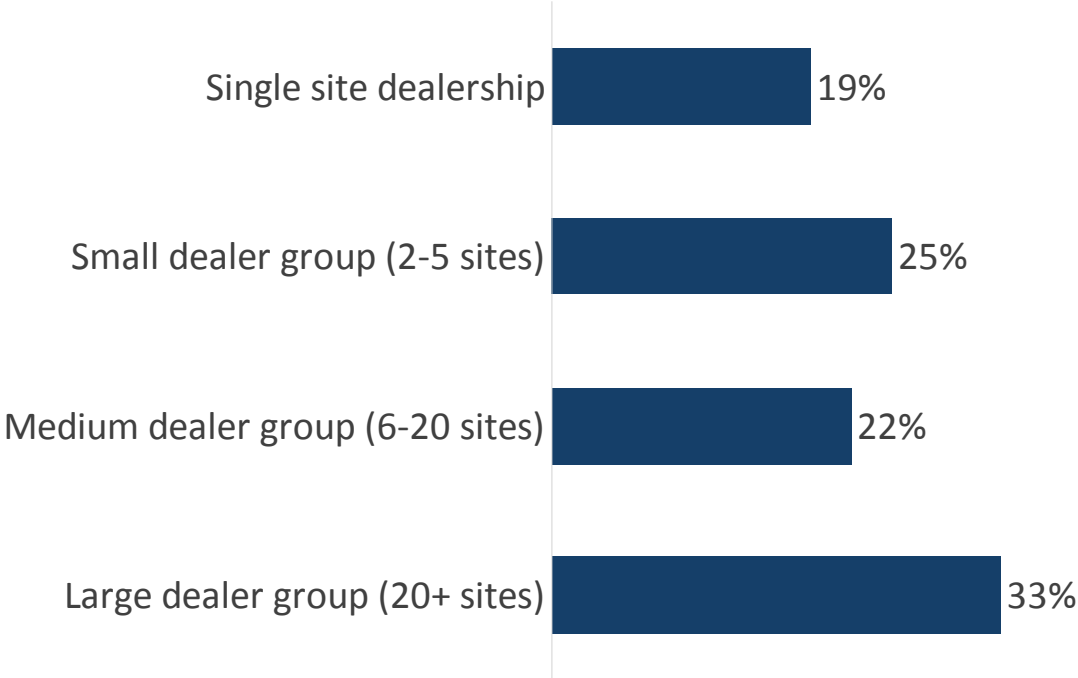
NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

DEALER ATTITUDE SURVEY WINTER 2018 BREAKDOWN OF RESPONDENTS

FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
Abarth	21	88	24
Alfa Romeo	22	46	48
Audi	45	124	36
BMW	52	139	37
Citroen	111	159	70
Fiat	87	142	61
Ford	156	453	34
Honda	85	150	57
Hyundai	86	158	54
Jaguar	39	85	46
Jeep	27	58	47
Kia	93	190	49
Land Rover	56	119	47
Lexus	14	47	30
Mazda	74	130	57
Mercedes	14	40	35
Mini	33	138	24
Mitsubishi	47	94	50
Nissan	83	180	46
Peugeot	121	169	72
Renault	88	147	60
Seat	61	115	53
Skoda	62	128	48
Subaru	21	76	28
Suzuki	47	157	30
Toyota	54	177	31
Vauxhall	128	330	39
Volkswagen	98	189	52
Volvo	68	101	67
TOTAL	1893	4041	47

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

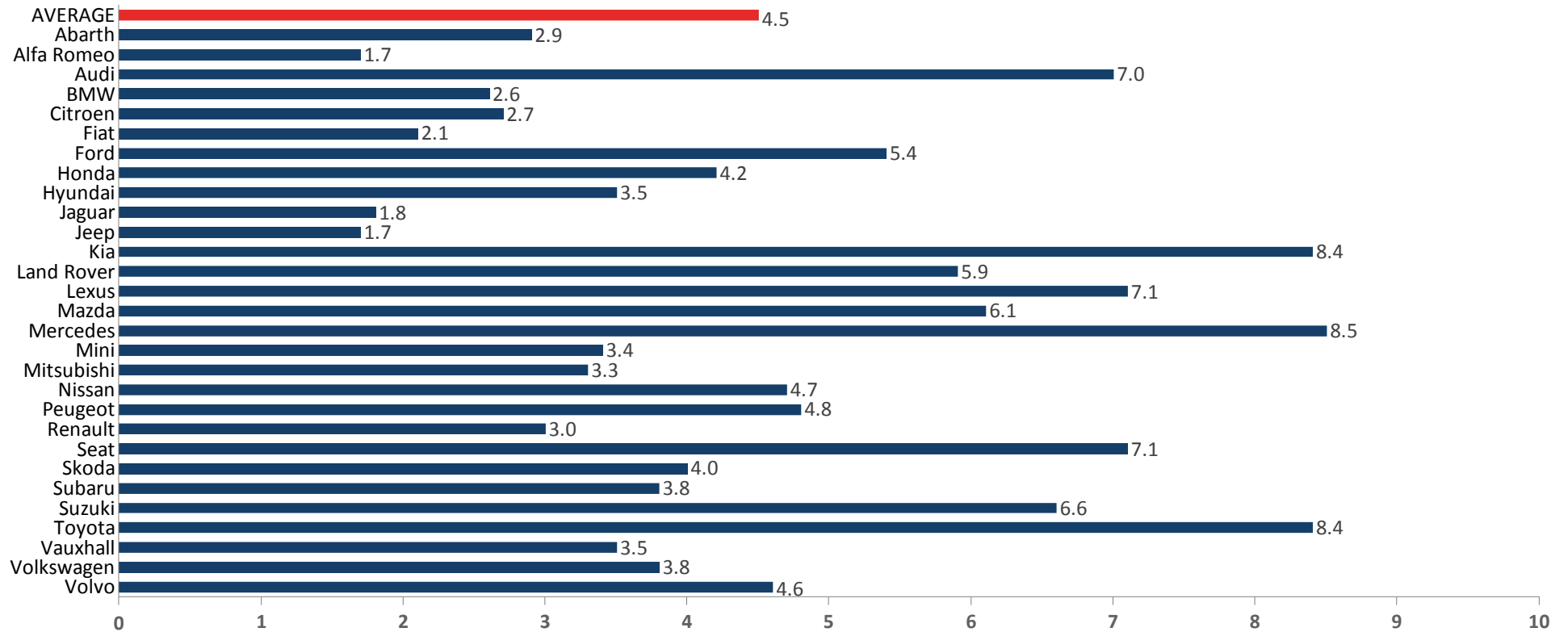
Q2. Is your business a:



Base: All respondents (1873)

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q4a. How satisfied are you with the current profit return from representing your franchise?

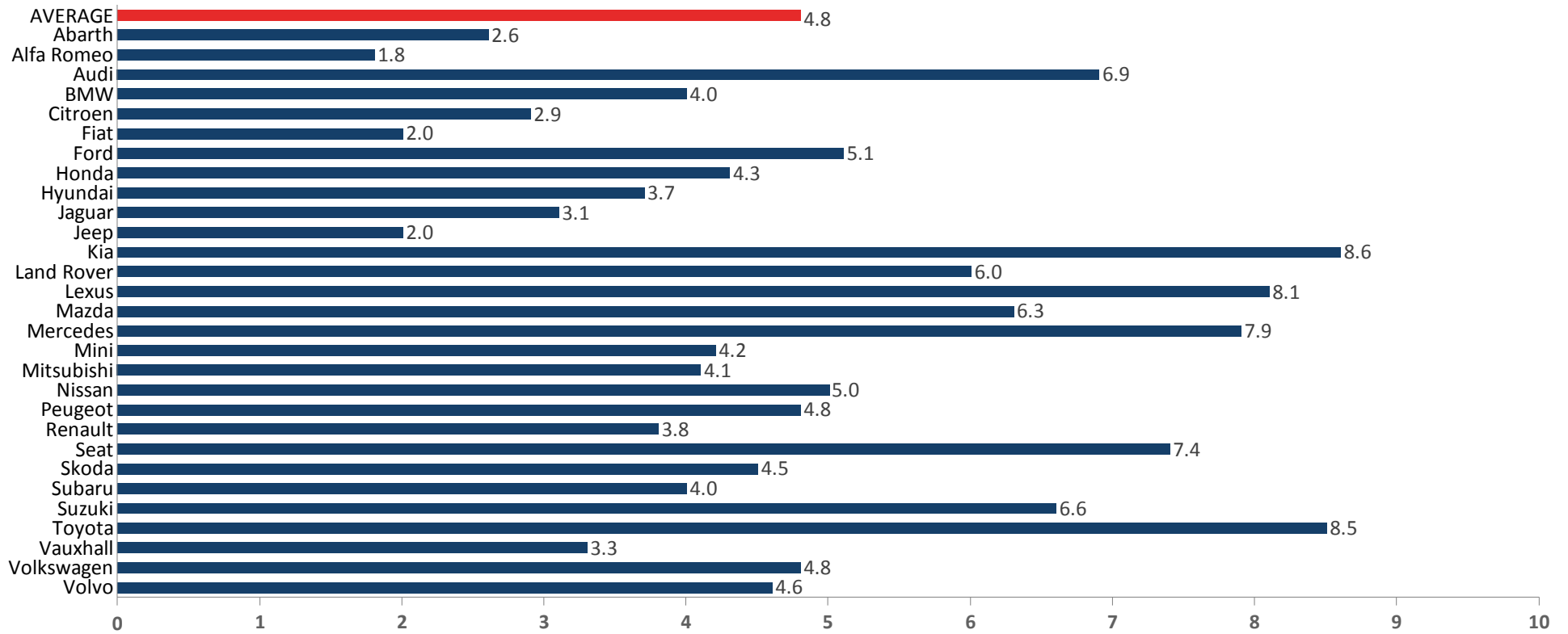


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.7	Ford	5.9	Land Rover	6.6	Nissan	2.8	Suzuki	7.3		
Alfa Romeo	2.4	Honda	4.0	Lexus	7.5	Peugeot	4.5	Toyota	6.7		
Audi	6.5	Hyundai	4.2	Mazda	6.6	Renault	4.6	Vauxhall	3.4		
BMW	3.8	Jaguar	4.2	Mercedes	8.6	Seat	6.2	Volkswagen	3.7		
Citroen	2.7	Jeep	2.5	Mini	4.3	Skoda	4.9	Volvo	5.0		
Fiat	4.1	Kia	8.5	Mitsubishi	3.7	Subaru	3.6			AVERAGE	4.8

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q4b. How satisfied are you with the future profit return from representing your franchise?

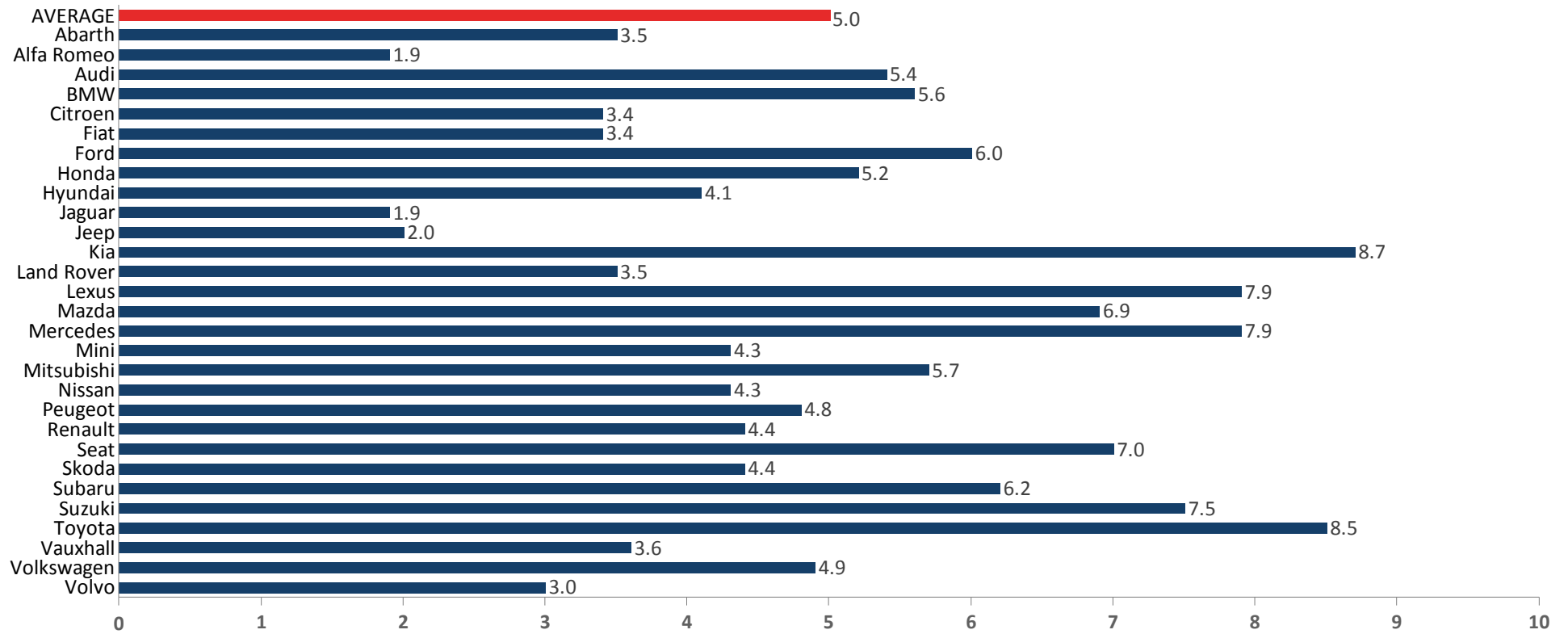


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.7	Ford	6.0	Land Rover	6.3	Nissan	2.9	Suzuki	7.2		
Alfa Romeo	3.7	Honda	4.7	Lexus	7.9	Peugeot	4.7	Toyota	6.6		
Audi	6.6	Hyundai	4.4	Mazda	7.1	Renault	5.6	Vauxhall	3.9		
BMW	4.7	Jaguar	5.7	Mercedes	8.1	Seat	7.0	Volkswagen	5.0		
Citroen	2.7	Jeep	2.6	Mini	5.0	Skoda	5.5	Volvo	5.1		
Fiat	4.1	Kia	8.5	Mitsubishi	4.1	Subaru	3.7			AVERAGE	5.2

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q4c. How satisfied are you with the required level of capital investment?

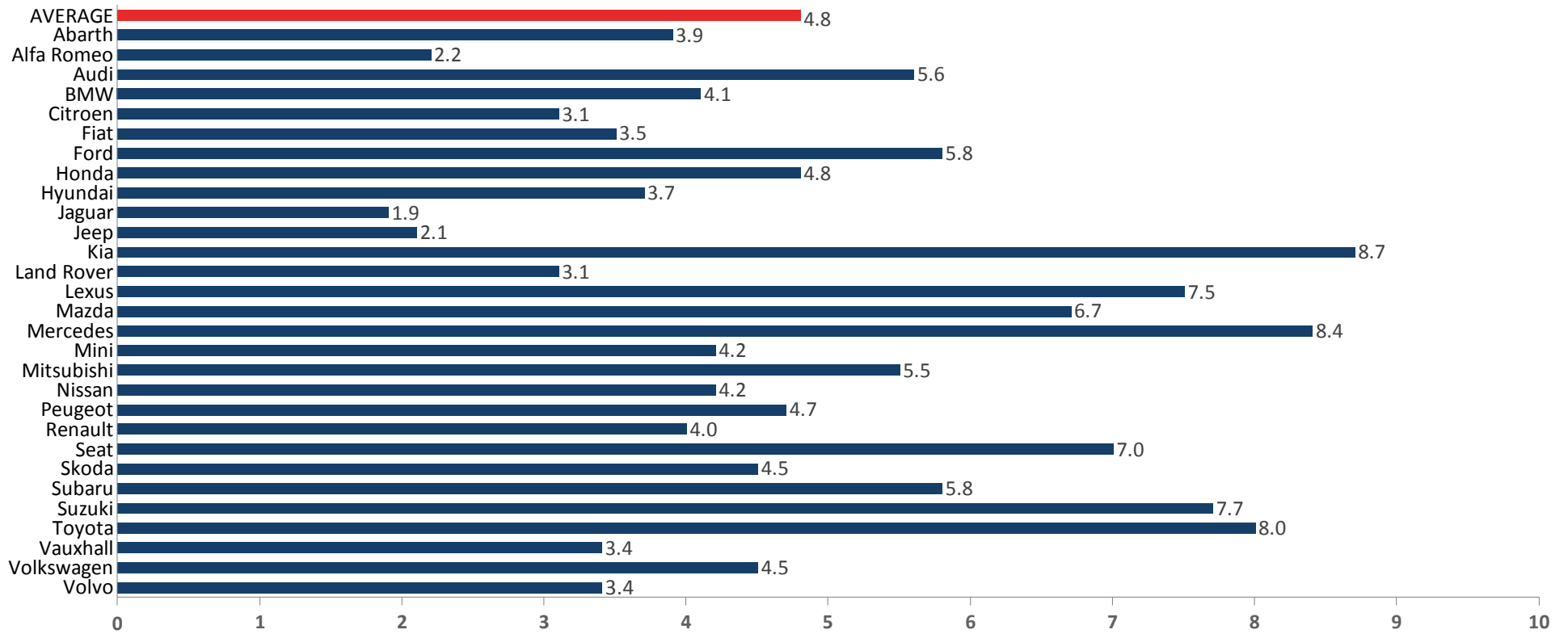


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	4.8	Ford	5.9	Land Rover	4.6	Nissan	3.1	Suzuki	8.3		
Alfa Romeo	1.7	Honda	5.1	Lexus	7.5	Peugeot	4.7	Toyota	6.4		
Audi	6.0	Hyundai	4.5	Mazda	7.0	Renault	4.9	Vauxhall	3.1		
BMW	4.9	Jaguar	3.4	Mercedes	7.6	Seat	7.2	Volkswagen	4.1		
Citroen	3.3	Jeep	2.1	Mini	5.1	Skoda	4.9	Volvo	3.9		
Fiat	4.6	Kia	8.6	Mitsubishi	5.5	Subaru	5.8			AVERAGE	5.1

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q4d. How satisfied are you with the cost required in your dealership to meet franchised standards?

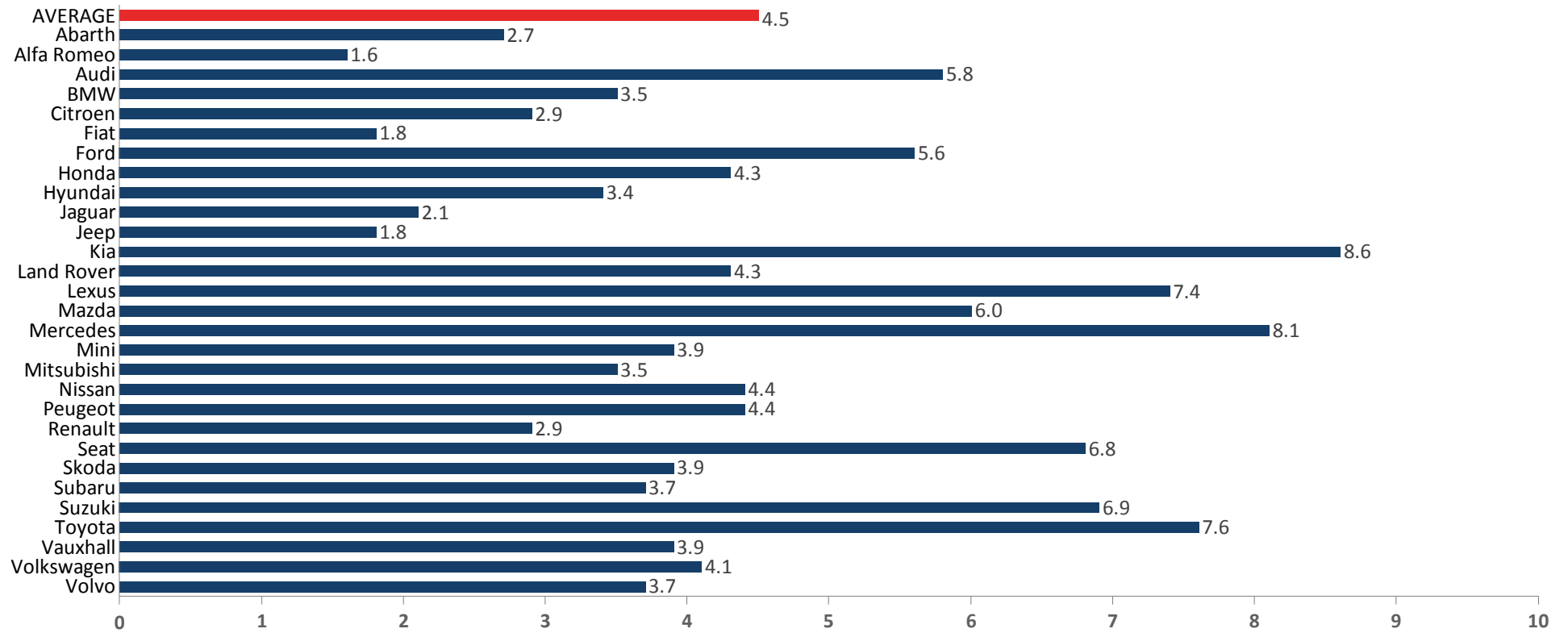


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.2	Ford	4.7	Land Rover	4.6	Nissan	2.9	Suzuki	8.4		
Alfa Romeo	2.7	Honda	5.2	Lexus	7.2	Peugeot	4.3	Toyota	6.1		
Audi	5.6	Hyundai	4.3	Mazda	7.1	Renault	5.8	Vauxhall	3.9		
BMW	3.9	Jaguar	3.3	Mercedes	8.7	Seat	6.8	Volkswagen	4.2		
Citroen	3.1	Jeep	2.4	Mini	4.2	Skoda	4.9	Volvo	4.2		
Fiat	4.9	Kia	8.7	Mitsubishi	5.4	Subaru	5.6			AVERAGE	5.0

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q4e. How satisfied are you with the return on capital for your dealership?

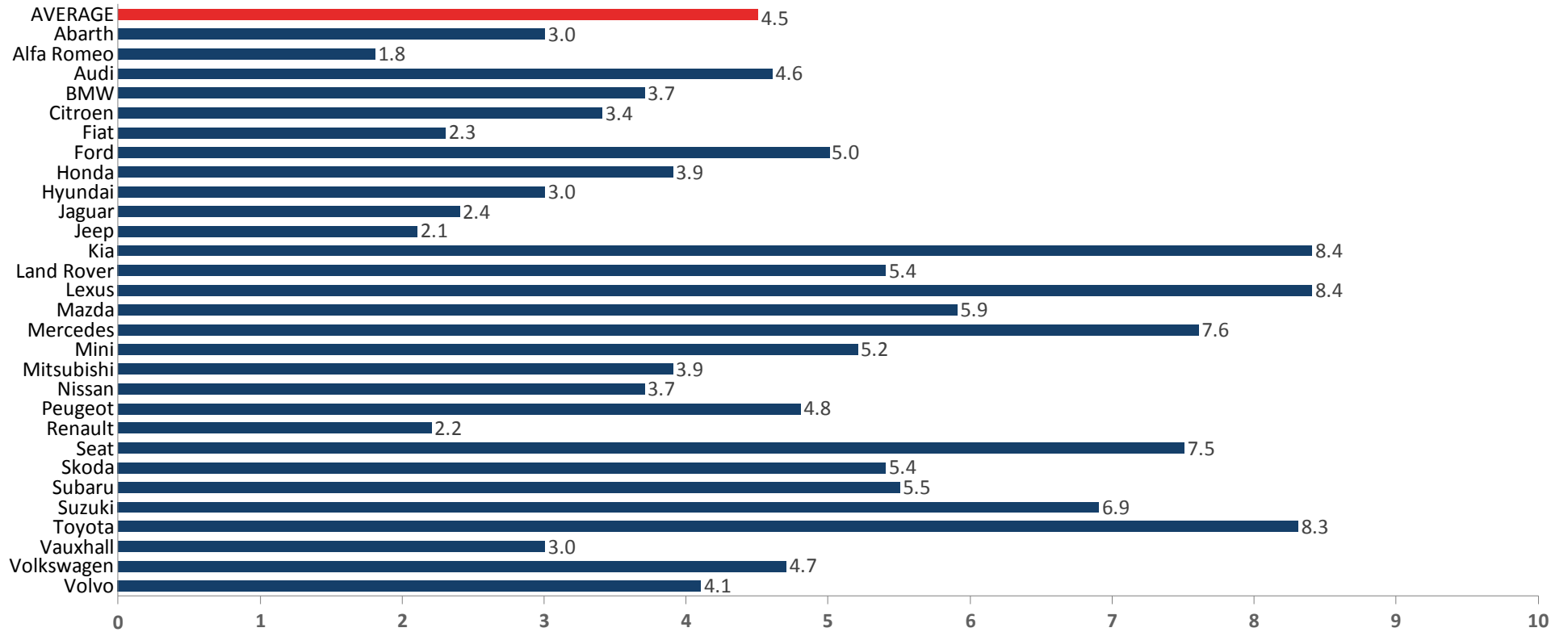


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	4.5	Ford	5.4	Land Rover	5.7	Nissan	2.5	Suzuki	7.4		
Alfa Romeo	1.7	Honda	4.6	Lexus	7.0	Peugeot	4.0	Toyota	6.3		
Audi	6.0	Hyundai	4.2	Mazda	6.4	Renault	3.9	Vauxhall	3.5		
BMW	4.8	Jaguar	4.0	Mercedes	8.7	Seat	6.6	Volkswagen	3.9		
Citroen	2.7	Jeep	2.0	Mini	5.0	Skoda	4.5	Volvo	4.3		
Fiat	3.9	Kia	8.6	Mitsubishi	3.7	Subaru	3.7			AVERAGE	4.7

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q5a. How satisfied are you that the volume target aspirations of your manufacturer are realistic?

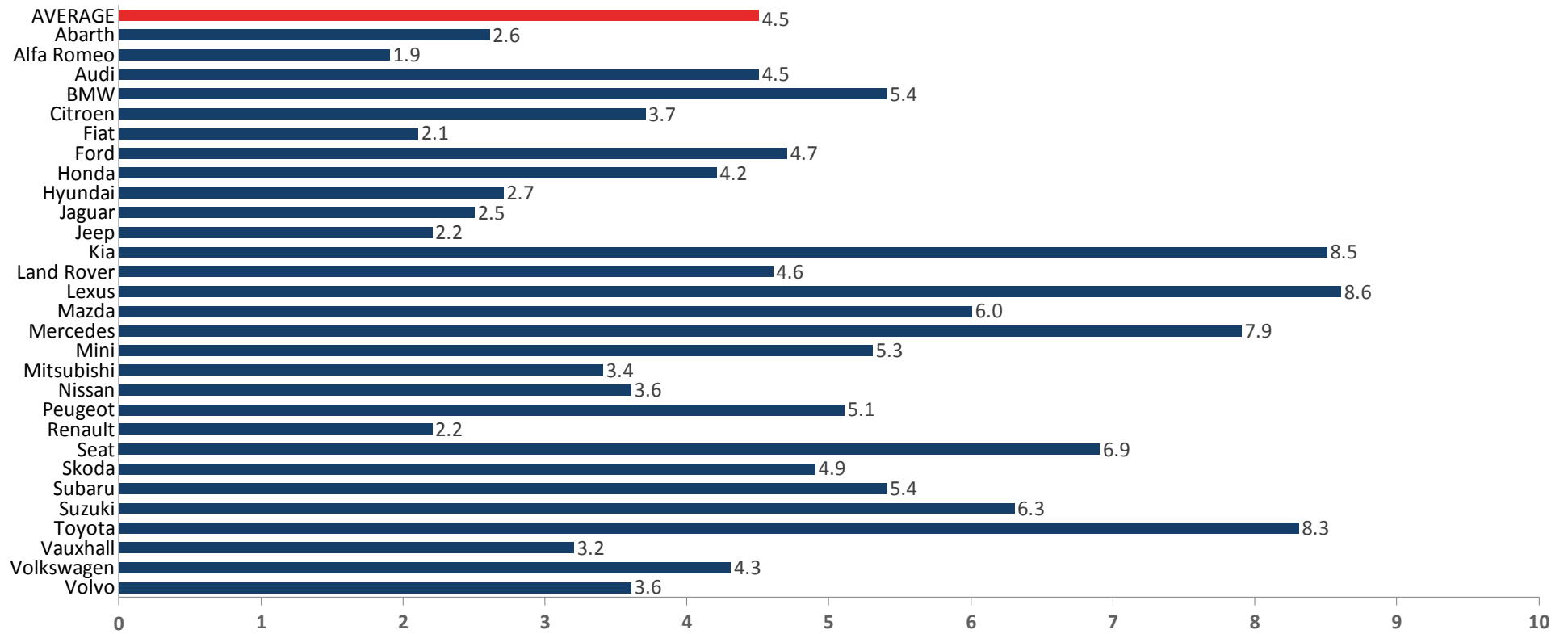


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	4.0	Ford	4.4	Land Rover	6.6	Nissan	2.0	Suzuki	7.3		
Alfa Romeo	3.1	Honda	5.6	Lexus	7.7	Peugeot	5.3	Toyota	6.6		
Audi	5.6	Hyundai	3.9	Mazda	7.1	Renault	3.1	Vauxhall	2.6		
BMW	3.9	Jaguar	4.7	Mercedes	7.5	Seat	6.5	Volkswagen	4.9		
Citroen	2.9	Jeep	1.8	Mini	4.4	Skoda	5.1	Volvo	4.9		
Fiat	3.5	Kia	8.2	Mitsubishi	3.8	Subaru	5.5			AVERAGE	4.8

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q5b. How satisfied are you with your new car targeting process?

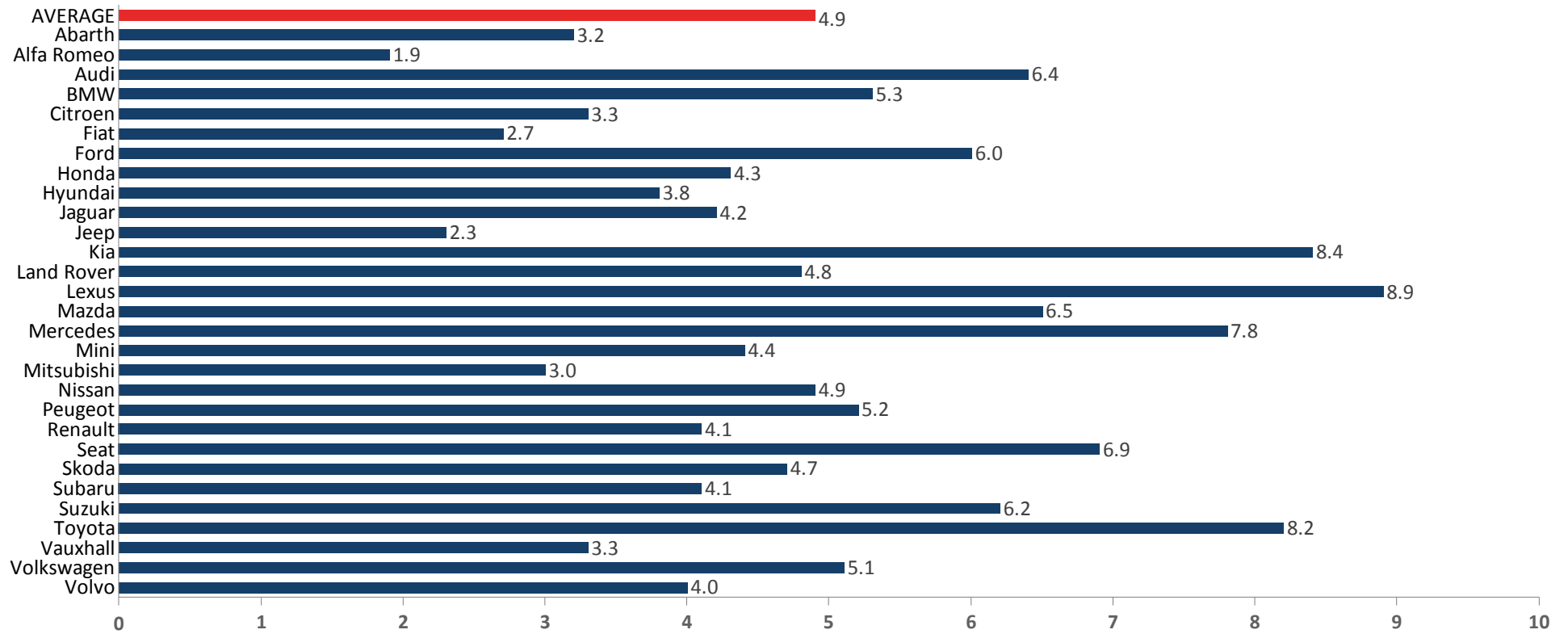


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	4.0	Ford	4.6	Land Rover	6.1	Nissan	1.8	Suzuki	6.9		
Alfa Romeo	2.9	Honda	5.0	Lexus	7.6	Peugeot	5.4	Toyota	7.0		
Audi	5.0	Hyundai	3.9	Mazda	6.9	Renault	3.9	Vauxhall	2.7		
BMW	3.7	Jaguar	4.6	Mercedes	7.6	Seat	6.3	Volkswagen	4.7		
Citroen	3.2	Jeep	1.8	Mini	4.0	Skoda	5.0	Volvo	3.7		
Fiat	2.5	Kia	8.3	Mitsubishi	3.6	Subaru	5.0			AVERAGE	4.7

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q5c. How satisfied are you with your total margin on new vehicles?

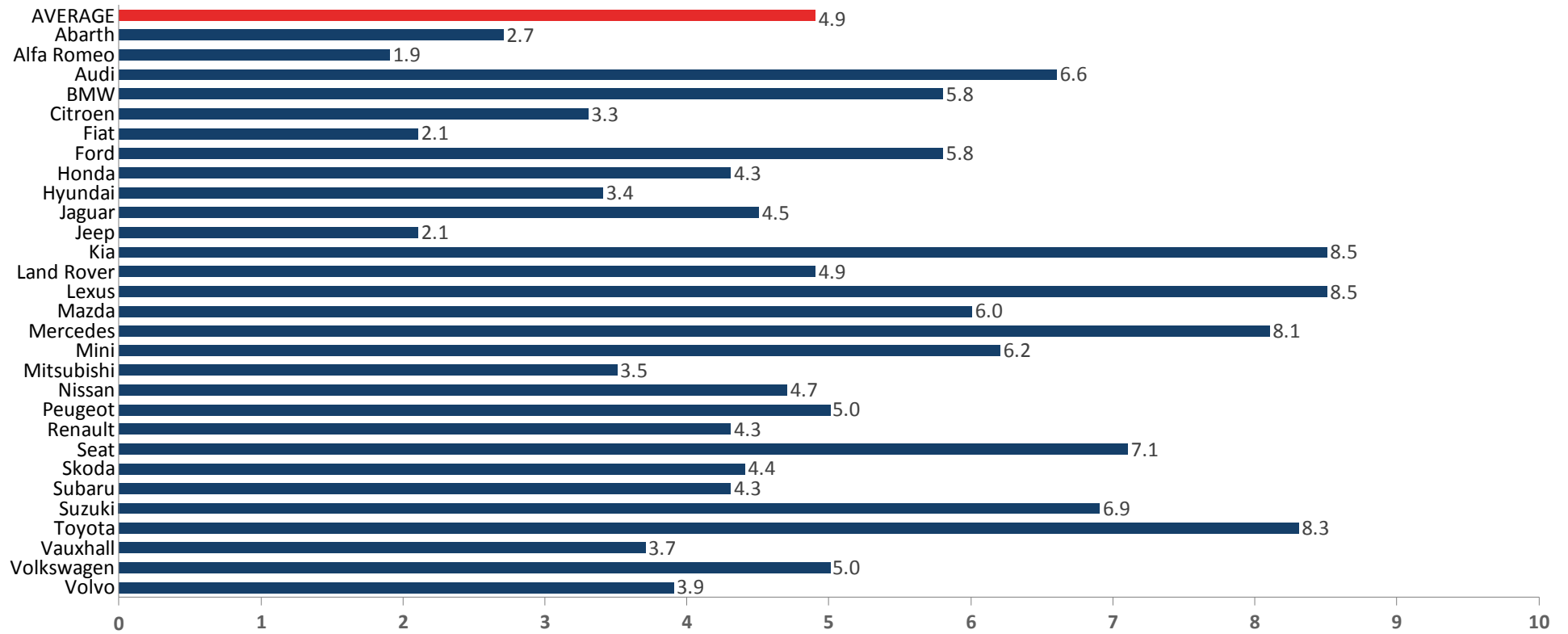


PREVIOUS SURVEY RESULTS - SUMMER 2017

Abarth	5.7	Ford	6.4	Land Rover	6.4	Nissan	3.3	Suzuki	6.7		
Alfa Romeo	2.8	Honda	4.6	Lexus	7.7	Peugeot	5.2	Toyota	7.0		
Audi	6.0	Hyundai	4.2	Mazda	6.9	Renault	6.3	Vauxhall	3.0		
BMW	3.1	Jaguar	4.4	Mercedes	7.1	Seat	6.5	Volkswagen	5.3		
Citroen	3.0	Jeep	2.5	Mini	3.7	Skoda	4.3	Volvo	4.1		
Fiat	3.9	Kia	8.4	Mitsubishi	3.2	Subaru	3.8			AVERAGE	5.0

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q5d. How satisfied are you with your current bonus and rebate rates on new car sales?

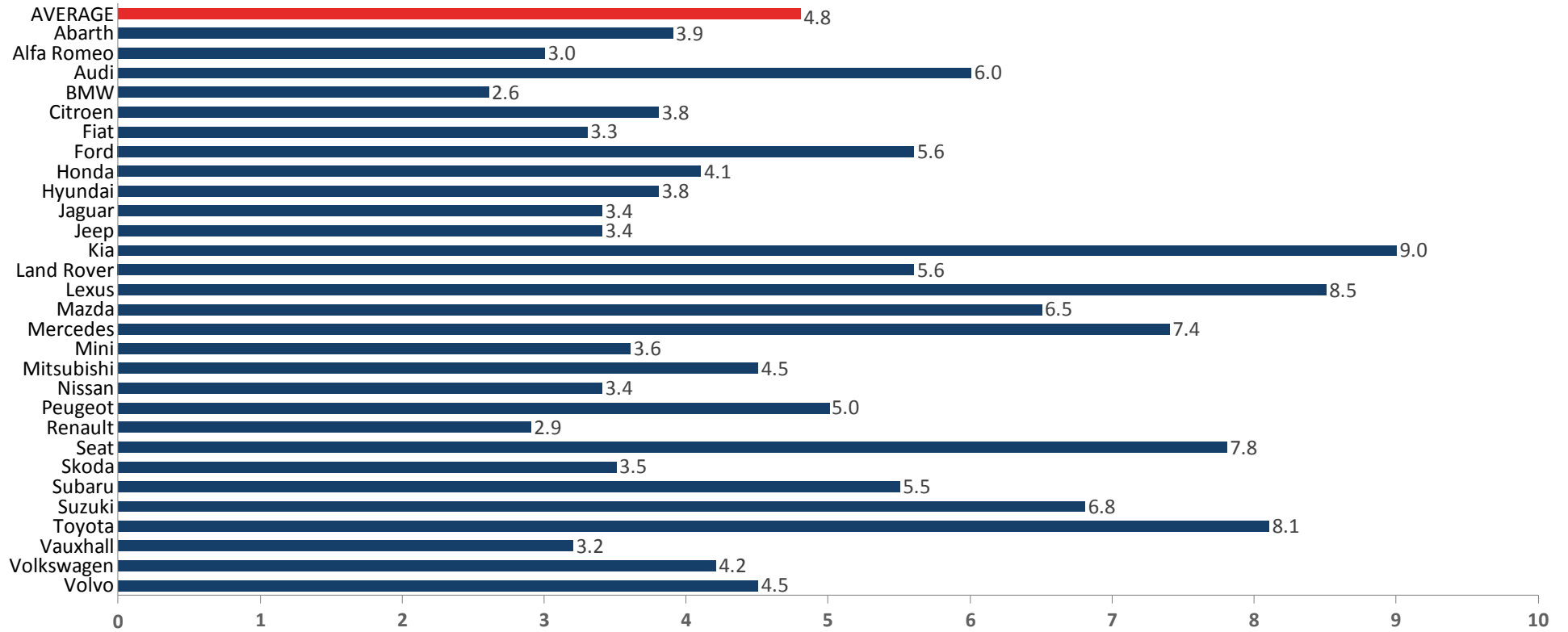


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	4.0	Ford	5.9	Land Rover	5.7	Nissan	2.7	Suzuki	6.9		
Alfa Romeo	2.9	Honda	4.8	Lexus	7.9	Peugeot	5.0	Toyota	7.0		
Audi	5.6	Hyundai	4.0	Mazda	6.6	Renault	6.2	Vauxhall	3.8		
BMW	4.9	Jaguar	4.7	Mercedes	8.3	Seat	6.4	Volkswagen	5.0		
Citroen	3.1	Jeep	2.9	Mini	5.2	Skoda	4.6	Volvo	4.1		
Fiat	3.2	Kia	8.2	Mitsubishi	3.6	Subaru	3.8			AVERAGE	5.0

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q5e. How satisfied are you with your manufacturer's inducement to self register vehicles?

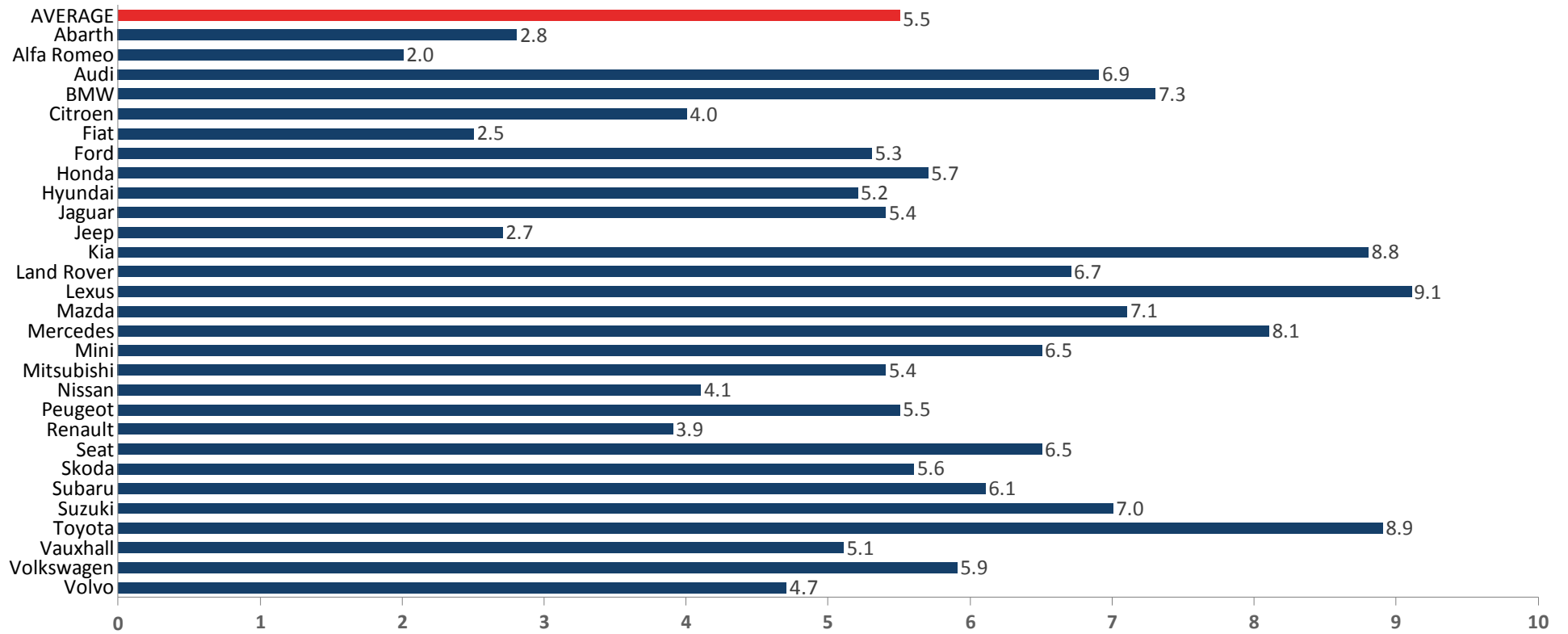


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.9	Ford	5.7	Land Rover	5.8	Nissan	1.9	Suzuki	7.0		
Alfa Romeo	4.2	Honda	4.7	Lexus	7.5	Peugeot	5.1	Toyota	5.4		
Audi	5.6	Hyundai	4.2	Mazda	6.9	Renault	3.2	Vauxhall	2.7		
BMW	3.2	Jaguar	3.6	Mercedes	7.8	Seat	7.0	Volkswagen	4.6		
Citroen	3.4	Jeep	4.4	Mini	3.8	Skoda	5.0	Volvo	5.1		
Fiat	4.7	Kia	8.0	Mitsubishi	4.6	Subaru	5.7			AVERAGE	4.8

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q5f. How satisfied are you with the fairness of your manufacturer's new car ordering and stocking policies?

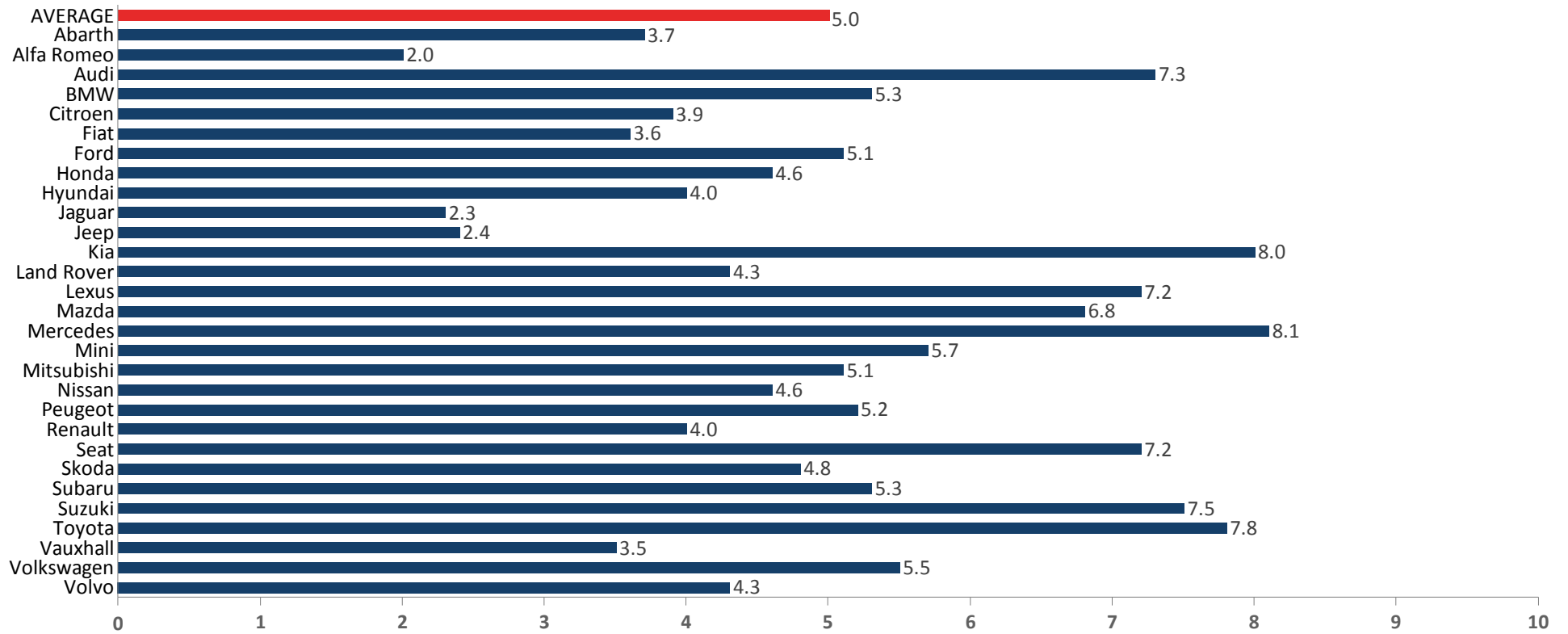


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.7	Ford	5.9	Land Rover	5.7	Nissan	2.3	Suzuki	7.0		
Alfa Romeo	3.1	Honda	6.4	Lexus	8.9	Peugeot	5.9	Toyota	8.4		
Audi	6.8	Hyundai	5.9	Mazda	7.5	Renault	5.7	Vauxhall	4.6		
BMW	4.6	Jaguar	5.9	Mercedes	8.0	Seat	6.3	Volkswagen	6.5		
Citroen	3.6	Jeep	4.0	Mini	4.7	Skoda	5.7	Volvo	4.7		
Fiat	4.3	Kia	8.6	Mitsubishi	5.7	Subaru	6.2			AVERAGE	5.8

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q5g. How satisfied are you with the fairness of your manufacturer's demonstrator programme?

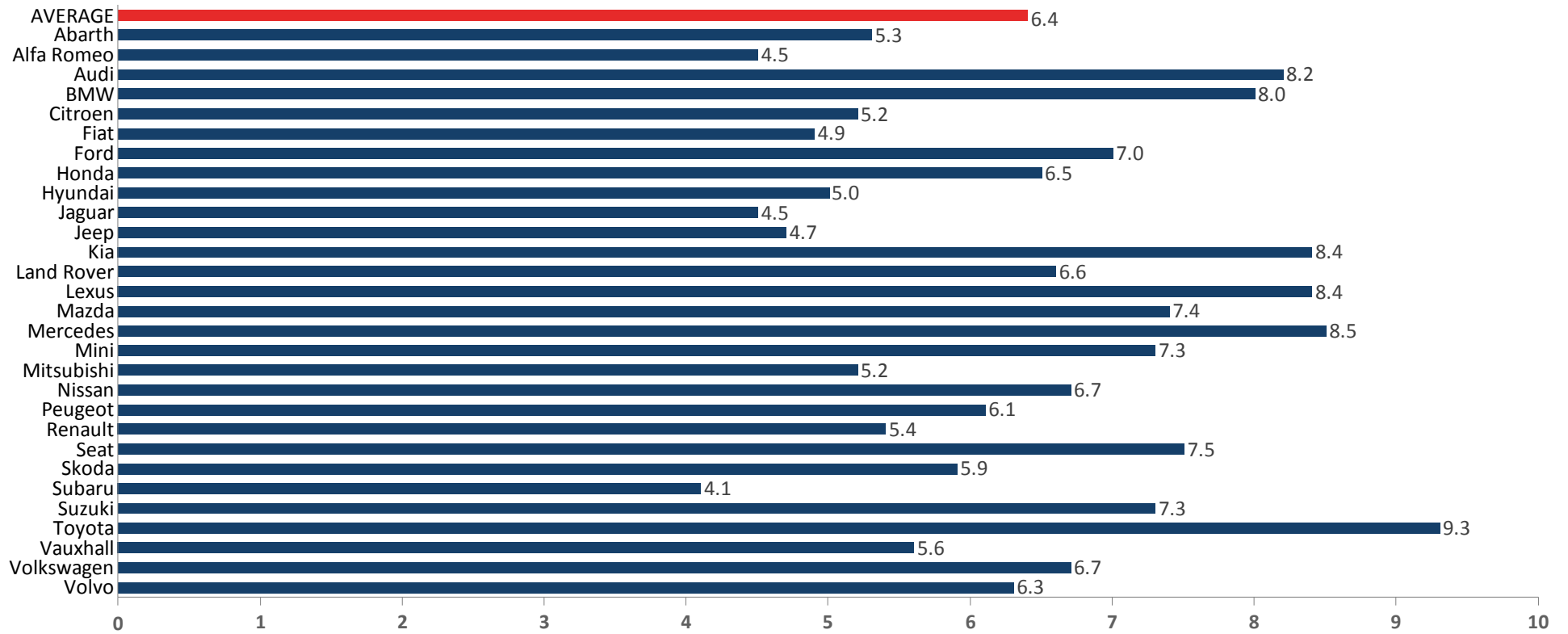


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.5	Ford	3.3	Land Rover	5.6	Nissan	3.4	Suzuki	7.3		
Alfa Romeo	3.3	Honda	4.4	Lexus	5.3	Peugeot	5.1	Toyota	5.4		
Audi	6.4	Hyundai	4.1	Mazda	7.2	Renault	5.7	Vauxhall	2.7		
BMW	4.9	Jaguar	4.2	Mercedes	8.0	Seat	6.3	Volkswagen	5.1		
Citroen	3.3	Jeep	2.1	Mini	5.4	Skoda	4.0	Volvo	5.8		
Fiat	4.3	Kia	7.8	Mitsubishi	5.0	Subaru	5.3			AVERAGE	4.9

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q6a. How satisfied are you with the competitiveness of your manufacturer's finance programme?

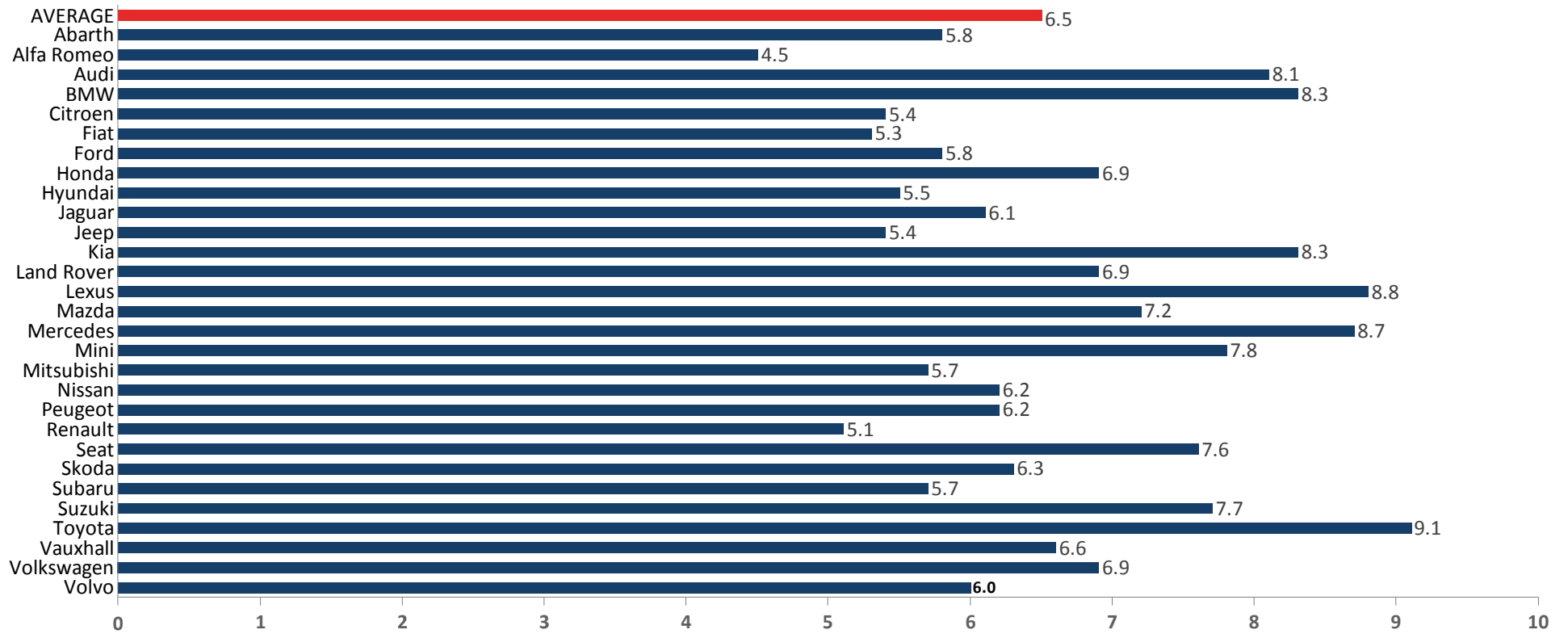


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.7	Ford	7.1	Land Rover	7.4	Nissan	5.6	Suzuki	7.5		
Afa Romeo	4.3	Honda	6.7	Lexus	7.8	Peugeot	5.9	Toyota	7.7		
Audi	7.6	Hyundai	5.5	Mazda	7.9	Renault	6.7	Vauxhall	6.0		
BMW	7.3	Jaguar	7.6	Mercedes	8.2	Seat	7.3	Volkswagen	7.1		
Citroen	5.8	Jeep	4.8	Mini	7.2	Skoda	6.2	Volvo	6.9		
Fiat	5.7	Kia	8.1	Mitsubishi	5.6	Subaru	5.0			AVERAGE	6.6

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q6b. How satisfied are you with the reasonableness of the finance targets set by your manufacturer?

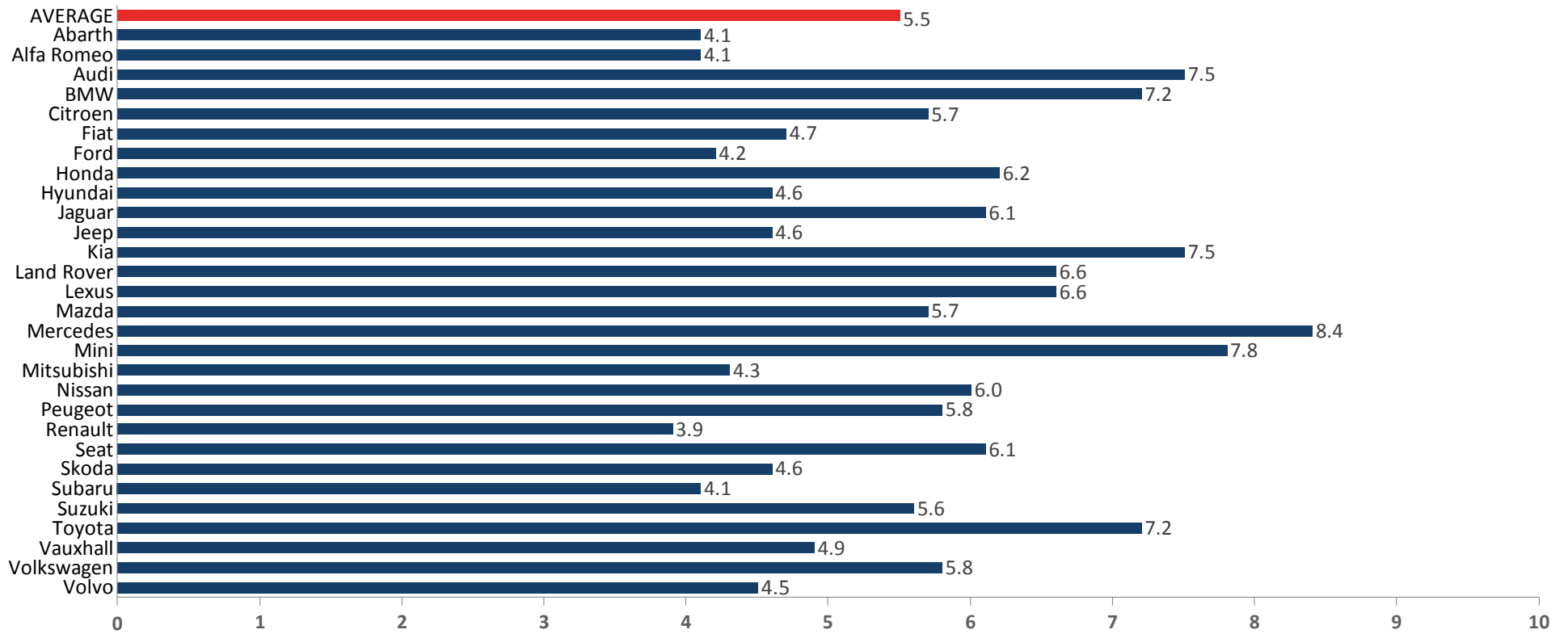


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.2	Ford	7.6	Land Rover	7.4	Nissan	4.3	Suzuki	7.5		
Alfa Romeo	4.9	Honda	7.1	Lexus	8.0	Peugeot	5.9	Toyota	7.7		
Audi	5.5	Hyundai	5.7	Mazda	7.9	Renault	6.7	Vauxhall	5.6		
BMW	7.1	Jaguar	7.1	Mercedes	8.5	Seat	7.3	Volkswagen	5.3		
Citroen	5.4	Jeep	5.2	Mini	7.1	Skoda	5.9	Volvo	5.4		
Fiat	5.1	Kia	8.1	Mitsubishi	5.5	Subaru	5.8			AVERAGE	6.3

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q6c. How satisfied are you with the earnings potential of your manufacturer's finance programme?

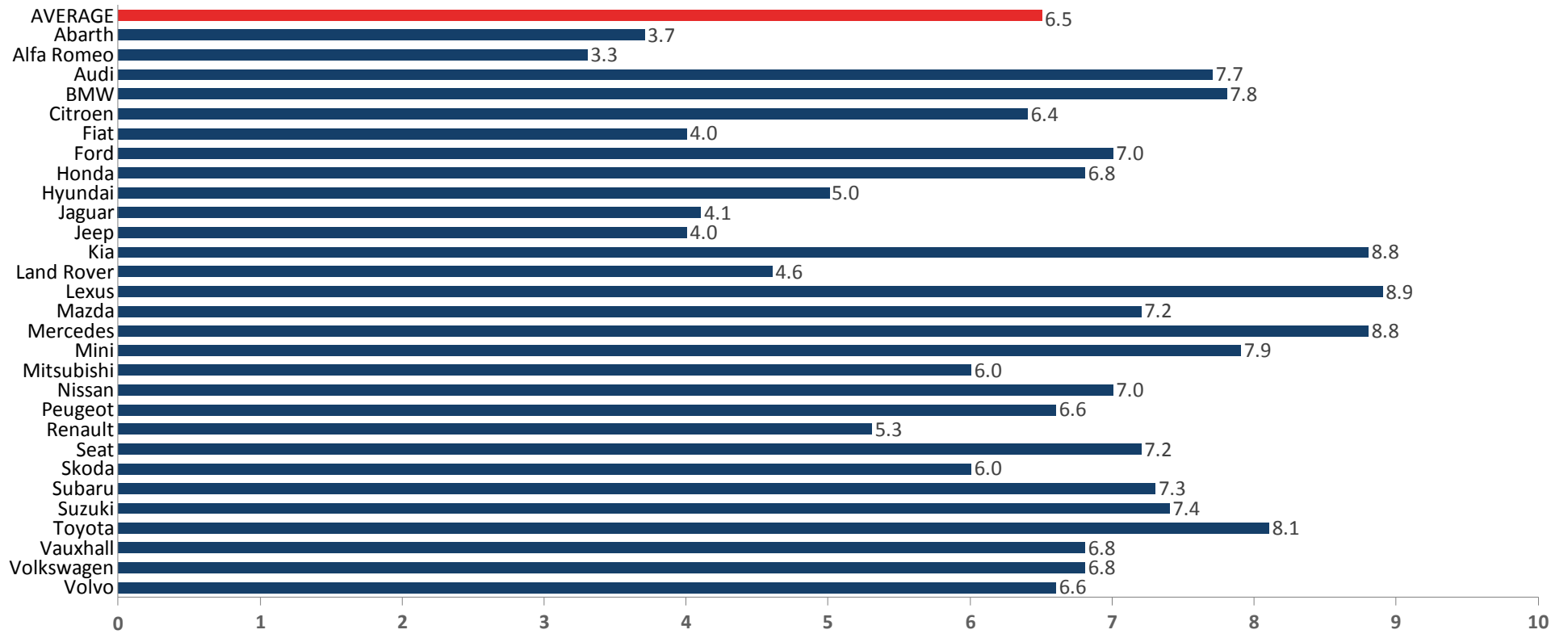


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.7	Ford	6.0	Land Rover	7.3	Nissan	5.0	Suzuki	6.1		
Alfa Romeo	4.4	Honda	6.3	Lexus	7.0	Peugeot	5.5	Toyota	6.0		
Audi	7.4	Hyundai	5.1	Mazda	6.4	Renault	6.0	Vauxhall	5.7		
BMW	7.5	Jaguar	7.0	Mercedes	8.0	Seat	6.5	Volkswagen	5.7		
Citroen	5.3	Jeep	5.5	Mini	7.6	Skoda	4.6	Volvo	5.1		
Fiat	5.5	Kia	7.4	Mitsubishi	4.3	Subaru	4.8			AVERAGE	5.9

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q7a. How satisfied are you with your manufacturer's used car standards?

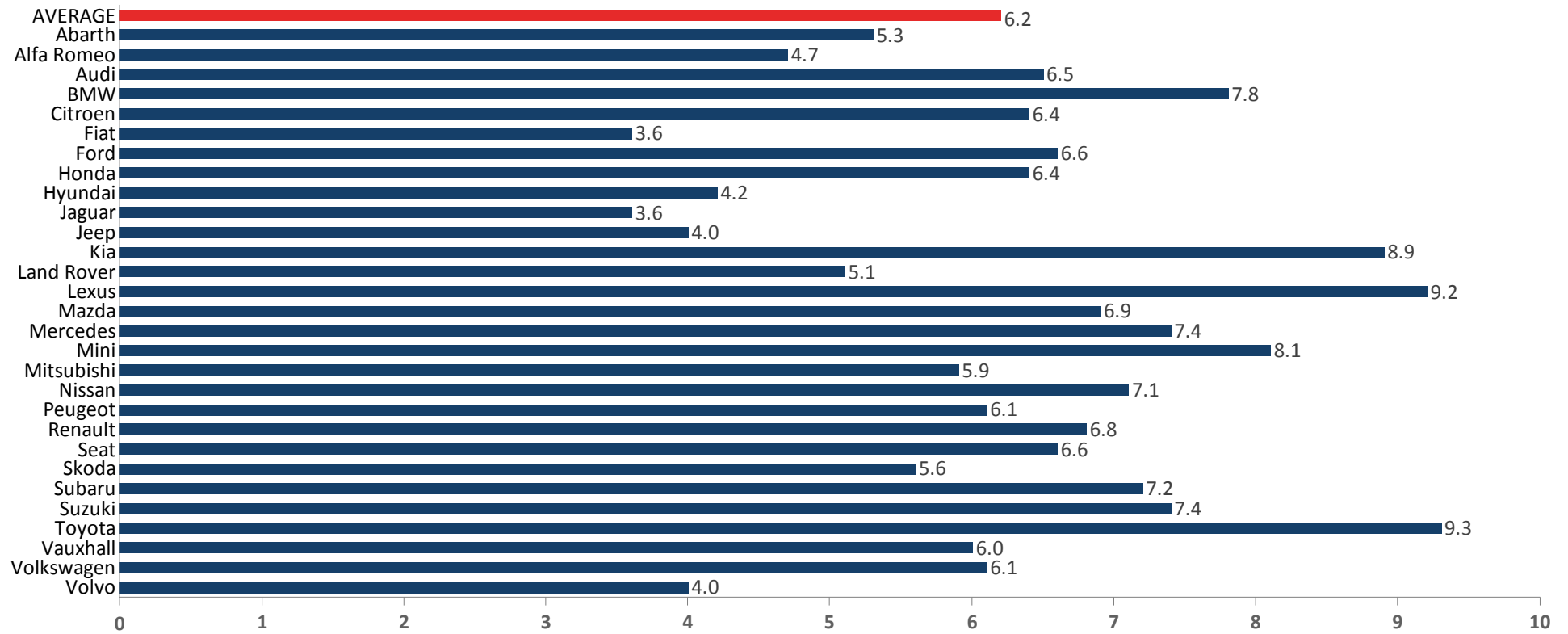


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.1	Ford	7.2	Land Rover	4.9	Nissan	5.4	Suzuki	7.9		
Alfa Romeo	5.1	Honda	7.1	Lexus	8.4	Peugeot	6.6	Toyota	7.2		
Audi	7.3	Hyundai	5.1	Mazda	7.7	Renault	6.8	Vauxhall	7.4		
BMW	8.1	Jaguar	5.1	Mercedes	8.8	Seat	7.6	Volkswagen	7.3		
Citroen	6.5	Jeep	4.5	Mini	7.9	Skoda	5.7	Volvo	7.2		
Fiat	5.3	Kia	8.5	Mitsubishi	5.0	Subaru	6.7			AVERAGE	6.8

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q7b. How satisfied are you with the targets set by your manufacturer for used cars?

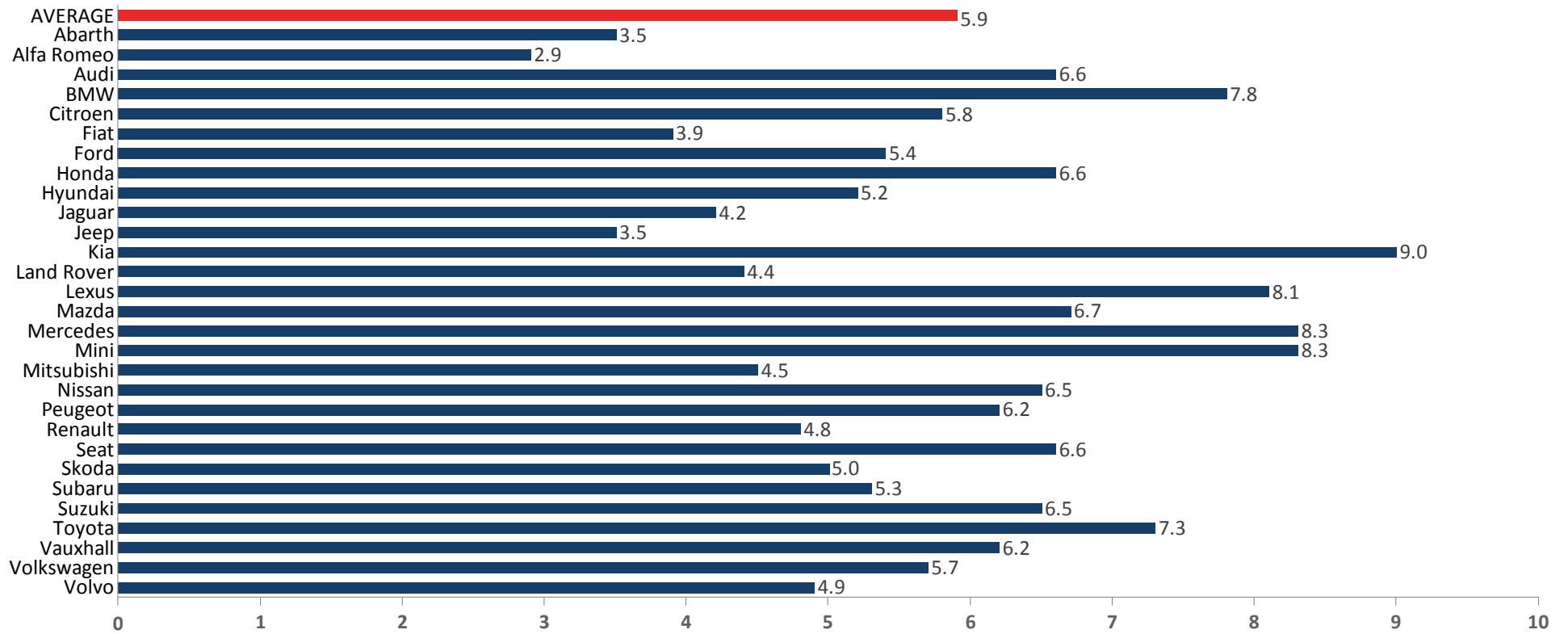


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.7	Ford	7.3	Land Rover	6.4	Nissan	5.5	Suzuki	8.8		
Alfa Romeo	7.0	Honda	7.2	Lexus	8.4	Peugeot	6.3	Toyota	6.1		
Audi	6.5	Hyundai	4.5	Mazda	7.4	Renault	6.5	Vauxhall	6.7		
BMW	8.1	Jaguar	5.2	Mercedes	8.4	Seat	7.5	Volkswagen	6.5		
Citroen	5.7	Jeep	3.6	Mini	7.8	Skoda	5.1	Volvo	4.5		
Fiat	6.1	Kia	8.6	Mitsubishi	5.0	Subaru	7.3			AVERAGE	6.5

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q7c. How satisfied are you with the cost and quality of your manufacturer's used car warranties?

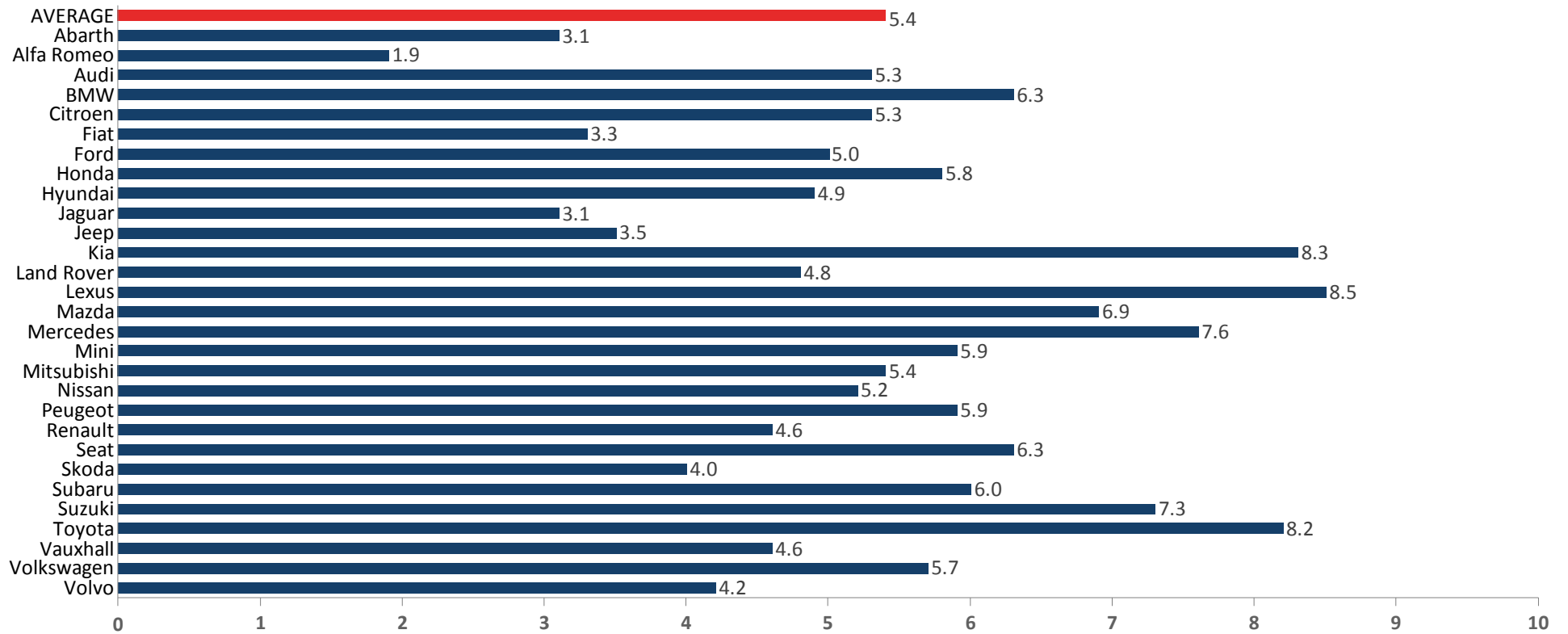


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	4.9	Ford	6.6	Land Rover	5.9	Nissan	5.3	Suzuki	6.8		
Alfa Romeo	4.0	Honda	7.1	Lexus	7.7	Peugeot	6.0	Toyota	6.4		
Audi	7.1	Hyundai	5.9	Mazda	7.3	Renault	6.6	Vauxhall	6.5		
BMW	7.9	Jaguar	4.8	Mercedes	8.0	Seat	6.4	Volkswagen	7.0		
Citroen	5.7	Jeep	3.5	Mini	8.0	Skoda	5.3	Volvo	6.0		
Fiat	4.6	Kia	8.8	Mitsubishi	4.4	Subaru	5.6			AVERAGE	6.3

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q8a. How satisfied are you with your manufacturer's target setting for aftersales?

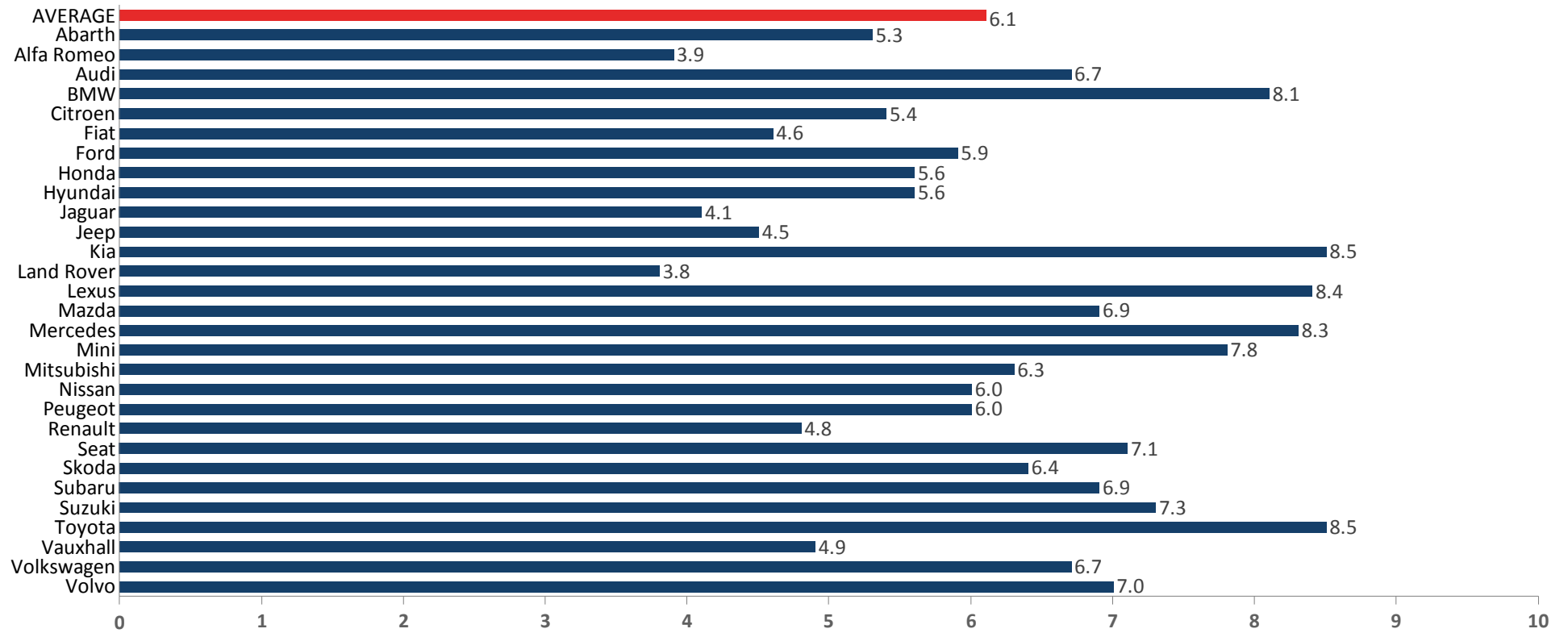


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	4.5	Ford	5.8	Land Rover	5.6	Nissan	4.6	Suzuki	7.2		
Alfa Romeo	3.0	Honda	6.8	Lexus	8.0	Peugeot	6.1	Toyota	7.3		
Audi	5.8	Hyundai	4.8	Mazda	7.3	Renault	6.6	Vauxhall	5.2		
BMW	4.9	Jaguar	5.2	Mercedes	7.2	Seat	6.3	Volkswagen	5.5		
Citroen	5.2	Jeep	3.1	Mini	5.2	Skoda	4.7	Volvo	4.9		
Fiat	4.2	Kia	8.2	Mitsubishi	5.2	Subaru	6.3			AVERAGE	5.8

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q8b. How satisfied are you with the quality of technical support?

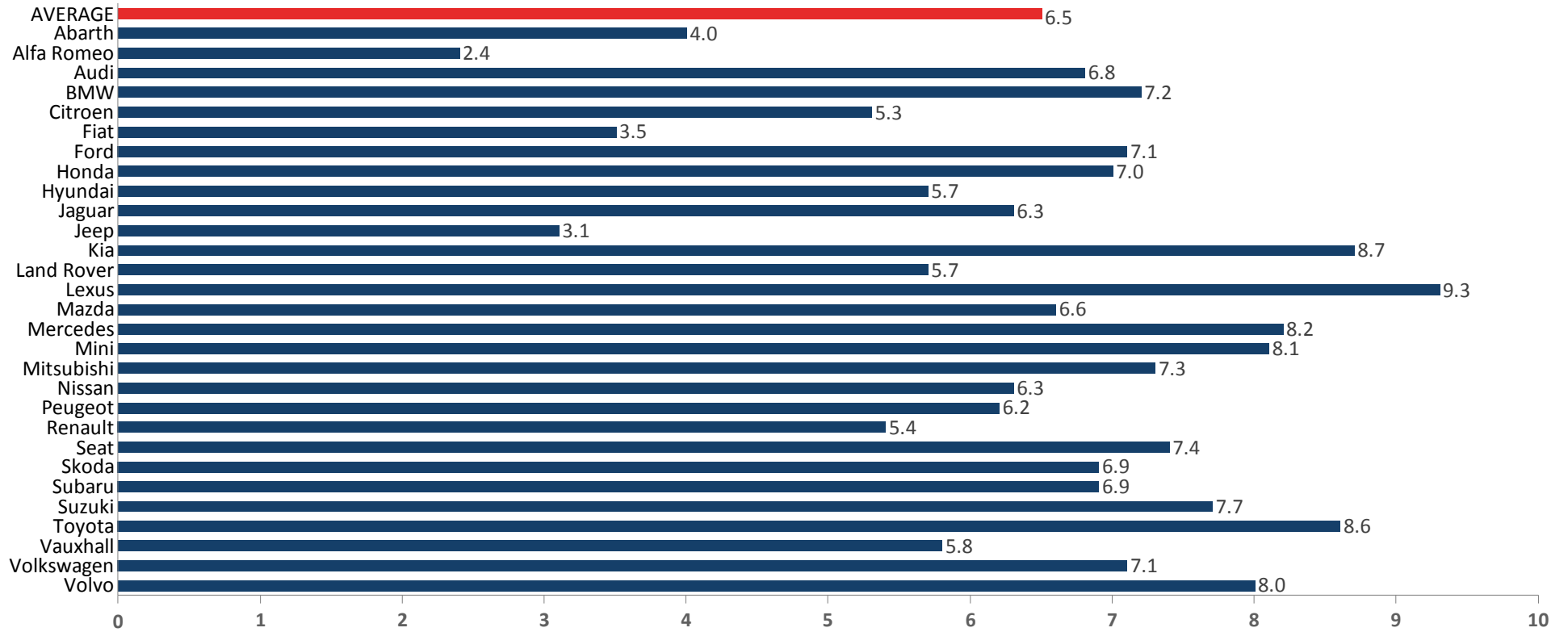


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.1	Ford	6.0	Land Rover	3.4	Nissan	5.4	Suzuki	7.0		
Alfa Romeo	4.2	Honda	6.9	Lexus	7.9	Peugeot	5.9	Toyota	8.3		
Audi	6.1	Hyundai	5.7	Mazda	7.3	Renault	7.0	Vauxhall	5.5		
BMW	8.4	Jaguar	3.3	Mercedes	7.5	Seat	7.2	Volkswagen	6.5		
Citroen	4.6	Jeep	4.0	Mini	8.5	Skoda	6.4	Volvo	6.9		
Fiat	3.8	Kia	8.1	Mitsubishi	5.8	Subaru	6.1			AVERAGE	6.2

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q8c. How satisfied are you with the availability of parts?

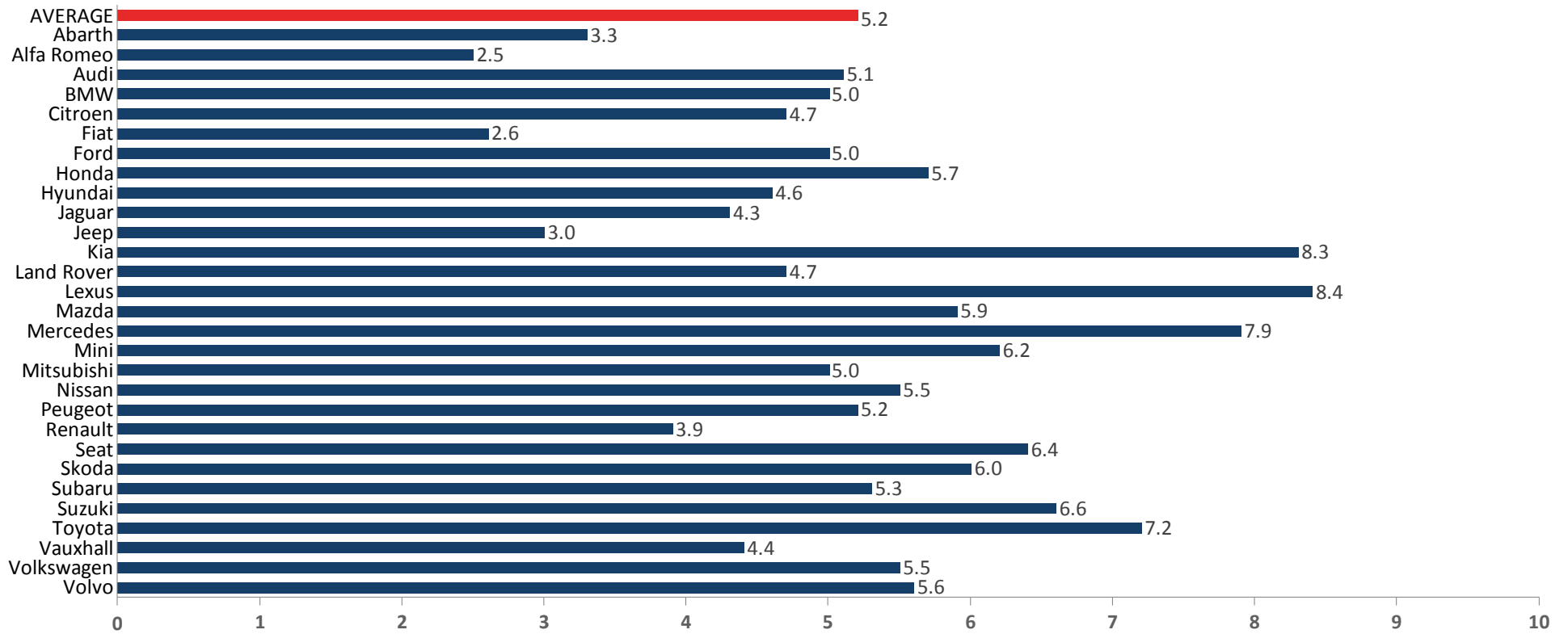


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.2	Ford	6.5	Land Rover	5.7	Nissan	5.9	Suzuki	7.7		
Alfa Romeo	4.4	Honda	7.6	Lexus	8.3	Peugeot	5.7	Toyota	7.6		
Audi	7.0	Hyundai	5.9	Mazda	5.6	Renault	6.9	Vauxhall	6.2		
BMW	6.7	Jaguar	5.9	Mercedes	7.9	Seat	7.5	Volkswagen	6.8		
Citroen	5.1	Jeep	4.2	Mini	6.5	Skoda	6.8	Volvo	8.1		
Fiat	4.5	Kia	8.2	Mitsubishi	6.6	Subaru	6.5			AVERAGE	6.5

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q8d. How satisfied are you with the price of manufacturer parts compared with parts factors?

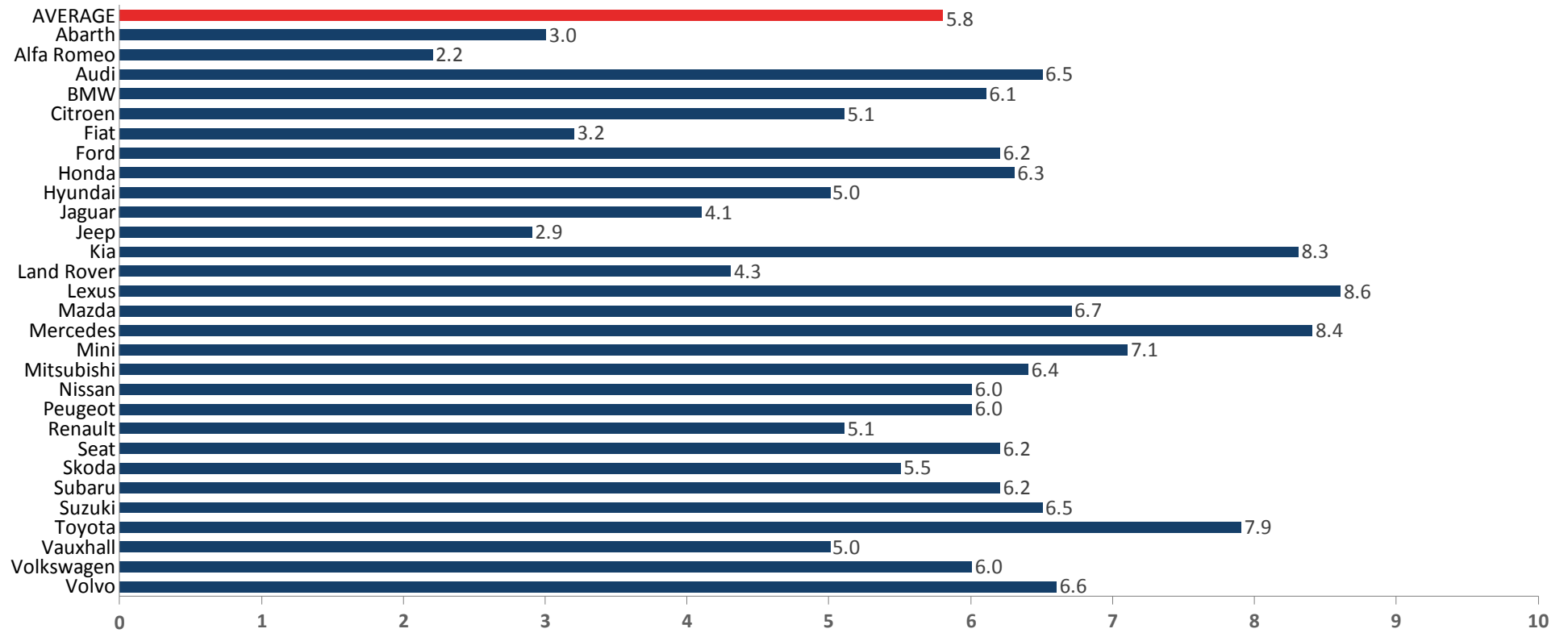


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	4.2	Ford	5.7	Land Rover	5.5	Nissan	5.0	Suzuki	6.9		
Alfa Romeo	3.6	Honda	6.4	Lexus	7.5	Peugeot	5.2	Toyota	6.5		
Audi	5.6	Hyundai	4.9	Mazda	6.0	Renault	5.7	Vauxhall	4.9		
BMW	4.4	Jaguar	5.1	Mercedes	6.3	Seat	5.9	Volkswagen	5.7		
Citroen	4.3	Jeep	3.3	Mini	4.5	Skoda	5.3	Volvo	6.3		
Fiat	3.8	Kia	7.9	Mitsubishi	5.1	Subaru	5.0			AVERAGE	5.5

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q8e. How satisfied are you with the service retained earnings?

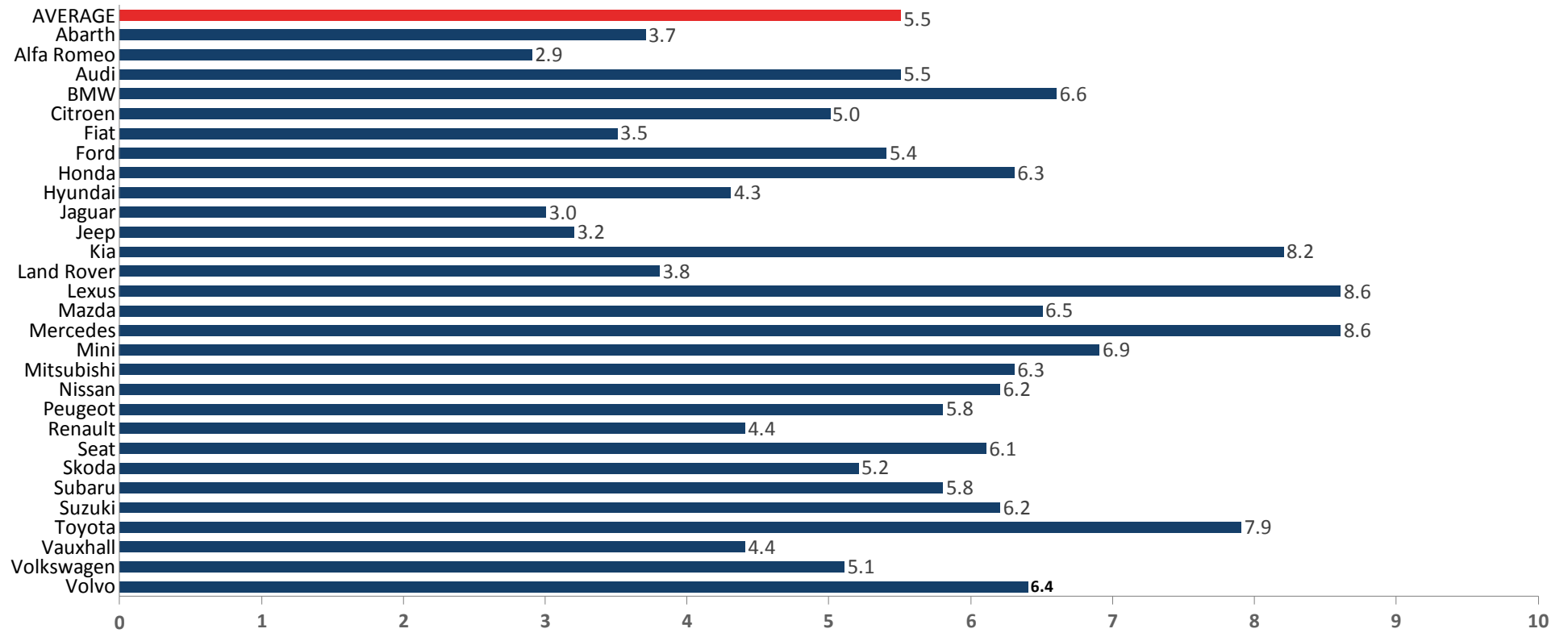


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.3	Ford	5.3	Land Rover	5.7	Nissan	5.0	Suzuki	7.1		
Alfa Romeo	3.6	Honda	6.8	Lexus	7.8	Peugeot	5.7	Toyota	6.8		
Audi	6.7	Hyundai	5.1	Mazda	6.8	Renault	6.4	Vauxhall	5.3		
BMW	7.7	Jaguar	5.1	Mercedes	8.6	Seat	5.9	Volkswagen	5.7		
Citroen	5.2	Jeep	3.5	Mini	7.5	Skoda	5.3	Volvo	7.1		
Fiat	3.9	Kia	8.1	Mitsubishi	5.4	Subaru	5.9			AVERAGE	6.0

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q8f. How satisfied are you with your manufacturer's service plan rates and recovery?

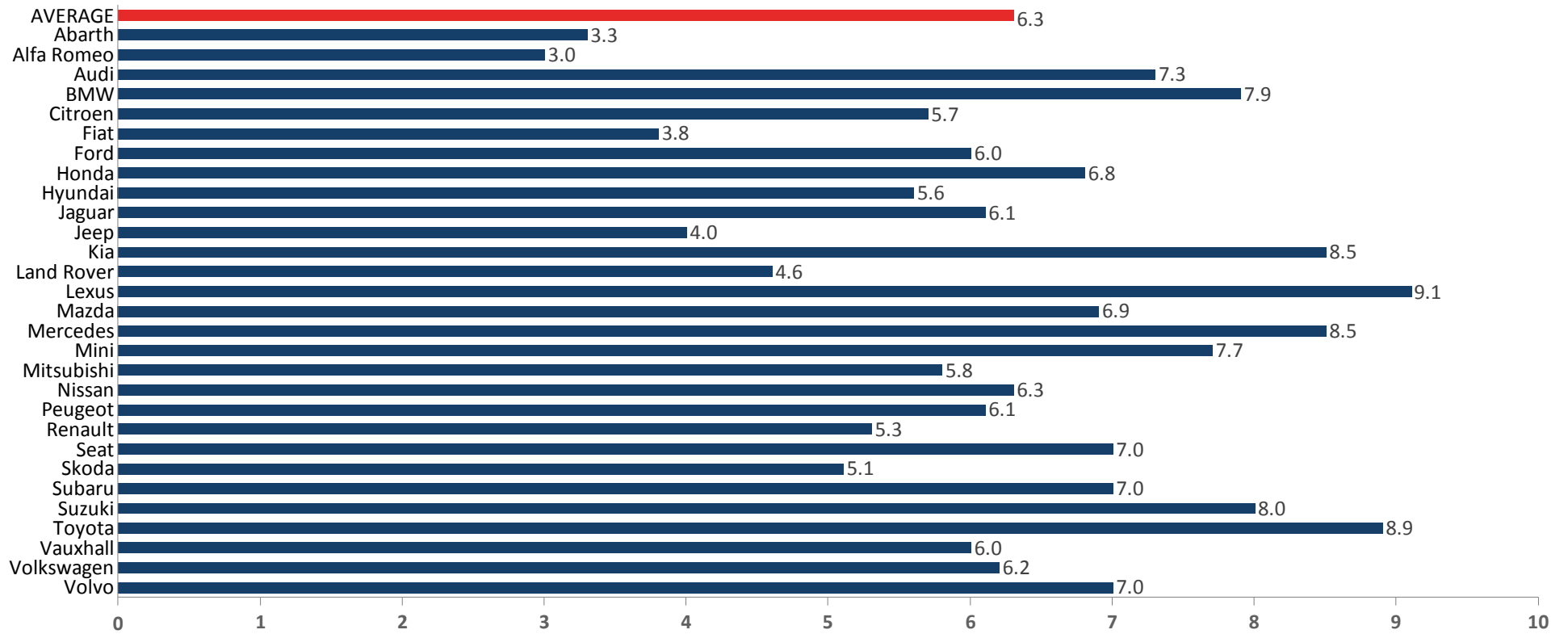


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.3	Ford	5.6	Land Rover	4.5	Nissan	4.8	Suzuki	6.5		
Alfa Romeo	3.5	Honda	6.8	Lexus	7.8	Peugeot	5.7	Toyota	6.9		
Audi	6.0	Hyundai	4.7	Mazda	6.6	Renault	5.9	Vauxhall	5.0		
BMW	8.0	Jaguar	4.4	Mercedes	8.1	Seat	5.5	Volkswagen	5.2		
Citroen	3.7	Jeep	3.4	Mini	8.1	Skoda	4.6	Volvo	6.8		
Fiat	4.4	Kia	8.3	Mitsubishi	5.8	Subaru	4.8			AVERAGE	5.7

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q8g. How satisfied are you with the fairness of your manufacturer's warranty policy for you and your customers?

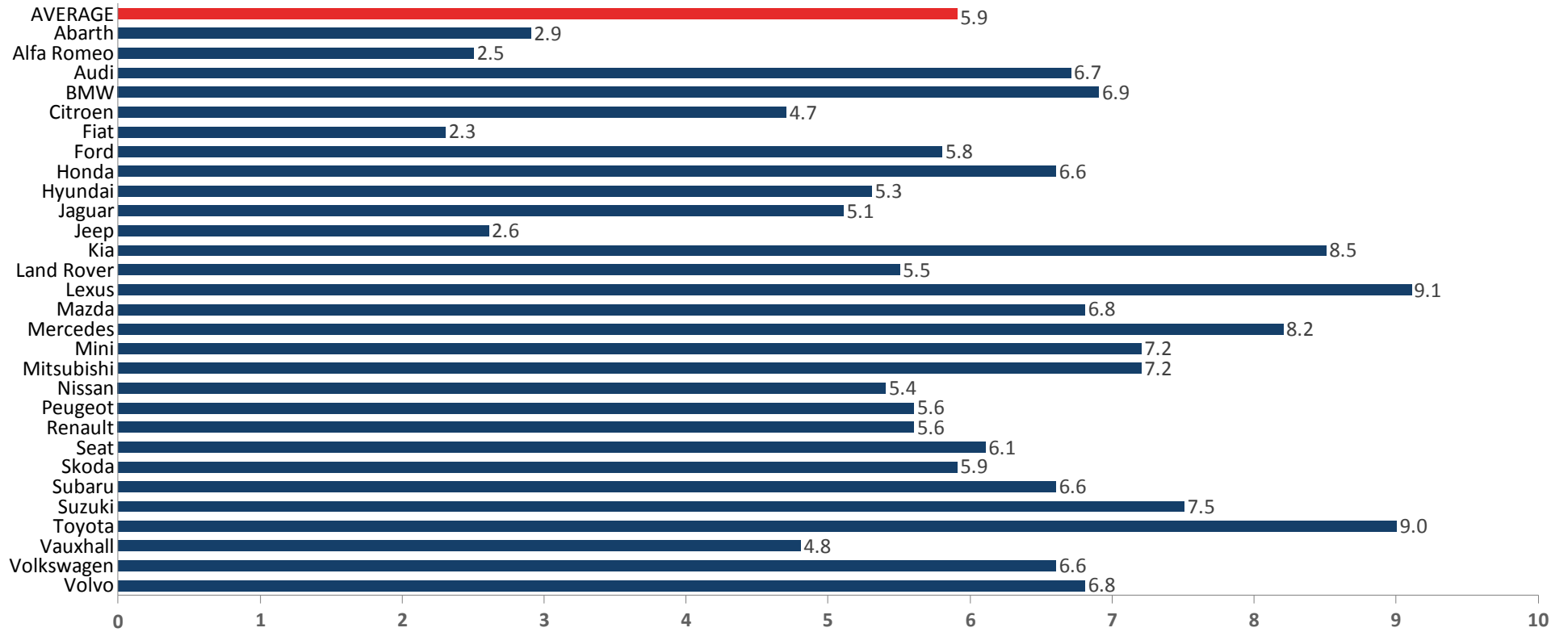


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.1	Ford	6.3	Land Rover	5.8	Nissan	5.5	Suzuki	7.9		
Alfa Romeo	4.1	Honda	7.6	Lexus	8.7	Peugeot	6.2	Toyota	8.4		
Audi	6.8	Hyundai	5.9	Mazda	7.3	Renault	6.8	Vauxhall	5.9		
BMW	7.5	Jaguar	6.2	Mercedes	8.6	Seat	6.3	Volkswagen	6.1		
Citroen	4.8	Jeep	4.7	Mini	7.3	Skoda	5.1	Volvo	7.1		
Fiat	4.7	Kia	8.7	Mitsubishi	5.5	Subaru	6.4			AVERAGE	6.5

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q8h. How satisfied are you with the fairness of your manufacturer's stocking policy for parts/accessories?

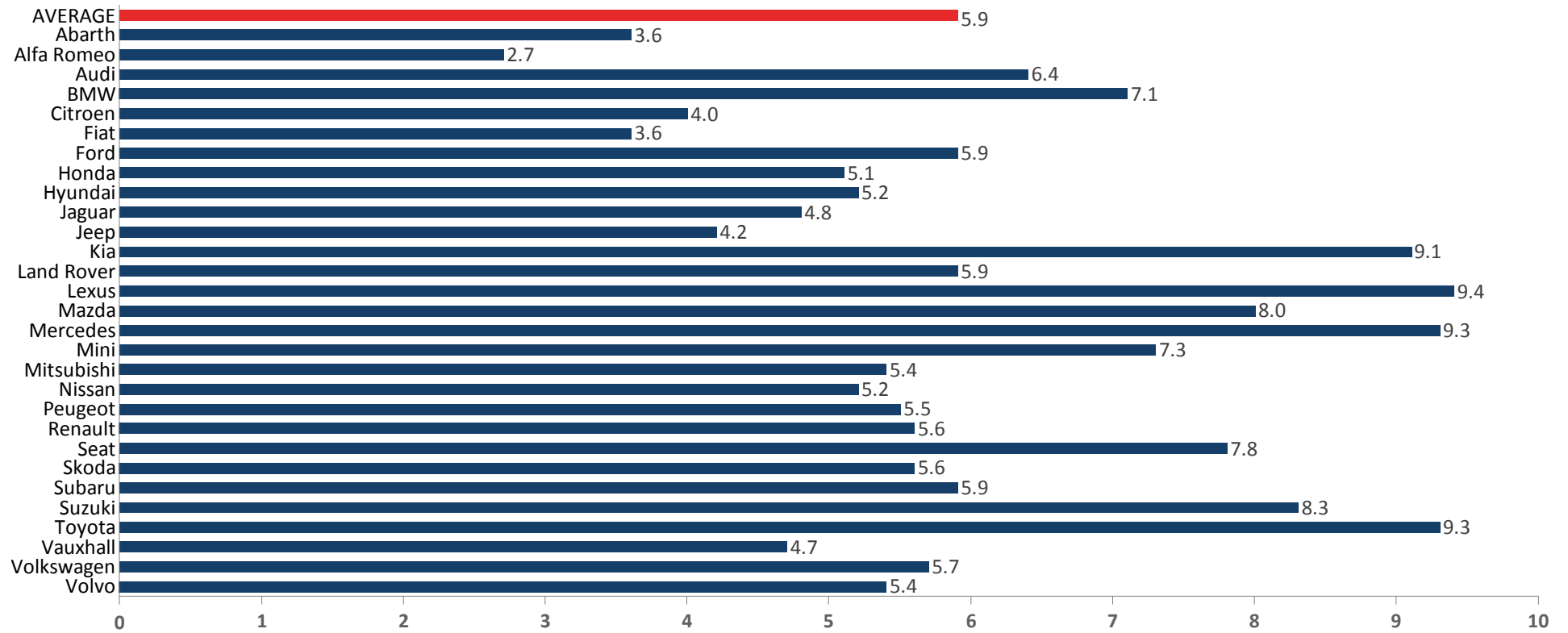


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	3.8	Ford	5.8	Land Rover	6.1	Nissan	5.0	Suzuki	7.5		
Alfa Romeo	2.8	Honda	7.3	Lexus	8.7	Peugeot	5.4	Toyota	8.6		
Audi	6.4	Hyundai	5.5	Mazda	6.9	Renault	6.8	Vauxhall	5.8		
BMW	7.4	Jaguar	6.2	Mercedes	8.2	Seat	5.9	Volkswagen	6.4		
Citroen	4.7	Jeep	3.4	Mini	7.7	Skoda	5.7	Volvo	7.6		
Fiat	3.4	Kia	8.5	Mitsubishi	6.3	Subaru	6.9			AVERAGE	6.3

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9a. How satisfied are you with your ability to do business with your manufacturer on a day-to-day basis?

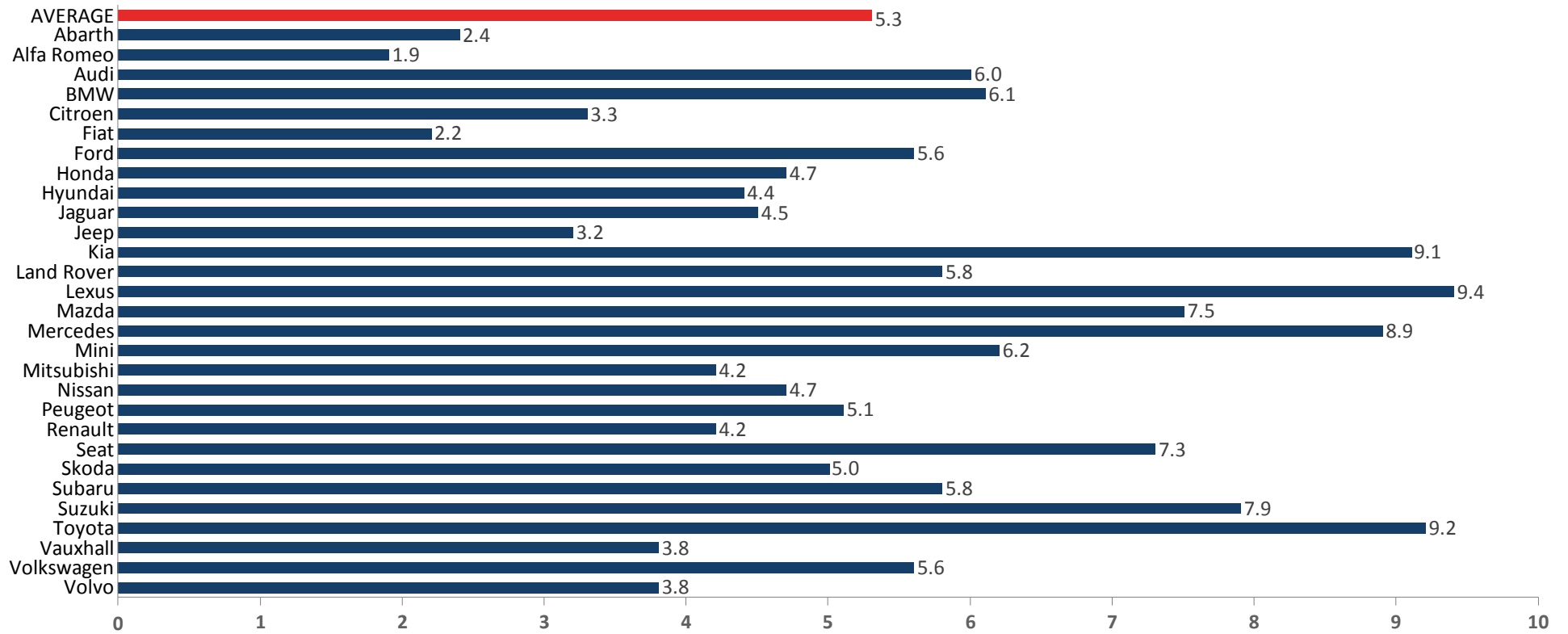


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.8	Ford	6.3	Land Rover	5.6	Nissan	2.9	Suzuki	8.0		
Alfa Romeo	4.3	Honda	6.9	Lexus	9.1	Peugeot	5.8	Toyota	7.9		
Audi	6.4	Hyundai	5.5	Mazda	8.1	Renault	7.0	Vauxhall	5.7		
BMW	5.9	Jaguar	4.4	Mercedes	9.3	Seat	7.4	Volkswagen	6.1		
Citroen	3.7	Jeep	4.4	Mini	6.2	Skoda	5.6	Volvo	5.0		
Fiat	5.5	Kia	9.2	Mitsubishi	5.1	Subaru	6.4			AVERAGE	6.2

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9b. How satisfied are you that the management of your manufacturer actually takes dealers views and opinions into account?

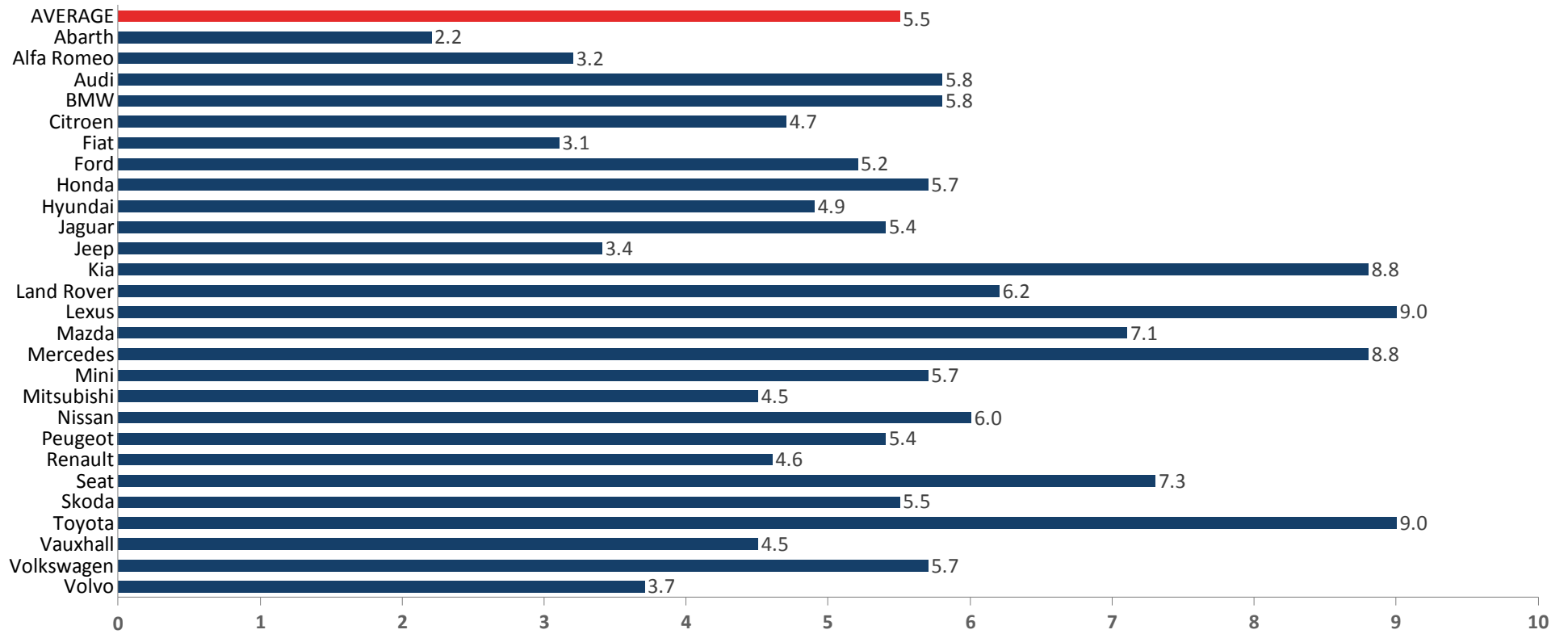


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.5	Ford	5.4	Land Rover	5.1	Nissan	2.3	Suzuki	7.8		
Alfa Romeo	3.3	Honda	6.3	Lexus	9.0	Peugeot	5.6	Toyota	7.9		
Audi	5.7	Hyundai	5.0	Mazda	7.4	Renault	6.0	Vauxhall	4.2		
BMW	5.0	Jaguar	4.8	Mercedes	9.2	Seat	6.9	Volkswagen	5.9		
Citroen	3.1	Jeep	3.6	Mini	5.8	Skoda	5.0	Volvo	3.8		
Fiat	4.2	Kia	9.1	Mitsubishi	4.1	Subaru	5.7			AVERAGE	5.5

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9c. How satisfied are you with your manufacturer's dealer council/franchise board?

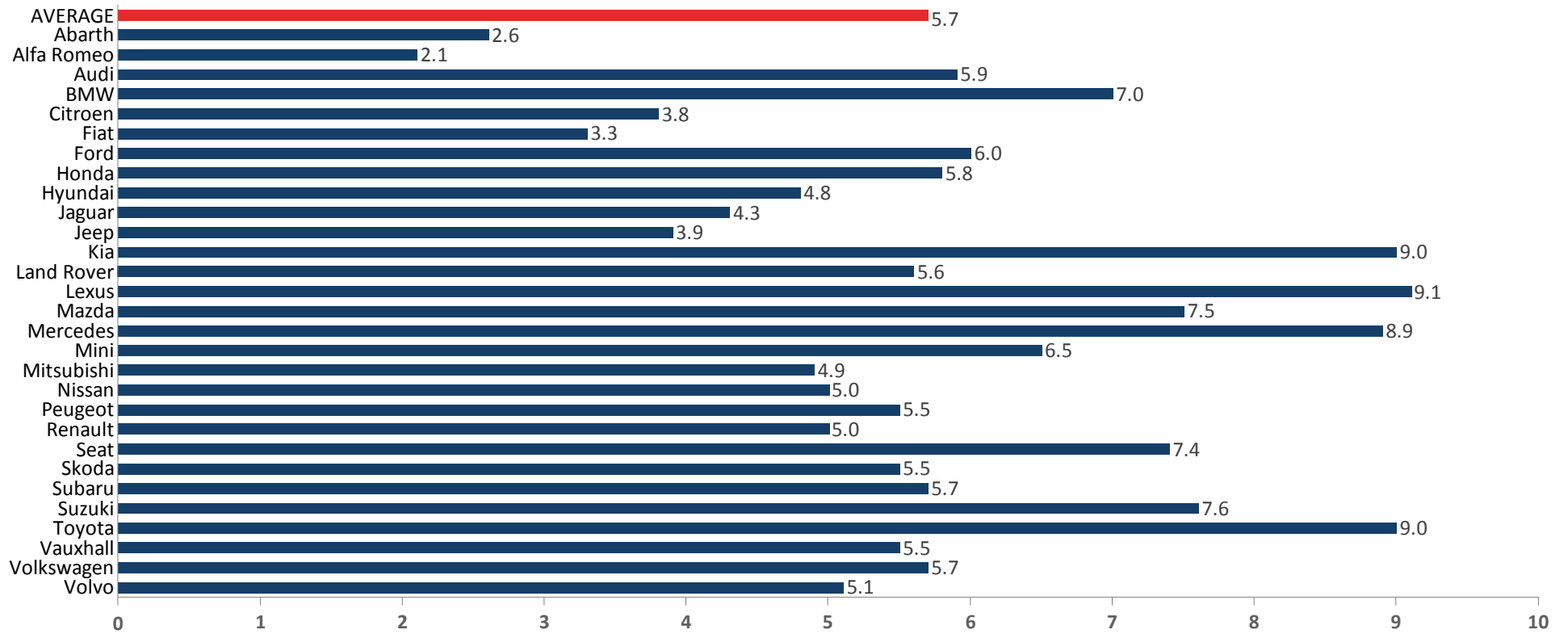


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	4.3	Honda	5.7	Lexus	8.7	Peugeot	5.8	Volkswagen	5.8		
Alfa Romeo	2.7	Hyundai	5.3	Mazda	7.2	Renault	6.3	Volvo	3.6		
Audi	5.6	Jaguar	6.7	Mercedes	9.0	Seat	6.9				
BMW	5.1	Jeep	3.3	Mini	5.2	Skoda	5.0				
Citroen	4.8	Kia	8.9	Mitsubishi	4.5	Toyota	7.9				
Ford	4.7	Land Rover	6.1	Nissan	3.9	Vauxhall	4.9			AVERAGE	5.7

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9d. How satisfied are you with your manufacturer's response to your communications with them?

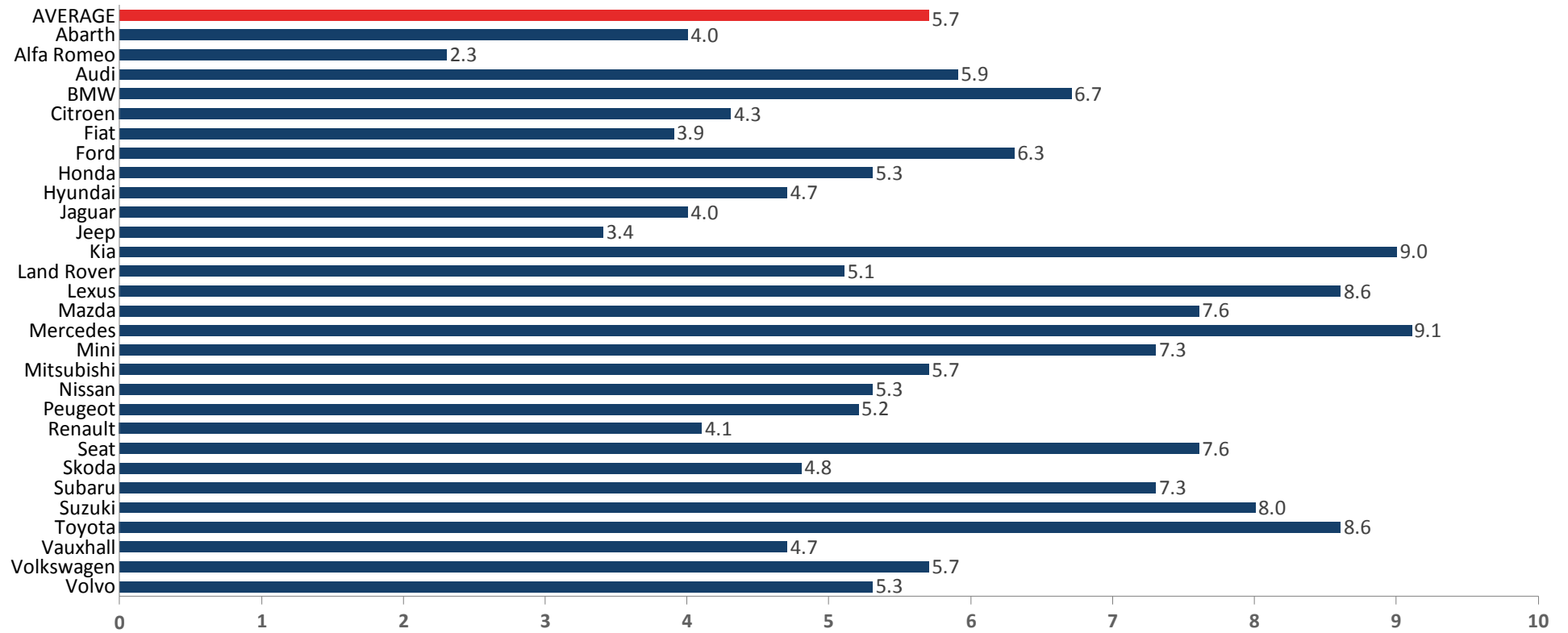


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.5	Ford	6.5	Land Rover	5.3	Nissan	2.6	Suzuki	7.7		
Alfa Romeo	3.7	Honda	6.7	Lexus	8.7	Peugeot	5.6	Toyota	7.9		
Audi	5.9	Hyundai	5.1	Mazda	7.7	Renault	6.2	Vauxhall	5.7		
BMW	6.1	Jaguar	5.1	Mercedes	8.7	Seat	6.9	Volkswagen	5.9		
Citroen	3.5	Jeep	3.7	Mini	6.1	Skoda	4.9	Volvo	5.2		
Fiat	5.1	Kia	9.1	Mitsubishi	4.6	Subaru	5.7			AVERAGE	5.9

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9e. How satisfied are you that your manufacturer dealer standards are fair and reasonable?

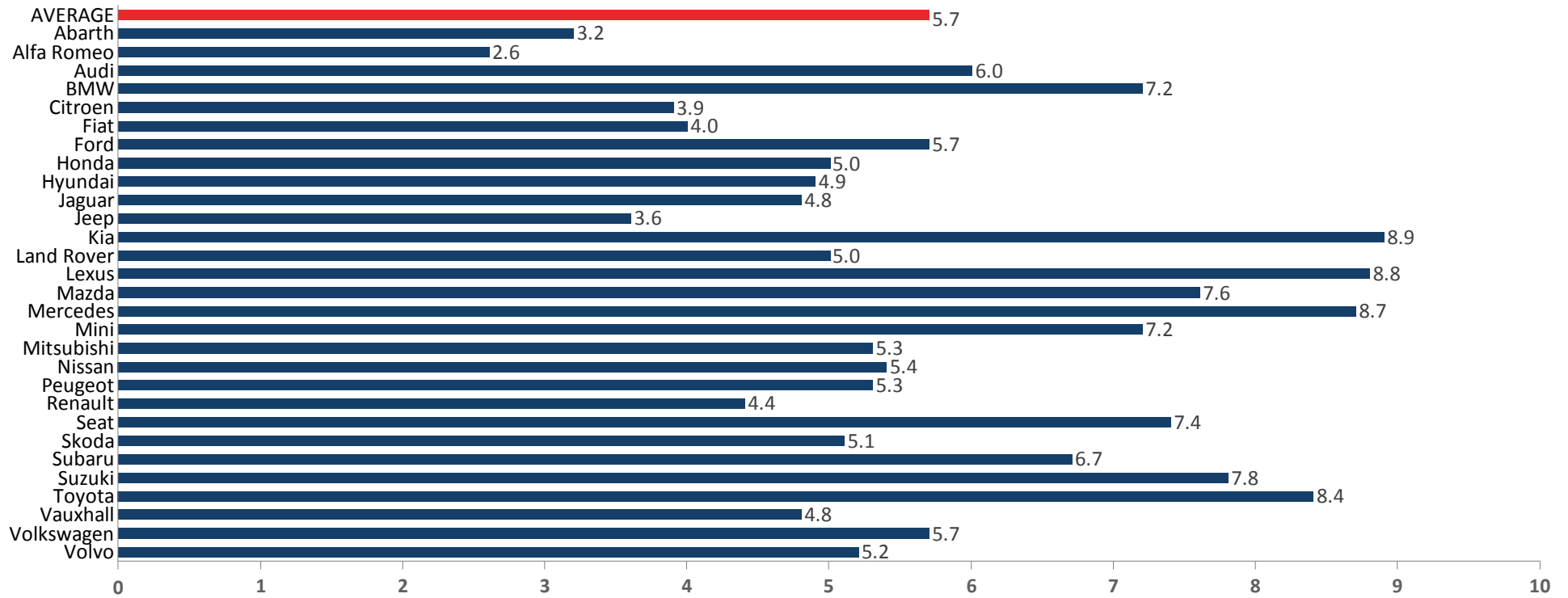


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.9	Ford	6.0	Land Rover	4.9	Nissan	3.4	Suzuki	8.4		
Alfa Romeo	3.6	Honda	6.5	Lexus	8.7	Peugeot	5.7	Toyota	7.7		
Audi	6.5	Hyundai	5.2	Mazda	8.1	Renault	6.3	Vauxhall	4.8		
BMW	7.2	Jaguar	4.0	Mercedes	8.9	Seat	7.0	Volkswagen	6.1		
Citroen	3.5	Jeep	3.5	Mini	7.5	Skoda	5.3	Volvo	6.4		
Fiat	5.1	Kia	9.0	Mitsubishi	5.1	Subaru	7.3			AVERAGE	6.0

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9f. How satisfied are you that the performance measures used by your manufacturer on your business are fair and reasonable?

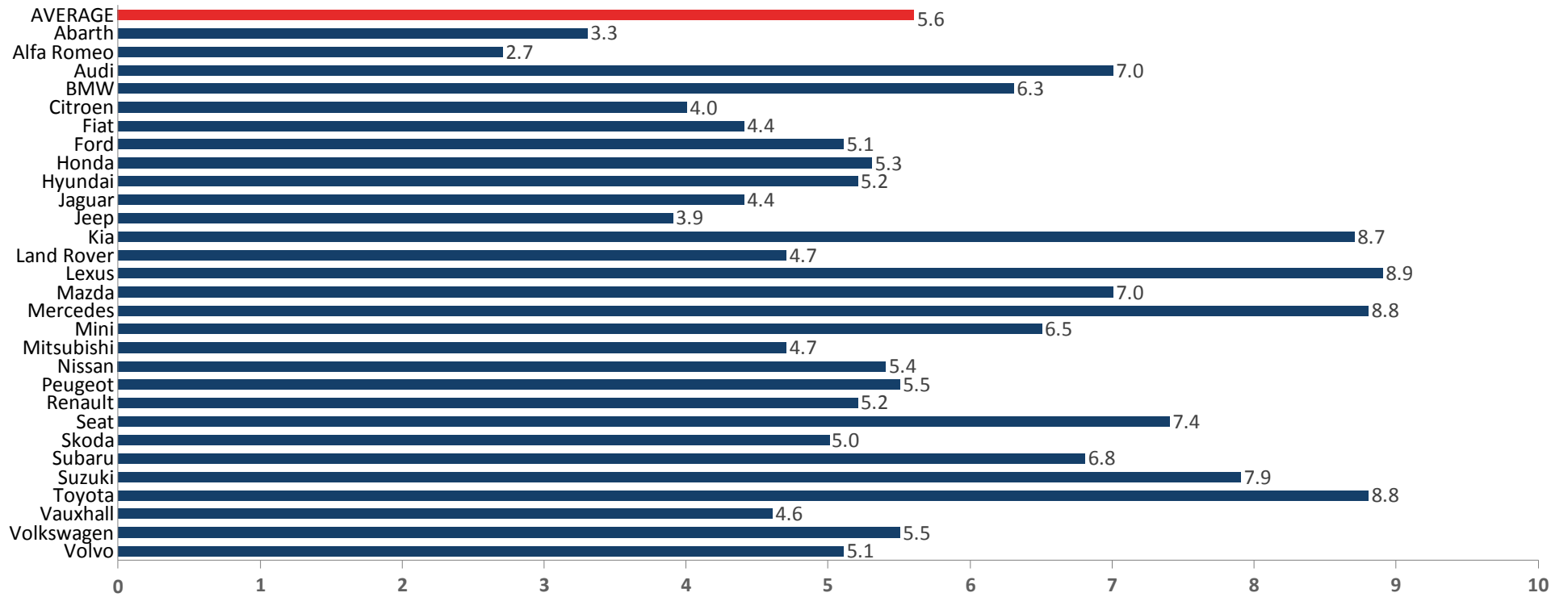


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.6	Ford	5.9	Land Rover	5.5	Nissan	3.0	Suzuki	8.1		
Alfa Romeo	4.1	Honda	6.1	Lexus	8.4	Peugeot	5.7	Toyota	8.0		
Audi	6.3	Hyundai	5.2	Mazda	7.6	Renault	6.4	Vauxhall	4.8		
BMW	7.2	Jaguar	4.4	Mercedes	8.7	Seat	6.7	Volkswagen	5.8		
Citroen	3.5	Jeep	3.7	Mini	7.3	Skoda	5.2	Volvo	5.6		
Fiat	5.2	Kia	9.0	Mitsubishi	5.1	Subaru	6.6			AVERAGE	5.9

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9g. How satisfied are you with the penalties and escalation process for weak performance used by your manufacturer are fair and reasonable?

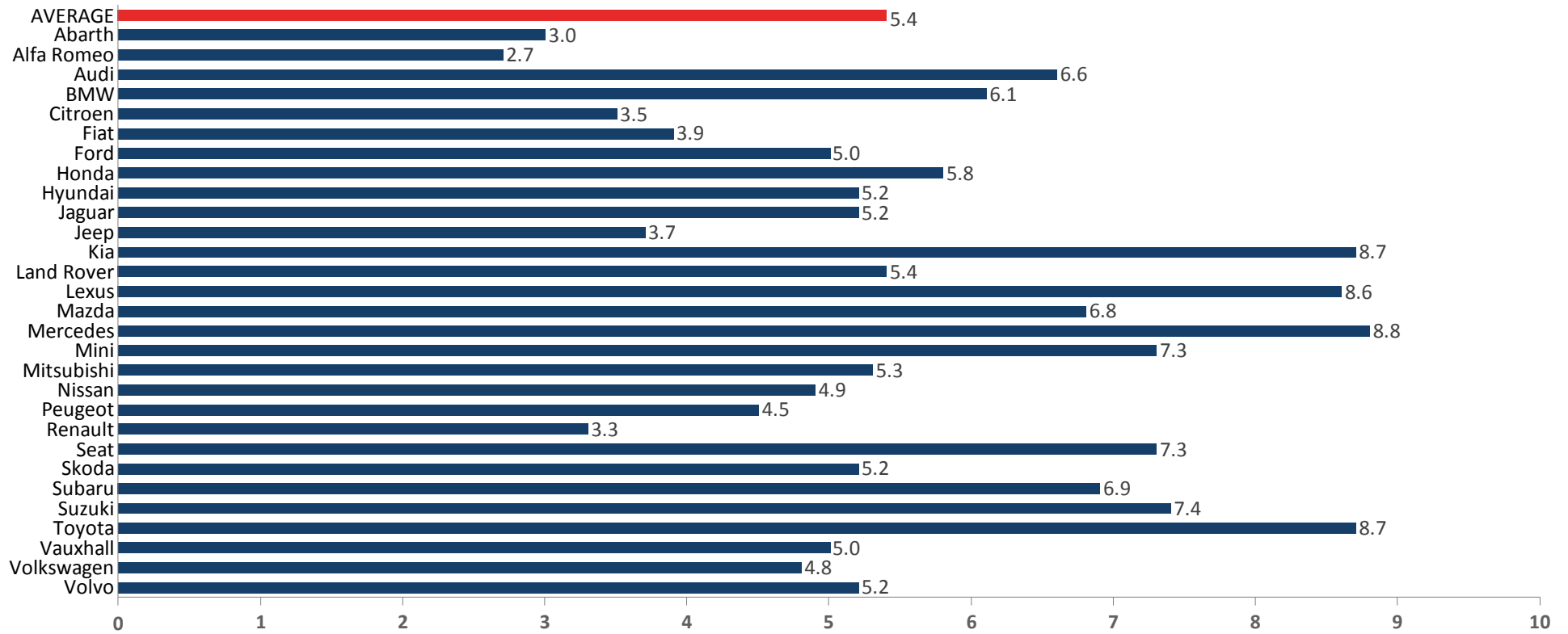


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.7	Ford	5.0	Land Rover	4.9	Nissan	2.8	Suzuki	7.6		
Alfa Romeo	3.9	Honda	6.5	Lexus	8.1	Peugeot	5.2	Toyota	7.3		
Audi	6.3	Hyundai	5.2	Mazda	7.5	Renault	5.9	Vauxhall	4.9		
BMW	6.9	Jaguar	4.7	Mercedes	8.6	Seat	7.3	Volkswagen	5.9		
Citroen	3.3	Jeep	3.8	Mini	7.5	Skoda	4.5	Volvo	5.5		
Fiat	5.6	Kia	8.7	Mitsubishi	4.6	Subaru	6.8			AVERAGE	5.8

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9h. How satisfied are you with the incentives and penalty regime that underpins your manufacturer's CSI programme?

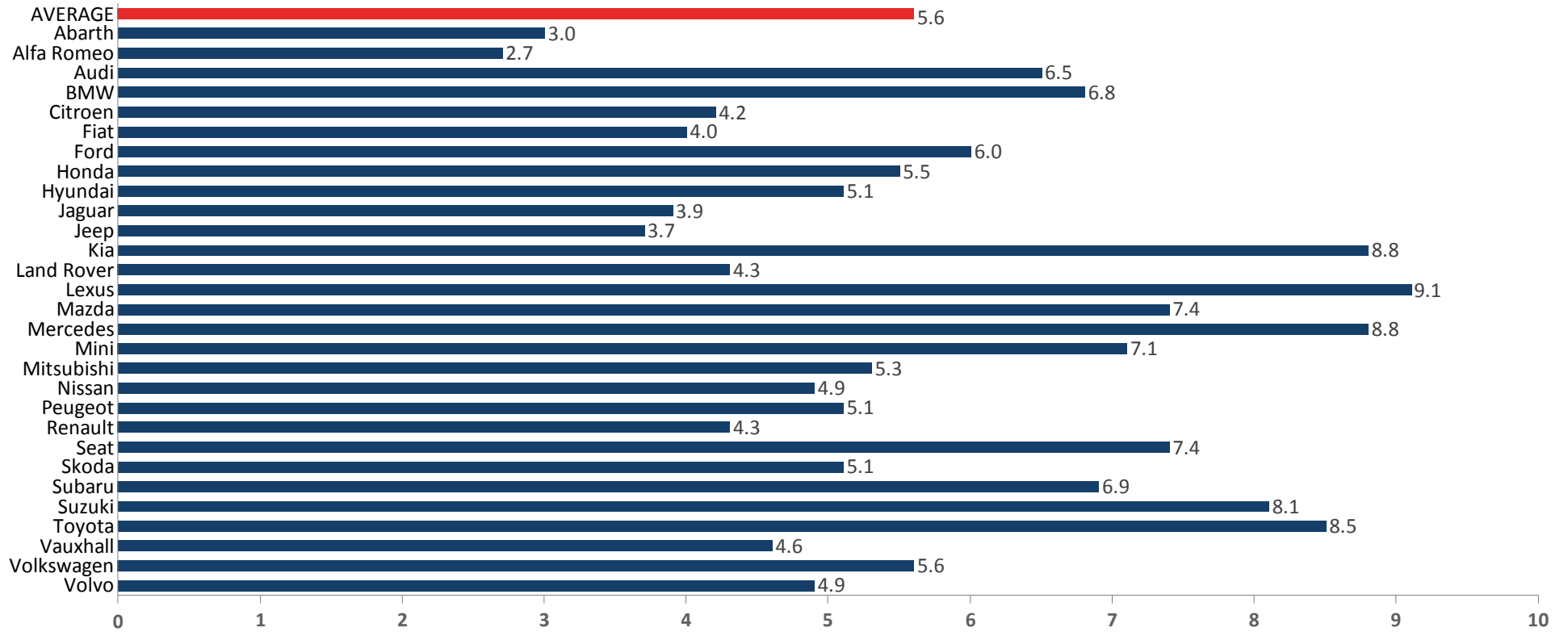


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.1	Ford	5.2	Land Rover	5.4	Nissan	2.8	Suzuki	8.0		
Alfa Romeo	3.4	Honda	7.0	Lexus	8.2	Peugeot	4.6	Toyota	7.8		
Audi	6.1	Hyundai	5.2	Mazda	7.3	Renault	5.2	Vauxhall	4.8		
BMW	6.8	Jaguar	5.0	Mercedes	8.7	Seat	7.2	Volkswagen	5.4		
Citroen	3.2	Jeep	3.5	Mini	7.1	Skoda	4.2	Volvo	5.9		
Fiat	5.1	Kia	8.2	Mitsubishi	4.7	Subaru	6.6			AVERAGE	5.6

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9i. How satisfied are you with your manufacturer's procedures and controls on your business are fair and reasonable?

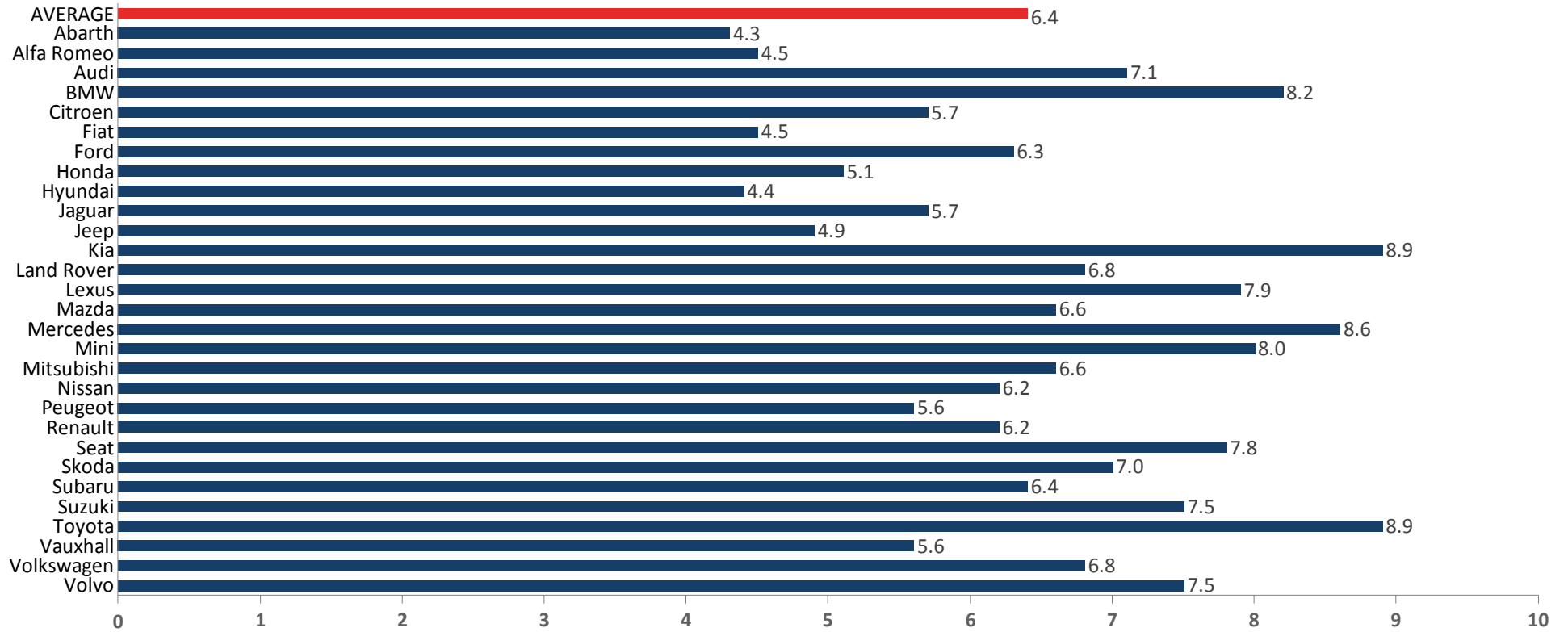


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.7	Ford	6.0	Land Rover	5.1	Nissan	2.9	Suzuki	8.1		
Alfa Romeo	4.1	Honda	5.6	Lexus	8.7	Peugeot	5.4	Toyota	7.6		
Audi	6.5	Hyundai	5.3	Mazda	7.5	Renault	6.2	Vauxhall	4.8		
BMW	7.0	Jaguar	4.4	Mercedes	8.7	Seat	6.8	Volkswagen	5.6		
Citroen	3.4	Jeep	3.8	Mini	7.2	Skoda	4.5	Volvo	5.4		
Fiat	5.3	Kia	8.8	Mitsubishi	4.9	Subaru	6.9			AVERAGE	5.8

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9k. How satisfied are you with the quality of your manufacturer's training?

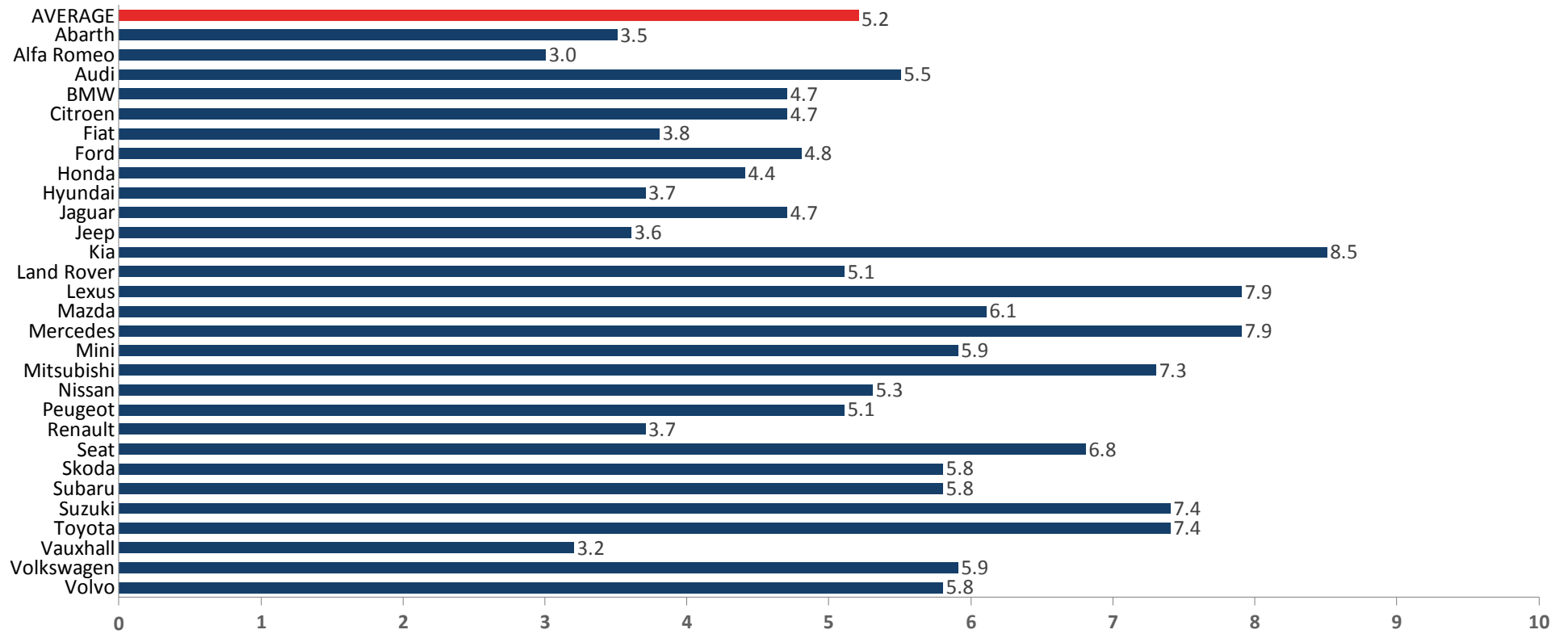


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	7.1	Ford	5.9	Land Rover	6.0	Nissan	5.8	Suzuki	7.3		
Alfa Romeo	3.8	Honda	5.8	Lexus	8.6	Peugeot	6.3	Toyota	7.8		
Audi	7.8	Hyundai	5.3	Mazda	7.5	Renault	7.0	Vauxhall	5.3		
BMW	7.4	Jaguar	5.2	Mercedes	8.1	Seat	7.7	Volkswagen	7.5		
Citroen	5.8	Jeep	4.8	Mini	7.2	Skoda	6.5	Volvo	7.3		
Fiat	4.8	Kia	9.0	Mitsubishi	6.5	Subaru	6.5			AVERAGE	6.6

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q9I. How satisfied are you with the cost of manufacturer's training?



PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.2	Ford	4.7	Land Rover	5.9	Nissan	5.1	Suzuki	7.3		
Alfa Romeo	2.8	Honda	5.2	Lexus	7.6	Peugeot	5.6	Toyota	6.9		
Audi	6.8	Hyundai	4.8	Mazda	6.7	Renault	6.0	Vauxhall	3.3		
BMW	5.1	Jaguar	4.8	Mercedes	7.3	Seat	6.5	Volkswagen	6.2		
Citroen	4.2	Jeep	3.8	Mini	4.8	Skoda	5.8	Volvo	6.3		
Fiat	4.3	Kia	8.5	Mitsubishi	6.8	Subaru	5.4			AVERAGE	5.6

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q10a. How satisfied are you with the frequency of introduction of new models?

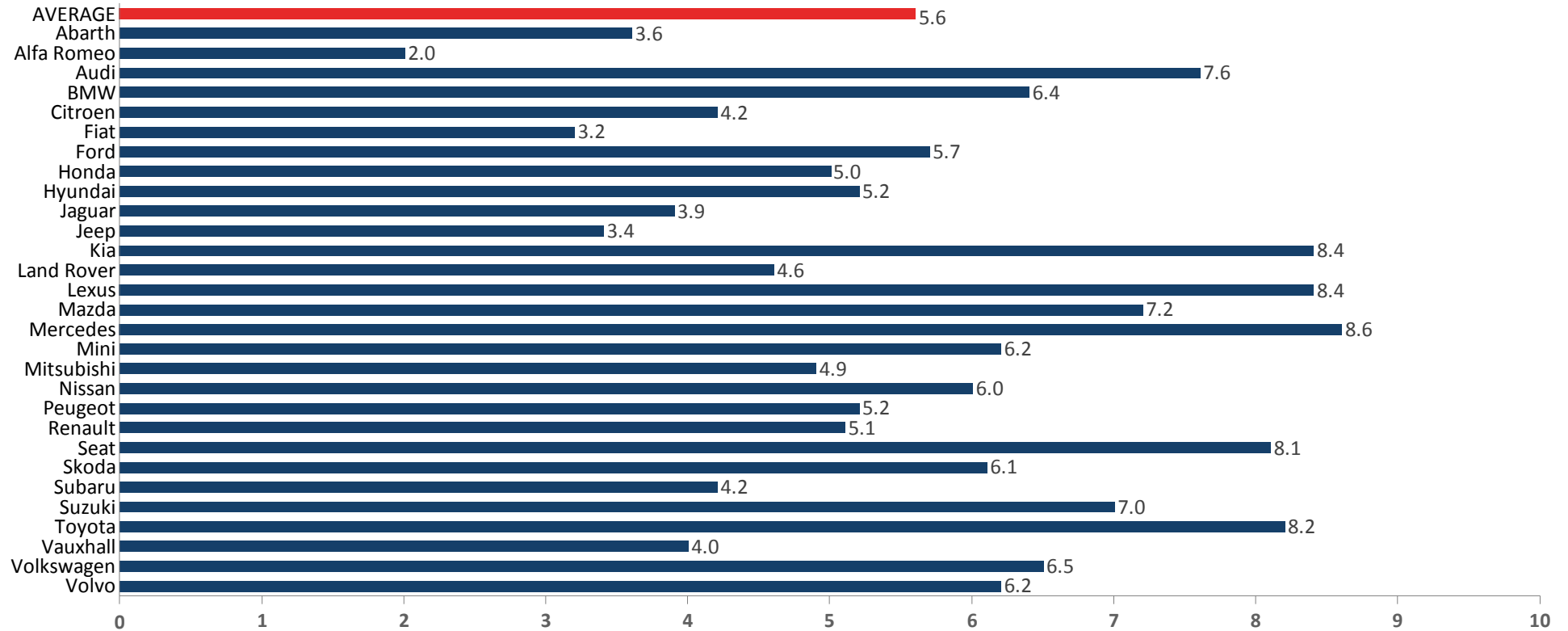


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.8	Ford	8.0	Land Rover	8.5	Nissan	5.7	Suzuki	8.1		
Alfa Romeo	3.8	Honda	3.8	Lexus	7.3	Peugeot	5.8	Toyota	6.0		
Audi	8.1	Hyundai	7.1	Mazda	8.3	Renault	7.7	Vauxhall	6.0		
BMW	7.8	Jaguar	8.2	Mercedes	9.4	Seat	7.9	Volkswagen	6.0		
Citroen	4.2	Jeep	4.2	Mini	7.6	Skoda	6.6	Volvo	8.1		
Fiat	4.6	Kia	9.4	Mitsubishi	3.0	Subaru	3.7			AVERAGE	6.5

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q10b. How satisfied are you with the product value and pricing?

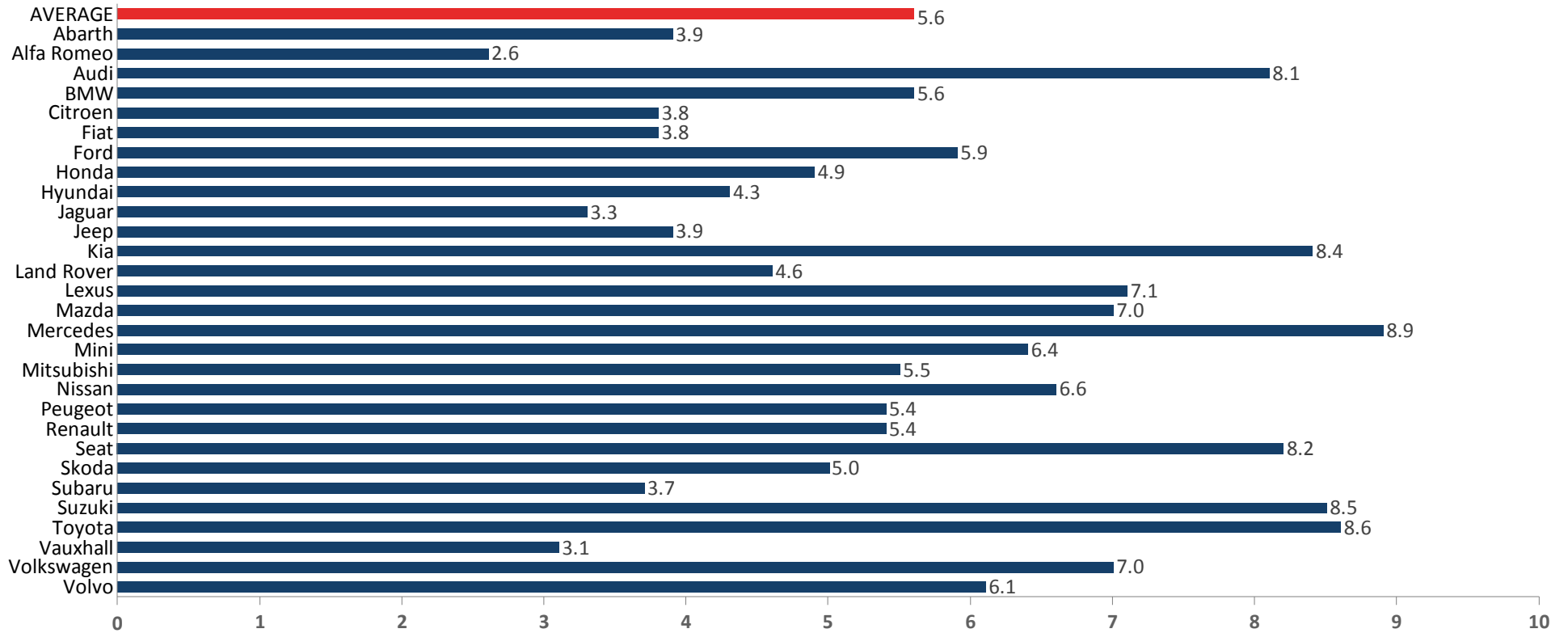


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.5	Ford	5.2	Land Rover	7.1	Nissan	5.6	Suzuki	8.1		
Alfa Romeo	3.9	Honda	5.1	Lexus	8.0	Peugeot	5.0	Toyota	6.6		
Audi	7.5	Hyundai	5.4	Mazda	7.6	Renault	6.6	Vauxhall	4.0		
BMW	7.0	Jaguar	6.7	Mercedes	8.5	Seat	7.3	Volkswagen	6.2		
Citroen	3.6	Jeep	3.5	Mini	6.5	Skoda	5.7	Volvo	6.4		
Fiat	4.5	Kia	8.6	Mitsubishi	4.3	Subaru	3.9			AVERAGE	5.8

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q10c. How satisfied are you with the product advertising?

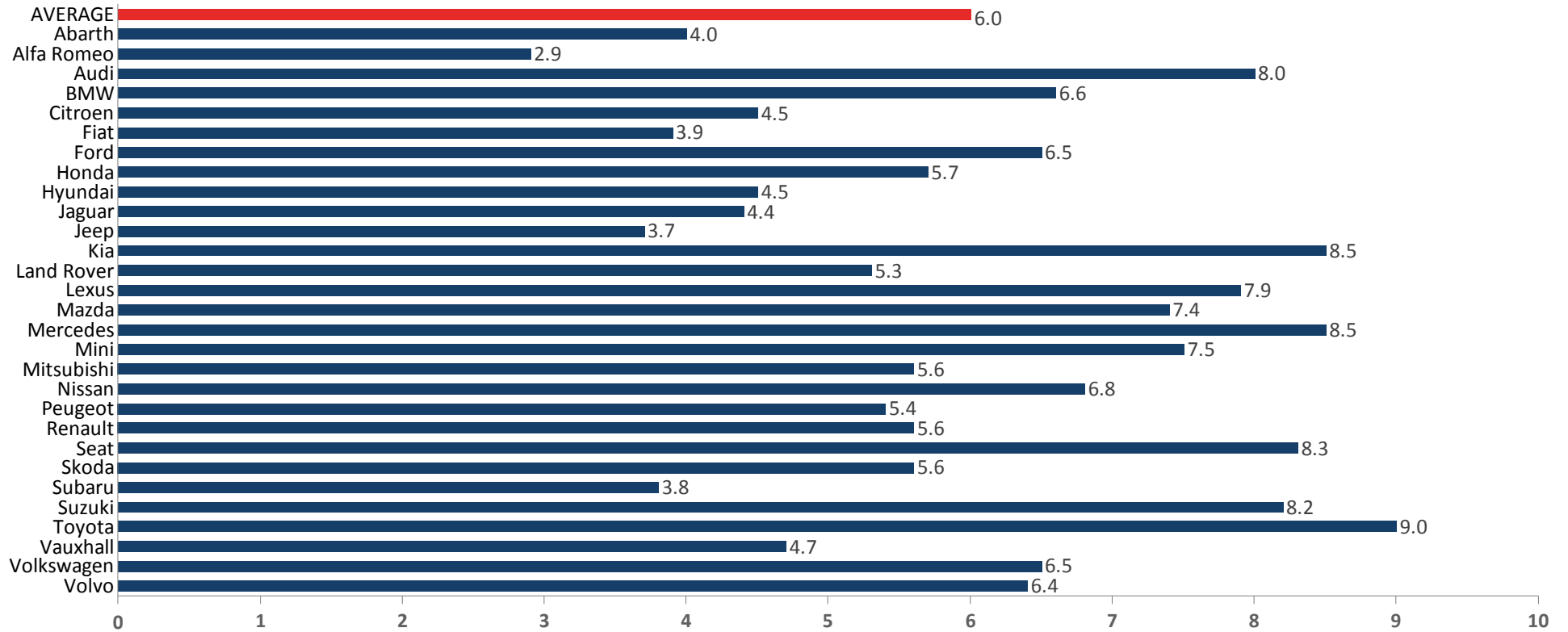


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.7	Ford	5.9	Land Rover	6.2	Nissan	5.8	Suzuki	8.2		
Alfa Romeo	5.2	Honda	5.1	Lexus	6.5	Peugeot	5.0	Toyota	6.7		
Audi	7.1	Hyundai	4.5	Mazda	6.9	Renault	5.7	Vauxhall	3.6		
BMW	4.9	Jaguar	6.5	Mercedes	9.1	Seat	6.9	Volkswagen	6.4		
Citroen	3.3	Jeep	4.5	Mini	5.5	Skoda	5.4	Volvo	5.7		
Fiat	5.8	Kia	8.6	Mitsubishi	5.2	Subaru	3.1			AVERAGE	5.7

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q10d. How satisfied are you with the consumer offers?

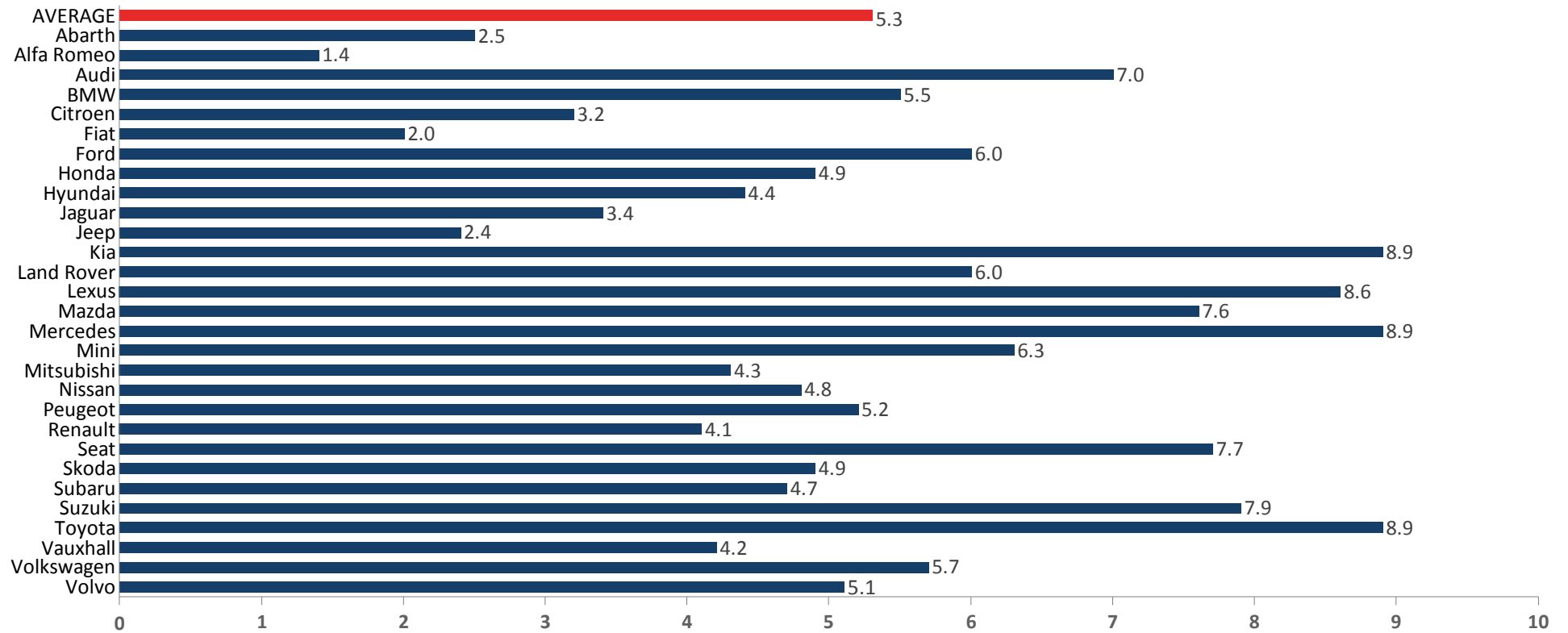


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	6.6	Ford	5.9	Land Rover	6.0	Nissan	5.6	Suzuki	7.9		
Alfa Romeo	3.9	Honda	5.6	Lexus	7.2	Peugeot	5.1	Toyota	7.1		
Audi	7.3	Hyundai	4.7	Mazda	7.7	Renault	6.4	Vauxhall	4.2		
BMW	7.0	Jaguar	5.7	Mercedes	8.7	Seat	7.4	Volkswagen	6.2		
Citroen	4.5	Jeep	3.7	Mini	6.9	Skoda	5.8	Volvo	6.2		
Fiat	5.1	Kia	8.4	Mitsubishi	5.3	Subaru	3.5			AVERAGE	5.9

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q11. How would you rate your manufacturer overall on a scale of 1 to 10?

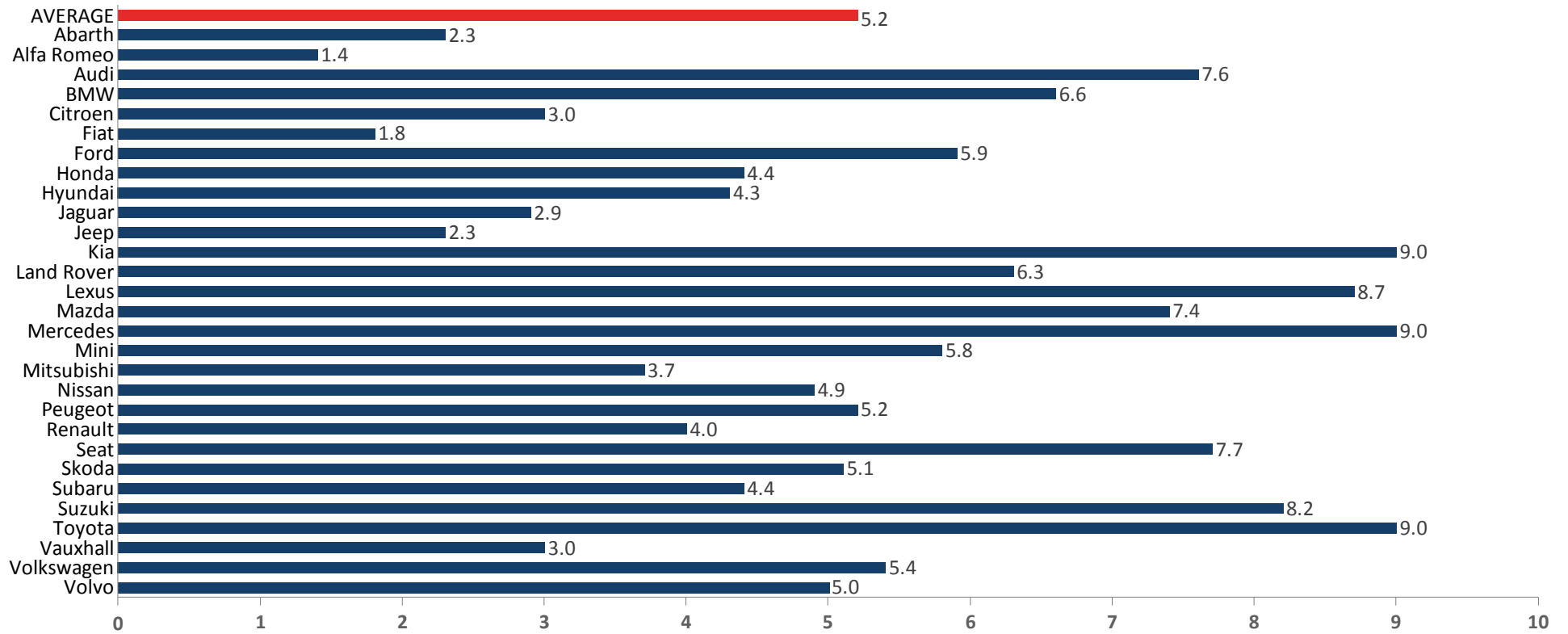


PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.9	Ford	6.1	Land Rover	6.2	Nissan	2.6	Suzuki	8.0		
Alfa Romeo	3.4	Honda	5.6	Lexus	8.4	Peugeot	5.0	Toyota	7.8		
Audi	6.8	Hyundai	5.0	Mazda	7.7	Renault	5.9	Vauxhall	4.2		
BMW	5.8	Jaguar	4.7	Mercedes	9.0	Seat	7.4	Volkswagen	5.3		
Citroen	2.8	Jeep	2.9	Mini	6.3	Skoda	5.7	Volvo	5.6		
Fiat	4.3	Kia	9.2	Mitsubishi	4.4	Subaru	4.2			AVERAGE	5.6

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q12. Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?



PREVIOUS SURVEY RESULTS – SUMMER 2017

Abarth	5.8	Ford	7.5	Land Rover	7.4	Nissan	3.2	Suzuki	8.5		
Alfa Romeo	3.9	Honda	5.8	Lexus	8.3	Peugeot	5.2	Toyota	7.7		
Audi	7.6	Hyundai	5.2	Mazda	8.0	Renault	6.5	Vauxhall	4.5		
BMW	7.4	Jaguar	5.6	Mercedes	9.3	Seat	7.6	Volkswagen	5.7		
Citroen	3.0	Jeep	2.9	Mini	7.5	Skoda	6.2	Volvo	6.6		
Fiat	4.8	Kia	9.5	Mitsubishi	4.4	Subaru	4.3			AVERAGE	6.1

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q4a: How satisfied/dissatisfied are you with: The current profit return from representing your franchise?

Mercedes	8.5	Suzuki	6.6	Volvo	4.6	Vauxhall	3.5	BMW	2.6		
Kia	8.4	Mazda	6.1	Honda	4.2	Mini	3.4	Fiat	2.1		
Toyota	8.4	Land Rover	5.9	Skoda	4.0	Mitsubishi	3.3	Jaguar	1.8		
Lexus	7.1	Ford	5.4	Subaru	3.8	Renault	3.0	Alfa Romeo	1.7		
Seat	7.1	Peugeot	4.8	Volkswagen	3.8	Abarth	2.9	Jeep	1.7		
Audi	7.0	Nissan	4.7	Hyundai	3.5	Citroen	2.7			Average	4.5

Q4b: How satisfied/dissatisfied are you with: The future profit return from representing your franchise?

Kia	8.6	Suzuki	6.6	Volkswagen	4.8	BMW	4.0	Citroen	2.9		
Toyota	8.5	Mazda	6.3	Volvo	4.6	Subaru	4.0	Abarth	2.6		
Lexus	8.1	Land Rover	6.0	Skoda	4.5	Renault	3.8	Fiat	2.0		
Mercedes	7.9	Ford	5.1	Honda	4.3	Hyundai	3.7	Jeep	2.0		
Seat	7.4	Nissan	5.0	Mini	4.2	Vauxhall	3.3	Alfa Romeo	1.8		
Audi	6.9	Peugeot	4.8	Mitsubishi	4.1	Jaguar	3.1			Average	4.8

Q4c: How satisfied/dissatisfied are you with: The required level of capital investment?

Kia	8.7	Mazda	6.9	Honda	5.2	Nissan	4.3	Fiat	3.4		
Toyota	8.5	Subaru	6.2	Volkswagen	4.9	Hyundai	4.1	Volvo	3.0		
Lexus	7.9	Ford	6.0	Peugeot	4.8	Vauxhall	3.6	Jeep	2.0		
Mercedes	7.9	Mitsubishi	5.7	Renault	4.4	Abarth	3.5	Alfa Romeo	1.9		
Suzuki	7.5	BMW	5.6	Skoda	4.4	Land Rover	3.5	Jaguar	1.9		
Seat	7.0	Audi	5.4	Mini	4.3	Citroen	3.4			Average	5.0

Q4d: How satisfied/dissatisfied are you with: The cost required in your dealership to meet franchised standards?

Kia	8.7	Mazda	6.7	Peugeot	4.7	Renault	4.0	Citroen	3.1		
Mercedes	8.4	Ford	5.8	Skoda	4.5	Abarth	3.9	Land Rover	3.1		
Toyota	8.0	Subaru	5.8	Volkswagen	4.5	Hyundai	3.7	Alfa Romeo	2.2		
Suzuki	7.7	Audi	5.6	Mini	4.2	Fiat	3.5	Jeep	2.1		
Lexus	7.5	Mitsubishi	5.5	Nissan	4.2	Vauxhall	3.4	Jaguar	1.9		
Seat	7.0	Honda	4.8	BMW	4.1	Volvo	3.4			Average	4.8

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q4e: How satisfied/dissatisfied are you with: The return on capital for your dealership?

Kia	8.6	Mazda	6.0	Land Rover	4.3	Volvo	3.7	Abarth	2.7		
Mercedes	8.1	Audi	5.8	Volkswagen	4.1	BMW	3.5	Jaguar	2.1		
Toyota	7.6	Ford	5.6	Mini	3.9	Mitsubishi	3.5	Fiat	1.8		
Lexus	7.4	Nissan	4.4	Skoda	3.9	Hyundai	3.4	Jeep	1.8		
Suzuki	6.9	Peugeot	4.4	Vauxhall	3.9	Citroen	2.9	Alfa Romeo	1.6		
Seat	6.8	Honda	4.3	Subaru	3.7	Renault	2.9			Average	4.5

Q5a: How satisfied/dissatisfied are you with: The volume target aspirations of your manufacturer are realistic?

Kia	8.4	Mazda	5.9	Peugeot	4.8	BMW	3.7	Jaguar	2.4		
Lexus	8.4	Subaru	5.5	Volkswagen	4.7	Nissan	3.7	Fiat	2.3		
Toyota	8.3	Land Rover	5.4	Audi	4.6	Citroen	3.4	Renault	2.2		
Mercedes	7.6	Skoda	5.4	Volvo	4.1	Abarth	3.0	Jeep	2.1		
Seat	7.5	Mini	5.2	Honda	3.9	Hyundai	3.0	Alfa Romeo	1.8		
Suzuki	6.9	Ford	5.0	Mitsubishi	3.9	Vauxhall	3.0			Average	4.5

Q5b: How satisfied/dissatisfied are you with: Your new car targeting process?

Lexus	8.6	Mazda	6.0	Ford	4.7	Nissan	3.6	Jaguar	2.5		
Kia	8.5	BMW	5.4	Land Rover	4.6	Volvo	3.6	Jeep	2.2		
Toyota	8.3	Subaru	5.4	Audi	4.5	Mitsubishi	3.4	Renault	2.2		
Mercedes	7.9	Mini	5.3	Volkswagen	4.3	Vauxhall	3.2	Fiat	2.1		
Seat	6.9	Peugeot	5.1	Honda	4.2	Hyundai	2.7	Alfa Romeo	1.9		
Suzuki	6.3	Skoda	4.9	Citroen	3.7	Abarth	2.6			Average	4.5

Q5c: How satisfied/dissatisfied are you with: Your total margin on new vehicles?

Lexus	8.9	Audi	6.4	Nissan	4.9	Renault	4.1	Abarth	3.2		
Kia	8.4	Suzuki	6.2	Land Rover	4.8	Subaru	4.1	Mitsubishi	3.0		
Toyota	8.2	Ford	6.0	Skoda	4.7	Volvo	4.0	Fiat	2.7		
Mercedes	7.8	BMW	5.3	Mini	4.4	Hyundai	3.8	Jeep	2.3		
Seat	6.9	Peugeot	5.2	Honda	4.3	Citroen	3.3	Alfa Romeo	1.9		
Mazda	6.5	Volkswagen	5.1	Jaguar	4.2	Vauxhall	3.3			Average	4.9

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q5d: How satisfied/dissatisfied are you with: Your current bonus and rebates rates on new car sales?

Kia	8.5	Audi	6.6	Volkswagen	5.0	Renault	4.3	Citroen	3.3		
Lexus	8.5	Mini	6.2	Land Rover	4.9	Subaru	4.3	Abarth	2.7		
Toyota	8.3	Mazda	6.0	Nissan	4.7	Volvo	3.9	Fiat	2.1		
Mercedes	8.1	BMW	5.8	Jaguar	4.5	Vauxhall	3.7	Jeep	2.1		
Seat	7.1	Ford	5.8	Skoda	4.4	Mitsubishi	3.5	Alfa Romeo	1.9		
Suzuki	6.9	Peugeot	5.0	Honda	4.3	Hyundai	3.4			Average	4.9

Q5e: How satisfied/dissatisfied are you with: Manufacturer inducement to self register vehicles?

Kia	9.0	Mazda	6.5	Mitsubishi	4.5	Hyundai	3.8	Fiat	3.3		
Lexus	8.5	Audi	6.0	Volvo	4.5	Mini	3.6	Vauxhall	3.2		
Toyota	8.1	Ford	5.6	Volkswagen	4.2	Skoda	3.5	Alfa Romeo	3.0		
Seat	7.8	Land Rover	5.6	Honda	4.1	Jaguar	3.4	Renault	2.9		
Mercedes	7.4	Subaru	5.5	Abarth	3.9	Jeep	3.4	BMW	2.6		
Suzuki	6.8	Peugeot	5.0	Citroen	3.8	Nissan	3.4			Average	4.8

Q5f: How satisfied/dissatisfied are you with: The fairness of your manufacturer's new car ordering and stocking policies?

Lexus	9.1	Suzuki	7.0	Volkswagen	5.9	Ford	5.3	Renault	3.9		
Toyota	8.9	Audi	6.9	Honda	5.7	Hyundai	5.2	Abarth	2.8		
Kia	8.8	Land Rover	6.7	Skoda	5.6	Vauxhall	5.1	Jeep	2.7		
Mercedes	8.1	Mini	6.5	Peugeot	5.5	Volvo	4.7	Fiat	2.5		
BMW	7.3	Seat	6.5	Jaguar	5.4	Nissan	4.1	Alfa Romeo	2.0		
Mazda	7.1	Subaru	6.1	Mitsubishi	5.4	Citroen	4.0			Average	5.5

Q5g: How satisfied/dissatisfied are you with: The fairness of your manufacturer's demonstrator programme?

Mercedes	8.1	Seat	7.2	Peugeot	5.2	Land Rover	4.3	Fiat	3.6		
Kia	8.0	Mazda	6.8	Ford	5.1	Volvo	4.3	Vauxhall	3.5		
Toyota	7.8	Mini	5.7	Mitsubishi	5.1	Hyundai	4.0	Jeep	2.4		
Suzuki	7.5	Volkswagen	5.5	Skoda	4.8	Renault	4.0	Jaguar	2.3		
Audi	7.3	BMW	5.3	Honda	4.6	Citroen	3.9	Alfa Romeo	2.0		
Lexus	7.2	Subaru	5.3	Nissan	4.6	Abarth	3.7			Average	5.0

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q6a: How satisfied/dissatisfied are you with: The competitiveness of your manufacturer's finance programme?

Toyota	9.3	Seat	7.5	Volkswagen	6.7	Vauxhall	5.6	Fiat	4.9		
Mercedes	8.5	Mazda	7.4	Land Rover	6.6	Renault	5.4	Jeep	4.7		
Kia	8.4	Mini	7.3	Honda	6.5	Abarth	5.3	Alfa Romeo	4.5		
Lexus	8.4	Suzuki	7.3	Volvo	6.3	Citroen	5.2	Jaguar	4.5		
Audi	8.2	Ford	7.0	Peugeot	6.1	Mitsubishi	5.2	Subaru	4.1		
BMW	8.0	Nissan	6.7	Skoda	5.9	Hyundai	5.0			Average	6.4

Q6b: How satisfied/dissatisfied are you with: The reasonableness of the finance penetration and renewal targets set by your manufacturer

Toyota	9.1	Mini	7.8	Volkswagen	6.9	Volvo	6.0	Citroen	5.4		
Lexus	8.8	Suzuki	7.7	Vauxhall	6.6	Abarth	5.8	Jeep	5.4		
Mercedes	8.7	Seat	7.6	Skoda	6.3	Ford	5.8	Fiat	5.3		
BMW	8.3	Mazda	7.2	Nissan	6.2	Mitsubishi	5.7	Renault	5.1		
Kia	8.3	Honda	6.9	Peugeot	6.2	Subaru	5.7	Alfa Romeo	4.5		
Audi	8.1	Land Rover	6.9	Jaguar	6.1	Hyundai	5.5			Average	6.5

Q6c: How satisfied/dissatisfied are you with: The earnings potential of your manufacturer's finance programme?

Mercedes	8.4	Land Rover	6.6	Peugeot	5.8	Fiat	4.7	Ford	4.2		
Mini	7.8	Lexus	6.6	Volkswagen	5.8	Hyundai	4.6	Abarth	4.1		
Audi	7.5	Honda	6.2	Citroen	5.7	Jeep	4.6	Alfa Romeo	4.1		
Kia	7.5	Jaguar	6.1	Mazda	5.7	Skoda	4.6	Subaru	4.1		
BMW	7.2	Seat	6.1	Suzuki	5.6	Volvo	4.5	Renault	3.9		
Toyota	7.2	Nissan	6.0	Vauxhall	4.9	Mitsubishi	4.3			Average	5.5

Q7a: How satisfied/dissatisfied are you with: Your manufacturer's used car standards?

Lexus	8.9	Audi	7.7	Nissan	7.0	Citroen	6.4	Jaguar	4.1		
Kia	8.8	Suzuki	7.4	Honda	6.8	Mitsubishi	6.0	Fiat	4.0		
Mercedes	8.8	Subaru	7.3	Vauxhall	6.8	Skoda	6.0	Jeep	4.0		
Toyota	8.1	Mazda	7.2	Volkswagen	6.8	Renault	5.3	Abarth	3.7		
Mini	7.9	Seat	7.2	Peugeot	6.6	Hyundai	5.0	Alfa Romeo	3.3		
BMW	7.8	Ford	7.0	Volvo	6.6	Land Rover	4.6			Average	6.5

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q7b: How satisfied/dissatisfied are you with: The targets set by your manufacturer for used cars? (If applicable)

Toyota	9.3	Suzuki	7.4	Seat	6.6	Vauxhall	6.0	Hyundai	4.2		
Lexus	9.2	Subaru	7.2	Audi	6.5	Mitsubishi	5.9	Jeep	4.0		
Kia	8.9	Nissan	7.1	Citroen	6.4	Skoda	5.6	Volvo	4.0		
Mini	8.1	Mazda	6.9	Honda	6.4	Abarth	5.3	Fiat	3.6		
BMW	7.8	Renault	6.8	Peugeot	6.1	Land Rover	5.1	Jaguar	3.6		
Mercedes	7.4	Ford	6.6	Volkswagen	6.1	Alfa Romeo	4.7			Average	6.2

Q7c: How satisfied/dissatisfied are you with: The cost and quality of your manufacturer's used car warranties?

Kia	9.0	Mazda	6.7	Peugeot	6.2	Hyundai	5.2	Jaguar	4.2		
Mercedes	8.3	Audi	6.6	Vauxhall	6.2	Skoda	5.0	Fiat	3.9		
Mini	8.3	Honda	6.6	Citroen	5.8	Volvo	4.9	Abarth	3.5		
Lexus	8.1	Seat	6.6	Volkswagen	5.7	Renault	4.8	Jeep	3.5		
BMW	7.8	Nissan	6.5	Ford	5.4	Mitsubishi	4.5	Alfa Romeo	2.9		
Toyota	7.3	Suzuki	6.5	Subaru	5.3	Land Rover	4.4			Average	5.9

Q7d: How satisfied/dissatisfied are you with: Your total margin on used car sales?

Kia	8.4	Nissan	6.8	Honda	6.5	Renault	5.9	Land Rover	5.0		
Toyota	8.3	Suzuki	6.8	Subaru	6.4	Volkswagen	5.9	Fiat	4.3		
Lexus	8.2	Audi	6.7	Peugeot	6.3	BMW	5.8	Jaguar	4.0		
Mazda	7.2	Mitsubishi	6.7	Seat	6.1	Hyundai	5.6	Jeep	3.8		
Mercedes	7.2	Ford	6.6	Volvo	6.0	Abarth	5.3	Alfa Romeo	3.3		
Mini	7.1	Vauxhall	6.6	Citroen	5.9	Skoda	5.3			Average	6.2

Q7e: How satisfied/dissatisfied are you with: Your manufacturer's used car programme?

Kia	8.5	Toyota	7.1	Citroen	6.4	Seat	5.6	Hyundai	4.3		
Mercedes	7.9	Mazda	6.9	Peugeot	6.3	Mitsubishi	5.4	Jeep	3.6		
BMW	7.6	Lexus	6.8	Honda	5.8	Skoda	5.3	Fiat	3.3		
Mini	7.5	Vauxhall	6.7	Subaru	5.8	Land Rover	5.2	Abarth	3.2		
Audi	7.3	Volkswagen	6.5	Suzuki	5.8	Jaguar	4.7	Alfa Romeo	2.7		
Nissan	7.1	Volvo	6.5	Ford	5.7	Renault	4.4			Average	6.0

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q7f: How satisfied/dissatisfied are you with: Your manufacturer's requirements to buy ex-manufacturer vehicles?

Kia	8.6	Subaru	6.9	BMW	6.2	Mitsubishi	5.4	Volkswagen	4.9		
Lexus	8.5	Suzuki	6.7	Mercedes	6.1	Alfa Romeo	5.3	Volvo	4.5		
Toyota	8.2	Nissan	6.6	Vauxhall	6.1	Hyundai	5.3	Jeep	4.2		
Ford	7.3	Renault	6.4	Audi	6.0	Skoda	5.3	Land Rover	4.1		
Mazda	7.2	Citroen	6.3	Honda	6.0	Fiat	5.0	Jaguar	3.1		
Mini	7.1	Peugeot	6.3	Seat	5.8	Abarth	4.9			Average	6.1

Q8a: How satisfied/dissatisfied are you with: Your manufacturer's target setting for aftersales?

Lexus	8.5	BMW	6.3	Volkswagen	5.7	Hyundai	4.9	Jeep	3.5		
Kia	8.3	Seat	6.3	Mitsubishi	5.4	Land Rover	4.8	Fiat	3.3		
Toyota	8.2	Subaru	6.0	Audi	5.3	Renault	4.6	Abarth	3.1		
Mercedes	7.6	Mini	5.9	Citroen	5.3	Vauxhall	4.6	Jaguar	3.1		
Suzuki	7.3	Peugeot	5.9	Nissan	5.2	Volvo	4.2	Alfa Romeo	1.9		
Mazda	6.9	Honda	5.8	Ford	5.0	Skoda	4.0			Average	5.4

Q8b: How satisfied/dissatisfied are you with: Quality of technical support?

Kia	8.5	Suzuki	7.3	Volkswagen	6.7	Honda	5.6	Fiat	4.6		
Toyota	8.5	Seat	7.1	Skoda	6.4	Hyundai	5.6	Jeep	4.5		
Lexus	8.4	Volvo	7.0	Mitsubishi	6.3	Citroen	5.4	Jaguar	4.1		
Mercedes	8.3	Mazda	6.9	Nissan	6.0	Abarth	5.3	Alfa Romeo	3.9		
BMW	8.1	Subaru	6.9	Peugeot	6.0	Vauxhall	4.9	Land Rover	3.8		
Mini	7.8	Audi	6.7	Ford	5.9	Renault	4.8			Average	6.1

Q8c: How satisfied/dissatisfied are you with: Availability of parts?

Lexus	9.3	Suzuki	7.7	Honda	7.0	Nissan	6.3	Citroen	5.3		
Kia	8.7	Seat	7.4	Skoda	6.9	Peugeot	6.2	Abarth	4.0		
Toyota	8.6	Mitsubishi	7.3	Subaru	6.9	Vauxhall	5.8	Fiat	3.5		
Mercedes	8.2	BMW	7.2	Audi	6.8	Hyundai	5.7	Jeep	3.1		
Mini	8.1	Ford	7.1	Mazda	6.6	Land Rover	5.7	Alfa Romeo	2.4		
Volvo	8.0	Volkswagen	7.1	Jaguar	6.3	Renault	5.4			Average	6.5

NFDA DEALER ATTITUDE SURVEY - RESULTS OF THE WINTER 2017/2018 SURVEY

Q8d: How satisfied/dissatisfied are you with: Price of manufacturer's parts compared with parts factors?

Lexus	8.4	Mini	6.2	Volkswagen	5.5	Mitsubishi	5.0	Renault	3.9		
Kia	8.3	Skoda	6.0	Subaru	5.3	Citroen	4.7	Abarth	3.3		
Mercedes	7.9	Mazda	5.9	Peugeot	5.2	Land Rover	4.7	Jeep	3.0		
Toyota	7.2	Honda	5.7	Audi	5.1	Hyundai	4.6	Fiat	2.6		
Subaru	6.6	Volvo	5.6	BMW	5.0	Vauxhall	4.4	Alfa Romeo	2.5		
Seat	6.4	Nissan	5.5	Ford	5.0	Jaguar	4.3			Average	5.2

Q8e: How satisfied/dissatisfied are you with: Service retained earnings?

Lexus	8.6	Volvo	6.6	Seat	6.2	Skoda	5.5	Jaguar	4.1		
Mercedes	8.4	Audi	6.5	Subaru	6.2	Citroen	5.1	Fiat	3.2		
Kia	8.3	Suzuki	6.5	BMW	6.1	Renault	5.1	Abarth	3.0		
Toyota	7.9	Mitsubishi	6.4	Nissan	6.0	Hyundai	5.0	Jeep	2.9		
Mini	7.1	Honda	6.3	Peugeot	6.0	Vauxhall	5.0	Alfa Romeo	2.2		
Mazda	6.7	Ford	6.2	Volkswagen	6.0	Land Rover	4.3			Average	5.8

Q8f: How satisfied/dissatisfied are you with: Manufacturer service plan rates and recovery?

Lexus	8.6	Mazda	6.5	Seat	6.1	Volkswagen	5.1	Abarth	3.7		
Mercedes	8.6	Volvo	6.4	Peugeot	5.8	Citroen	5.0	Fiat	3.5		
Kia	8.2	Honda	6.3	Subaru	5.8	Renault	4.4	Jeep	3.2		
Toyota	7.9	Mitsubishi	6.3	Audi	5.5	Vauxhall	4.4	Jaguar	3.0		
Mini	6.9	Nissan	6.2	Ford	5.4	Hyundai	4.3	Alfa Romeo	2.9		
BMW	6.6	Suzuki	6.2	Skoda	5.2	Land Rover	3.8			Average	5.5

Q8g: How satisfied/dissatisfied are you with: The fairness of your manufacturer's warranty policy for you and your customers?

Lexus	9.1	Mini	7.7	Honda	6.8	Vauxhall	6.0	Land Rover	4.6		
Toyota	8.9	Audi	7.3	Nissan	6.3	Mitsubishi	5.8	Jeep	4.0		
Kia	8.5	Seat	7.0	Volkswagen	6.2	Citroen	5.7	Fiat	3.8		
Mercedes	8.5	Subaru	7.0	Jaguar	6.1	Hyundai	5.6	Abarth	3.3		
Suzuki	8.0	Volvo	7.0	Peugeot	6.1	Renault	5.3	Alfa Romeo	3.0		
BMW	7.9	Mazda	6.9	Ford	6.0	Skoda	5.1			Average	6.3

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Q8h: How satisfied are you with your manufacturer's policy for stocking for parts/accessories?

Lexus	9.1	Mitsubishi	7.2	Subaru	6.6	Renault	5.6	Citroen	4.7		
Toyota	9.0	BMW	6.9	Volkswagen	6.6	Land Rover	5.5	Abarth	2.9		
Kia	8.5	Mazda	6.8	Seat	6.1	Nissan	5.4	Jeep	2.6		
Mercedes	8.2	Volvo	6.8	Skoda	5.9	Hyundai	5.3	Alfa Romeo	2.5		
Suzuki	7.5	Audi	6.7	Ford	5.8	Jaguar	5.1	Fiat	2.3		
Mini	7.2	Honda	6.6	Peugeot	5.6	Vauxhall	4.8			Average	5.9

Q9a: How satisfied/dissatisfied are you with: Your ability to do business with your manufacturer on a day-to-day basis?

Lexus	9.4	Seat	7.8	Subaru	5.9	Volvo	5.4	Jeep	4.2		
Mercedes	9.3	Mini	7.3	Volkswagen	5.7	Hyundai	5.2	Citroen	4.0		
Toyota	9.3	BMW	7.1	Renault	5.6	Nissan	5.2	Abarth	3.6		
Kia	9.1	Audi	6.4	Skoda	5.6	Honda	5.1	Fiat	3.6		
Suzuki	8.3	Ford	5.9	Peugeot	5.5	Jaguar	4.8	Alfa Romeo	2.7		
Mazda	8.0	Land Rover	5.9	Mitsubishi	5.4	Vauxhall	4.7			Average	5.9

Q9b: How satisfied/dissatisfied are you with: The management of your manufacturer actually takes dealers' views and opinions into account?

Lexus	9.4	Seat	7.3	Ford	5.6	Jaguar	4.5	Citroen	3.3		
Toyota	9.2	Mitsubishi	6.2	Volkswagen	5.6	Hyundai	4.4	Jeep	3.2		
Kia	9.1	BMW	6.1	Peugeot	5.1	Mitsubishi	4.2	Abarth	2.4		
Mercedes	8.9	Audi	6.0	Skoda	5.0	Renault	4.2	Fiat	2.2		
Suzuki	7.9	Land Rover	5.8	Honda	4.7	Vauxhall	3.8	Alfa Romeo	1.9		
Mazda	7.5	Subaru	5.8	Nissan	4.7	Volvo	3.8			Average	5.3

Q9c: How satisfied/dissatisfied are you with: Your manufacturer's dealer council/franchise board? (If applicable)

Lexus	9.0	Land Rover	6.2	Volkswagen	5.7	Citroen	4.7	Alfa Romeo	3.2		
Toyota	9.0	Nissan	6.0	Skoda	5.5	Renault	4.6	Fiat	3.1		
Kia	8.8	Audi	5.8	Jaguar	5.4	Mitsubishi	4.5	Abarth	2.2		
Mercedes	8.8	BMW	5.8	Peugeot	5.4	Vauxhall	4.5				
Seat	7.3	Honda	5.7	Ford	5.2	Volvo	3.7				
Mazda	7.1	Mini	5.7	Hyundai	4.9	Jeep	3.4			Average	5.5

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Q9d: How satisfied/dissatisfied are you with: Your manufacturer's response to your communications with them?

Lexus	9.1	Seat	7.4	Subaru	5.7	Volvo	5.1	Jeep	3.9		
Kia	9.0	BMW	7.0	Volkswagen	5.7	Nissan	5.0	Citroen	3.8		
Toyota	9.0	Mini	6.5	Land Rover	5.6	Renault	5.0	Fiat	3.3		
Mercedes	8.9	Ford	6.0	Peugeot	5.5	Mitsubishi	4.9	Abarth	2.6		
Suzuki	7.6	Audi	5.9	Skoda	5.5	Hyundai	4.8	Alfa Romeo	2.1		
Mazda	7.5	Honda	5.8	Vuaxhall	5.5	Jaguar	4.3			Average	5.7

Q9e: How satisfied/dissatisfied are you with: That your manufacturer dealer standards are fair and reasonable?

Mercedes	9.1	Seat	7.6	Mitsubishi	5.7	Land Rover	5.1	Abarth	4.0		
Kia	9.0	Mini	7.3	Volkswagen	5.7	Skoda	4.8	Jaguar	4.0		
Lexus	8.6	Subaru	7.3	Honda	5.3	Hyundai	4.7	Fiat	3.9		
Toyota	8.6	BMW	6.7	Nissan	5.3	Vauxhall	4.7	Jeep	3.4		
Suzuki	8.0	Ford	6.3	Volvo	5.3	Citroen	4.3	Alfa Romeo	2.3		
Mazda	7.6	Audi	5.9	Peugeot	5.2	Renault	4.1			Average	5.7

Q9f: How satisfied/dissatisfied are you with: The performance measures used by your manufacturer on your business are fair and reasonable?

Kia	8.9	Seat	7.4	Volkswagen	5.7	Honda	5.0	Fiat	4.0		
Lexus	8.8	BMW	7.2	Nissan	5.4	Land Rover	5.0	Citroen	3.9		
Mercedes	8.7	Mini	7.2	Mitsubishi	5.3	Hyundai	4.9	Jeep	3.6		
Toyota	8.4	Subaru	6.7	Peugeot	5.3	Jaguar	4.8	Abarth	3.2		
Suzuki	7.8	Audi	6.0	Volvo	5.2	Vauxhall	4.8	Alfa Romeo	2.6		
Mazda	7.6	Ford	5.7	Skoda	5.1	Renault	4.4			Average	5.7

Q9g: How satisfied/dissatisfied are you with: The penalties and escalation process for weak performance used by your manufacturer are fair and reasonable?

Lexus	8.9	Audi	7.0	Volkswagen	5.5	Volvo	5.1	Jaguar	4.4		
Mercedes	8.8	Mazda	7.0	Nissan	5.4	Skoda	5.0	Citroen	4.0		
Toyota	8.8	Subaru	6.8	Honda	5.3	Land Rover	4.7	Jeep	3.9		
Kia	8.7	Mini	6.5	Hyundai	5.2	Mitsubishi	4.7	Abarth	3.3		
Suzuki	7.9	BMW	6.3	Renault	5.2	Vauxhall	4.6	Alfa Romeo	2.7		
Seat	7.4	Peugeot	5.5	Ford	5.1	Fiat	4.4			Average	5.6

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Q9h: How satisfied/dissatisfied are you with: The incentives and penalty regime that underpins your manufacturer's CSI programme?

Mercedes	8.8	Seat	7.2	Land Rover	5.4	Ford	5.0	Jeep	3.7		
Kia	8.7	Subaru	6.9	Mitsubishi	5.3	Vauxhall	5.0	Citroen	3.5		
Toyota	8.7	Mazda	6.8	Hyundai	5.2	Nissan	4.9	Renault	3.3		
Lexus	8.6	Audi	6.6	Jaguar	5.2	Volkswagen	4.8	Abarth	3.0		
Suzuki	7.4	BMW	6.1	Skoda	5.2	Peugeot	4.5	Alfa Romeo	2.7		
Mini	7.3	Honda	5.8	Volvo	5.2	Fiat	3.9			Average	5.4

Q9i: How satisfied/dissatisfied are you with: Your manufacturer's procedures and controls on your business are fair and reasonable?

Lexus	9.1	Seat	7.4	Volkswagen	5.6	Nissan	4.9	Fiat	4.0		
Kia	8.8	Mini	7.1	Honda	5.5	Volvo	4.9	Jaguar	3.9		
Mercedes	8.8	Subaru	6.9	Mitsubishi	5.3	Vauxhall	4.6	Jeep	3.7		
Toyota	8.5	BMW	6.8	Hyundai	5.1	Land Rover	4.3	Abarth	3.0		
Suzuki	8.1	Audi	6.5	Peugeot	5.1	Renault	4.3	Alfa Romeo	2.7		
Mazda	7.4	Ford	6.0	Skoda	5.1	Citroen	4.2			Average	5.6

Q9j: How satisfied/dissatisfied are you with: The value of manufacturer field staff to your business?

Kia	9.0	Seat	7.3	Skoda	5.8	Audi	5.2	Vauxhall	4.4		
Toyota	8.9	Mini	6.9	Volvo	5.7	Jeep	5.0	Fiat	4.1		
Mercedes	8.6	BMW	6.8	Hyundai	5.6	Renault	5.0	Jaguar	3.9		
Lexus	8.3	Mitsubishi	6.1	Peugeot	5.6	Land Rover	4.8	Abarth	3.8		
Mazda	7.8	Nissan	6.0	Subaru	5.6	Citroen	4.6	Alfa Romeo	3.6		
Suzuki	7.6	Volkswagen	5.9	Ford	5.3	Honda	4.5			Average	5.8

Q9k: How satisfied/dissatisfied are you with: The quality of your manufacturer's training?

Kia	8.9	Seat	7.8	Volkswagen	6.8	Renault	6.2	Jeep	4.9		
Toyota	8.9	Suzuki	7.5	Mazda	6.6	Citroen	5.7	Alfa Romeo	4.5		
Mercedes	8.6	Volvo	7.5	Mitsubishi	6.6	Jaguar	5.7	Fiat	4.5		
BMW	8.2	Audi	7.1	Subaru	6.4	Peugeot	5.6	Hyundai	4.4		
Mini	8.0	Skoda	7.0	Ford	6.3	Vauxhall	5.6	Abarth	4.3		
Lexus	7.9	Land Rover	6.8	Nissan	6.2	Honda	5.1			Average	6.4

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Q9l: How satisfied/dissatisfied are you with: The cost of your manufacturer's training?

Kia	8.5	Seat	6.8	Volvo	5.8	BMW	4.7	Renault	3.7		
Lexus	7.9	Mazda	6.1	Audi	5.5	Citroen	4.7	Jeep	3.6		
Mercedes	7.9	Mini	5.9	Nissan	5.3	Jaguar	4.7	Abarth	3.5		
Suzuki	7.4	Volkswagen	5.9	Land Rover	5.1	Honda	4.4	Vauxhall	3.2		
Toyota	7.4	Skoda	5.8	Peugeot	5.1	Fiat	3.8	Alfa Romeo	3.0		
Mitsubishi	7.3	Subaru	5.8	Ford	4.8	Hyundai	3.7			Average	5.2

Q9m: How satisfied/dissatisfied are you with: Your manufacturer's apprenticeship programme?

Kia	8.9	Suzuki	7.7	Skoda	6.6	Honda	5.8	Hyundai	4.5		
Mercedes	8.5	Volvo	7.7	Volkswagen	6.6	Nissan	5.7	Fiat	3.9		
Lexus	8.4	Seat	7.4	Mitsubishi	6.5	Renault	5.5	Jeep	3.6		
Toyota	8.3	Audi	7.3	Mazda	6.4	Citroen	5.2	Abarth	3.0		
BMW	7.8	Land Rover	7.1	Ford	6.0	Subaru	5.2	Alfa Romeo	3.0		
Mini	7.8	Jaguar	6.7	Peugeot	6.0	Vauxhall	4.7			Average	6.2

Q9n: How satisfied/dissatisfied are you with: Your manufacturer's approach to the General Data Protection Regulations ?

Lexus	8.7	Seat	7.2	Volvo	6.2	Subaru	5.6	Citroen	4.4		
Kia	8.4	Vauxhall	7.1	Renault	6.0	Skoda	5.5	Jeep	3.2		
Toyota	8.3	Mazda	6.8	Jaguar	5.7	Honda	5.3	Abarth	2.8		
Mercedes	8.1	BMW	6.6	Land Rover	5.7	Mitsubishi	5.3	Fiat	2.6		
Suzuki	7.8	Audi	6.4	Peugeot	5.7	Ford	5.2	Alfa Romeo	2.5		
Mini	7.2	Volkswagen	6.3	Nissan	5.6	Hyundai	4.7			Average	5.9

10a: How satisfied/dissatisfied are you with: Frequency of introduction of new models?

Audi	9.3	Lexus	7.6	Volkswagen	7.3	Skoda	6.4	Mitsubishi	3.6		
Kia	9.0	Toyota	7.6	Mini	7.1	Peugeot	5.9	Honda	3.3		
Mercedes	8.7	BMW	7.5	Ford	7.0	Vauxhall	5.2	Abarth	2.6		
Seat	8.3	Land Rover	7.5	Hyundai	6.8	Citroen	5.1	Alfa Romeo	2.6		
Volvo	7.8	Mazda	7.4	Nissan	6.7	Subaru	5.1	Fiat	2.1		
Jaguar	7.7	Suzuki	7.3	Renault	6.6	Jeep	3.7			Average	6.3

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Q10b: How satisfied/dissatisfied are you with: Product value and pricing?

Mercedes	8.6	Mazda	7.2	Skoda	6.1	Honda	5.0	Jaguar	3.9		
Kia	8.4	Suzuki	7.0	Nissan	6.0	Mitsubishi	4.9	Abarth	3.6		
Lexus	8.4	Volkswagen	6.5	Ford	5.7	Land Rover	4.6	Jeep	3.4		
Toyota	8.2	BMW	6.4	Hyundai	5.2	Citroen	4.2	Fiat	3.2		
Seat	8.1	Mini	6.2	Peugeot	5.2	Subaru	4.2	Alfa Romeo	2.0		
Audi	7.6	Volvo	6.2	Renault	5.1	Vauxhall	4.0			Average	5.6

Q10c: How satisfied/dissatisfied are you with: Product advertising?

Mercedes	8.9	Lexus	7.1	Ford	5.9	Honda	4.9	Fiat	3.8		
Toyota	8.6	Mazda	7.0	BMW	5.6	Land Rover	4.6	Subaru	3.7		
Suzuki	8.5	Volkswagen	7.0	Mitsubishi	5.5	Hyundai	4.3	Jaguar	3.3		
Kia	8.4	Nissan	6.6	Peugeot	5.4	Abarth	3.9	Vauxhall	3.1		
Seat	8.2	Mini	6.4	Renault	5.4	Jeep	3.9	Alfa Romeo	2.6		
Audi	8.1	Volvo	6.1	Skoda	5.0	Citroen	3.8			Average	5.6

Q10d: How satisfied/dissatisfied are you with: Strength of consumer offers?

Toyota	9.0	Lexus	7.9	Volkswagen	6.5	Peugeot	5.4	Abarth	4.0		
Kia	8.5	Mini	7.5	Volvo	6.4	Land Rover	5.3	Fiat	3.9		
Mercedes	8.5	Mazda	7.4	Honda	5.7	Vauxhall	4.7	Subaru	3.8		
Seat	8.3	Nissan	6.8	Mitsubishi	5.6	Citroen	4.5	Jeep	3.7		
Suzuki	8.2	BMW	6.6	Renault	5.6	Hyundai	4.5	Alfa Romeo	2.9		
Audi	8.0	Ford	6.5	Skoda	5.6	Jaguar	4.4			Average	6.0

Q10e: How satisfied/dissatisfied are you with: Digital marketing proposition?

Toyota	8.8	Audi	7.3	Ford	6.0	Honda	5.5	Jeep	4.1		
Kia	8.4	Mazda	7.3	Land Rover	5.8	Skoda	5.5	Abarth	4.0		
Mercedes	8.4	Mini	7.2	Peugeot	5.8	Renault	4.9	Fiat	4.0		
Lexus	7.9	Volkswagen	6.8	Volvo	5.8	Vauxhall	4.7	Subaru	3.8		
Seat	7.7	BMW	6.7	Jaguar	5.6	Citroen	4.6	Alfa Romeo	2.8		
Suzuki	7.7	Nissan	6.6	Mitsubishi	5.6	Hyundai	4.6			Average	6.0

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Q10f : How satisfied/dissatisfied are you with: Alternative fuel vehicle offering?

Toyota	9.6	Mitsubishi	7.1	Land Rover	5.7	Mazda	3.6	Vauxhall	1.9		
Lexus	9.2	Mercedes	7.0	Renault	5.3	Suzuki	3.3	Jeep	1.3		
Kia	8.4	Volvo	6.8	Jaguar	4.8	Citroen	2.8	Fiat	1.2		
Nissan	7.6	Audi	6.6	Ford	3.7	Honda	2.8	Abarth	1.1		
Mini	7.3	Hyundai	6.5	Peugeot	3.7	Skoda	2.8	Alfa Romeo	1.0		
BMW	7.2	Volkswagen	6.1	Seat	3.7	Subaru	2.3			Average	4.7

Q10g: How satisfied/dissatisfied are you with: Your manufacturer's approach to future retailing channels?

Kia	8.6	Audi	6.9	Nissan	5.7	Jaguar	4.8	Vauxhall	3.8		
Toyota	8.5	Mazda	6.4	Mitsubishi	5.5	Ford	4.7	Abarth	3.0		
Mercedes	8.3	Seat	6.4	Peugeot	5.5	Subaru	4.7	Jeep	2.9		
Lexus	7.8	Suzuki	6.4	Volvo	5.3	Skoda	4.6	Fiat	2.3		
BMW	7.2	Volkswagen	6.3	Hyundai	4.9	Citroen	4.4	Alfa Romeo	2.2		
Mini	7.2	Land Rover	5.9	Renault	4.9	Honda	4.3			Average	5.4

Q11: Considering all your answers, how would you rate your manufacturer overall?

Kia	8.9	Mazda	7.6	BMW	5.5	Subaru	4.7	Citroen	3.2		
Mercedes	8.9	Audi	7.0	Peugeot	5.2	Hyundai	4.4	Abarth	2.5		
Toyota	8.9	Mini	6.3	Volvo	5.1	Mitsubishi	4.3	Jeep	2.4		
Lexus	8.6	Ford	6.0	Honda	4.9	Vauxhall	4.2	Fiat	2.0		
Suzuki	7.9	Land Rover	6.0	Skoda	4.9	Renault	4.1	Alfa Romeo	1.4		
Seat	7.7	Volkswagen	5.7	Nissan	4.8	Jaguar	3.4			Average	5.3

Q12: Thinking about the value of this franchise, how likely are you to recommend this brand?

Kia	9.0	Audi	7.6	Volkswagen	5.4	Subaru	4.4	Jaguar	2.9		
Mercedes	9.0	Mazda	7.4	Peugeot	5.2	Hyundai	4.3	Abarth	2.3		
Toyota	9.0	BMW	6.6	Skoda	5.1	Renault	4.0	Jeep	2.3		
Lexus	8.7	Land Rover	6.3	Volvo	5.0	Mitsubishi	3.7	Fiat	1.8		
Suzuki	8.2	Ford	5.9	Nissan	4.9	Citroen	3.0	Alfa Romeo	1.4		
Seat	7.7	Mini	5.8	Honda	4.4	Vauxhall	3.0			Average	5.2