

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY



NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY RESULTS

SPRING 2017

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NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY SPRING 2017

We are pleased to reveal the findings of the latest Motorcycle Dealer Attitude Survey conducted in March 2017 by the National Motorcycle Dealers Association (NMDA), which represents the interests of the UK's franchised motorcycle 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 motorcycle dealers and their respective manufacturers a clear idea of the balance of opinion held on a range of views within their networks.

Over the last few years there has been a view that brands with a low percentage of dealer responses are not necessarily representative of the views of that network and they could skew the results either way. Therefore, for this survey, we have decided to suppress the results of those brands that had less than 15% of their dealers completing the survey.

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 five point scale, running from 1 - very dissatisfied/very poor to 5 - very satisfied/very good (question 18 is rated from 1 - very poor to 10 - excellent).

The numerical rankings for this survey are featured at the back of this report.

National Motorcycle Dealers Association

May 2017

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NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY



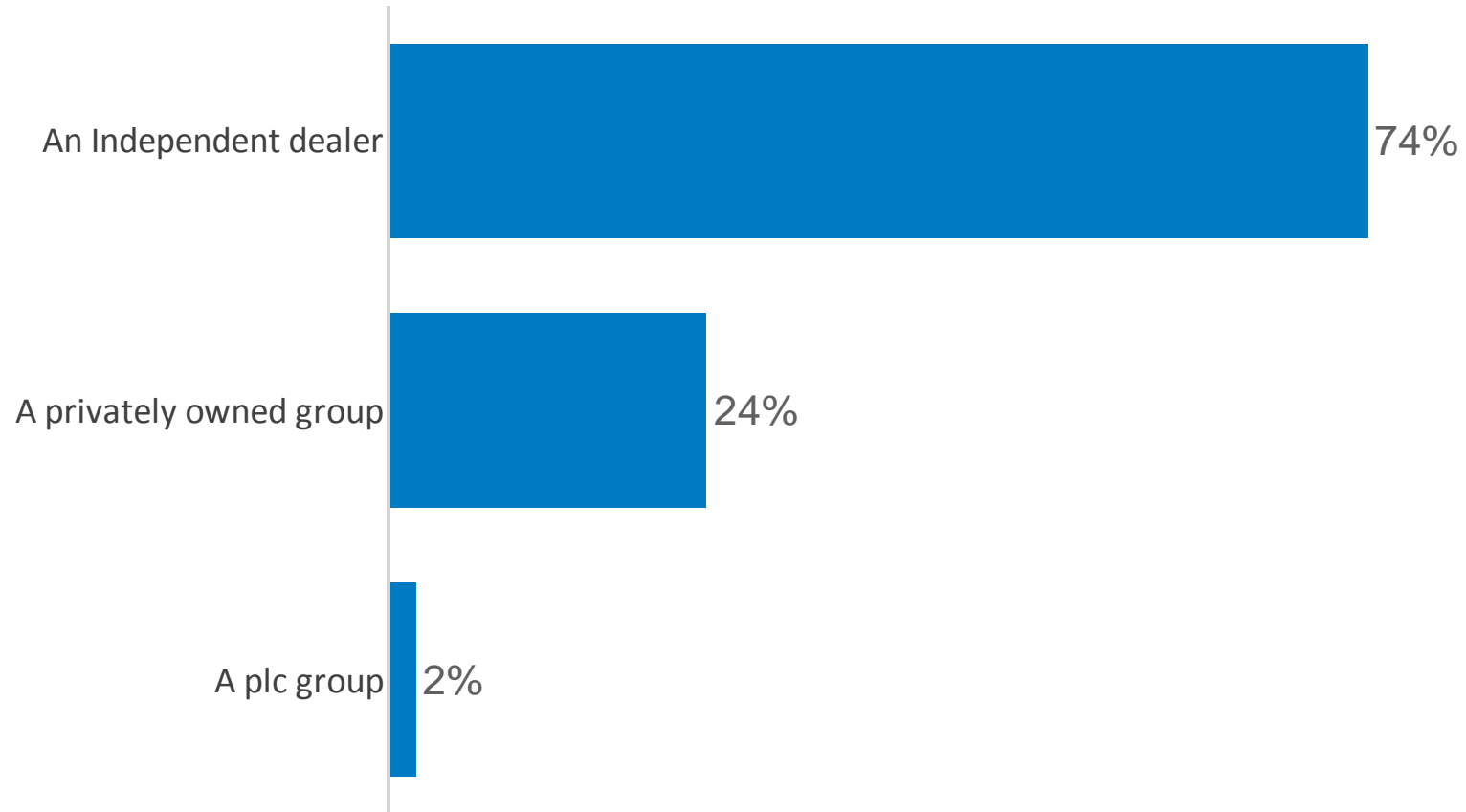
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BREAKDOWN OF RESPONSES

FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
DUCATI	6	37	16
HARLEY DAVIDSON	9	29	31
HONDA	38	67	57
KAWASAKI	16	61	26
KTM	9	39	23
PIAGGIO GROUP	27	70	39
SUZUKI	29	93	31
TRIUMPH	17	49	35
YAMAHA	27	119	23
TOTAL	180	564	32

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Q2 In this site are you:

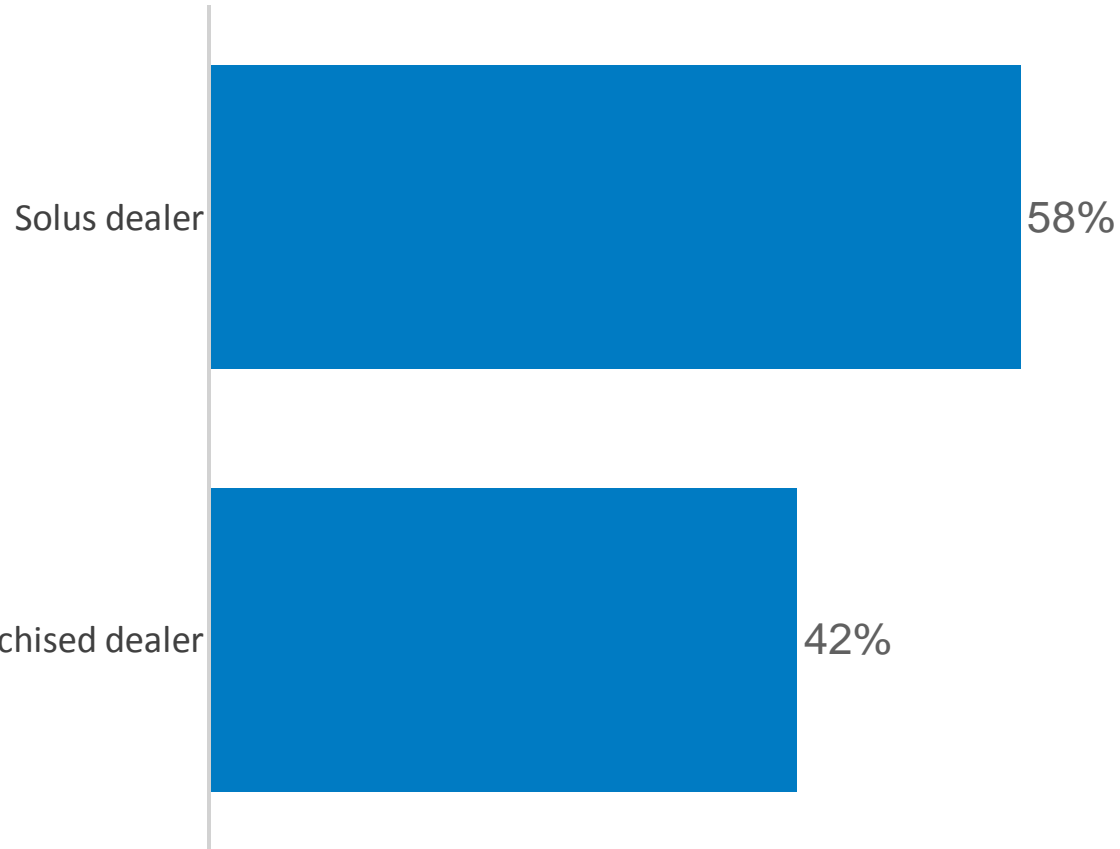


AUTUMN 2016 SURVEY RESULTS

INDEPENDENT	83%
PRIVATELY OWNED	17%
PLC GROUP	1%

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Q3 Is this site:

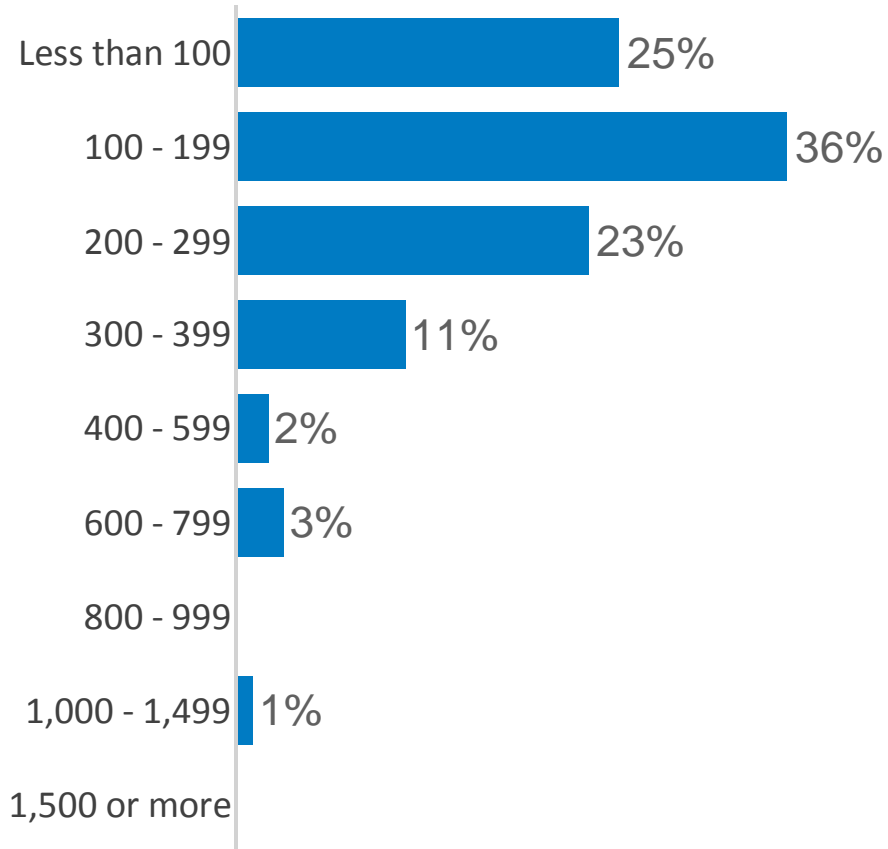


AUTUMN 2016 SURVEY RESULTS

SOLUS	60%
MULTI-FRANCHISED	40%

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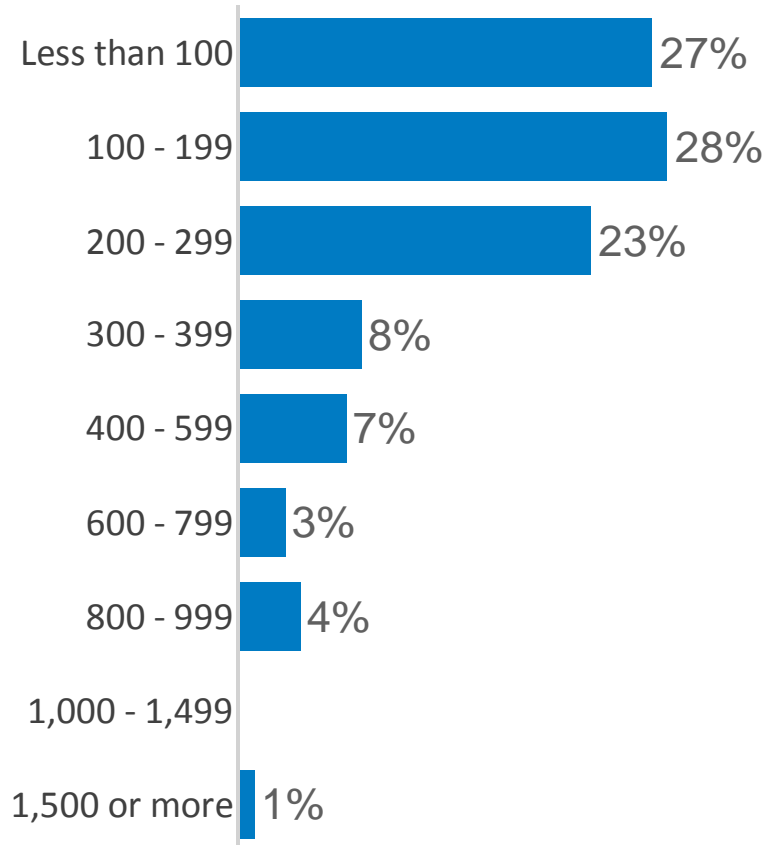
Q4 How many new motorcycles do you sell per annum?



AUTUMN 2016 SURVEY RESULTS			
Less than 100	26%	400 – 599	3%
100 – 199	38%	600 – 799	1%
200 – 299	24%	800 – 999	0%
300 – 399	7%	1000 – 1499	1%
1500 or more	0%		

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Q5 How many used motorcycles do you sell per annum?

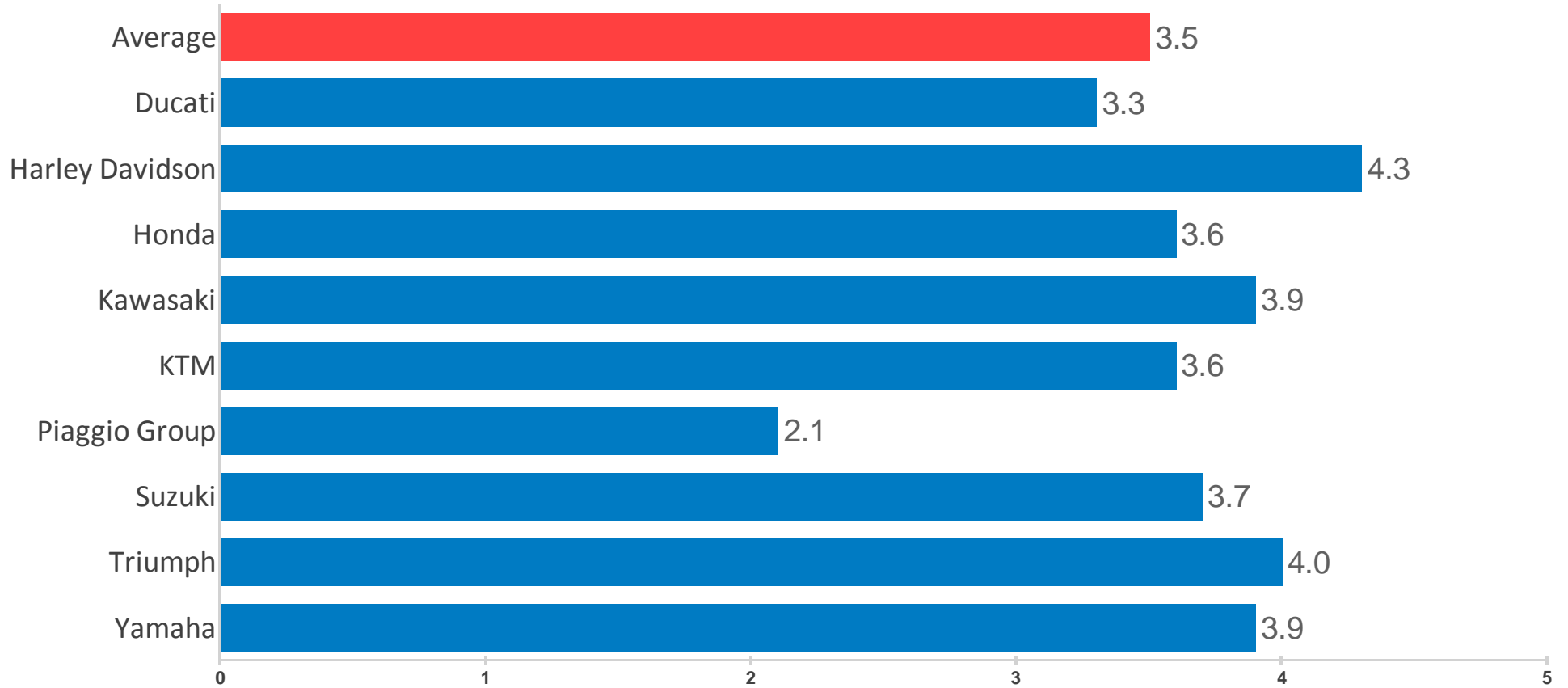


AUTUMN 2016 SURVEY RESULTS

Less than 100	21%	400 – 599	9%
100 – 199	31%	600 – 799	1%
200 – 299	22%	800 – 999	0%
300 – 399	14%	1000 – 1499	2%
1500 or more	0%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q6 a) The product's price and value against other brands

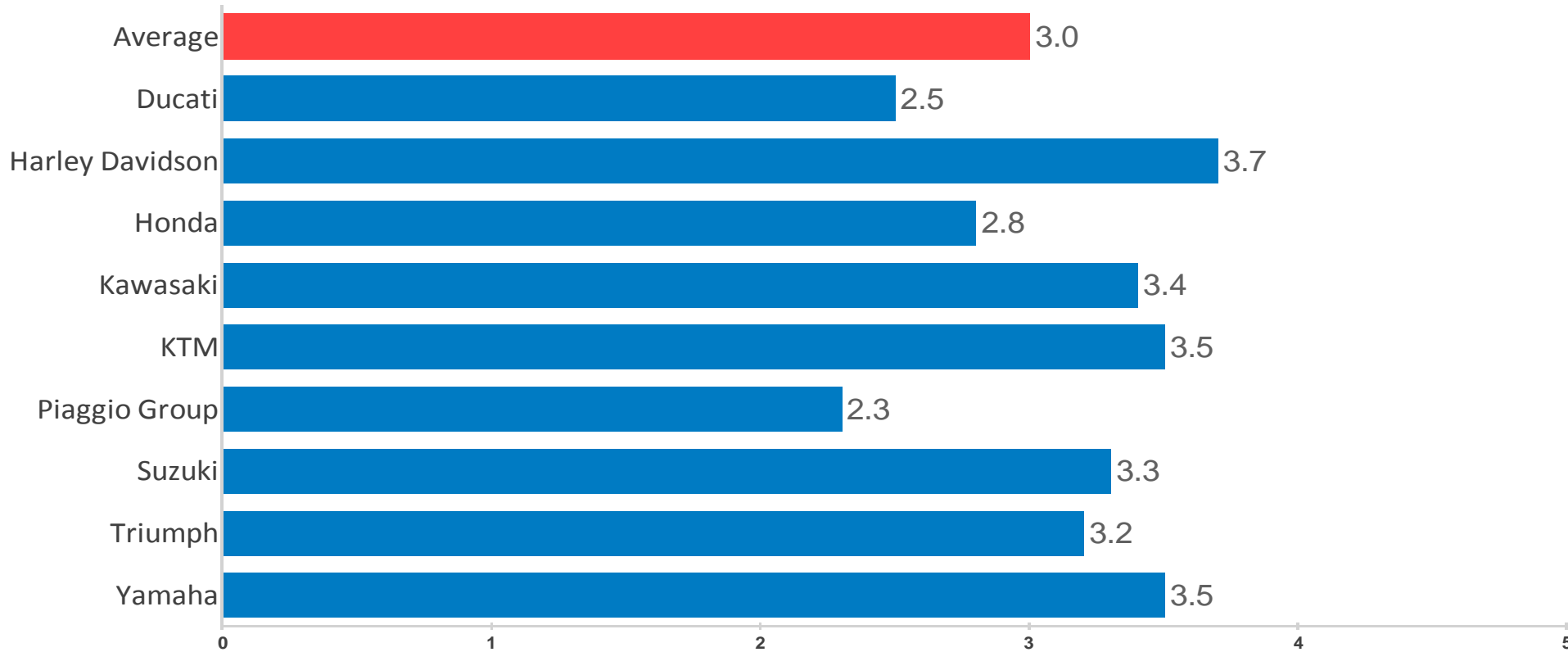


PREVIOUS SURVEY RESULTS – AUTUMN 2016

6a: The product's price and value against other brands			
Ducati	2.7	Triumph	4.0
Harley Davidson	4.2	Yamaha	4.0
Honda	3.6		
Kawasaki	3.6		
KTM	3.7		
Piaggio Group	3.2		
Suzuki	3.6	AVERAGE	3.7

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Q6 b) How realistic is your target and performance related bonus in terms of achievement

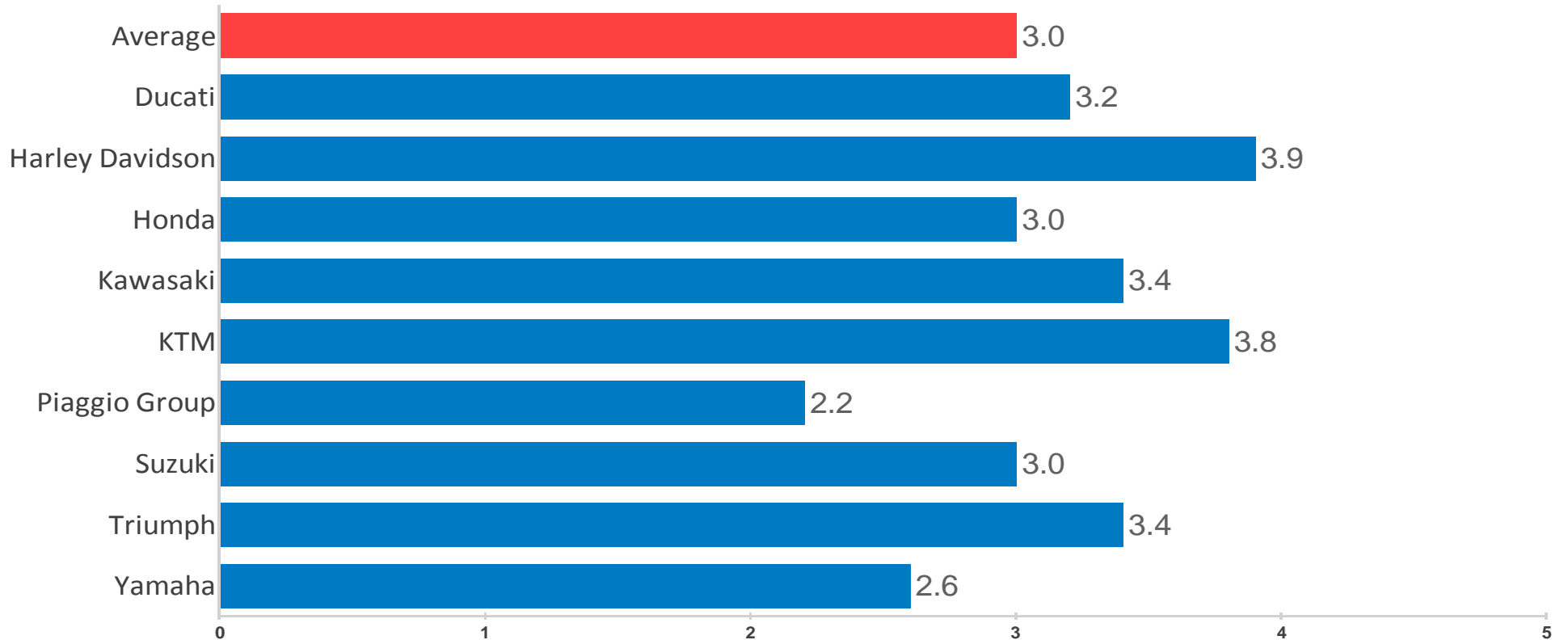


PREVIOUS SURVEY RESULTS – AUTUMN 2016

6b: How realistic is your target and performance related bonus in terms of achievement			
Ducati	2.4	Triumph	3.2
Harley Davidson	4.0	Yamaha	3.5
Honda	3.1		
Kawasaki	3.3		
KTM	3.9		
Piaggio Group	2.8		
Suzuki	3.4	AVERAGE	3.2

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Q7 a) Your manufacturer's policy for the supply and stocking of motorcycles

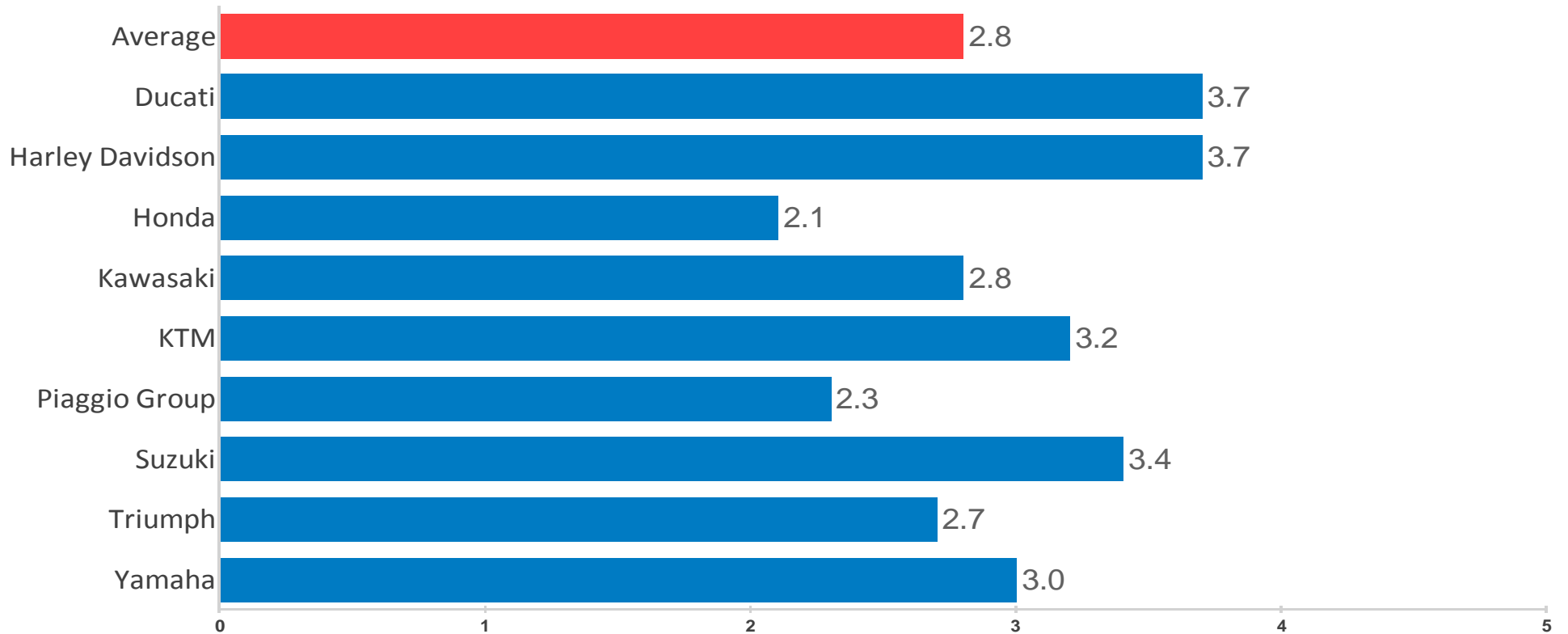


PREVIOUS SURVEY RESULTS – AUTUMN 2016

7a: The fairness of your manufacturer's policy for the supply and stocking of motorcycles			
Ducati	3.0	Triumph	3.3
Harley Davidson	4.0	Yamaha	3.1
Honda	2.8		
Kawasaki	3.4		
KTM	3.4		
Piaggio Group	2.5		
Suzuki	2.8	AVERAGE	3.0

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Q7 b) The new motorcycle target negotiating process

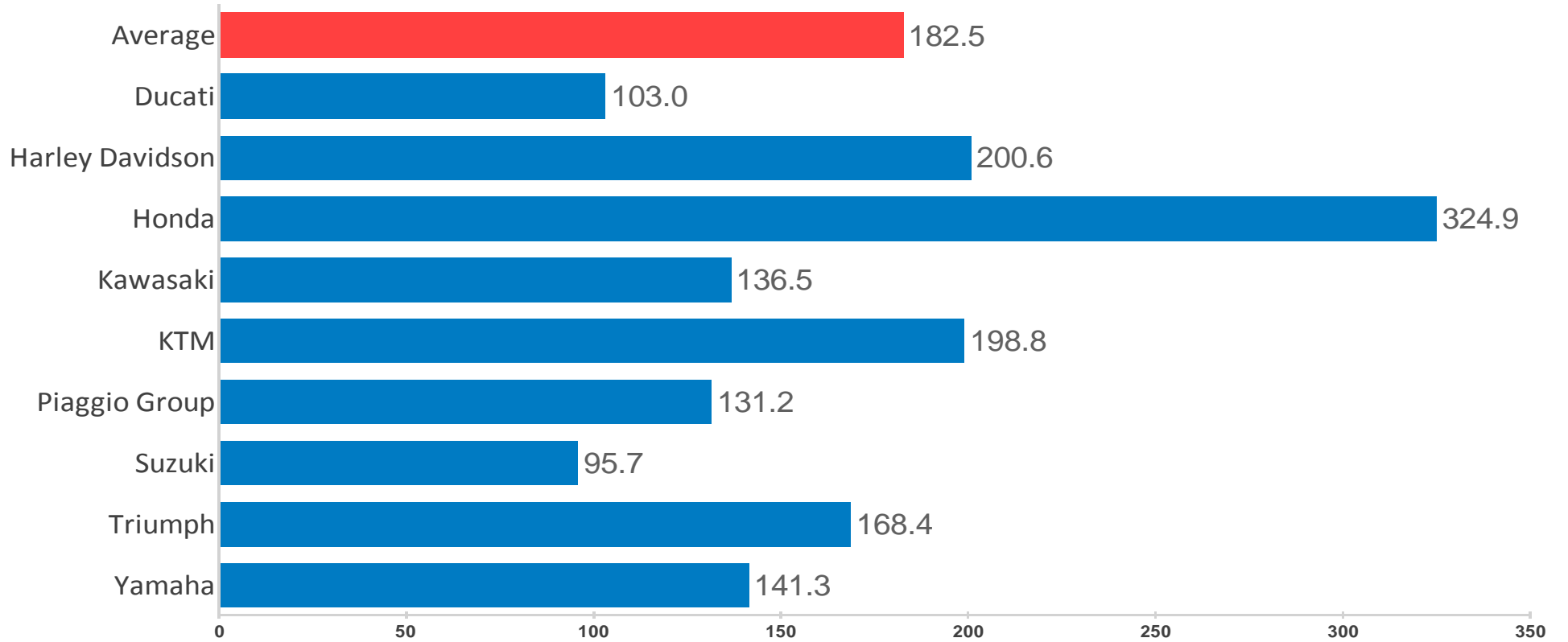


PREVIOUS SURVEY RESULTS – AUTUMN 2016

7b: Your new motorcycle target negotiating process			
Ducati	2.4	Triumph	2.3
Harley Davidson	3.8	Yamaha	3.0
Honda	2.8		
Kawasaki	2.8		
KTM	3.1		
Piaggio Group	2.2		
Suzuki	3.4	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q7c) What is your annual target for this brand?

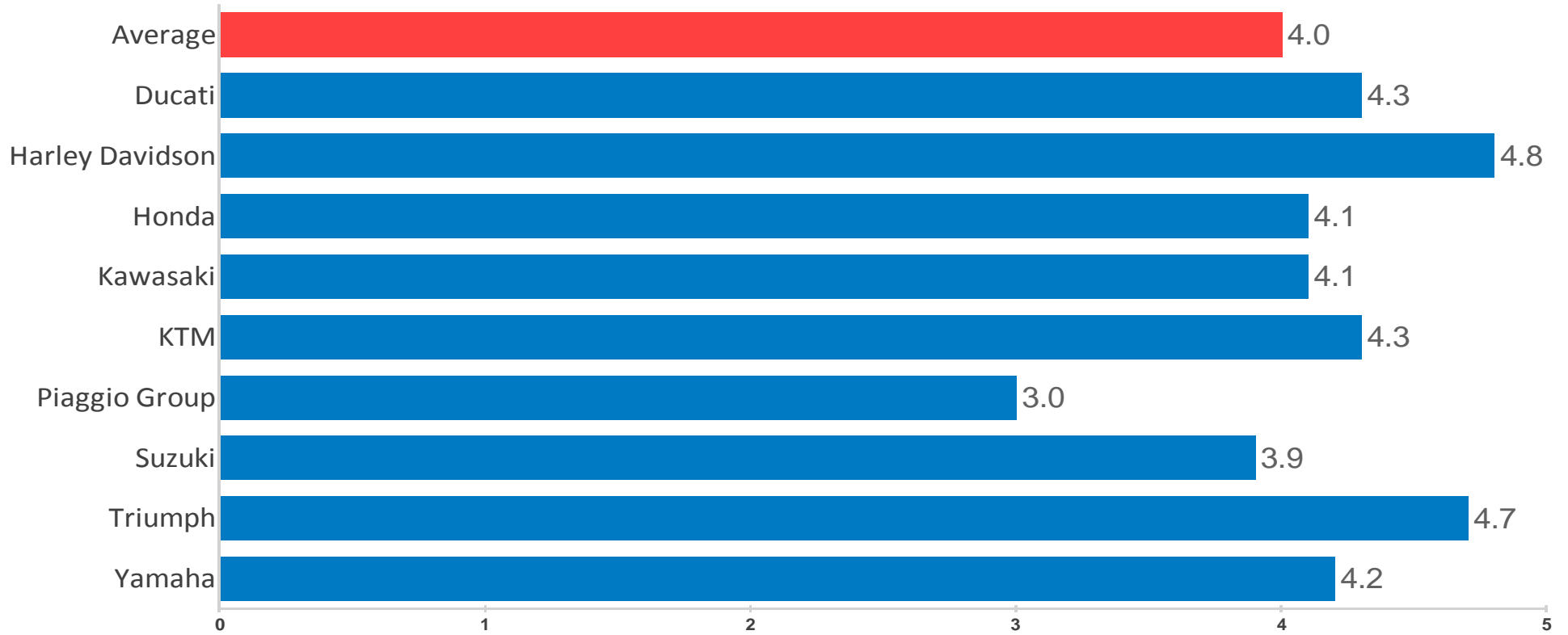


PREVIOUS SURVEY RESULTS – AUTUMN 2016

7c: What is your annual target for this brand			
Ducati	104.0	Triumph	213.0
Harley Davidson	181.2	Yamaha	163.5
Honda	243.7		
Kawasaki	104.1		
KTM	223.7		
Piaggio Group	83.5		
Suzuki	75.2	AVERAGE	172.3

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Q8 a) The brand image

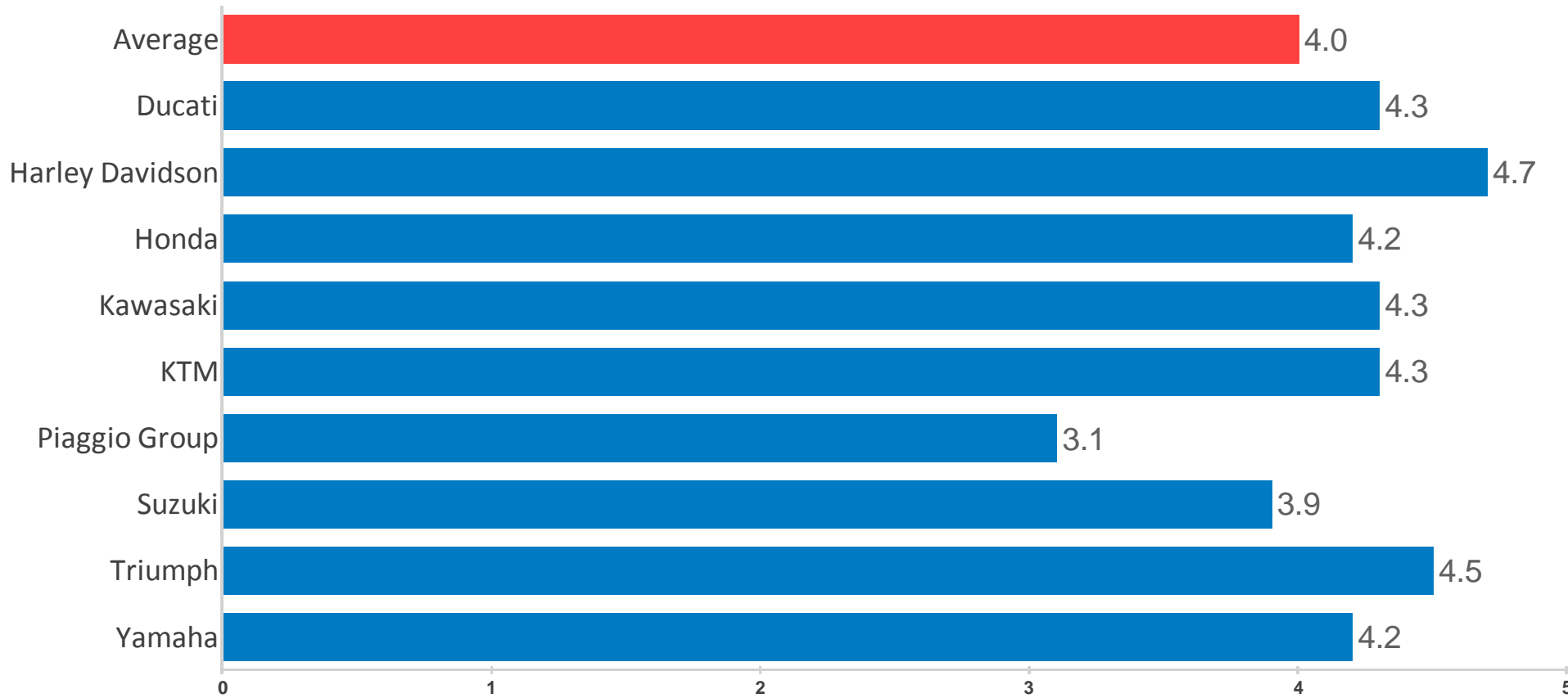


PREVIOUS SURVEY RESULTS – AUTUMN 2016

8a: The brand image			
Ducati	4.2	Triumph	4.5
Harley Davidson	4.6	Yamaha	4.1
Honda	4.1		
Kawasaki	3.9		
KTM	4.6		
Piaggio Group	3.2		
Suzuki	3.2	AVERAGE	4.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q8 b) The product image

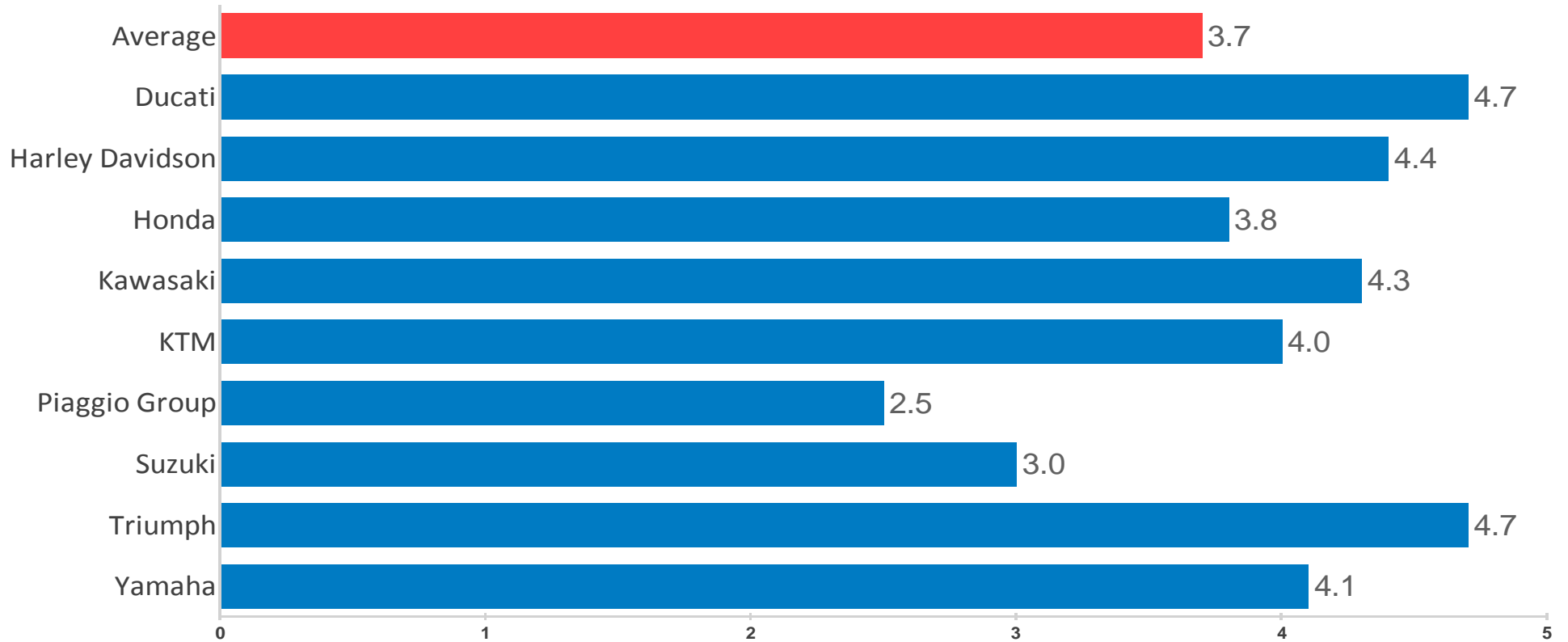


PREVIOUS SURVEY RESULTS – AUTUMN 2016

8b: The product image			
Ducati	4.1	Triumph	4.6
Harley Davidson	4.8	Yamaha	4.1
Honda	3.9		
Kawasaki	4.1		
KTM	4.6		
Piaggio Group	3.2		
Suzuki	3.2	AVERAGE	4.0

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Q8 c) Frequency of introduction of new models

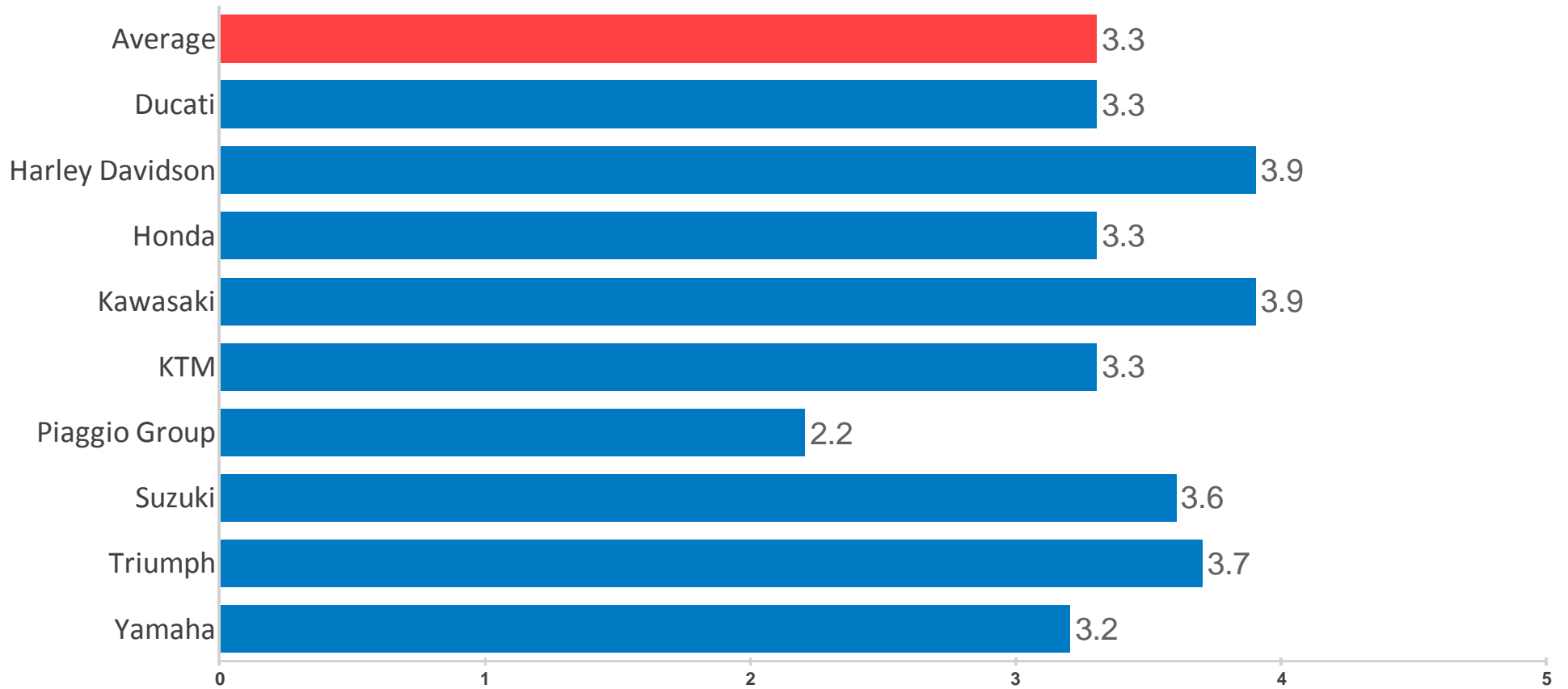


PREVIOUS SURVEY RESULTS – AUTUMN 2016

8c: Frequency of introduction of new models			
Ducati	4.4	Triumph	4.5
Harley Davidson	4.0	Yamaha	4.5
Honda	3.3		
Kawasaki	3.8		
KTM	4.3		
Piaggio Group	2.4		
Suzuki	1.9	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q8 d) Retail sales incentives and promotions

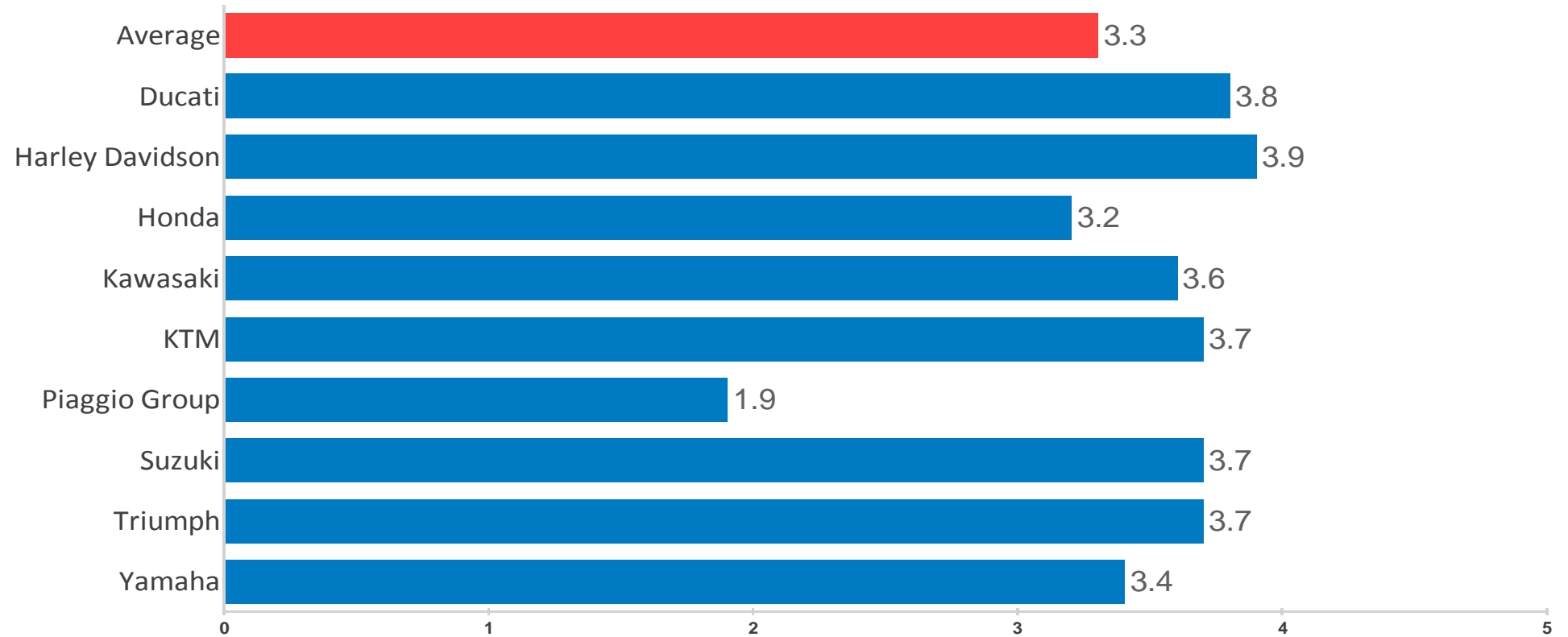


PREVIOUS SURVEY RESULTS – AUTUMN 2016

8d: Retail sales incentives and promotions			
Ducati	2.4	Triumph	3.8
Harley Davidson	3.6	Yamaha	3.9
Honda	3.5		
Kawasaki	3.5		
KTM	3.6		
Piaggio Group	2.4		
Suzuki	4.1	AVERAGE	3.5

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Q8 e) Product advertising

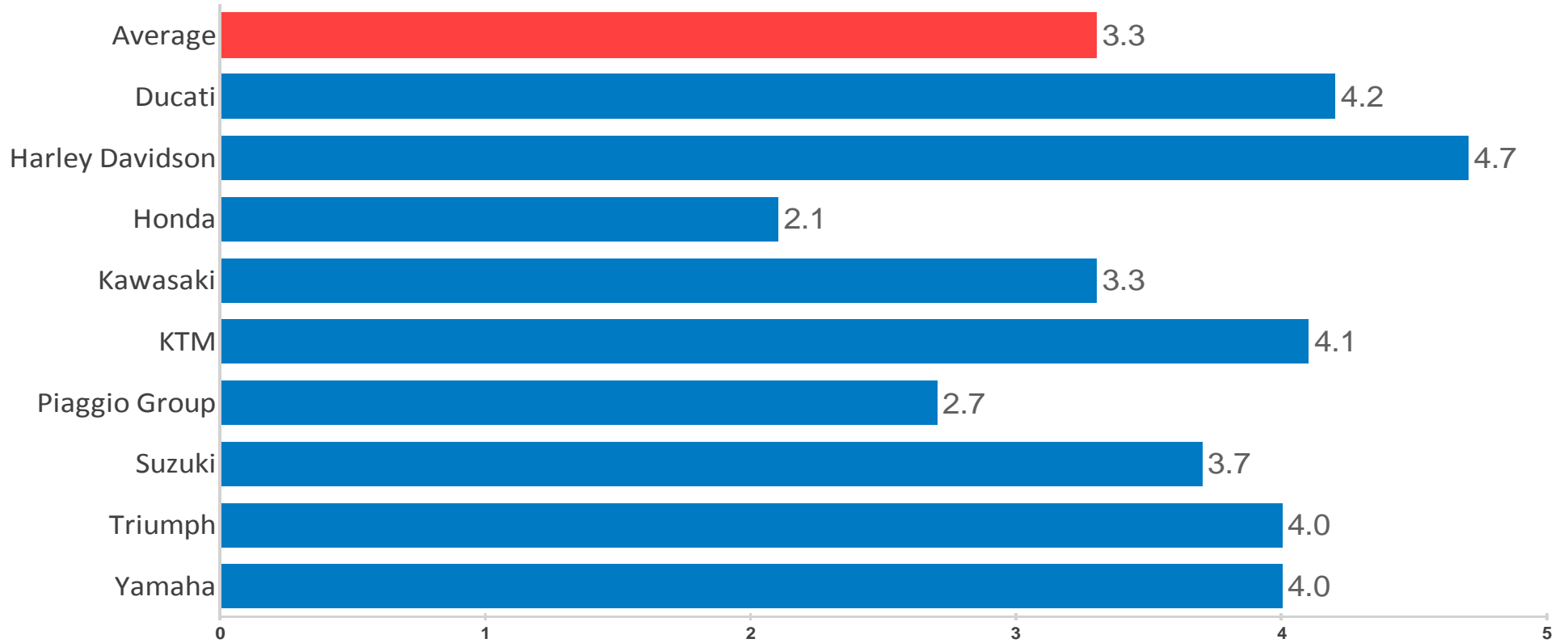


PREVIOUS SURVEY RESULTS – AUTUMN 2016

8e: Product advertising			
Ducati	2.9	Triumph	3.8
Harley Davidson	3.4	Yamaha	3.6
Honda	3.3		
Kawasaki	3.1		
KTM	3.6		
Piaggio Group	1.9		
Suzuki	3.3	AVERAGE	3.2

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Q8 f) Have a comprehensive accessory offering that appeals to customers

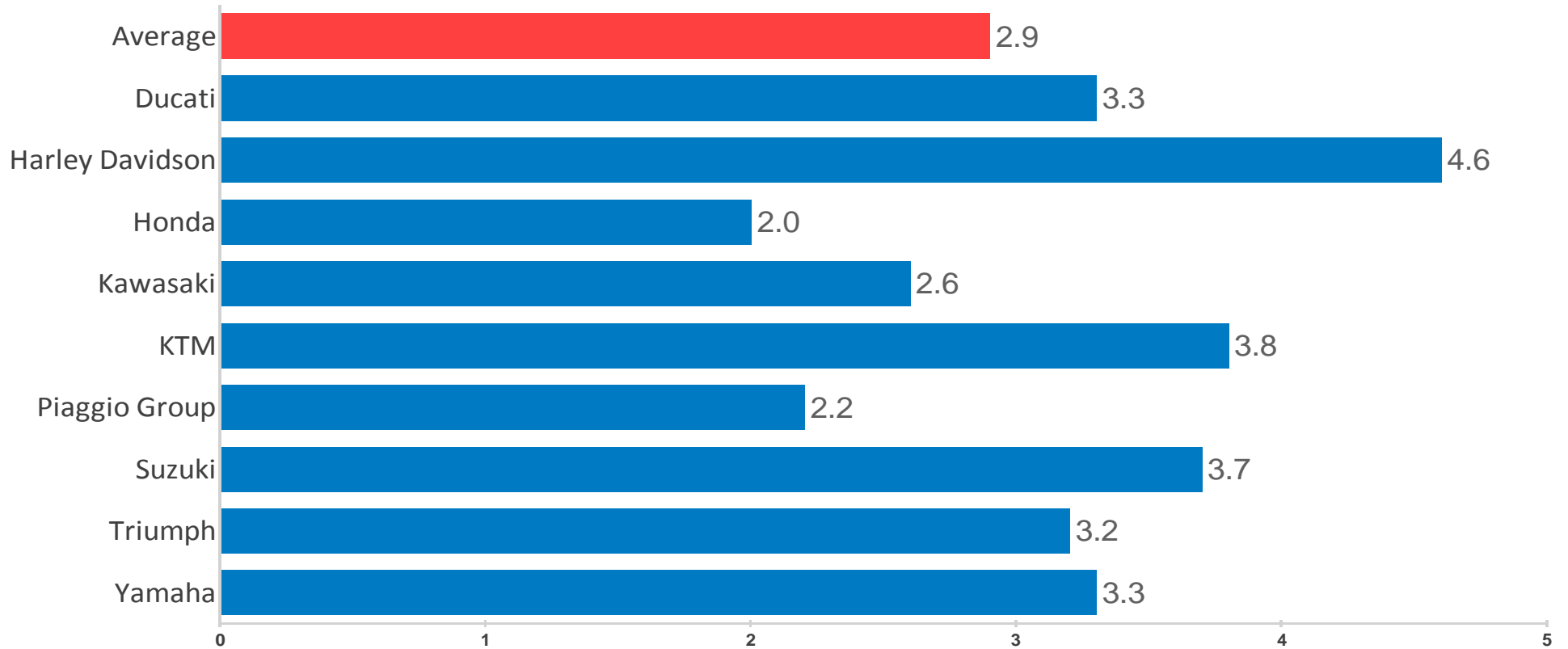


PREVIOUS SURVEY RESULTS – AUTUMN 2016

8f: Have a comprehensive accessory offering that appeals to customers			
Ducati	4.0	Triumph	4.1
Harley Davidson	4.8	Yamaha	4.1
Honda	2.8		
Kawasaki	3.1		
KTM	4.6		
Piaggio Group	2.4		
Suzuki	3.3	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q8 g) Have a comprehensive clothing offering that appeals to customers

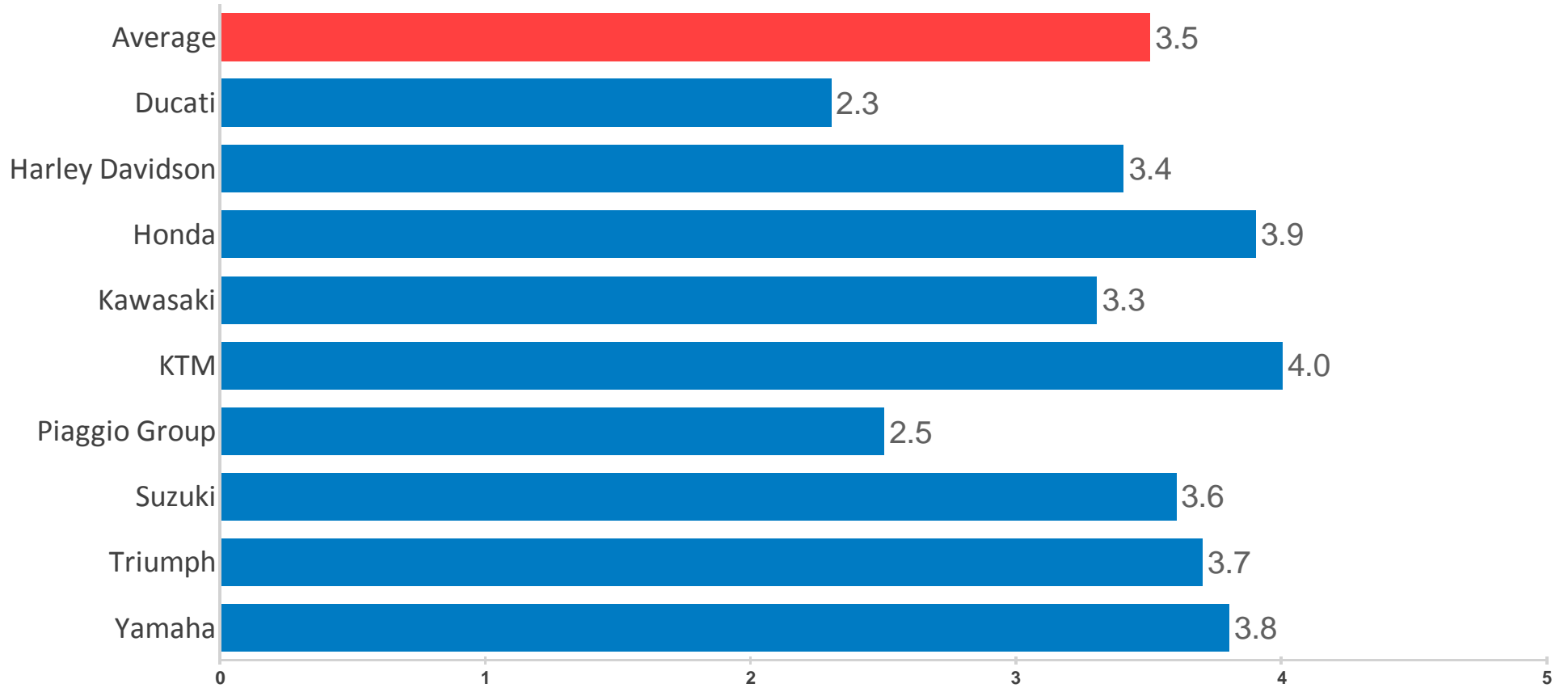


PREVIOUS SURVEY RESULTS – AUTUMN 2016

8g: Have a comprehensive clothing offering that appeals to customers			
Ducati	3.3	Triumph	3.6
Harley Davidson	5.0	Yamaha	3.4
Honda	2.5		
Kawasaki	2.6		
KTM	4.3		
Piaggio Group	2.1		
Suzuki	3.4	AVERAGE	3.0

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Q9 How satisfied or dissatisfied are you with your manufacturer's warranty policy?

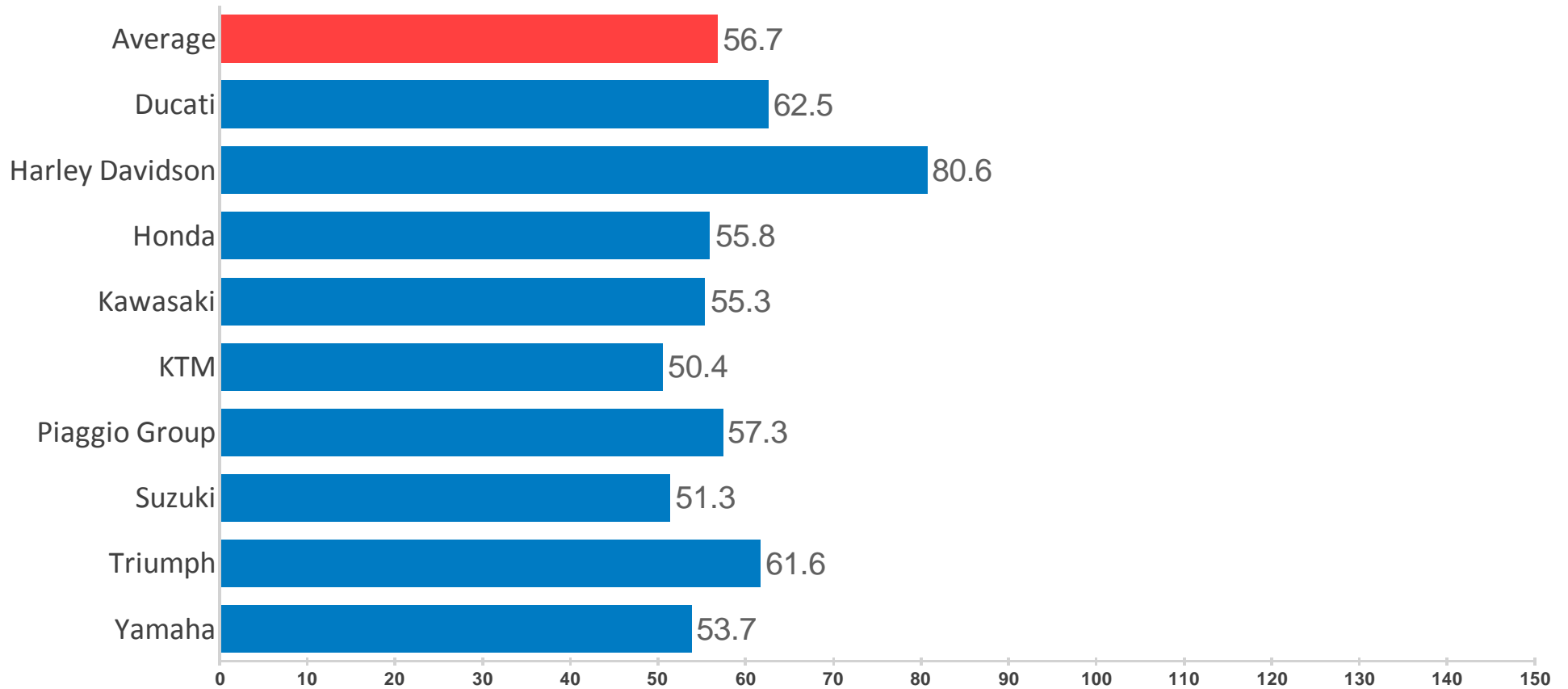


PREVIOUS SURVEY RESULTS – AUTUMN 2016

9: The fairness of your manufacturer's warranty policy			
Ducati	1.7	Triumph	3.7
Harley Davidson	3.4	Yamaha	3.8
Honda	3.7		
Kawasaki	4.4		
KTM	4.0		
Piaggio Group	2.9		
Suzuki	3.6	AVERAGE	3.6

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Q10) What is your labour rate for retail? (£)

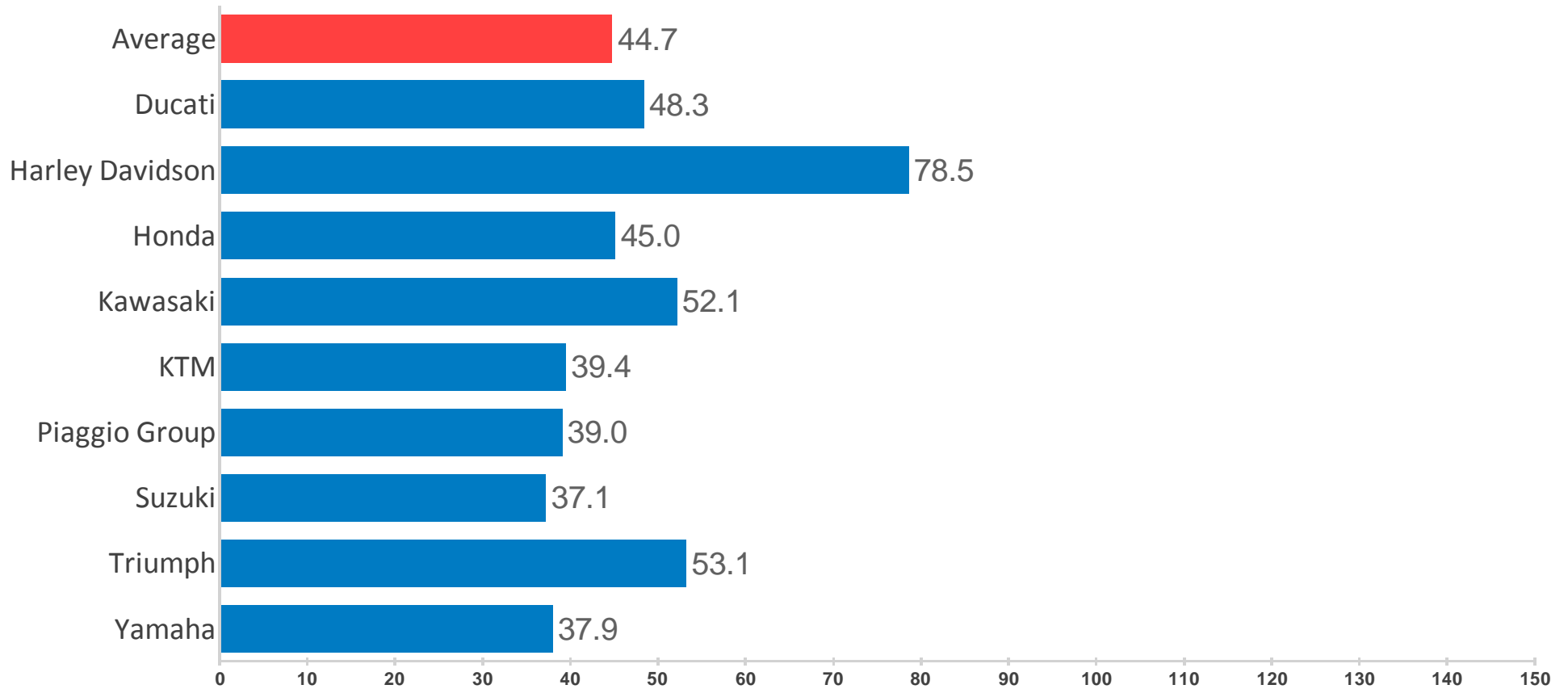


PREVIOUS SURVEY RESULTS – AUTUMN 2016

10: What is your labour rate for retail (£)			
Ducati	57.8	Triumph	54.7
Harley Davidson	75.0	Yamaha	51.9
Honda	55.5		
Kawasaki	51.7		
KTM	51.7		
Piaggio Group	52.0		
Suzuki	50.7	AVERAGE	54.1

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Q11) What is your labour rate for warranty before VAT (£)

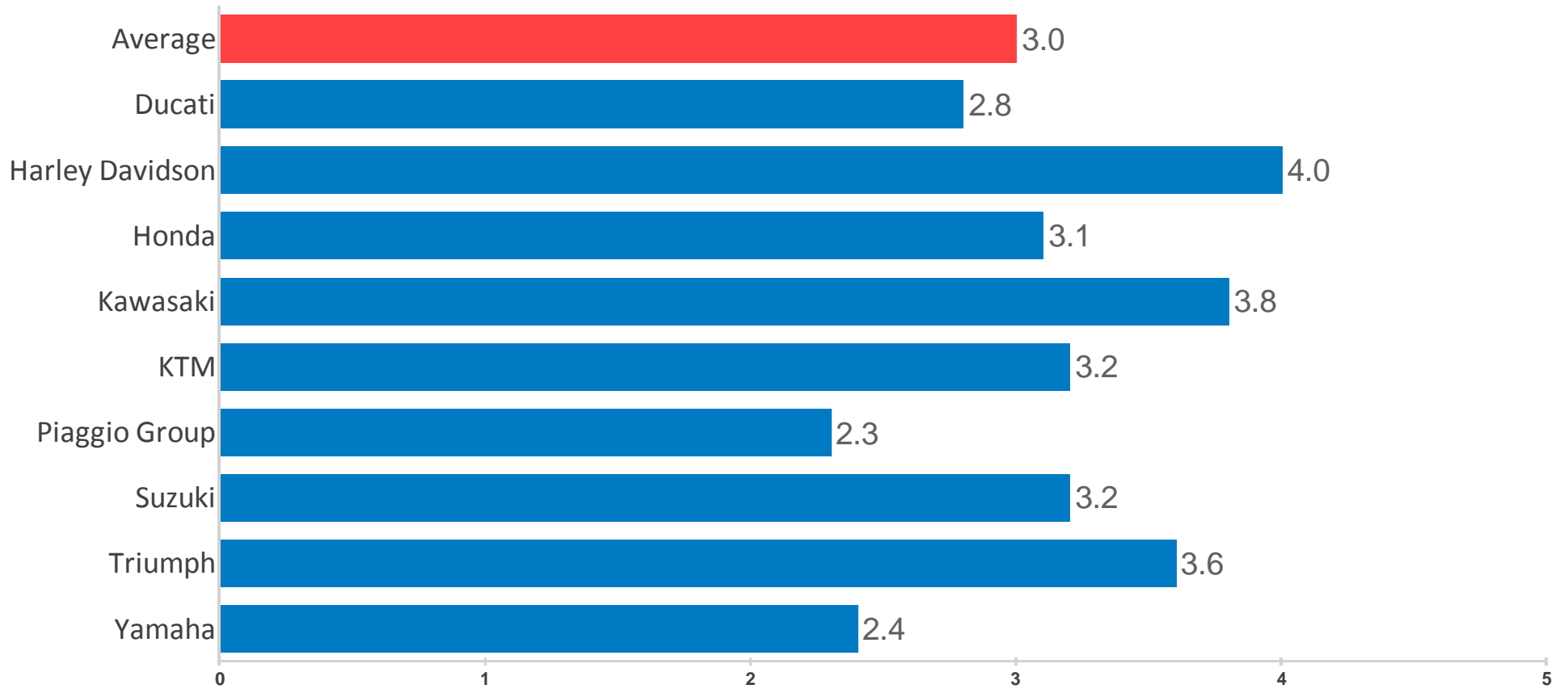


PREVIOUS SURVEY RESULTS – AUTUMN 2016

11. What is your labour rate for warranty (£)			
Ducati	44.3	Triumph	47.3
Harley Davidson	75.0	Yamaha	41.3
Honda	44.6		
Kawasaki	50.1		
KTM	37.0		
Piaggio Group	36.9		
Suzuki	40.2	AVERAGE	44.2

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Q12 a) Warranty labour rate

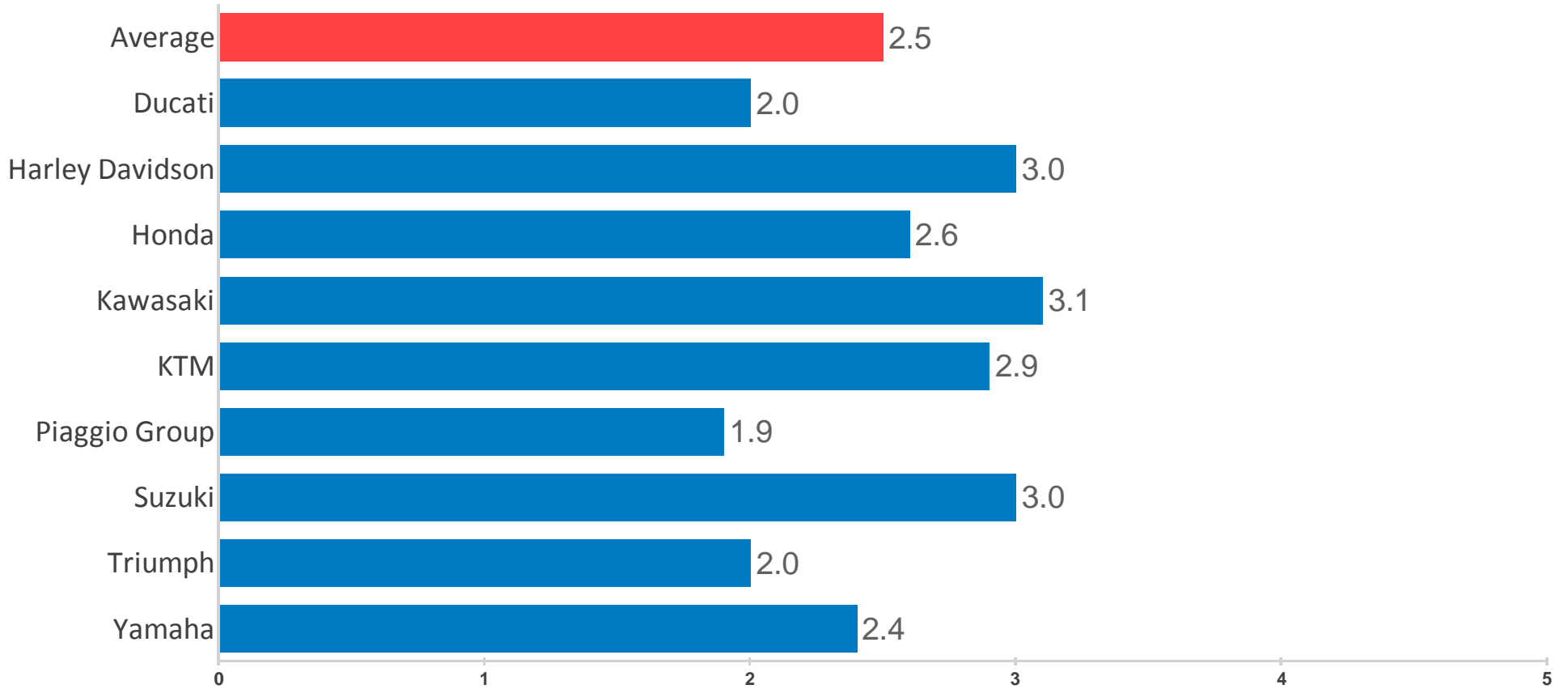


PREVIOUS SURVEY RESULTS – AUTUMN 2016

12a: Warranty labour rate			
Ducati	1.7	Triumph	3.7
Harley Davidson	5.0	Yamaha	3.0
Honda	3.1		
Kawasaki	4.3		
KTM	2.6		
Piaggio Group	2.4		
Suzuki	2.7	AVERAGE	3.1

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Q12 b) Warranty time allowances

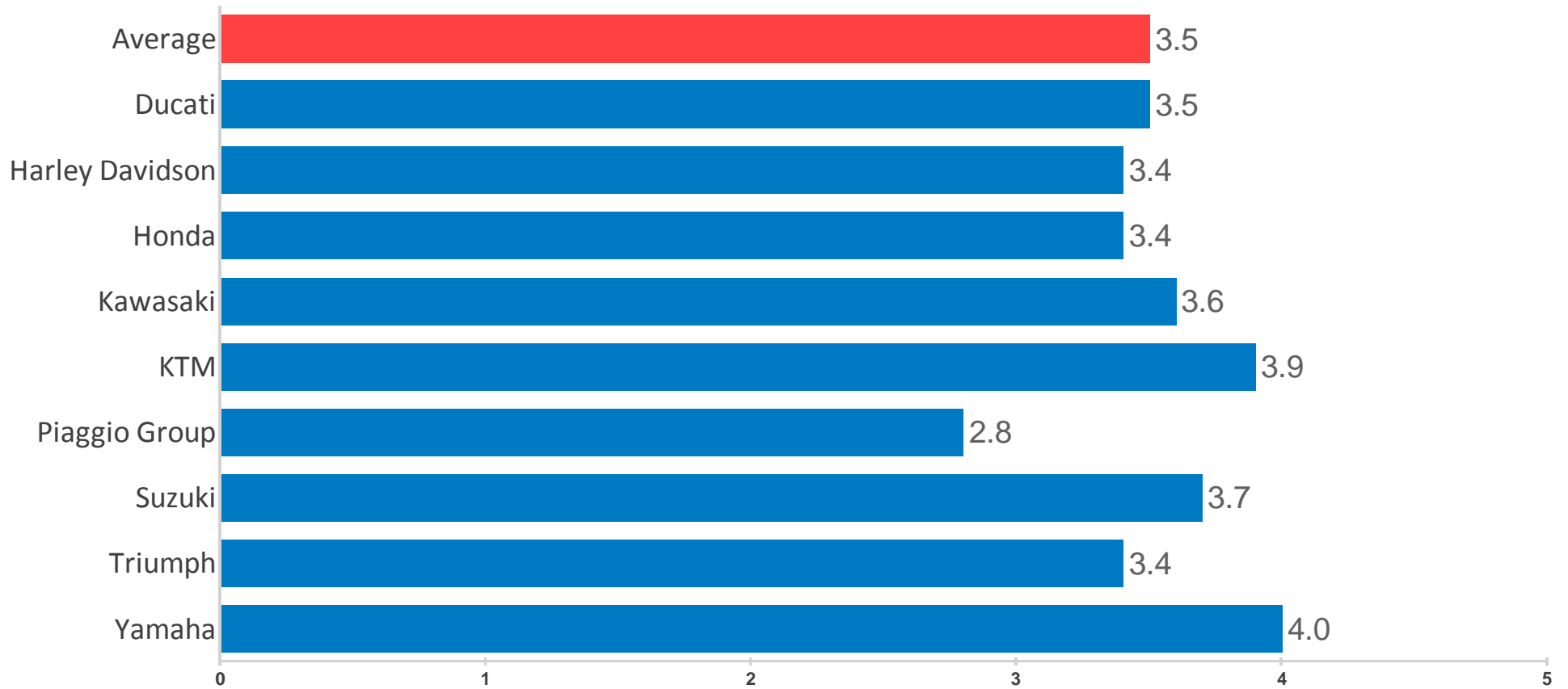


PREVIOUS SURVEY RESULTS – AUTUMN 2016

12b: Warranty time allowances			
Ducati	1.3	Triumph	2.4
Harley Davidson	3.2	Yamaha	2.8
Honda	2.7		
Kawasaki	3.4		
KTM	2.4		
Piaggio Group	2.2		
Suzuki	2.6	AVERAGE	2.6

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Q12 c) Warranty replacement parts policy

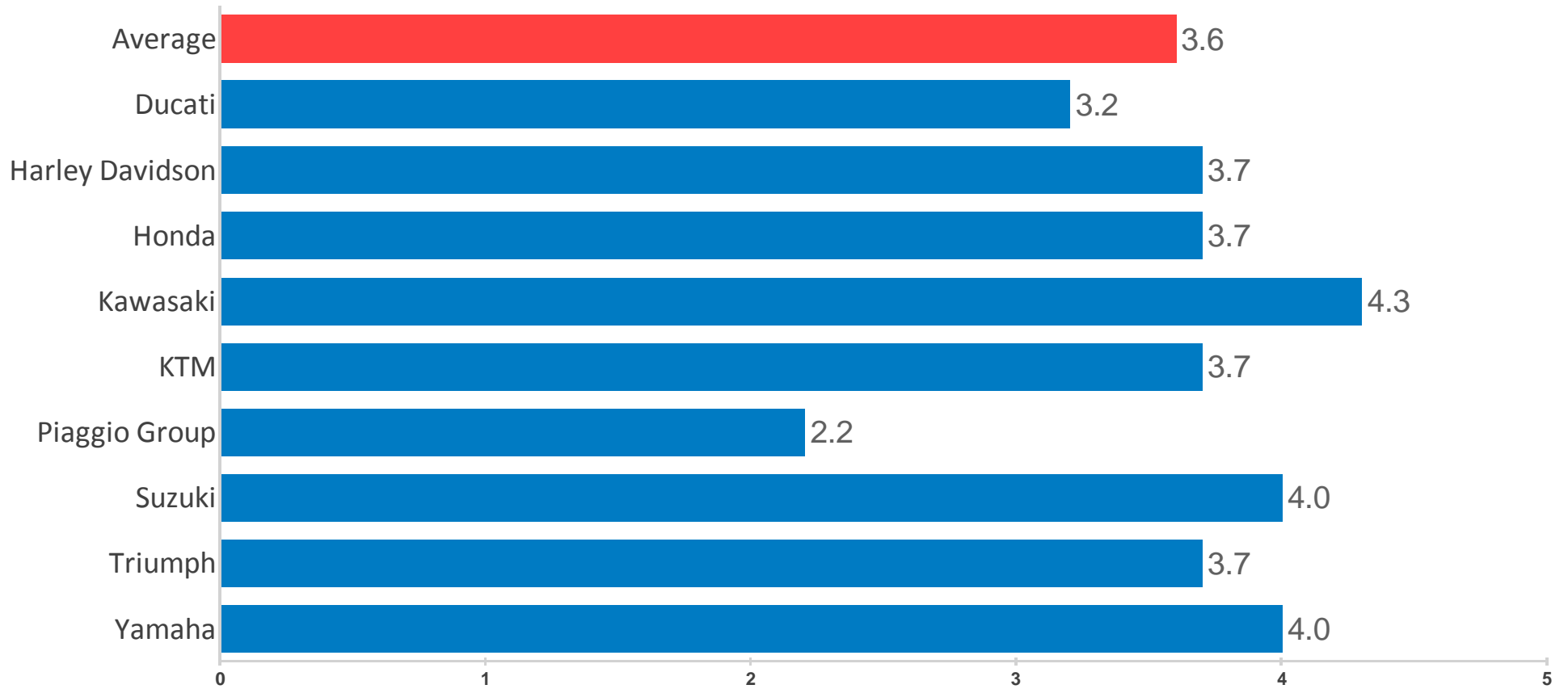


PREVIOUS SURVEY RESULTS – AUTUMN 2016

12c: Warranty replacement parts policy			
Ducati	2.4	Triumph	3.5
Harley Davidson	3.4	Yamaha	4.2
Honda	3.5		
Kawasaki	4.2		
KTM	4.0		
Piaggio Group	2.5		
Suzuki	3.4	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q12 d) Timely and fair settlement of warranty claims

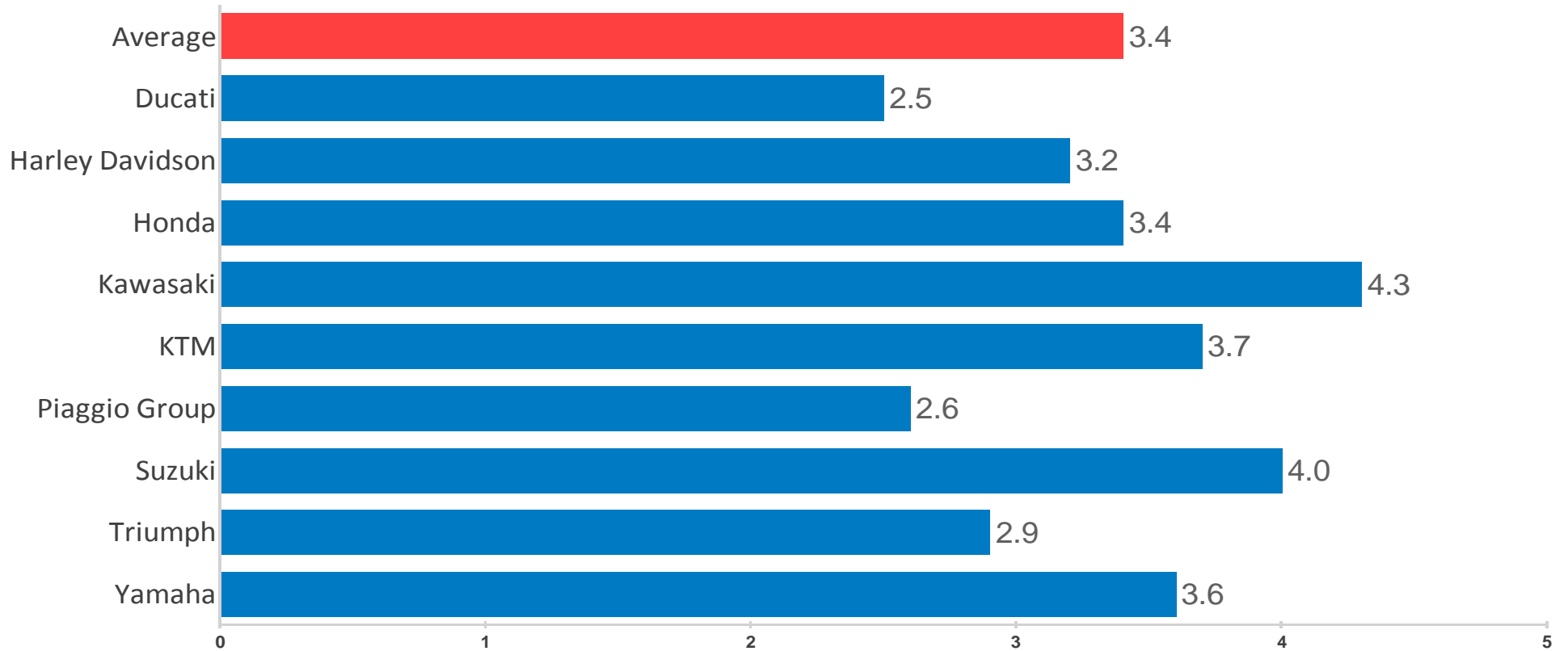


PREVIOUS SURVEY RESULTS – AUTUMN 2016

12d: Timely and fair settlement of warranty claims			
Ducati	2.2	Triumph	3.8
Harley Davidson	3.4	Yamaha	4.2
Honda	4.0		
Kawasaki	4.3		
KTM	3.9		
Piaggio Group	2.4		
Suzuki	3.6	AVERAGE	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q12 e) Quality and availability of technical support

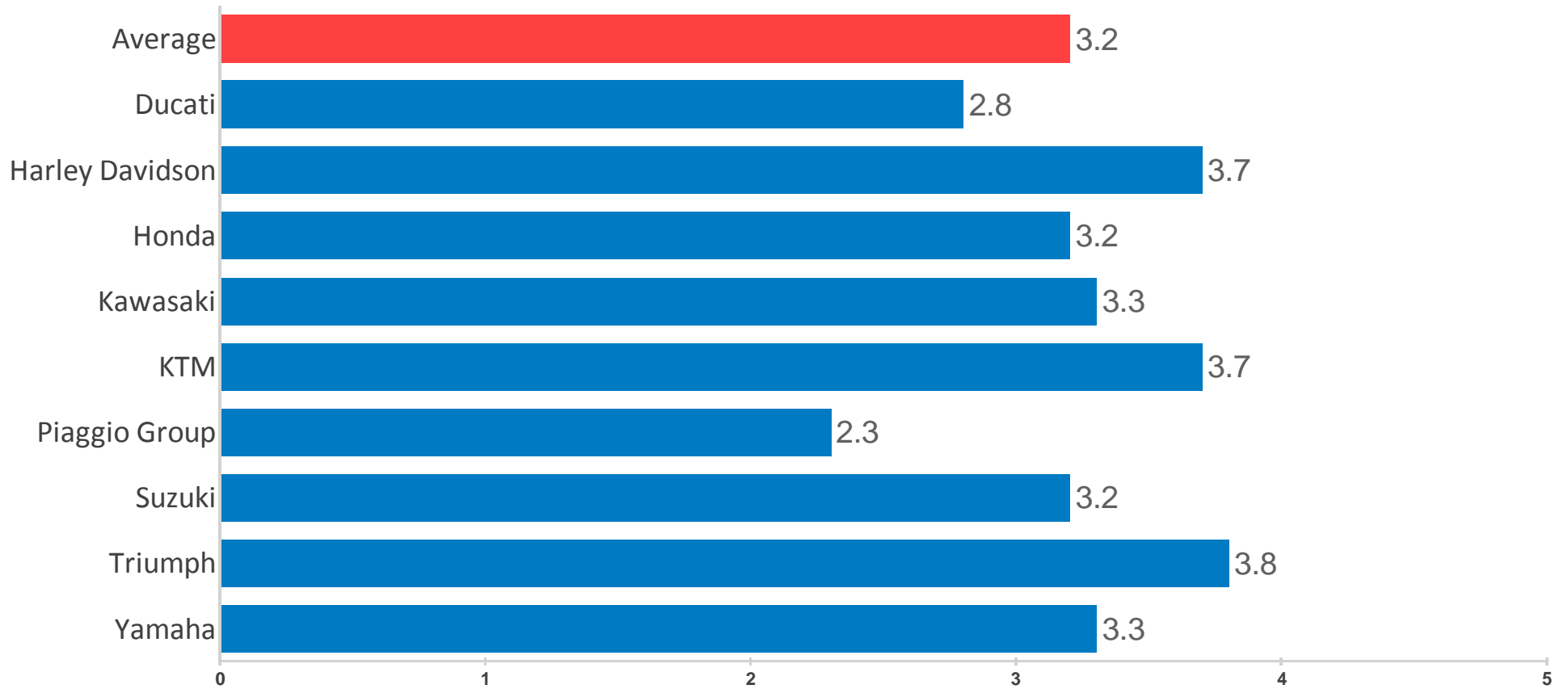


PREVIOUS SURVEY RESULTS – AUTUMN 2016

12e: Quality and availability of technical support			
Ducati	1.9	Triumph	3.3
Harley Davidson	2.6	Yamaha	3.6
Honda	3.5		
Kawasaki	4.5		
KTM	3.7		
Piaggio Group	2.4		
Suzuki	3.2	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q13 How satisfied or dissatisfied are you with the profit return by representing your franchise?

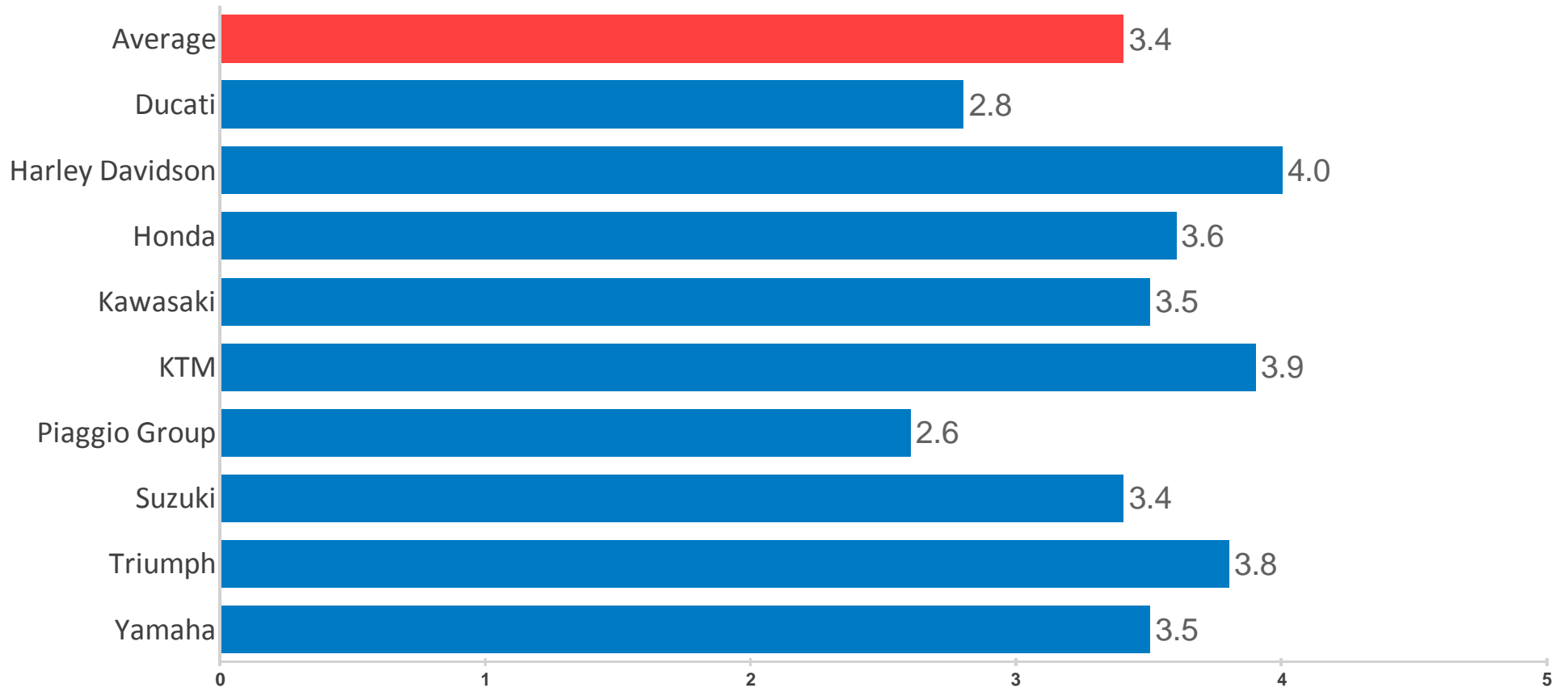


PREVIOUS SURVEY RESULTS – AUTUMN 2016

13: The profit return by representing your franchise			
Ducati	2.9	Triumph	3.7
Harley Davidson	4.4	Yamaha	3.4
Honda	2.9		
Kawasaki	3.3		
KTM	3.6		
Piaggio Group	2.8		
Suzuki	2.9	AVERAGE	3.2

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Q14 a) The future profitability of your business

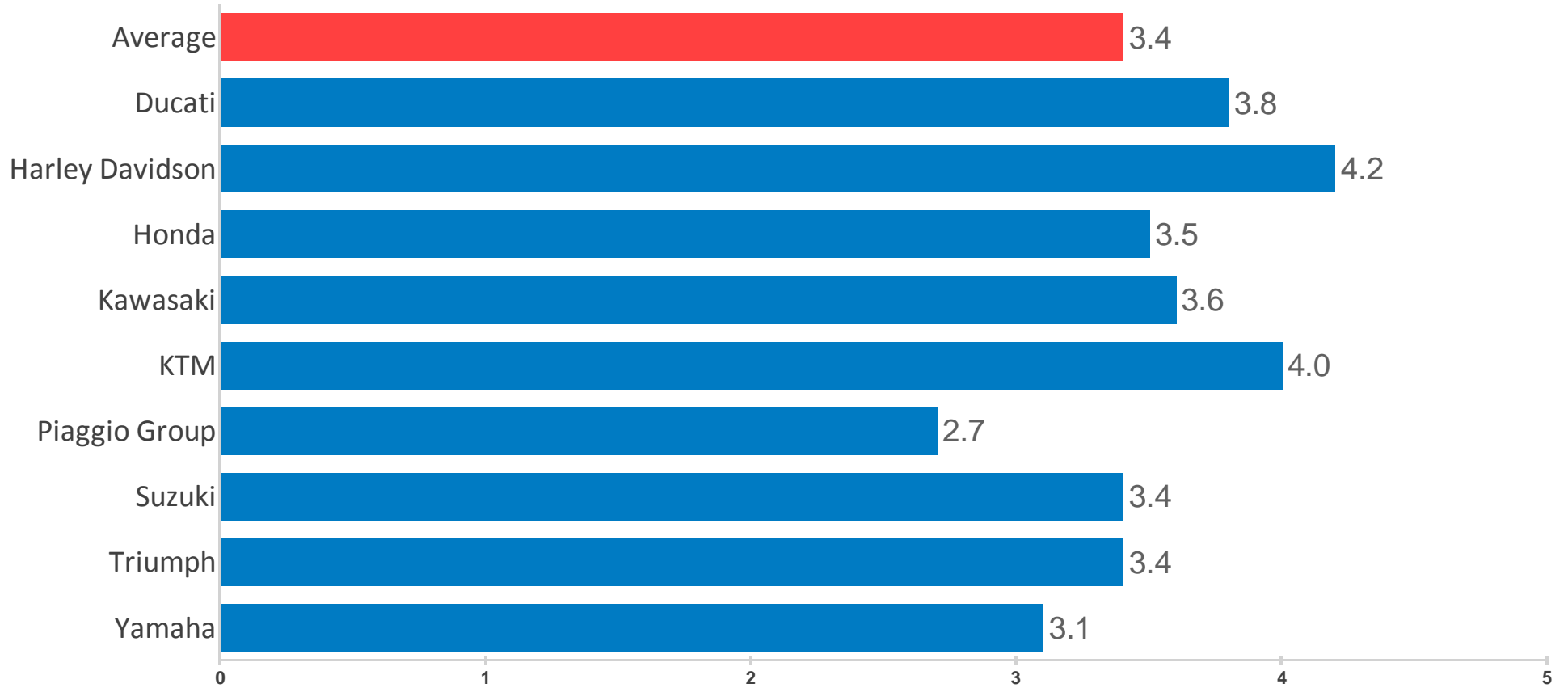


PREVIOUS SURVEY RESULTS – AUTUMN 2016

14a: The future profitability of your business			
Ducati	3.0	Triumph	3.9
Harley Davidson	4.4	Yamaha	3.6
Honda	3.4		
Kawasaki	3.3		
KTM	3.4		
Piaggio Group	2.9		
Suzuki	3.3	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q14 b) Your stocking plan for this franchise

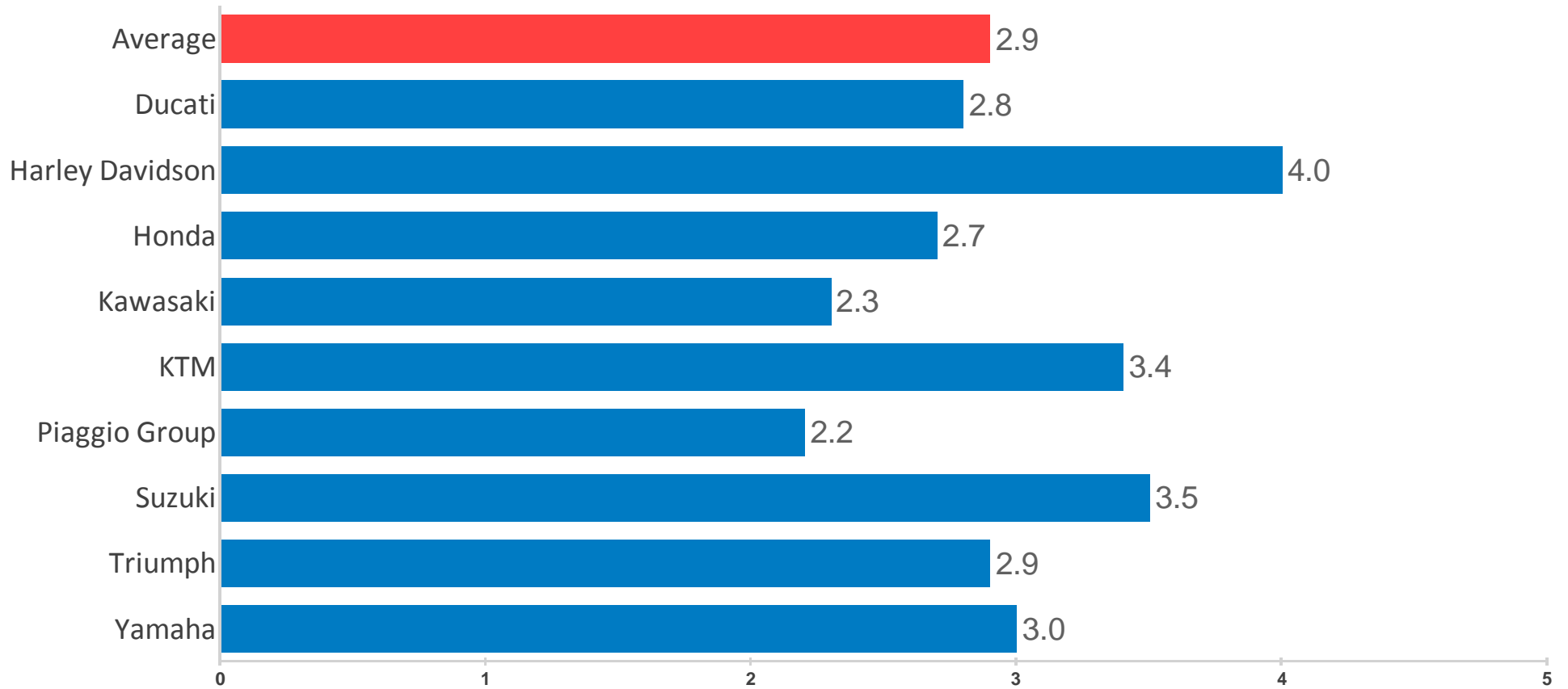


PREVIOUS SURVEY RESULTS – AUTUMN 2016

14b: Your stocking plan for this franchise			
Ducati	3.2	Triumph	3.3
Harley Davidson	4.6	Yamaha	3.5
Honda	3.4		
Kawasaki	3.5		
KTM	3.3		
Piaggio Group	2.7		
Suzuki	3.4	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q15 a) The dealer standards expected by your manufacturer

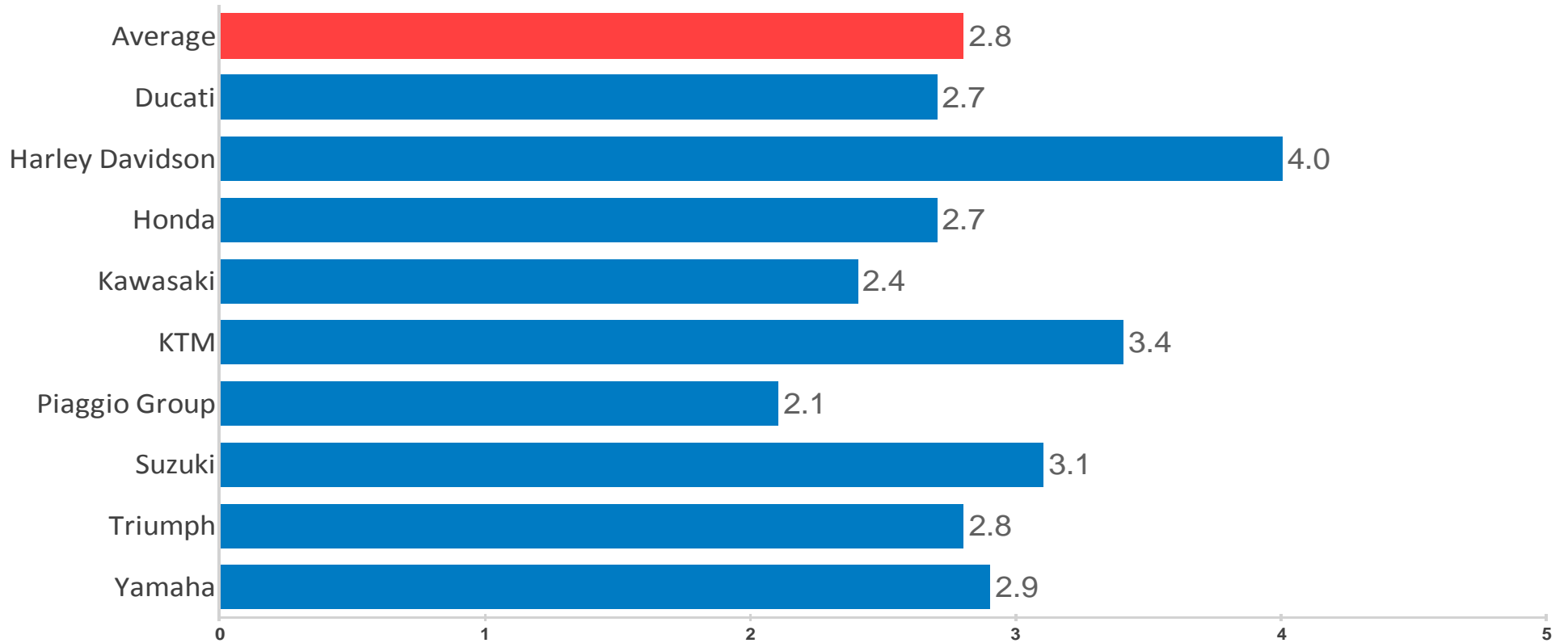


PREVIOUS SURVEY RESULTS – AUTUMN 2016

15a: The dealer standards expected by your manufacturer			
Ducati	2.3	Triumph	2.7
Harley Davidson	4.0	Yamaha	3.4
Honda	2.6		
Kawasaki	2.6		
KTM	3.7		
Piaggio Group	2.7		
Suzuki	3.3	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q15 b) How realistic do you feel your manufacturer's standards are compared with the return on investment/reward

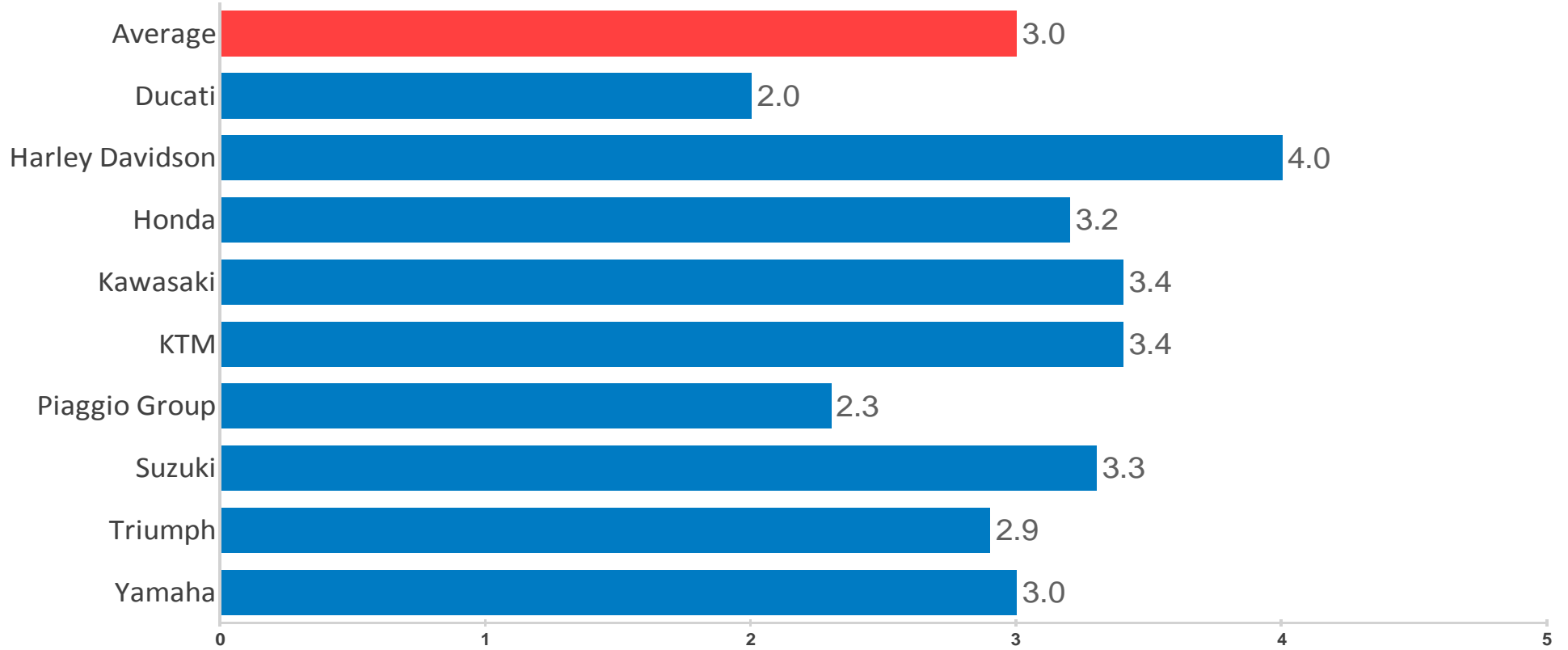


PREVIOUS SURVEY RESULTS – AUTUMN 2016

15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward			
Ducati	2.1	Triumph	2.6
Harley Davidson	4.2	Yamaha	3.1
Honda	2.5		
Kawasaki	2.4		
KTM	3.6		
Piaggio Group	2.8		
Suzuki	3.2	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q16 a) That the management of your manufacturer takes dealers views and opinions into account

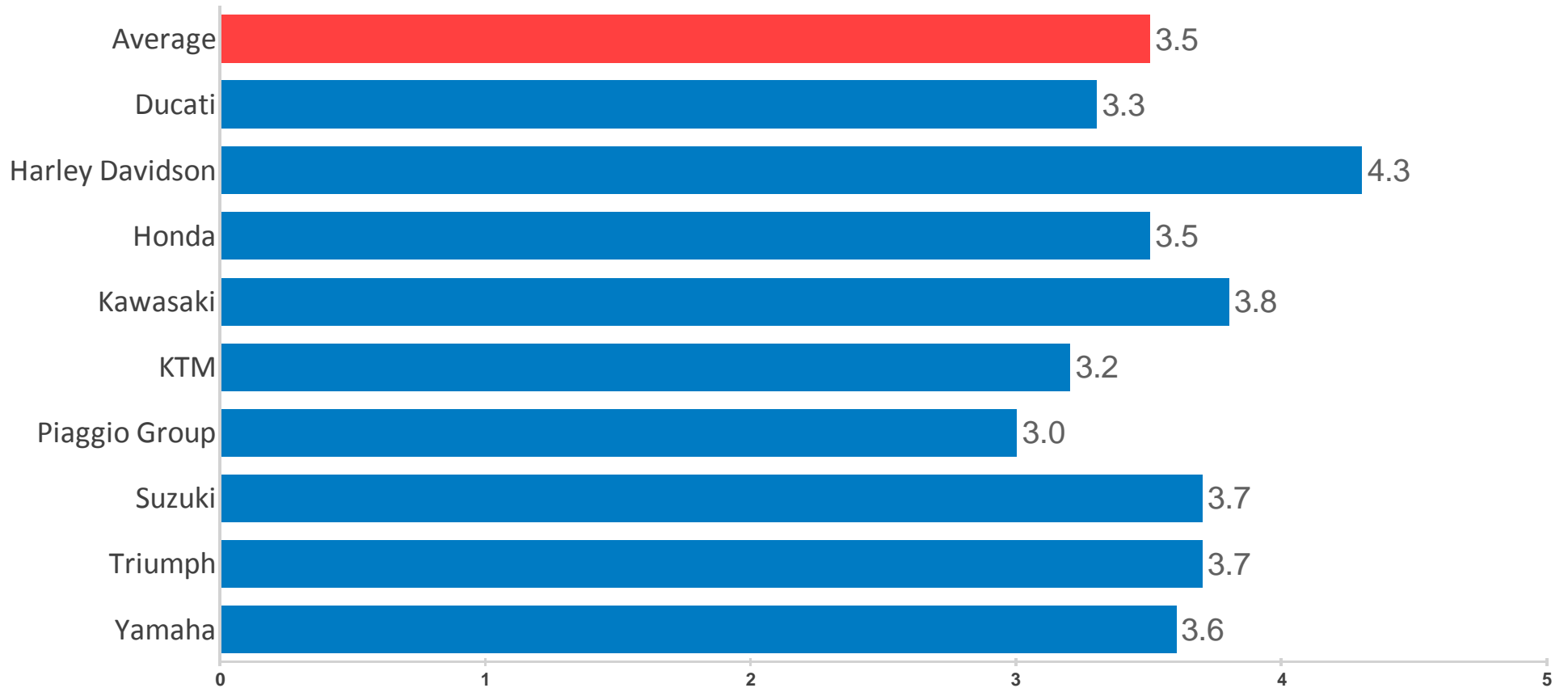


PREVIOUS SURVEY RESULTS – AUTUMN 2016

16a: That the management of your manufacturer takes dealers' views and opinions into account			
Ducati	2.0	Piaggio Group	2.6
Harley Davidson	4.6	Suzuki	3.1
Honda	3.2		
Kawasaki	3.1	Triumph	
KTM	3.1	Yamaha	
Piaggio Group	2.3		
Suzuki	3.1	AVERAGE	3.0

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Q16 b) The effectiveness of the field sales team

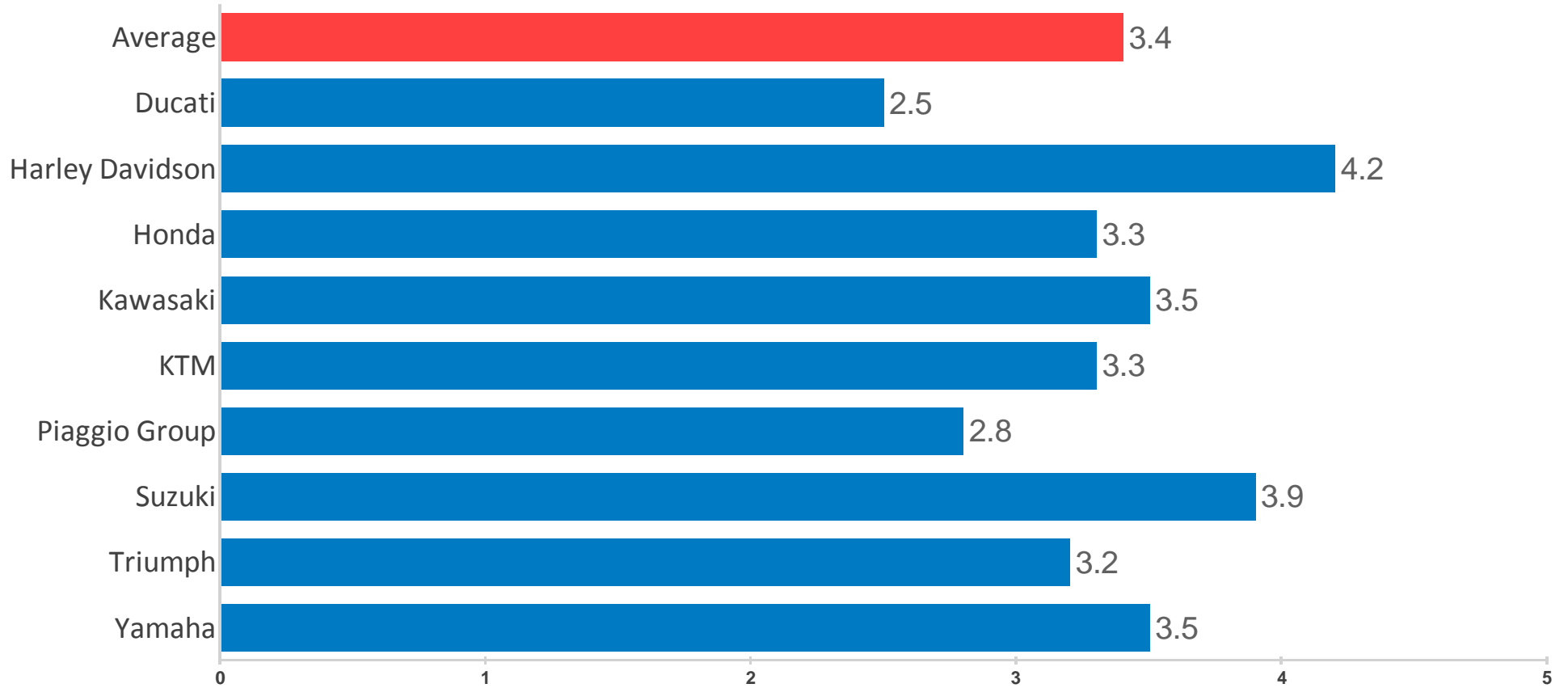


PREVIOUS SURVEY RESULTS – AUTUMN 2016

16b: The effectiveness of your field sales team			
Ducati	2.9	Triumph	4.0
Harley Davidson	4.6	Yamaha	3.5
Honda	3.6		
Kawasaki	3.6		
KTM	3.9		
Piaggio Group	3.4		
Suzuki	3.5	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q16 c) The effectiveness of the field service and parts staff

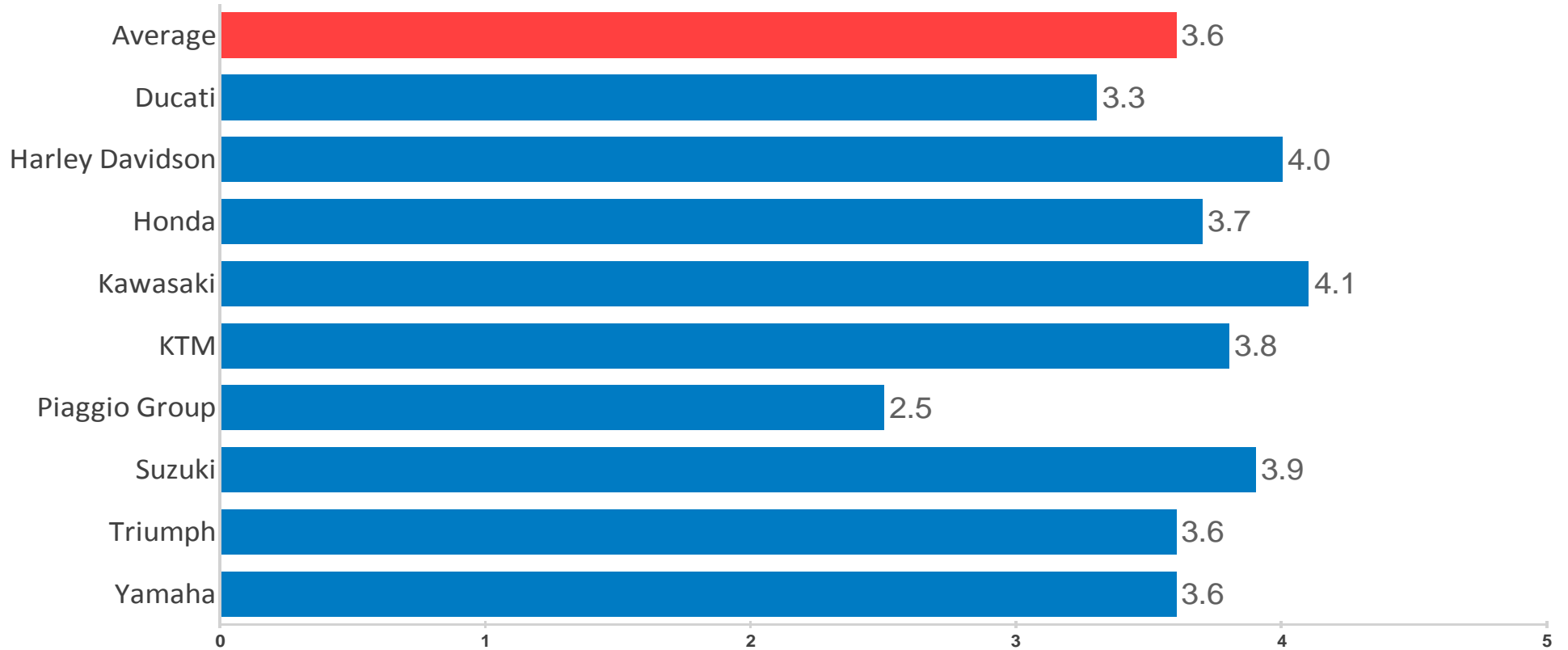


PREVIOUS SURVEY RESULTS – AUTUMN 2016

16c: The effectiveness of the field service and parts staff			
Ducati	2.2	Triumph	3.2
Harley Davidson	4.0	Yamaha	3.4
Honda	3.4		
Kawasaki	3.6		
KTM	4.0		
Piaggio Group	3.0		
Suzuki	3.7	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q16 d) The effectiveness of your manufacturer's retail finance programme



PREVIOUS SURVEY RESULTS – AUTUMN 2016

16d: The effectiveness of your manufacturer's retail finance programme			
Ducati	3.2	Triumph	4.0
Harley Davidson	4.2	Yamaha	3.9
Honda	3.9		
Kawasaki	3.6		
KTM	4.0		
Piaggio Group	2.7		
Suzuki	3.8	AVERAGE	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q16 e) The effectiveness of your dealer council and dealer forums (go to Q17a if not applicable)

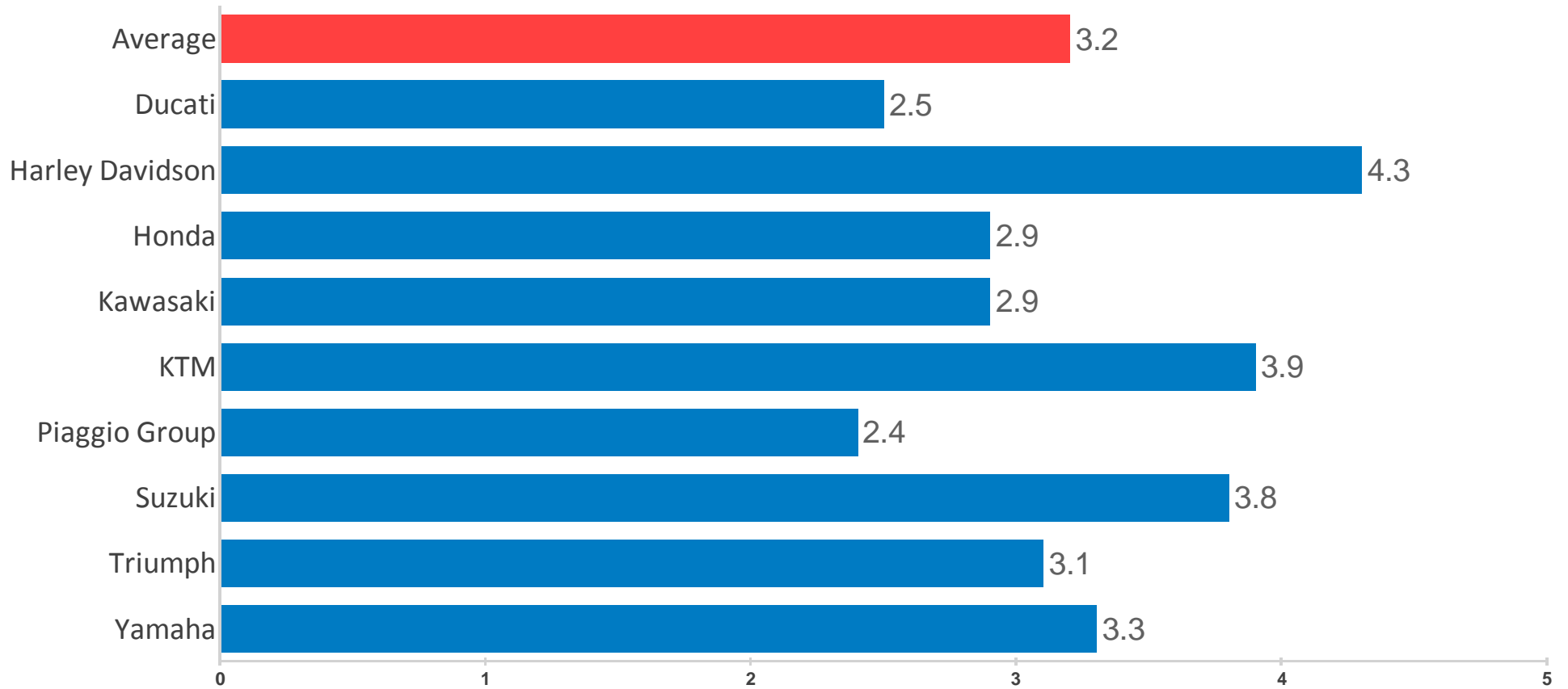


PREVIOUS SURVEY RESULTS – AUTUMN 2016

16e: The effectiveness of your dealer council and dealer forums			
Ducati	2.0	Triumph	2.9
Harley Davidson	3.6	Yamaha	2.6
Honda	3.6		
Kawasaki	2.9		
KTM	3.0		
Piaggio Group	1.7		
Suzuki	2.7	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q17 a) The routine procedures and controls expected

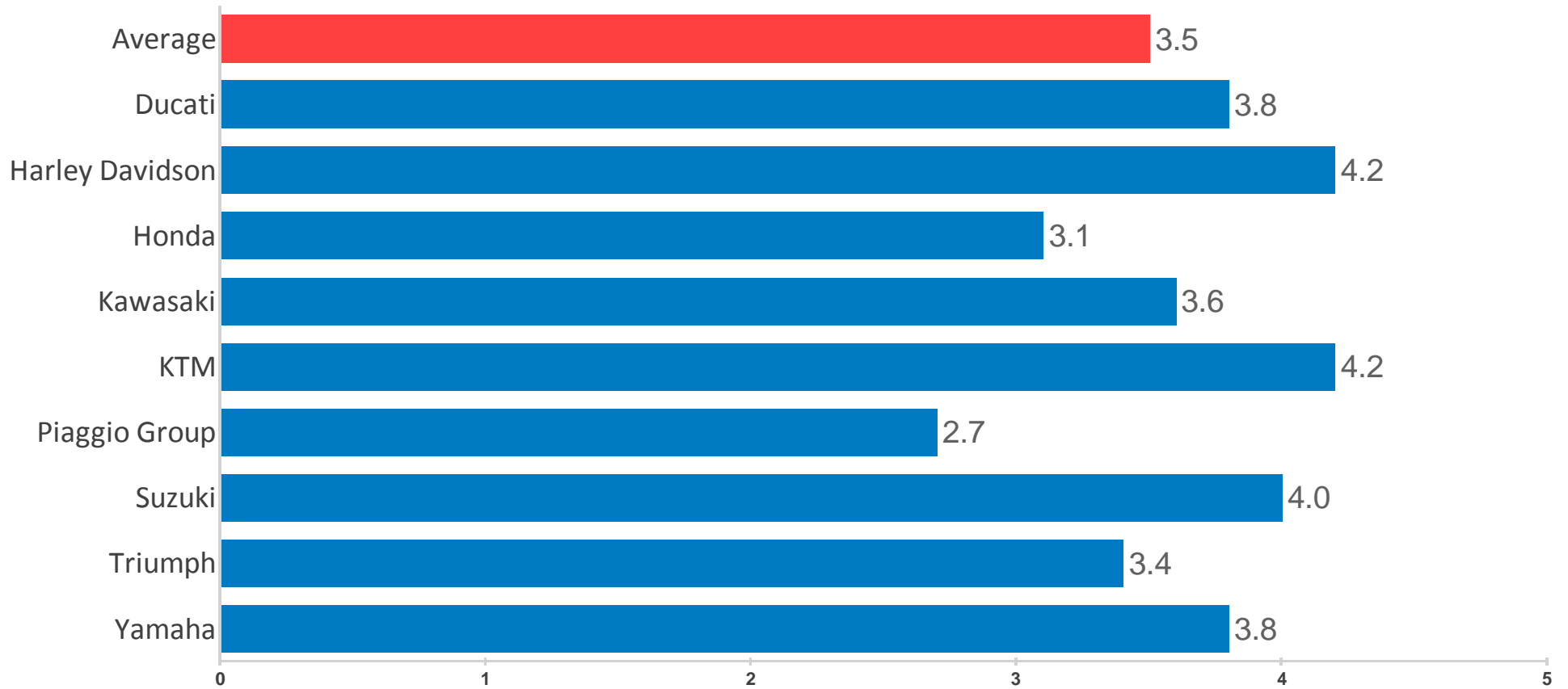


PREVIOUS SURVEY RESULTS – AUTUMN 2016

17a: The routine procedures and controls expected			
Ducati	2.2	Triumph	3.4
Harley Davidson	4.0	Yamaha	3.7
Honda	2.7		
Kawasaki	3.3		
KTM	3.4		
Piaggio Group	2.8		
Suzuki	3.2	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q17 b) The quality of your manufacturer's training

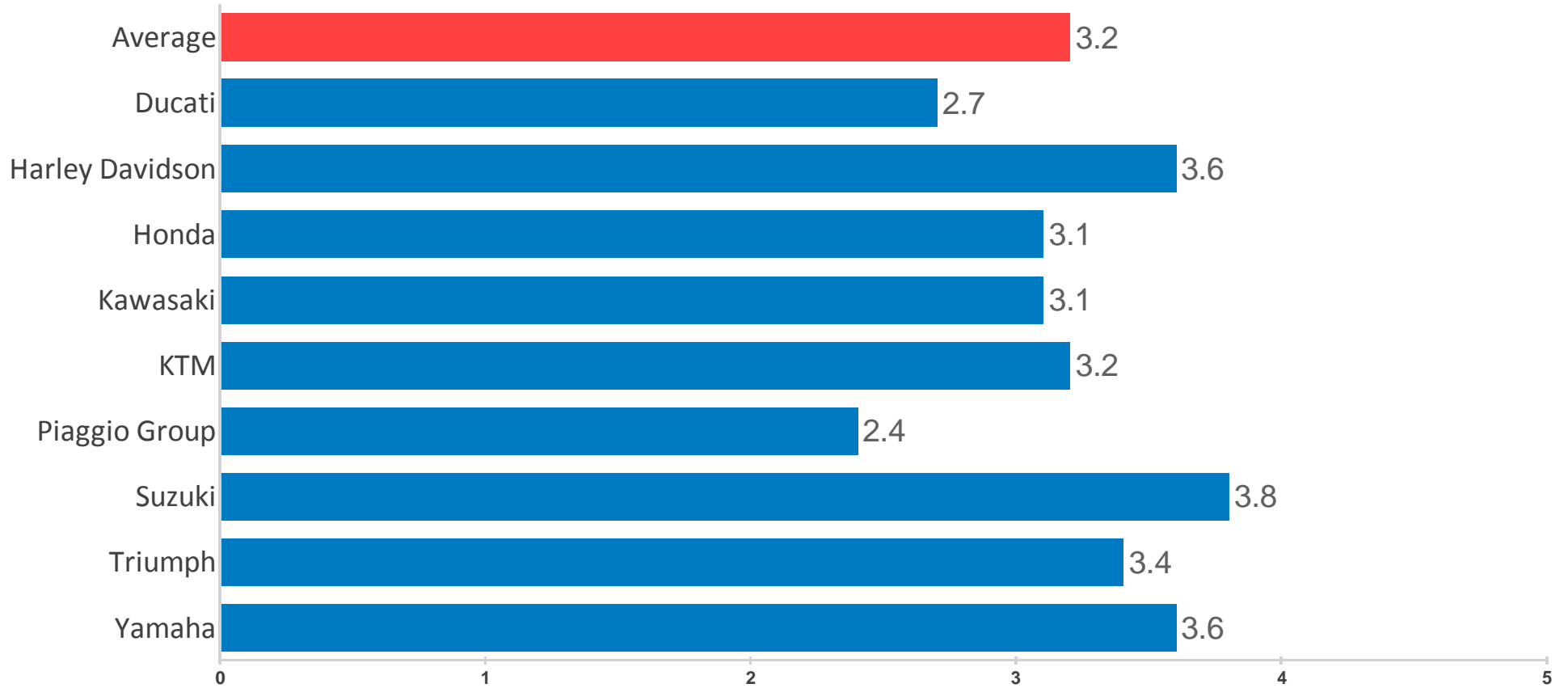


PREVIOUS SURVEY RESULTS – AUTUMN 2016

17b: The quality of your manufacturer's training			
Ducati	2.4	Triumph	3.8
Harley Davidson	4.8	Yamaha	3.9
Honda	3.4		
Kawasaki	3.9		
KTM	3.7		
Piaggio Group	2.5		
Suzuki	3.3	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q17 c) The cost of your manufacturer's training

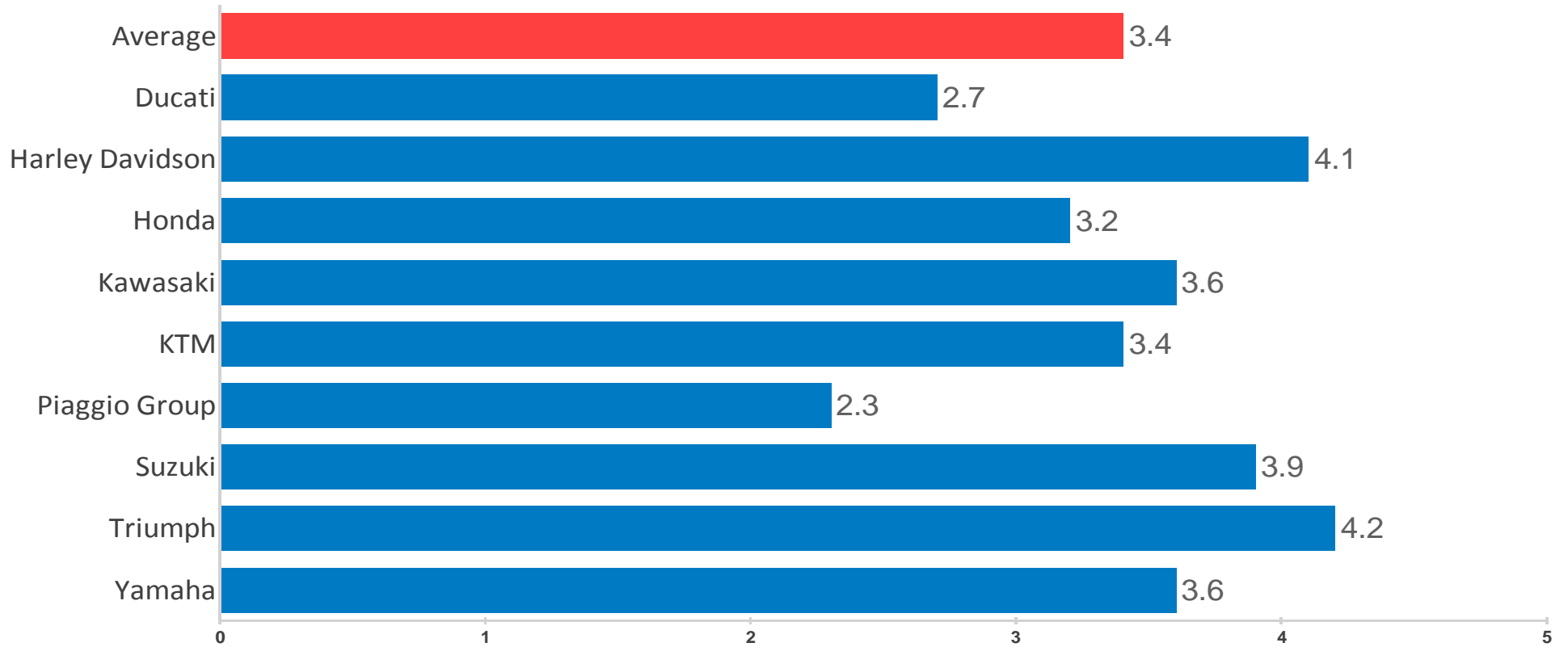


PREVIOUS SURVEY RESULTS – AUTUMN 2016

17c: The cost of your manufacturer's training			
Ducati	2.0	Triumph	3.7
Harley Davidson	3.4	Yamaha	3.8
Honda	3.3		
Kawasaki	3.1		
KTM	3.3		
Piaggio Group	2.5		
Suzuki	3.6	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q17 d) Your ability to do business easily with your manufacturer on a day-to-day basis

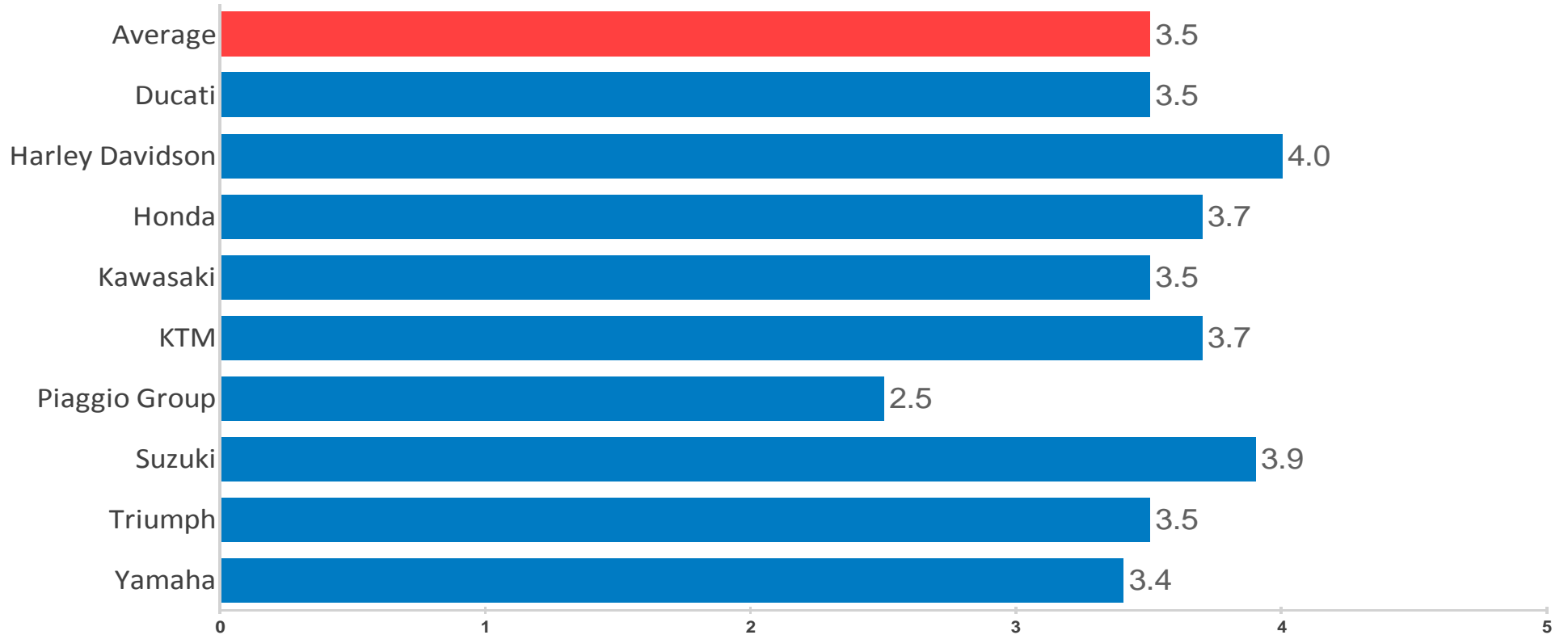


PREVIOUS SURVEY RESULTS – AUTUMN 2016

17d: Your ability to do business with your manufacturer on a day-to-day basis			
Ducati	2.4	Triumph	3.9
Harley Davidson	4.6	Yamaha	3.8
Honda	3.1		
Kawasaki	3.9		
KTM	3.7		
Piaggio Group	2.5		
Suzuki	3.1	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q17 e) The support and assistance provided by your manufacturer to enable you to follow a professional sales process

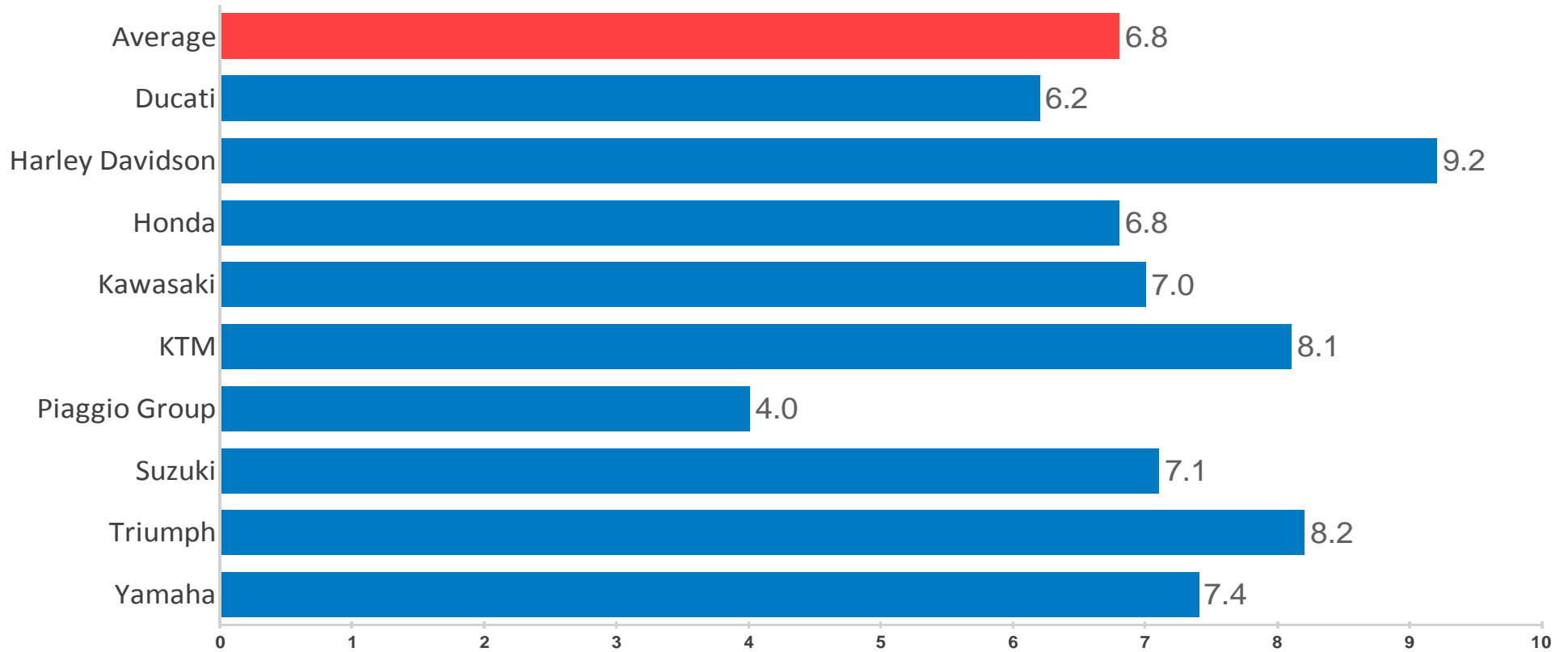


PREVIOUS SURVEY RESULTS – AUTUMN 2016

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process			
Ducati	2.8	Triumph	3.7
Harley Davidson	4.6	Yamaha	3.6
Honda	3.5		
Kawasaki	3.7		
KTM	3.4		
Piaggio Group	2.2		
Suzuki	3.4	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

Q18 Overall, how do you rate the value of holding your motorcycle franchise?



PREVIOUS SURVEY RESULTS – AUTUMN 2016

18: Overall, how do you rate the value of holding your motorcycle franchise			
Ducati	5.7	Triumph	8.0
Harley Davidson	9.6	Yamaha	7.9
Honda	6.6		
Kawasaki	6.6		
KTM	8.3		
Piaggio Group	4.8		
Suzuki	5.6	AVERAGE	6.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

6a: The product's price and value against other brands				6b: How realistic is your target and performance related bonus in terms of achievement			
Harley Davidson	4.3	Ducati	3.3	Harley Davidson	3.7	Ducati	2.5
Triumph	4.0	Piaggio Group	2.1	KTM	3.5	Piaggio Group	2.3
Kawasaki	3.9			Yamaha	3.5		
Yamaha	3.9			Kawasaki	3.4		
Suzuki	3.7			Suzuki	3.3		
Honda	3.6			Triumph	3.2		
KTM	3.6	Average	3.5	Honda	2.8	Average	3.0

7a: Your manufacturer's policy for the supply and stocking of motorcycles				7b: The new motorcycle target negotiating process			
Harley Davidson	3.9	Yamaha	2.6	Ducati	3.7	Piaggio Group	2.3
KTM	3.8	Piaggio Group	2.2	Harley Davidson	3.7	Honda	2.1
Kawasaki	3.4			Suzuki	3.4		
Triumph	3.4			KTM	3.2		
Ducati	3.2			Yamaha	3.0		
Honda	3.0			Kawasaki	2.8		
Suzuki	3.0	Average	3.0	Triumph	2.7	Average	2.8

7c: What is your annual target for this brand				8a: The brand image			
Honda	324.9	Ducati	103.0	Harley Davidson	4.8	Suzuki	3.9
Harley Davidson	200.6	Suzuki	95.7	Triumph	4.7	Piaggio Group	3.0
KTM	198.8			Ducati	4.3		
Triumph	168.4			KTM	4.3		
Yamaha	141.3			Yamaha	4.2		
Kawasaki	136.5			Honda	4.1		
Piaggio Group	131.2	Average	182.5	Kawasaki	4.1	Average	4.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

8b: The product image				8c: Frequency of introduction of new models			
Harley Davidson	4.7	Suzuki	3.9	Ducati	4.7	Suzuki	3.0
Triumph	4.5	Piaggio Group	3.1	Triumph	4.7	Piaggio Group	2.5
Ducati	4.3			Harley Davidson	4.4		
Kawasaki	4.3			Kawasaki	4.3		
KTM	4.3			Yamaha	4.1		
Honda	4.2			KTM	4.0		
Yamaha	4.2	Average	4.0	Honda	3.8	Average	3.7

8d: Retail sales incentives and promotions				8e: Product advertising			
Harley Davidson	3.9	Yamaha	3.2	Harley Davidson	3.9	Honda	3.2
Kawasaki	3.9	Piaggio Group	2.2	Ducati	3.8	Piaggio Group	1.9
Triumph	3.7			KTM	3.7		
Suzuki	3.6			Suzuki	3.7		
Ducati	3.3			Triumph	3.7		
Honda	3.3			Kawasaki	3.6		
KTM	3.3	Average	3.3	Yamaha	3.4	Average	3.3

8f: Have a comprehensive accessory offering that appeals to customers				8g: Have a comprehensive clothing offering that appeals to customers			
Harley Davidson	4.7	Piaggio Group	2.7	Harley Davidson	4.6	Piaggio Group	2.2
Ducati	4.2	Honda	2.1	KTM	3.8	Honda	2.0
KTM	4.1			Suzuki	3.7		
Triumph	4.0			Ducati	3.3		
Yamaha	4.0			Yamaha	3.3		
Suzuki	3.7			Triumph	3.2		
Kawasaki	3.3	Average	3.3	Kawasaki	2.6	Average	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

9: Your manufacturer's warranty policy				10: What is your labour rate for retail before VAT (£)			
KTM	4.0	Piaggio Group	2.5	Harley Davidson	80.6	Suzuki	51.3
Honda	3.9	Ducati	2.3	Ducati	62.5	KTM	50.4
Yamaha	3.8			Triumph	61.6		
Triumph	3.7			Piaggio Group	57.3		
Suzuki	3.6			Honda	55.8		
Harley Davidson	3.4			Kawasaki	55.3		
Kawasaki	3.3	Average	3.5	Yamaha	53.7	Average	56.7

11: What is your labour rate for warranty before VAT (£)				12a: Warranty labour rate			
Harley Davidson	78.5	Yamaha	37.9	Harley Davidson	4.0	Yamaha	2.4
Triumph	53.1	Suzuki	37.1	Kawasaki	3.8	Piaggio Group	2.3
Kawasaki	52.1			Triumph	3.6		
Ducati	48.3			KTM	3.2		
Honda	45.0			Suzuki	3.2		
KTM	39.4			Honda	3.1		
Piaggio Group	39.0	Average	44.7	Ducati	2.8	Average	3.0

12b: Warranty replacement parts policy				12c: Warranty time allowances			
Kawasaki	3.1	Triumph	2.0	Yamaha	4.0	Triumph	3.4
Harley Davidson	3.0	Piaggio Group	1.9	KTM	3.9	Piaggio Group	2.8
Suzuki	3.0			Suzuki	3.7		
KTM	2.9			Kawasaki	3.6		
Honda	2.6			Ducati	3.5		
Yamaha	2.4			Harley Davidson	3.4		
Ducati	2.0	Average	2.5	Honda	3.4	Average	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

12d: Timely and fair settlement of warranty claims				12e: Quality and availability of technical support			
Kawasaki	4.3	Ducati	3.2	Kawasaki	4.3	Piaggio Group	2.6
Suzuki	4.0	Piaggio Group	2.2	Suzuki	4.0	Ducati	2.5
Yamaha	4.0			KTM	3.7		
Harley Davidson	3.7			Yamaha	3.6		
Honda	3.7			Honda	3.4		
KTM	3.7			Harley Davidson	3.2		
Triumph	3.7	Average	3.6	Triumph	2.9	Average	3.4

13: The profit return by representing your franchise				14a: The future profitability of your business			
Triumph	3.8	Ducati	2.8	Harley Davidson	4.0	Ducati	2.8
Harley Davidson	3.7	Piaggio Group	2.3	KTM	3.9	Piaggio Group	2.6
KTM	3.7			Triumph	3.8		
Kawasaki	3.3			Honda	3.6		
Yamaha	3.3			Kawasaki	3.5		
Honda	3.2			Yamaha	3.5		
Suzuki	3.2	Average	3.2	Suzuki	3.4	Average	3.4

14b: Your stocking plan for this franchise				15a: The dealer standards expected by your manufacturer			
Harley Davidson	4.2	Yamaha	3.1	Harley Davidson	4.0	Kawasaki	2.3
KTM	4.0	Piaggio Group	2.7	Suzuki	3.5	Piaggio Group	2.2
Ducati	3.8			KTM	3.4		
Kawasaki	3.6			Yamaha	3.0		
Honda	3.5			Triumph	2.9		
Suzuki	3.4			Ducati	2.8		
Triumph	3.4	Average	3.4	Honda	2.7	Average	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward				16a: That the management of your manufacturer takes dealers' views and opinions into account			
Harley Davidson	4.0	Kawasaki	2.4	Harley Davidson	4.0	Piaggio Group	2.3
KTM	3.4	Piaggio Group	2.1	Kawasaki	3.4	Ducati	2.0
Suzuki	3.1			KTM	3.4		
Yamaha	2.9			Suzuki	3.3		
Triumph	2.8			Honda	3.2		
Ducati	2.7			Yamaha	3.0		
Honda	2.7	Average	2.8	Triumph	2.9	Average	3.0

16b: The effectiveness of your field sales team				16c: The effectiveness of the field service and parts staff			
Harley Davidson	4.3	KTM	3.2	Harley Davidson	4.2	Piaggio Group	2.8
Kawasaki	3.8	Piaggio Group	3.0	Suzuki	3.9	Ducati	2.5
Suzuki	3.7			Kawasaki	3.5		
Triumph	3.7			Yamaha	3.5		
Yamaha	3.6			Honda	3.3		
Honda	3.5			KTM	3.3		
Ducati	3.3	Average	3.5	Triumph	3.2	Average	3.4

16d: The effectiveness of your manufacturer's retail finance programme				16e: The effectiveness of your dealer council and dealer forums			
Kawasaki	4.1	Ducati	3.3	Honda	3.5	Piaggio Group	2.1
Harley Davidson	4.0	Piaggio Group	2.5	Suzuki	3.4	Triumph	2.1
Suzuki	3.9			Harley Davidson	3.2		
KTM	3.8			KTM	3.2		
Honda	3.7			Kawasaki	2.7		
Triumph	3.6			Yamaha	2.7		
Yamaha	3.6	Average	3.6	Ducati	2.3	Average	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2017 SURVEY

17a: The routine procedures and controls expected				17b: The quality of your manufacturer's training			
Harley Davidson	4.3	Ducati	2.5	Harley Davidson	4.2	Honda	3.1
KTM	3.9	Piaggio Group	2.4	KTM	4.2	Piaggio Group	2.7
Suzuki	3.8			Suzuki	4.0		
Yamaha	3.3			Ducati	3.8		
Triumph	3.1			Yamaha	3.8		
Honda	2.9			Kawasaki	3.6		
Kawasaki	2.9	Average	3.2	Triumph	3.4	Average	3.5

17c: The cost of your manufacturer's training				17d: Your ability to do business with your manufacturer on a day-to-day basis			
Suzuki	3.8	Ducati	2.7	Triumph	4.2	Ducati	2.7
Harley Davidson	3.6	Piaggio Group	2.4	Harley Davidson	4.1	Piaggio Group	2.3
Yamaha	3.6			Suzuki	3.9		
Triumph	3.4			Kawasaki	3.6		
KTM	3.2			Yamaha	3.6		
Honda	3.1			KTM	3.4		
Kawasaki	3.1	Average	3.2	Honda	3.2	Average	3.4

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process				18: Overall, how do you rate the value of holding your motorcycle franchise			
Harley Davidson	4.0	Yamaha	3.4	Harley Davidson	9.2	Ducati	6.2
Suzuki	3.9	Piaggio Group	2.5	Triumph	8.2	Piaggio Group	4.0
Honda	3.7			KTM	8.1		
KTM	3.7			Yamaha	7.4		
Ducati	3.5			Suzuki	7.1		
Kawasaki	3.5			Kawasaki	7.0		
Triumph	3.5	Average	3.5	Honda	6.8	Average	6.8