

**NMDA**

**NATIONAL MOTORCYCLE DEALERS ASSOCIATION**

**NATIONAL MOTORCYCLE DEALERS ASSOCIATION**

**DEALER ATTITUDE SURVEY RESULTS**

## DEALER ATTITUDE SURVEY AUTUMN 2021

We are pleased to reveal the findings of the latest Motorcycle Dealer Attitude Survey conducted in October 2021 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 twice a year and examines how dealers view the major issues currently affecting them, whilst 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.

Dealers were asked to respond to questions covering significant aspects of their business relationship with their motorcycle manufacturer. From these responses scores, the majority of results have been produced on a simple five-point scale, ranging from 1 - very dissatisfied/very poor to 5 - very satisfied/very good.

**NB:**

**National Motorcycle Dealers Association**

**Paddy O'Connell – Head of Association**

**TEL: 07436 404102 Email: Patrick.oconnell@rmif.co.uk**



**BMW  
MOTORRAD**

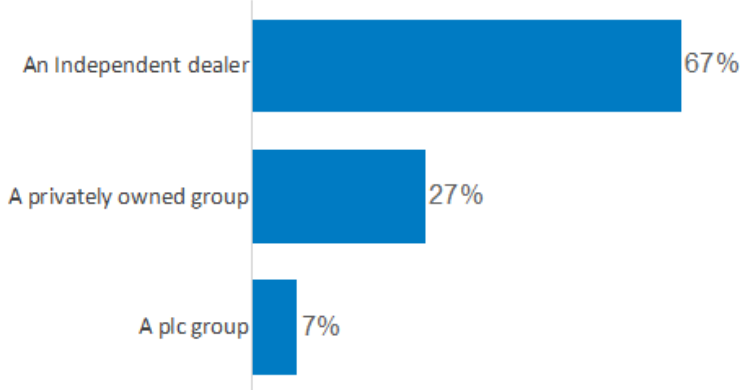


**BREAKDOWN OF RESPONSES**

FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
BMW	8	45	8
HARLEY DAVIDSON	8	29	28
HONDA	33	72	46
KAWASAKI	7	60	12
KTM	7	45	16
PIAGGIO GROUP	12	53	23
SUZUKI	11	87	13
TRIUMPH	18	48	38
YAMAHA	23	93	25
<b>TOTAL</b>	<b>127</b>	<b>532</b>	<b>24</b>

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

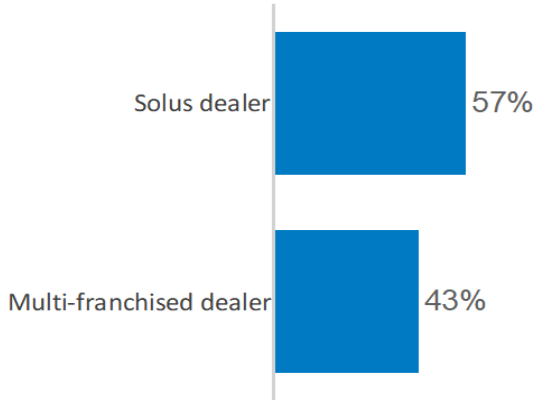
Q2 In this site are you:



**Spring 2021 SURVEY RESULTS**

<b>INDEPENDENT</b>	<b>69%</b>
<b>PRIVATELY OWNED</b>	<b>30%</b>
<b>PLC GROUP</b>	<b>1%</b>

Q3 Is this site:

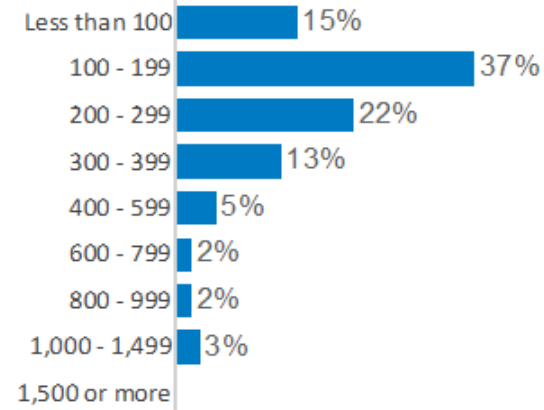


**Spring 2021 SURVEY RESULTS**

<b>SOLUS</b>	<b>67%</b>
<b>MULTI-FRANCHISED</b>	<b>33%</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

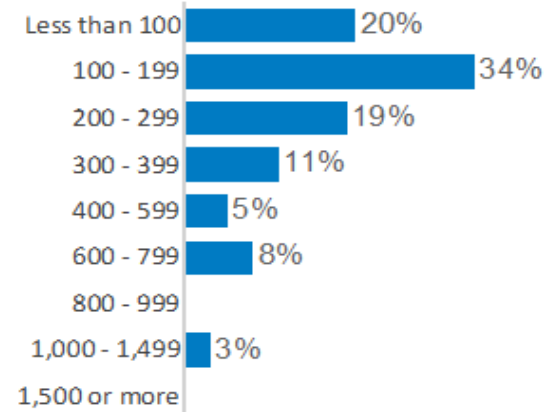
Q4 How many new motorcycles do you sell per annum?



### Spring 2021 SURVEY RESULTS

Less than 100	20%	400-599	6%
100-199	33%	600-799	5%
200-299	20%	800-999	7%
300-399	7%	1000-1499	2%
1500 or more	1%		

Q5 How many used motorcycles do you sell per annum?

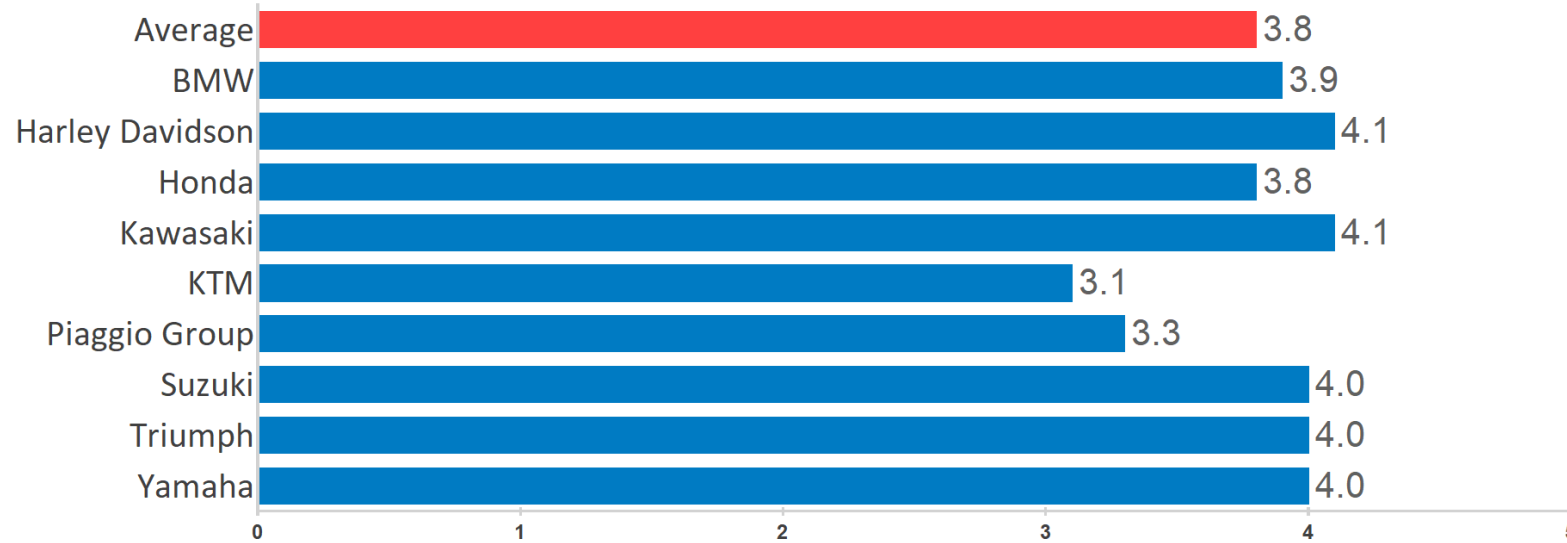


### Spring 2021 SURVEY RESULTS

Less than 100	27%	400-599	9%
100-199	28%	600-799	8%
200-299	19%	800-999	3%
300-399	6%	1000-1499	1%
1500 or more	0%		

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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

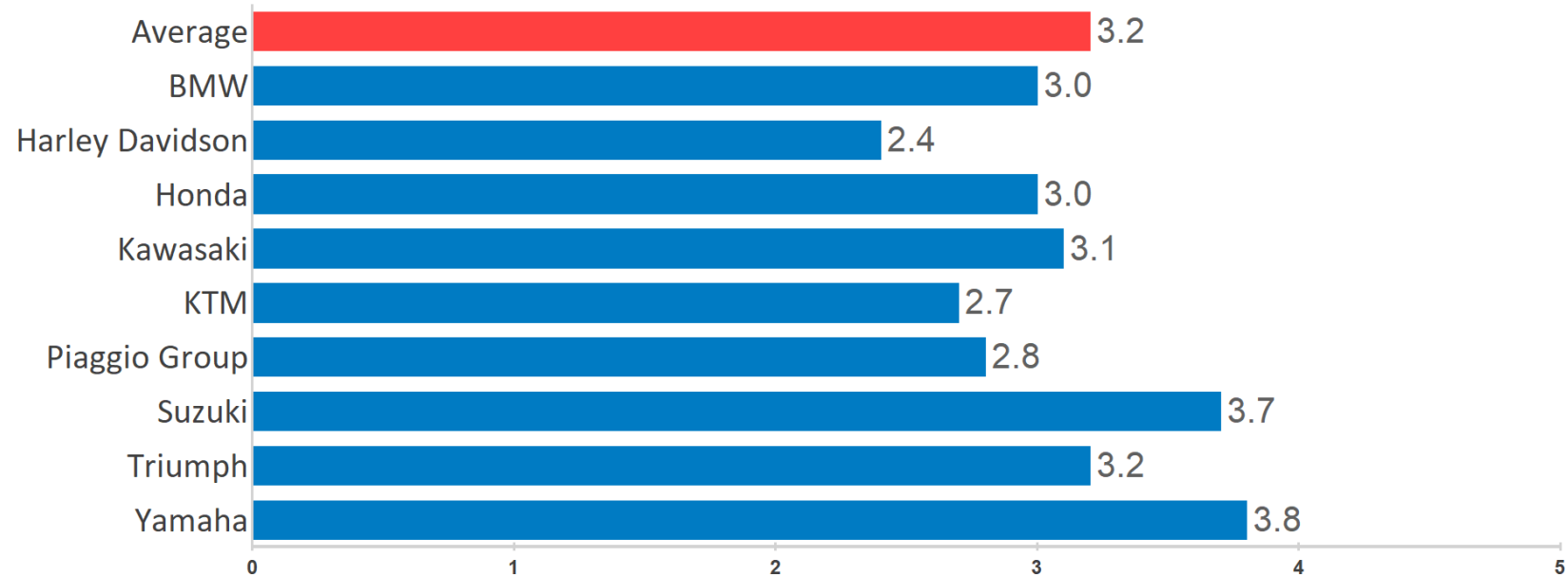


## PREVIOUS SURVEY RESULTS – SPRING 2021

Q6a: The product's price and value against other brands			
BMW	3.6	Lexmoto	4.7
Ducati	4.7	Royal Enfield	5.0
Harley Davidson	3.6	Suzuki	3.5
Honda	3.3	Triumph	4.3
Kawasaki	4.0	Yamaha	3.0
KTM	3.5		
Piaggio Group	2.5	<b>AVERAGE</b>	<b>3.7</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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

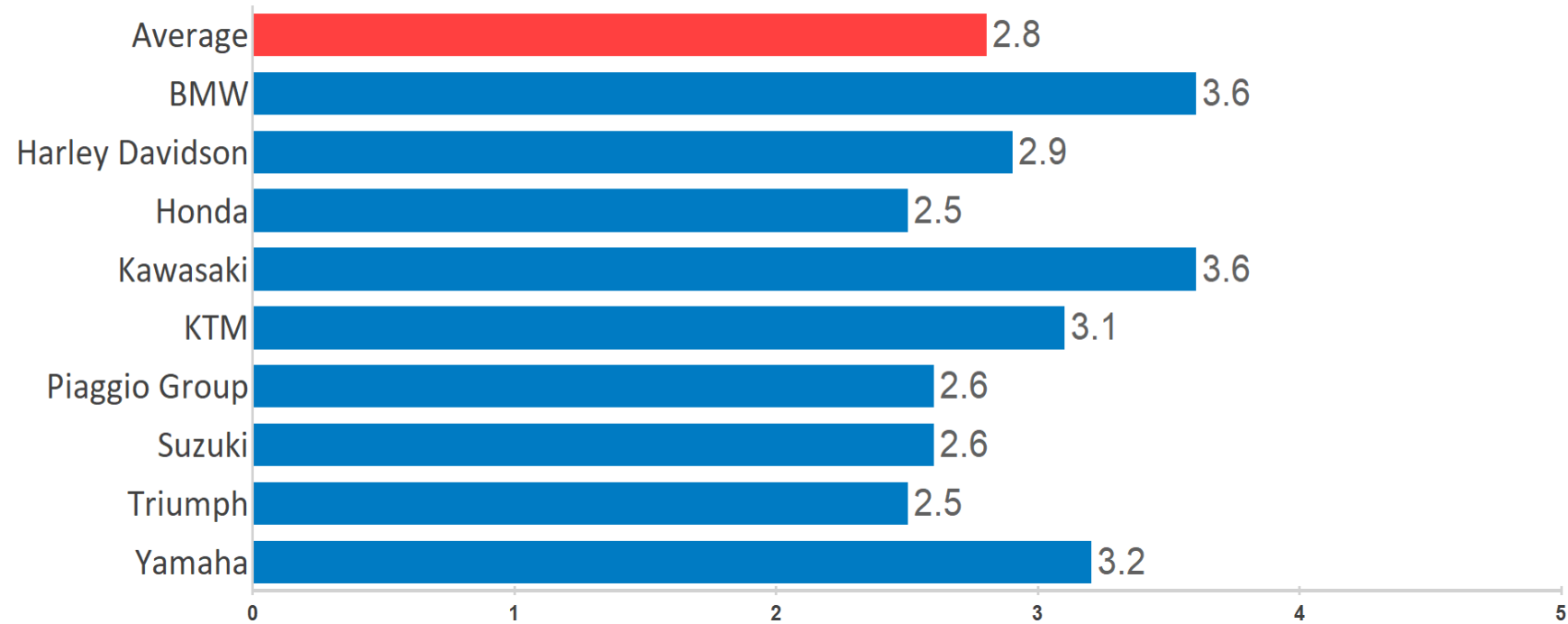


## PREVIOUS SURVEY RESULTS – SPRING 2021

Q6b: How realistic is your target and performance related bonus in terms of achievement			
BMW	2.6	Lexmoto	3.9
Ducati	4.3	Royal Enfield	4.0
Harley Davidson	3.3	Suzuki	3.1
Honda	2.3	Triumph	3.5
Kawasaki	2.9	Yamaha	3.0
KTM	2.7		
Piaggio Group	2.6	<b>AVERAGE</b>	<b>3.0</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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



## PREVIOUS SURVEY RESULTS – SPRING 2021

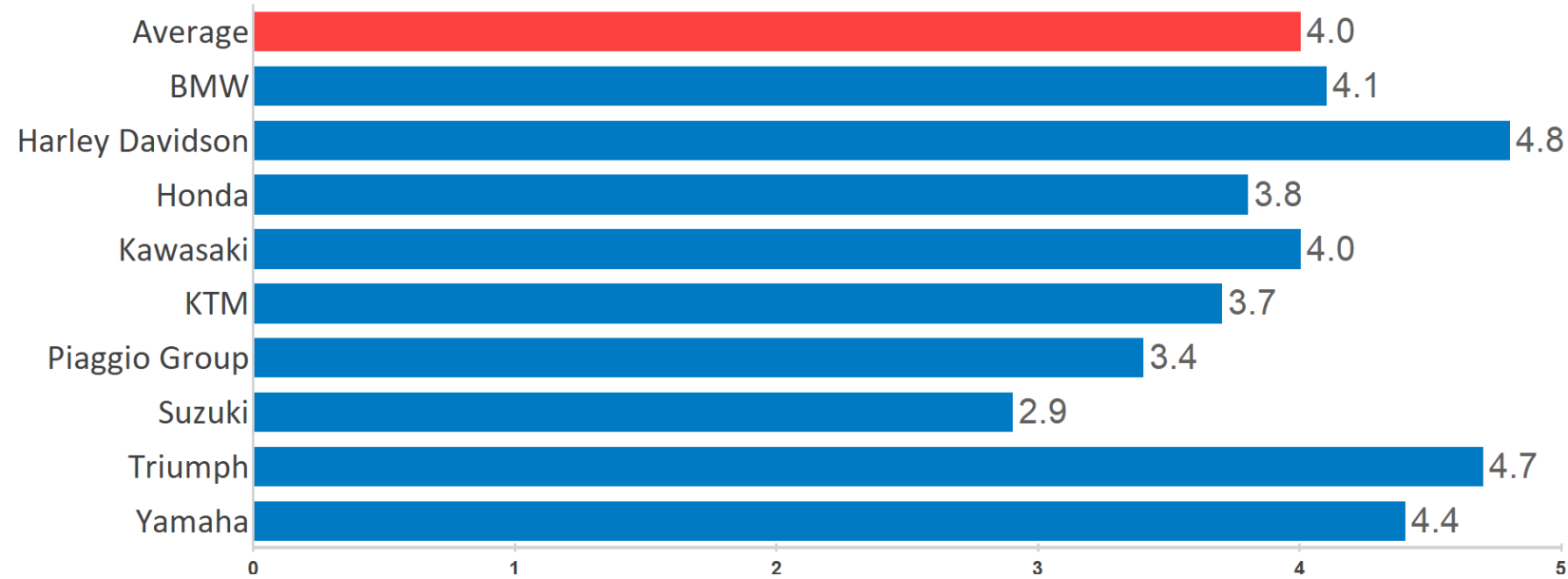
### Q7a: The fairness of your manufacturer's policy for the supply and stocking of motorcycles

BMW	3.3	Lexmoto	3.8
Ducati	4.4	Royal Enfield	4.3
Harley Davidson	3.0	Suzuki	2.6
Honda	2.4	Triumph	2.9
Kawasaki	3.3	Yamaha	3
KTM	2.5		
Piaggio Group	2.1	<b>AVERAGE</b>	<b>2.9</b>



## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

Q8 a) The brand image

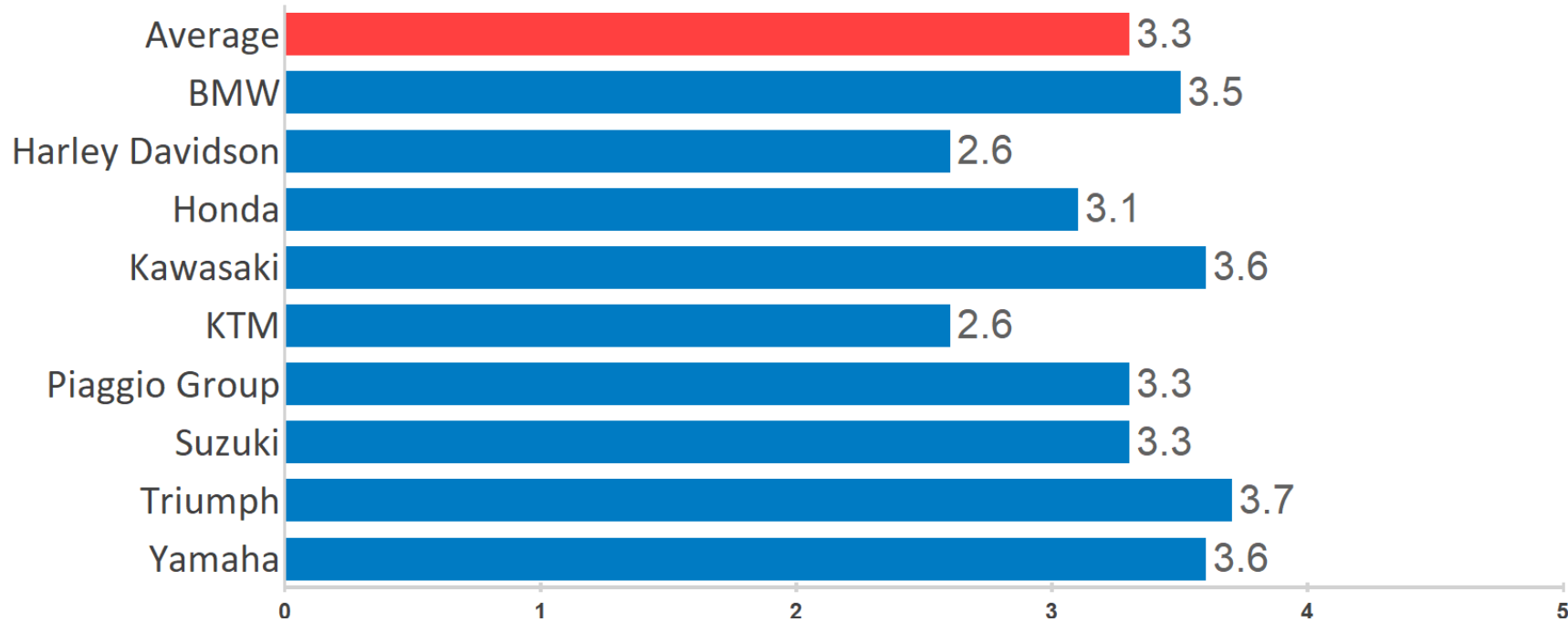


## PREVIOUS SURVEY RESULTS – SPRING 2021

Q8a: The brand image			
BMW	4.5	Lexmoto	4.1
Ducati	5.0	Royal Enfield	4.3
Harley Davidson	4.3	Suzuki	3.1
Honda	3.7	Triumph	4.6
Kawasaki	4.3	Yamaha	4
KTM	4.1		
Piaggio Group	3.3	<b>AVERAGE</b>	<b>4.0</b>

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

Q8 c) Retail sales incentives and promotions

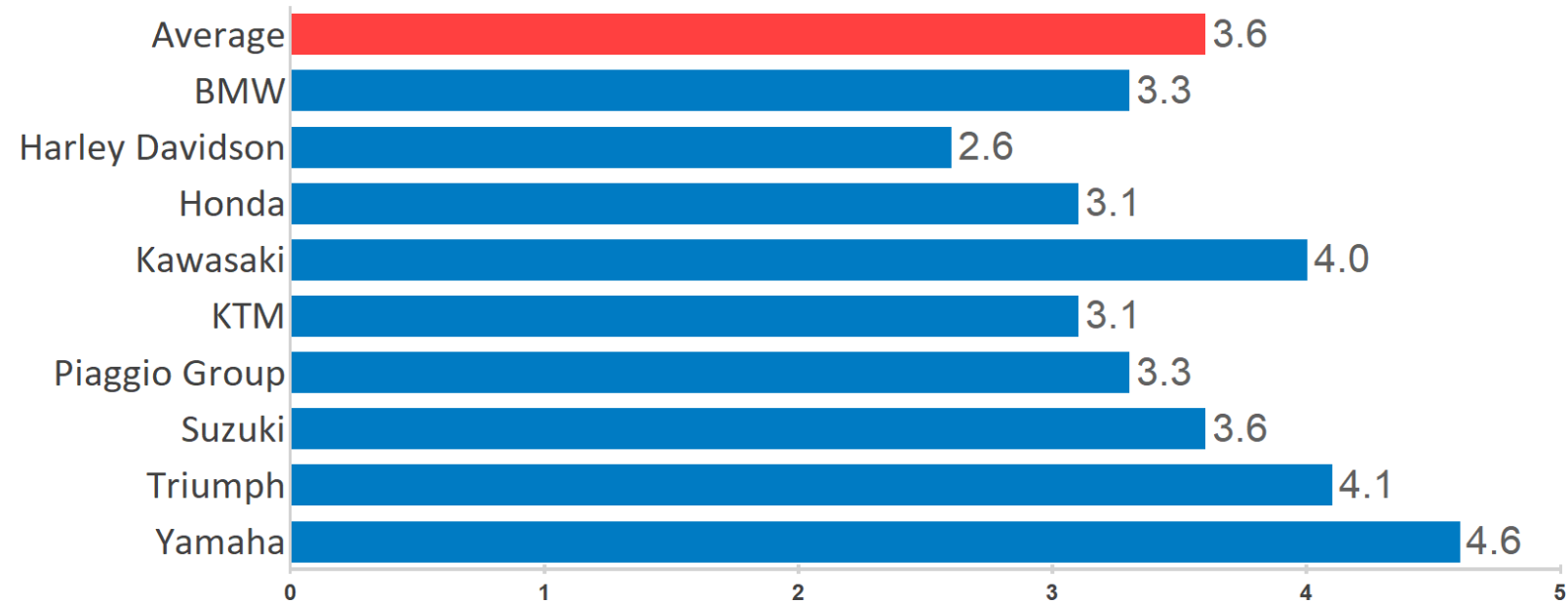


PREVIOUS SURVEY RESULTS – SPRING 2021

Q8c: Retail sales incentives and promotions			
BMW	3.5	Lexmoto	3.7
Ducati	4.6	Royal Enfield	4.0
Harley Davidson	2.3	Suzuki	3.3
Honda	2.8	Triumph	3.9
Kawasaki	3.6	Yamaha	3
KTM	3.5		
Piaggio Group	1.9	<b>AVERAGE</b>	<b>3.2</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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

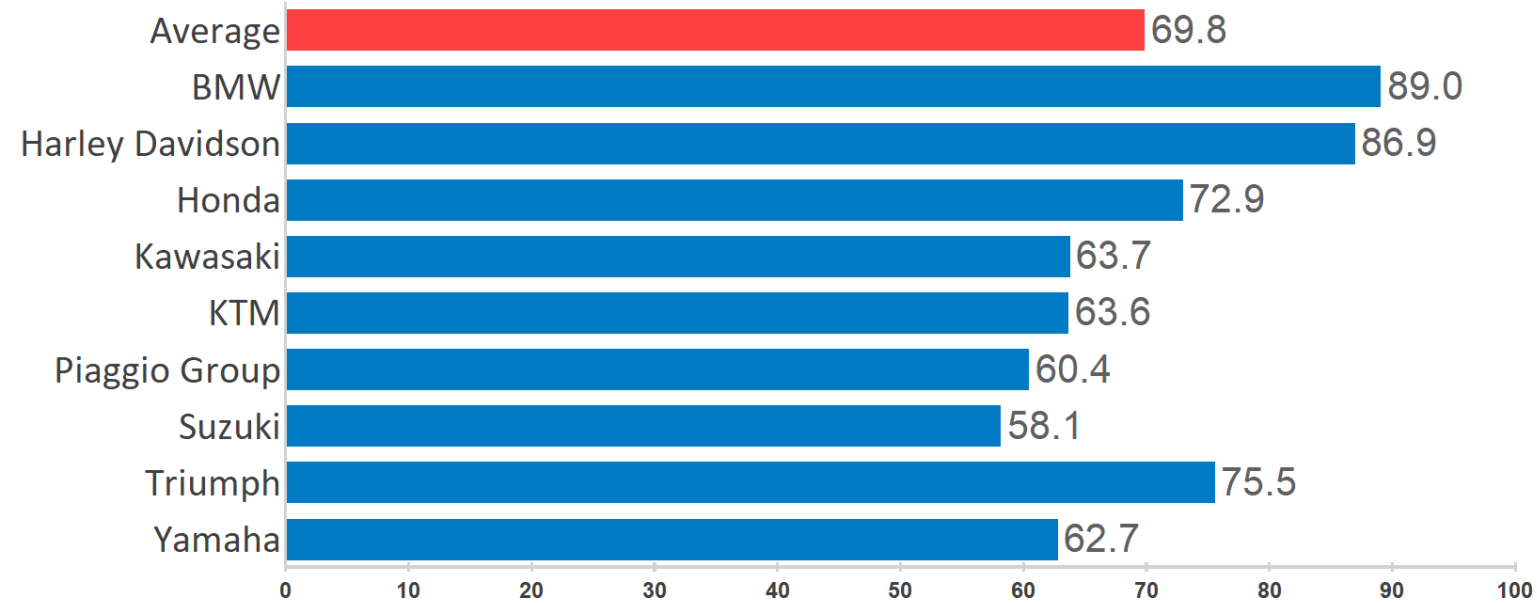


## PREVIOUS SURVEY RESULTS – SPRING 2021

Q9: Satisfaction with your manufacturer's warranty			
BMW	4.2	Lexmoto	3.8
Ducati	4.7	Royal Enfield	4.3
Harley Davidson	3.3	Suzuki	3.4
Honda	3.2	Triumph	3.7
Kawasaki	4.0	Yamaha	4.0
KTM	3.1		
Piaggio Group	2.9	<b>AVERAGE</b>	<b>3.7</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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

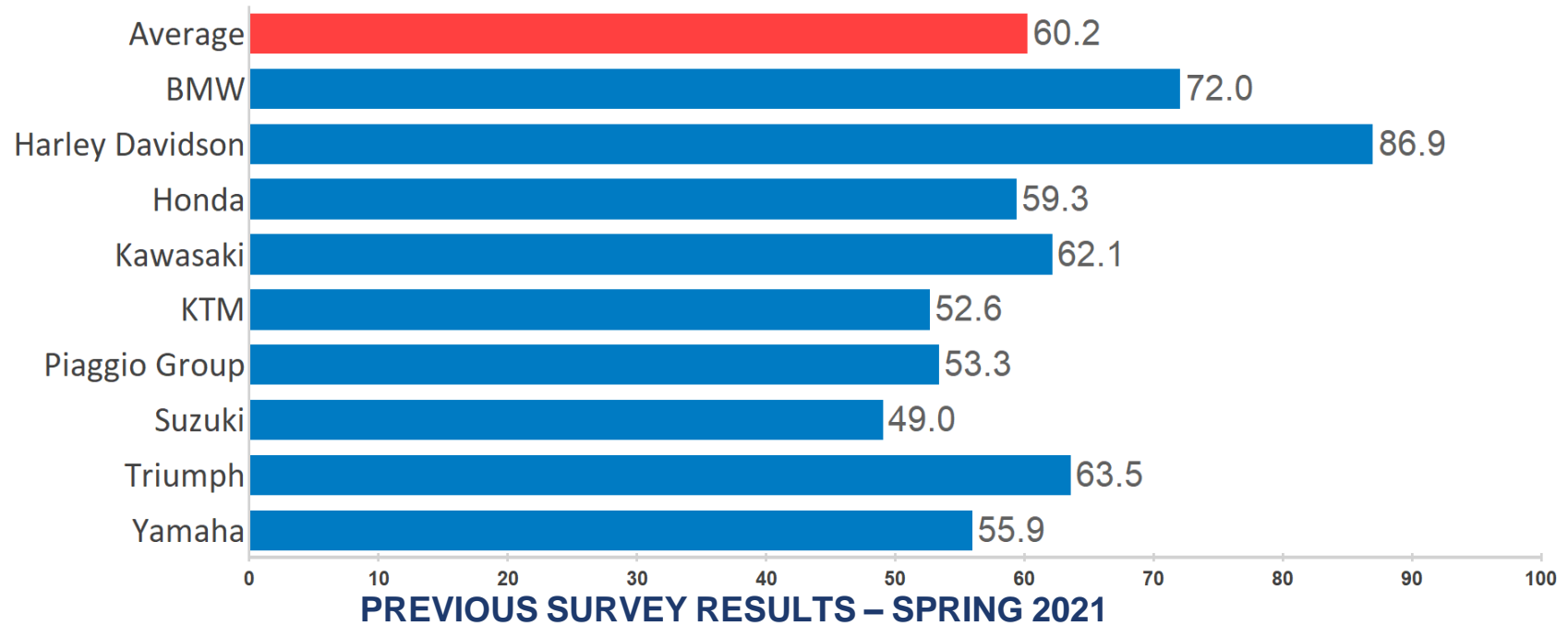


## PREVIOUS SURVEY RESULTS – SPRING 2021

Q10: What is your labour rate for retail (£)			
BMW	84.3	Lexmoto	45.8
Ducati	75.7	Royal Enfield	50.0
Harley Davidson	91.1	Suzuki	57.5
Honda	63.7	Triumph	76.0
Kawasaki	58.1	Yamaha	63.0
KTM	67.7		
Piaggio Group	63.8	<b>AVERAGE</b>	<b>66.6</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

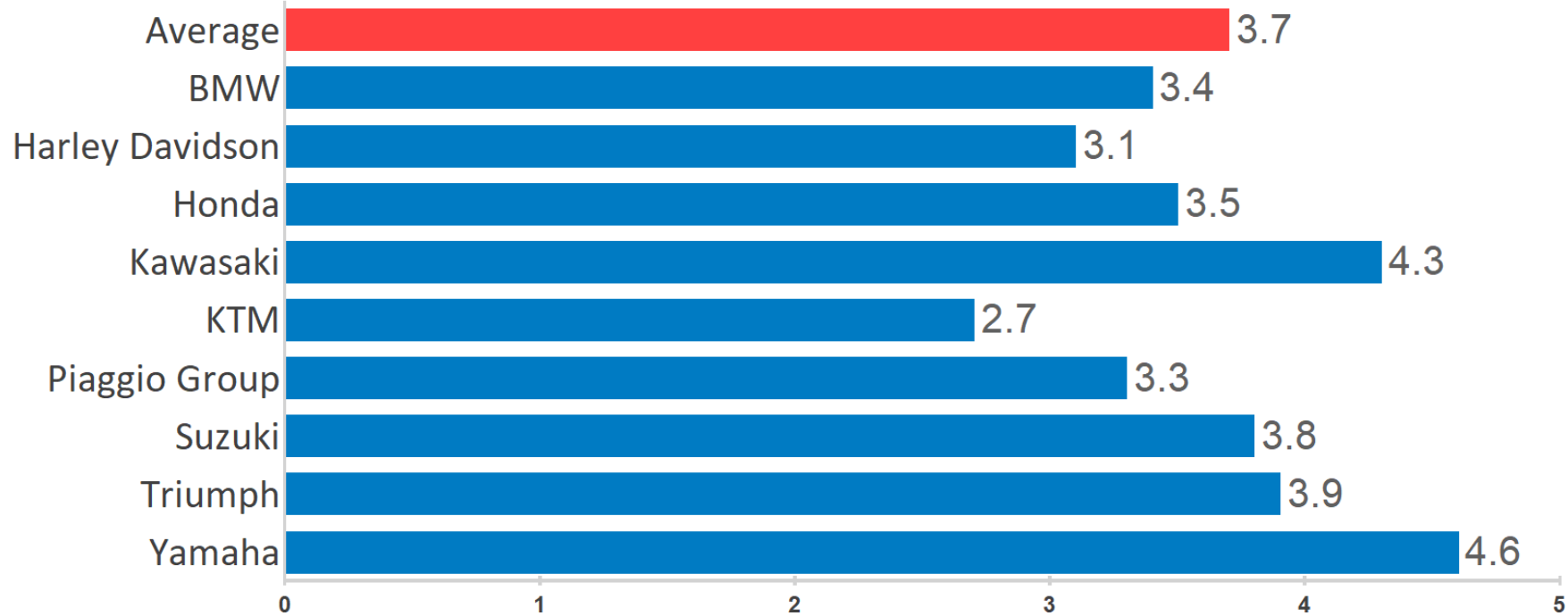
Q11) What is your labour rate for warranty before VAT (£)



Q11. What is your labour rate for warranty before VAT (£)			
BMW	72.1	Lexmoto	27.0
Ducati	66.2	Royal Enfield	37.0
Harley Davidson	91.1	Suzuki	44.6
Honda	52.8	Triumph	58.9
Kawasaki	57.3	Yamaha	50
KTM	56.3		
Piaggio Group	44.3	<b>AVERAGE</b>	<b>54.5</b>

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

Q12 a) Timely and fair settlement of warranty claims

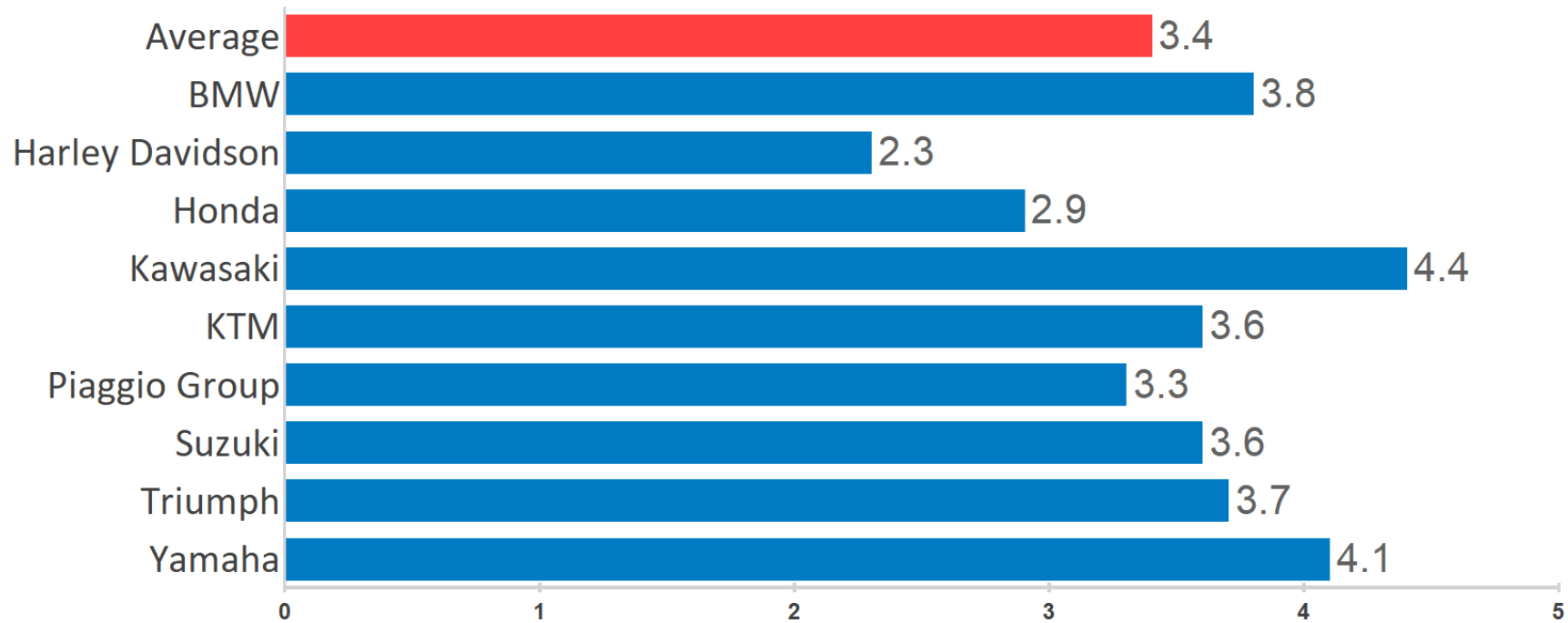


PREVIOUS SURVEY RESULTS – SPRING 2021

Q12a: Timely and fair settlement of warranty claims			
BMW	4.4	Lexmoto	4.3
Ducati	4.9	Royal Enfield	4.0
Harley Davidson	3.4	Suzuki	3.8
Honda	3.6	Triumph	3.8
Kawasaki	4.5	Yamaha	4.0
KTM	3.3		
Piaggio Group	3.3	<b>AVERAGE</b>	<b>3.9</b>

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

Q12 b) Availability of technical support

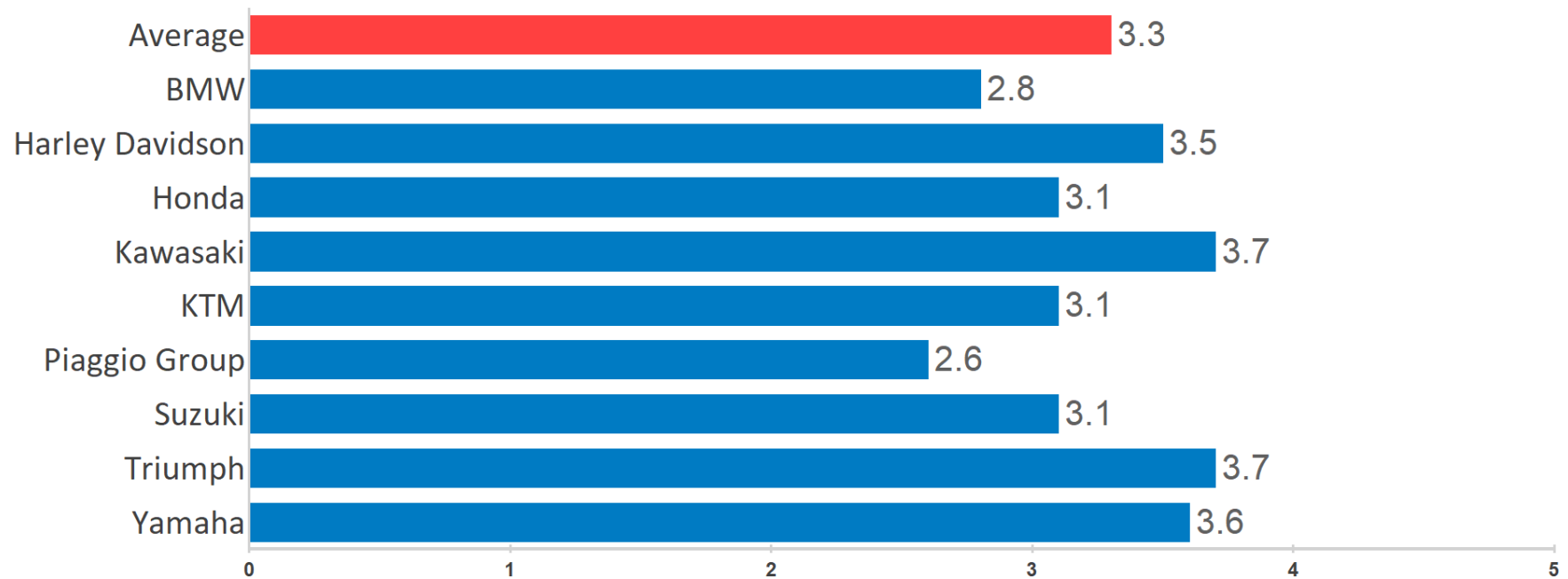


PREVIOUS SURVEY RESULTS – SPRING 2021

Q12b: The availability of technical support			
BMW	4.1	Lexmoto	4.3
Ducati	4.7	Royal Enfield	3.7
Harley Davidson	3.1	Suzuki	3.4
Honda	2.7	Triumph	3.6
Kawasaki	4.5	Yamaha	4.0
KTM	3.6		
Piaggio Group	3.4	<b>AVERAGE</b>	<b>3.6</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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



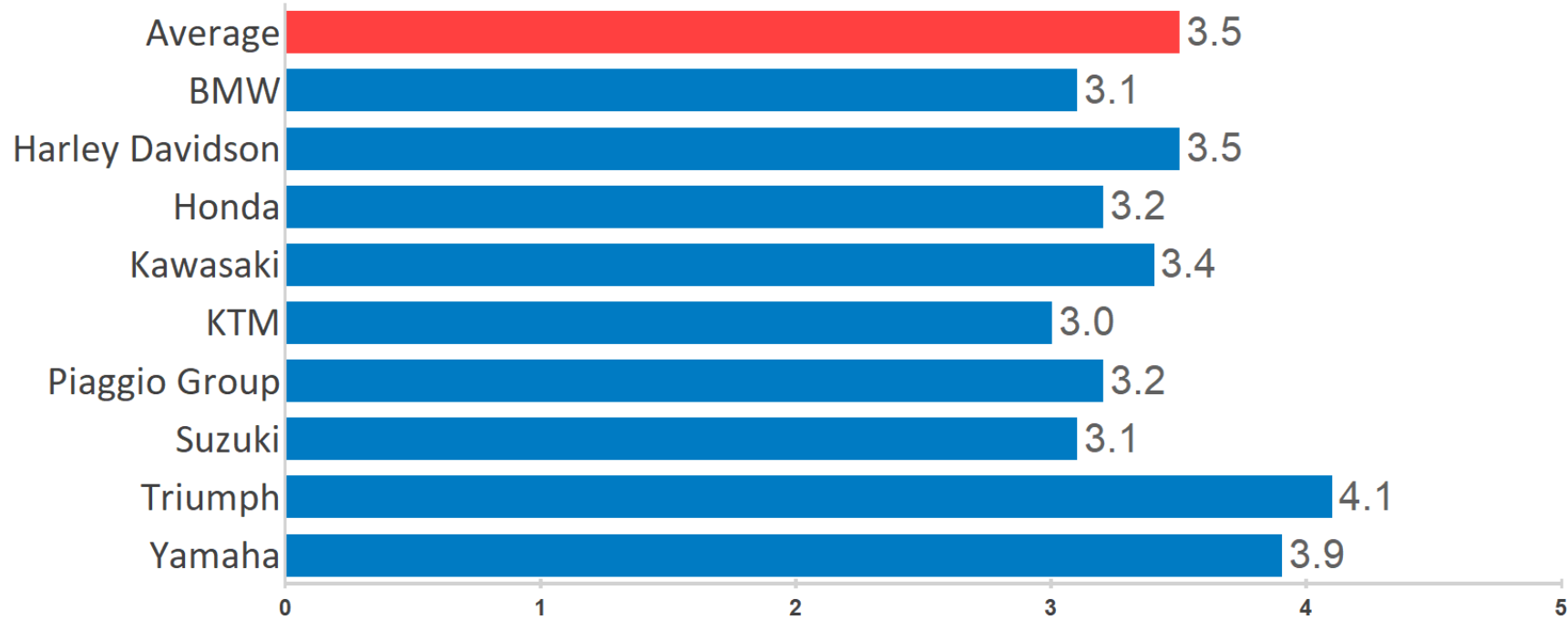
## PREVIOUS SURVEY RESULTS – SPRING 2021

Q13: The profit return by representing your franchise			
BMW	2.9	Lexmoto	3.4
Ducati	4.6	Royal Enfield	4.0
Harley Davidson	2.9	Suzuki	2.5
Honda	2.3	Triumph	3.5
Kawasaki	3.4	Yamaha	2.0
KTM	2.8		
Piaggio Group	2.3	<b>AVERAGE</b>	<b>2.9</b>



NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

Q14 a) The future profitability of your business

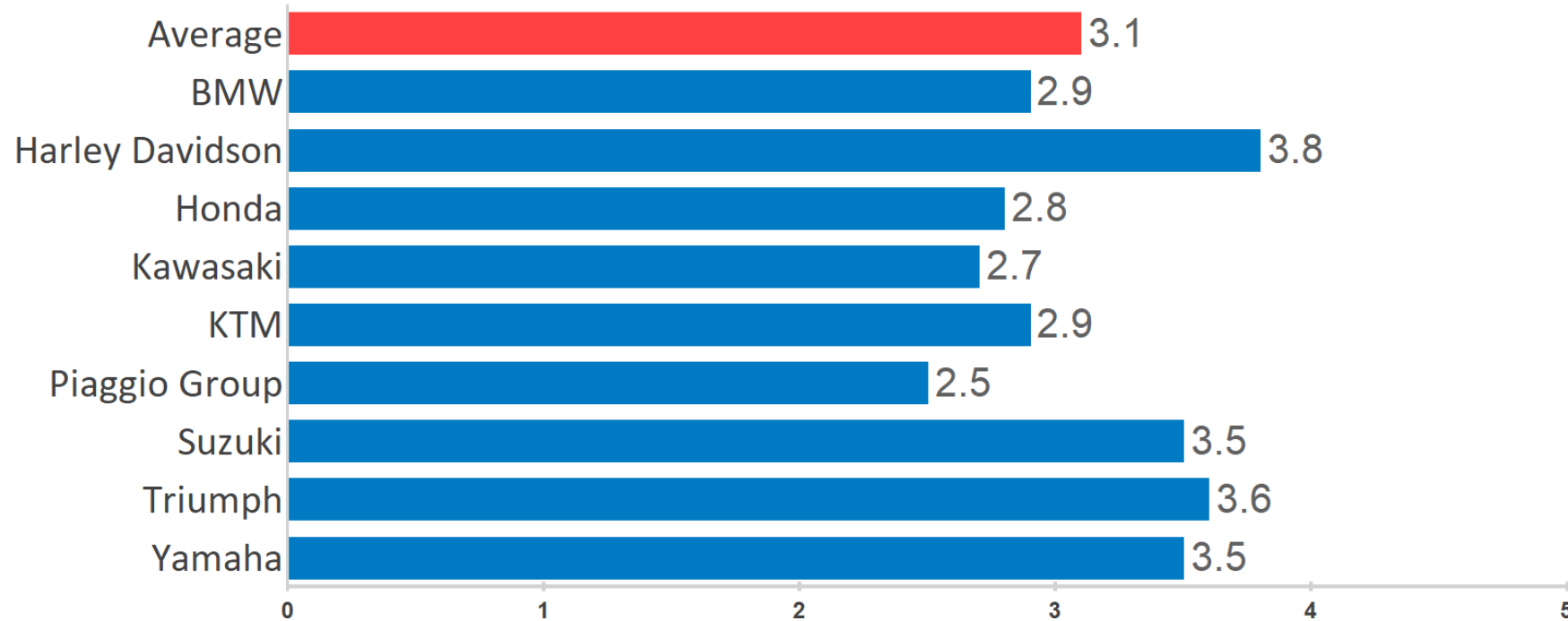


PREVIOUS SURVEY RESULTS – SPRING 2021

Q14a: The future profitability of your business			
BMW	3.2	Lexmoto	3.6
Ducati	4.4	Royal Enfield	4.0
Harley Davidson	3.3	Suzuki	3.0
Honda	2.5	Triumph	3.7
Kawasaki	3.0	Yamaha	3.0
KTM	3.0		
Piaggio Group	2.9	<b>AVERAGE</b>	<b>3.1</b>

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

Q15 a) The dealer standards expected by your manufacturer

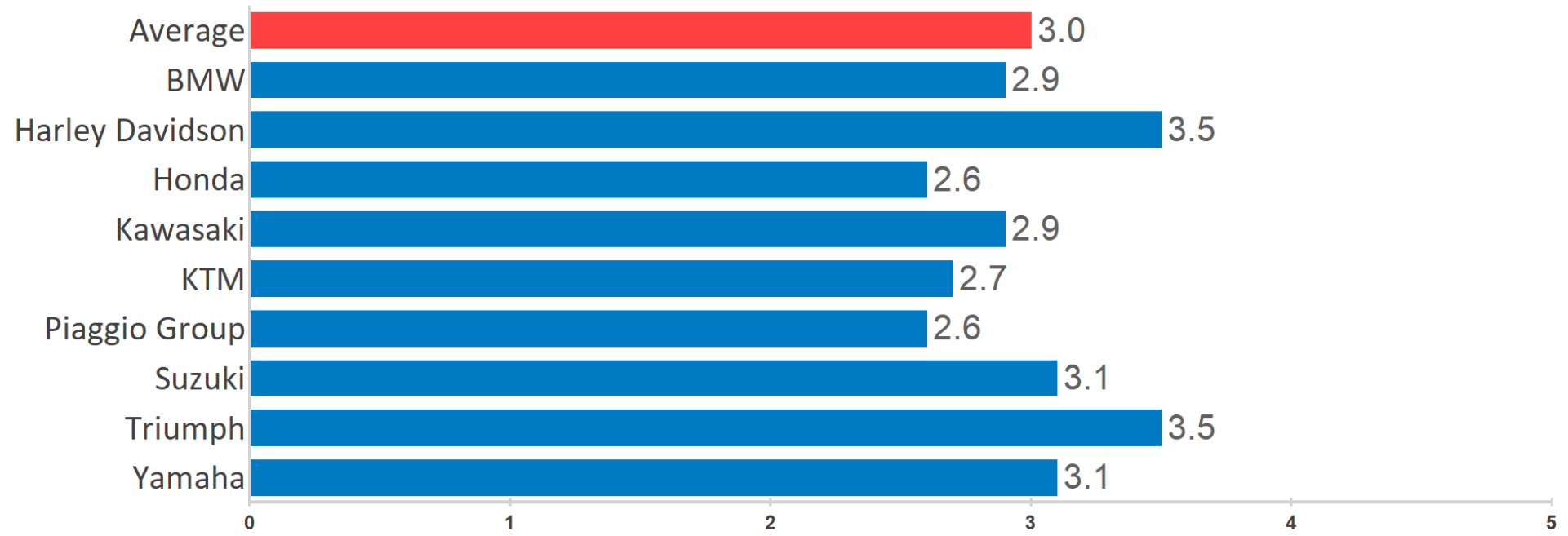


PREVIOUS SURVEY RESULTS – SPRING 2021

Q15a: The dealer standards expected by your manufacturer			
BMW	3.2	Lexmoto	3.9
Ducati	4.4	Royal Enfield	4.3
Harley Davidson	3.6	Suzuki	3.0
Honda	2.3	Triumph	3.6
Kawasaki	2.5	Yamaha	3.0
KTM	2.2		
Piaggio Group	2.4	<b>AVERAGE</b>	<b>3.0</b>

**NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021**

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

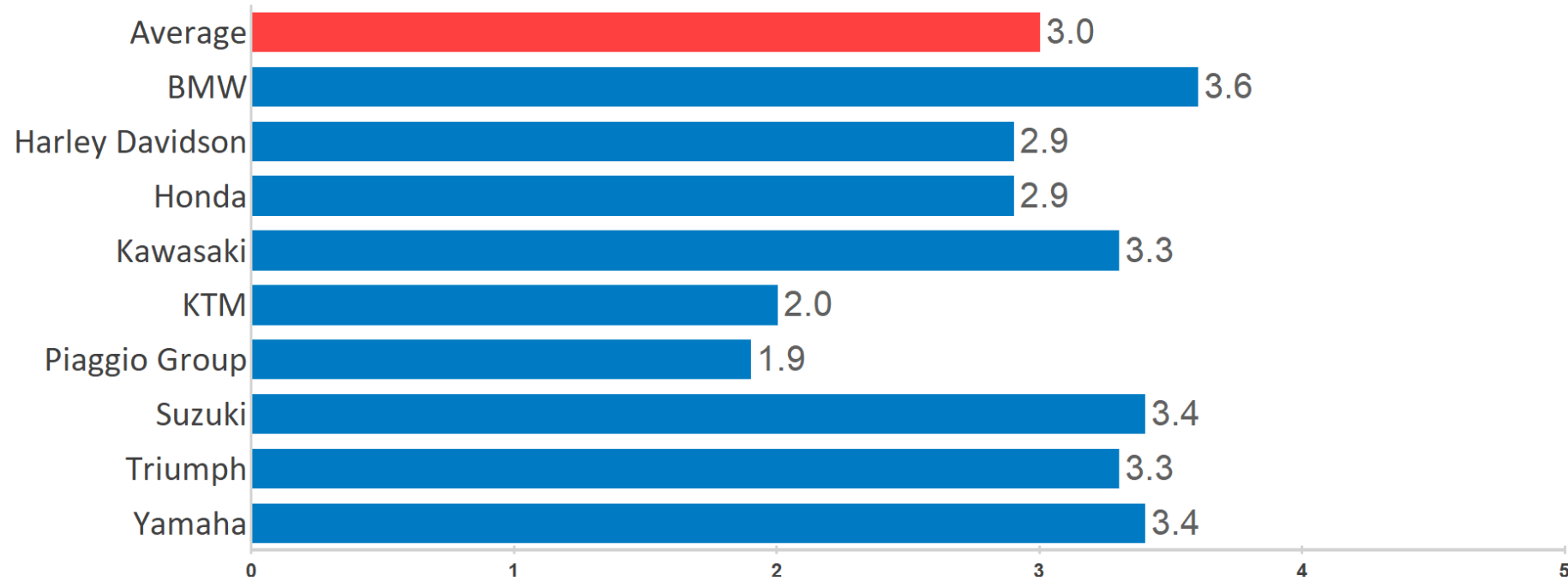


**PREVIOUS SURVEY RESULTS – SPRING 2021**

<b>Q15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward</b>			
BMW	2.5	Lexmoto	3.8
Ducati	4.3	Royal Enfield	4.3
Harley Davidson	3.5	Suzuki	2.9
Honda	2.0	Triumph	3.4
Kawasaki	2.6	Yamaha	2.0
KTM	2.1		
Piaggio Group	2.6	<b>AVERAGE</b>	<b>2.8</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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

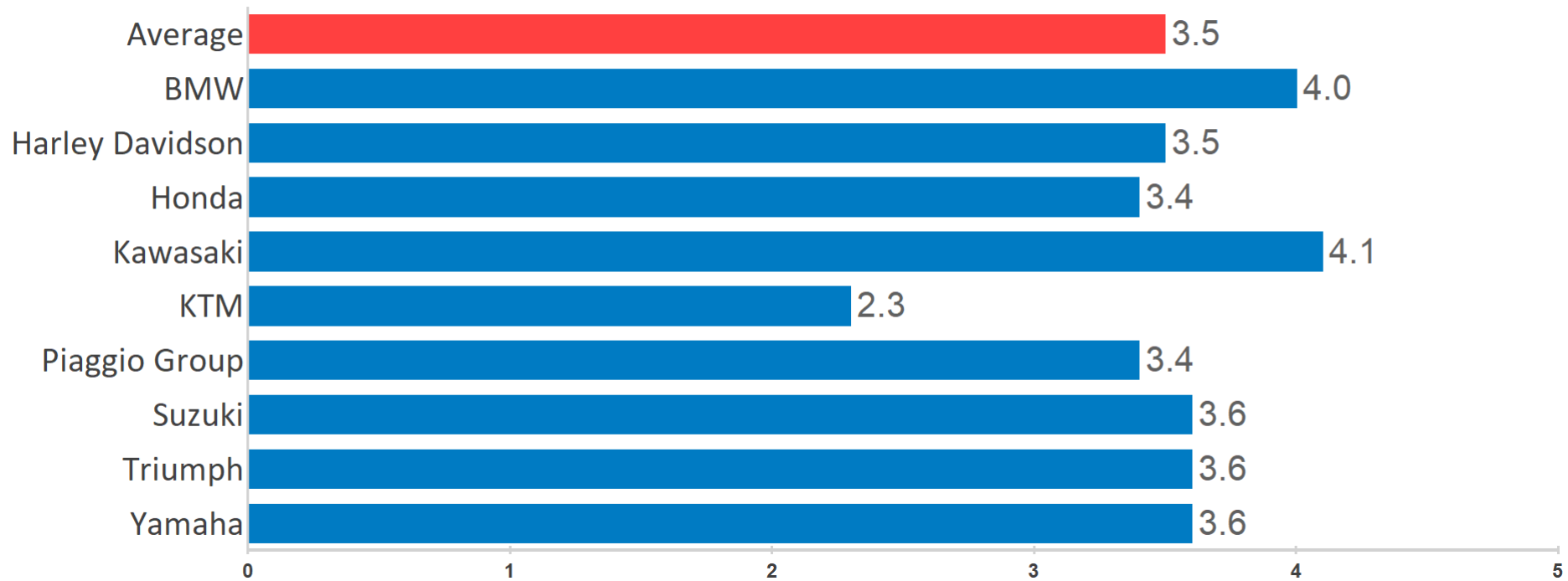


## PREVIOUS SURVEY RESULTS – SPRING 2021

Q16a: That the management of your manufacturer takes dealers' views and opinions into account			
BMW	3.7	Lexmoto	3.8
Ducati	4.5	Royal Enfield	4.5
Harley Davidson	3.6	Suzuki	2.8
Honda	2.3	Triumph	3.2
Kawasaki	3.1	Yamaha	3.0
KTM	1.9		
Piaggio Group	2.1	<b>AVERAGE</b>	<b>3.0</b>

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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

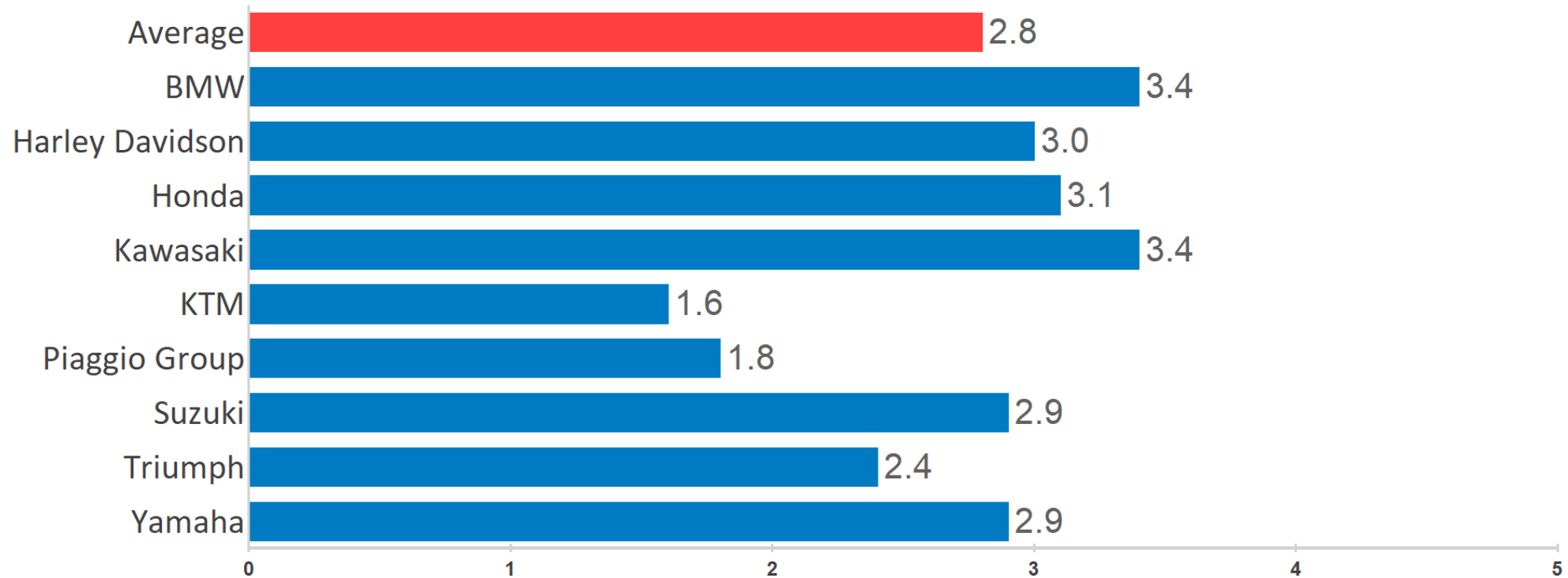


PREVIOUS SURVEY RESULTS – SPRING 2021

Q16b: The effectiveness of your manufacturer's retail finance programme			
BMW	4.4	Lexmoto	3.4
Ducati	4.7	Royal Enfield	4.0
Harley Davidson	3.3	Suzuki	3.4
Honda	3.0	Triumph	3.9
Kawasaki	3.9	Yamaha	3.0
KTM	3.1		
Piaggio Group	2.1	<b>AVERAGE</b>	<b>3.4</b>

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

Q16 c) The effectiveness of your dealer council and dealer forums

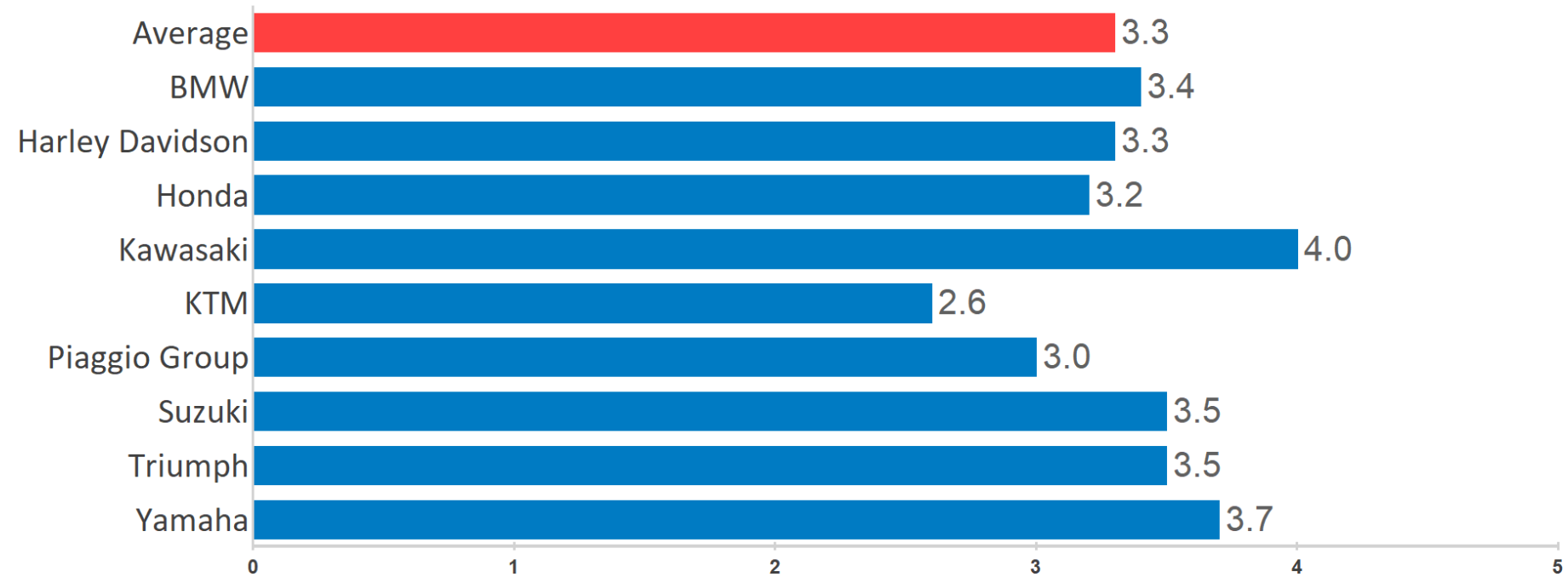


PREVIOUS SURVEY RESULTS – SPRING 2021

Q16c: The effectiveness of your dealer council and dealer forums			
BMW	4.2	Lexmoto	4.0
Ducati	4.1	Royal Enfield	3.7
Harley Davidson	3.8	Suzuki	2.3
Honda	2.5	Triumph	2.2
Kawasaki	1.8	Yamaha	3.0
KTM	1.6		
Piaggio Group	1.5	<b>AVERAGE</b>	<b>2.8</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

Q17 a) The routine procedures and controls expected

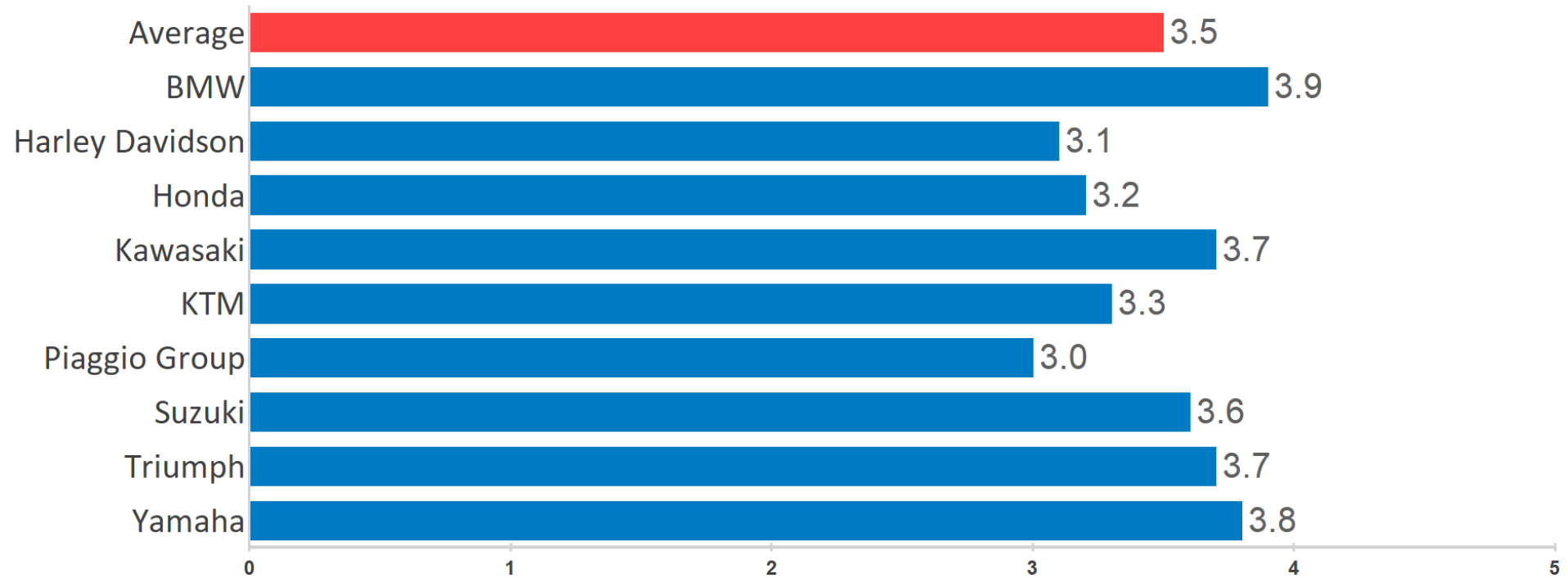


## PREVIOUS SURVEY RESULTS – SPRING 2021

Q17a: The routine procedures and controls expected			
BMW	3.7	Lexmoto	4.1
Ducati	4.5	Royal Enfield	4.0
Harley Davidson	3.8	Suzuki	2.9
Honda	2.3	Triumph	3.4
Kawasaki	3.6	Yamaha	3.0
KTM	2.8		
Piaggio Group	2.6	<b>AVERAGE</b>	<b>3.2</b>

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

Q17 b) The quality of your manufacturer's training



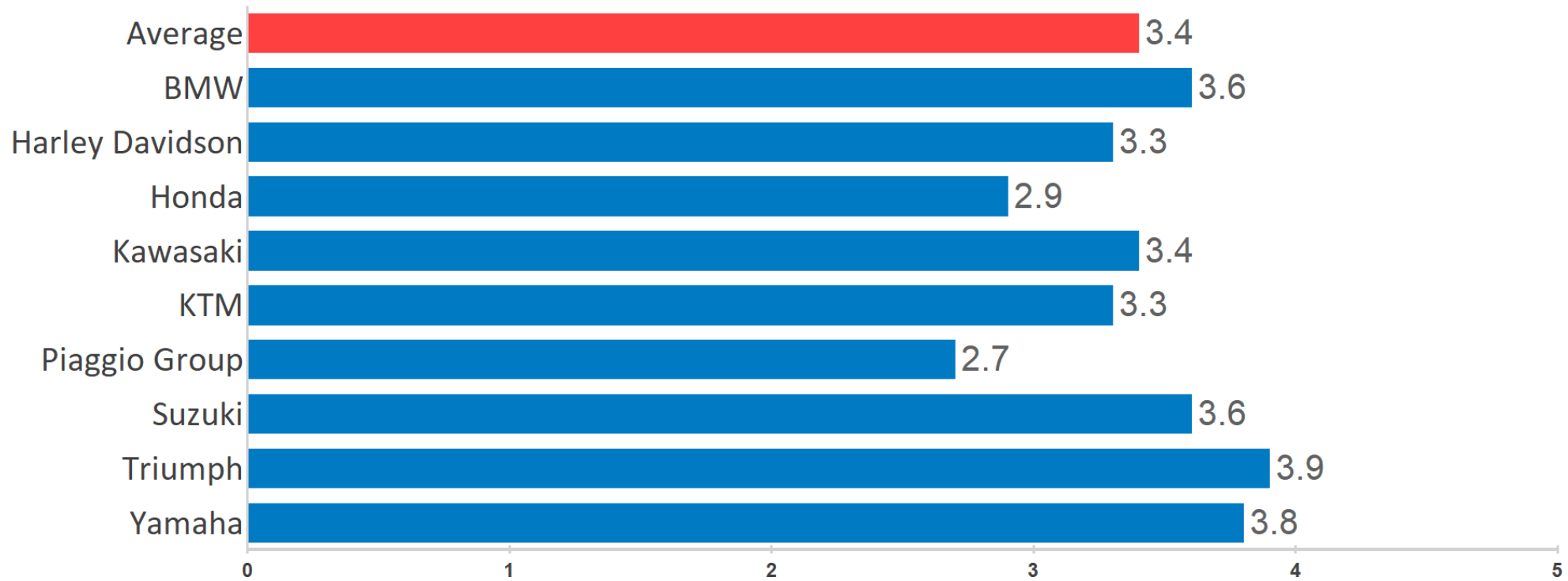
PREVIOUS SURVEY RESULTS – SPRING 2021

Q17b: The quality of your manufacturer's training			
BMW	3.9	Lexmoto	3.3
Ducati	4.6	Royal Enfield	3.7
Harley Davidson	3.3	Suzuki	3.5
Honda	3.2	Triumph	3.8
Kawasaki	3.8	Yamaha	4.0
KTM	3.1		
Piaggio Group	2.6	<b>AVERAGE</b>	<b>3.5</b>



NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

Q17 c) The cost of your manufacturer's training

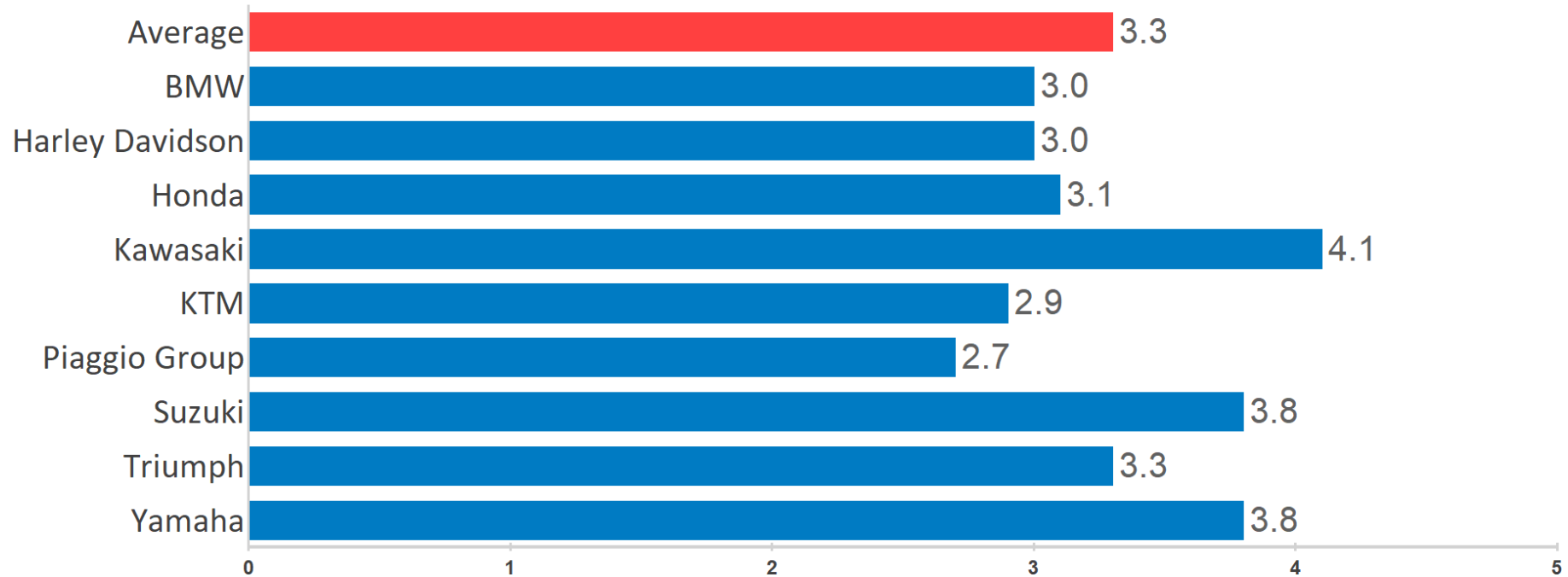


PREVIOUS SURVEY RESULTS – SPRING 2021

17c: The cost of your manufacturer's training			
BMW	3.1	Lexmoto	3.7
Ducati	4.4	Royal Enfield	3.7
Harley Davidson	2.5	Suzuki	3.4
Honda	2.9	Triumph	3.7
Kawasaki	3.5	Yamaha	4.0
KTM	3.0		
Piaggio Group	2.5	<b>AVERAGE</b>	<b>3.3</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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

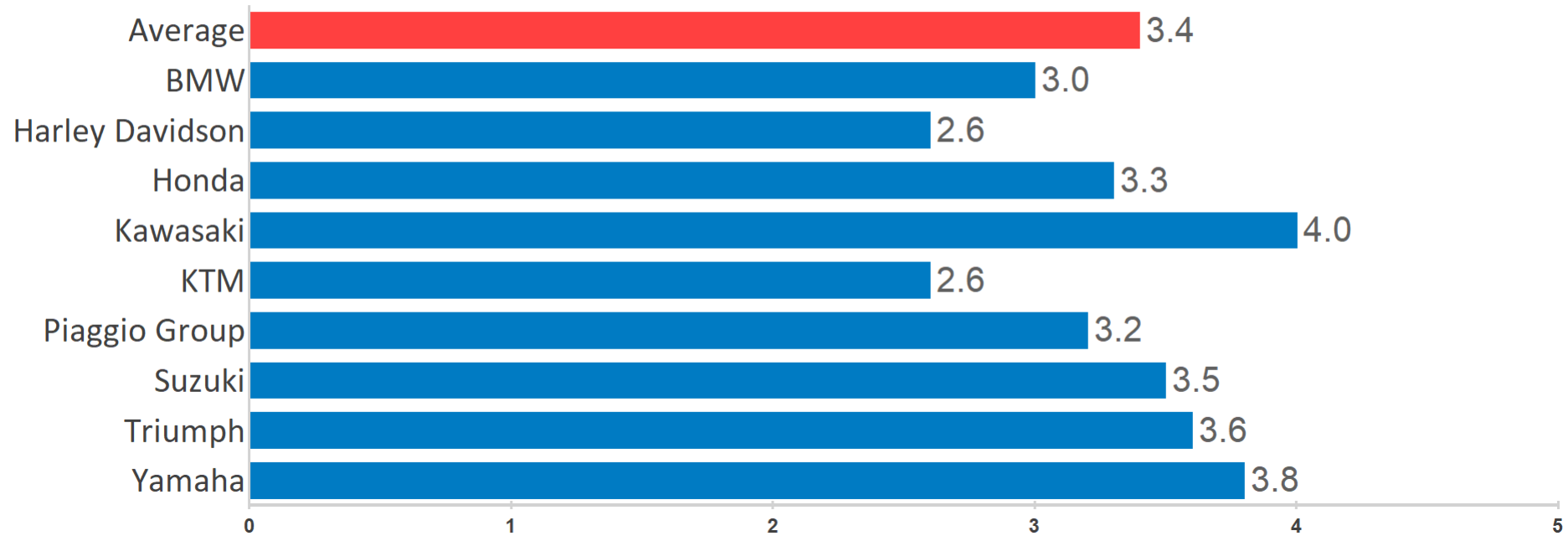


### PREVIOUS SURVEY RESULTS – SPRING 2021

Q17d: Your ability to do business with your manufacturer on a day-to-day basis			
BMW	3.7	Lexmoto	4.8
Ducati	4.4	Royal Enfield	4.0
Harley Davidson	4.0	Suzuki	3.6
Honda	2.7	Triumph	3.8
Kawasaki	4.3	Yamaha	4.0
KTM	3.4		
Piaggio Group	2.4	<b>AVERAGE</b>	<b>3.5</b>

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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

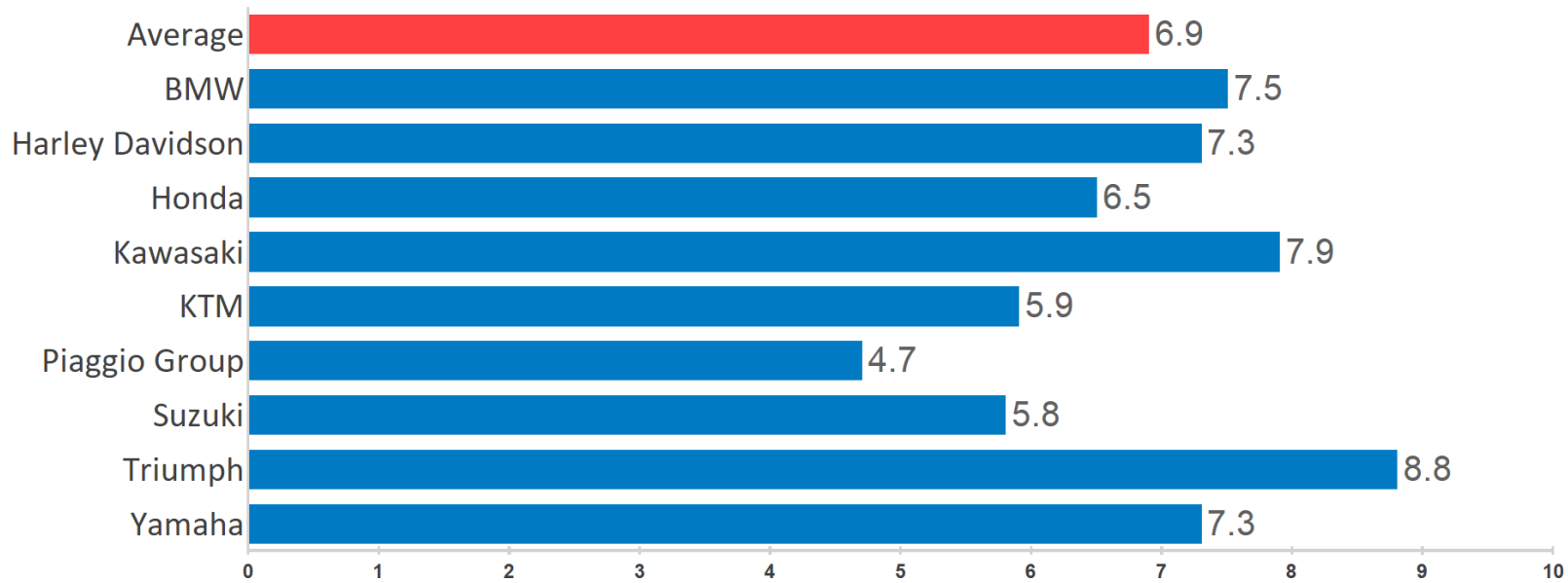


PREVIOUS SURVEY RESULTS – SPRING 2021

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process			
BMW	3.7	Lexmoto	4.5
Ducati	4.6	Royal Enfield	4.0
Harley Davidson	3.8	Suzuki	3.9
Honda	3.0	Triumph	4.0
Kawasaki	4.1	Yamaha	4.0
KTM	3.4		
Piaggio Group	2.2	<b>AVERAGE</b>	<b>3.6</b>

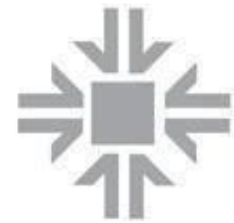
## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2021

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



## PREVIOUS SURVEY RESULTS – SPRING 2021

Q18: Overall, how do you rate the value of holding your motorcycle franchise			
BMW	6.8	Lexmoto	8.0
Ducati	9.2	Royal Enfield	9.0
Harley Davidson	7.3	Suzuki	5.2
Honda	4.8	Triumph	8.3
Kawasaki	7.3	Yamaha	6.0
KTM	6.2		
Piaggio Group	3.4	<b>AVERAGE</b>	<b>6.3</b>



# NMDA

NATIONAL MOTORCYCLE DEALERS ASSOCIATION

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