

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY



NATIONAL MOTORCYCLE DEALERS ASSOCIATION
DEALER ATTITUDE SURVEY RESULTS

SPRING 2019

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY SPRING 2019

We are pleased to reveal the findings of the latest Motorcycle Dealer Attitude Survey conducted in April 2019 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.

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.

NB:

National Motorcycle Dealers Association

May 2019

Tel: Stephen Latham: 07515 975157 Email: stephenlatham@rmif.co.uk

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY



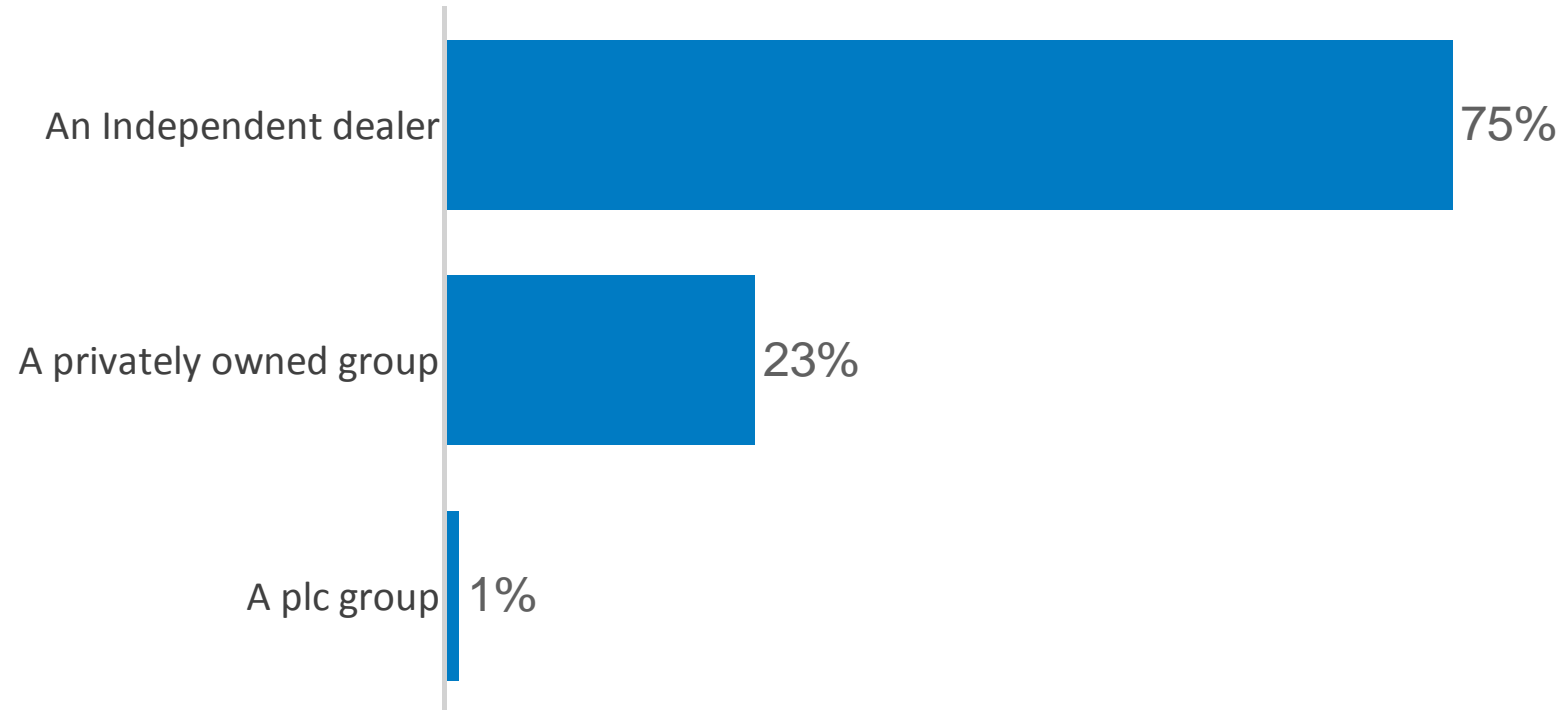
NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

BREAKDOWN OF RESPONSES

FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
DUCATI	2	30	7
BMW	5	37	14
HARLEY DAVIDSON	14	30	47
HONDA	31	64	48
KAWASAKI	13	62	21
KTM	3	31	10
PIAGGIO GROUP	15	57	26
SUZUKI	16	100	16
TRIUMPH	14	45	31
YAMAHA	22	88	25
TOTAL	135	574	23

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q2 In this site are you:

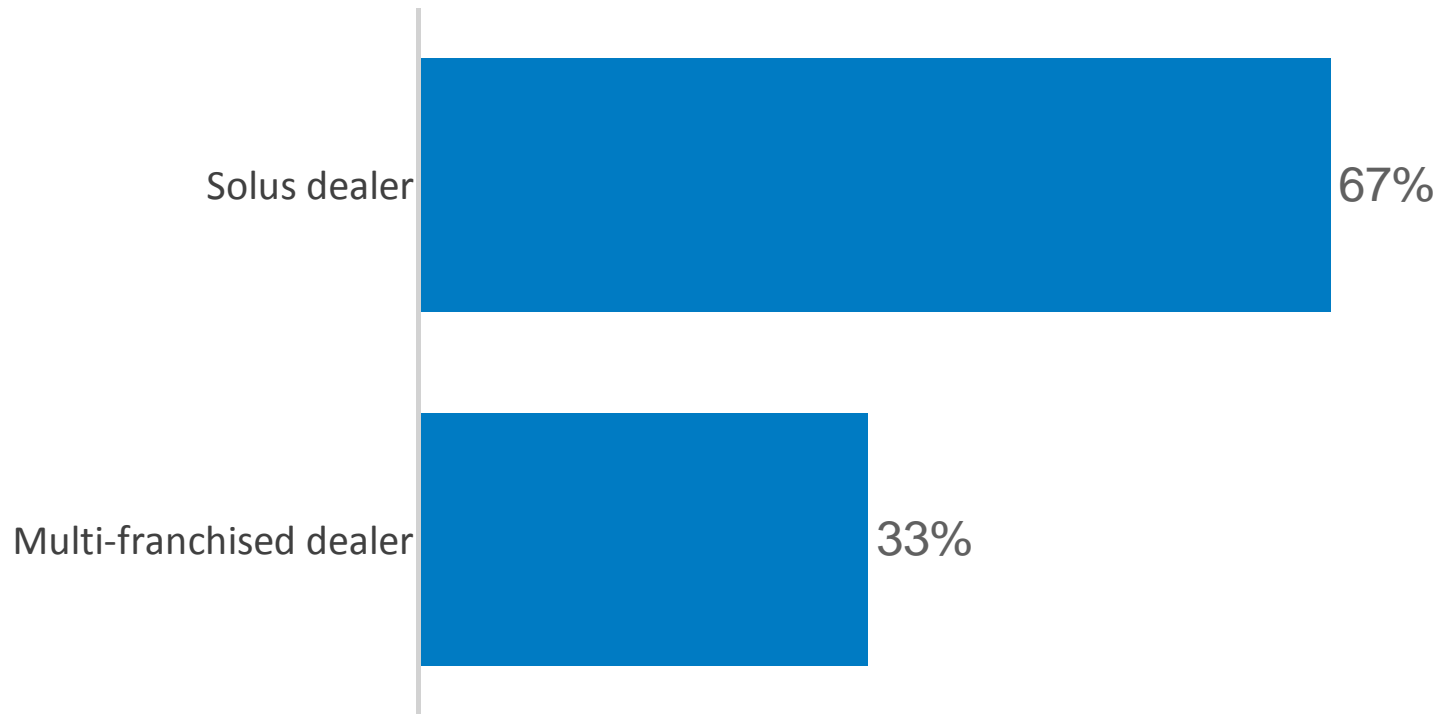


AUTUMN 2018 SURVEY RESULTS

INDEPENDENT	79%
PRIVATELY OWNED	19%
PLC GROUP	1%

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q3 Is this site:

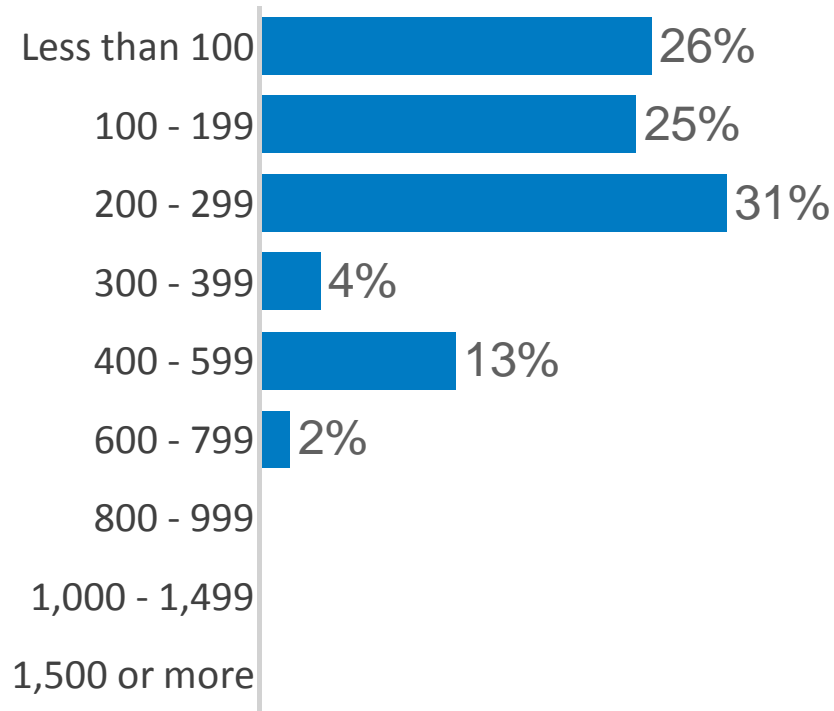


AUTUMN 2018 SURVEY RESULTS

SOLUS	59%
MULTI-FRANCHISED	41%

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q4 How many new motorcycles do you sell per annum?

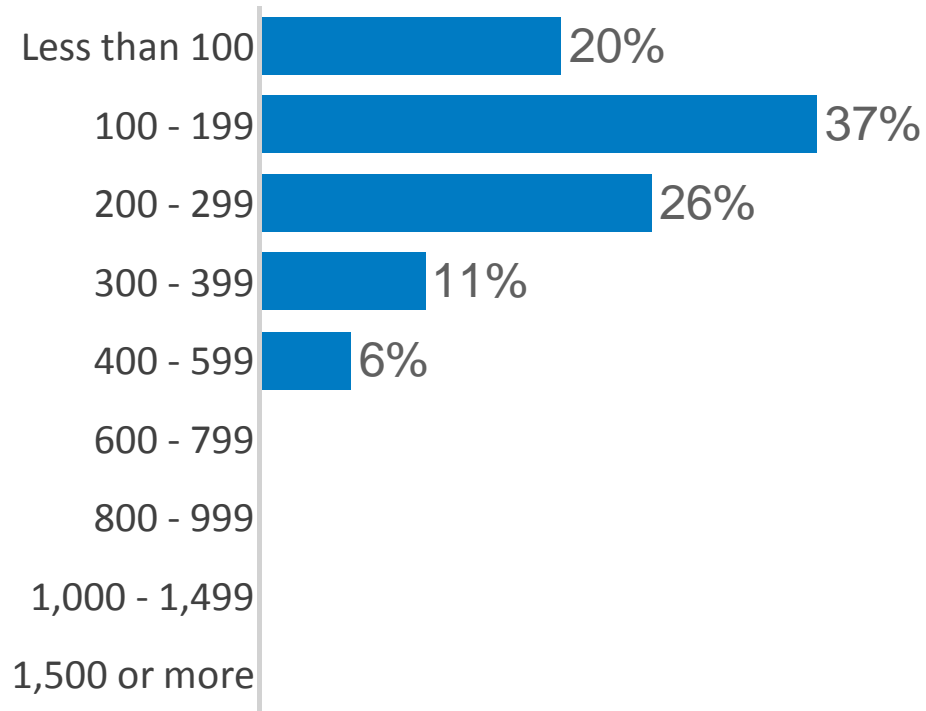


AUTUMN 2018 SURVEY RESULTS

Less than 100	26%	400 – 599	3%
100 – 199	41%	600 – 799	2%
200 – 299	19%	800 – 999	1%
300 – 399	8%	1000 – 1499	1%
1500 or more	0%		

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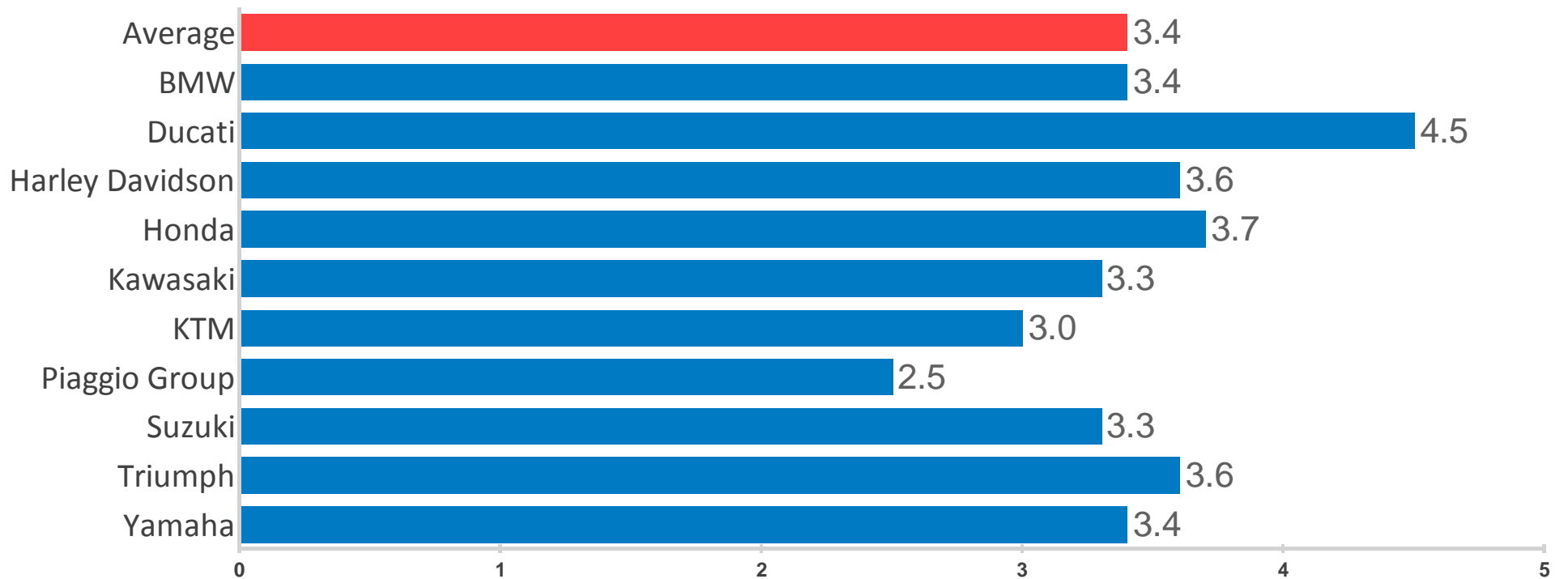
Q5 How many used motorcycles do you sell per annum?



AUTUMN 2018 SURVEY RESULTS			
Less than 100	18%	400 – 599	7%
100 – 199	44%	600 – 799	2%
200 – 299	22%	800 – 999	1%
300 – 399	6%	1000 – 1499	1%
1500 or more	0%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

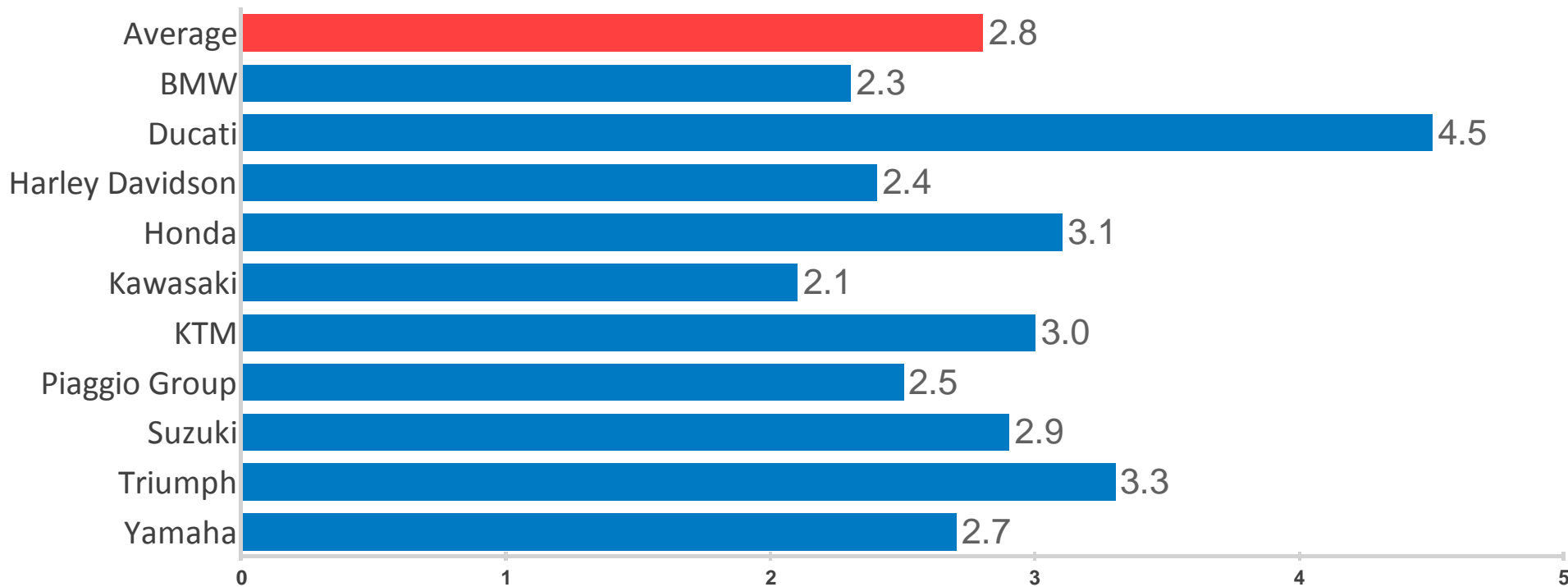


PREVIOUS SURVEY RESULTS – AUTUMN 2018

6a: The product's price and value against other brands			
		Triumph	3.6
Harley Davidson	4.1	Yamaha	3.1
Honda	3.3		
Kawasaki	4.4		
KTM	3.6		
Piaggio Group	2.7		
Suzuki	3.6	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

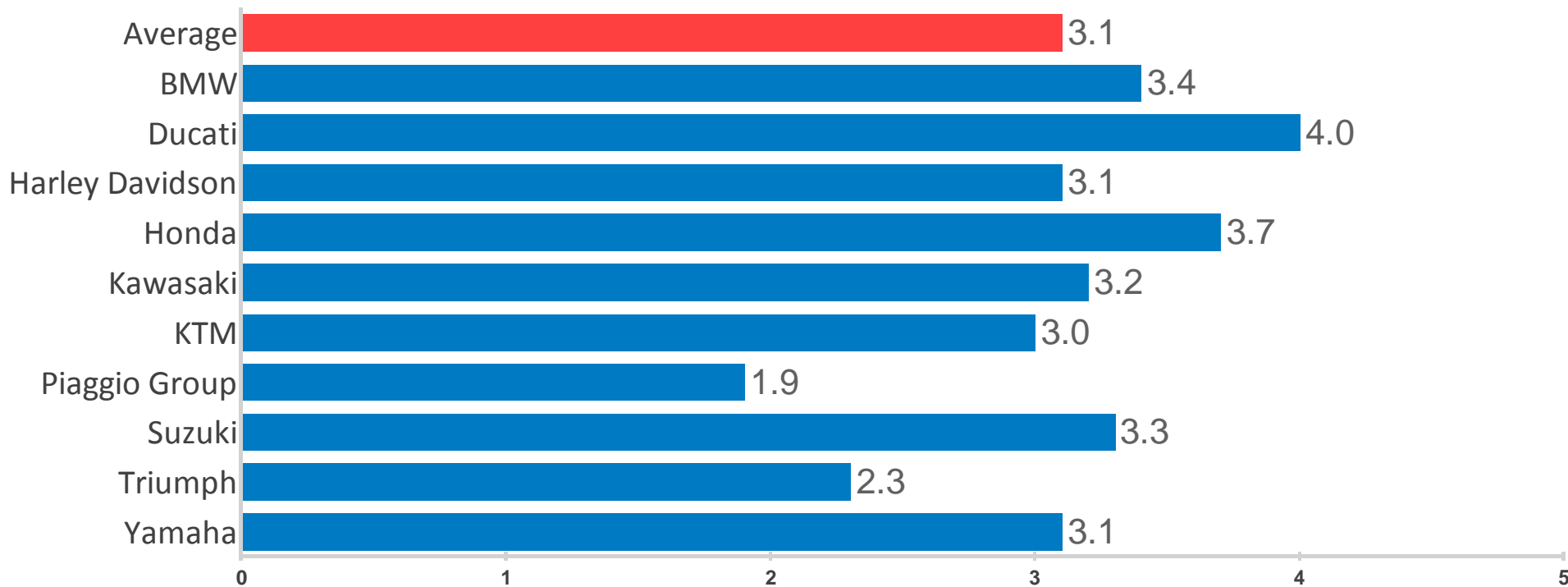


PREVIOUS SURVEY RESULTS – AUTUMN 2018

6b: How realistic is your target and performance related bonus in terms of achievement			
		Triumph	2.9
Harley Davidson	4.1	Yamaha	2.6
Honda	2.6		
Kawasaki	3.6		
KTM	2.3		
Piaggio Group	2.7		
Suzuki	3.3	AVERAGE	2.9

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

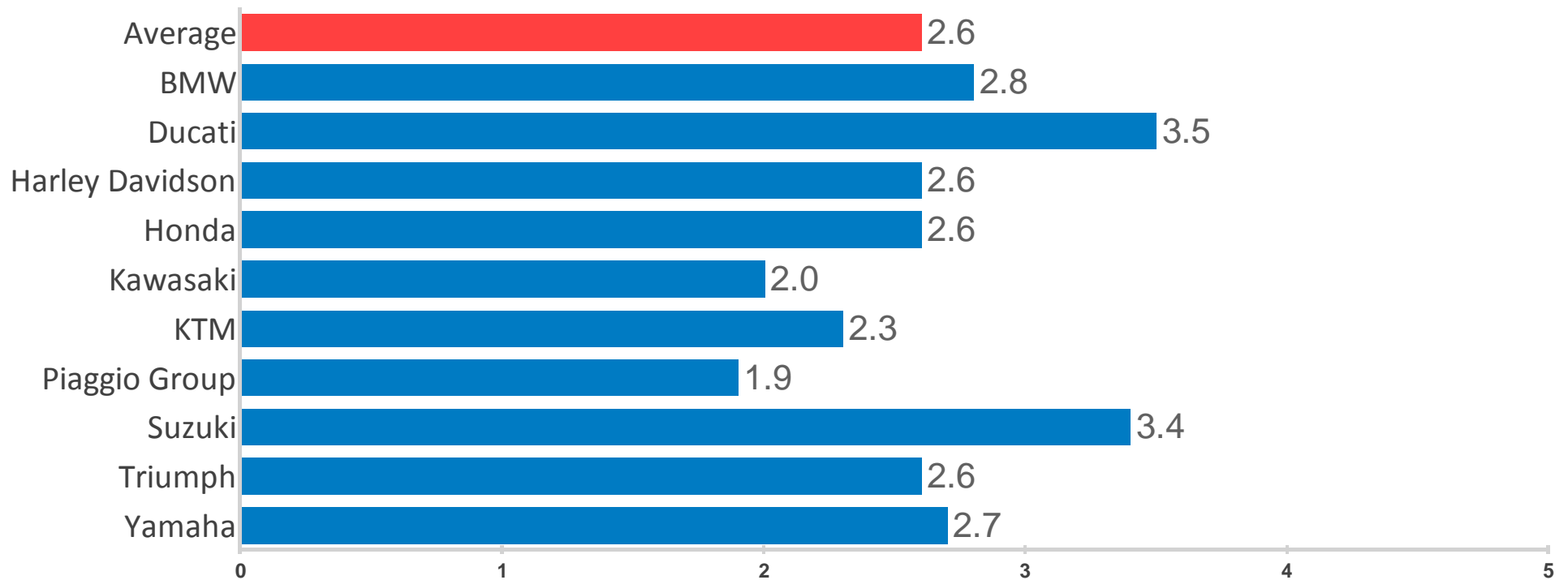


PREVIOUS SURVEY RESULTS – AUTUMN 2018

7a: The fairness of your manufacturer's policy for the supply and stocking of motorcycles			
		Triumph	2.7
Harley Davidson	4.3	Yamaha	3.2
Honda	3.1		
Kawasaki	4.0		
KTM	3.4		
Piaggio Group	2.7		
Suzuki	3.6	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q7 b) The new motorcycle target negotiating process

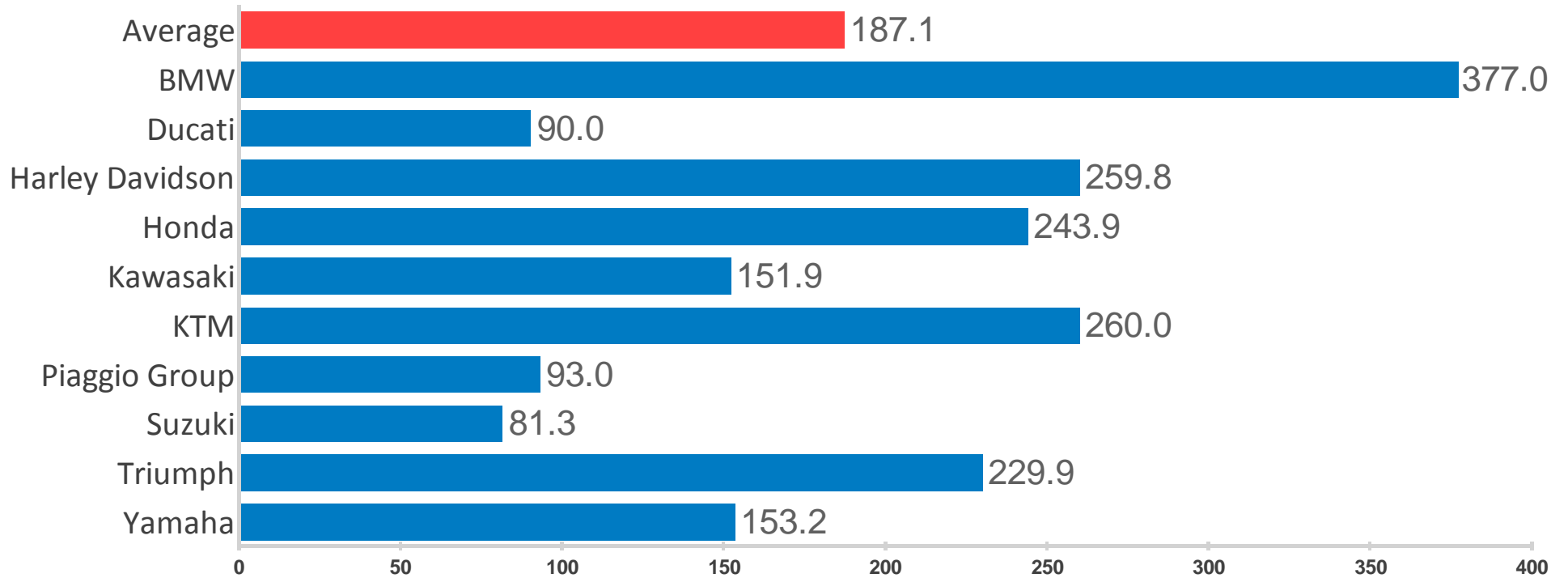


PREVIOUS SURVEY RESULTS – AUTUMN 2018

7b: Your new motorcycle target negotiating process			
		Triumph	2.4
Harley Davidson	4.1	Yamaha	2.6
Honda	2.6		
Kawasaki	3.3		
KTM	2.3		
Piaggio Group	2.4		
Suzuki	3.7	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q7c) What is your annual target for this brand?

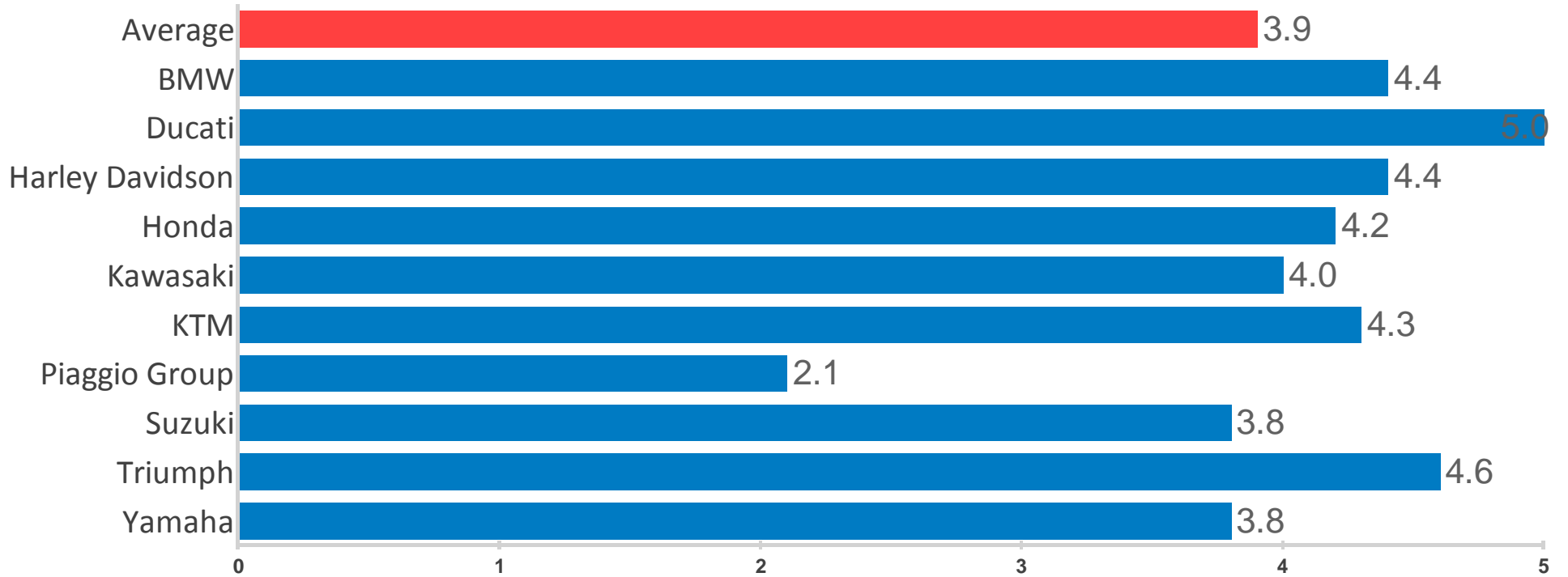


PREVIOUS SURVEY RESULTS – AUTUMN 2018

7c: What is your annual target for this brand			
		Triumph	175.4
Harley Davidson	188.8	Yamaha	161.5
Honda	292.5		
Kawasaki	110.5		
KTM	288.2		
Piaggio Group	168.9		
Suzuki	72.2	AVERAGE	190.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q8 a) The brand image

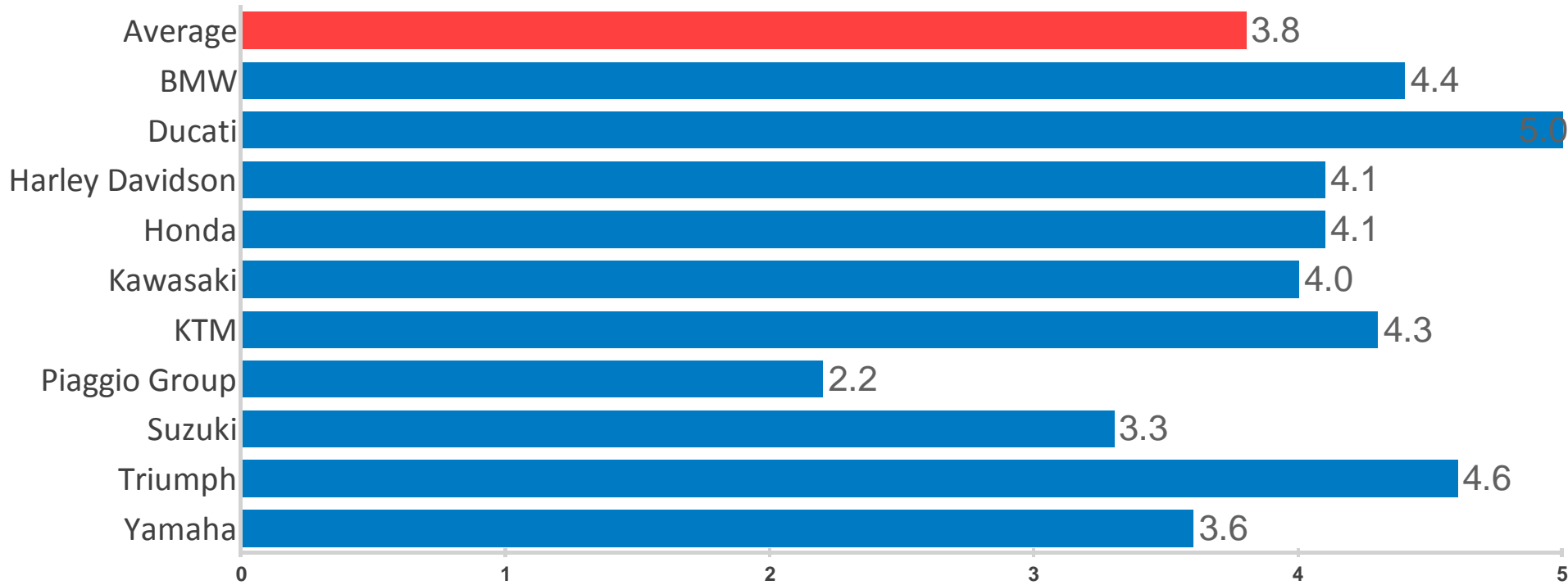


PREVIOUS SURVEY RESULTS – AUTUMN 2018

8a: The brand image			
		Triumph	4.6
Harley Davidson	4.9	Yamaha	3.8
Honda	3.7		
Kawasaki	4.4		
KTM	4.7		
Piaggio Group	2.8		
Suzuki	3.6	AVERAGE	3.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q8 b) The product image

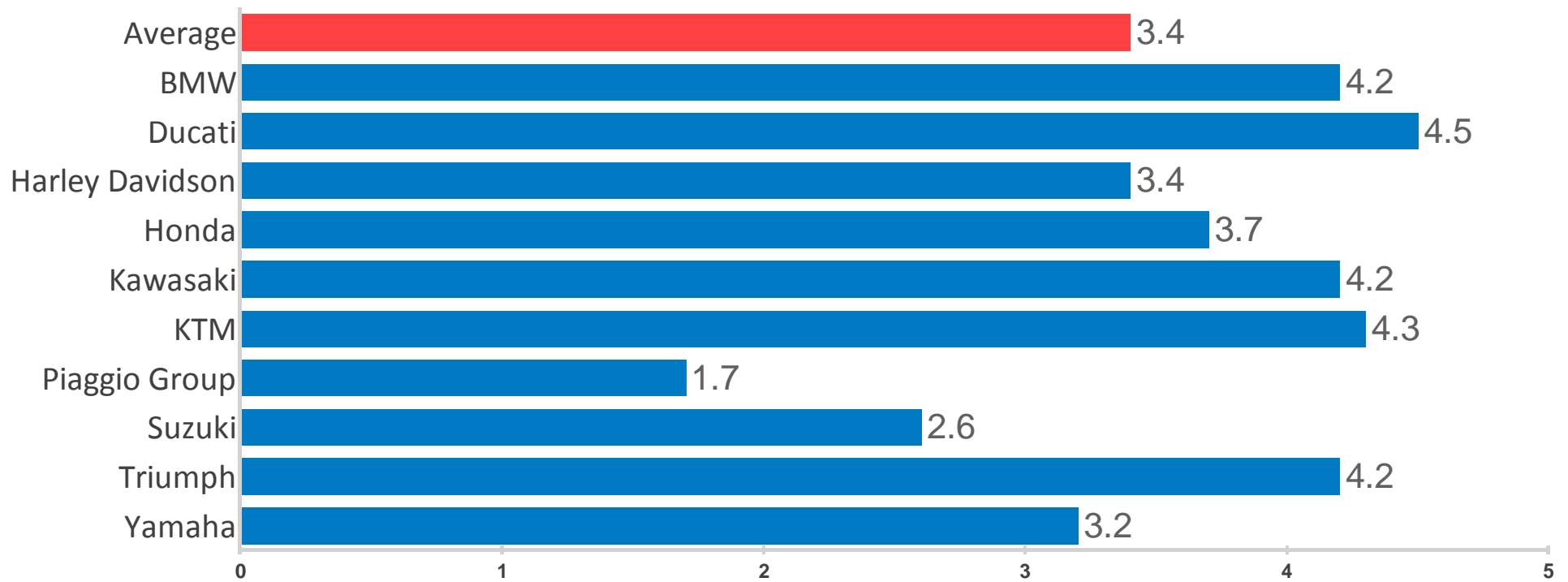


PREVIOUS SURVEY RESULTS – AUTUMN 2018

8b: The product image			
		Triumph	4.4
Harley Davidson	4.4	Yamaha	3.8
Honda	3.7		
Kawasaki	4.4		
KTM	4.7		
Piaggio Group	2.8		
Suzuki	3.5	AVERAGE	3.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q8 c) Frequency of introduction of new models

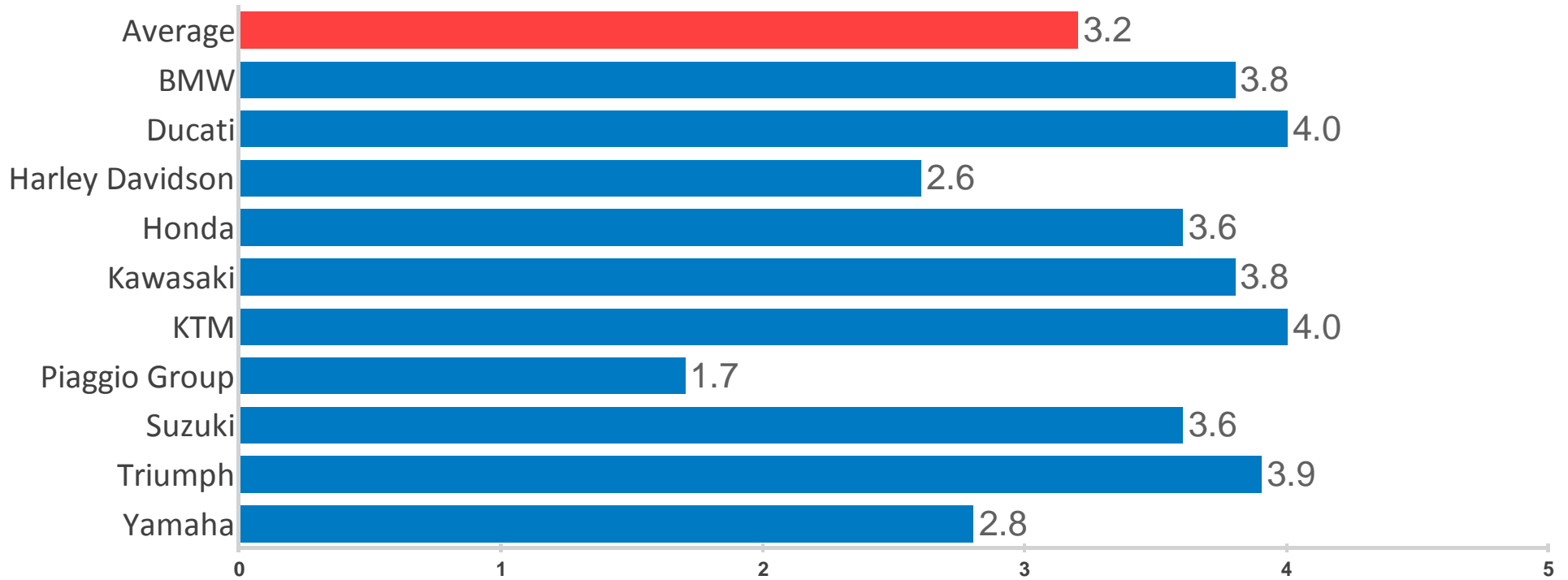


PREVIOUS SURVEY RESULTS – AUTUMN 2018

8c: Frequency of introduction of new models			
		Triumph	4.3
Harley Davidson	4.6	Yamaha	3.5
Honda	3.5		
Kawasaki	4.6		
KTM	4.3		
Piaggio Group	2.0		
Suzuki	2.5	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q8 d) Retail sales incentives and promotions

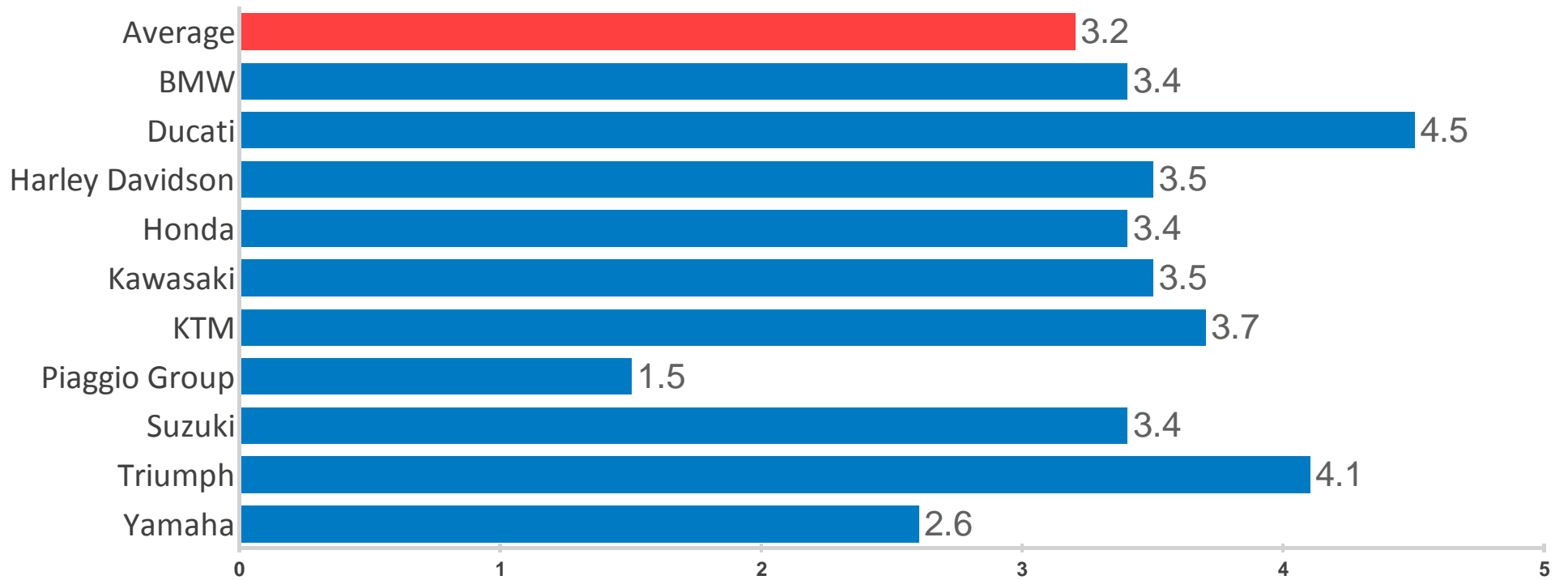


PREVIOUS SURVEY RESULTS – AUTUMN 2018

8d: Retail sales incentives and promotions			
		Triumph	3.8
Harley Davidson	3.6	Yamaha	3.0
Honda	3.1		
Kawasaki	4.3		
KTM	3.3		
Piaggio Group	2.2		
Suzuki	4.0	AVERAGE	3.3

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Q8 e) Product advertising

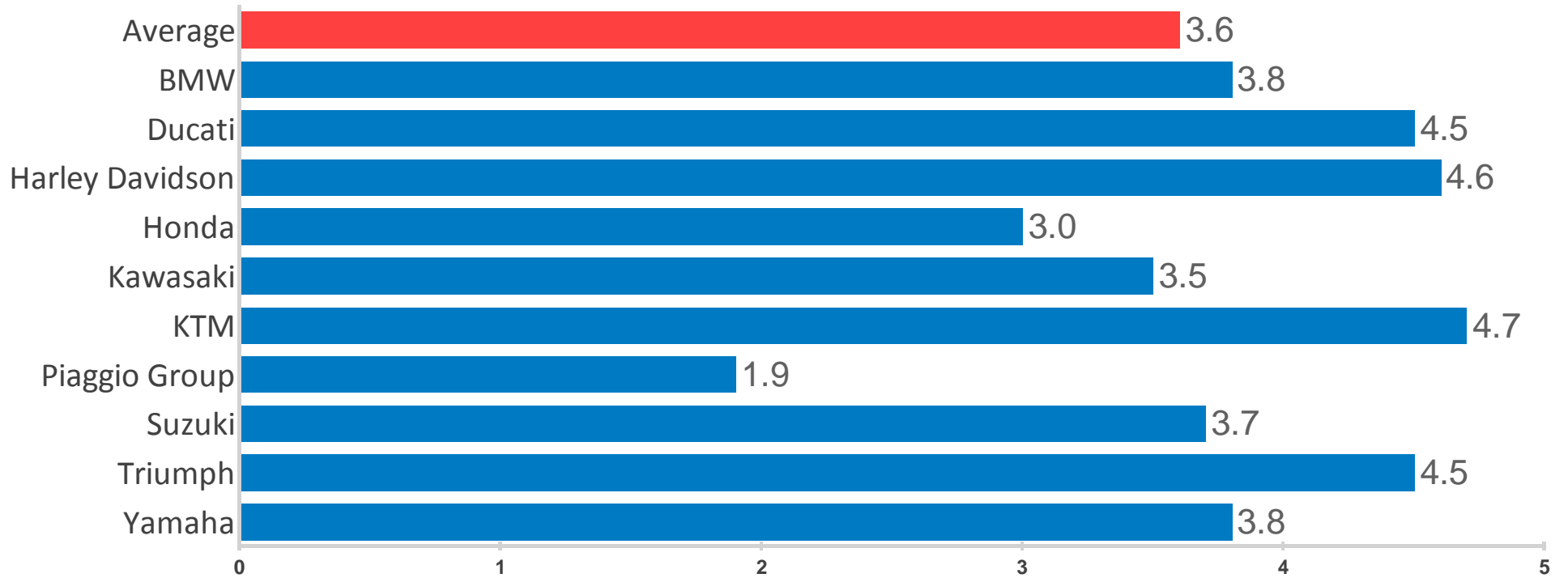


PREVIOUS SURVEY RESULTS – AUTUMN 2018

8e: Product advertising			
		Triumph	4.1
Harley Davidson	4.1	Yamaha	3.1
Honda	2.7		
Kawasaki	4.2		
KTM	3.6		
Piaggio Group	1.6		
Suzuki	3.9	AVERAGE	3.2

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

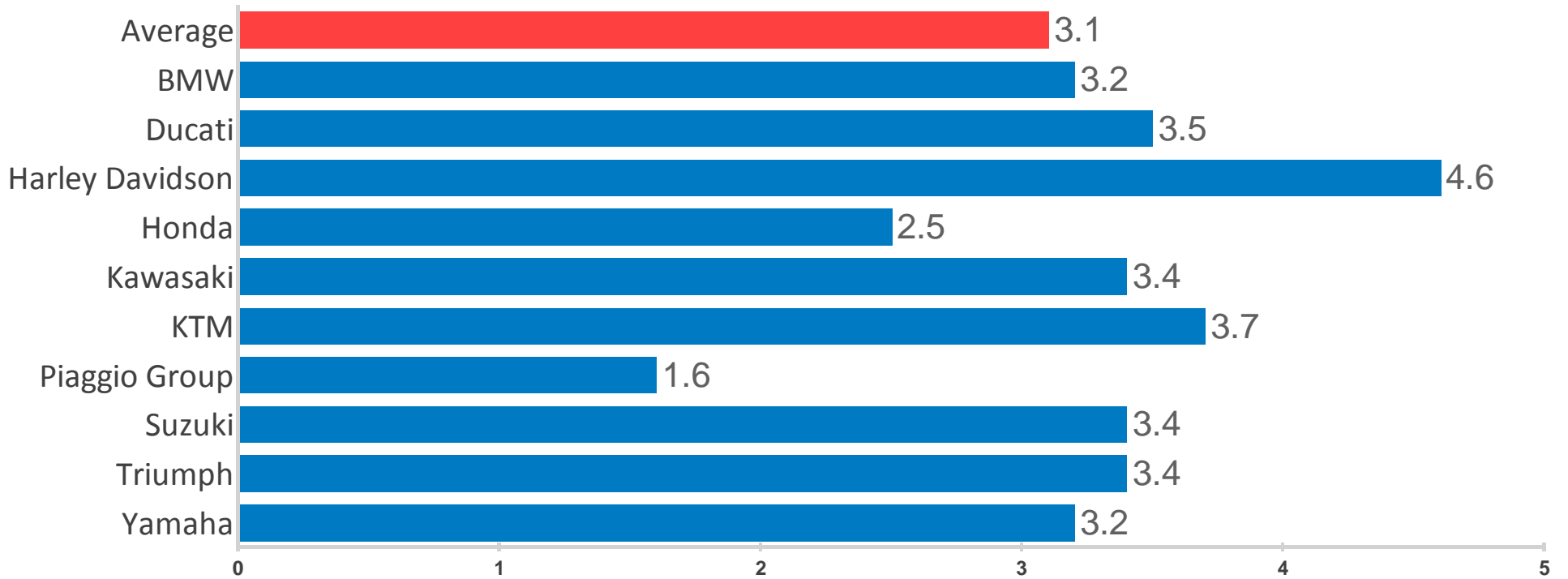


PREVIOUS SURVEY RESULTS – AUTUMN 2018

8f: Have a comprehensive accessory offering that appeals to customers			
		Triumph	4.5
Harley Davidson	4.9	Yamaha	3.7
Honda	2.2		
Kawasaki	3.7		
KTM	4.7		
Piaggio Group	2.7		
Suzuki	3.5	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

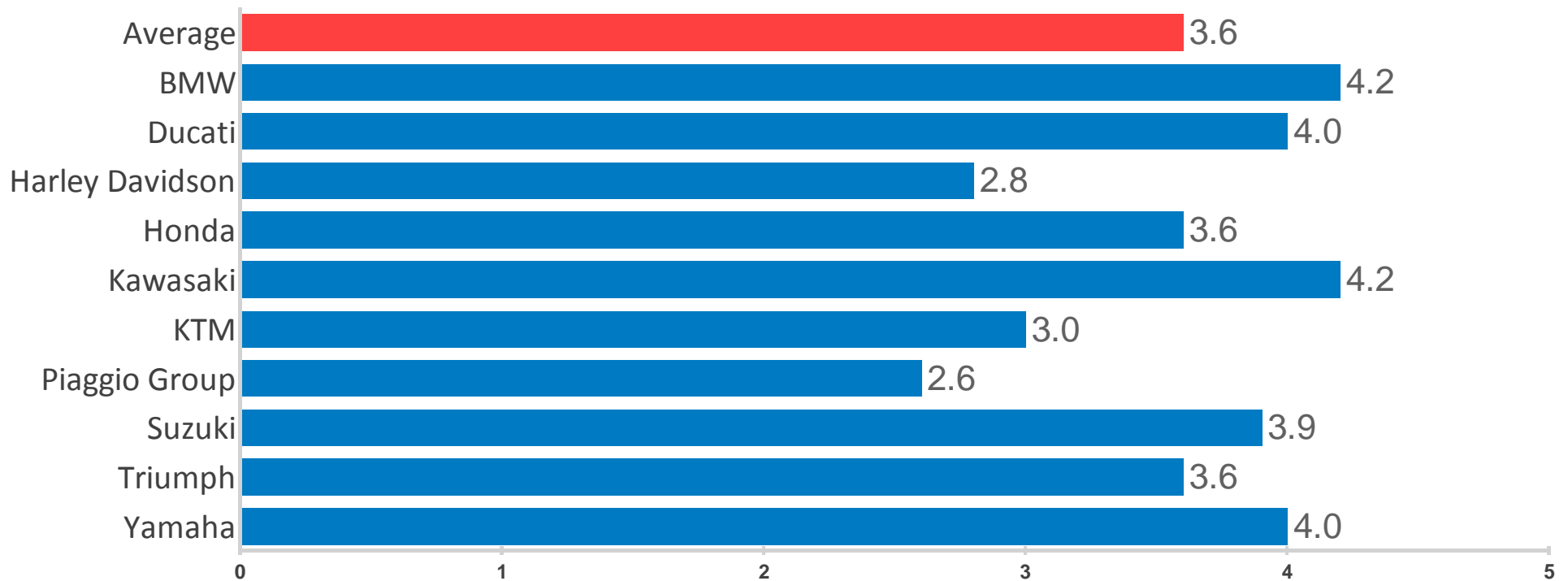


PREVIOUS SURVEY RESULTS – AUTUMN 2018

8g: Have a comprehensive clothing offering that appeals to customers			
		Triumph	2.8
Harley Davidson	4.7	Yamaha	3.0
Honda	1.7		
Kawasaki	3.0		
KTM	4.4		
Piaggio Group	2.0		
Suzuki	3.4	AVERAGE	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

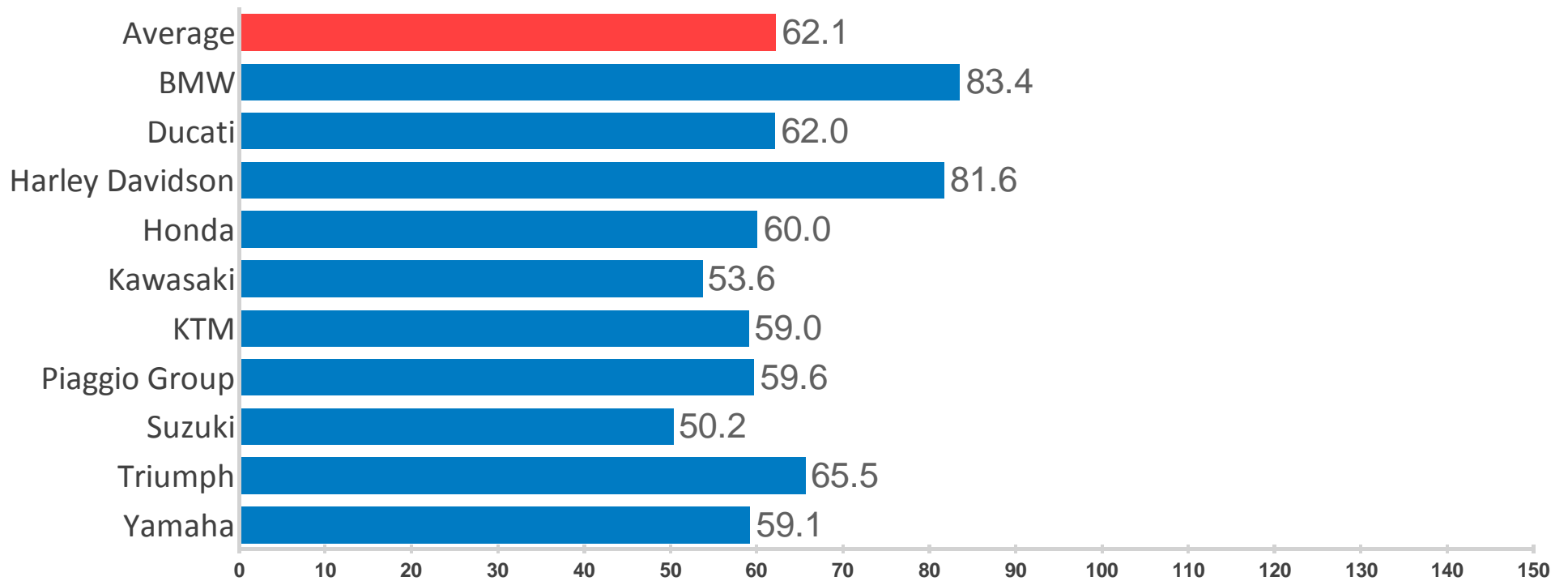


PREVIOUS SURVEY RESULTS – AUTUMN 2018

9: The fairness of your manufacturer's warranty policy			
		Triumph	4.0
Harley Davidson	3.4	Yamaha	4.0
Honda	3.4		
Kawasaki	4.5		
KTM	3.1		
Piaggio Group	3.6		
Suzuki	4.0	AVERAGE	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

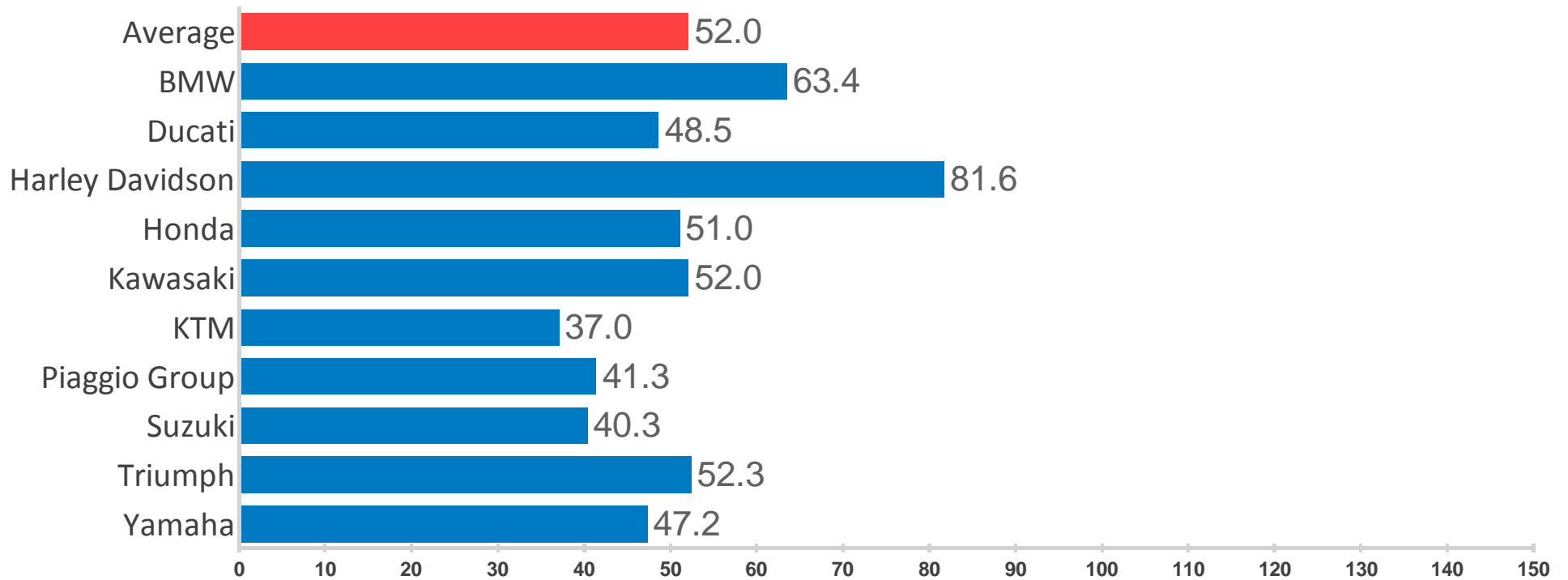


PREVIOUS SURVEY RESULTS – AUTUMN 2018

10: What is your labour rate for retail (£)			
		Triumph	62.6
Harley Davidson	78.3	Yamaha	58.9
Honda	54.2		
Kawasaki	54.3		
KTM	48.8		
Piaggio Group	61.2		
Suzuki	51.3	AVERAGE	57.8

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

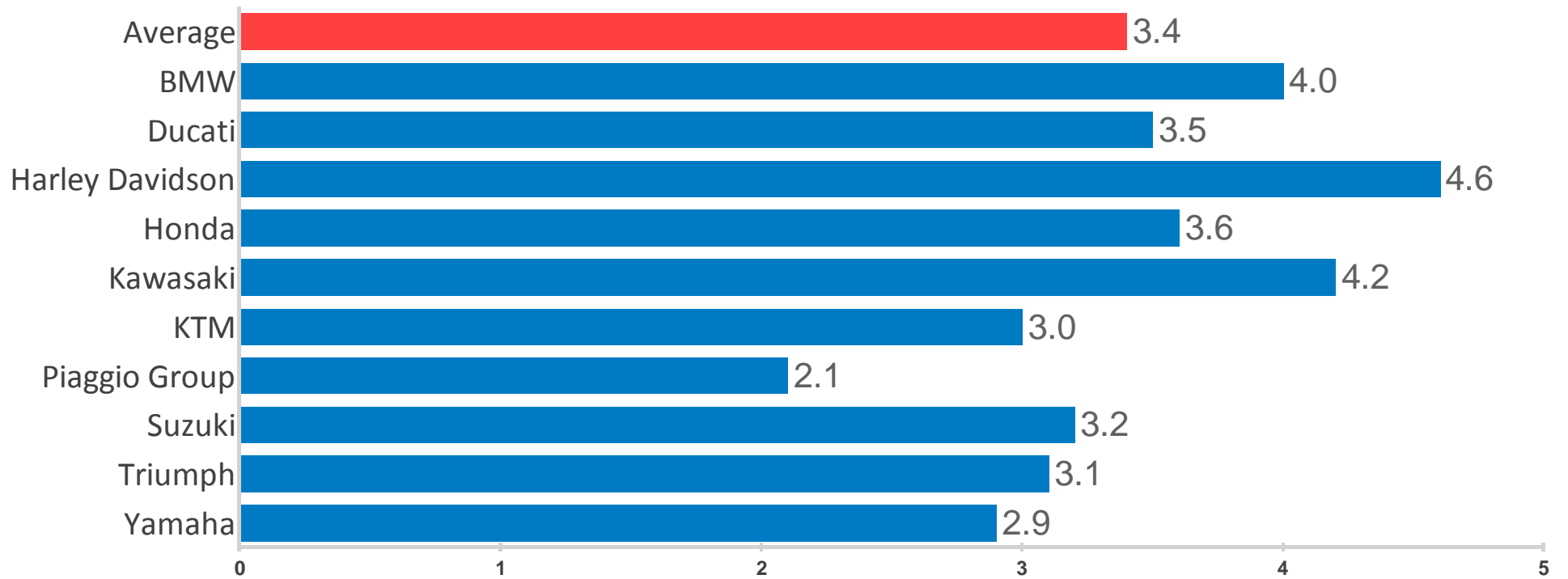


PREVIOUS SURVEY RESULTS – AUTUMN 2018

11. What is your labour rate for warranty (£)			
		Triumph	53.1
Harley Davidson	77.6	Yamaha	41.8
Honda	46.6		
Kawasaki	55.3		
KTM	36.6		
Piaggio Group	46.7		
Suzuki	40.7	AVERAGE	47.6

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Q12 a) Warranty labour rate

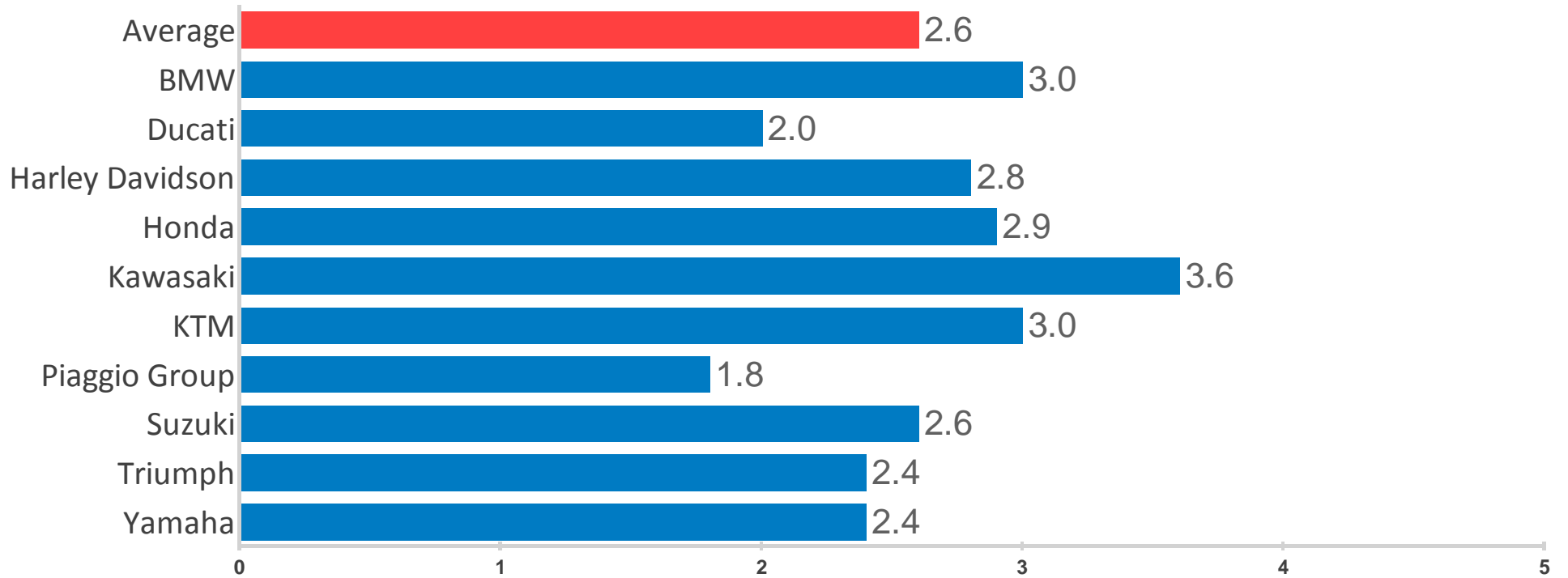


PREVIOUS SURVEY RESULTS – AUTUMN 2018

12a: Warranty labour rate			
		Triumph	3.4
Harley Davidson	4.9	Yamaha	2.3
Honda	2.7		
Kawasaki	4.5		
KTM	2.9		
Piaggio Group	3.2		
Suzuki	3.0	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q12 b) Warranty time allowances

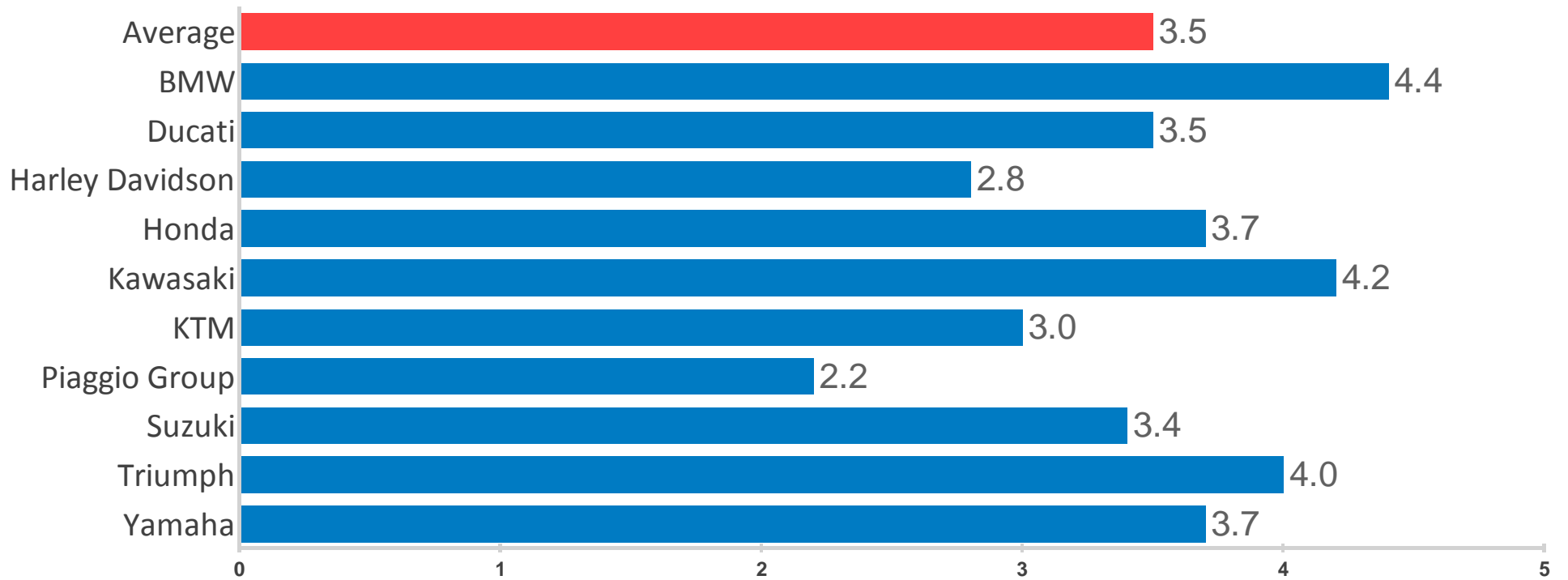


PREVIOUS SURVEY RESULTS – AUTUMN 2018

12b: Warranty time allowances			
		Triumph	2.1
Harley Davidson	3.3	Yamaha	2.4
Honda	2.5		
Kawasaki	3.5		
KTM	2.6		
Piaggio Group	2.5		
Suzuki	3.0	AVERAGE	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q12 c) Warranty replacement parts policy

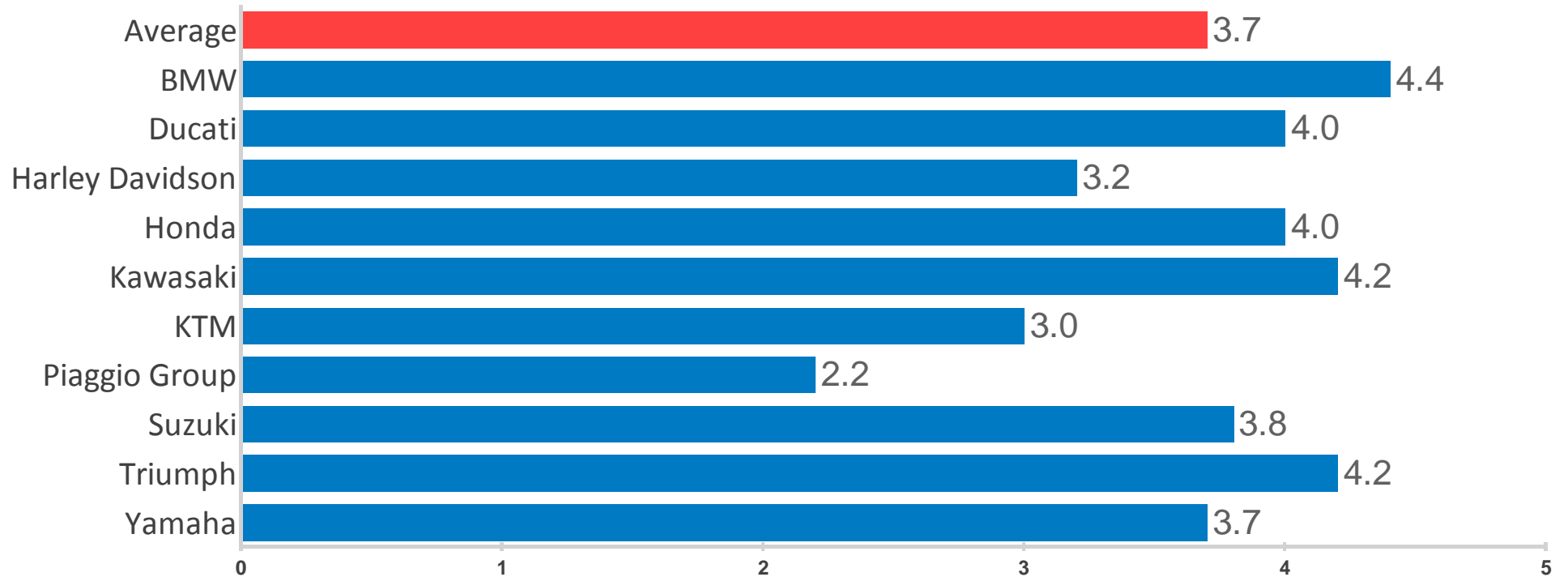


PREVIOUS SURVEY RESULTS – AUTUMN 2018

12c: Warranty replacement parts policy			
		Triumph	3.8
Harley Davidson	3.4	Yamaha	4.1
Honda	3.4		
Kawasaki	4.2		
KTM	3.4		
Piaggio Group	3.0		
Suzuki	3.9	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q12 d) Timely and fair settlement of warranty claims

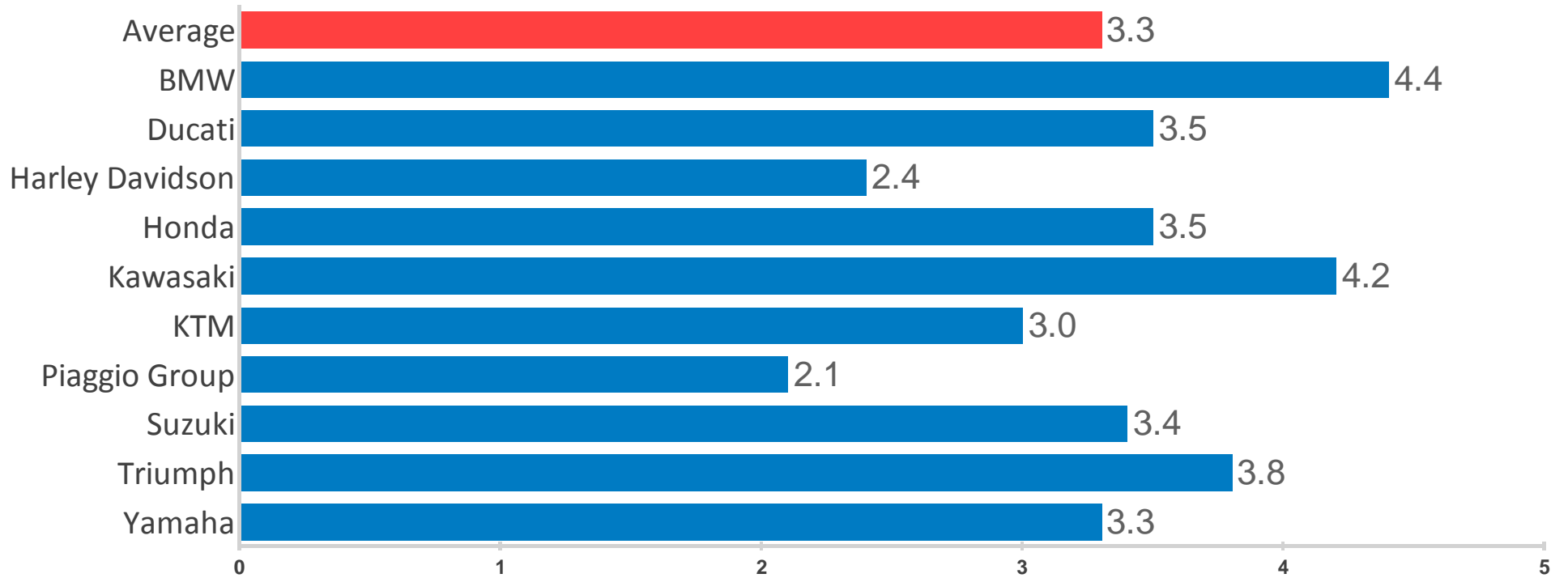


PREVIOUS SURVEY RESULTS – AUTUMN 2018

12d: Timely and fair settlement of warranty claims			
		Triumph	4.0
Harley Davidson	4.4	Yamaha	4.2
Honda	3.5		
Kawasaki	4.6		
KTM	3.3		
Piaggio Group	3.0		
Suzuki	4.1	AVERAGE	3.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q12 e) Quality and availability of technical support

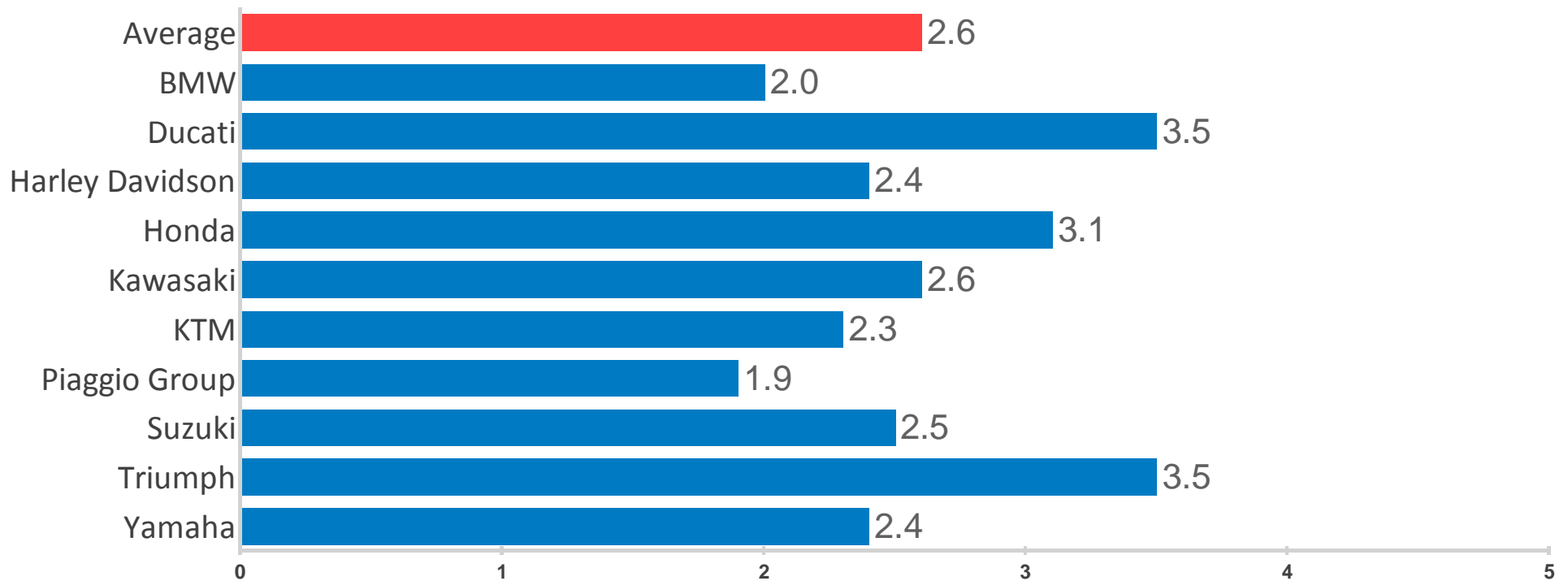


PREVIOUS SURVEY RESULTS – AUTUMN 2018

12e: Quality and availability of technical support			
		Triumph	3.8
Harley Davidson	2.9	Yamaha	3.6
Honda	3.0		
Kawasaki	4.5		
KTM	3.8		
Piaggio Group	3.1		
Suzuki	4.1	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

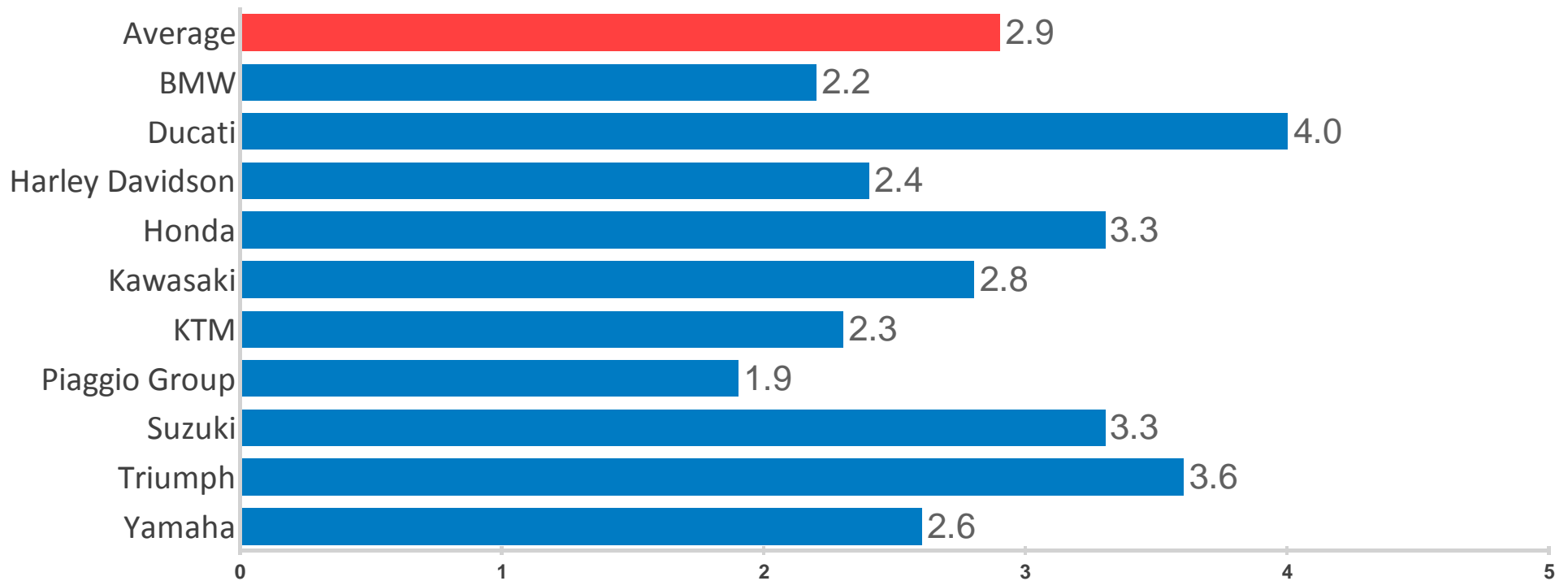


PREVIOUS SURVEY RESULTS – AUTUMN 2018

13: The profit return by representing your franchise			
		Triumph	3.3
Harley Davidson	3.8	Yamaha	2.4
Honda	2.5		
Kawasaki	3.6		
KTM	2.7		
Piaggio Group	2.4		
Suzuki	3.0	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q14 a) The future profitability of your business

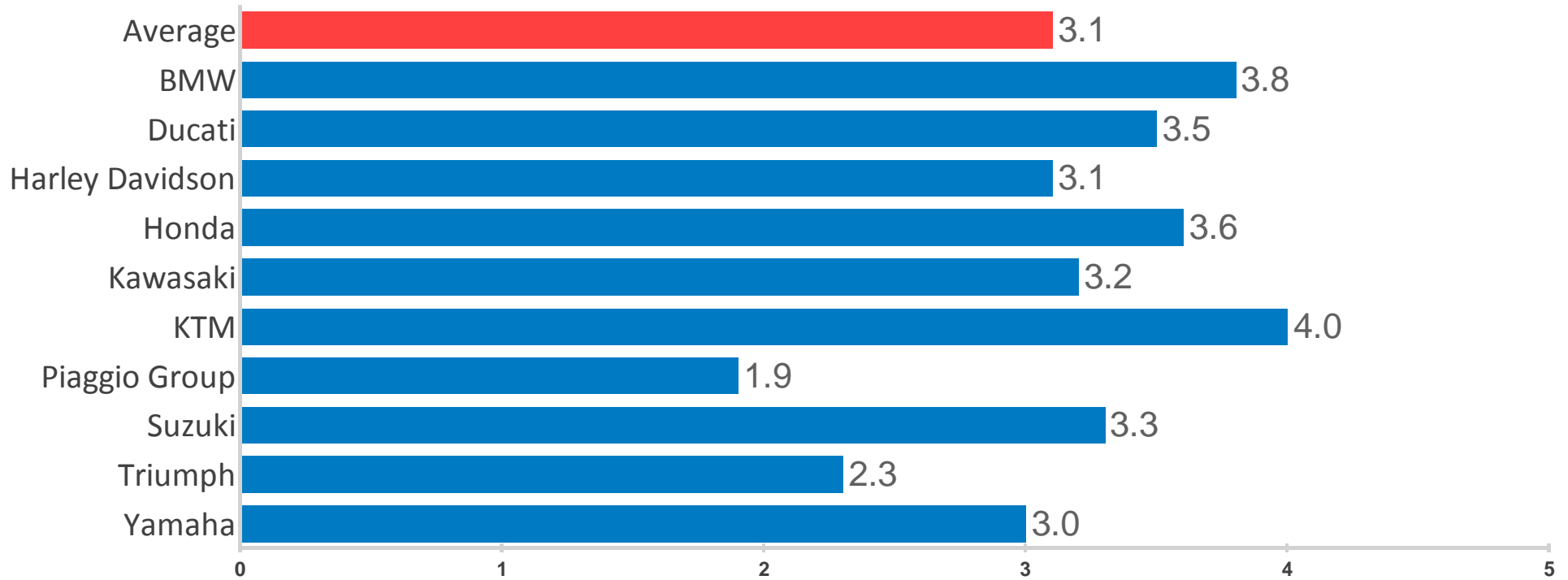


PREVIOUS SURVEY RESULTS – AUTUMN 2018

14a: The future profitability of your business			
		Triumph	3.4
Harley Davidson	4.3	Yamaha	2.6
Honda	2.8		
Kawasaki	3.5		
KTM	3.6		
Piaggio Group	2.4		
Suzuki	3.1	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q14 b) Your stocking plan for this franchise

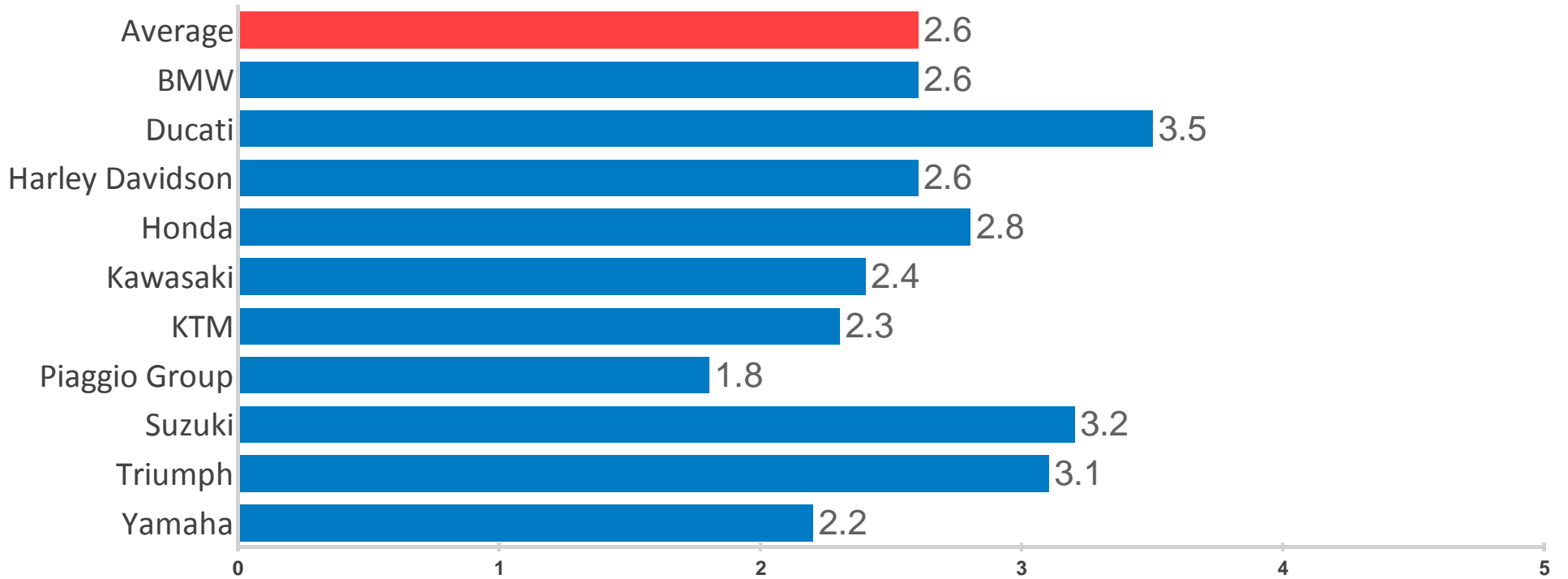


PREVIOUS SURVEY RESULTS – AUTUMN 2018

14b: Your stocking plan for this franchise			
		Triumph	2.6
Harley Davidson	4.1	Yamaha	2.7
Honda	3.2		
Kawasaki	4.1		
KTM	3.4		
Piaggio Group	2.7		
Suzuki	3.4	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q15 a) The dealer standards expected by your manufacturer

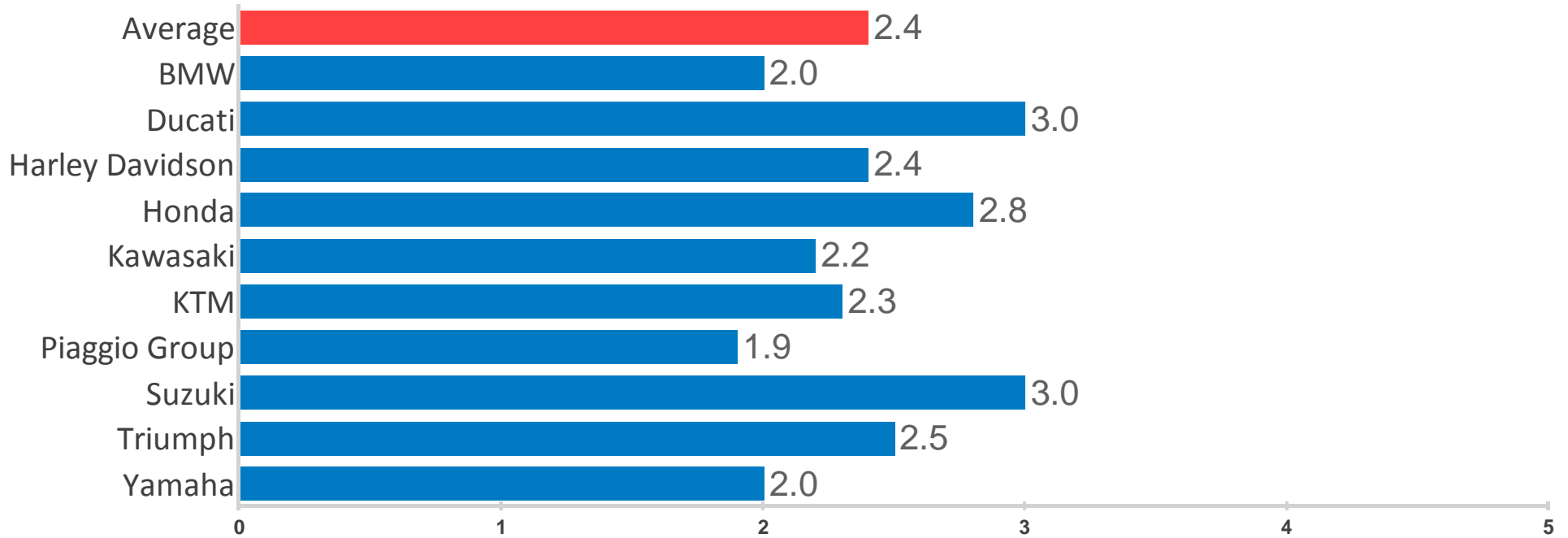


PREVIOUS SURVEY RESULTS – AUTUMN2018

15a: The dealer standards expected by your manufacturer			
		Triumph	2.4
Harley Davidson	4.3	Yamaha	2.2
Honda	2.8		
Kawasaki	2.9		
KTM	3.1		
Piaggio Group	2.7		
Suzuki	3.6	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

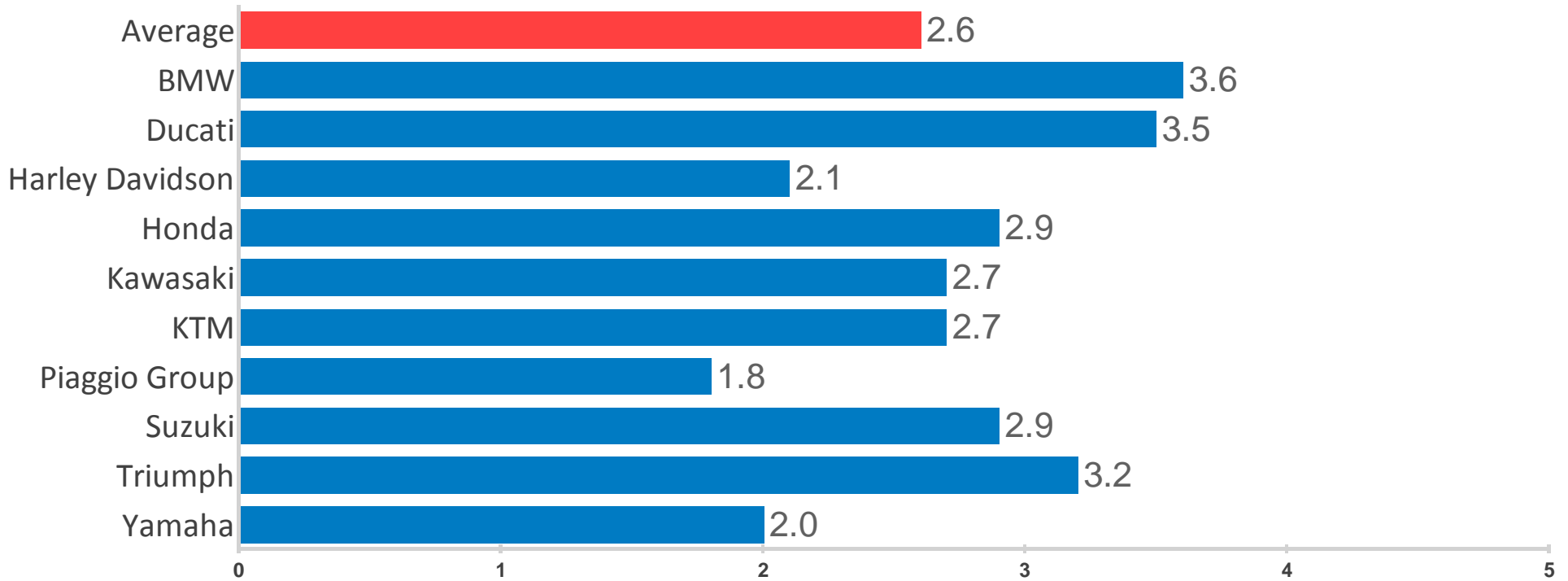


PREVIOUS SURVEY RESULTS – AUTUMN 2018

15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward			
		Triumph	2.1
Harley Davidson	4.2	Yamaha	2.0
Honda	2.5		
Kawasaki	2.9		
KTM	2.8		
Piaggio Group	2.5		
Suzuki	3.2	AVERAGE	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

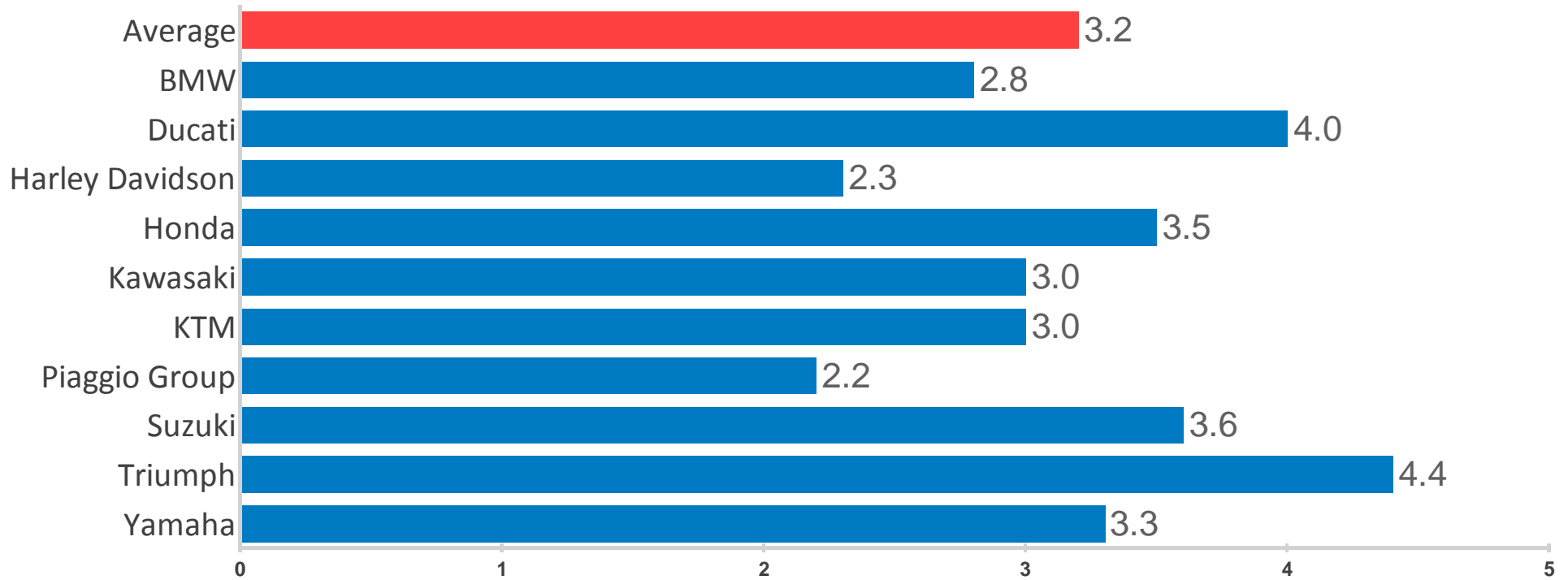


PREVIOUS SURVEY RESULTS – AUTUMN 2018

16a: That the management of your manufacturer takes dealers' views and opinions into account			
		Triumph	2.7
Harley Davidson	4.2	Yamaha	2.3
Honda	3.1		
Kawasaki	3.9		
KTM	2.4		
Piaggio Group	2.6		
Suzuki	3.7	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q16 b) The effectiveness of the field sales team

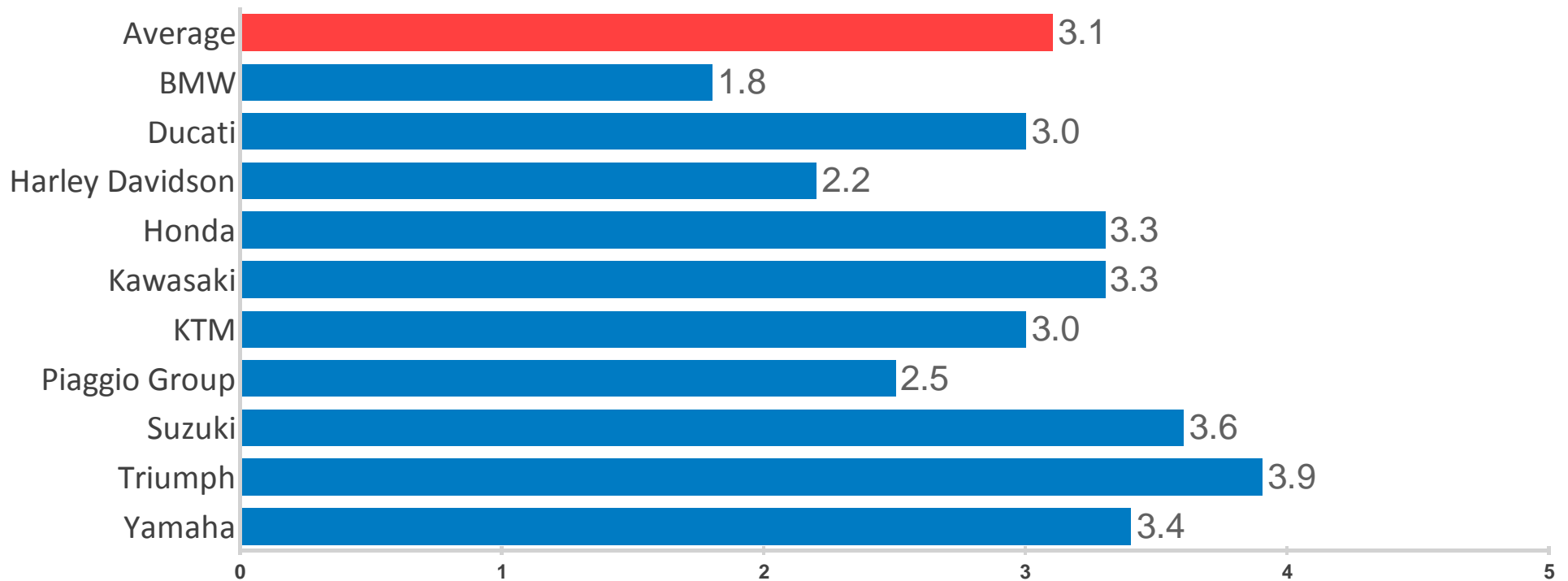


PREVIOUS SURVEY RESULTS – AUTUMN 2018

16b: The effectiveness of your field sales team			
		Triumph	4.0
Harley Davidson	4.9	Yamaha	3.2
Honda	3.1		
Kawasaki	4.5		
KTM	2.9		
Piaggio Group	2.6		
Suzuki	4.1	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

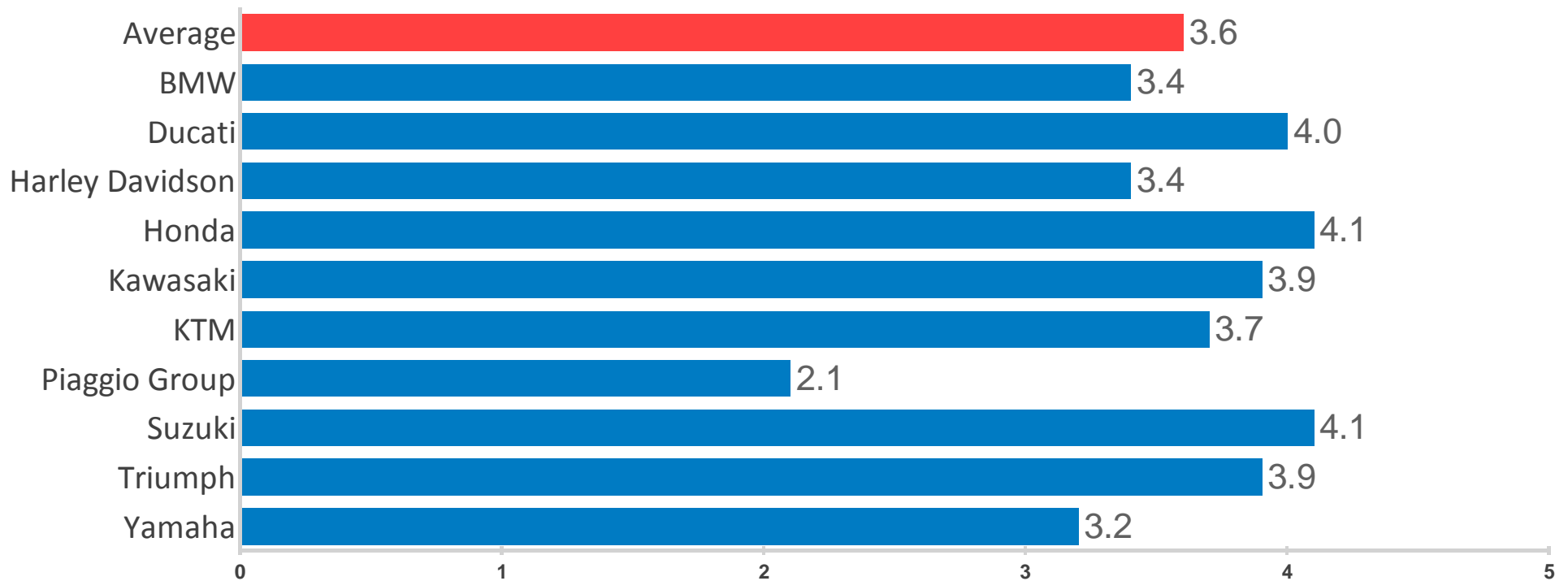


PREVIOUS SURVEY RESULTS – AUTUMN 2018

16c: The effectiveness of the field service and parts staff			
		Triumph	3.6
Harley Davidson	4.8	Yamaha	3.1
Honda	3.0		
Kawasaki	4.3		
KTM	3.4		
Piaggio Group	3.0		
Suzuki	4.1	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

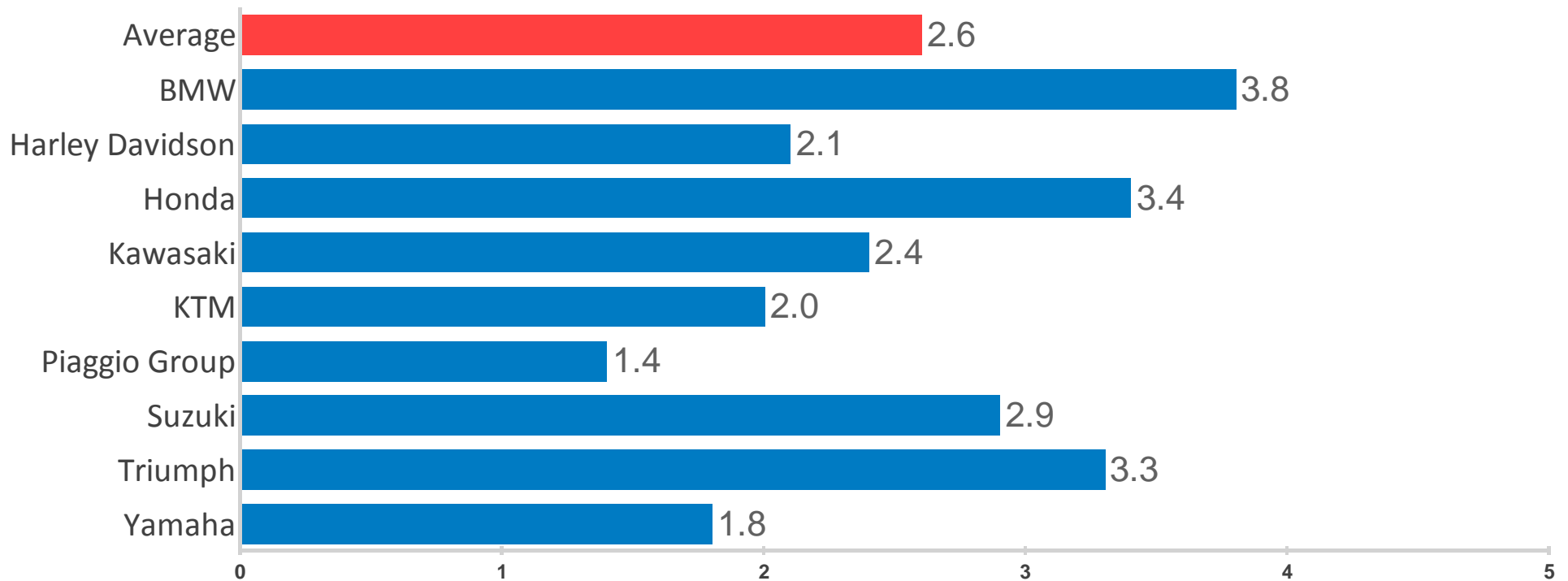


PREVIOUS SURVEY RESULTS – AUTUMN 2018

16d: The effectiveness of your manufacturer's retail finance programme			
		Triumph	3.8
Harley Davidson	3.7	Yamaha	3.0
Honda	3.5		
Kawasaki	4.6		
KTM	3.4		
Piaggio Group	2.8		
Suzuki	4.0	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

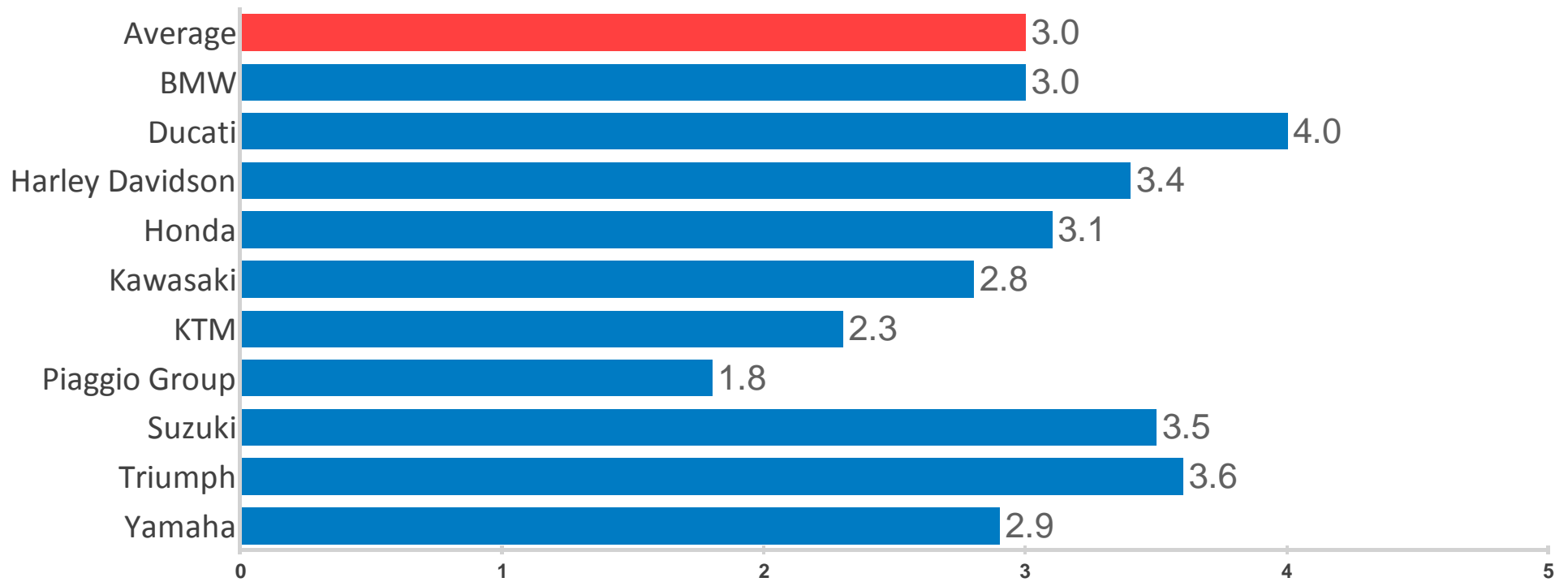


PREVIOUS SURVEY RESULTS – AUTUMN 2018

16e: The effectiveness of your dealer council and dealer forums			
		Triumph	2.7
Harley Davidson	3.1	Yamaha	2.0
Honda	3.3		
Kawasaki	2.9		
KTM	2.3		
Piaggio Group	2.8		
Suzuki	3.1	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q17 a) The routine procedures and controls expected

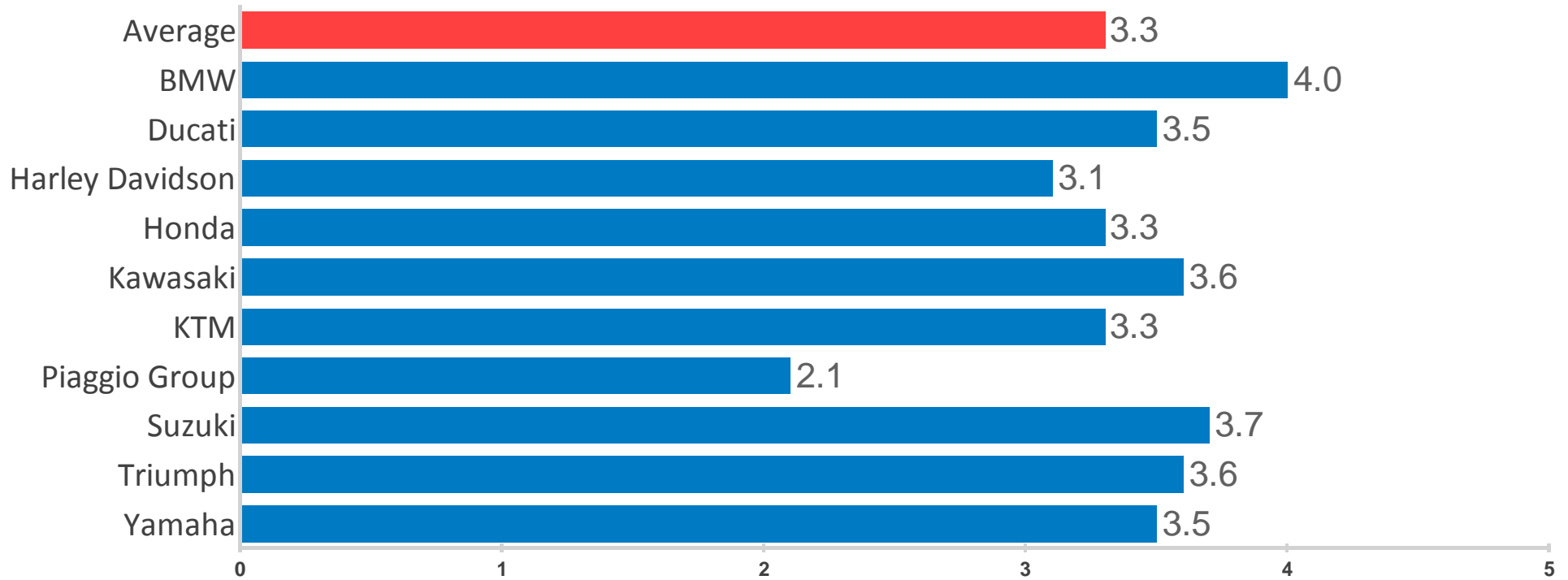


PREVIOUS SURVEY RESULTS – AUTUMN 2018

17a: The routine procedures and controls expected			
		Triumph	3.1
Harley Davidson	4.9	Yamaha	2.9
Honda	2.8		
Kawasaki	3.8		
KTM	3.3		
Piaggio Group	2.8		
Suzuki	3.8	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q17 b) The quality of your manufacturer's training

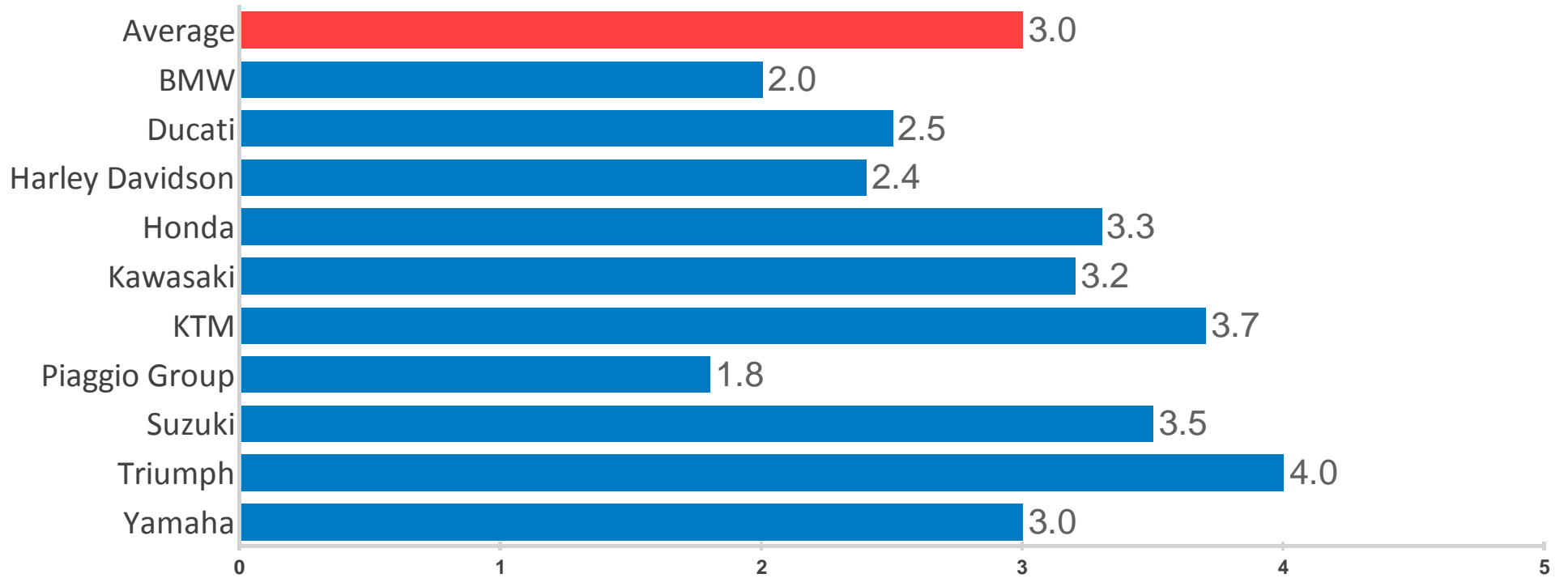


PREVIOUS SURVEY RESULTS – AUTUMN 2018

17b: The quality of your manufacturer's training			
		Triumph	3.6
Harley Davidson	4.6	Yamaha	3.8
Honda	3.0		
Kawasaki	4.0		
KTM	3.9		
Piaggio Group	2.6		
Suzuki	3.9	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

Q17 c) The cost of your manufacturer's training

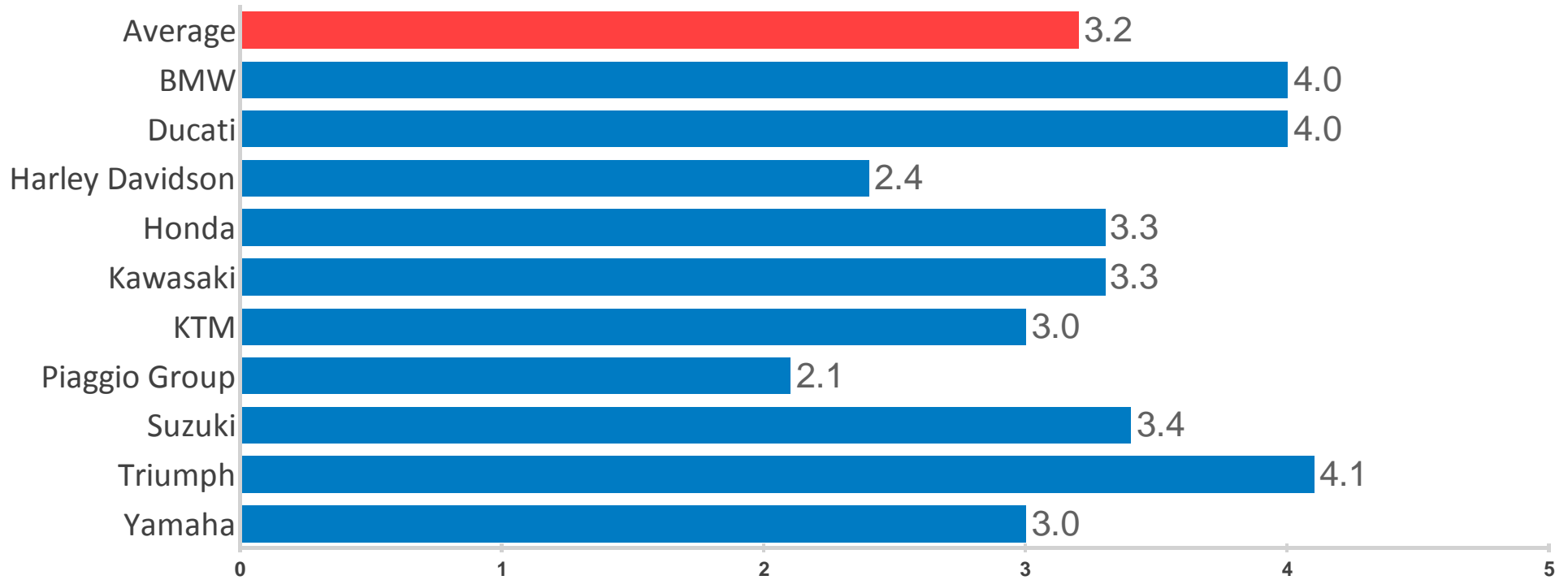


PREVIOUS SURVEY RESULTS – AUTUMN 2018

17c: The cost of your manufacturer's training			
		Triumph	3.7
Harley Davidson	3.8	Yamaha	3.4
Honda	3.0		
Kawasaki	3.4		
KTM	3.2		
Piaggio Group	2.4		
Suzuki	3.7	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

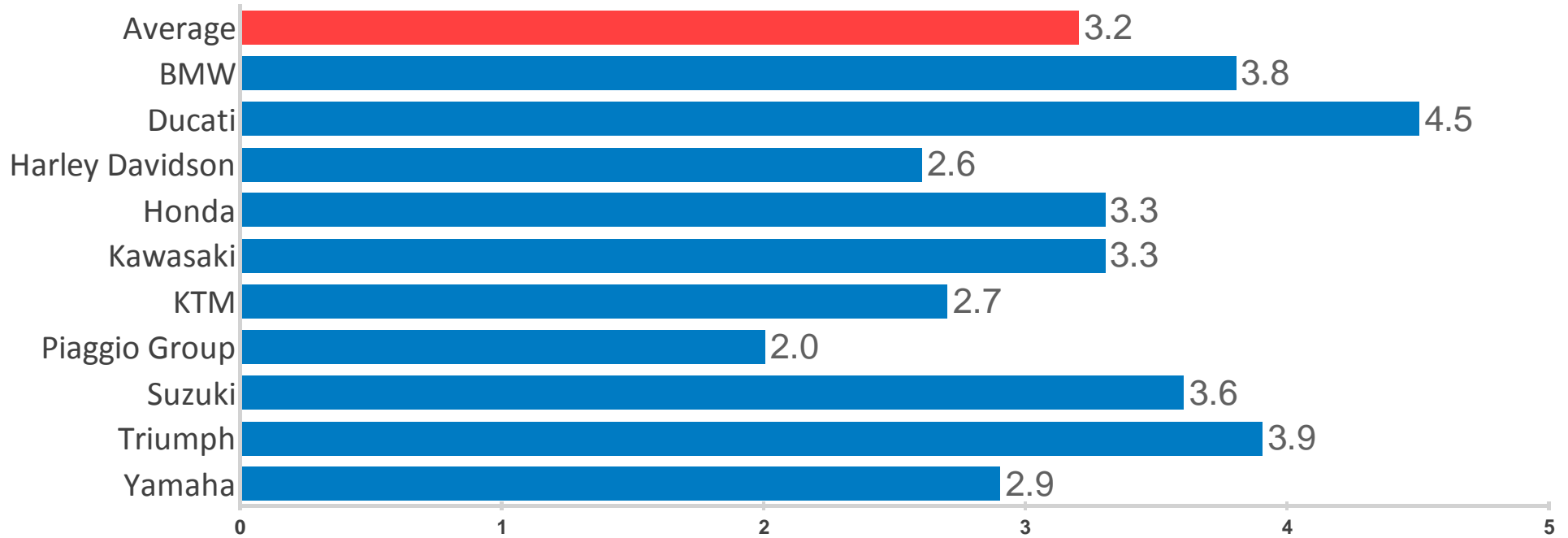


PREVIOUS SURVEY RESULTS – AUTUMN 2018

17d: Your ability to do business with your manufacturer on a day-to-day basis			
		Triumph	3.9
Harley Davidson	4.6	Yamaha	3.3
Honda	3.1		
Kawasaki	4.8		
KTM	3.8		
Piaggio Group	3.0		
Suzuki	4.0	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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

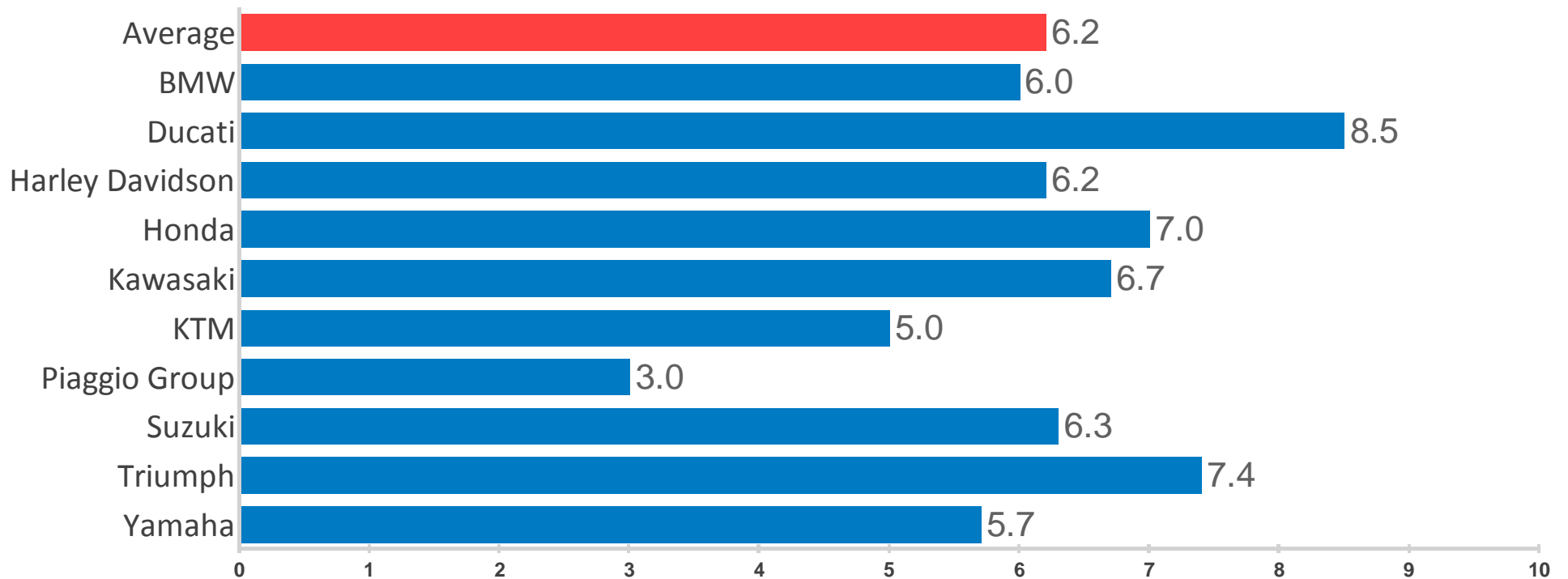


PREVIOUS SURVEY RESULTS – AUTUMN 2018

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process			
		Triumph	3.6
Harley Davidson	4.8	Yamaha	3.3
Honda	3.3		
Kawasaki	4.4		
KTM	3.4		
Piaggio Group	2.6		
Suzuki	4.1	AVERAGE	

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

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



PREVIOUS SURVEY RESULTS – AUTUMN 2018

18: Overall, how do you rate the value of holding your motorcycle franchise			
		Triumph	7.0
Harley Davidson	9.1	Yamaha	5.3
Honda	6.1		
Kawasaki	8.3		
KTM	6.7		
Piaggio Group	4.0		
Suzuki	6.6	AVERAGE	6.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 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			
Ducati	4.5	Suzuki	3.3	Ducati	4.5	Harley Davidson	2.4
Honda	3.7	KTM	3.0	Triumph	3.3	BMW	2.3
Harley Davidson	3.6	Piaggio Group	2.5	Honda	3.1	Kawasaki	2.1
Triumph	3.6			KTM	3.0		
BMW	3.4			Suzuki	2.9		
Yamaha	3.4			Yamaha	2.7		
Kawasaki	3.3	Average	3.4	Piaggio Group	2.5	Average	2.8

7a: Your manufacturer's policy for the supply and stocking of motorcycles				7b: The new motorcycle target negotiating process			
Ducati	4.0	KTM	3.0	Ducati	3.5	KTM	2.3
Honda	3.7	Triumph	2.3	Suzuki	3.4	Kawasaki	2.0
BMW	3.4	Piaggio Group	1.9	BMW	2.8	Piaggio Group	1.9
Suzuki	3.3			Yamaha	2.7		
Kawasaki	3.2			Harley Davidson	2.6		
Harley Davidson	3.1			Honda	2.6		
Yamaha	3.1	Average	3.1	Triumph	2.6	Average	2.6

7c: What is your annual target for this brand				8a: The brand image			
BMW	377.0	Piaggio Group	93.0	Ducati	5.0	Suzuki	3.8
KTM	260.0	Ducati	90.0	Triumph	4.6	Yamaha	3.8
Harley Davidson	259.8	Suzuki	81.3	BMW	4.4	Piaggio Group	2.1
Honda	243.9			Harley Davidson	4.4		
Triumph	229.9			KTM	4.3		
Yamaha	153.2			Honda	4.2		
Kawasaki	151.9	Average	187.1	Kawasaki	4.0	Average	3.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

8b: The product image				8c: Frequency of introduction of new models			
Ducati	5.0	Yamaha	3.6	Ducati	4.5	Yamaha	3.2
Triumph	4.6	Suzuki	3.3	KTM	4.3	Suzuki	2.6
BMW	4.4	Piaggio Group	2.2	BMW	4.2	Piaggio Group	1.7
KTM	4.3			Kawasaki	4.2		
Harley Davidson	4.1			Triumph	4.2		
Honda	4.1			Honda	3.7		
Kawasaki	4.0	Average	3.8	Harley Davidson	3.4	Average	3.4

8d: Retail sales incentives and promotions				8e: Product advertising			
Ducati	4.0	Yamaha	2.8	Ducati	4.5	Suzuki	3.4
KTM	4.0	Harley Davidson	2.6	Triumph	4.1	Yamaha	2.6
Triumph	3.9	Piaggio Group	1.7	KTM	3.7	Piaggio Group	1.5
BMW	3.8			Harley Davidson	3.5		
Kawasaki	3.8			Kawasaki	3.5		
Honda	3.6			BMW	3.4		
Suzuki	3.6	Average	3.2	Honda	3.4	Average	3.2

8f: Have a comprehensive accessory offering that appeals to customers				8g: Have a comprehensive clothing offering that appeals to customers			
KTM	4.7	Kawasaki	3.5	Harley Davidson	4.6	Yamaha	3.2
Harley Davidson	4.6	Honda	3.0	KTM	3.7	Honda	2.5
Ducati	4.5	Piaggio Group	1.9	Ducati	3.5	Piaggio Group	1.6
Triumph	4.5			Kawasaki	3.4		
BMW	3.8			Suzuki	3.4		
Yamaha	3.8			Triumph	3.4		
Suzuki	3.7	Average	3.6	BMW	3.2	Average	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

9: Your manufacturer's warranty policy				10: What is your labour rate for retail before VAT (£)			
BMW	4.2	KTM	3.0	BMW	83.4	KTM	59.0
Kawasaki	4.2	Harley Davidson	2.8	Harley Davidson	81.6	Kawasaki	53.6
Ducati	4.0	Piaggio Group	2.6	Triumph	65.5	Suzuki	50.2
Yamaha	4.0			Ducati	62.0		
Suzuki	3.9			Honda	60.0		
Honda	3.6			Piaggio Group	59.6		
Triumph	3.6	Average	3.6	Yamaha	59.1	Average	62.1

11: What is your labour rate for warranty before VAT (£)				12a: Warranty labour rate			
Harley Davidson	81.6	Piaggio Group	41.3	Harley Davidson	4.6	Triumph	3.1
BMW	63.4	Suzuki	40.3	Kawasaki	4.2	Yamaha	2.9
Triumph	52.3	KTM	37.0	BMW	4.0	Piaggio Group	2.1
Kawasaki	52.0			Honda	3.6		
Honda	51.0			Ducati	3.5		
Ducati	48.5			Suzuki	3.2		
Yamaha	47.2	Average	52.0	KTM	3.0	Average	3.4

12b: Warranty replacement parts policy				12c: Warranty time allowances			
Kawasaki	3.6	Yamaha	2.4	BMW	4.4	KTM	3.0
BMW	3.0	Ducati	2.0	Kawasaki	4.2	Harley Davidson	2.8
KTM	3.0	Piaggio Group	1.8	Triumph	4.0	Piaggio Group	2.2
Honda	2.9			Honda	3.7		
Harley Davidson	2.8			Yamaha	3.7		
Suzuki	2.6			Ducati	3.5		
Triumph	2.4	Average	2.6	Suzuki	3.4	Average	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

12d: Timely and fair settlement of warranty claims				12e: Quality and availability of technical support			
BMW	4.4	Harley Davidson	3.2	BMW	4.4	KTM	3.0
Kawasaki	4.2	KTM	3.0	Kawasaki	4.2	Harley Davidson	2.4
Triumph	4.2	Piaggio Group	2.2	Triumph	3.8	Piaggio Group	2.1
Ducati	4.0			Ducati	3.5		
Honda	4.0			Honda	3.5		
Suzuki	3.8			Suzuki	3.4		
Yamaha	3.7	Average	3.7	Yamaha	3.3	Average	3.3

13: The profit return by representing your franchise				14a: The future profitability of your business			
Ducati	3.5	KTM	2.3	Ducati	4.0	KTM	2.3
Triumph	3.5	BMW	2.0	Triumph	3.6	BMW	2.2
Honda	3.1	Piaggio Group	1.9	Honda	3.3	Piaggio Group	1.9
Kawasaki	2.6			Suzuki	3.3		
Suzuki	2.5			Kawasaki	2.8		
Harley Davidson	2.4			Yamaha	2.6		
Yamaha	2.4	Average	2.6	Harley Davidson	2.4	Average	2.9

14b: Your stocking plan for this franchise				15a: The dealer standards expected by your manufacturer			
KTM	4.0	Yamaha	3.0	Ducati	3.5	KTM	2.3
BMW	3.8	Triumph	2.3	Suzuki	3.2	Yamaha	2.2
Honda	3.6	Piaggio Group	1.9	Triumph	3.1	Piaggio Group	1.8
Ducati	3.5			Honda	2.8		
Suzuki	3.3			BMW	2.6		
Kawasaki	3.2			Harley Davidson	2.6		
Harley Davidson	3.1	Average	3.1	Kawasaki	2.4	Average	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 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			
Ducati	3.0	BMW	2.0	BMW	3.6	Harley Davidson	2.1
Suzuki	3.0	Yamaha	2.0	Ducati	3.5	Yamaha	2.0
Honda	2.8	Piaggio Group	1.9	Triumph	3.2	Piaggio Group	1.8
Triumph	2.5			Honda	2.9		
Harley Davidson	2.4			Suzuki	2.9		
KTM	2.3			Kawasaki	2.7		
Kawasaki	2.2	Average	2.4	KTM	2.7	Average	2.6

16b: The effectiveness of your field sales team				16c: The effectiveness of the field service and parts staff			
Triumph	4.4	BMW	2.8	Triumph	3.9	Piaggio Group	2.5
Ducati	4.0	Harley Davidson	2.3	Suzuki	3.6	Harley Davidson	2.2
Suzuki	3.6	Piaggio Group	2.2	Yamaha	3.4	BMW	1.8
Honda	3.5			Honda	3.3		
Yamaha	3.3			Kawasaki	3.3		
Kawasaki	3.0			Ducati	3.0		
KTM	3.0	Average	3.2	KTM	3.0	Average	3.1

16d: The effectiveness of your manufacturer's retail finance programme				16e: The effectiveness of your dealer council and dealer forums			
Honda	4.1	Harley Davidson	3.4	BMW	3.8	Yamaha	1.8
Suzuki	4.1	Yamaha	3.2	Honda	3.4	Piaggio Group	1.4
Ducati	4.0	Piaggio Group	2.1	Triumph	3.3		
KTM	3.9			Suzuki	2.9		
Triumph	3.9			Kawasaki	2.4		
KTM	3.7			Harley Davidson	2.1		
BMW	3.4	Average	3.6	KTM	2.0	Average	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2019 SURVEY

17a: The routine procedures and controls expected				17b: The quality of your manufacturer's training			
Ducati	4.0	Kawasaki	2.8	BMW	4.0	KTM	3.3
Triumph	3.6	KTM	2.3	Suzuki	3.7	Harley Davidson	3.1
Suzuki	3.5	Piaggio Group	1.8	Kawasaki	3.6	Piaggio Group	2.1
Harley Davidson	3.4			Triumph	3.6		
Honda	3.1			Ducati	3.5		
BMW	3.0			Yamaha	3.5		
Yamaha	2.9	Average	3.0	Honda	3.3	Average	3.3

17c: The cost of your manufacturer's training				17d: Your ability to do business with your manufacturer on a day-to-day basis			
Triumph	4.0	Harley Davidson	2.4	Triumph	4.1	Yamaha	3.0
KTM	3.7	BMW	2.0	BMW	4.0	Harley Davidson	2.4
Suzuki	3.5	Piaggio Group	1.8	Ducati	4.0	Piaggio Group	2.1
Honda	3.3			Suzuki	3.4		
Kawasaki	3.2			Honda	3.3		
Yamaha	3.0			Kawasaki	3.3		
Ducati	2.5	Average	3.0	KTM	3.0	Average	3.2

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			
Ducati	4.5	KTM	2.7	Ducati	8.5	Yamaha	5.7
Triumph	3.9	Harley Davidson	2.6	Triumph	7.4	KTM	5.0
BMW	3.8	Piaggio Group	2.0	Honda	7.0	Piaggio Group	5.0
Suzuki	3.6			Kawasaki	6.7		
Honda	3.3			Suzuki	6.3		
Kawasaki	3.3			Harley Davidson	6.2		
Yamaha	2.9	Average	3.2	BMW	6.0	Average	6.2