



**NATIONAL MOTORCYCLE DEALERS ASSOCIATION
DEALER ATTITUDE SURVEY RESULTS**

Spring 2020

NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY SPRING 2020

We are pleased to reveal the findings of the latest Motorcycle Dealer Attitude Survey conducted in April 2020 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 have been produced on a simple five-point scale, ranging from 1 - very dissatisfied/very poor to 5 - very satisfied/very good (question 18 is rated from 1 - very poor to 10 - excellent).

The majority of respondents for the Spring 2020 Dealer Attitude Survey were from small owner/ driver businesses. This explains the trends recorded in the number of new and used bikes sold per annum.

As this edition of the survey was conducted just as the UK was placed into lockdown, as a result of the Covid-19 crisis, the overall response rate was slightly dampened at 20%, compared to the usual rate of 25%. Further to that, some brands recorded low response rates, such as Kawasaki at 7% and Royal Enfield at 9%, meaning that the results produced from them could be skewed and unbalanced, in comparison to the general opinion in the survey.

Due to lack of participation, there were no recorded responses for BMW resulting in the brand having N/A scores on the graphs.

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

NB:

National Motorcycle Dealers Association

May 2020

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NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY



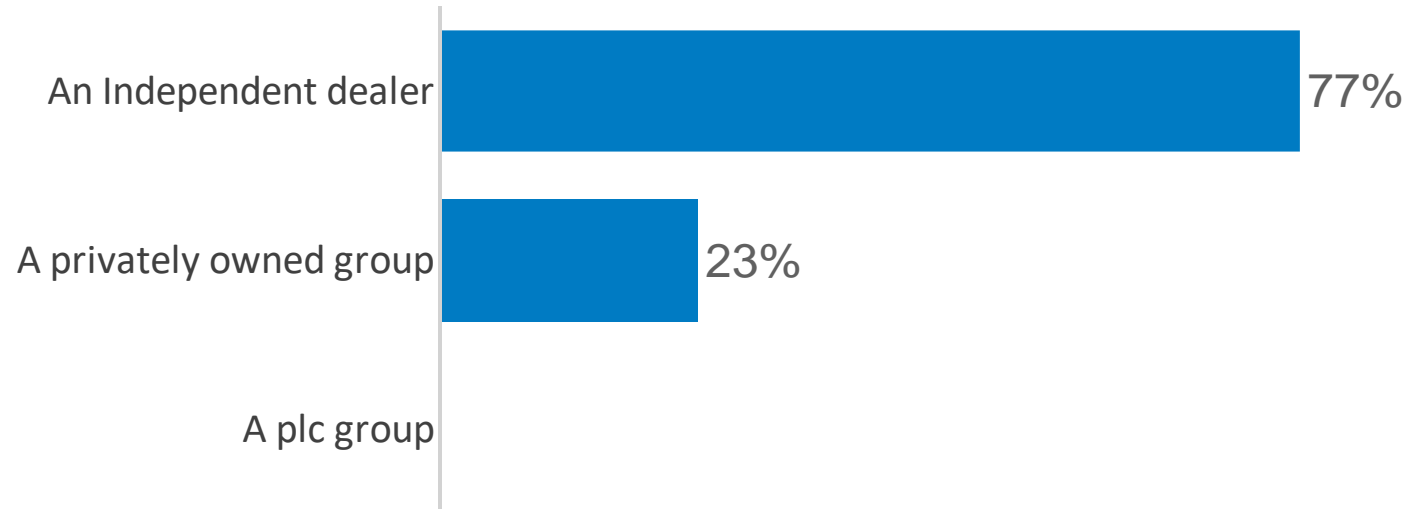
NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

BREAKDOWN OF RESPONSES

FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
DUCATI	7	30	23
HARLEY DAVIDSON	5	41	12
HONDA	17	73	23
KAWASAKI	4	60	7
KTM	7	49	14
PIAGGIO GROUP	23	56	41
ROYAL ENFIELD	5	57	9
SUZUKI	24	71	34
TRIUMPH	5	49	10
YAMAHA	15	79	19
TOTAL	112	565	20

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q2 In this site are you:

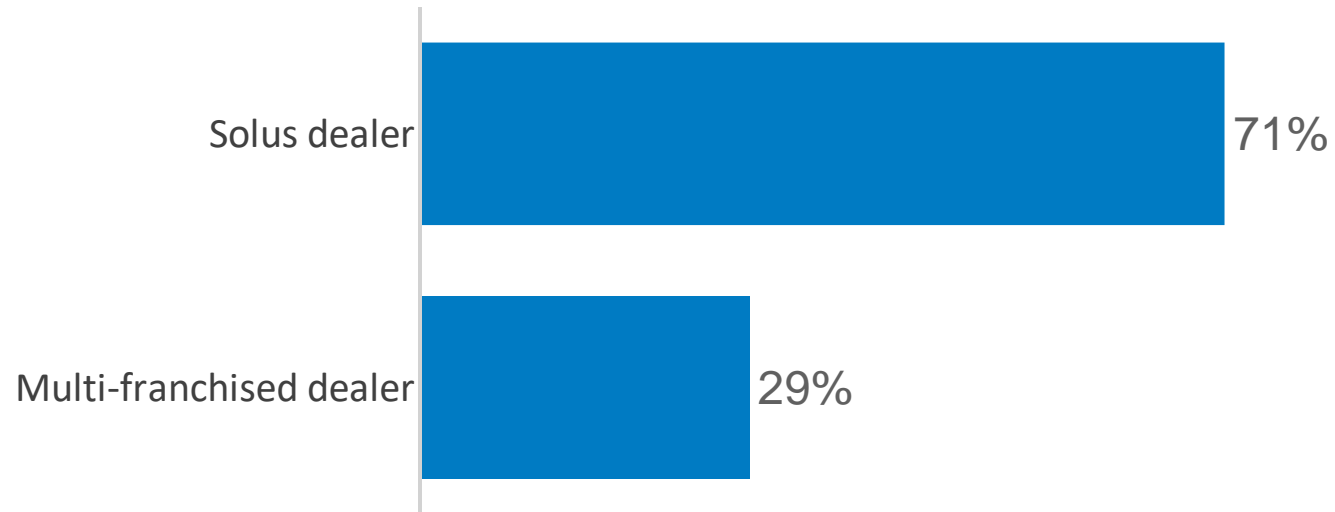


AUTUMN 2019 SURVEY RESULTS

INDEPENDENT	82%
PRIVATELY OWNED	16%
PLC GROUP	2%

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

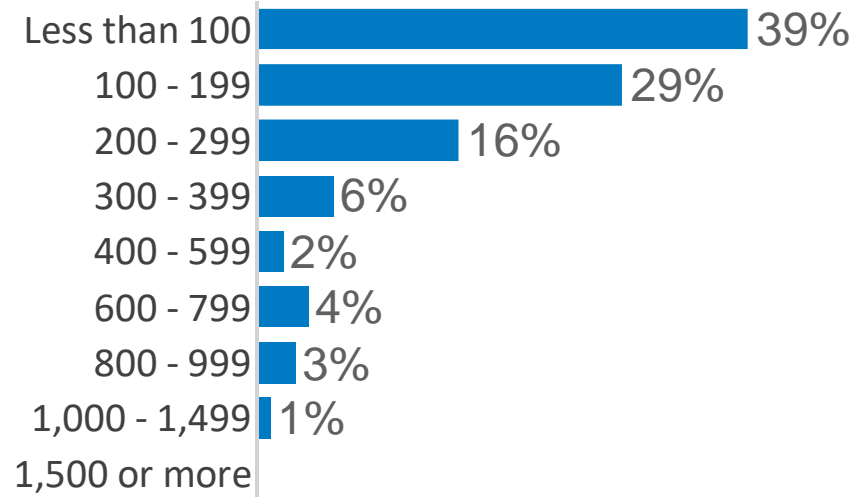
Q3 Is this site:



AUTUMN 2019 SURVEY RESULTS	
SOLUS	52%
MULTI-FRANCHISED	48%

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

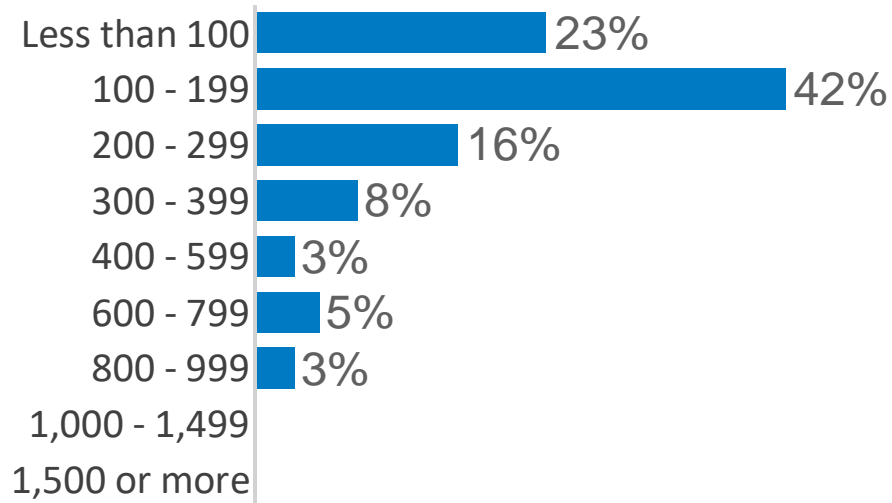
Q4 How many new motorcycles do you sell per annum?



AUTUMN 2019 SURVEY RESULTS			
Less than 100	28%	400 – 599	3%
100 – 199	39%	600 – 799	1%
200 – 299	14%	800 – 999	1%
300 – 399	14%	1000 – 1499	0%
1500 or more	0%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

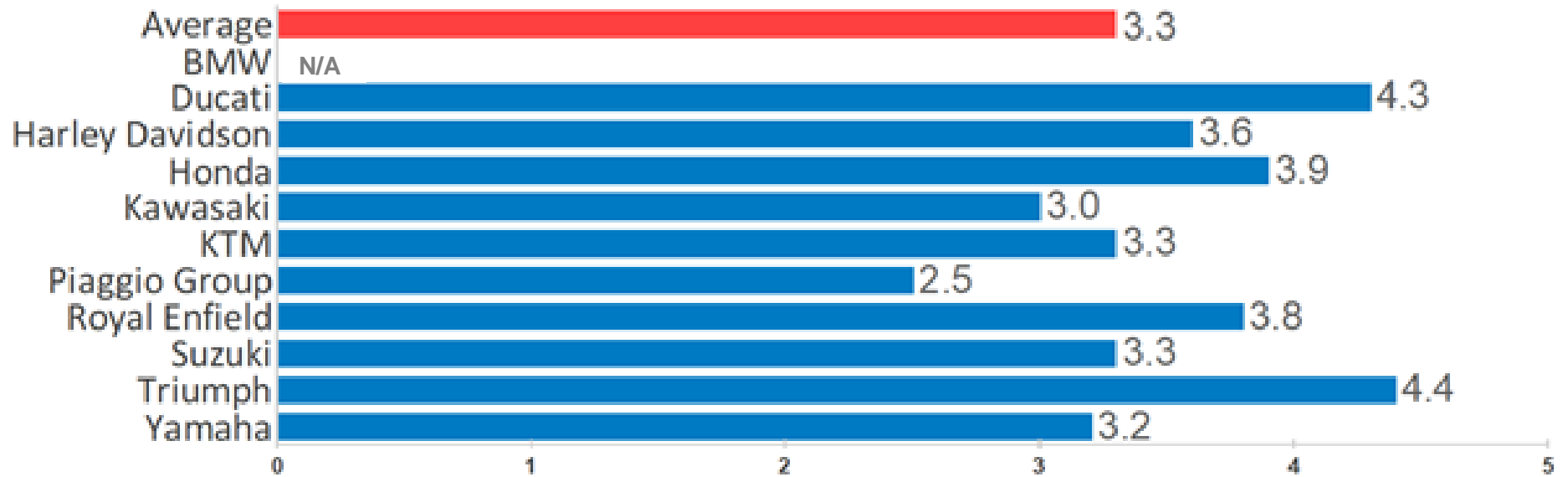
Q5 How many used motorcycles do you sell per annum?



AUTUMN 2019 SURVEY RESULTS			
Less than 100	30%	400 – 599	5%
100 – 199	36%	600 – 799	1%
200 – 299	15%	800 – 999	1%
300 – 399	12%	1000 – 1499	1%
1500 or more	0%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

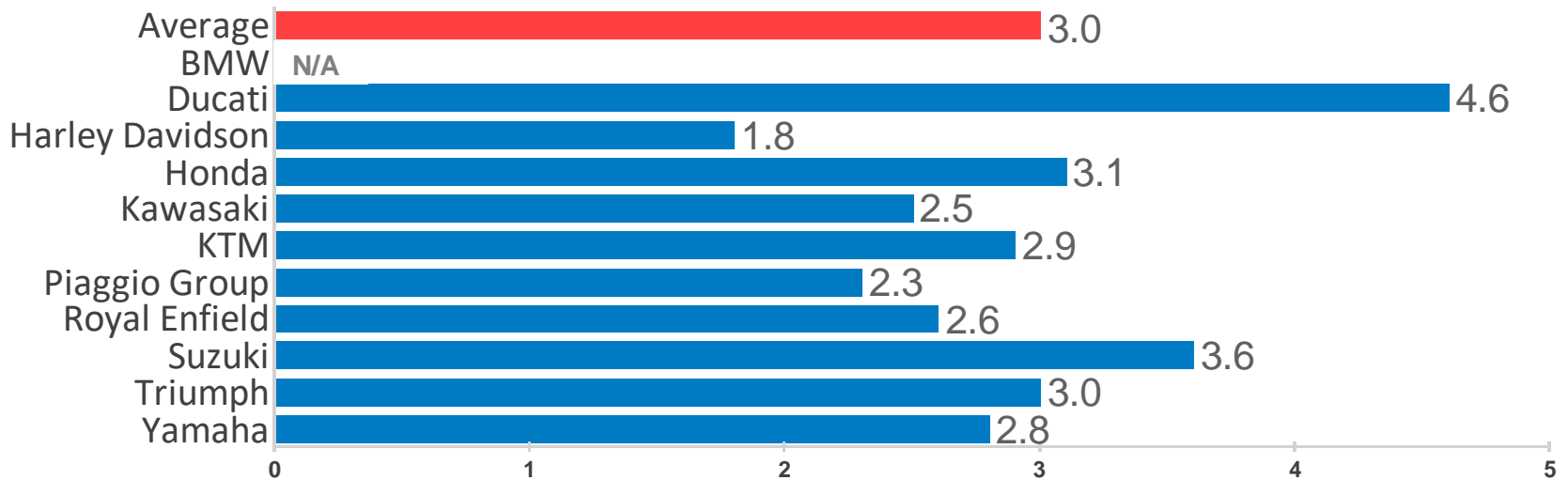


PREVIOUS SURVEY RESULTS – AUTUMN 2019

6a: The product's price and value against other brands			
Ducati	3.7	Triumph	3.8
Harley Davidson	3.4	Yamaha	3.2
Honda	3.7		
Kawasaki	3.8		
KTM	3.0		
Piaggio Group	2.8		
Suzuki	2.9	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

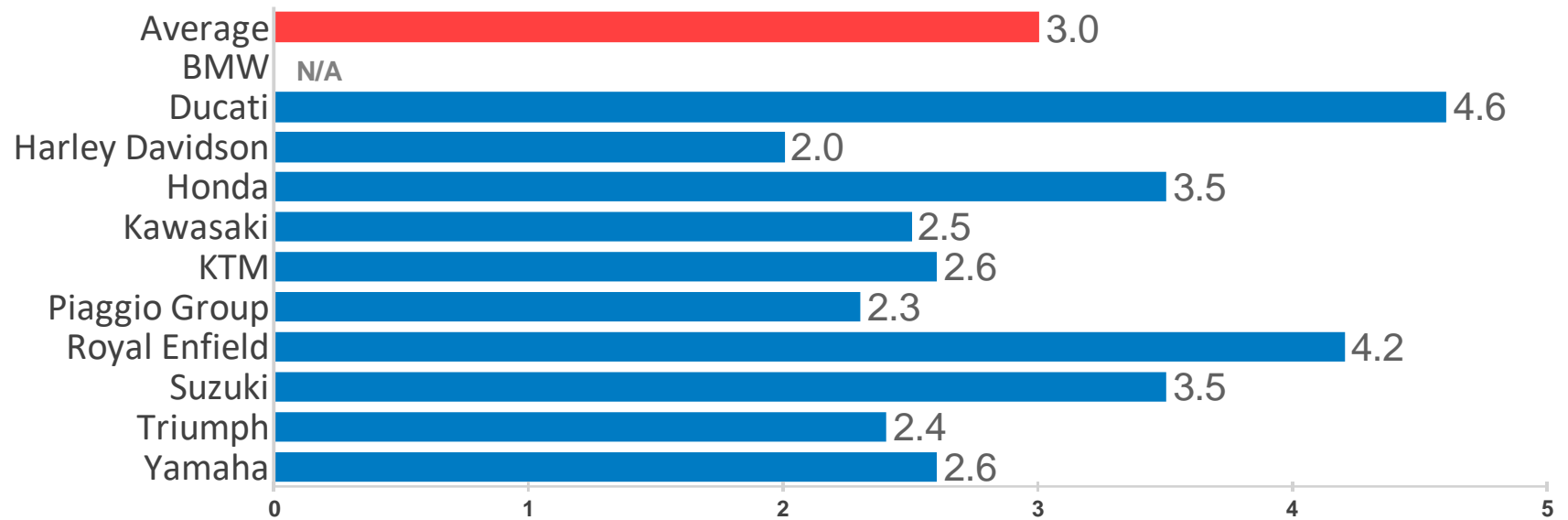


PREVIOUS SURVEY RESULTS – AUTUMN 2019

6b: How realistic is your target and performance related bonus in terms of achievement			
Ducati	3.3	Triumph	2.7
Harley Davidson	2.4	Yamaha	2.2
Honda	2.8		
Kawasaki	2.8		
KTM	2.5		
Piaggio Group	2.5		
Suzuki	2.8	AVERAGE	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

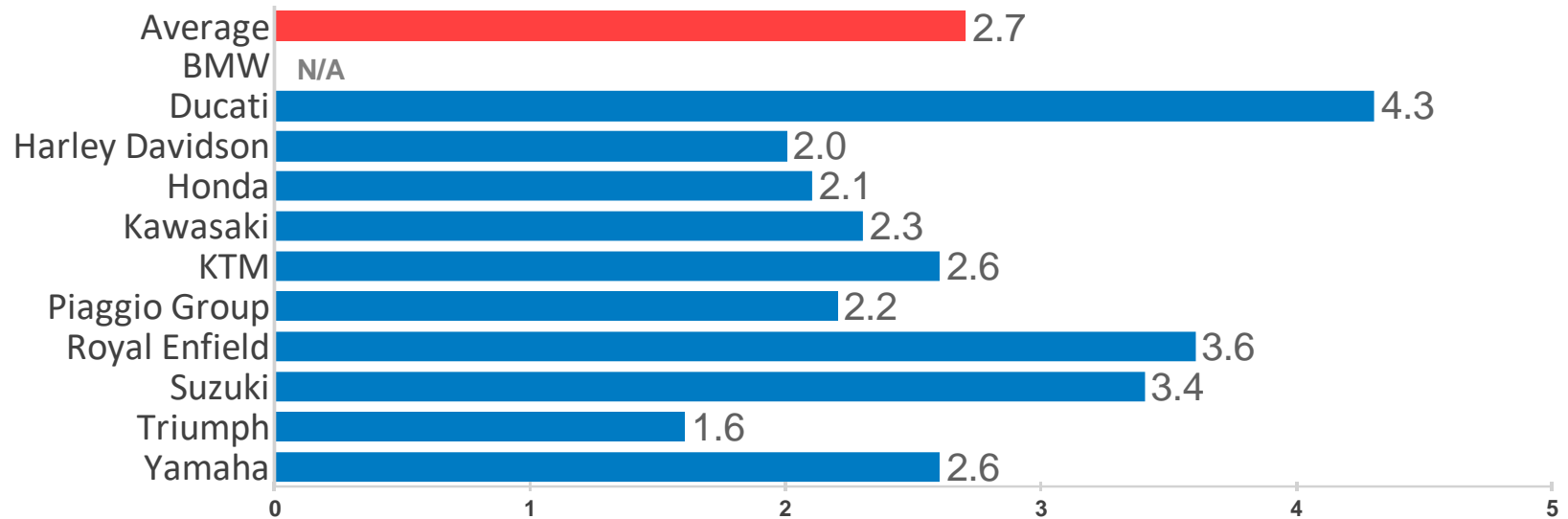


PREVIOUS SURVEY RESULTS – AUTUMN 2019

7a: The fairness of your manufacturer's policy for the supply and stocking of motorcycles			
Ducati	3.7	Triumph	2.5
Harley Davidson	3.4	Yamaha	2.8
Honda	3.0		
Kawasaki	3.8		
KTM	3.0		
Piaggio	2.4		
Suzuki	3.3	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q7 b) The new motorcycle target negotiating process

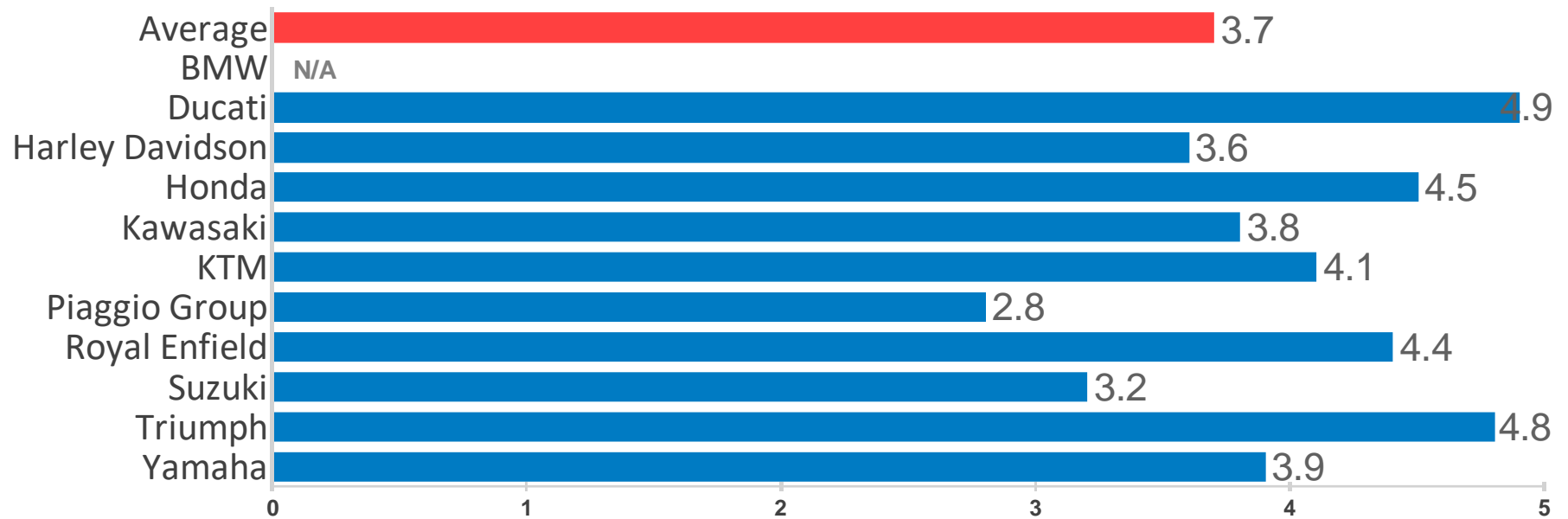


PREVIOUS SURVEY RESULTS – AUTUMN 2019

7b: Your new motorcycle target negotiating process			
Ducati	3.0	Triumph	1.8
Harley Davidson	2.1	Yamaha	2.3
Honda	2.3		
Kawasaki	2.8		
KTM	1.8		
Piaggio Group	2.2		
Suzuki	3.2	AVERAGE	2.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q8 a) The brand image

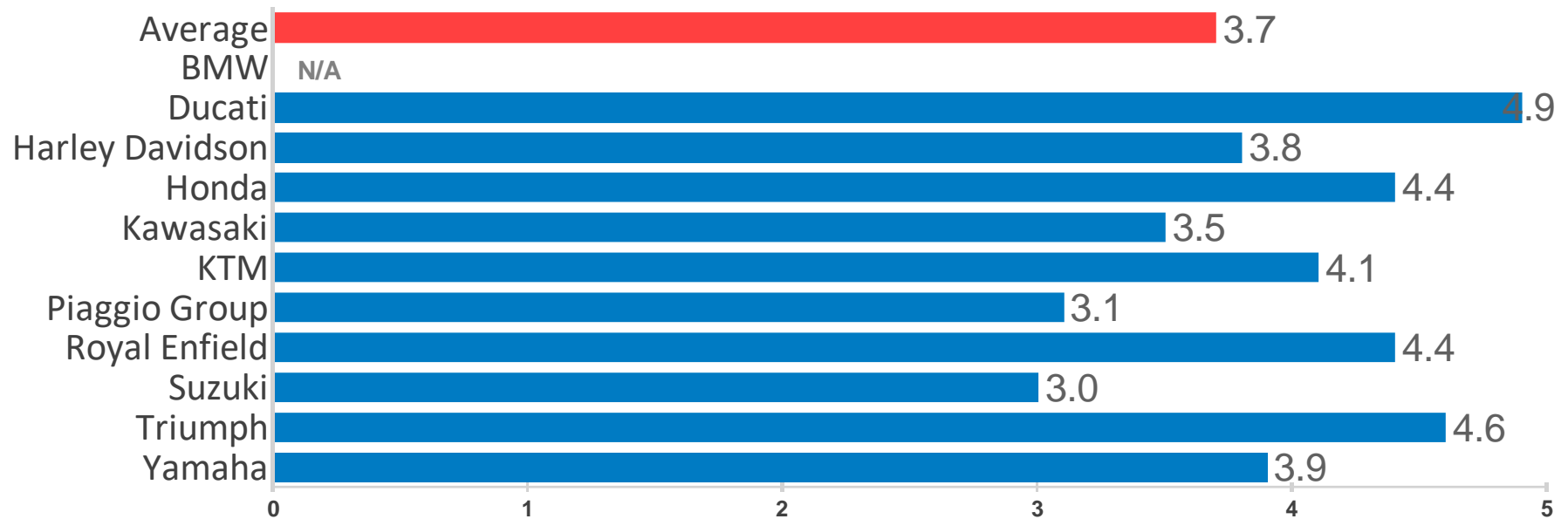


PREVIOUS SURVEY RESULTS – AUTUMN 2019

8a: The brand image			
Ducati	4.8	Triumph	4.5
Harley Davidson	4.6	Yamaha	3.7
Honda	3.9		
Kawasaki	4.4		
KTM	4.0		
Piaggio Group	3.1		
Suzuki	3.2	AVERAGE	3.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q8 b) The product image

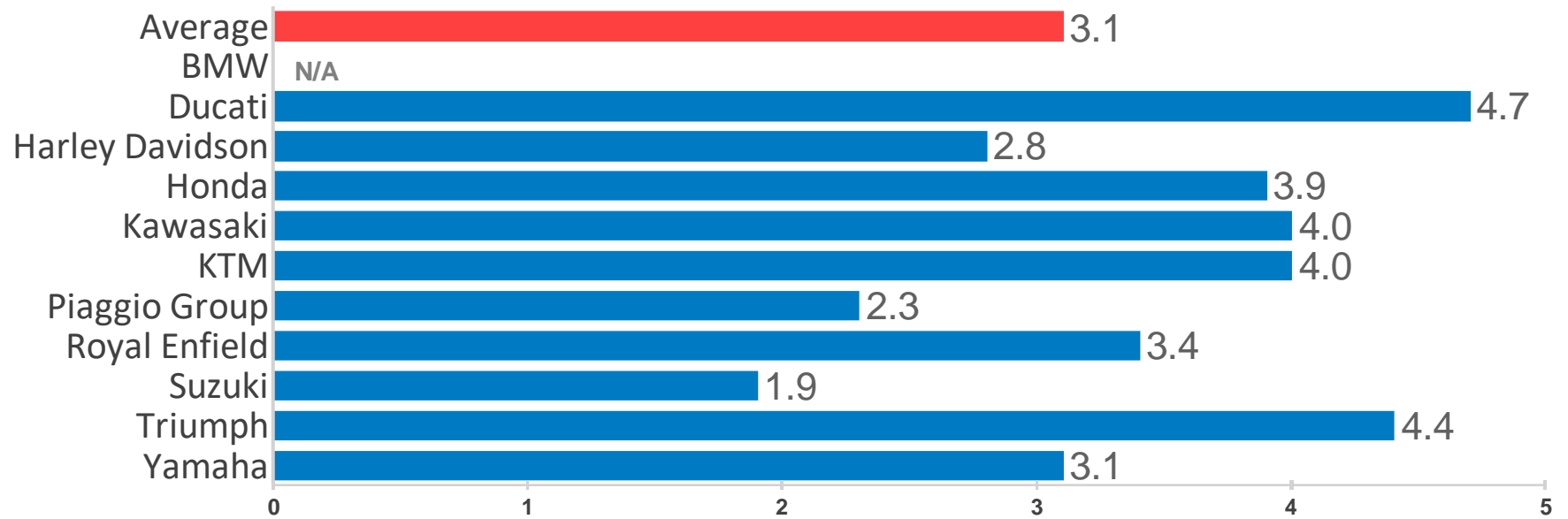


PREVIOUS SURVEY RESULTS – AUTUMN 2019

8b: The product image			
Ducati	4.7	Triumph	4.5
Harley Davidson	4.3	Yamaha	3.8
Honda	3.9		
Kawasaki	4.5		
KTM	4.0		
Piaggio Group	3.3		
Suzuki	2.7	AVERAGE	3.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q8 c) Frequency of introduction of new models

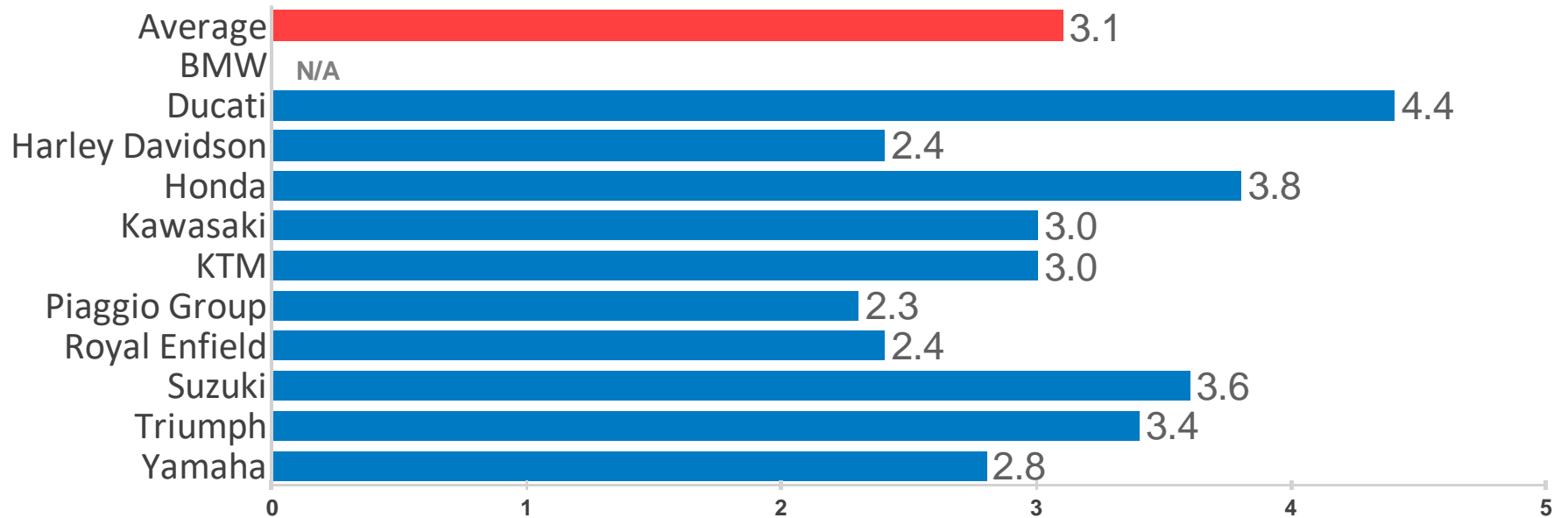


PREVIOUS SURVEY RESULTS – AUTUMN 2019

8c: Frequency of introduction of new models			
Ducati	4.3	Triumph	4.3
Harley Davidson	3.7	Yamaha	3.1
Honda	3.5		
Kawasaki	4.2		
KTM	3.8		
Piaggio Group	2.5		
Suzuki	1.9	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q8 d) Retail sales incentives and promotions

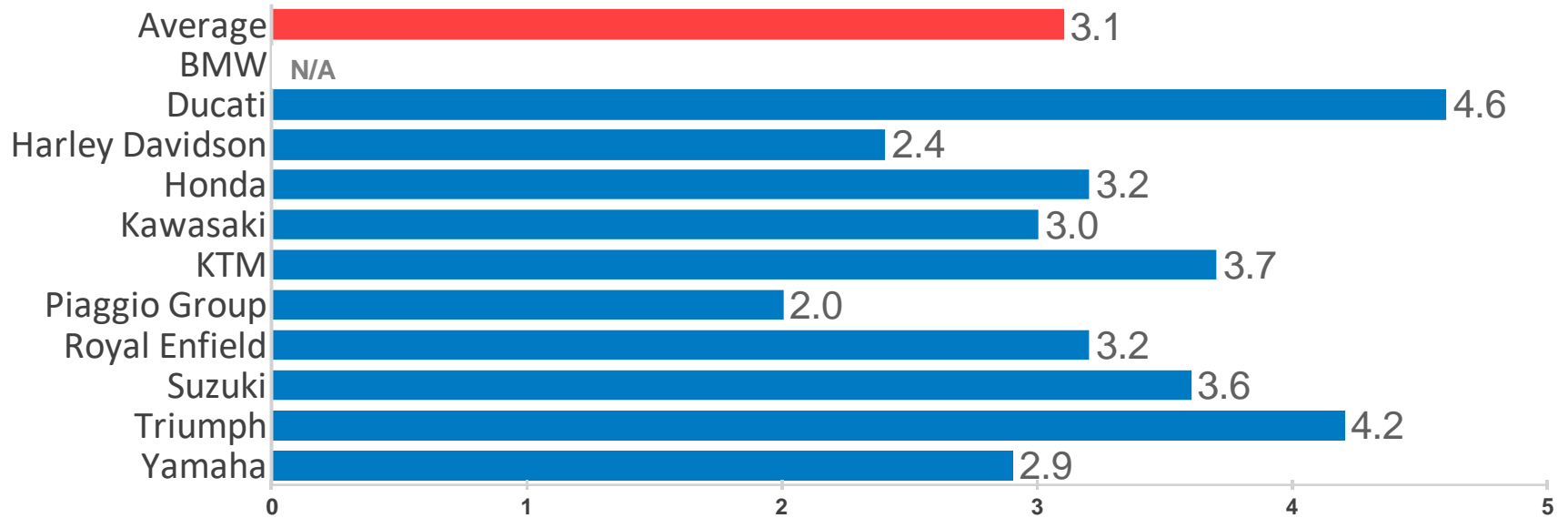


PREVIOUS SURVEY RESULTS – AUTUMN 2019

8d: Retail sales incentives and promotions			
Ducati	3.3	Triumph	3.8
Harley Davidson	3.0	Yamaha	2.9
Honda	3.3		
Kawasaki	4.2		
KTM	4.0		
Piaggio Group	2.5		
Suzuki	3.7	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q8 e) Product advertising

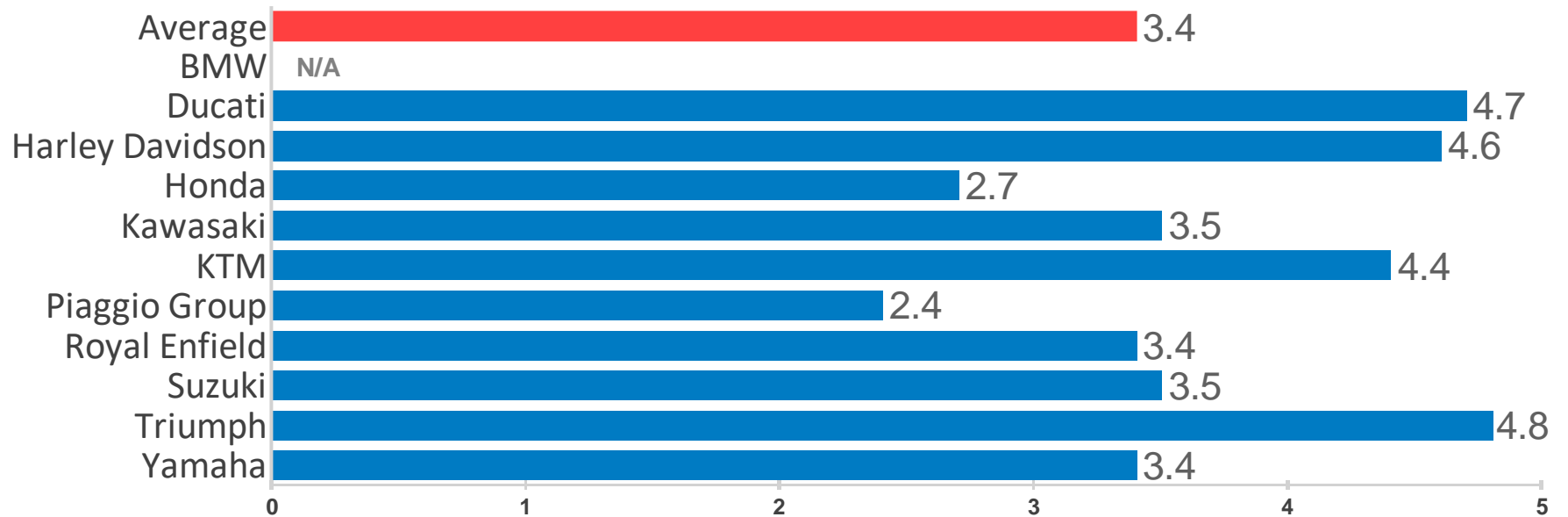


PREVIOUS SURVEY RESULTS – AUTUMN 2019

8e: Product advertising			
Ducati	3.5	Triumph	3.8
Harley Davidson	3.1	Yamaha	3.1
Honda	3.0		
Kawasaki	3.8		
KTM	3.5		
Piaggio Group	2.4		
Suzuki	3.3	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

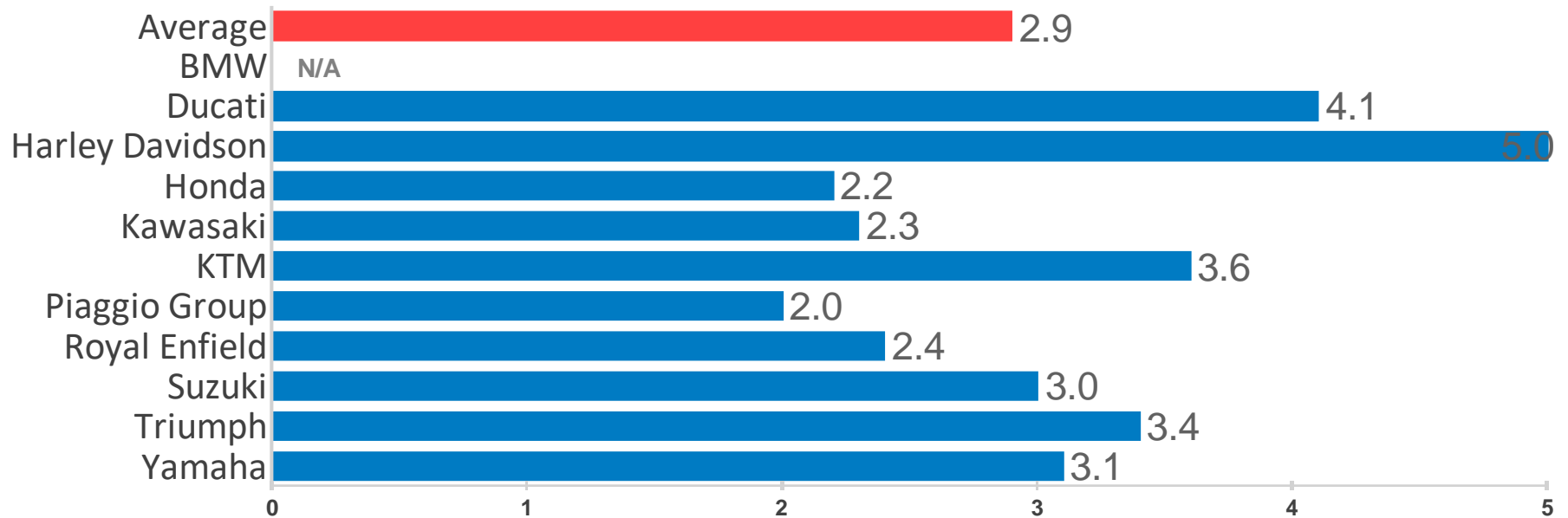


PREVIOUS SURVEY RESULTS – AUTUMN 2019

8f: Have a comprehensive accessory offering that appeals to customers			
Ducati	4.0	Triumph	4.3
Harley Davidson	4.6	Yamaha	3.7
Honda	2.5		
Kawasaki	3.4		
KTM	4.0		
Piaggio Group	2.8		
Suzuki	3.3	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

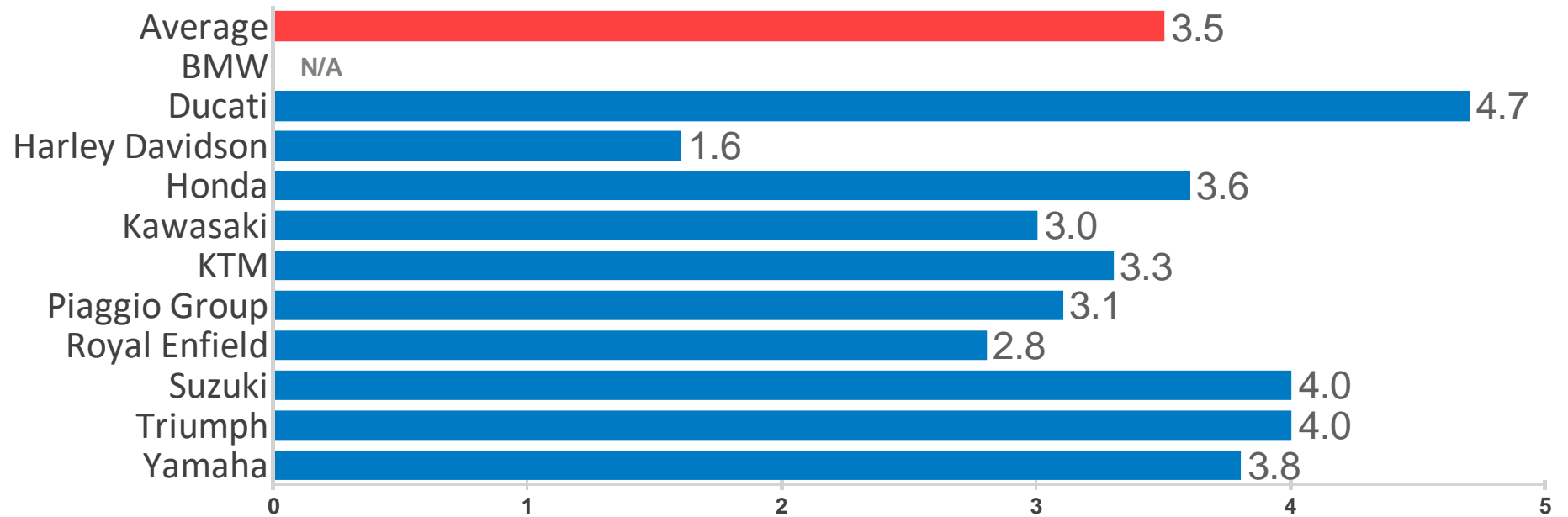


PREVIOUS SURVEY RESULTS – AUTUMN 2019

8g: Have a comprehensive clothing offering that appeals to customers			
Ducati	3.2	Triumph	3.2
Harley Davidson	4.6	Yamaha	3.0
Honda	2.0		
Kawasaki	3.0		
KTM	4.0		
Piaggio Group	2.3		
Suzuki	3.2	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

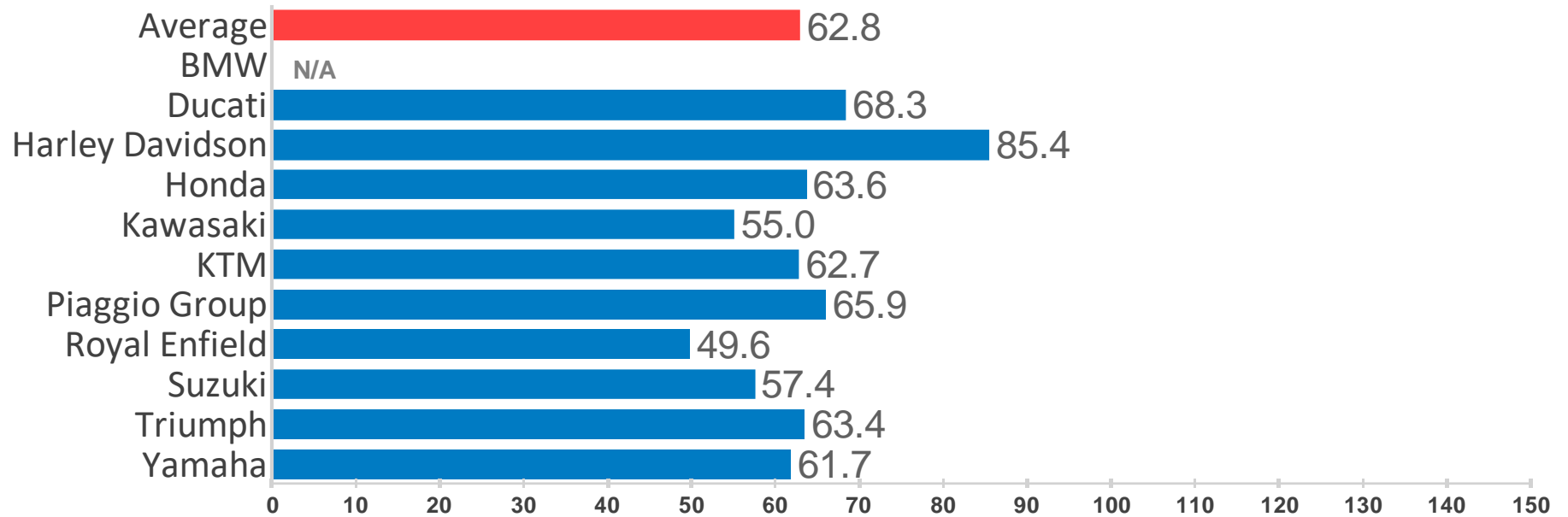


PREVIOUS SURVEY RESULTS – AUTUMN 2019

9: The fairness of your manufacturer's warranty policy			
Ducati	3.8	Triumph	3.8
Harley Davidson	2.4	Yamaha	4.0
Honda	3.5		
Kawasaki	4.0		
KTM	3.5		
Piaggio Group	3.7		
Suzuki	3.7	AVERAGE	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

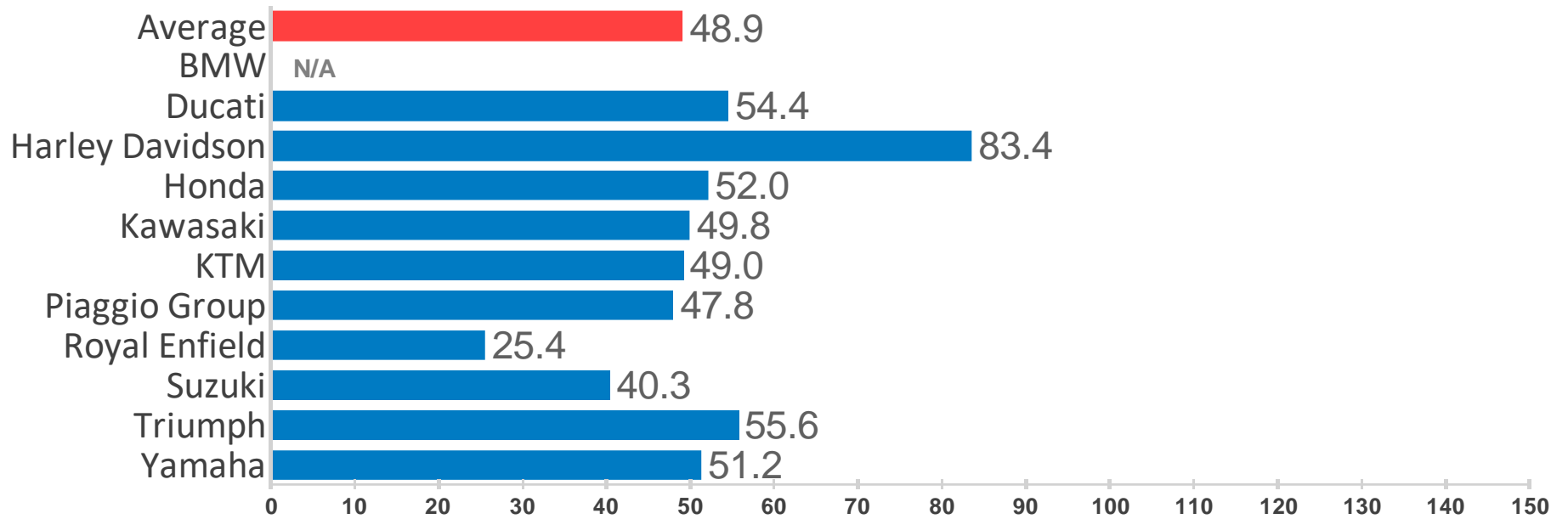


PREVIOUS SURVEY RESULTS – AUTUMN 2019

10: What is your labour rate for retail (£)			
Ducati	71.5	Triumph	64.5
Harley Davidson	85.8	Yamaha	57.4
Honda	59.7		
Kawasaki	60.1		
KTM	62.5		
Piaggio Group	63.9		
Suzuki	54.6	AVERAGE	60.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

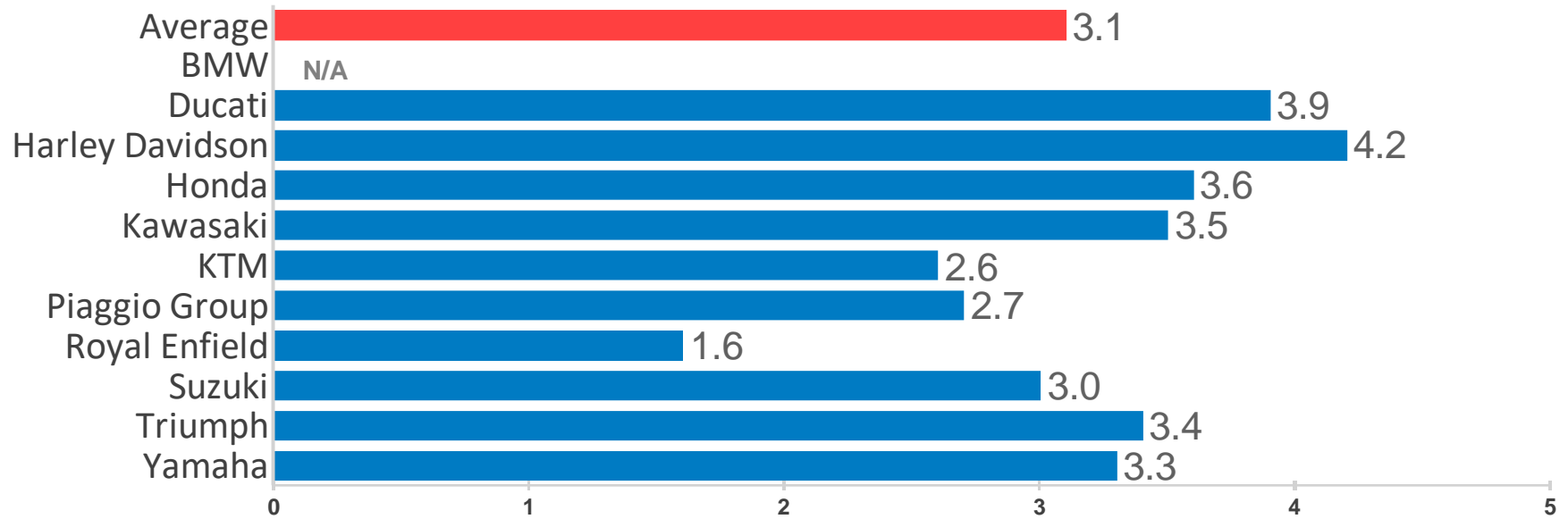


PREVIOUS SURVEY RESULTS – AUTUMN 2019

11. What is your labour rate for warranty (£)			
Ducati	56.3	Triumph	52.3
Harley Davidson	75.2	Yamaha	53.2
Honda	50.1		
Kawasaki	61.3		
KTM	48.5		
Piaggio Group	48.6		
Suzuki	42.5	AVERAGE	52.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q12 a) Warranty labour rate

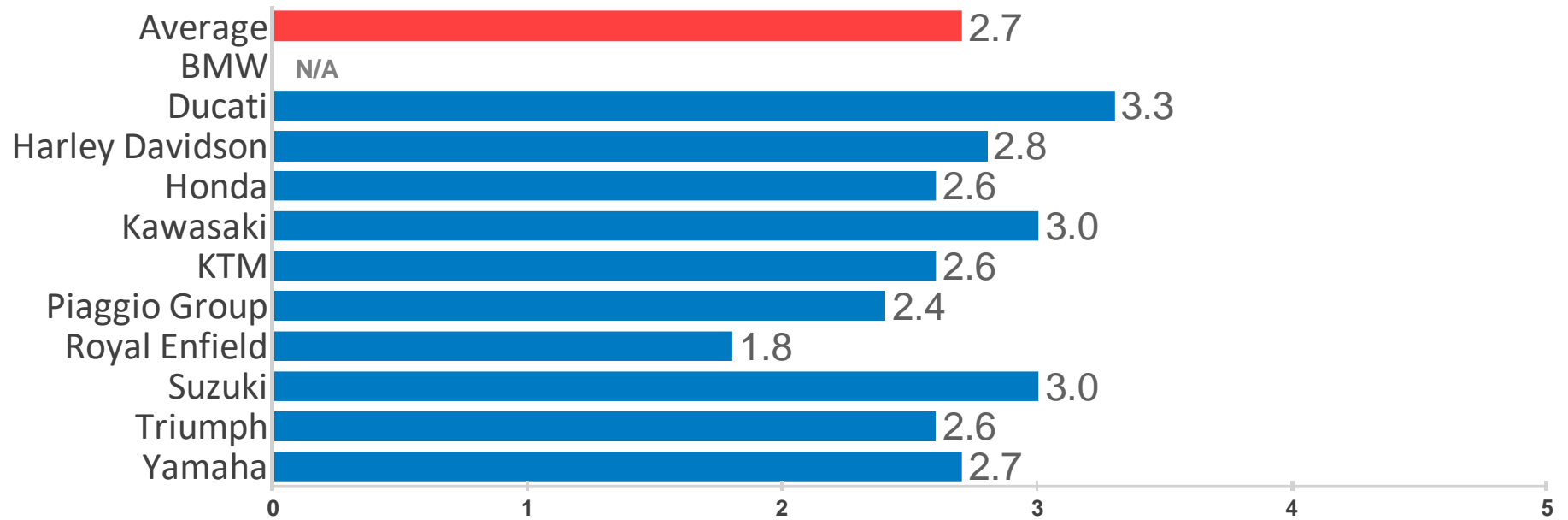


PREVIOUS SURVEY RESULTS – AUTUMN 2019

12a: Warranty labour rate			
Ducati	3.0	Triumph	3.3
Harley Davidson	4.1	Yamaha	3.2
Honda	3.0		
Kawasaki	4.3		
KTM	2.5		
Piaggio Group	3.2		
Suzuki	2.8	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q12 b) Warranty time allowances

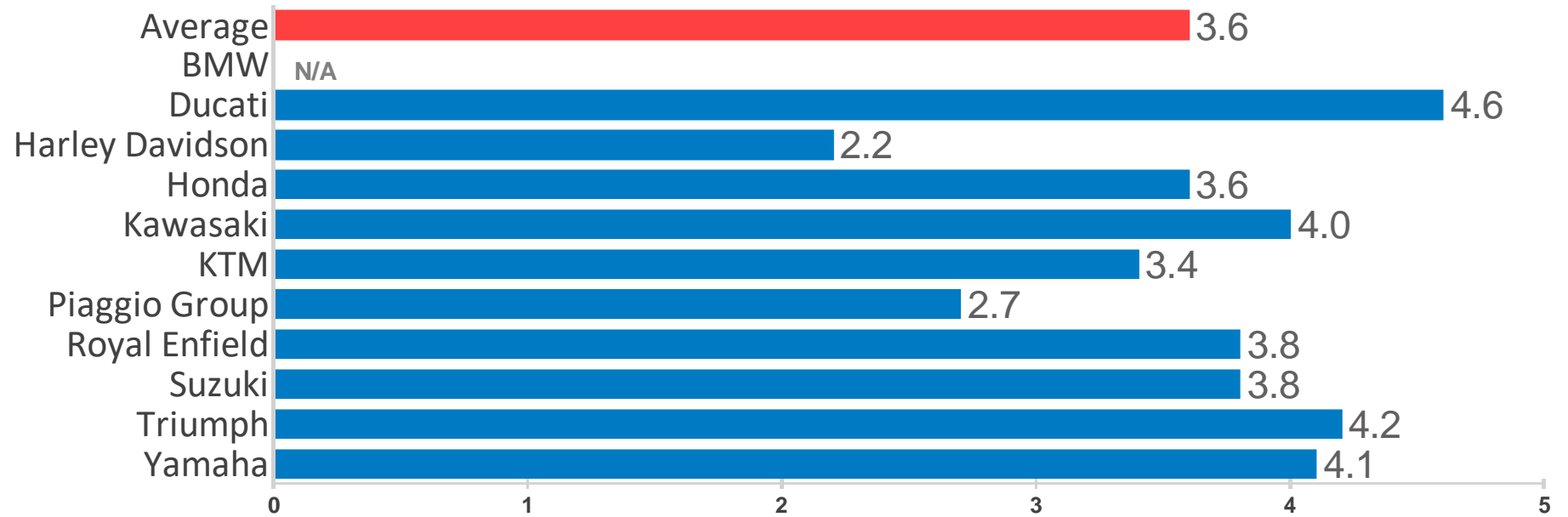


PREVIOUS SURVEY RESULTS – AUTUMN 2019

12b: Warranty time allowances			
Ducati	2.2	Triumph	2.6
Harley Davidson	2.7	Yamaha	2.5
Honda	2.4		
Kawasaki	3.6		
KTM	2.3		
Piaggio Group	2.7		
Suzuki	3.0	AVERAGE	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q12 c) Warranty replacement parts policy

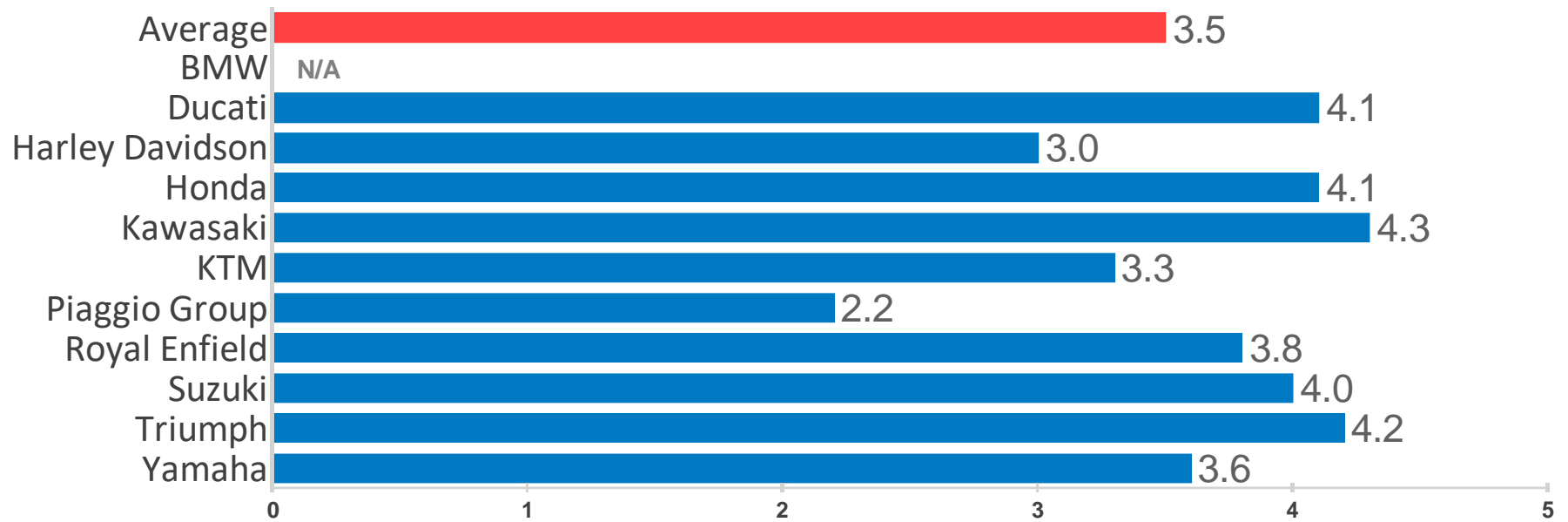


PREVIOUS SURVEY RESULTS – AUTUMN 2019

12c: Warranty replacement parts policy			
Ducati	4.0	Triumph	3.7
Harley Davidson	2.7	Yamaha	4.0
Honda	3.5		
Kawasaki	4.2		
KTM	3.0		
Piaggio Group	3.5		
Suzuki	3.7	AVERAGE	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q12 d) Timely and fair settlement of warranty claims

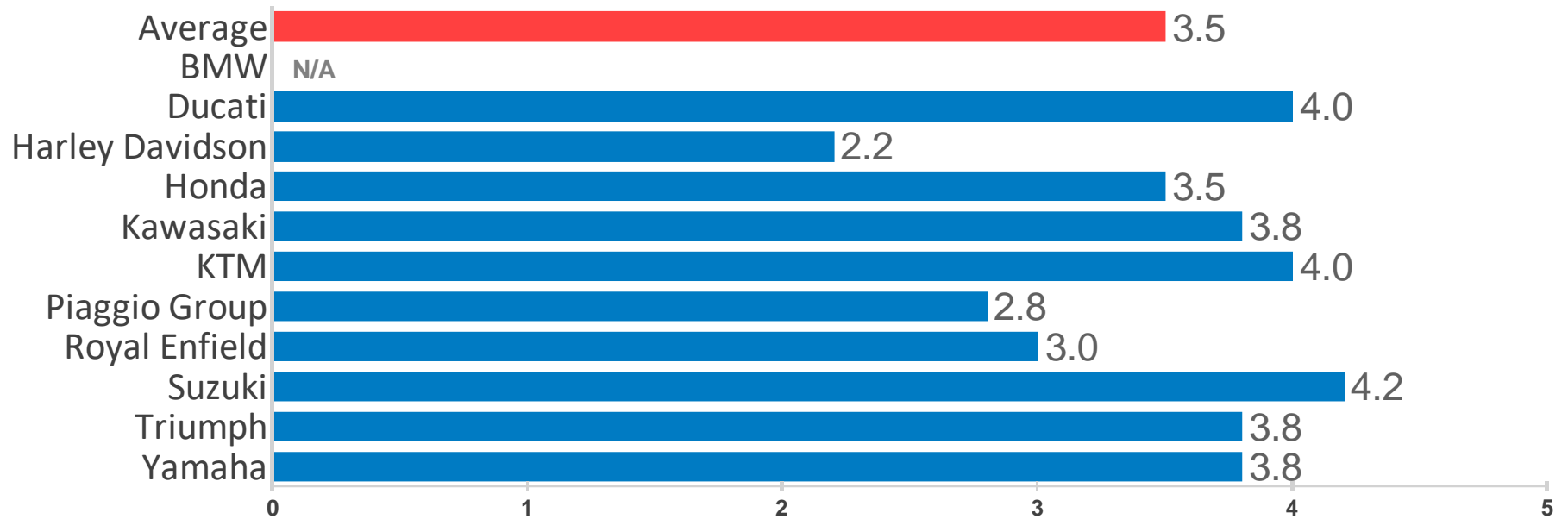


PREVIOUS SURVEY RESULTS – AUTUMN 2019

12d: Timely and fair settlement of warranty claims			
Ducati	4.2	Triumph	3.7
Harley Davidson	3.3	Yamaha	4.2
Honda	3.6		
Kawasaki	4.4		
KTM	3.3		
Piaggio Group	3.4		
Suzuki	3.9	AVERAGE	3.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q12 e) Quality and availability of technical support

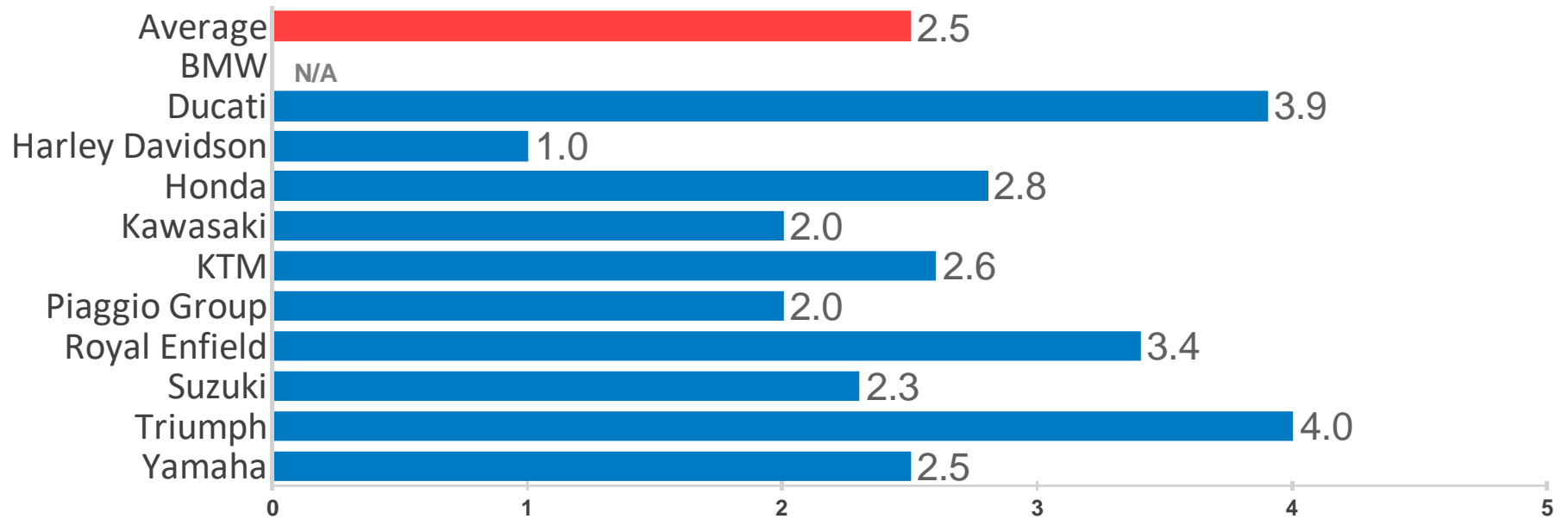


PREVIOUS SURVEY RESULTS – AUTUMN 2019

12e: Quality and availability of technical support			
Ducati	3.0	Triumph	3.8
Harley Davidson	2.4	Yamaha	3.7
Honda	3.3		
Kawasaki	4.4		
KTM	3.5		
Piaggio Group	3.4		
Suzuki	3.7	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

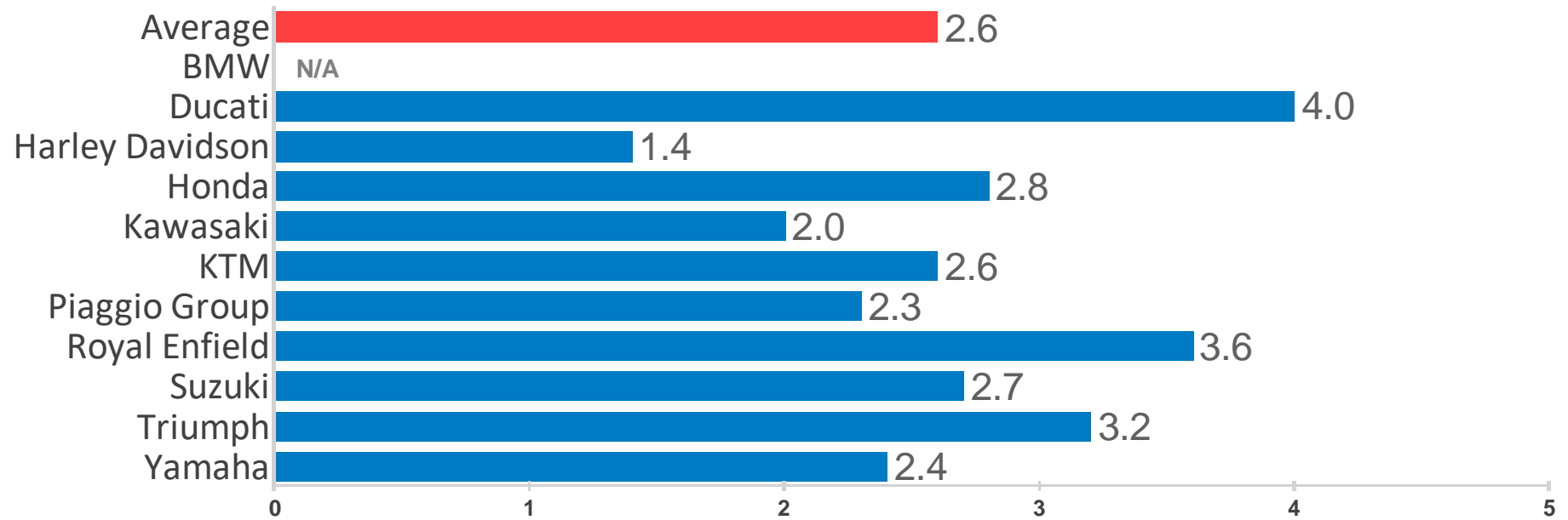


PREVIOUS SURVEY RESULTS – AUTUMN 2019

13: The profit return by representing your franchise			
Ducati	3.5	Triumph	3.5
Harley Davidson	2.3	Yamaha	2.2
Honda	2.5		
Kawasaki	3.4		
KTM	3.0		
Piaggio Group	2.8		
Suzuki	2.6	AVERAGE	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q14 a) The future profitability of your business

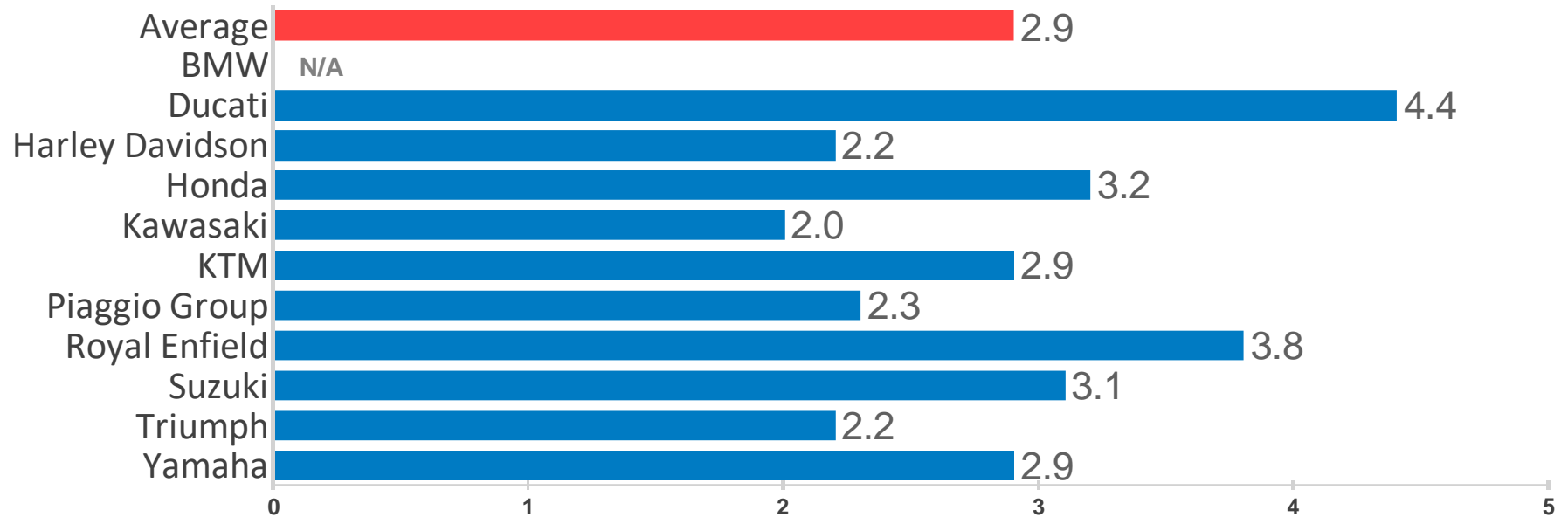


PREVIOUS SURVEY RESULTS – AUTUMN 2019

14a: The future profitability of your business			
Ducati	3.5	Triumph	3.5
Harley Davidson	3.1	Yamaha	2.7
Honda	2.9		
Kawasaki	3.5		
KTM	3.3		
Piaggio Group	2.4		
Suzuki	2.7	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q14 b) Your stocking plan for this franchise

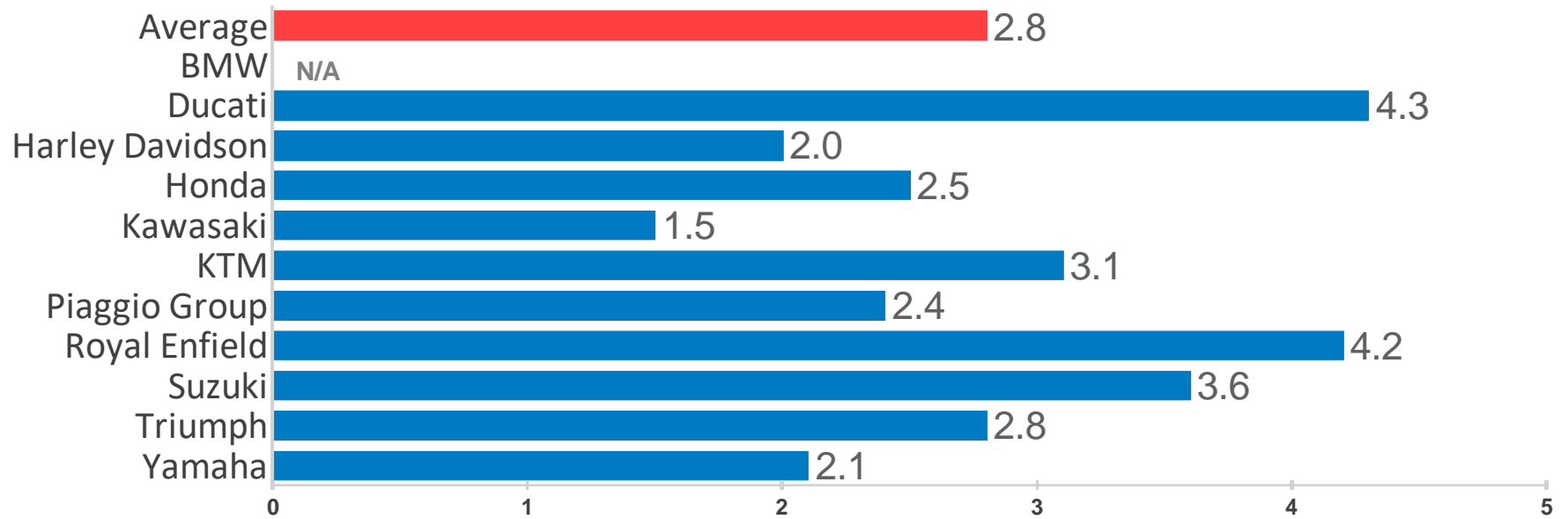


PREVIOUS SURVEY RESULTS – AUTUMN 2019

14b: Your stocking plan for this franchise			
Ducati	3.3	Triumph	2.5
Harley Davidson	3.9	Yamaha	2.7
Honda	3.3		
Kawasaki	3.4		
KTM	2.8		
Piaggio Group	2.5		
Suzuki	3.3	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q15 a) The dealer standards expected by your manufacturer

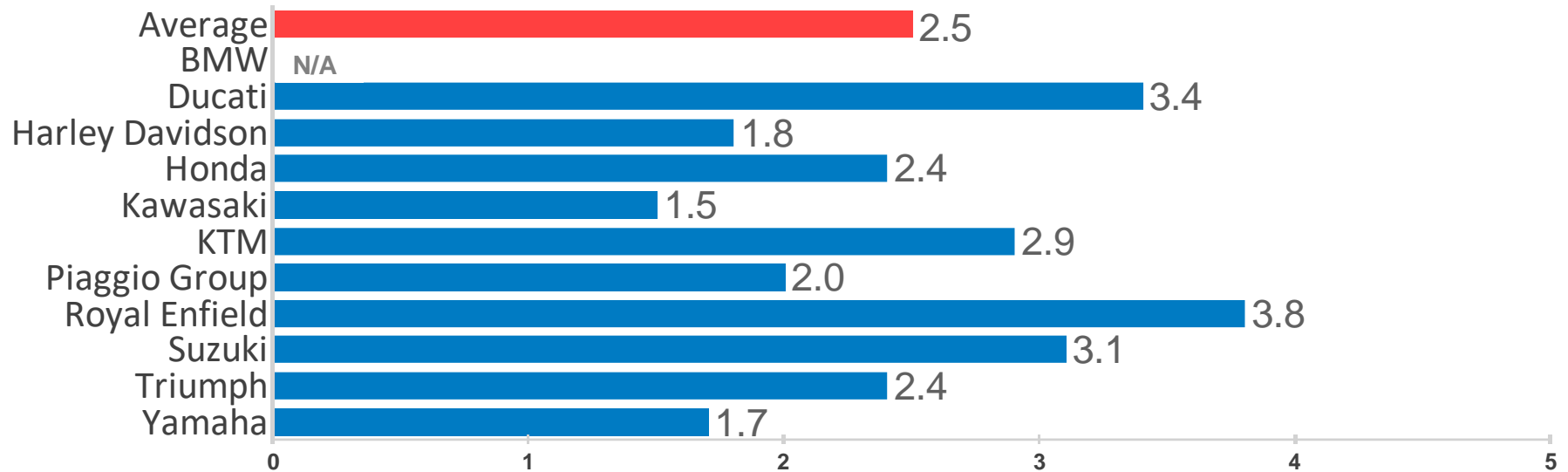


PREVIOUS SURVEY RESULTS – AUTUMN 2019

15a: The dealer standards expected by your manufacturer			
Ducati	3.3	Triumph	3.1
Harley Davidson	3.6	Yamaha	2.0
Honda	2.3		
Kawasaki	2.9		
KTM	3.0		
Piaggio Group	2.5		
Suzuki	3.7	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

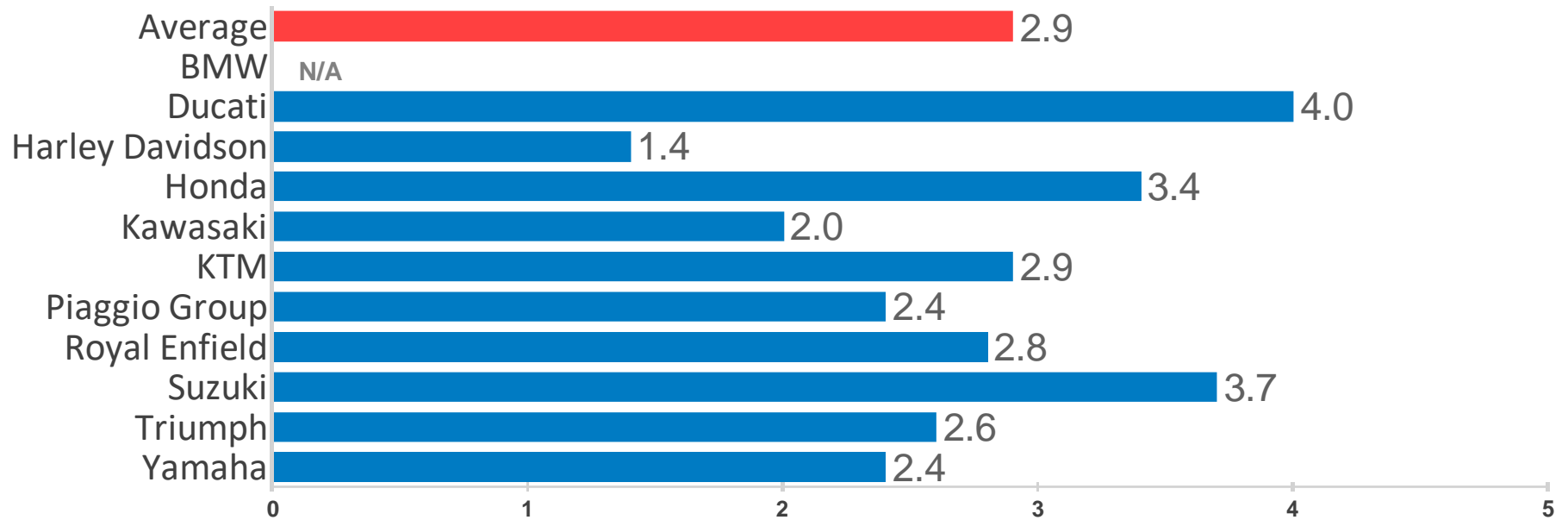


PREVIOUS SURVEY RESULTS – AUTUMN 2019

15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward			
Ducati	3.0	Triumph	2.7
Harley Davidson	3.3	Yamaha	1.8
Honda	2.3		
Kawasaki	2.8		
KTM	3.0		
Piaggio Group	2.2		
Suzuki	3.1	AVERAGE	2.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

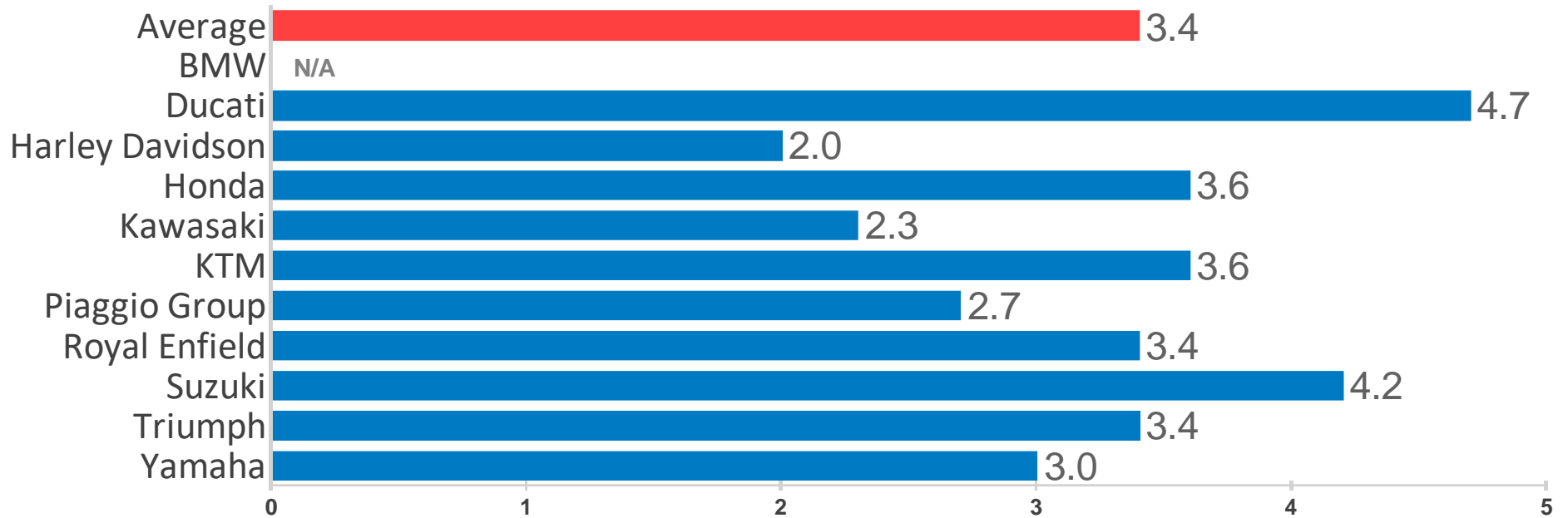


PREVIOUS SURVEY RESULTS – AUTUMN 2019

16a: That the management of your manufacturer takes dealers' views and opinions into account			
Ducati	3.5	Triumph	2.8
Harley Davidson	3.3	Yamaha	2.4
Honda	2.8		
Kawasaki	3.5		
KTM	3.3		
Piaggio Group	2.2		
Suzuki	3.3	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q16 b) The effectiveness of the field sales team

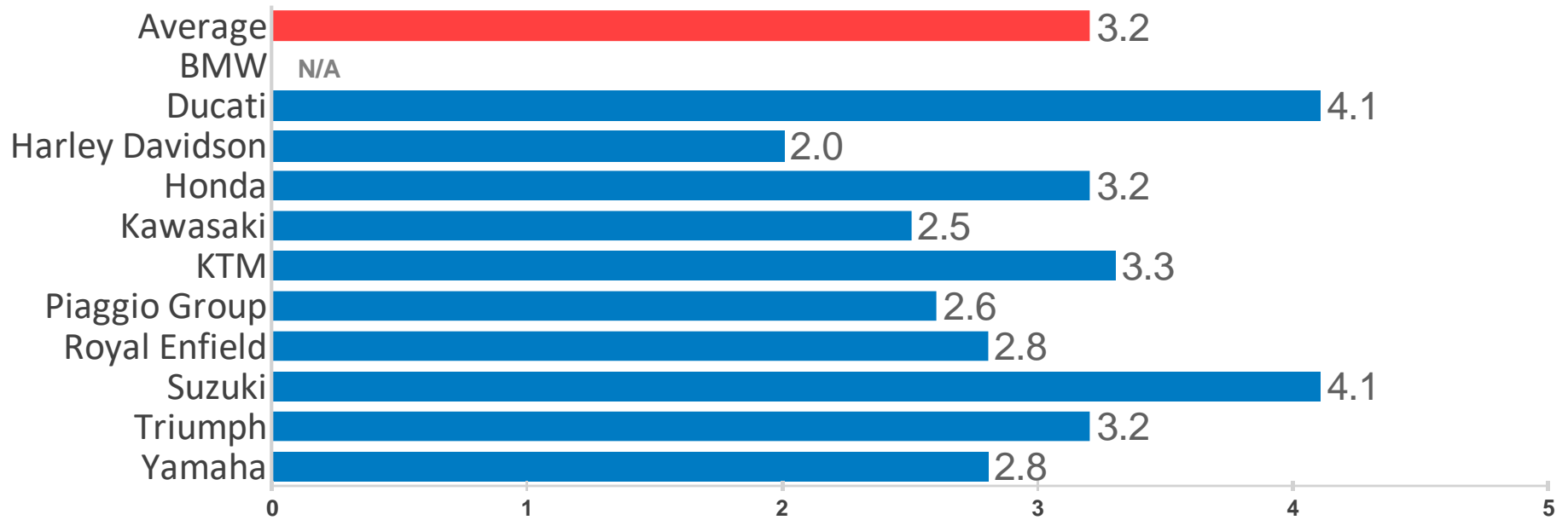


PREVIOUS SURVEY RESULTS – AUTUMN 2019

16b: The effectiveness of your field sales team			
Ducati	4.0	Triumph	3.9
Harley Davidson	3.4	Yamaha	3.7
Honda	3.0		
Kawasaki	4.3		
KTM	3.8		
Piaggio Group	2.9		
Suzuki	4.0	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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



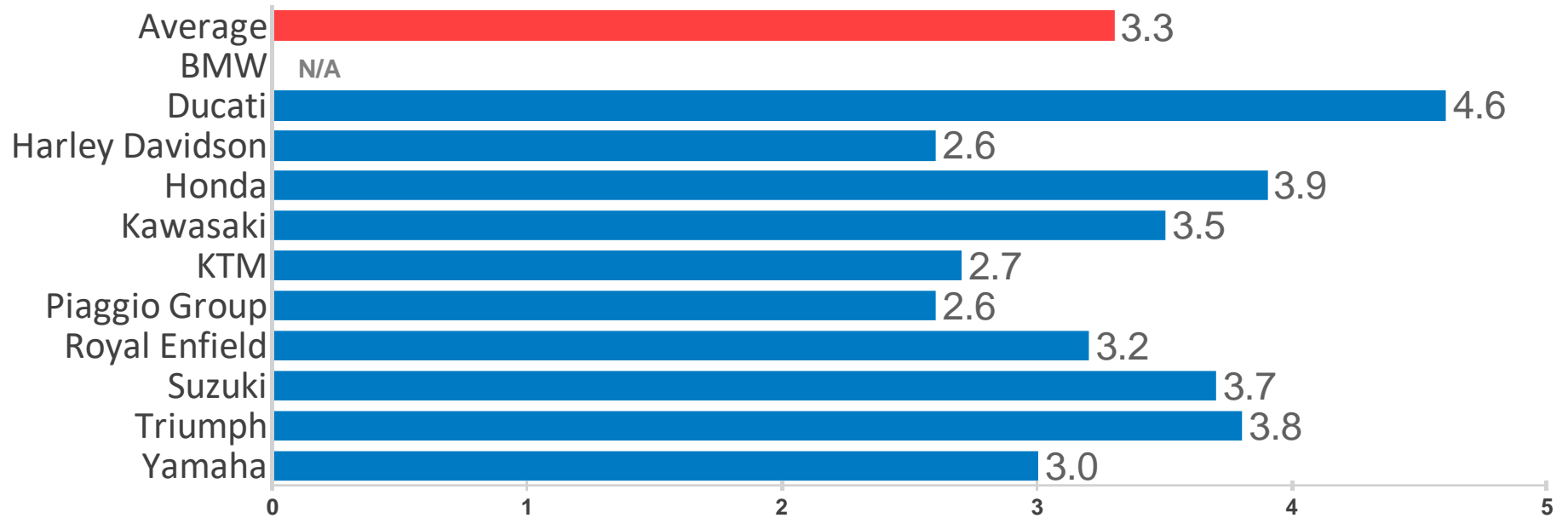
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REVIIOUS SURVEY RESULTS – AUTUMN 2019

16c: The effectiveness of the field service and parts staff			
Ducati	3.3	Triumph	3.2
Harley Davidson	3.3	Yamaha	3.2
Honda	3.0		
Kawasaki	4.0		
KTM	3.5		
Piaggio Group	3.0		
Suzuki	3.8	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

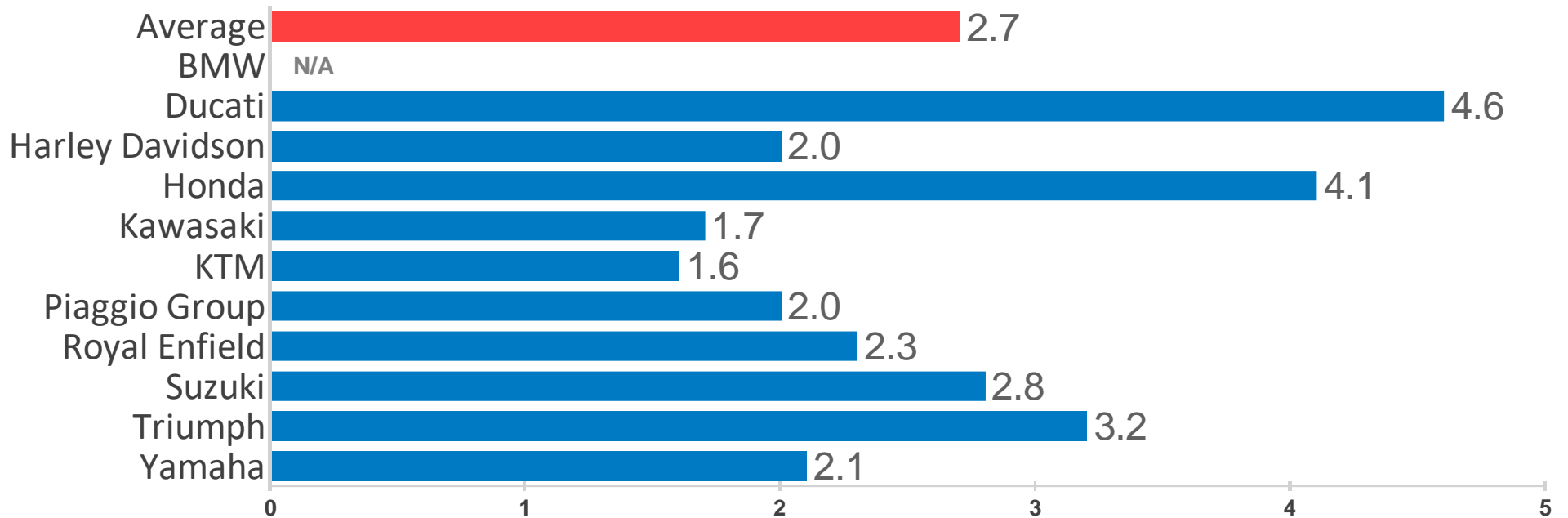


PREVIOUS SURVEY RESULTS – AUTUMN 2019

16d: The effectiveness of your manufacturer's retail finance programme			
Ducati	3.3	Triumph	3.5
Harley Davidson	3.6	Yamaha	3.3
Honda	3.5		
Kawasaki	4.2		
KTM	3.0		
Piaggio Group	2.8		
Suzuki	3.7	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

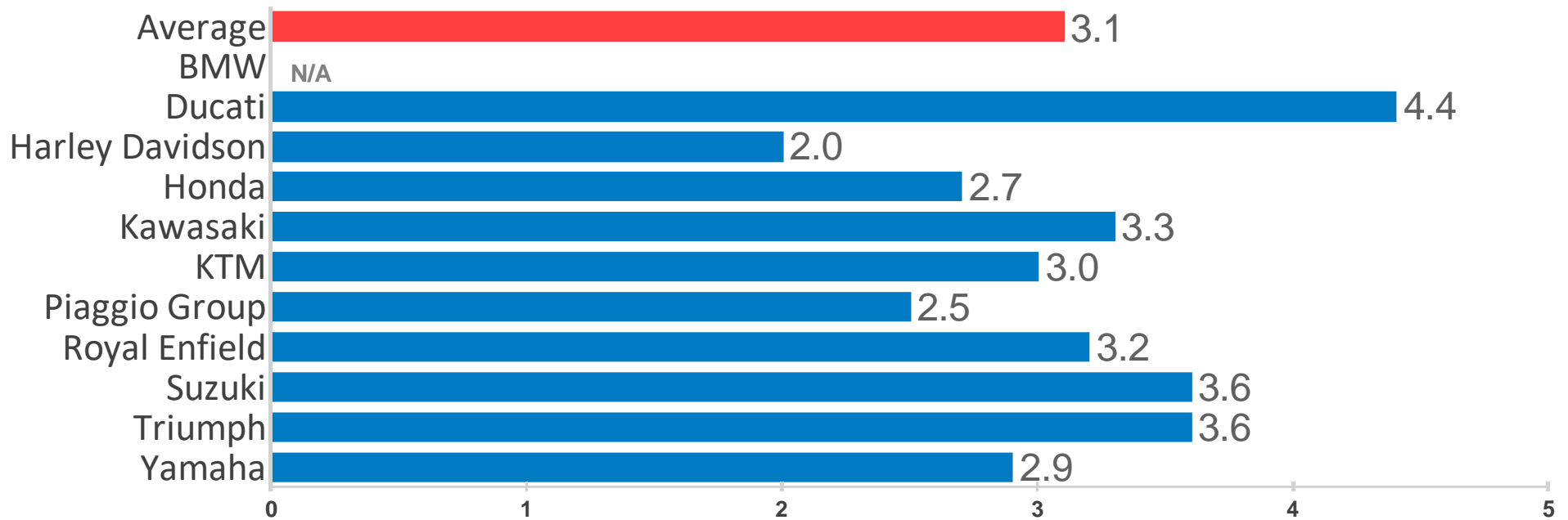


PREVIOUS SURVEY RESULTS – AUTUMN 2019

16e: The effectiveness of your dealer council and dealer forums			
Ducati	3.7	Triumph	2.2
Harley Davidson	3.6	Yamaha	2.0
Honda	3.1		
Kawasaki	2.7		
KTM	2.7		
Piaggio Group	2.5		
Suzuki	2.6	AVERAGE	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q17 a) The routine procedures and controls expected

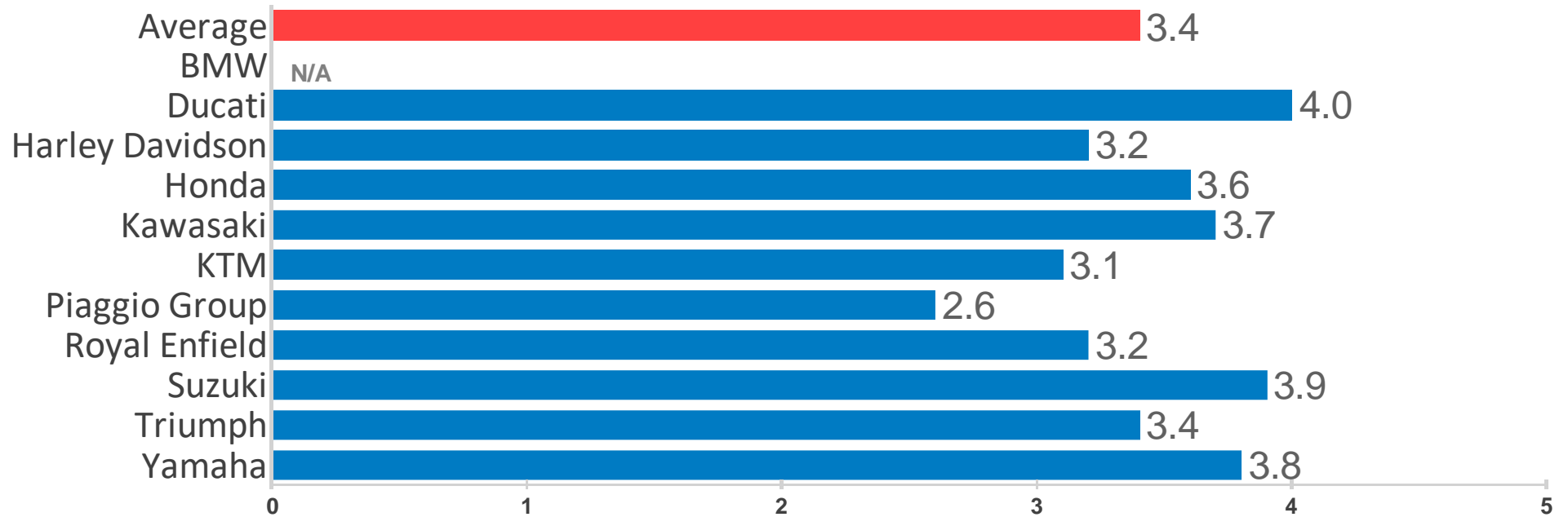


PREVIOUS SURVEY RESULTS – AUTUMN 2019

17a: The routine procedures and controls expected			
Ducati	3.3	Triumph	2.8
Harley Davidson	3.4	Yamaha	2.9
Honda	2.8		
Kawasaki	3.7		
KTM	3.0		
Piaggio Group	2.5		
Suzuki	3.5	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q17 b) The quality of your manufacturer's training

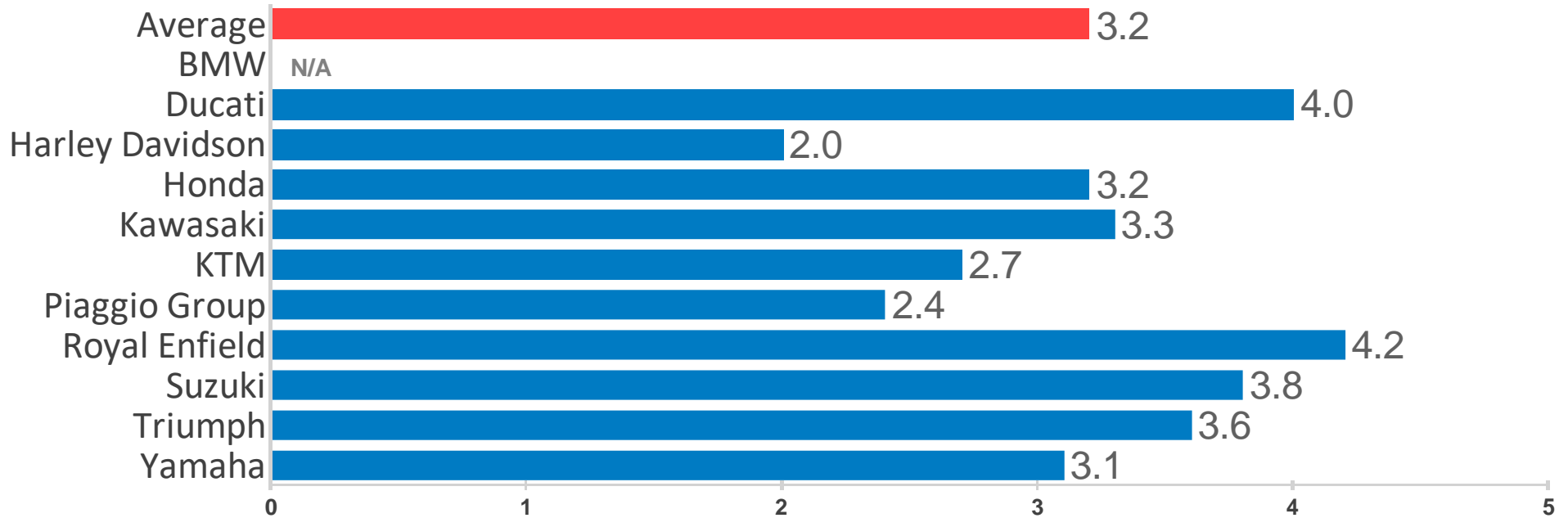


PREVIOUS SURVEY RESULTS – AUTUMN 2019

17b: The quality of your manufacturer's training			
Ducati	3.2	Triumph	3.5
Harley Davidson	3.6	Yamaha	3.5
Honda	3.4		
Kawasaki	4.0		
KTM	4.0		
Piaggio Group	2.6		
Suzuki	3.7	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

Q17 c) The cost of your manufacturer's training

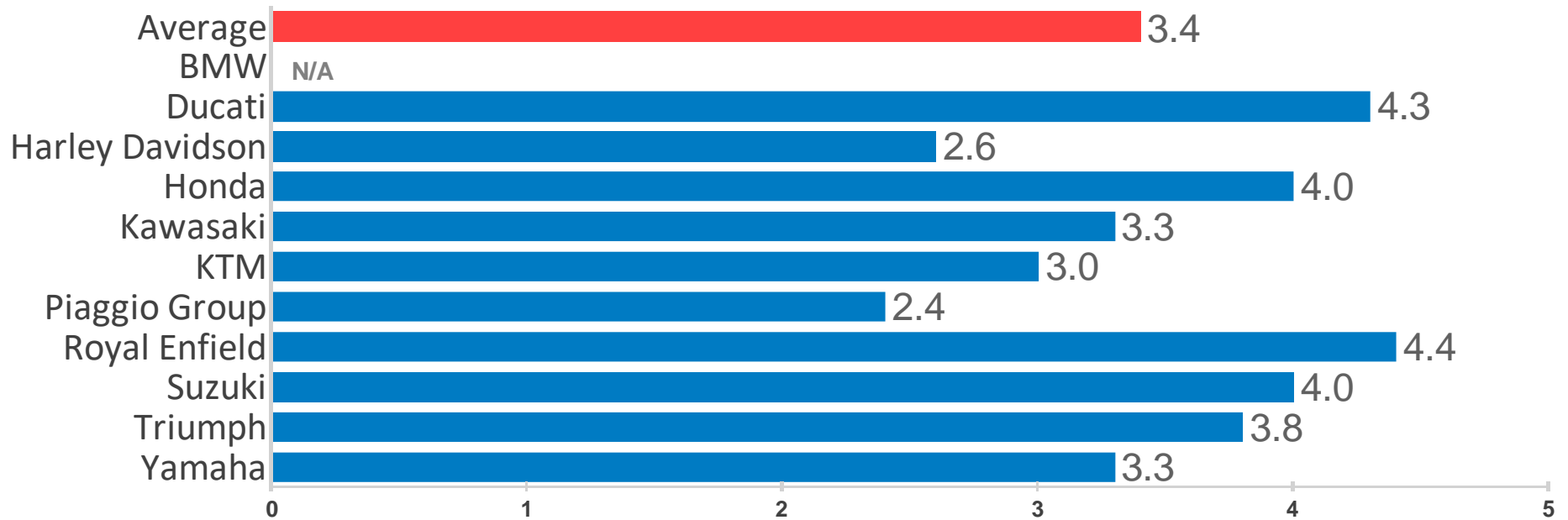


PREVIOUS SURVEY RESULTS – AUTUMN 2019

17c: The cost of your manufacturer's training			
Ducati	2.3	Triumph	3.5
Harley Davidson	2.9	Yamaha	3.2
Honda	3.2		
Kawasaki	3.7		
KTM	3.3		
Piaggio Group	2.4		
Suzuki	3.8	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

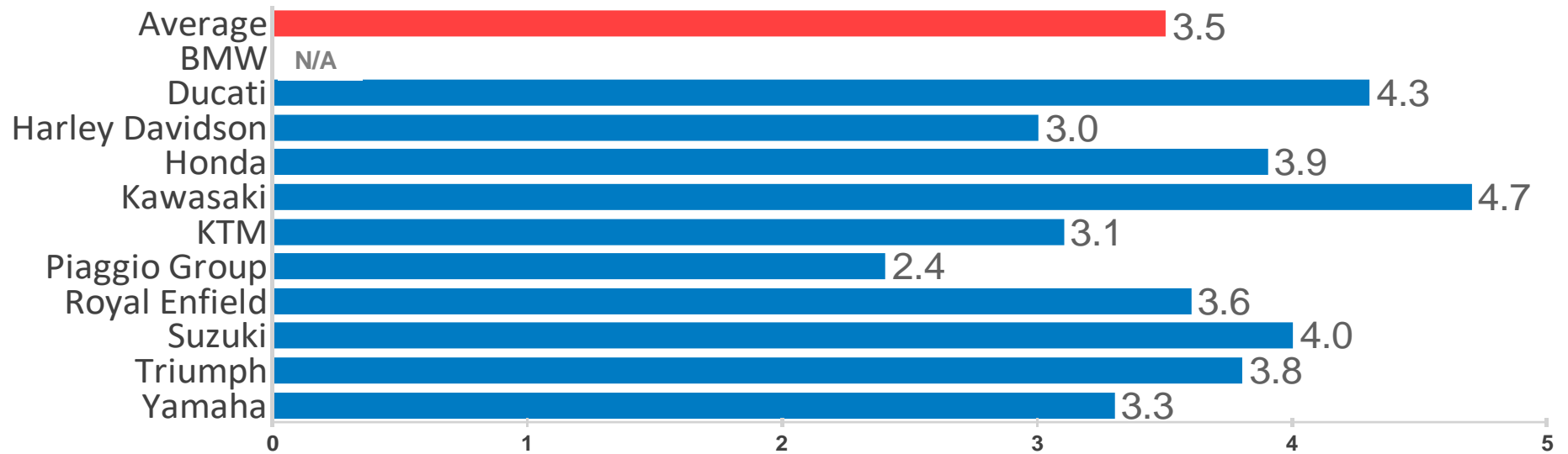


PREVIOUS SURVEY RESULTS – AUTUMN 2019

17d: Your ability to do business with your manufacturer on a day-to-day basis			
Ducati	3.8	Triumph	3.3
Harley Davidson	3.3	Yamaha	3.2
Honda	3.1		
Kawasaki	4.3		
KTM	3.8		
Piaggio Group	2.4		
Suzuki	3.9	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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

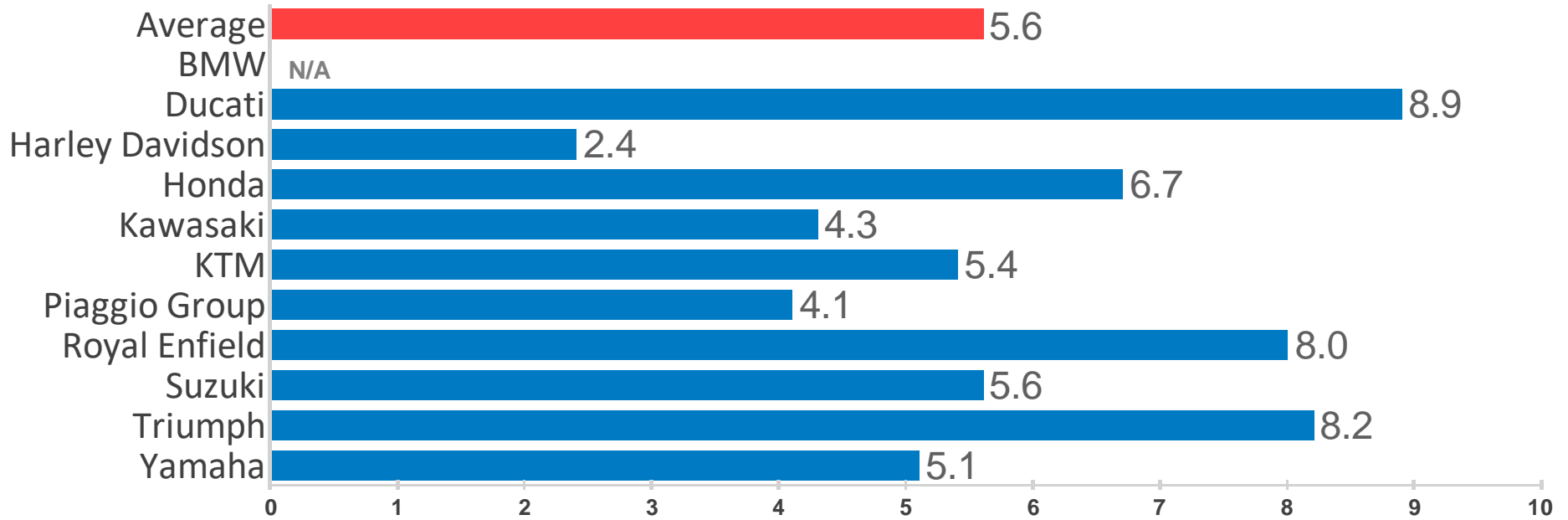


PREVIOUS SURVEY RESULTS – AUTUMN 2019

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process			
Ducati	3.7	Triumph	3.5
Harley Davidson	3.7	Yamaha	3.1
Honda	3.2		
Kawasaki	4.2		
KTM	3.0		
Piaggio Group	2.2		
Suzuki	3.7	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

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



PREVIOUS SURVEY RESULTS – AUTUMN 2019

18: Overall, how do you rate the value of holding your motorcycle franchise			
Ducati	7.3	Triumph	7.5
Harley Davidson	6.9	Yamaha	5.5
Honda	5.8		
Kawasaki	7.9		
KTM	6.8		
Piaggio Group	4.5		
Suzuki	6.1	AVERAGE	6.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 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			
Triumph	4.4	Yamaha	3.2	Ducati	4.6	Kawasaki	2.5
Ducati	4.3	Kawasaki	3.0	Suzuki	3.6	Piaggio Group	2.2
Honda	3.9	Piaggio	2.5	Honda	3.1	Harley Davidson	1.8
Royal Enfield	3.8			Triumph	3.0		
Harley Davidson	3.6			KTM	2.9		
Suzuki	3.3			Yamaha	2.8		
KTM	3.3	Average	3.3	Royal Enfield	2.6	Average	3.0

7a: Your manufacturer's policy for the supply and stocking of motorcycles				7b: The new motorcycle target negotiating process			
Ducati	4.6	Triumph	2.4	Ducati	4.3	Honda	2.1
Royal Enfield	4.2	Piaggio Group	2.3	Royal Enfield	3.6	Harley Davidson	2.0
Honda	3.5	Harley Davidson	2.0	Suzuki	3.4	Triumph	1.6
Suzuki	3.5			KTM	2.6		
Yamaha	2.6			Yamaha	2.6		
KTM	2.6			Kawasaki	2.3		
Kawasaki	2.5	Average	3.0	Piaggio Group	2.2	Average	2.7

8a: The brand image			
Ducati	4.9	Harley Davidson	3.6
Triumph	4.8	Suzuki	3.2
Honda	4.5	Piaggio Group	2.8
Royal Enfield	4.4		
KTM	4.1		
Yamaha	3.9		
Kawasaki	3.8	Average	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

8b: The product image				8c: Frequency of introduction of new models			
Ducati	4.9	Kawasaki	3.5	Ducati	4.7	Harley Davidson	2.8
Triumph	4.6	Piaggio Group	3.1	Triumph	4.4	Piaggio Group	2.3
Honda	4.4	Suzuki	3.0	Kawasaki	4.0	Suzuki	1.9
Royal Enfield	4.4			KTM	4.0		
KTM	4.1			Honda	3.9		
Yamaha	3.9			Royal Enfield	3.4		
Harley Davidson	3.8	Average	3.7	Yamaha	3.1	Average	3.1

8d: Retail sales incentives and promotions				8e: Product advertising			
Ducati	4.4	Harley Davidson	2.4	Ducati	4.6	Yamaha	2.9
Honda	3.8	Royal Enfield	2.4	Triumph	4.2	Harley Davidson	2.4
Suzuki	3.6	Piaggio Group	2.3	KTM	3.7	Piaggio Group	2.0
Triumph	3.4			Suzuki	3.6		
Kawasaki	3.0			Royal Enfield	3.2		
KTM	3.0			Honda	3.2		
Yamaha	2.8	Average	3.1	Kawasaki	3.0	Average	3.1

8f: Have a comprehensive accessory offering that appeals to customers				8g: Have a comprehensive clothing offering that appeals to customers			
Triumph	4.8	Yamaha	3.4	Harley Davidson	5.0	Kawasaki	2.3
Ducati	4.7	Honda	2.7	Ducati	4.1	Honda	2.2
Harley Davidson	4.6	Piaggio Group	2.4	KTM	3.6	Piaggio Group	2.0
KTM	4.4			Triumph	3.4		
Kawasaki	3.5			Yamaha	3.1		
Suzuki	3.5			Suzuki	3.0		
Royal Enfield	3.4	Average	3.4	Royal Enfield	2.4	Average	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

9: Your manufacturer's warranty policy				10: What is your labour rate for retail before VAT (£)			
Ducati	4.7	Kawasaki	3.0	Harley Davidson	85.4	Suzuki	57.4
Suzuki	4.0	Royal Enfield	2.8	Ducati	68.3	Kawasaki	55.0
Triumph	4.0	Harley Davidson	1.6	Piaggio Group	65.9	Royal Enfield	49.6
Yamaha	3.8			Honda	63.6		
Honda	3.6			Triumph	63.4		
KTM	3.3			KTM	62.7		
Piaggio Group	3.1	Average	3.5	Yamaha	61.7	Average	62.8

11: What is your labour rate for warranty before VAT (£)				12a: Warranty labour rate			
Harley Davidson	83.4	Piaggio Group	47.8	Kawasaki	4.2	Piaggio Group	2.7
Triumph	55.6	Suzuki	40.3	Ducati	3.9	KTM	2.6
Ducati	54.4	Royal Enfield	25.4	Honda	3.6	Royal Enfield	1.6
Honda	52.0			Kawasaki	3.5		
Yamaha	51.2			Triumph	3.4		
Kawasaki	49.8			Yamaha	3.3		
KTM	49.0	Average	48.9	Suzuki	3.0	Average	3.1

12b: Warranty replacement parts policy				12c: Warranty time allowances			
Ducati	3.3	KTM	2.6	Ducati	4.6	KTM	3.4
Kawasaki	3.0	Piaggio Group	2.4	Triumph	4.2	Piaggio Group	2.7
Suzuki	3.0	Royal Enfield	1.8	Yamaha	4.1	Harley Davidson	2.2
Harley Davidson	2.8			Kawasaki	4.0		
Yamaha	2.7			Royal Enfield	3.8		
Honda	2.6			Suzuki	3.8		
Triumph	2.6	Average	2.7	Honda	3.6	Average	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

12d: Timely and fair settlement of warranty claims				12e: Quality and availability of technical support			
Kawasaki	4.3	KTM	3.3	Suzuki	4.2	Royal Enfield	3.0
Triumph	4.2	Harley Davidson	3.0	Ducati	4.0	Piaggio Group	2.8
Honda	4.1	Piaggio Group	2.2	KTM	4.0	Harley Davidson	2.2
Ducati	4.1			Yamaha	3.8		
Suzuki	4.0			Kawasaki	3.8		
Royal Enfield	3.8			Triumph	3.8		
Yamaha	3.6	Average	3.5	Honda	3.5	Average	3.5

13: The profit return by representing your franchise				14a: The future profitability of your business			
Triumph	4.0	Kawasaki	2.0	Ducati	4.0	Piaggio Group	2.3
Ducati	3.9	Piaggio Group	2.0	Royal Enfield	3.6	Kawasaki	2.0
Royal Enfield	3.4	Harley Davidson	1.0	Triumph	3.2	Harley Davidson	1.4
Honda	2.8			Honda	2.8		
KTM	2.6			Suzuki	2.7		
Yamaha	2.5			KTM	2.6		
Suzuki	2.3	Average	2.5	Yamaha	2.4	Average	2.6

14b: Your stocking plan for this franchise				15a: The dealer standards expected by your manufacturer			
Ducati	4.4	Triumph	2.2	Ducati	4.3	Yamaha	2.1
Royal Enfield	3.8	Harley Davidson	2.2	Royal Enfield	4.2	Harley Davidson	2.0
Honda	3.2	Kawasaki	2.0	Suzuki	3.6	Kawasaki	1.5
Suzuki	3.1			KTM	3.1		
KTM	2.9			Triumph	2.8		
Yamaha	2.9			Honda	2.5		
Piaggio Group	2.3	Average	2.9	Piaggio Group	2.4	Average	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 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			
Royal Enfield	3.8	Harley Davidson	1.8	Ducati	4.0	Yamaha	2.4
Ducati	3.4	Yamaha	1.7	Suzuki	3.7	Kawasaki	2.0
Suzuki	3.1	Kawasaki	1.5	Honda	3.4	Harley Davidson	1.4
KTM	2.9			KTM	2.9		
Honda	2.4			Royal Enfield	2.8		
Triumph	2.4			Triumph	2.6		
Piaggio Group	2.0	Average	2.5	Piaggio Group	2.4	Average	2.9

16b: The effectiveness of your field sales team				16c: The effectiveness of the field service and parts staff			
Ducati	4.7	Piaggio Group	2.7	Ducati	4.1	Piaggio Group	2.6
Suzuki	4.2	Kawasaki	2.3	Suzuki	4.1	Kawasaki	2.5
Honda	3.6	Harley Davidson	2.0	KTM	3.3	Harley Davidson	2.0
KTM	3.6			Honda	3.2		
Royal Enfield	3.4			Triumph	3.2		
Triumph	3.4			Royal Enfield	2.8		
Yamaha	3.0	Average	3.4	Yamaha	2.8	Average	3.2

16d: The effectiveness of your manufacturer's retail finance programme				16e: The effectiveness of your dealer council and dealer forums			
Ducati	4.6	KTM	2.7	Ducati	4.6	Harley Davidson	2.0
Honda	3.9	Harley Davidson	2.6	Honda	4.1	Kawasaki	1.7
Triumph	3.8	Piaggio Group	2.6	Triumph	3.2	KTM	1.6
Suzuki	3.7			Suzuki	2.8		
Kawasaki	3.5			Royal Enfield	2.3		
Royal Enfield	3.2			Yamaha	2.1		
Yamaha	3.0	Average	3.3	Piaggio Group	2.0	Average	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY

17a: The routine procedures and controls expected				17b: The quality of your manufacturer's training			
Ducati	4.4	Honda	2.7	Ducati	4.0	Royal Enfield	3.2
Suzuki	3.6	Piaggio Group	2.5	Suzuki	3.9	KTM	3.1
Triumph	3.6	Harley Davidson	2.0	Yamaha	3.8	Piaggio Group	2.6
Kawasaki	3.3			Kawasaki	3.7		
Royal Enfield	3.2			Honda	3.6		
KTM	3.0			Triumph	3.4		
Yamaha	2.9	Average	3.1	Harley Davidson	3.2	Average	3.4

17c: The cost of your manufacturer's training				17d: Your ability to do business with your manufacturer on a day-to-day basis			
Royal Enfield	4.2	KTM	2.7	Royal Enfield	4.4	KTM	3.0
Ducati	4.0	Piaggio Group	2.4	Ducati	4.3	Harley Davidson	2.6
Suzuki	3.8	Harley Davidson	2.0	Honda	4.0	Piaggio Group	2.4
Triumph	3.6			Suzuki	4.0		
Kawasaki	3.3			Triumph	3.8		
Honda	3.2			Kawasaki	3.3		
Yamaha	3.1	Average	3.2	Yamaha	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			
Kawasaki	4.7	KTM	3.1	Ducati	8.9	Kawasaki	4.3
Ducati	4.3	Harley Davidson	3.0	Triumph	8.2	Piaggio Group	4.1
Suzuki	4.0	Piaggio Group	2.4	Royal Enfield	8.0	Harley Davidson	2.4
Honda	3.9			Honda	6.7		
Triumph	3.8			Suzuki	5.6		
Royal Enfield	3.6			KTM	5.4		
Yamaha	3.3	Average	3.5	Yamaha	5.1	Average	5.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2020 SURVEY