



NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY RESULTS

AUTUMN 2017

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY AUTUMN 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 AUTUMN 2017 SURVEY



YAMAHA

Kawasaki



PIAGGIO®



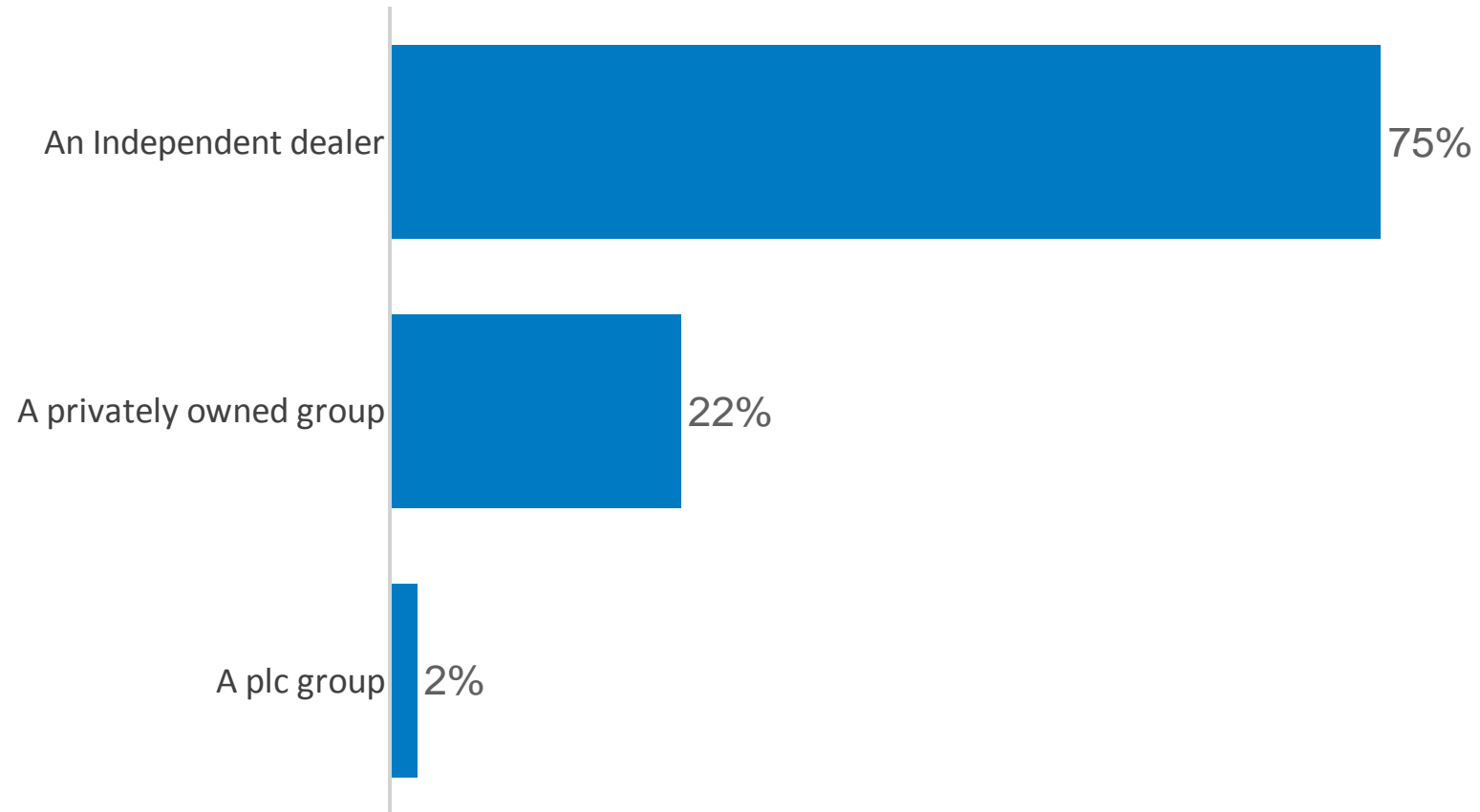
NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

BREAKDOWN OF RESPONSES

FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
DUCATI	12	34	35
HARLEY DAVIDSON	10	29	34
HONDA	46	65	71
KAWASAKI	20	62	32
KTM	17	45	38
PIAGGIO GROUP	23	70	33
SUZUKI	28	101	28
TRIUMPH	21	49	43
YAMAHA	30	113	27
TOTAL	207	568	36

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q2 In this site are you:

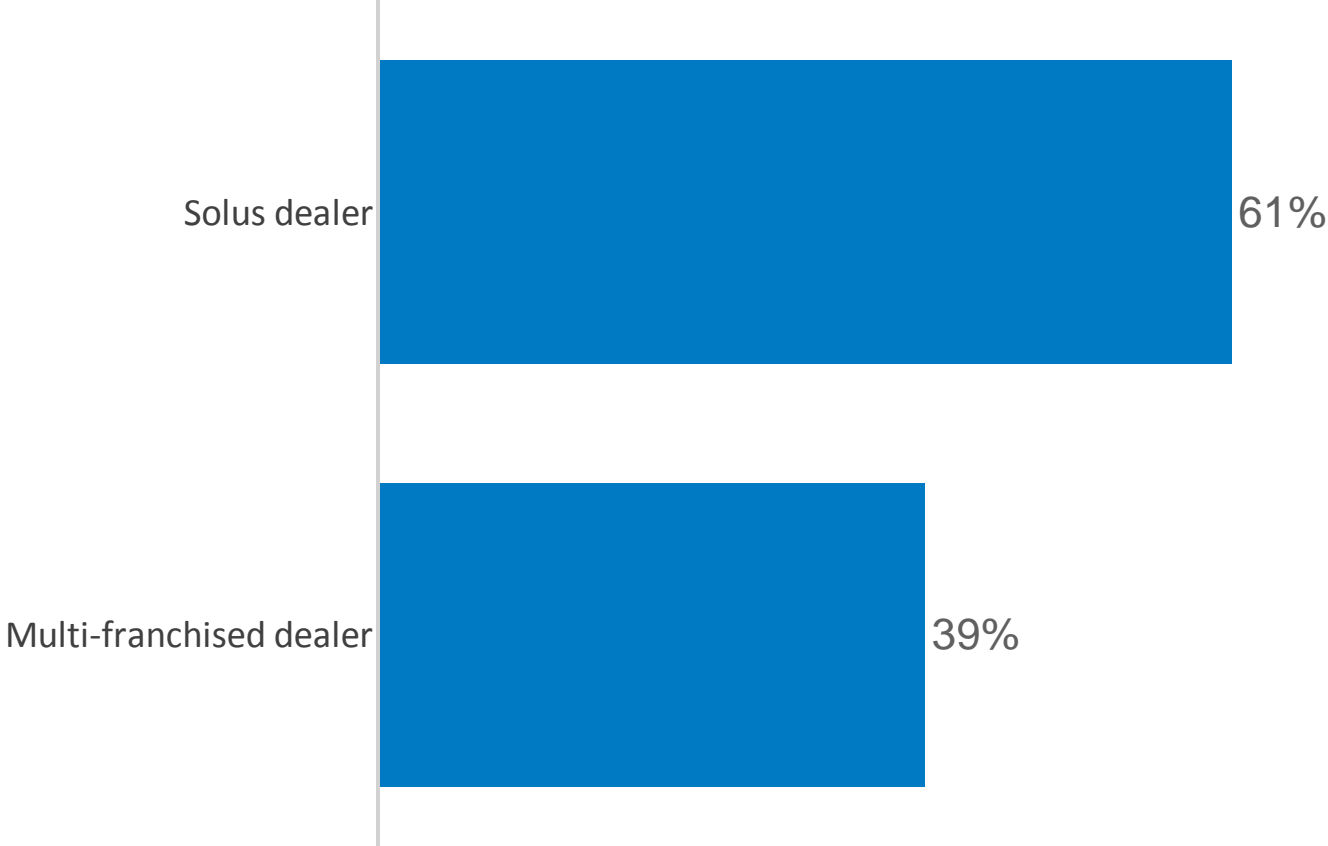


SPRING 2017 SURVEY RESULTS

INDEPENDENT	74%
PRIVATELY OWNED	24%
PLC GROUP	2%

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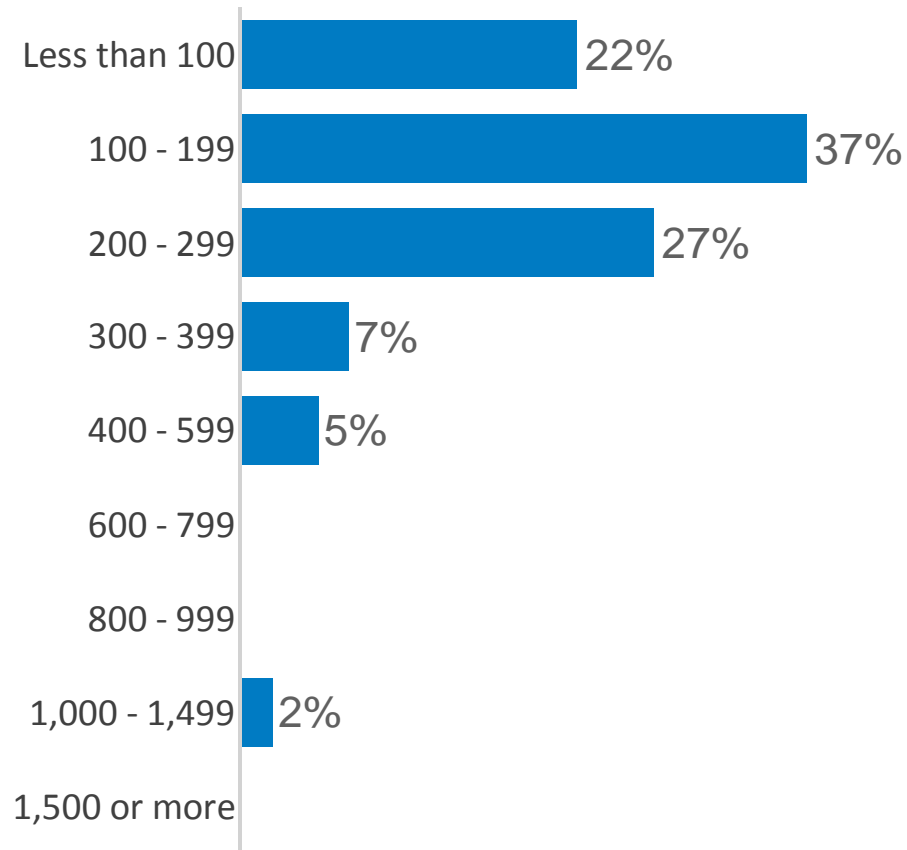
Q3 Is this site:



SPRING 2017 SURVEY RESULTS	
SOLUS	58%
MULTI-FRANCHISED	42%

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q4 How many new motorcycles do you sell per annum?

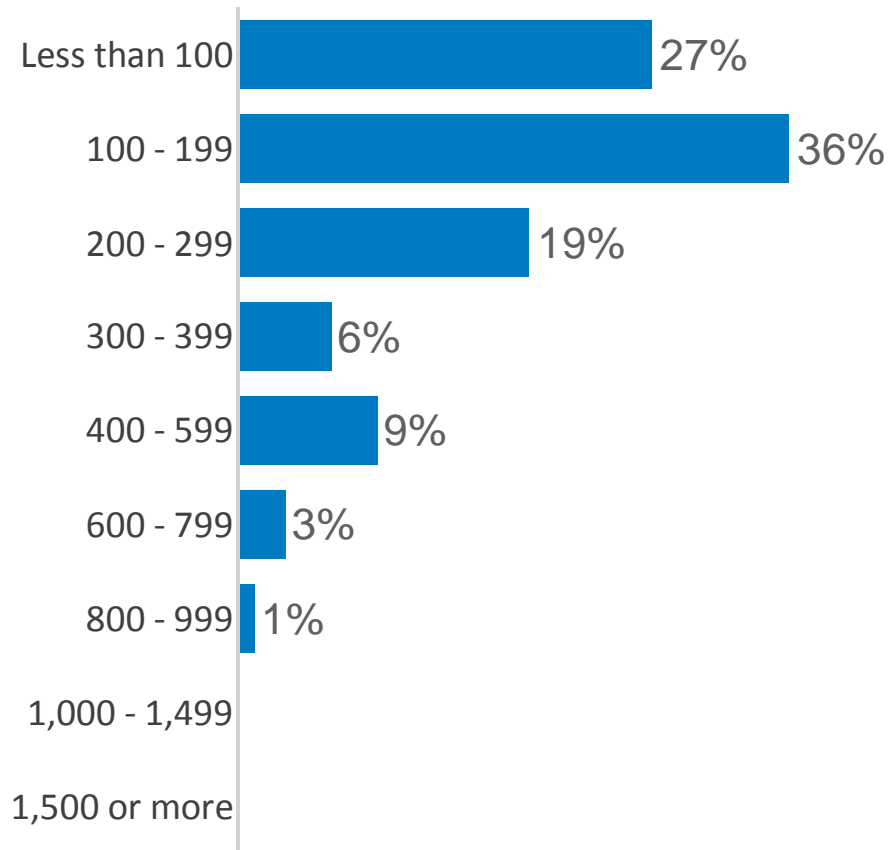


SPRING 2017 SURVEY RESULTS

Less than 100	25%	400 – 599	2%
100 – 199	36%	600 – 799	3%
200 – 299	23%	800 – 999	0%
300 – 399	11%	1000 – 1499	1%
1500 or more	0%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q5 How many used motorcycles do you sell per annum?

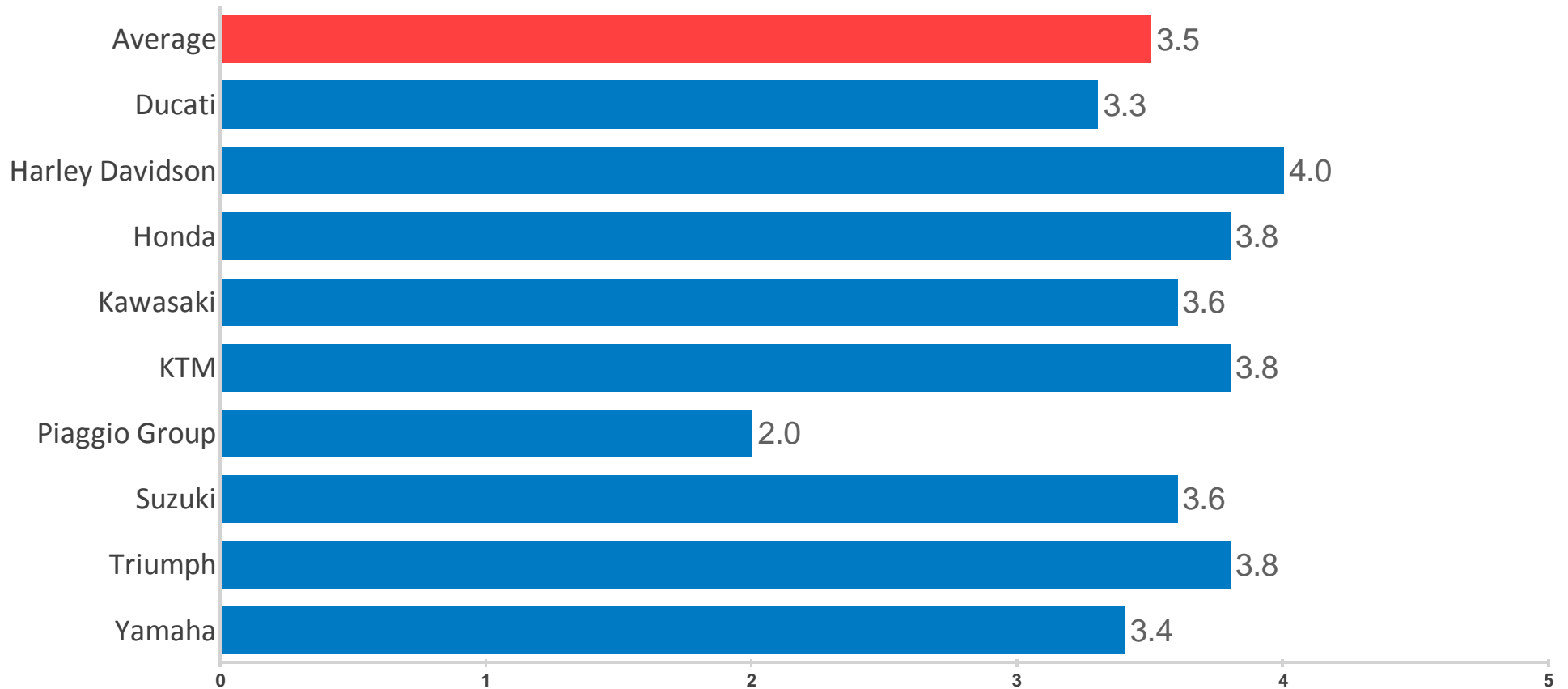


SPRING 2017 SURVEY RESULTS

Less than 100	27%	400 – 599	7%
100 – 199	28%	600 – 799	3%
200 – 299	23%	800 – 999	4%
300 – 399	8%	1000 – 1499	0%
1500 or more	1%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

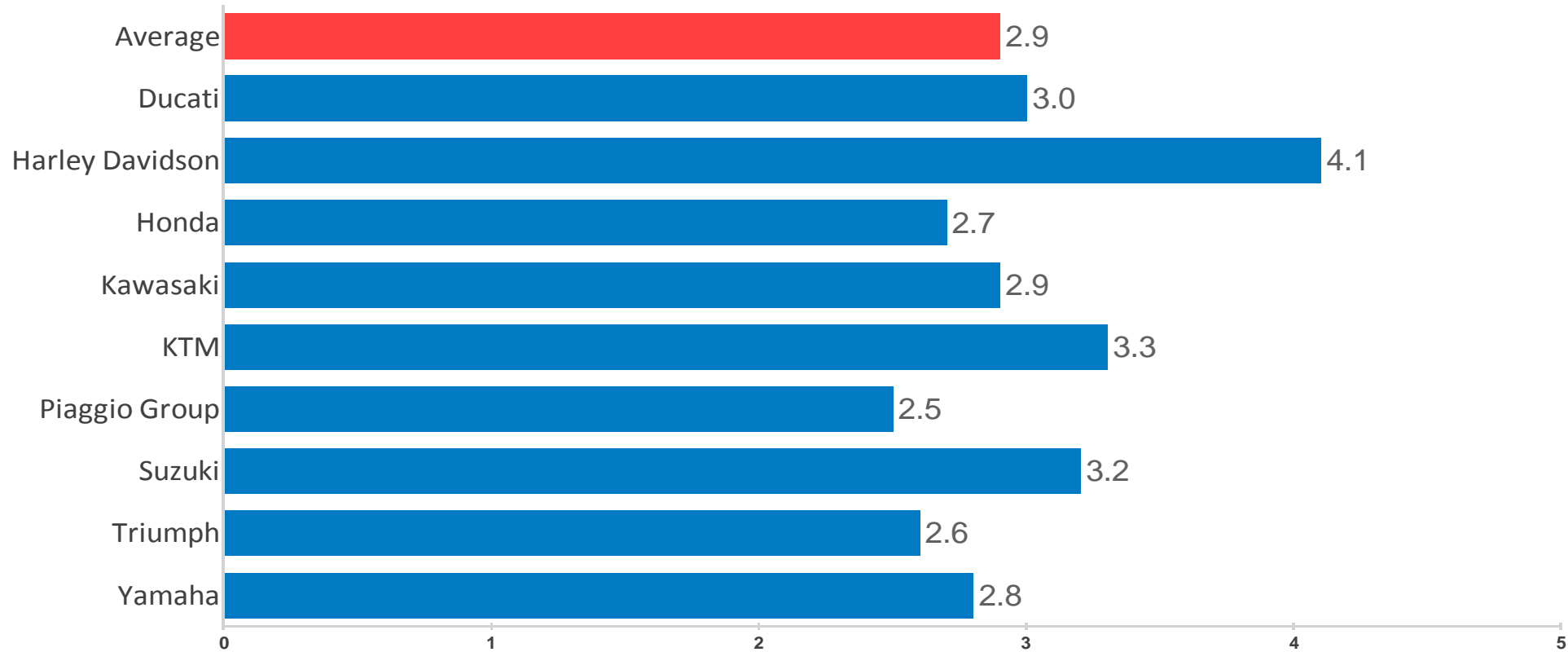


PREVIOUS SURVEY RESULTS – SPRING 2017

6a: The product's price and value against other brands			
Ducati	3.3	Triumph	4.0
Harley Davidson	4.3	Yamaha	3.9
Honda	3.6		
Kawasaki	3.9		
KTM	3.6		
Piaggio Group	2.1		
Suzuki	3.7	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

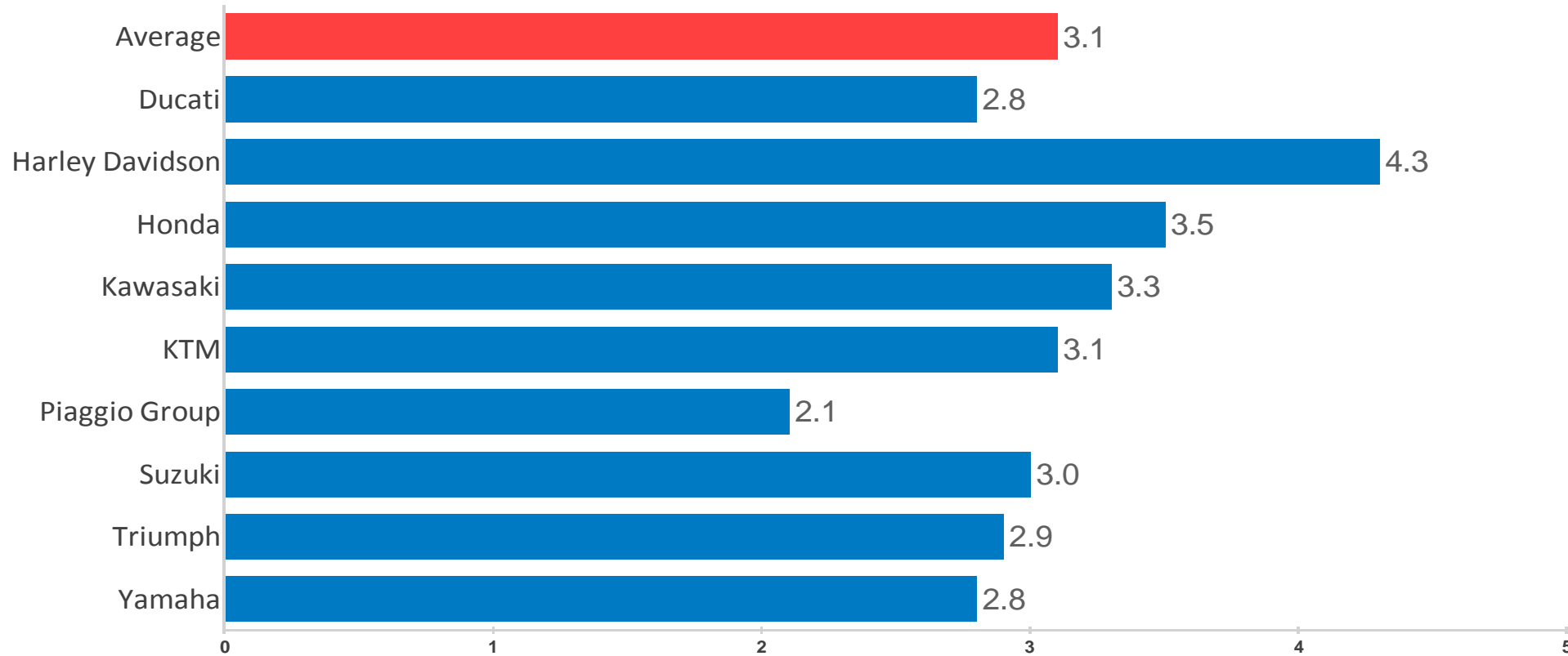


PREVIOUS SURVEY RESULTS – SPRING 2017

6b: How realistic is your target and performance related bonus in terms of achievement			
Ducati	2.5	Triumph	3.2
Harley Davidson	3.7	Yamaha	3.5
Honda	2.8		
Kawasaki	3.4		
KTM	3.5		
Piaggio Group	2.3		
Suzuki	3.3	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

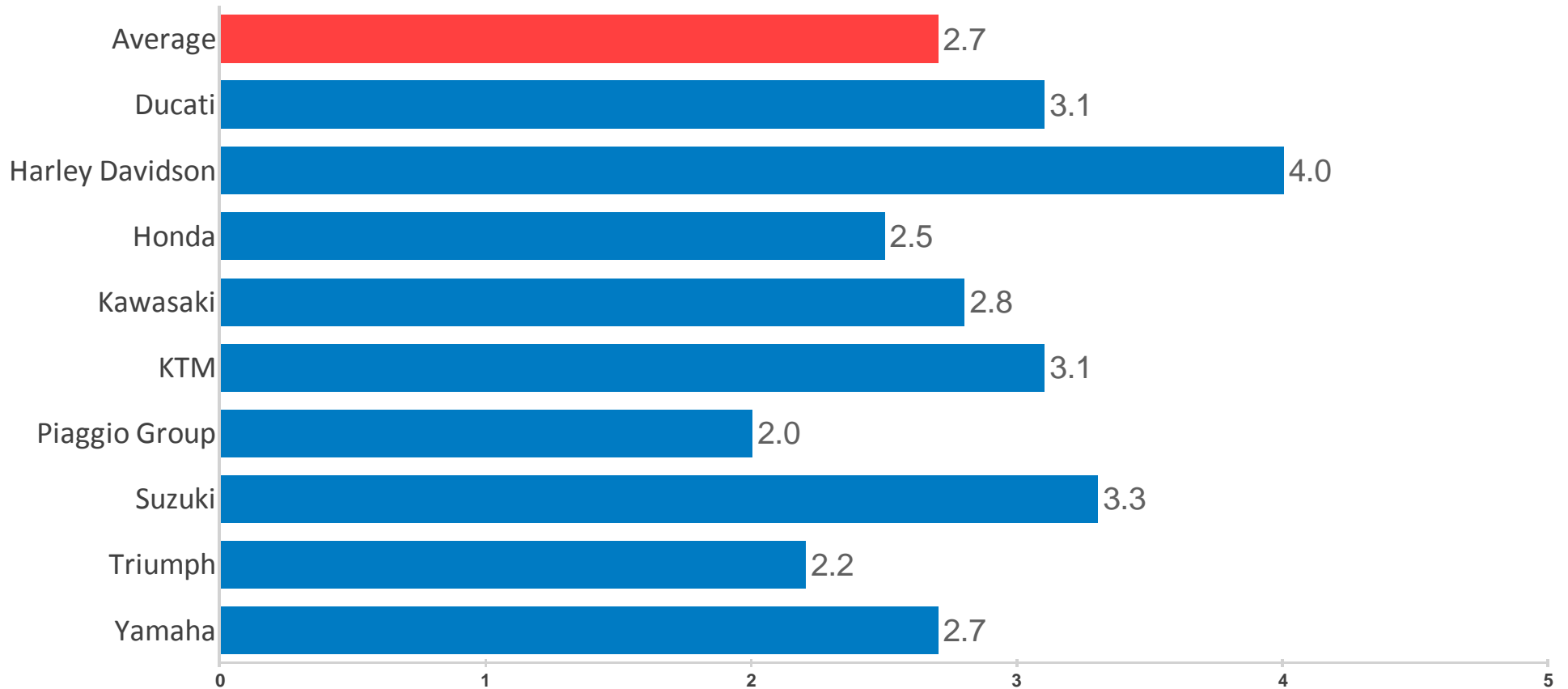


PREVIOUS SURVEY RESULTS – SPRING 2017

7a: The fairness of your manufacturer's policy for the supply and stocking of motorcycles			
Ducati	3.2	Triumph	3.4
Harley Davidson	3.9	Yamaha	2.6
Honda	3.0		
Kawasaki	3.4		
KTM	3.8		
Piaggio Group	2.2		
Suzuki	3.0	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q7 b) The new motorcycle target negotiating process

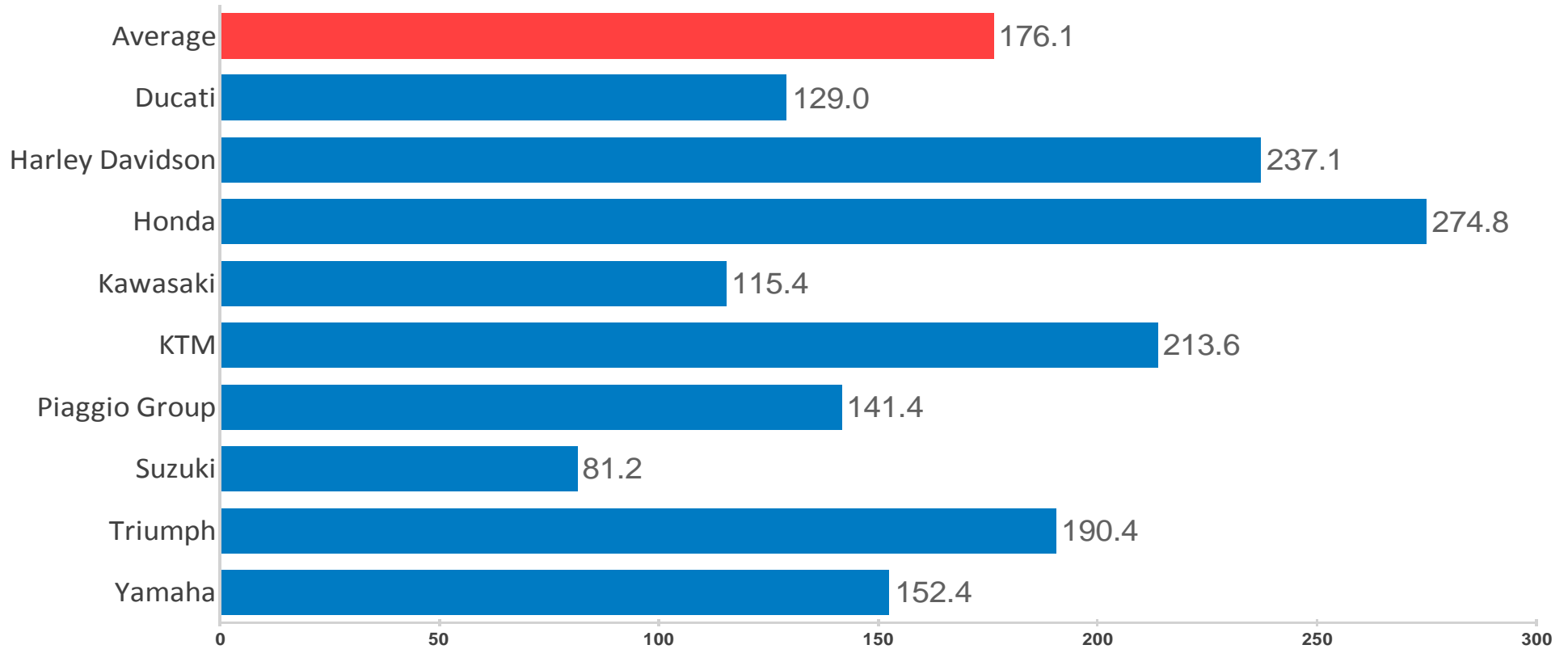


PREVIOUS SURVEY RESULTS – SPRING 2017

7b: Your new motorcycle target negotiating process			
Ducati	3.7	Triumph	2.7
Harley Davidson	3.7	Yamaha	3.0
Honda	2.1		
Kawasaki	2.8		
KTM	3.2		
Piaggio Group	2.3		
Suzuki	3.4	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q7c) What is your annual target for this brand?

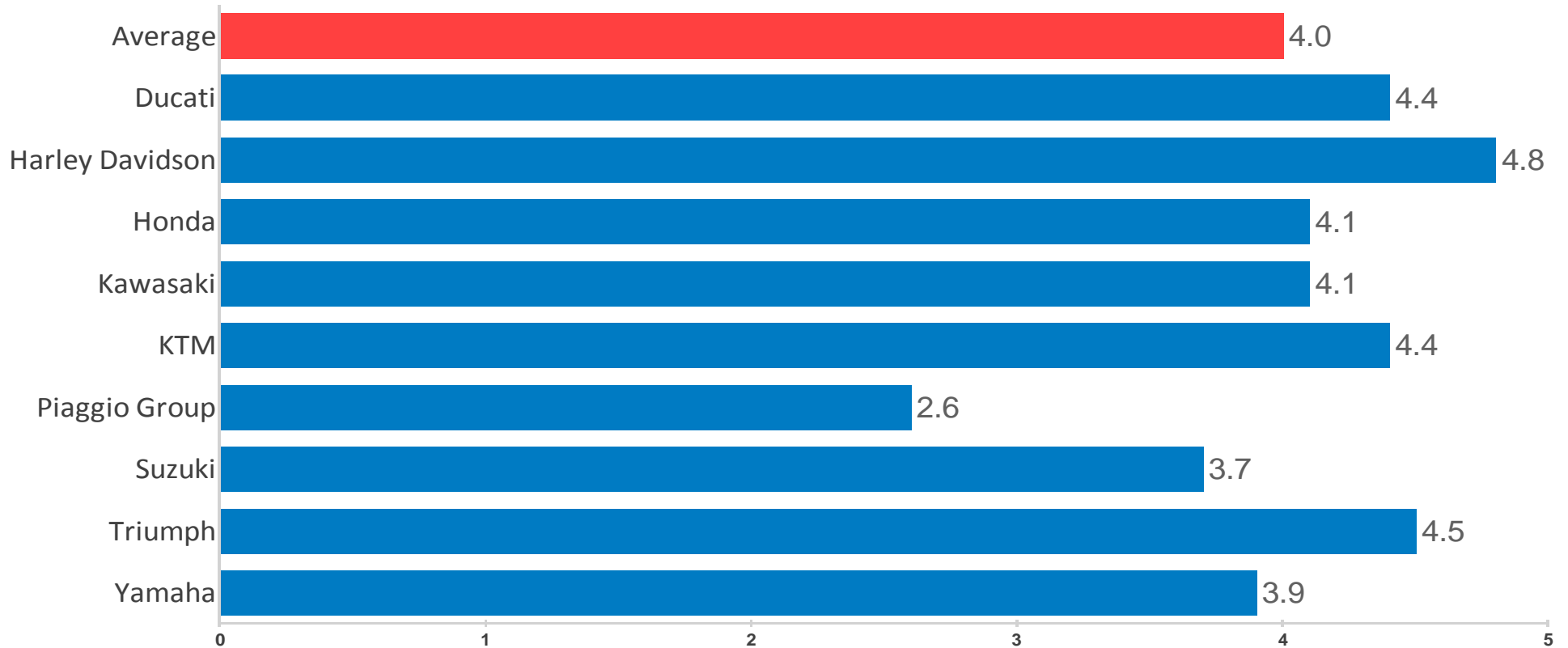


PREVIOUS SURVEY RESULTS – SPRING 2017

7c: What is your annual target for this brand			
Ducati	103.0	Triumph	168.4
Harley Davidson	200.6	Yamaha	141.3
Honda	324.9		
Kawasaki	136.5		
KTM	198.8		
Piaggio Group	131.2		
Suzuki	95.7	AVERAGE	182.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q8 a) The brand image

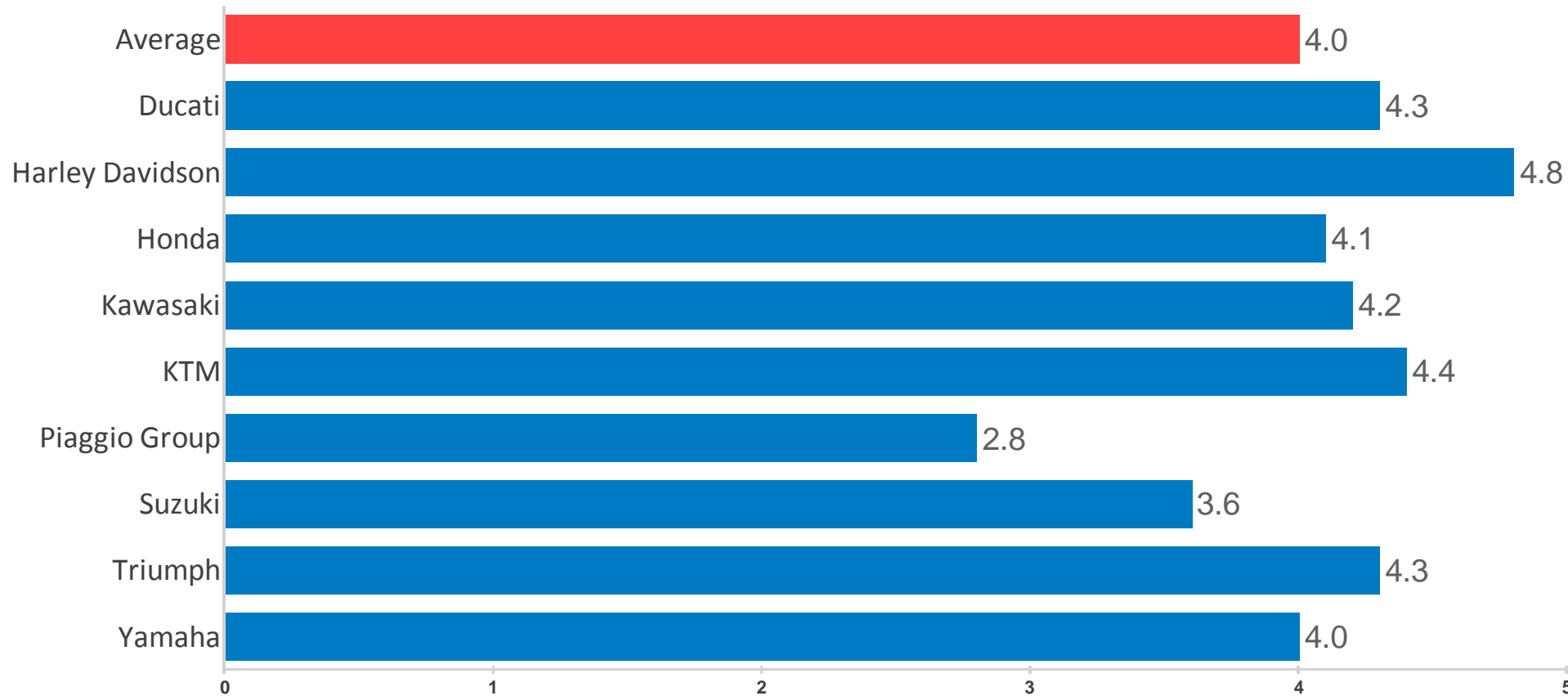


PREVIOUS SURVEY RESULTS – SPRING 2017

8a: The brand image			
Ducati	4.3	Triumph	4.7
Harley Davidson	4.8	Yamaha	4.2
Honda	4.1		
Kawasaki	4.1		
KTM	4.3		
Piaggio Group	3.0		
Suzuki	3.9	AVERAGE	4.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q8 b) The product image

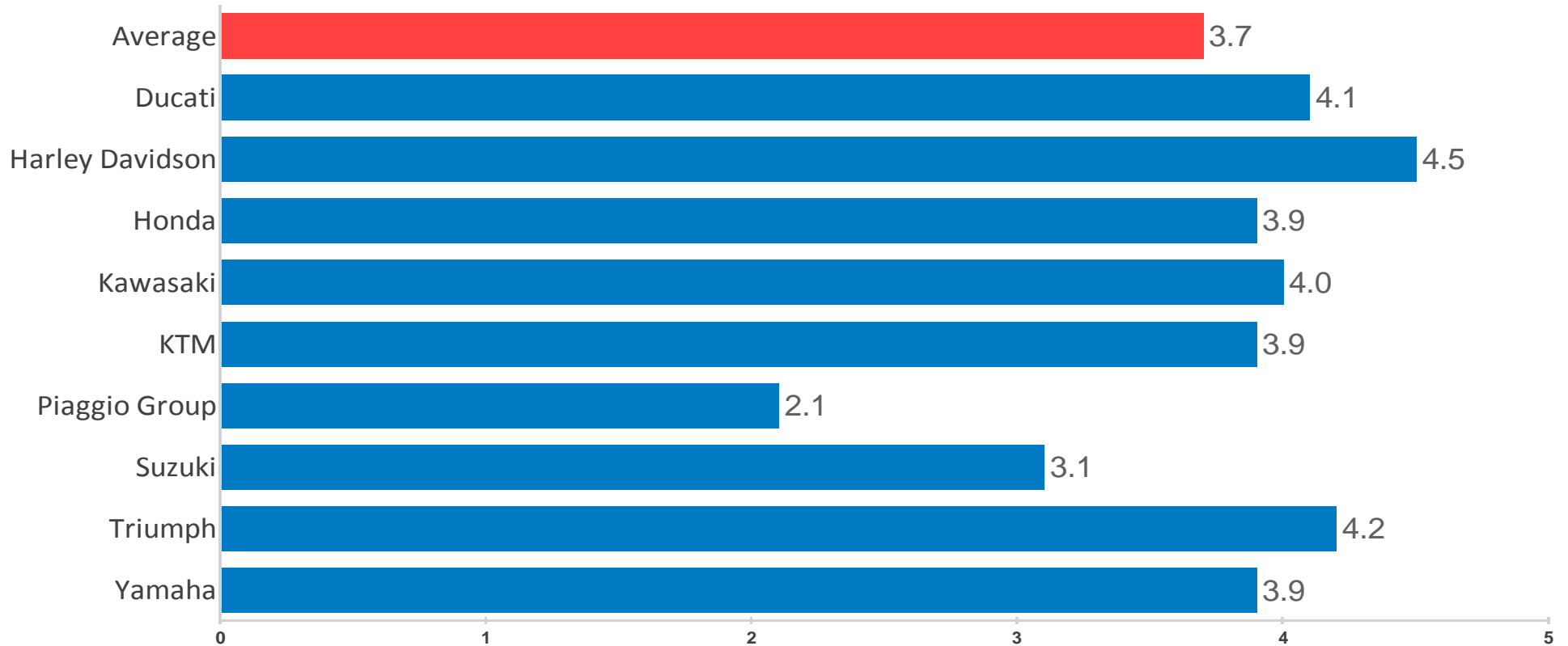


PREVIOUS SURVEY RESULTS – SPRING 2017

8b: The product image			
Ducati	4.3	Triumph	4.5
Harley Davidson	4.7	Yamaha	4.2
Honda	4.2		
Kawasaki	4.3		
KTM	4.3		
Piaggio Group	3.1		
Suzuki	3.9	AVERAGE	4.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q8 c) Frequency of introduction of new models

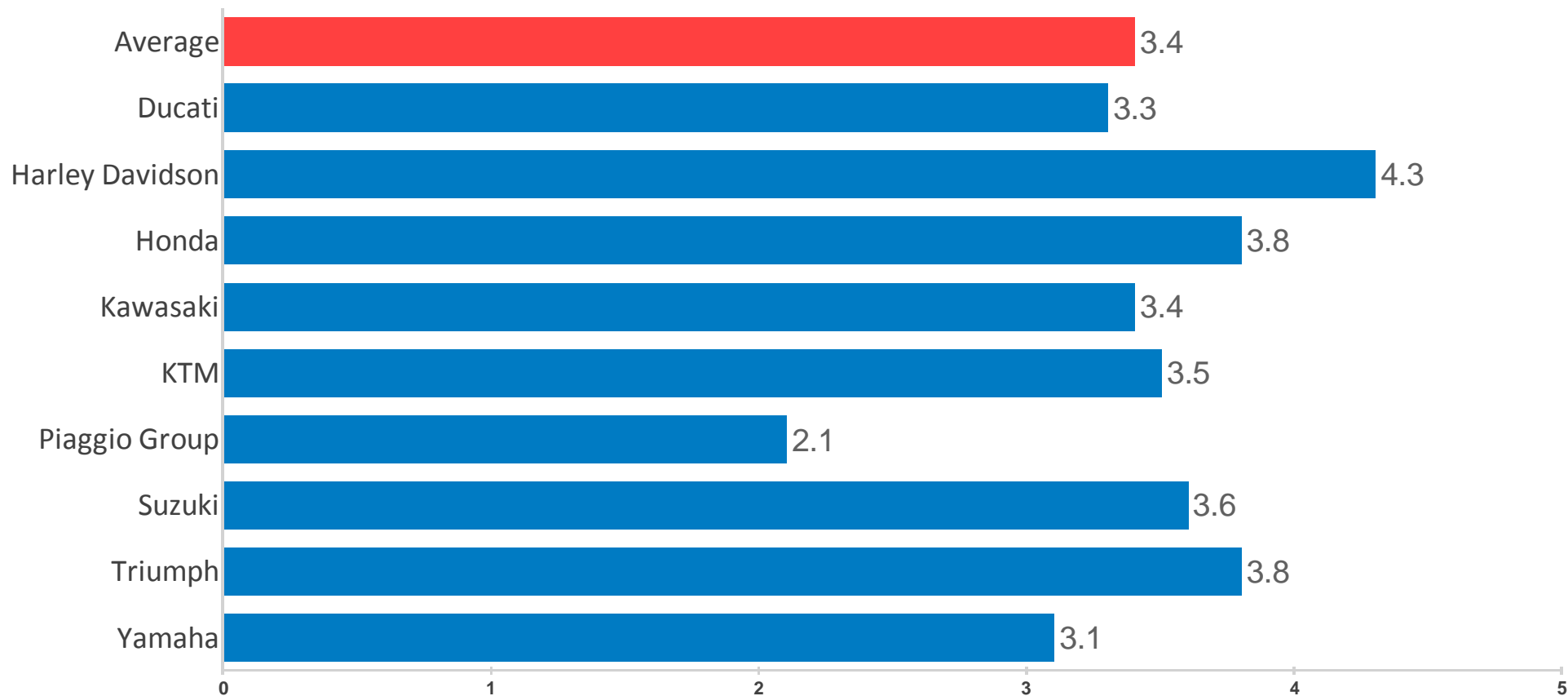


PREVIOUS SURVEY RESULTS – SPRING 2017

8c: Frequency of introduction of new models			
Ducati	4.7	Triumph	4.7
Harley Davidson	4.4	Yamaha	4.1
Honda	3.8		
Kawasaki	4.3		
KTM	4.0		
Piaggio Group	2.5		
Suzuki	3.0	AVERAGE	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q8 d) Retail sales incentives and promotions

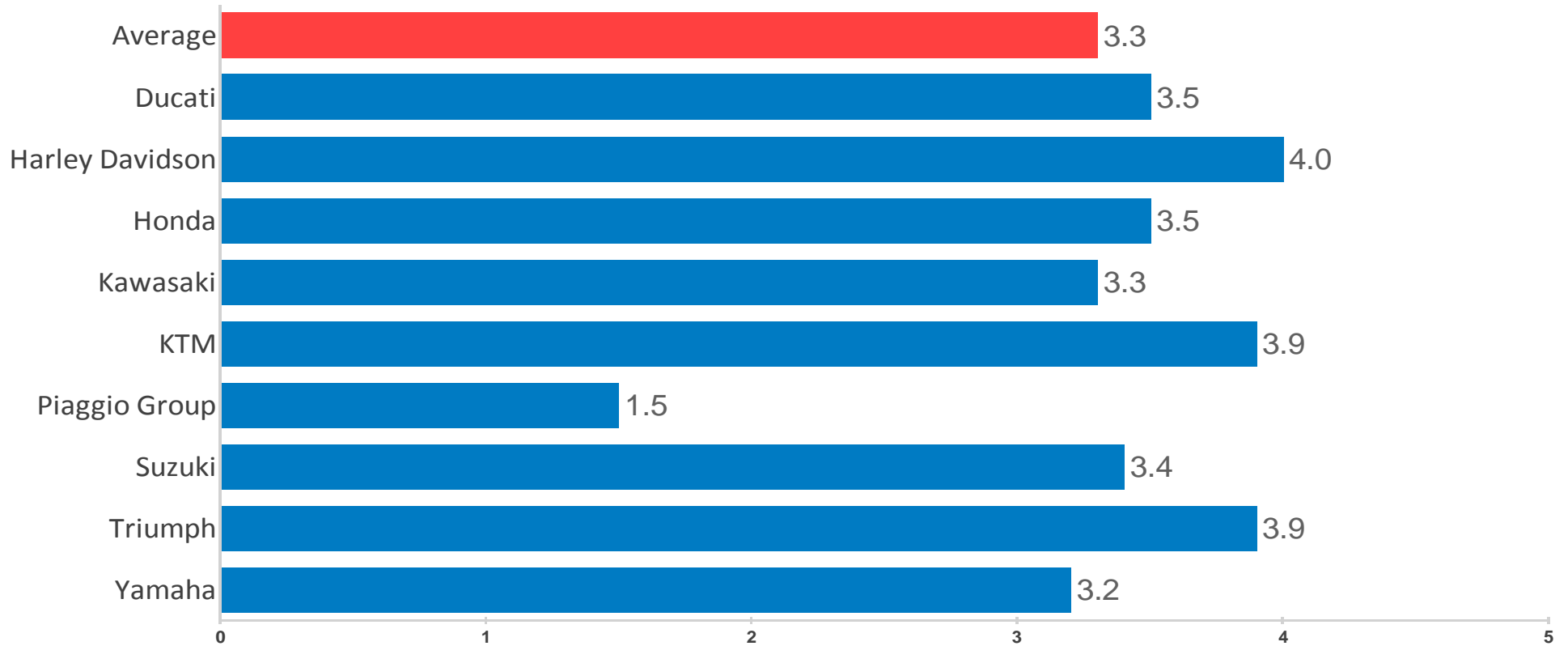


PREVIOUS SURVEY RESULTS – SPRING 2017

8d: Retail sales incentives and promotions			
Ducati	3.3	Triumph	3.7
Harley Davidson	3.9	Yamaha	3.2
Honda	3.3		
Kawasaki	3.9		
KTM	3.3		
Piaggio Group	2.2		
Suzuki	3.6	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q8 e) Product advertising

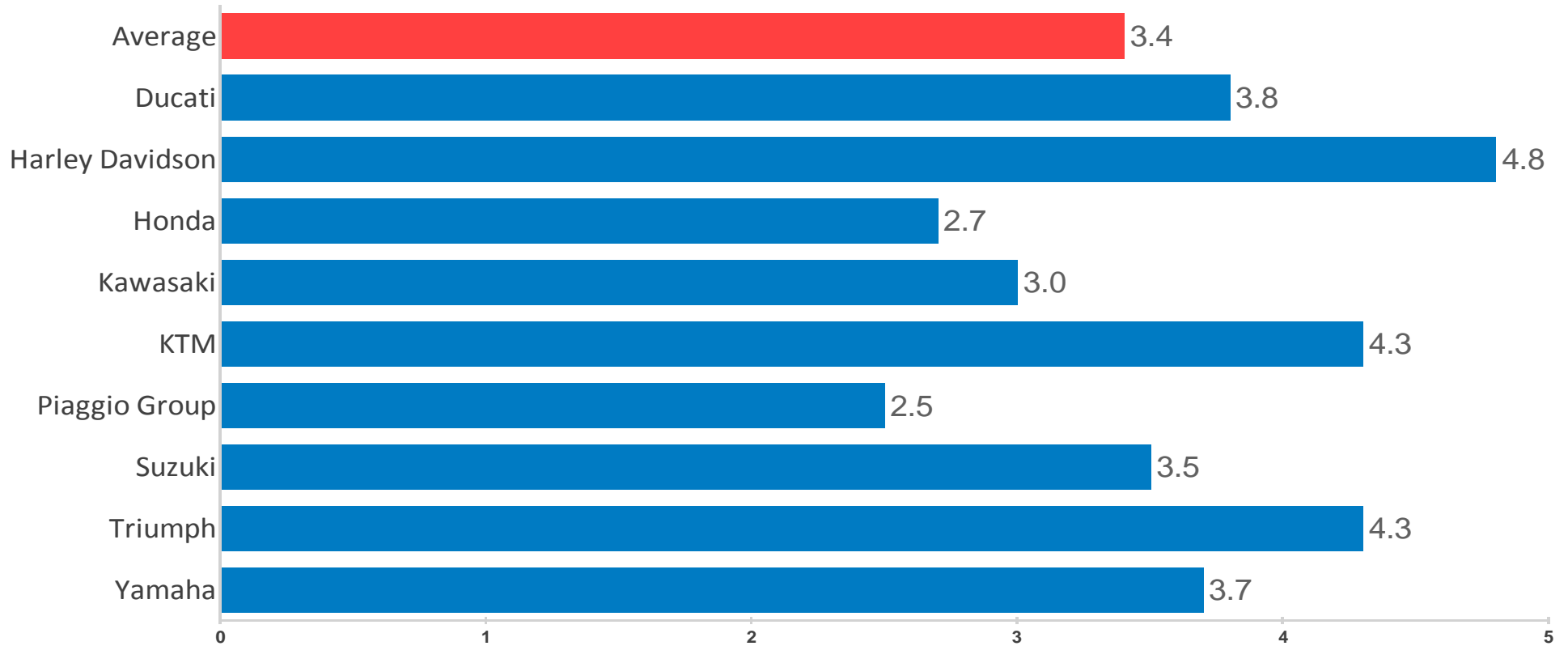


PREVIOUS SURVEY RESULTS – SPRING 2017

8e: Product advertising			
Ducati	3.8	Triumph	3.7
Harley Davidson	3.9	Yamaha	3.4
Honda	3.2		
Kawasaki	3.6		
KTM	3.7		
Piaggio Group	1.9		
Suzuki	3.7	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

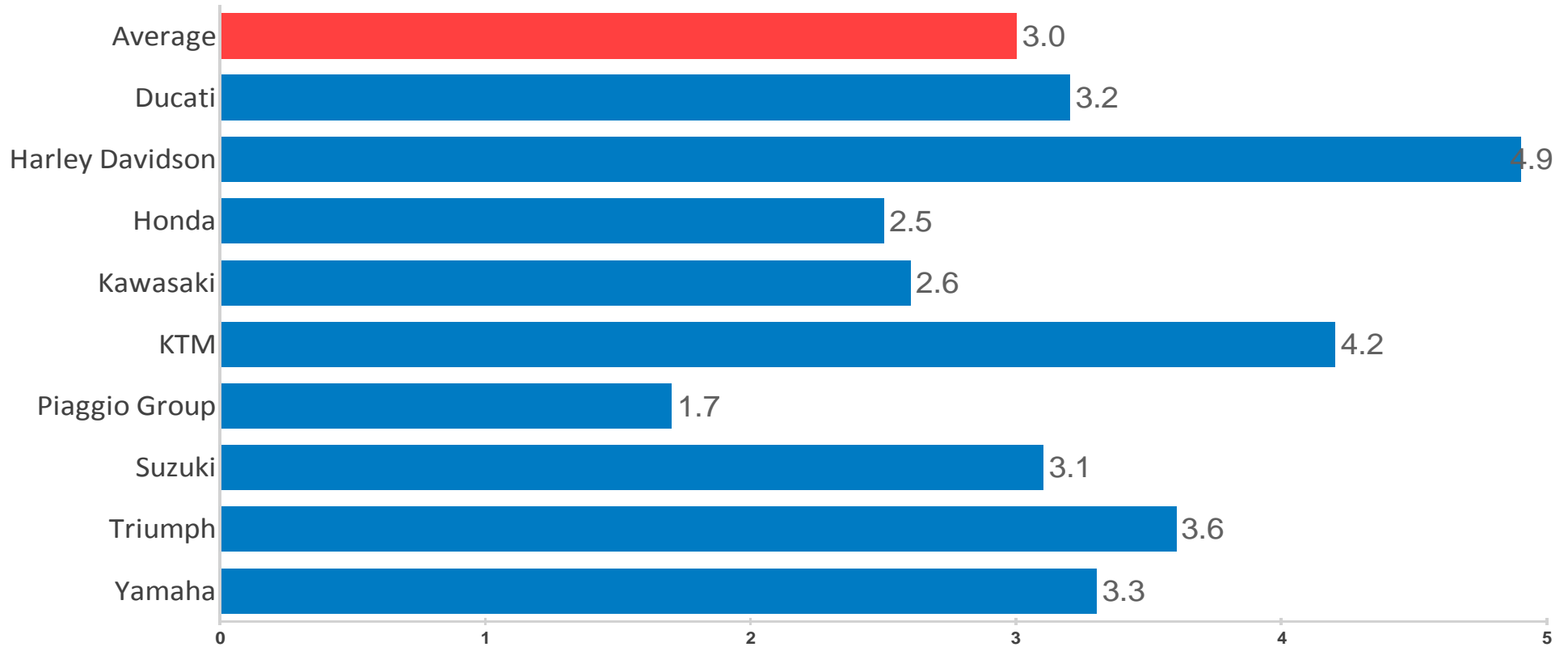


PREVIOUS SURVEY RESULTS – SPRING 2017

8f: Have a comprehensive accessory offering that appeals to customers			
Ducati	4.2	Triumph	4.0
Harley Davidson	4.7	Yamaha	4.0
Honda	2.1		
Kawasaki	3.3		
KTM	4.1		
Piaggio Group	2.7		
Suzuki	3.7	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

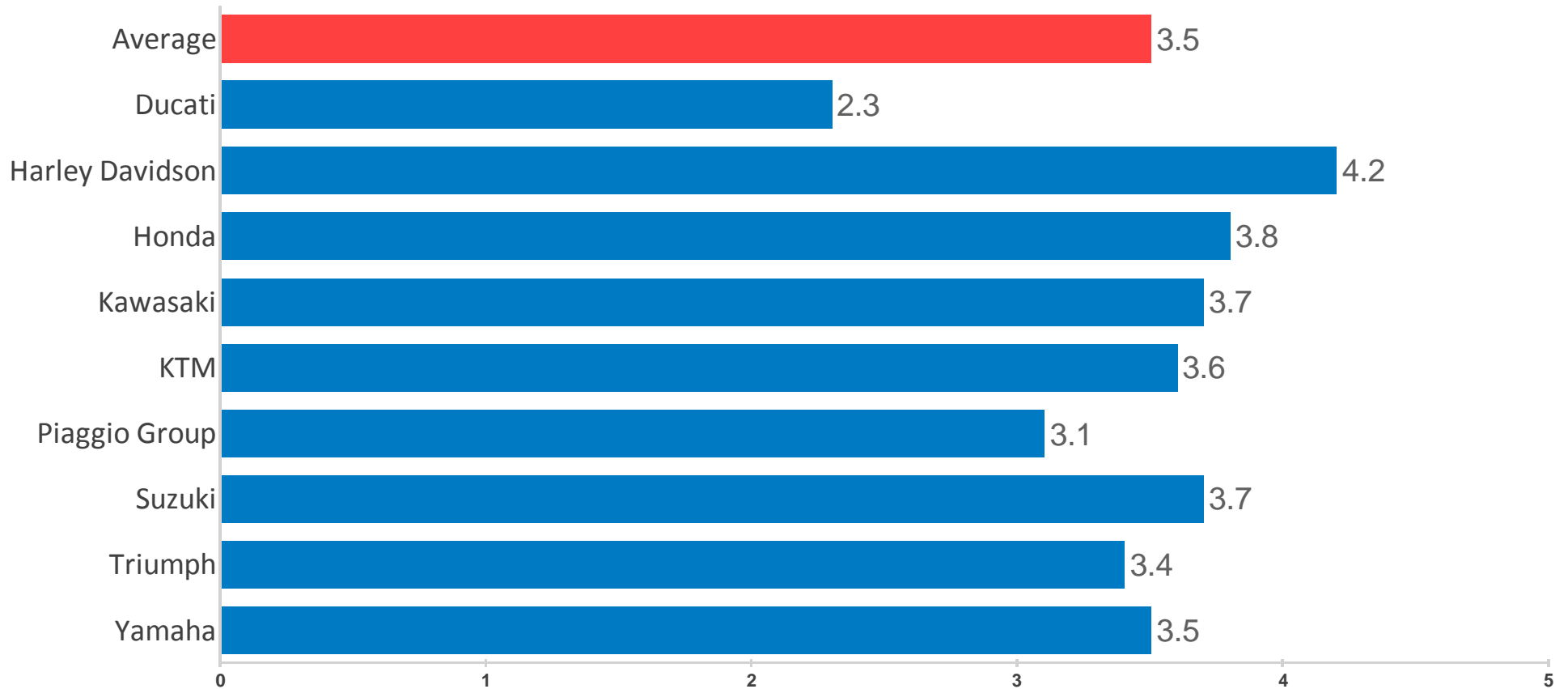


PREVIOUS SURVEY RESULTS – SPRING 2017

8g: Have a comprehensive clothing offering that appeals to customers			
Ducati	3.3	Triumph	3.2
Harley Davidson	4.6	Yamaha	3.3
Honda	2.0		
Kawasaki	2.6		
KTM	3.8		
Piaggio Group	2.2		
Suzuki	3.7	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

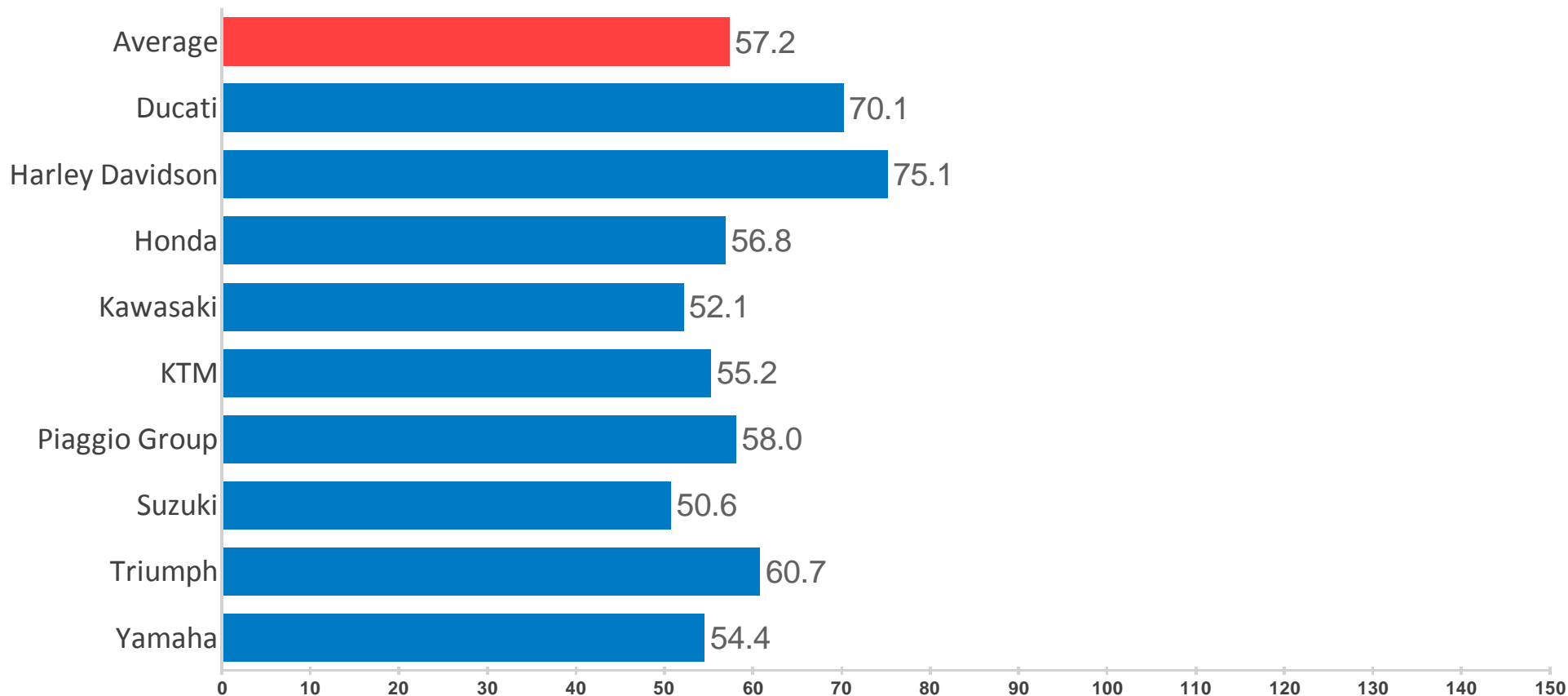


PREVIOUS SURVEY RESULTS – SPRING 2017

9: The fairness of your manufacturer's warranty policy			
Ducati	2.3	Triumph	3.7
Harley Davidson	3.4	Yamaha	3.8
Honda	3.9		
Kawasaki	3.3		
KTM	4.0		
Piaggio Group	2.5		
Suzuki	3.6	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

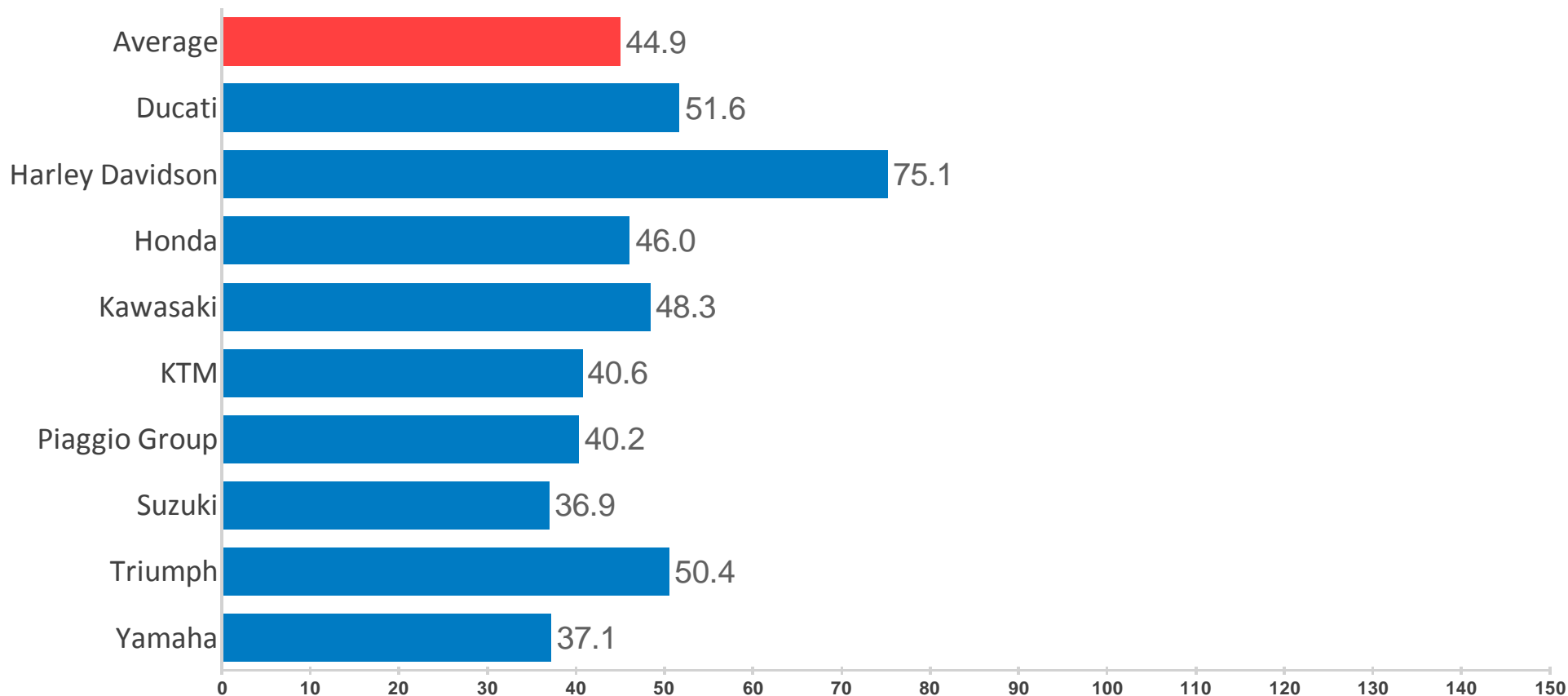


PREVIOUS SURVEY RESULTS – SPRING 2017

10: What is your labour rate for retail (£)			
Ducati	62.5	Triumph	61.6
Harley Davidson	80.6	Yamaha	53.7
Honda	55.8		
Kawasaki	55.3		
KTM	50.4		
Piaggio Group	57.3		
Suzuki	51.3	AVERAGE	56.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

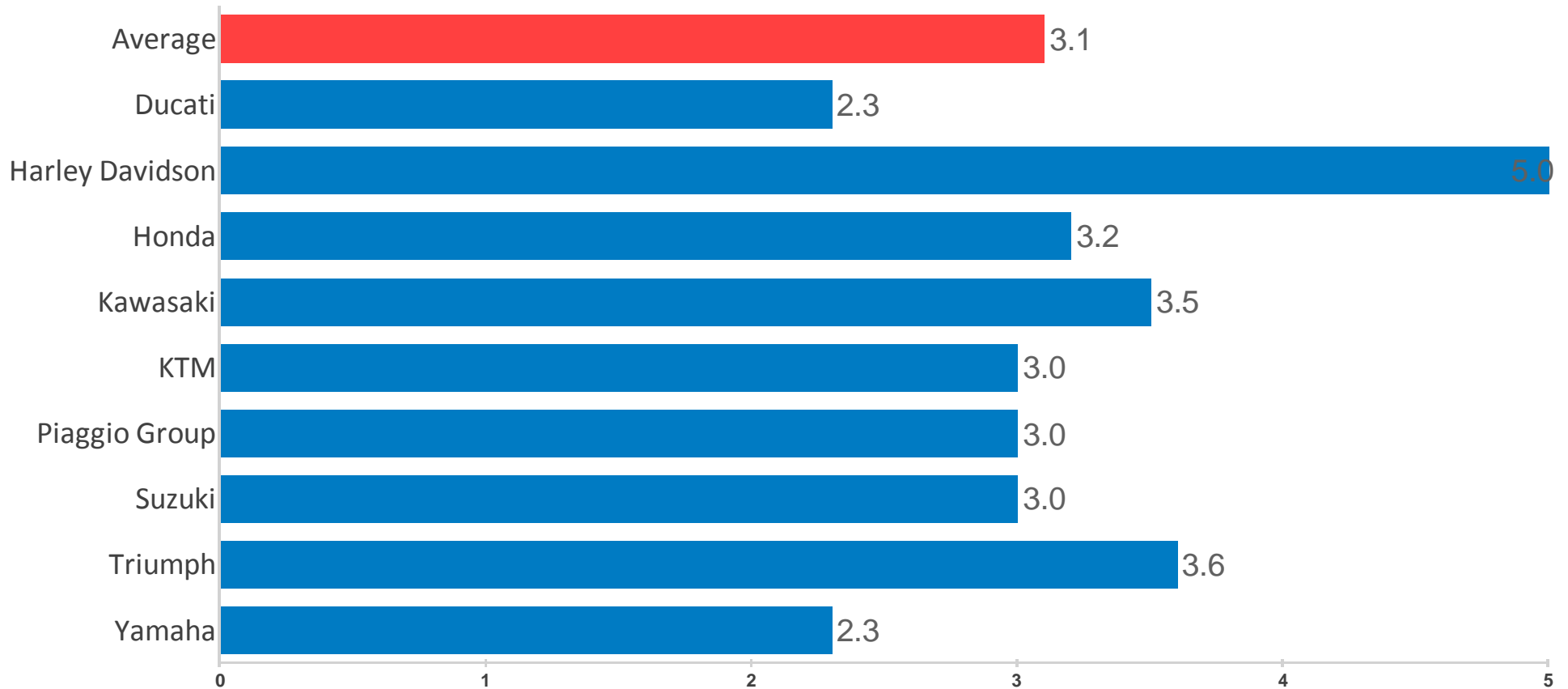


PREVIOUS SURVEY RESULTS – SPRING 2017

11. What is your labour rate for warranty (£)			
Ducati	48.3	Triumph	53.1
Harley Davidson	78.5	Yamaha	37.9
Honda	45.0		
Kawasaki	52.1		
KTM	39.4		
Piaggio Group	39.0		
Suzuki	37.1	AVERAGE	44.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q12 a) Warranty labour rate

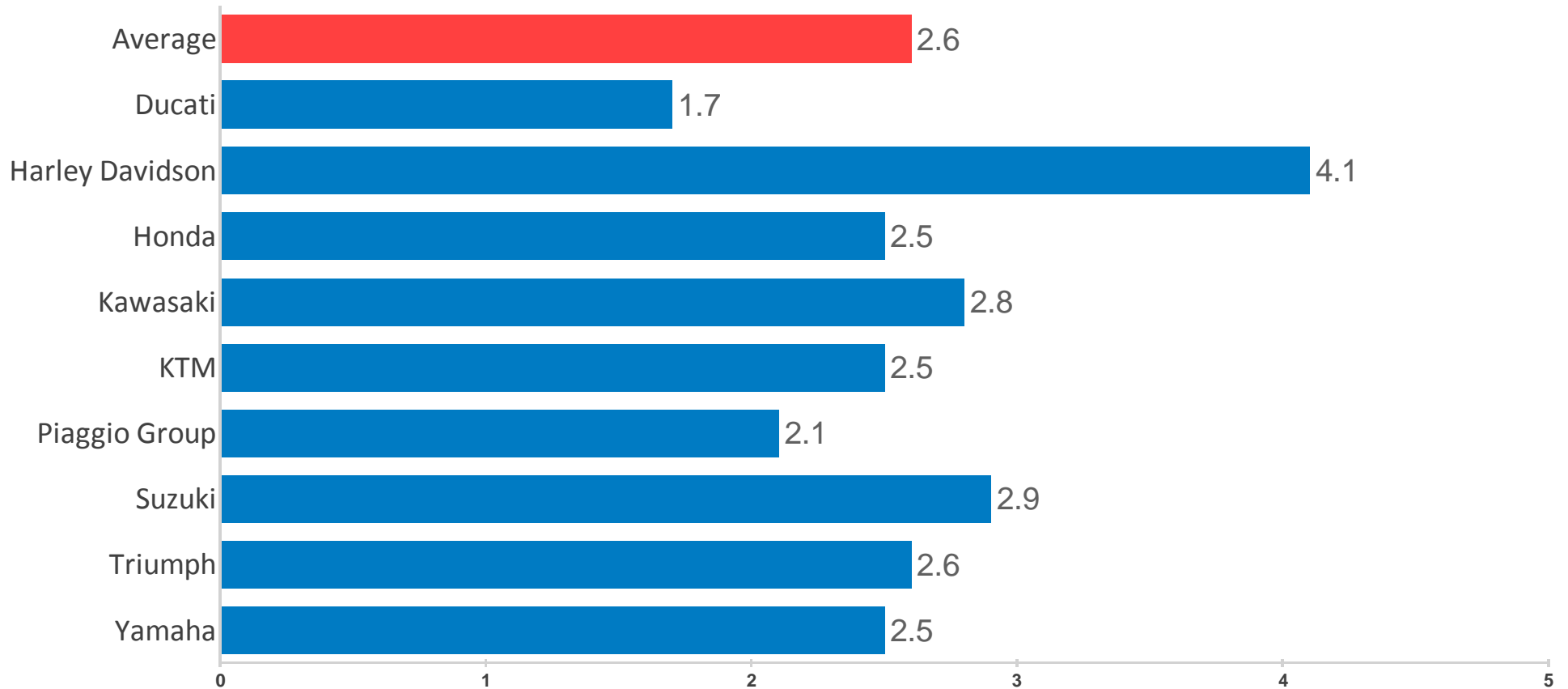


PREVIOUS SURVEY RESULTS – SPRING 2017

12a: Warranty labour rate			
Ducati	2.8	Triumph	3.6
Harley Davidson	4.0	Yamaha	2.4
Honda	3.1		
Kawasaki	3.8		
KTM	3.2		
Piaggio Group	2.3		
Suzuki	3.2	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q12 b) Warranty time allowances

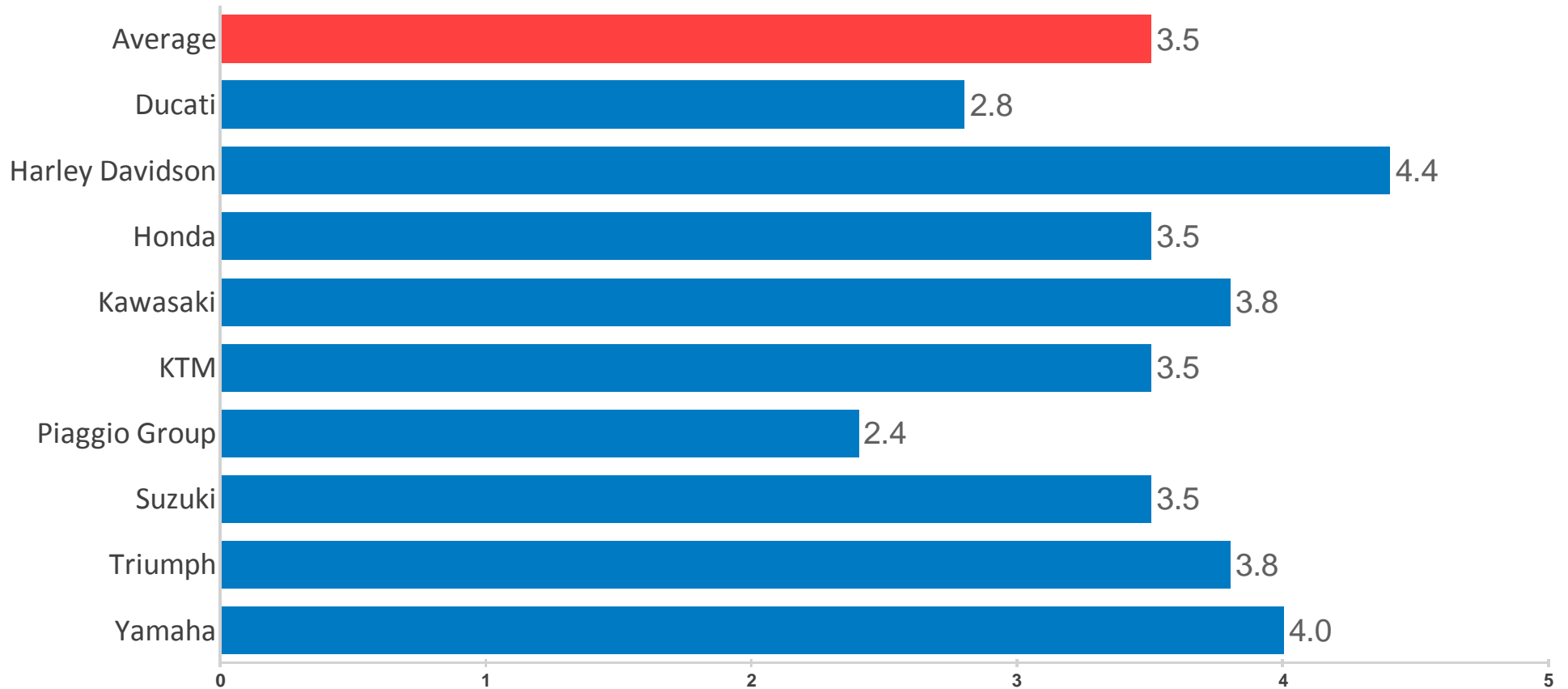


PREVIOUS SURVEY RESULTS – SPRING 2017

12b: Warranty time allowances			
Ducati	2.0	Triumph	2.0
Harley Davidson	3.0	Yamaha	2.4
Honda	2.6		
Kawasaki	3.1		
KTM	2.9		
Piaggio Group	1.9		
Suzuki	3.0	AVERAGE	2.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q12 c) Warranty replacement parts policy

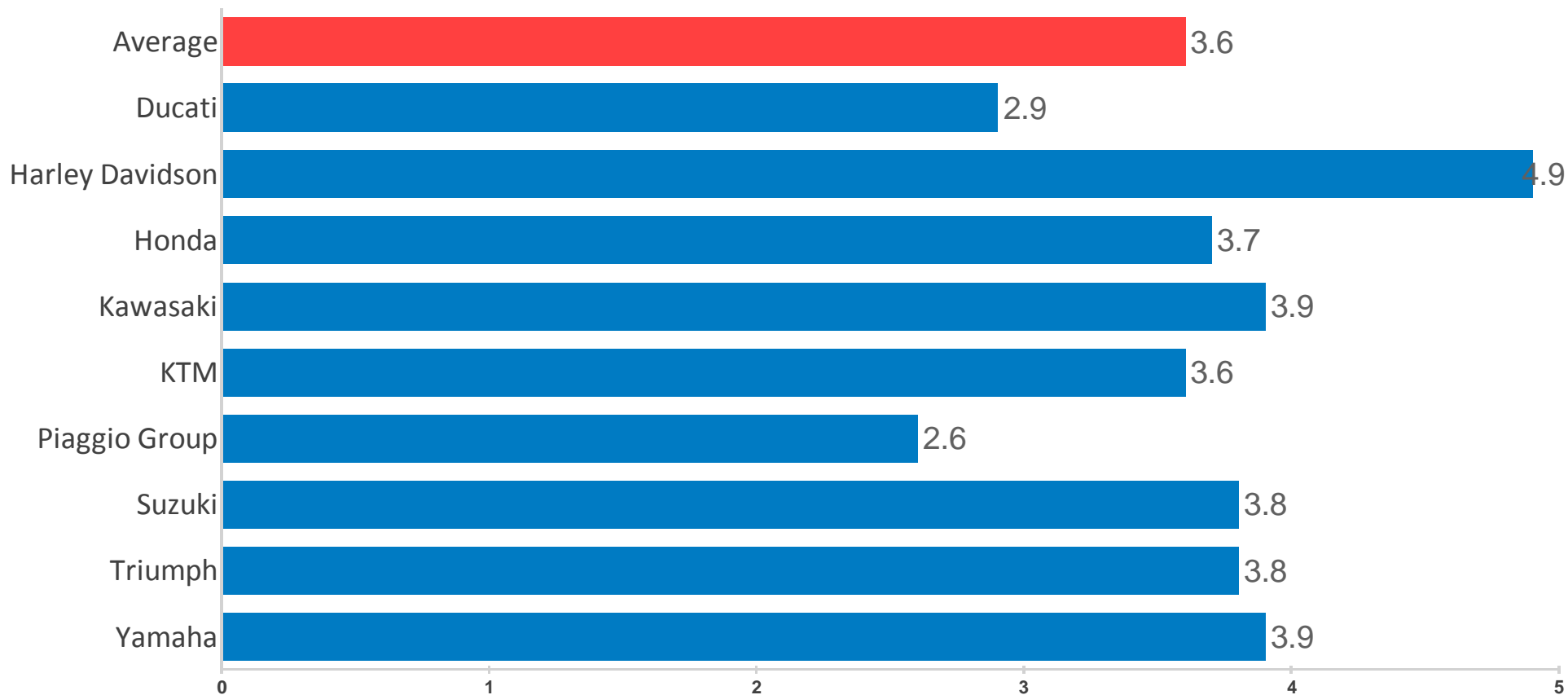


PREVIOUS SURVEY RESULTS – SPRING 2017

12c: Warranty replacement parts policy			
Ducati	3.5	Triumph	3.4
Harley Davidson	3.4	Yamaha	4.0
Honda	3.4		
Kawasaki	3.6		
KTM	3.9		
Piaggio Group	2.8		
Suzuki	3.7	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q12 d) Timely and fair settlement of warranty claims

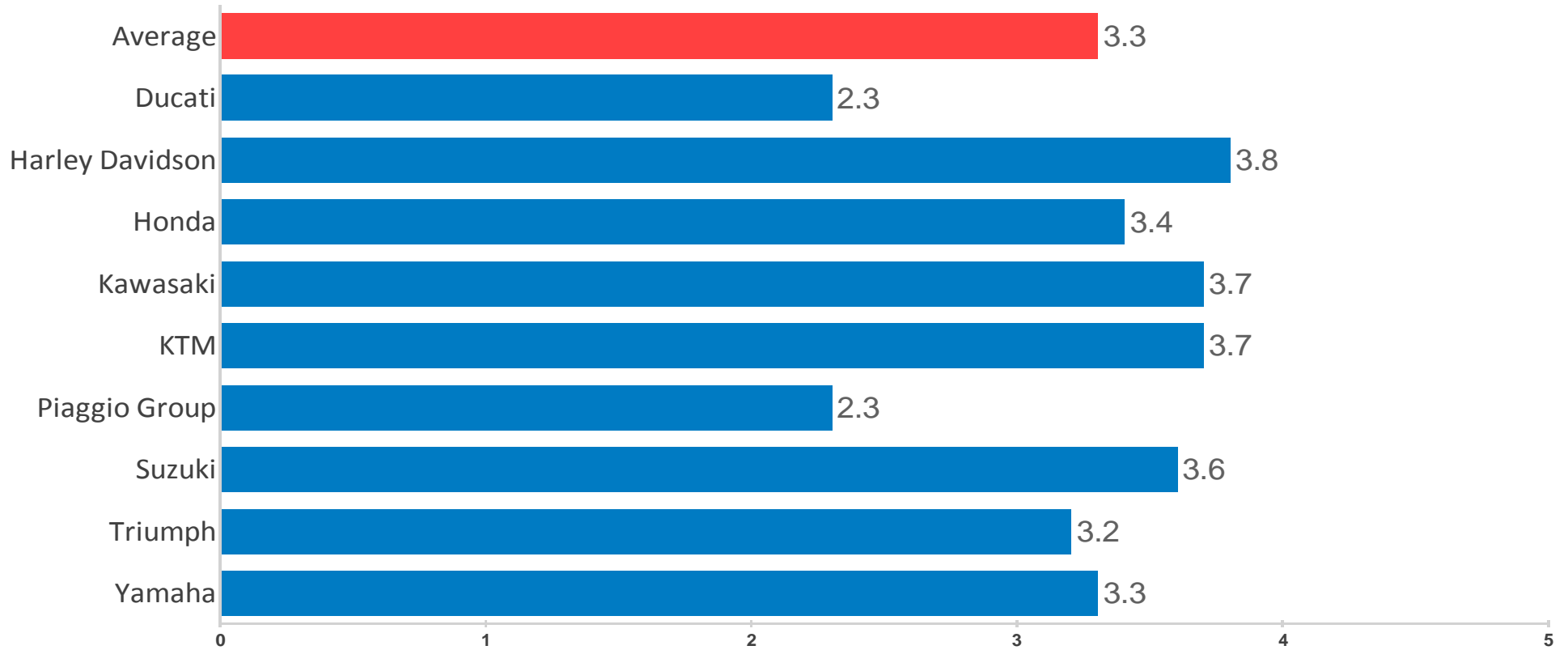


PREVIOUS SURVEY RESULTS – SPRING 2017

12d: Timely and fair settlement of warranty claims			
Ducati	3.2	Triumph	3.7
Harley Davidson	3.7	Yamaha	4.0
Honda	3.7		
Kawasaki	4.3		
KTM	3.7		
Piaggio Group	2.2		
Suzuki	4.0	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q12 e) Quality and availability of technical support

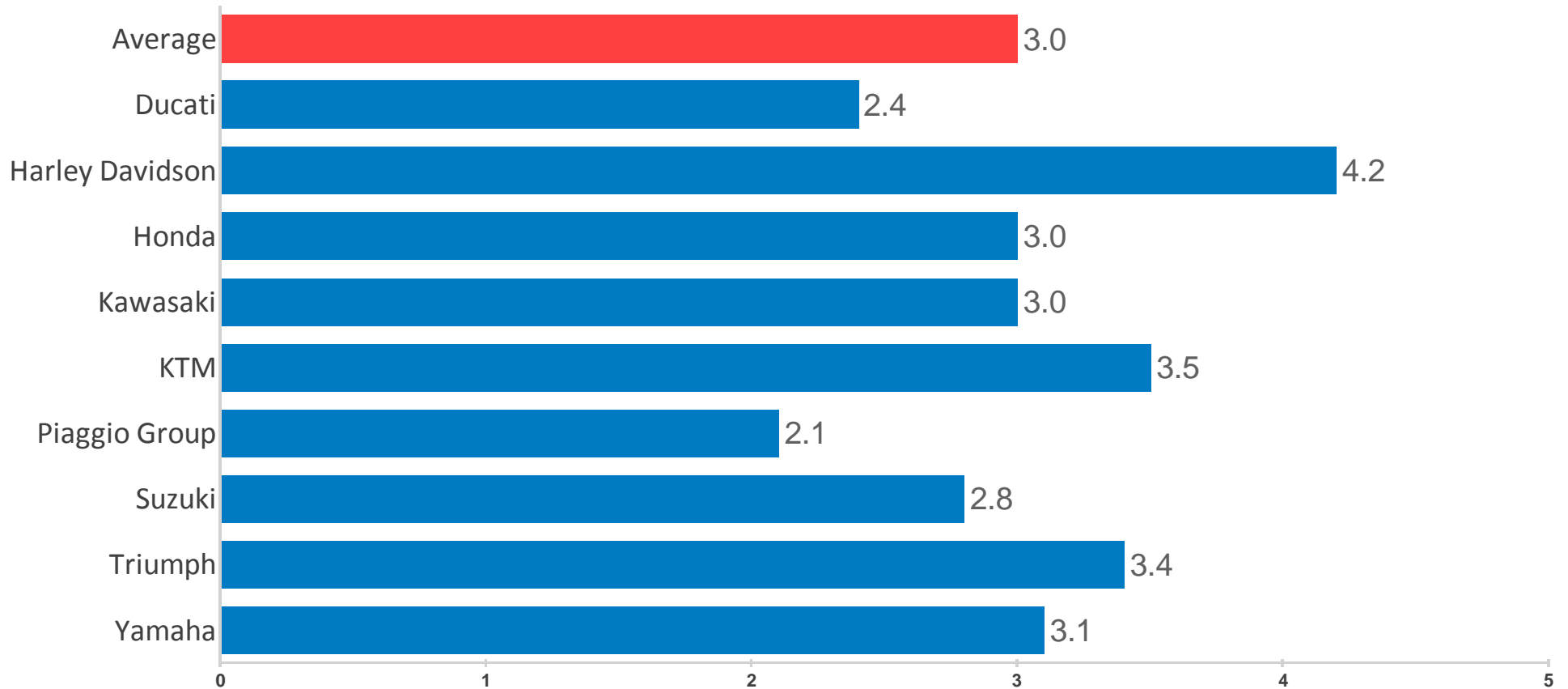


PREVIOUS SURVEY RESULTS – SPRING 2017

12e: Quality and availability of technical support			
Ducati	2.5	Triumph	2.9
Harley Davidson	3.2	Yamaha	3.6
Honda	3.4		
Kawasaki	4.3		
KTM	3.7		
Piaggio Group	2.6		
Suzuki	4.0	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

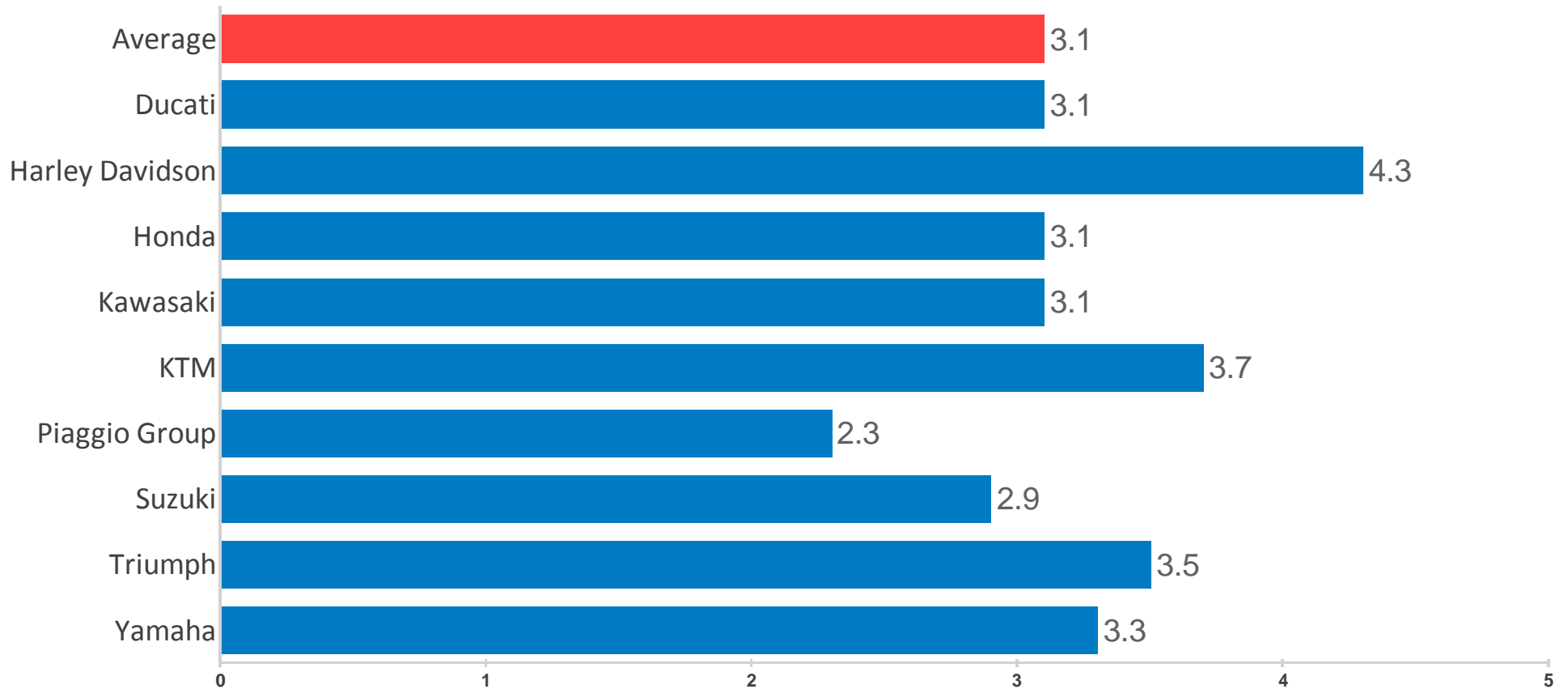


PREVIOUS SURVEY RESULTS – SPRING 2017

13: The profit return by representing your franchise			
Ducati	2.8	Triumph	3.8
Harley Davidson	3.7	Yamaha	3.3
Honda	3.2		
Kawasaki	3.3		
KTM	3.7		
Piaggio Group	2.3		
Suzuki	3.2	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q14 a) The future profitability of your business

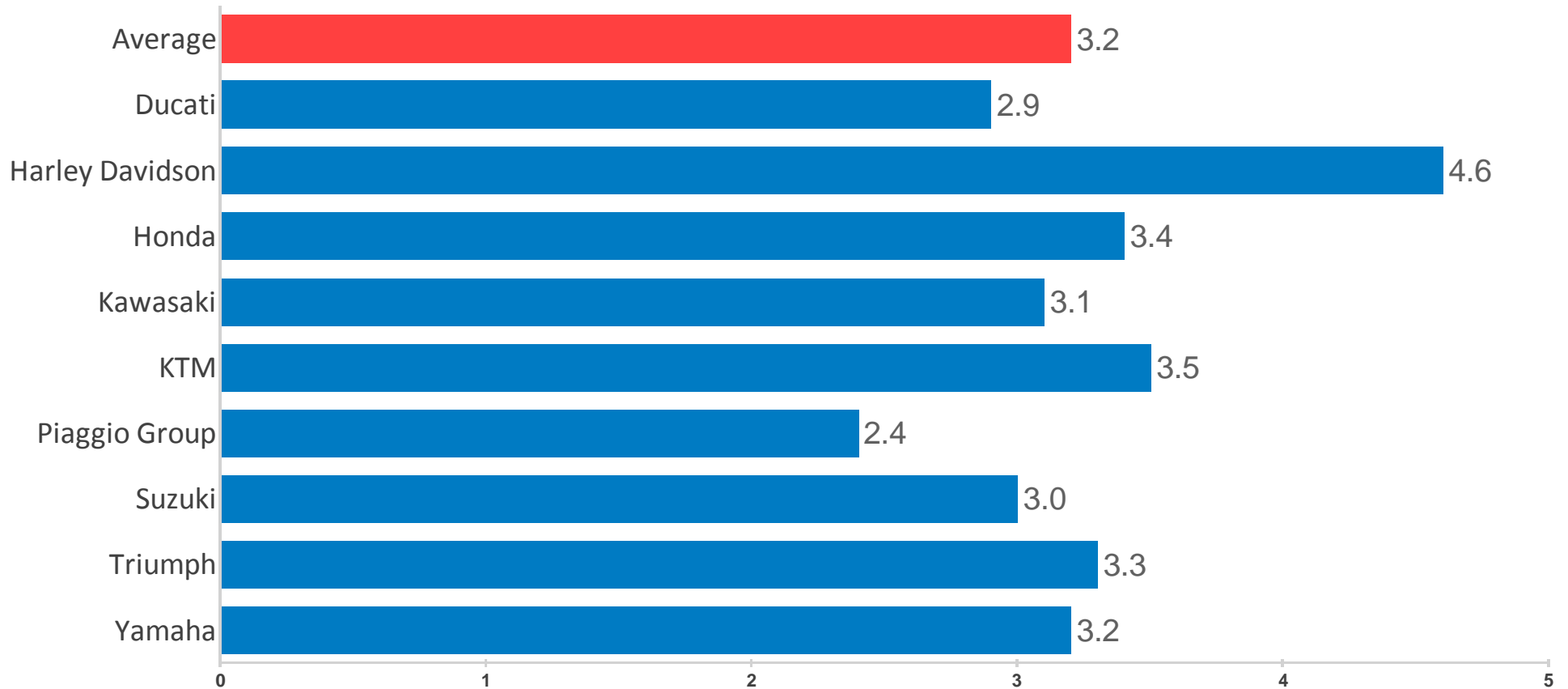


PREVIOUS SURVEY RESULTS – SPRING 2017

14a: The future profitability of your business			
Ducati	2.8	Triumph	3.8
Harley Davidson	4.0	Yamaha	3.5
Honda	3.6		
Kawasaki	3.5		
KTM	3.9		
Piaggio Group	2.6		
Suzuki	3.4	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q14 b) Your stocking plan for this franchise

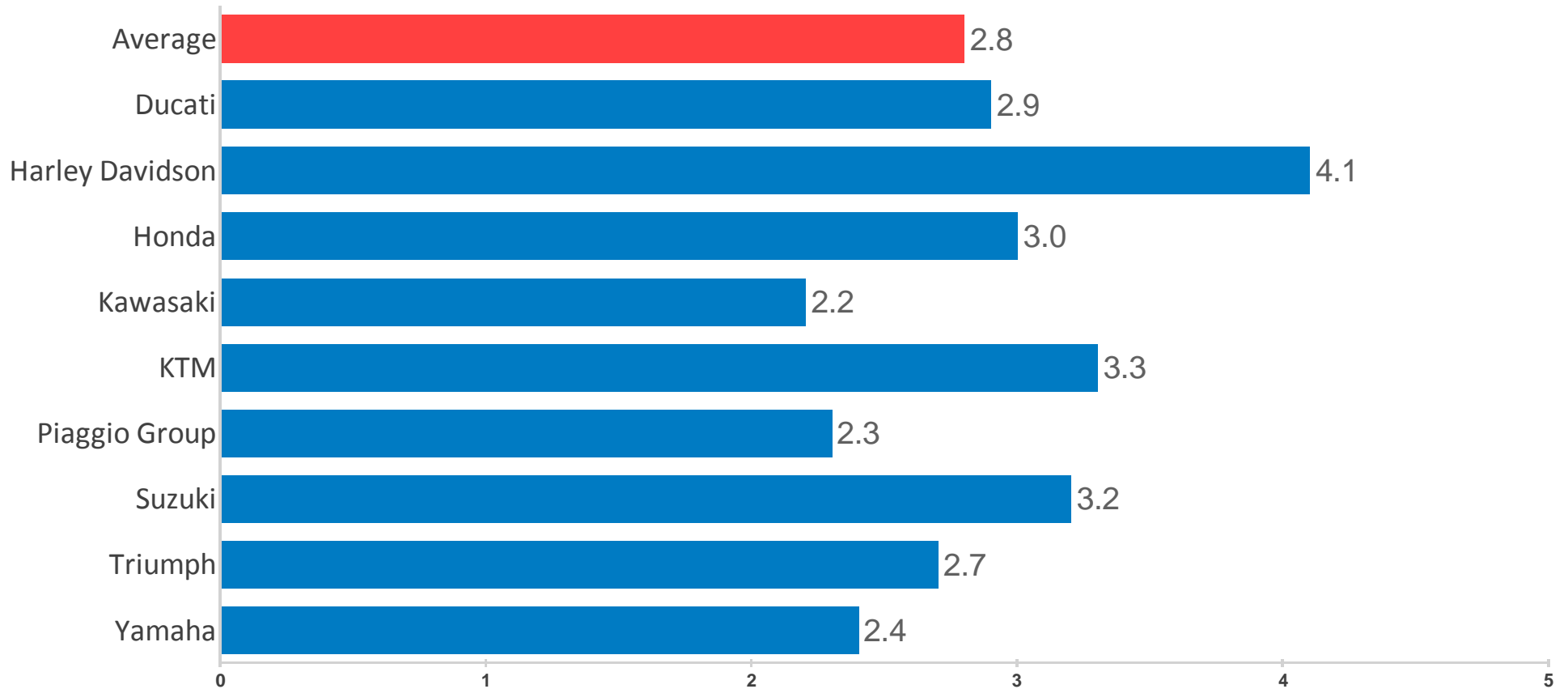


PREVIOUS SURVEY RESULTS – SPRING 2017

14b: Your stocking plan for this franchise			
Ducati	3.8	Triumph	3.4
Harley Davidson	4.2	Yamaha	3.1
Honda	3.5		
Kawasaki	3.6		
KTM	4.0		
Piaggio Group	2.7		
Suzuki	3.4	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q15 a) The dealer standards expected by your manufacturer

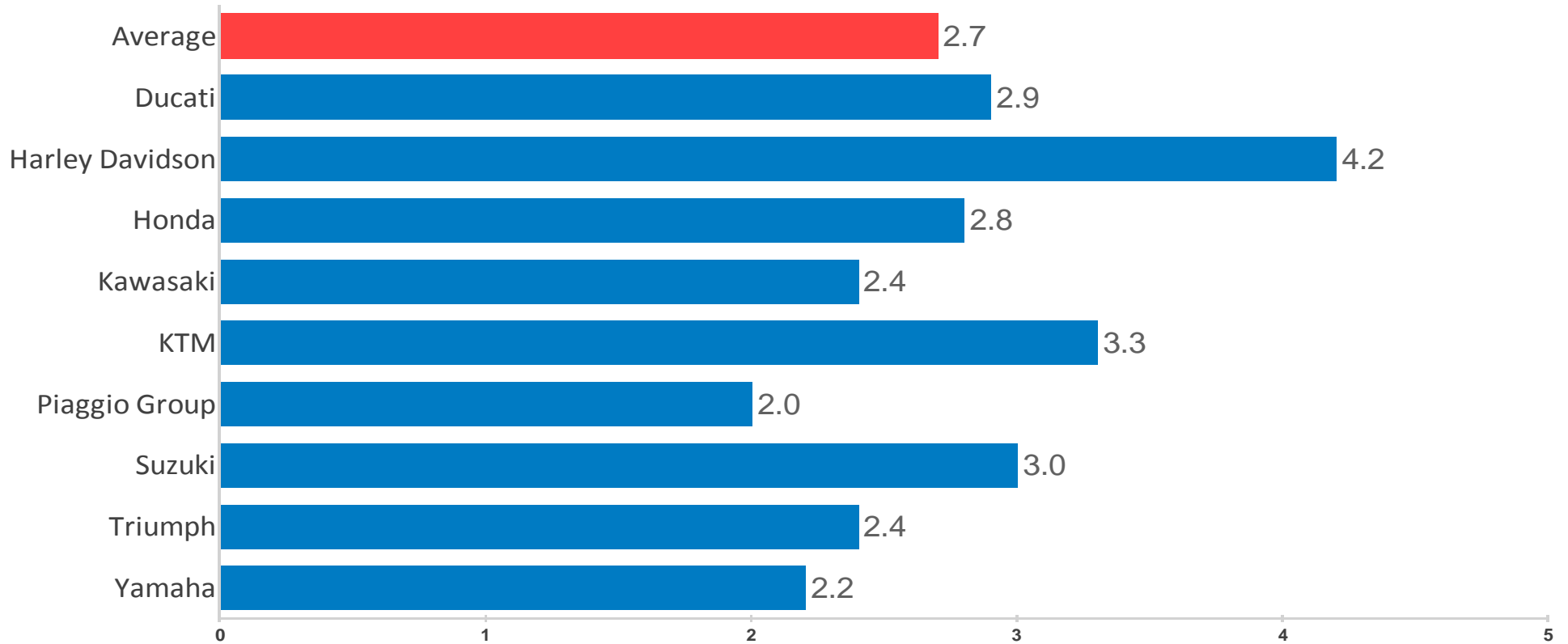


PREVIOUS SURVEY RESULTS – SPRING 2017

15a: The dealer standards expected by your manufacturer			
Ducati	2.8	Triumph	2.9
Harley Davidson	4.0	Yamaha	3.0
Honda	2.7		
Kawasaki	2.3		
KTM	3.4		
Piaggio Group	2.2		
Suzuki	3.5	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

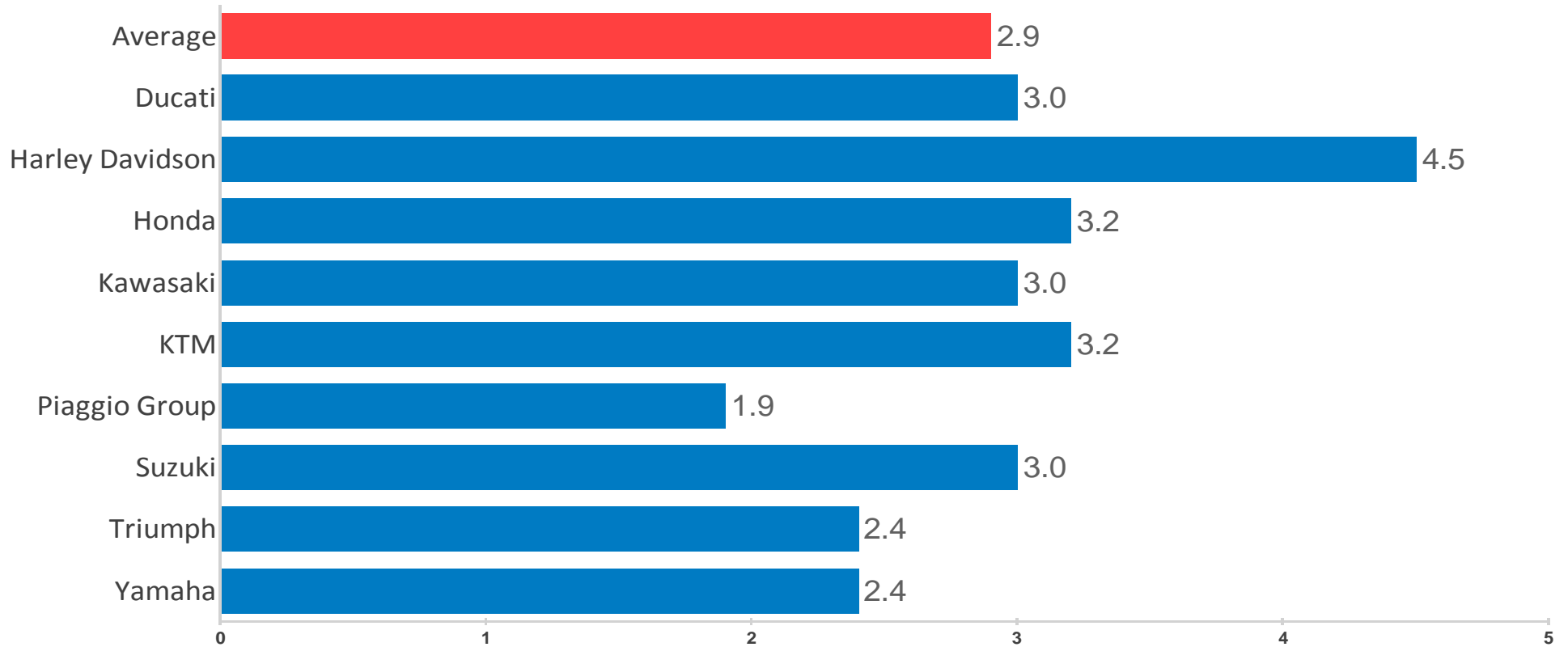


PREVIOUS SURVEY RESULTS – SPRING 2017

15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward			
Ducati	2.7	Triumph	2.8
Harley Davidson	4.0	Yamaha	2.9
Honda	2.7		
Kawasaki	2.4		
KTM	3.4		
Piaggio Group	2.1		
Suzuki	3.1	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

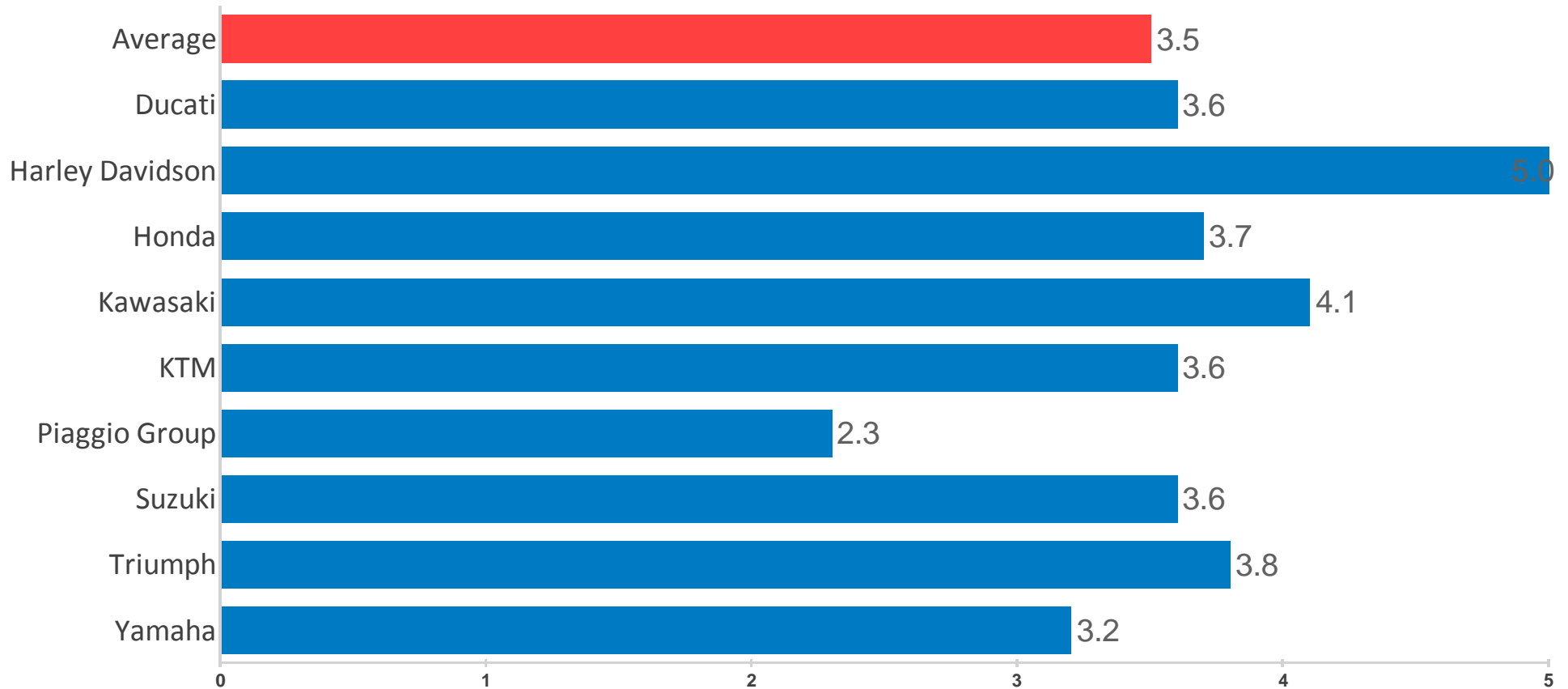


PREVIOUS SURVEY RESULTS – SPRING 2017

16a: That the management of your manufacturer takes dealers' views and opinions into account			
Ducati	2.0	Piaggio Group	2.9
Harley Davidson	4.0	Suzuki	3.0
Honda	3.2		
Kawasaki	3.4	Triumph	
KTM	3.4	Yamaha	
Piaggio Group	2.3		
Suzuki	3.3	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q16 b) The effectiveness of the field sales team

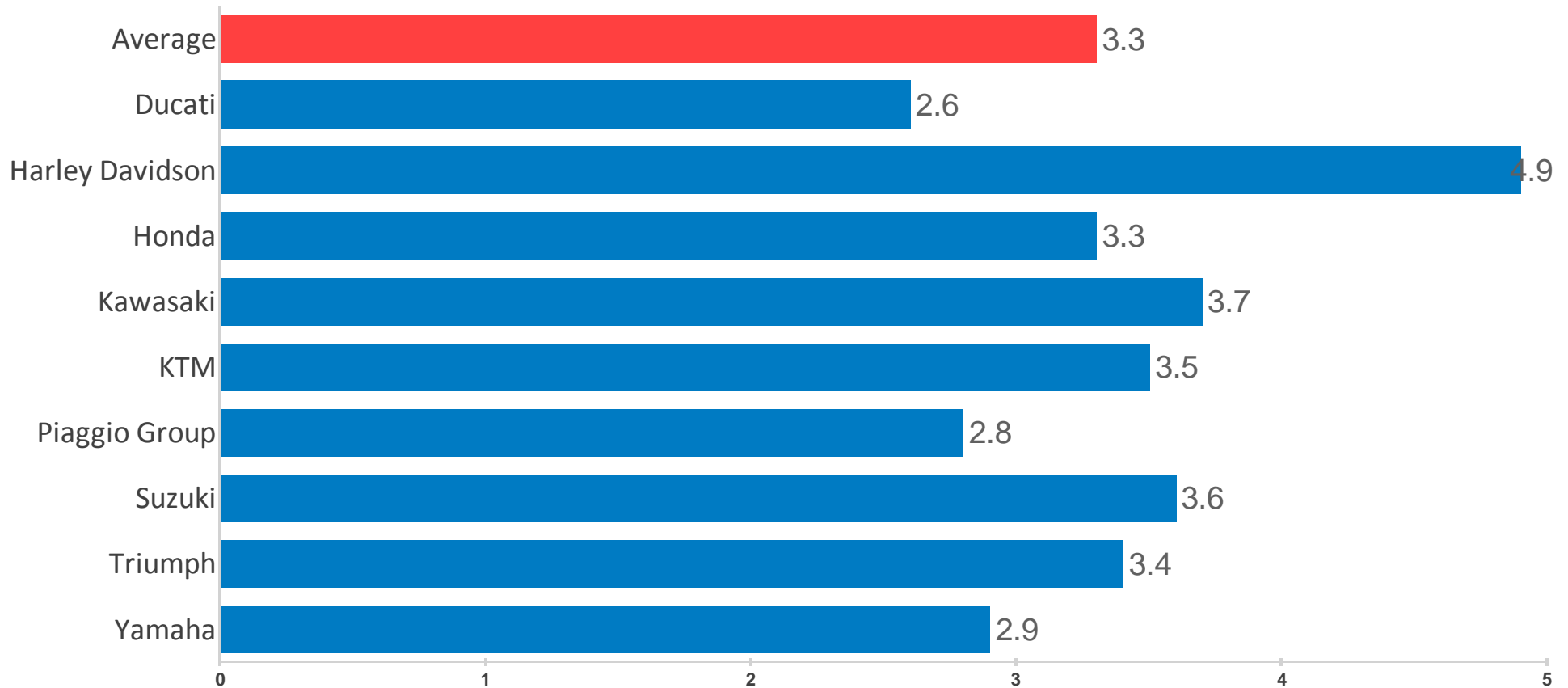


PREVIOUS SURVEY RESULTS – SPRING 2017

16b: The effectiveness of your field sales team			
Ducati	3.3	Triumph	3.7
Harley Davidson	4.3	Yamaha	3.6
Honda	3.5		
Kawasaki	3.8		
KTM	3.2		
Piaggio Group	3.0		
Suzuki	3.7	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

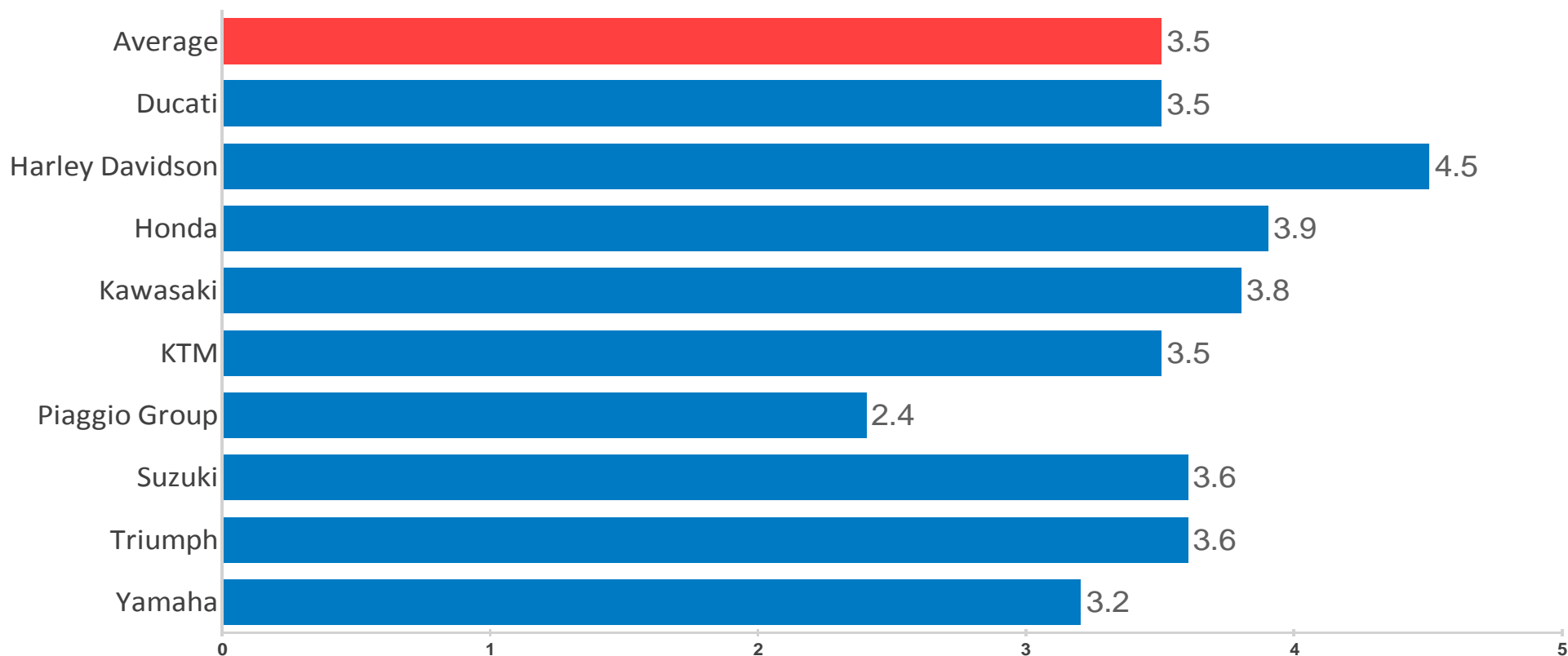


PREVIOUS SURVEY RESULTS – SPRING 2017

16c: The effectiveness of the field service and parts staff			
Ducati	2.5	Triumph	3.2
Harley Davidson	4.2	Yamaha	3.5
Honda	3.3		
Kawasaki	3.5		
KTM	3.3		
Piaggio Group	2.8		
Suzuki	3.9	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

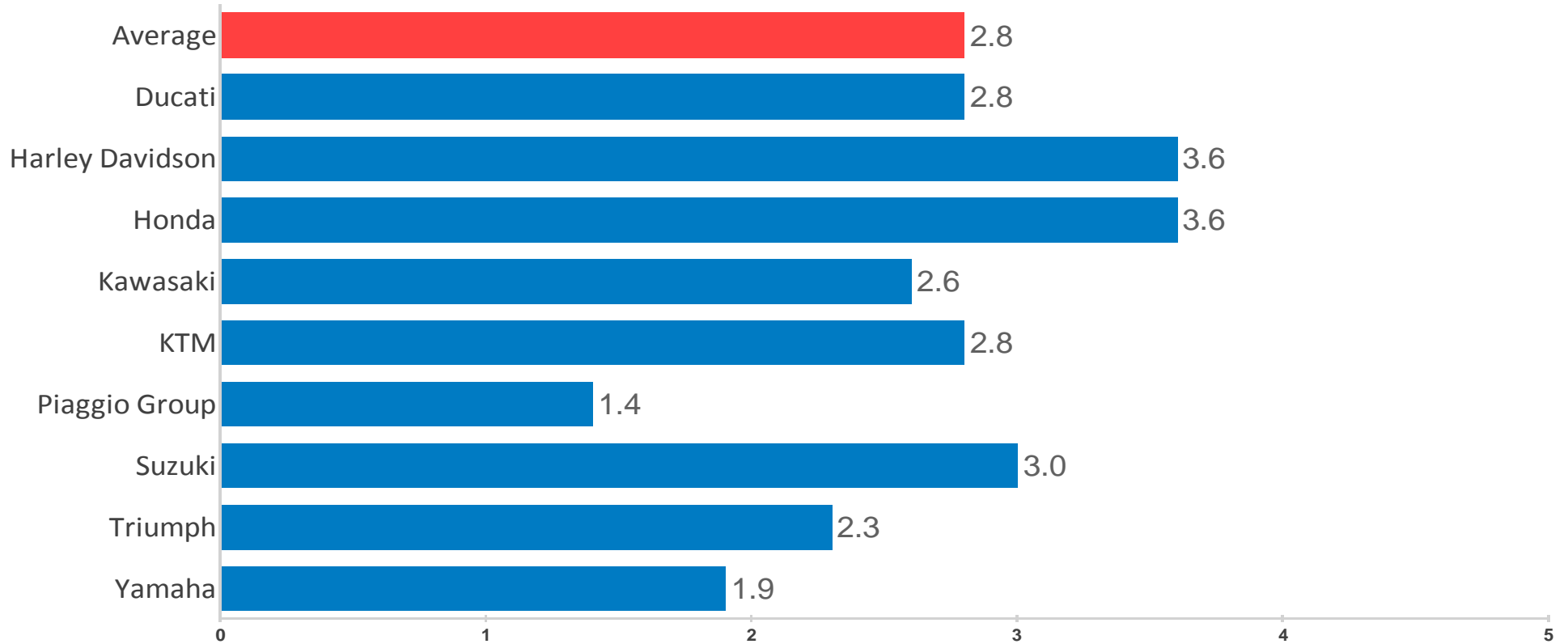


PREVIOUS SURVEY RESULTS – SPRING 2017

16d: The effectiveness of your manufacturer's retail finance programme			
Ducati	3.3	Triumph	3.6
Harley Davidson	4.0	Yamaha	3.6
Honda	3.7		
Kawasaki	4.1		
KTM	3.8		
Piaggio Group	2.5		
Suzuki	3.9	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

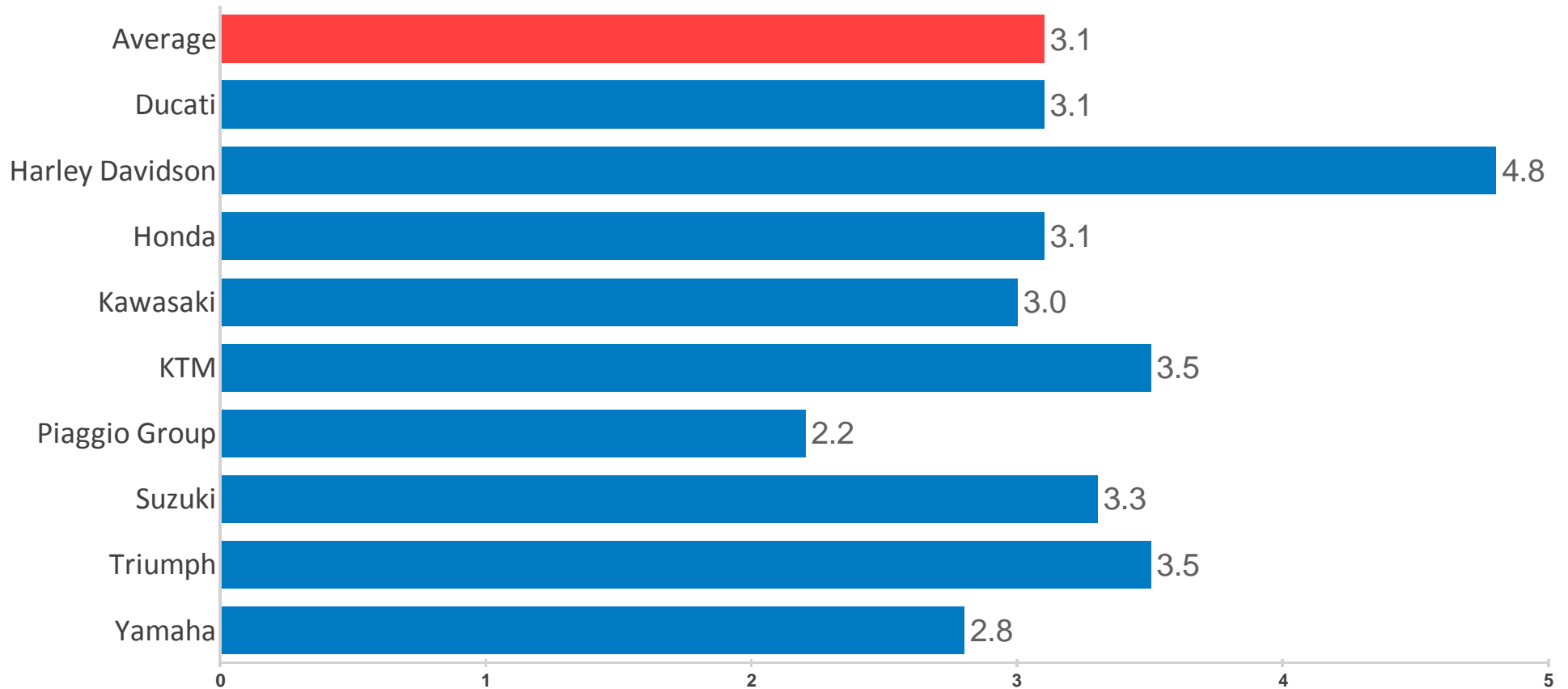


PREVIOUS SURVEY RESULTS – SPRING 2017

16e: The effectiveness of your dealer council and dealer forums			
Ducati	2.3	Triumph	2.1
Harley Davidson	3.2	Yamaha	2.7
Honda	3.5		
Kawasaki	2.7		
KTM	3.2		
Piaggio Group	2.1		
Suzuki	3.4	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q17 a) The routine procedures and controls expected

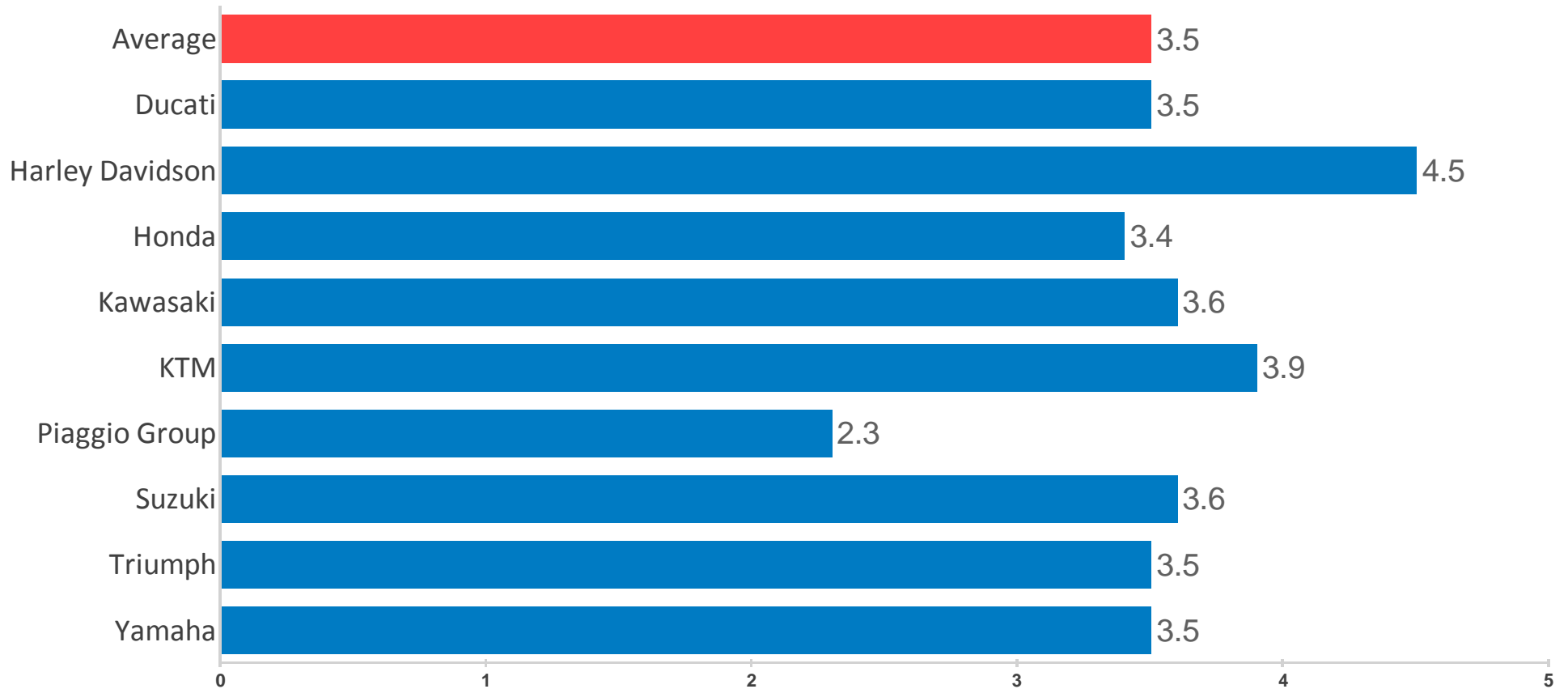


PREVIOUS SURVEY RESULTS – SPRING 2017

17a: The routine procedures and controls expected			
Ducati	2.5	Triumph	3.1
Harley Davidson	4.3	Yamaha	3.3
Honda	2.9		
Kawasaki	2.9		
KTM	3.9		
Piaggio Group	2.4		
Suzuki	3.8	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q17 b) The quality of your manufacturer's training

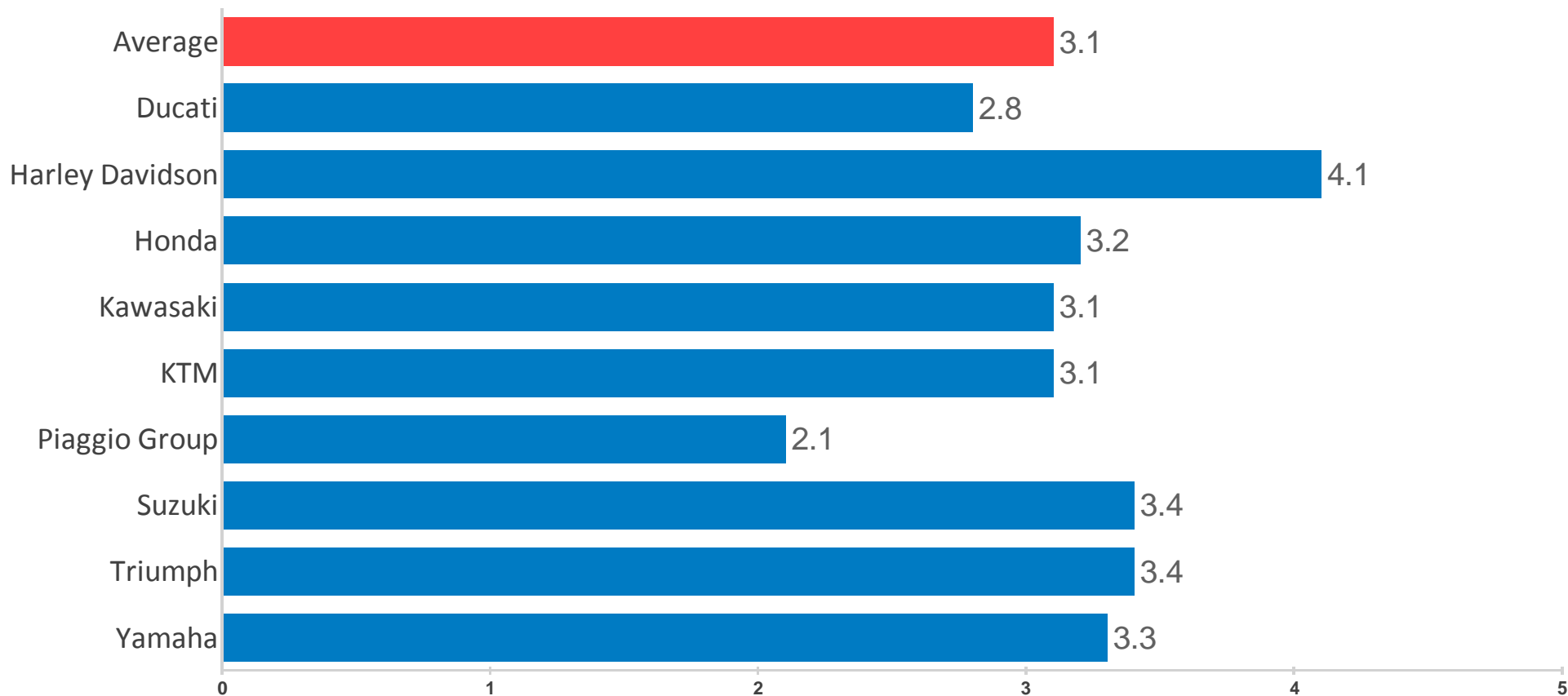


PREVIOUS SURVEY RESULTS – SPRING 2017

17b: The quality of your manufacturer's training			
Ducati	3.8	Triumph	3.4
Harley Davidson	4.2	Yamaha	3.8
Honda	3.1		
Kawasaki	3.6		
KTM	4.2		
Piaggio Group	2.7		
Suzuki	4.0	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

Q17 c) The cost of your manufacturer's training

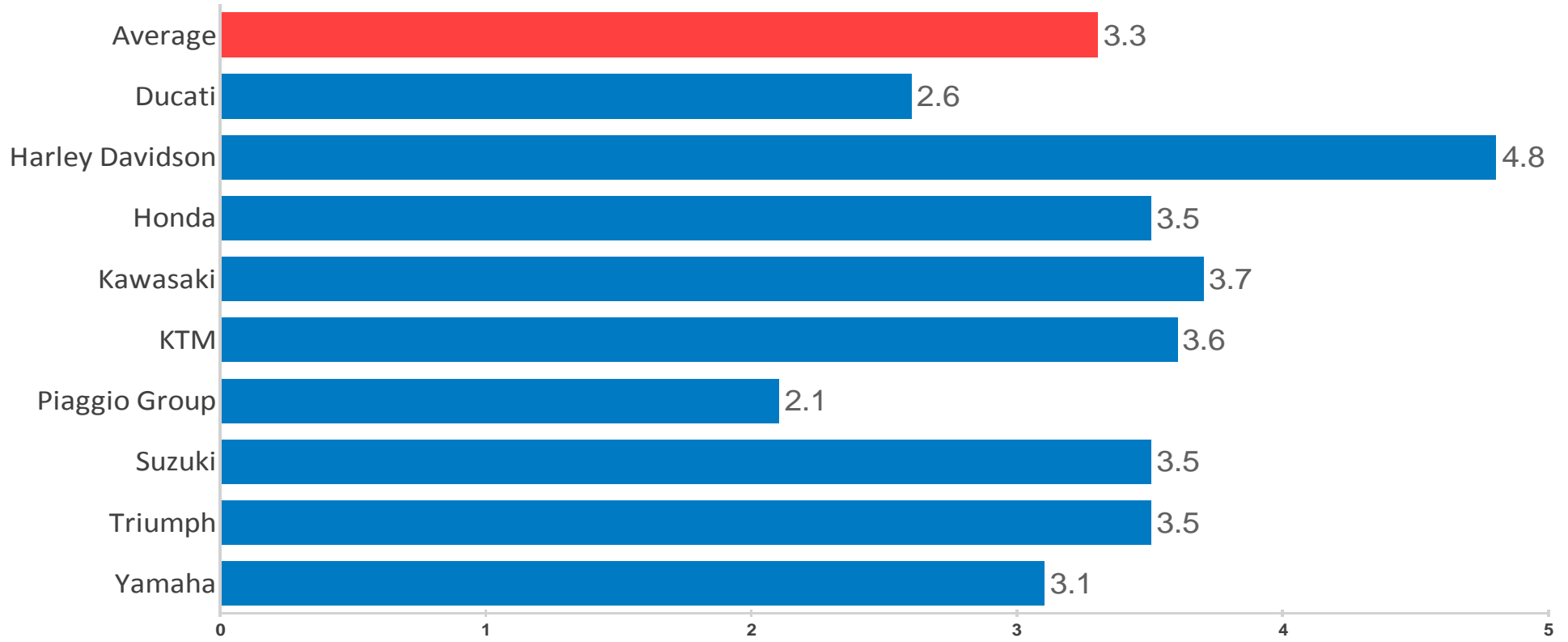


PREVIOUS SURVEY RESULTS – SPRING 2017

17c: The cost of your manufacturer's training			
Ducati	2.7	Triumph	3.4
Harley Davidson	3.6	Yamaha	3.6
Honda	3.1		
Kawasaki	3.1		
KTM	3.2		
Piaggio Group	2.4		
Suzuki	3.8	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

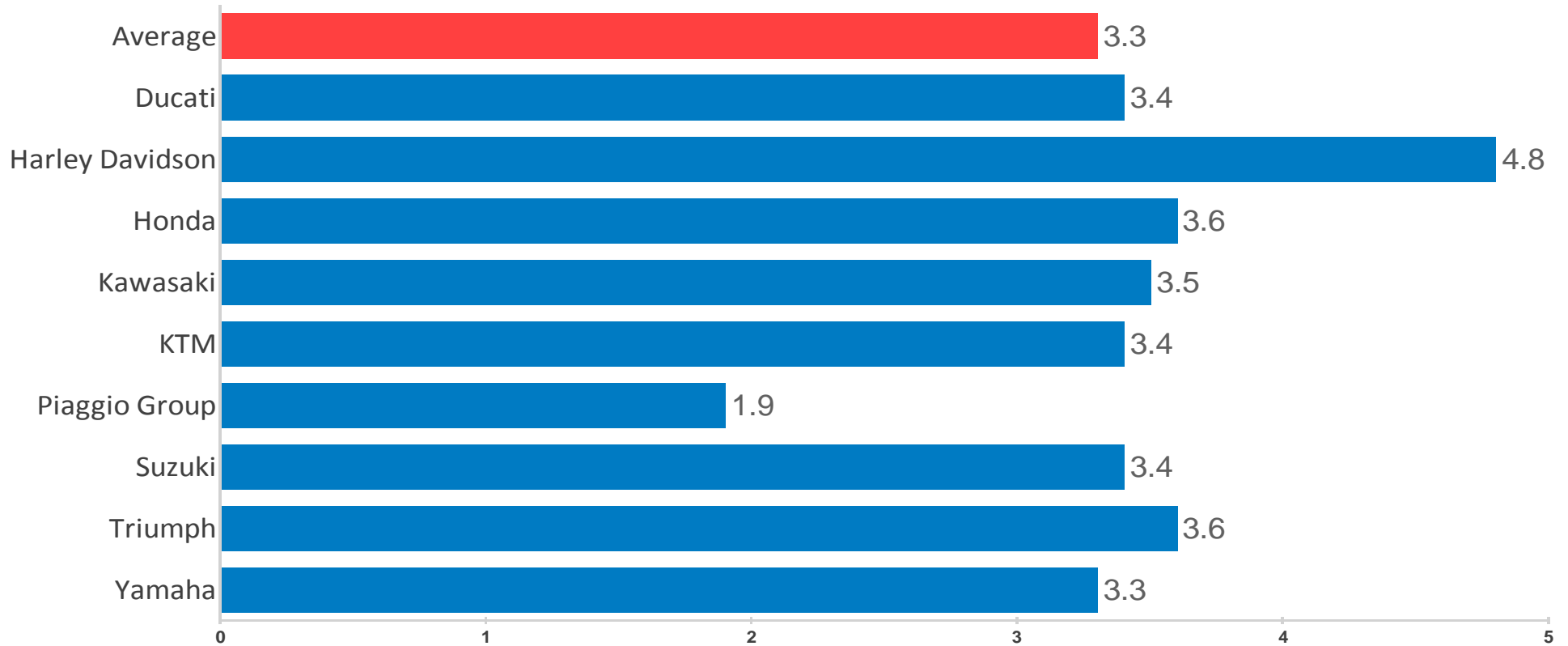


PREVIOUS SURVEY RESULTS – SPRING 2017

17d: Your ability to do business with your manufacturer on a day-to-day basis			
Ducati	2.7	Triumph	4.2
Harley Davidson	4.1	Yamaha	3.6
Honda	3.2		
Kawasaki	3.6		
KTM	3.4		
Piaggio Group	2.3		
Suzuki	3.9	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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

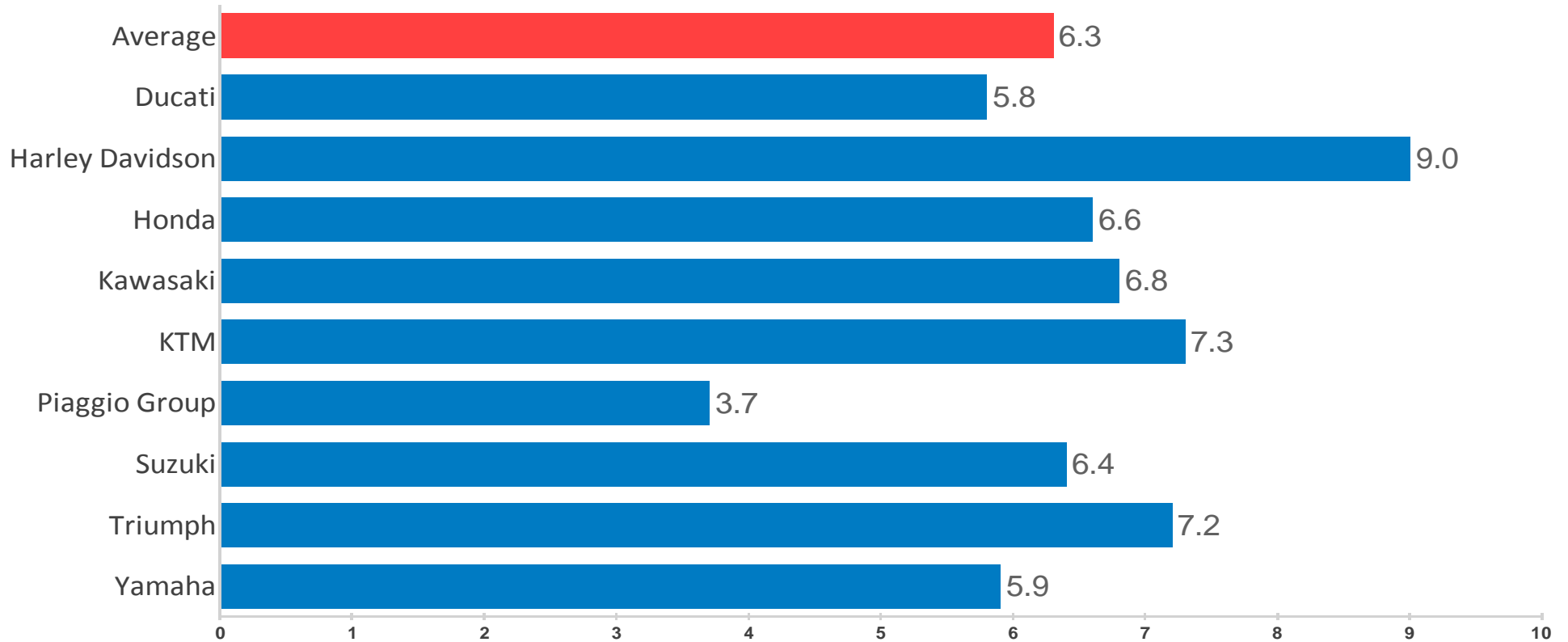


PREVIOUS SURVEY RESULTS – SPRING 2017

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process			
Ducati	3.5	Triumph	3.5
Harley Davidson	4.0	Yamaha	3.4
Honda	3.7		
Kawasaki	3.5		
KTM	3.7		
Piaggio Group	2.5		
Suzuki	3.9	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

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



PREVIOUS SURVEY RESULTS – SPRING 2017

18: Overall, how do you rate the value of holding your motorcycle franchise			
Ducati	6.2	Triumph	8.2
Harley Davidson	9.2	Yamaha	7.4
Honda	6.8		
Kawasaki	7.0		
KTM	8.1		
Piaggio Group	4.0		
Suzuki	7.1	AVERAGE	6.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 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	4.0	Ducati	3.3		Harley Davidson	4.1	Triumph	2.6
Honda	3.8	Piaggio Group	2.0		KTM	3.3	Piaggio Group	2.5
KTM	3.8				Suzuki	3.2		
Triumph	3.8				Ducati	3.0		
Kawasaki	3.6				Kawasaki	2.9		
Suzuki	3.6				Yamaha	2.8		
Yamaha	3.4	Average	3.5		Honda	2.7	Average	2.9

7a: Your manufacturer’s policy for the supply and stocking of motorcycles					7b: The new motorcycle target negotiating process			
Harley Davidson	4.3	Yamaha	2.8		Harley Davidson	4.0	Triumph	2.2
Honda	3.5	Piaggio Group	2.1		Suzuki	3.3	Piaggio Group	2.0
Kawasaki	3.3				Ducati	3.1		
KTM	2.1				KTM	3.1		
Suzuki	3.0				Kawasaki	2.8		
Triumph	2.9				Yamaha	2.7		
Ducati	2.8	Average	3.1		Honda	2.5	Average	2.7

7c: What is your annual target for this brand					8a: The brand image			
Honda	274.8	Kawasaki	115.4		Harley Davidson	4.8	Suzuki	3.7
Harley Davidson	237.1	Suzuki	81.2		Triumph	4.5	Piaggio Group	2.6
KTM	213.6				Ducati	4.4		
Triumph	190.4				KTM	4.4		
Yamaha	152.4				Honda	4.1		
Piaggio Group	141.4				Kawasaki	4.1		
Ducati	129.0	Average	176.1		Yamaha	3.9	Average	4.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

8b: The product image				8c: Frequency of introduction of new models			
Harley Davidson	4.8	Suzuki	3.6	Harley Davidson	4.5	Suzuki	3.1
KTM	4.4	Piaggio Group	2.8	Triumph	4.2	Piaggio Group	2.1
Ducati	4.3			Ducati	4.1		
Triumph	4.3			Kawasaki	4.0		
Kawasaki	4.2			Honda	3.9		
Honda	4.1			KTM	3.9		
Yamaha	4.0	Average	4.0	Yamaha	3.9	Average	3.7

8d: Retail sales incentives and promotions				8e: Product advertising			
Harley Davidson	4.3	Yamaha	3.1	Harley Davidson	4.0	Yamaha	3.2
Honda	3.8	Piaggio Group	2.1	KTM	3.9	Piaggio Group	1.5
Triumph	3.8			Triumph	3.9		
Suzuki	3.6			Ducati	3.5		
KTM	3.5			Honda	3.5		
Kawasaki	3.4			Suzuki	3.4		
Ducati	3.3	Average	3.4	Kawasaki	3.3	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	4.8	Honda	2.7	Harley Davidson	4.9	Honda	2.5
KTM	4.3	Piaggio Group	2.5	KTM	4.2	Piaggio Group	1.7
Triumph	4.3			Triumph	3.6		
Harley Davidson	3.8			Yamaha	3.3		
Yamaha	3.7			Ducati	3.2		
Suzuki	3.5			Suzuki	3.1		
Kawasaki	3.0	Average	3.4	Kawasaki	2.6	Average	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

9: Your manufacturer's warranty policy				10: What is your labour rate for retail before VAT (£)			
Harley Davidson	4.2	Piaggio Group	3.1	Harley Davidson	75.1	Kawasaki	52.1
Honda	3.8	Ducati	2.3	Ducati	70.1		
Kawasaki	3.7			Triumph	60.7		
Suzuki	3.7			Piaggio Group	58.0		
KTM	3.6			Honda	56.8		
Yamaha	3.5			KTM	55.2		
Triumph	3.4	Average	3.5	Yamaha	54.4	Average	57.2

11: What is your labour rate for warranty before VAT (£)				12a: Warranty labour rate			
Harley Davidson	75.1	Yamaha	37.1	Harley Davidson	5.0	Ducati	2.3
Ducati	51.6	Suzuki	36.9	Triumph	3.6	Yamaha	2.3
Triumph	50.4			Kawasaki	3.5		
Kawasaki	48.3			Honda	3.2		
Honda	46.0			KTM	3.0		
KTM	40.6			Piaggio Group	3.0		
Piaggio Group	40.2	Average	44.9	Yamaha	3.0	Average	3.1

12b: Warranty replacement parts policy				12c: Warranty time allowances			
Harley Davidson	4.1	Piaggio Group	2.1	Harley Davidson	4.4	Ducati	2.8
Suzuki	2.9	Ducati	1.7	Yamaha	4.0	Piaggio Group	2.4
Kawasaki	2.8			Kawasaki	3.8		
Triumph	2.6			Triumph	3.8		
Honda	2.5			Honda	3.5		
KTM	2.5			KTM	3.5		
Yamaha	2.5	Average	2.6	Suzuki	3.5	Average	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

12d: Timely and fair settlement of warranty claims					12e: Quality and availability of technical support			
Harley Davidson	4.9	Ducati	2.9		Harley Davidson	3.8	Ducati	2.3
Kawasaki	3.9	Piaggio Group	2.6		Kawasaki	3.7	Piaggio Group	2.3
Yamaha	3.9				KTM	3.7		
Suzuki	3.8				Suzuki	3.6		
Triumph	3.8				Honda	3.4		
Honda	3.7				Yamaha	3.3		
KTM	3.6	Average	3.6		Triumph	3.2	Average	3.3

13: The profit return by representing your franchise					14a: The future profitability of your business			
Harley Davidson	4.2	Ducati	2.4		Harley Davidson	4.3	Suzuki	2.9
KTM	3.5	Piaggio Group	2.1		KTM	3.7	Piaggio Group	2.3
Triumph	3.4				Triumph	3.5		
Yamaha	3.1				Yamaha	3.3		
Honda	3.0				Ducati	3.1		
Kawasaki	3.0				Honda	3.1		
Suzuki	2.8	Average	3.0		Kawasaki	3.1	Average	3.1

14b: Your stocking plan for this franchise					15a: The dealer standards expected by your manufacturer			
Harley Davidson	4.6	Ducati	2.9		Harley Davidson	4.1	Piaggio Group	2.3
KTM	3.5	Piaggio Group	2.4		KTM	3.3	Kawasaki	2.2
Honda	3.4				Suzuki	3.2		
Triumph	3.3				Honda	3.0		
Yamaha	3.2				Ducati	2.9		
Kawasaki	3.1				Triumph	2.7		
Suzuki	3.0	Average	3.2		Yamaha	2.4	Average	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 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	4.2	Yamaha	2.2		Harley Davidson	4.5	Yamaha	2.4
KTM	3.3	Piaggio Group	2.0		Honda	3.2	Piaggio Group	1.9
Suzuki	3.0				KTM	3.2		
Ducati	2.9				Ducati	3.0		
Honda	2.8				Kawasaki	3.0		
Kawasaki	2.4				Suzuki	3.0		
Triumph	2.4	Average	2.7		Triumph	2.4	Average	2.9

16b: The effectiveness of your field sales team					16c: The effectiveness of the field service and parts staff			
Harley Davidson	5.0	Yamaha	3.2		Harley Davidson	4.9	Piaggio Group	2.8
Kawasaki	4.1	Piaggio Group	2.3		Kawasaki	3.7	Ducati	2.6
Triumph	3.8				Suzuki	3.6		
Honda	3.7				KTM	3.5		
Ducati	3.6				Triumph	3.4		
KTM	3.6				Honda	3.3		
Suzuki	3.6	Average	3.5		Yamaha	2.9	Average	3.3

16d: The effectiveness of your manufacturer's retail finance programme					16e: The effectiveness of your dealer council and dealer forums			
Harley Davidson	4.5	Yamaha	3.2		Harley Davidson	3.6	Yamaha	1.9
Honda	3.9	Piaggio Group	2.4		Honda	3.6	Piaggio Group	1.4
Kawasaki	3.8				Suzuki	3.0		
Suzuki	3.6				Ducati	2.8		
Triumph	3.6				KTM	2.8		
Ducati	3.5				Kawasaki	2.6		
KTM	3.5	Average	3.5		Triumph	2.3	Average	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2017 SURVEY

17a: The routine procedures and controls expected					17b: The quality of your manufacturer's training			
Harley Davidson	4.8	Yamaha	2.8		Harley Davidson	4.5	Honda	3.4
KTM	3.5	Piaggio Group	2.2		KTM	3.9	Piaggio Group	2.3
Triumph	3.5				Kawasaki	3.6		
Suzuki	3.3				Suzuki	3.6		
Ducati	3.1				Ducati	3.5		
Honda	3.1				Triumph	3.5		
Kawasaki	3.0	Average	3.1		Yamaha	3.5	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			
Harley Davidson	4.1	Ducati	2.8		Harley Davidson	4.8	Ducati	2.6
Suzuki	3.4	Piaggio Group	2.1		Kawasaki	3.7	Piaggio Group	2.1
Triumph	3.4				KTM	3.6		
Yamaha	3.3				Honda	3.5		
Honda	3.2				Suzuki	3.5		
Kawasaki	3.1				Triumph	3.5		
KTM	3.1	Average	3.1		Yamaha	3.1	Average	3.3

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	4.8	Yamaha	3.3		Harley Davidson	9.0	Ducati	5.8
Honda	3.6	Piaggio Group	1.9		KTM	7.3	Piaggio Group	3.7
Triumph	3.6				Triumph	7.2		
Kawasaki	3.5				Kawasaki	6.8		
Ducati	3.4				Honda	6.6		
KTM	3.4				Suzuki	6.4		
Suzuki	3.4	Average	3.3		Yamaha	5.9	Average	6.3