



NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY RESULTS

AUTUMN 2019

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY AUTUMN 2019

We are pleased to reveal the findings of the latest Motorcycle Dealer Attitude Survey conducted in October 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 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 numerical rankings for this survey are featured at the back of this report.

NB:

National Motorcycle Dealers Association

November 2019

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NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY



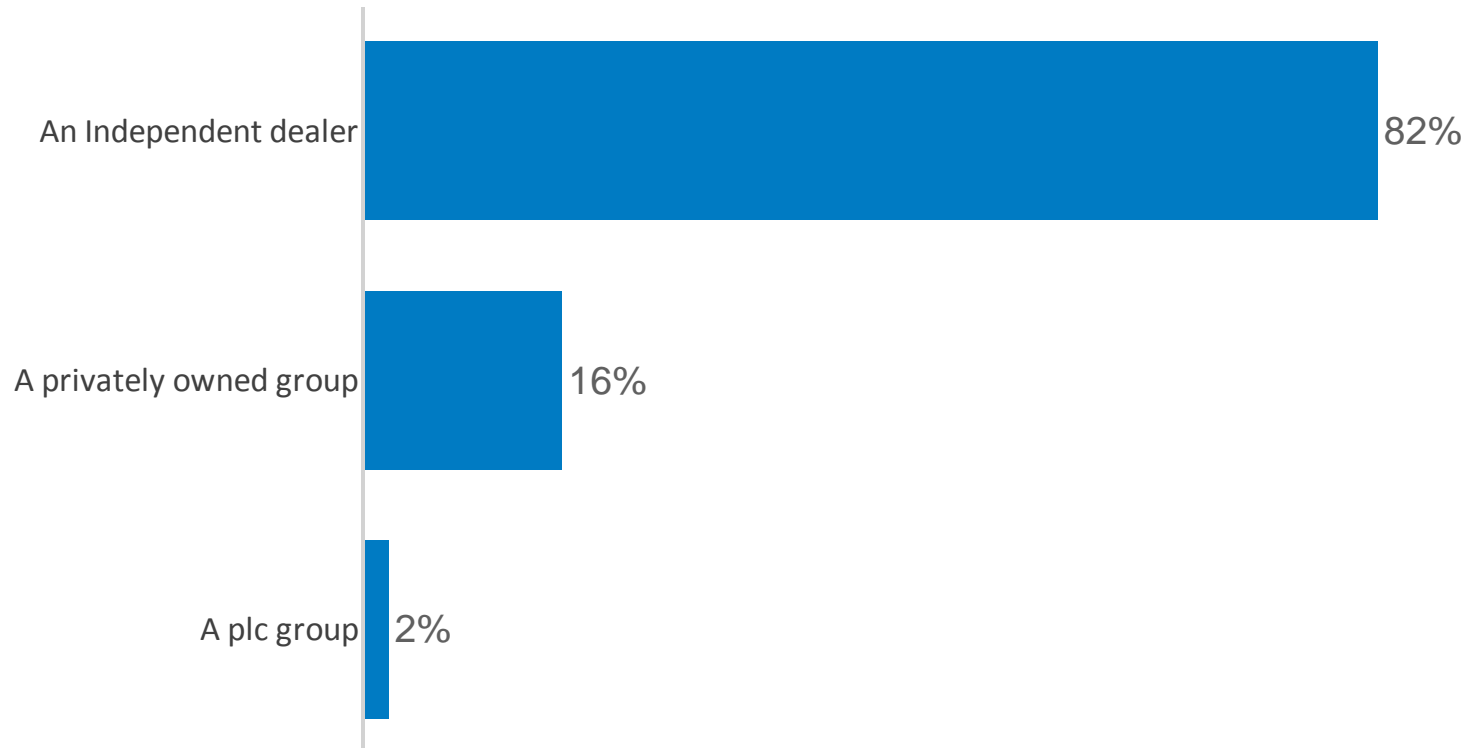
NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

BREAKDOWN OF RESPONSES

FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
DUCATI	5	30	17
HARLEY DAVIDSON	8	30	27
HONDA	21	128	16
KAWASAKI	15	90	17
KTM	2	31	6
PIAGGIO GROUP	11	57	19
SUZUKI	18	93	19
TRIUMPH	8	48	17
YAMAHA	20	107	19
TOTAL	108	614	18

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q2 In this site are you:

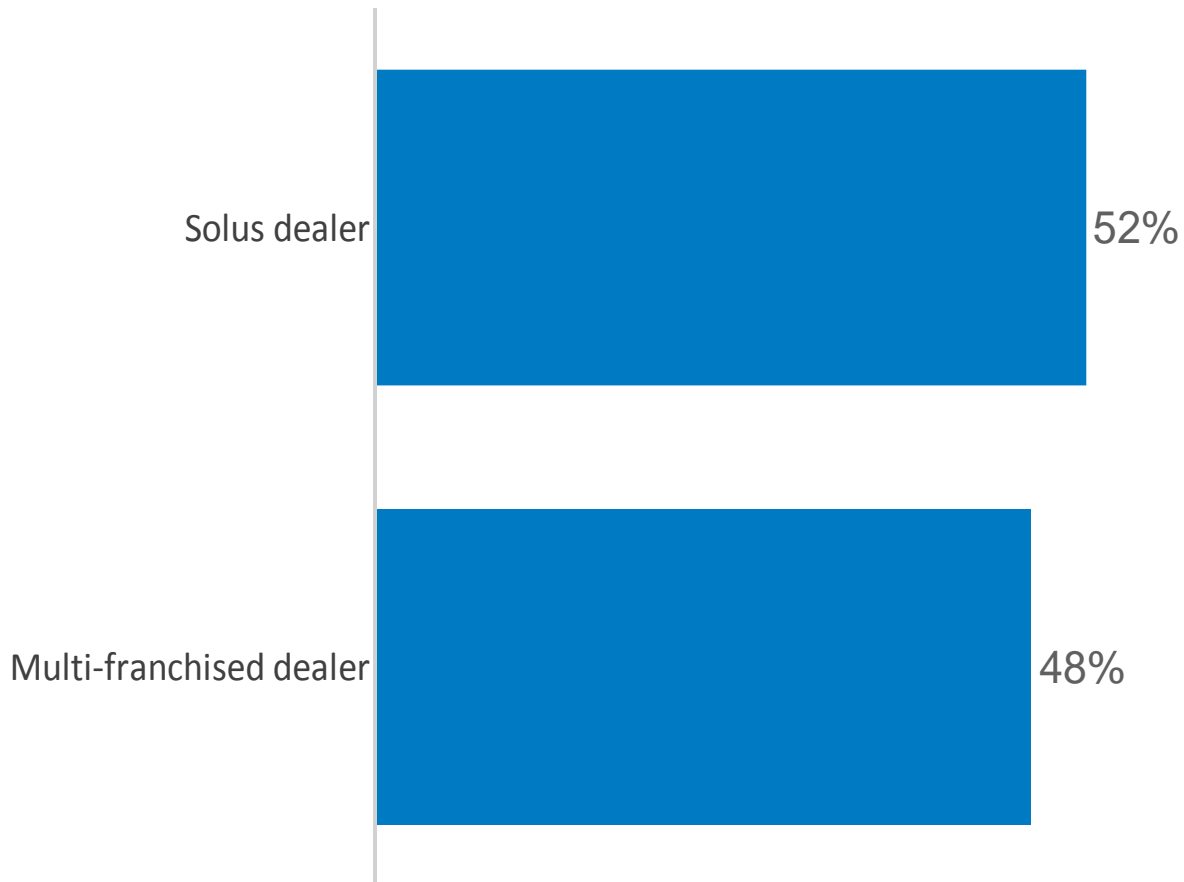


SPRING 2019 SURVEY RESULTS

INDEPENDENT	75%
PRIVATELY OWNED	23%
PLC GROUP	1%

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

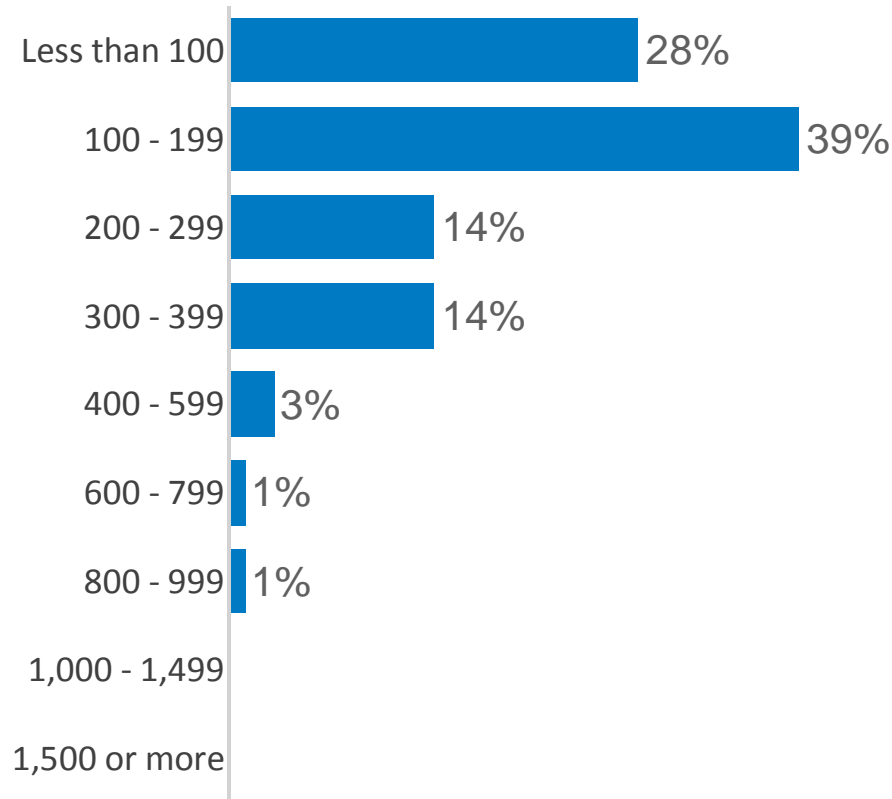
Q3 Is this site:



SPRING 2019 SURVEY RESULTS	
SOLUS	67%
MULTI-FRANCHISED	33%

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

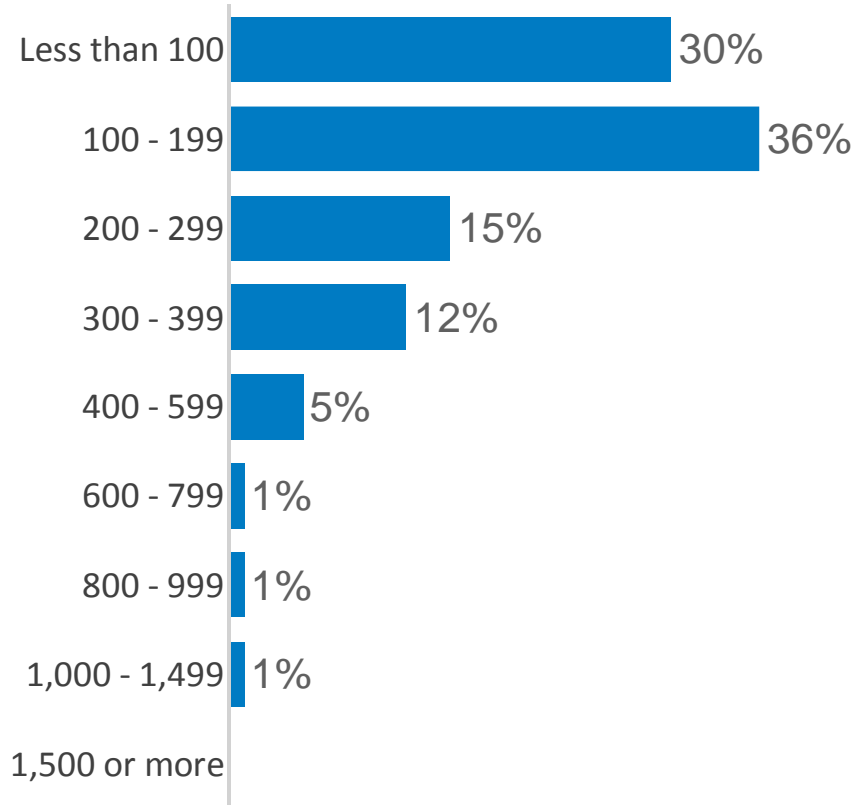
Q4 How many new motorcycles do you sell per annum?



SPRING 2019 SURVEY RESULTS			
Less than 100	26%	400 – 599	13%
100 – 199	25%	600 – 799	2%
200 – 299	31%	800 – 999	0%
300 – 399	4%	1000 – 1499	0%
1500 or more	0%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

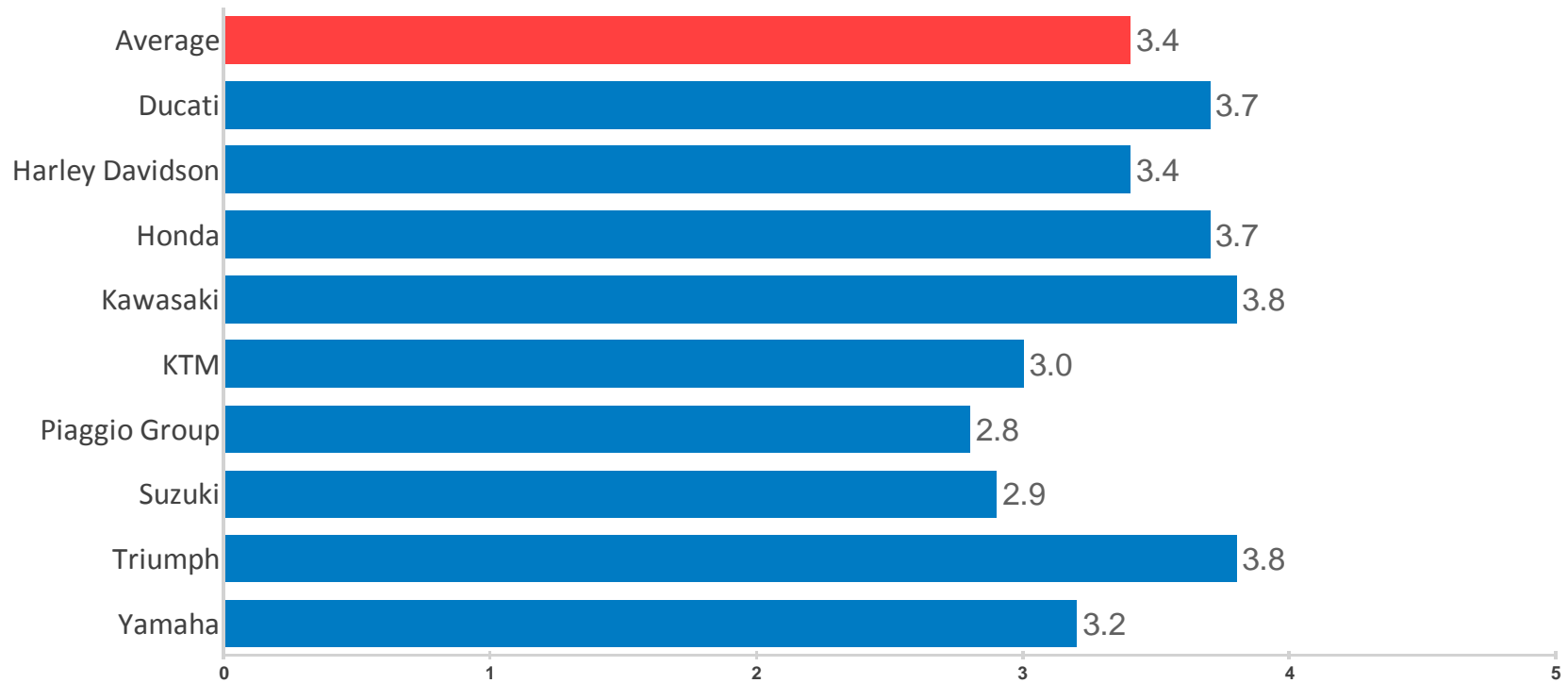
Q5 How many used motorcycles do you sell per annum?



SPRING 2019 SURVEY RESULTS			
Less than 100	20%	400 – 599	6%
100 – 199	37%	600 – 799	0%
200 – 299	26%	800 – 999	0%
300 – 399	11%	1000 – 1499	0%
1500 or more	0%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

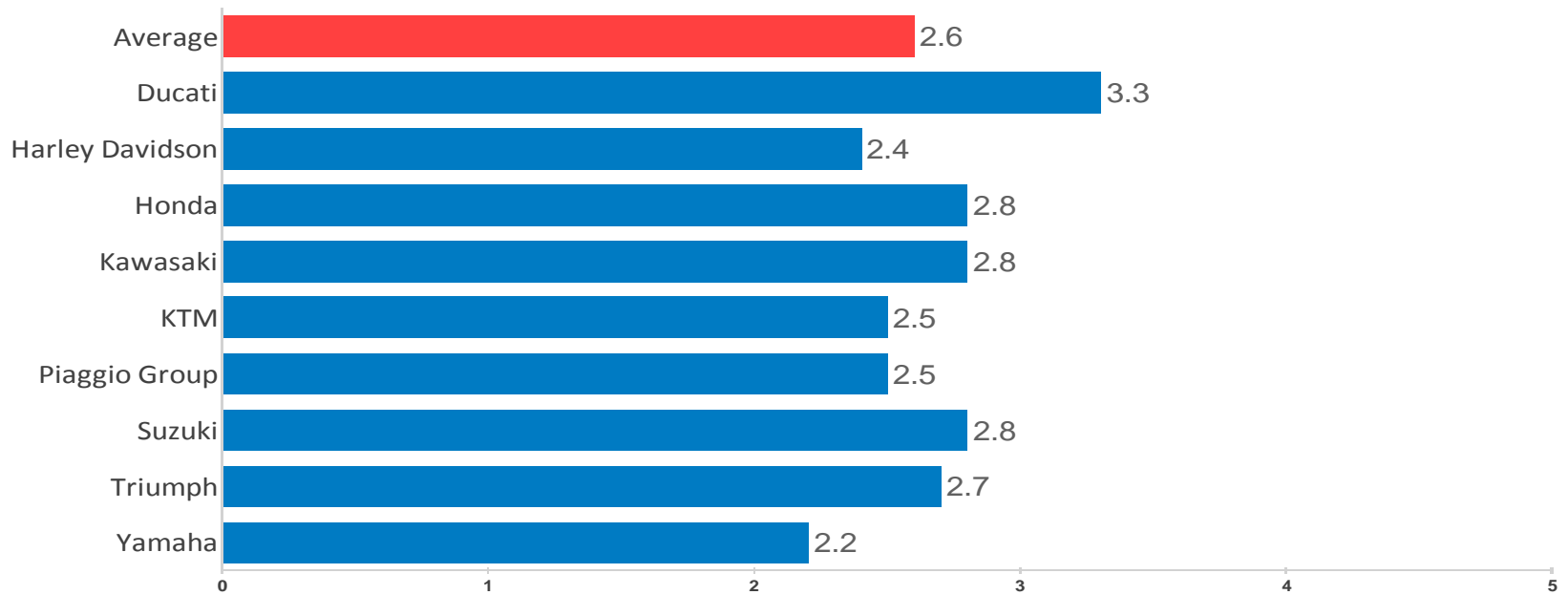


PREVIOUS SURVEY RESULTS – SPRING 2019

6a: The product's price and value against other brands			
Ducati	4.5	Triumph	3.6
Harley Davidson	3.6	Yamaha	3.4
Honda	3.7	BMW	3.4
Kawasaki	3.3		
KTM	3.0		
Piaggio Group	2.5		
Suzuki	3.3	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

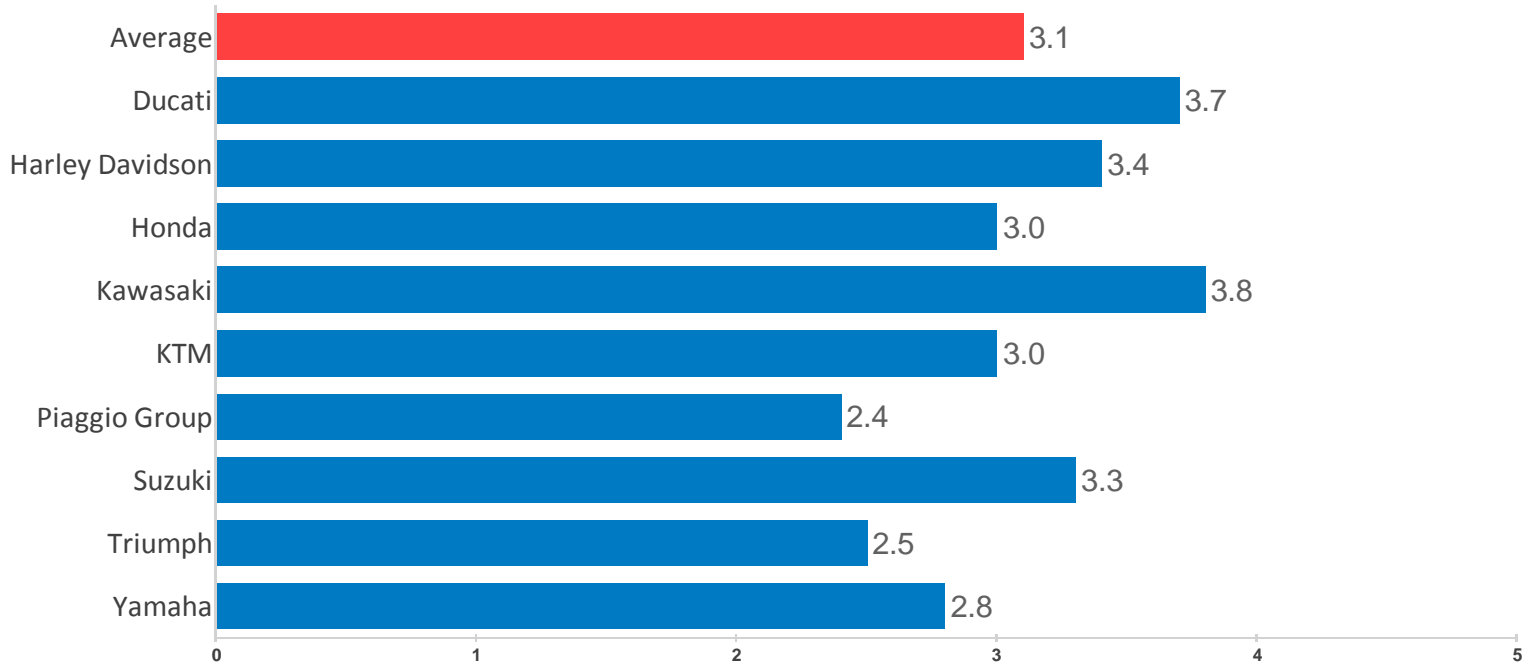


PREVIOUS SURVEY RESULTS – SPRING 2019

6b: How realistic is your target and performance related bonus in terms of achievement			
Ducati	4.5	Triumph	3.3
Harley Davidson	2.4	Yamaha	2.7
Honda	3.1	BMW	2.3
Kawasaki	2.1		
KTM	3.0		
Piaggio Group	2.5		
Suzuki	2.9	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

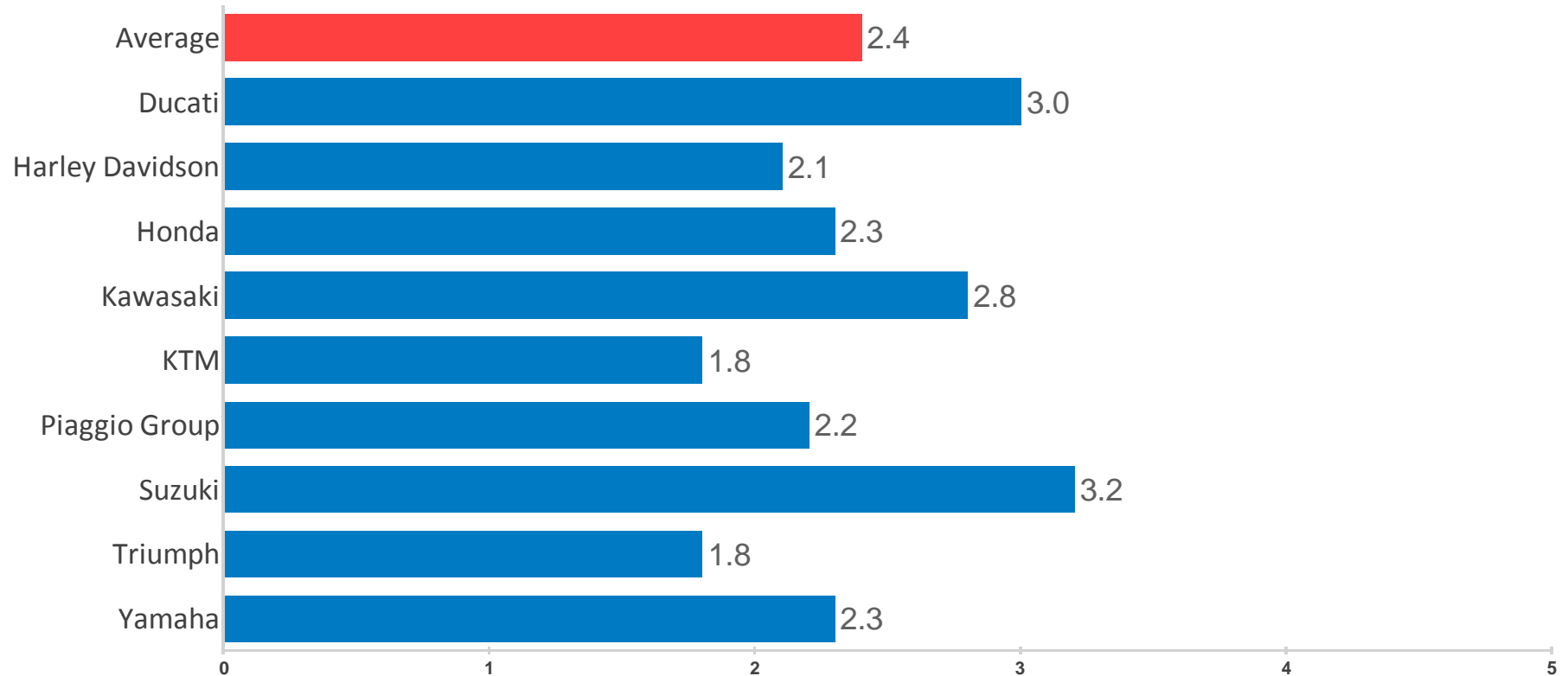


PREVIOUS SURVEY RESULTS – SPRING 2019

7a: The fairness of your manufacturer's policy for the supply and stocking of motorcycles			
BMW	3.4	Suzuki	3.3
Ducati	4.0	Triumph	2.3
Harley Davidson	3.1	Yamaha	3.1
Honda	3.7		
Kawasaki	3.2		
KTM	3.0		
Piaggio	1.9	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q7 b) The new motorcycle target negotiating process

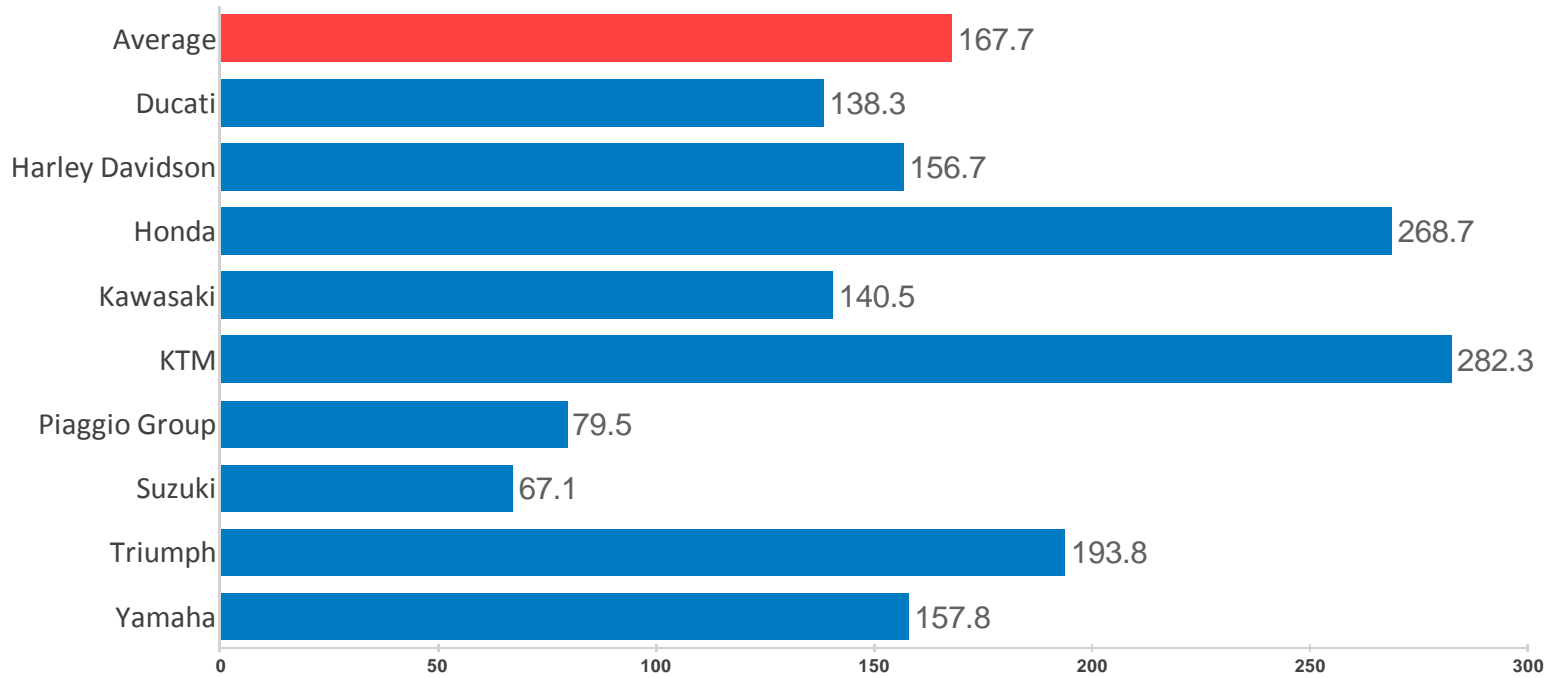


PREVIOUS SURVEY RESULTS – SPRING 2019

7b: Your new motorcycle target negotiating process			
Ducati	3.5	Triumph	2.6
Harley Davidson	2.6	Yamaha	2.7
Honda	2.6	BMW	2.8
Kawasaki	2.0		
KTM	2.3		
Piaggio Group	1.9		
Suzuki	3.4	AVERAGE	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q7c) What is your annual target for this brand?

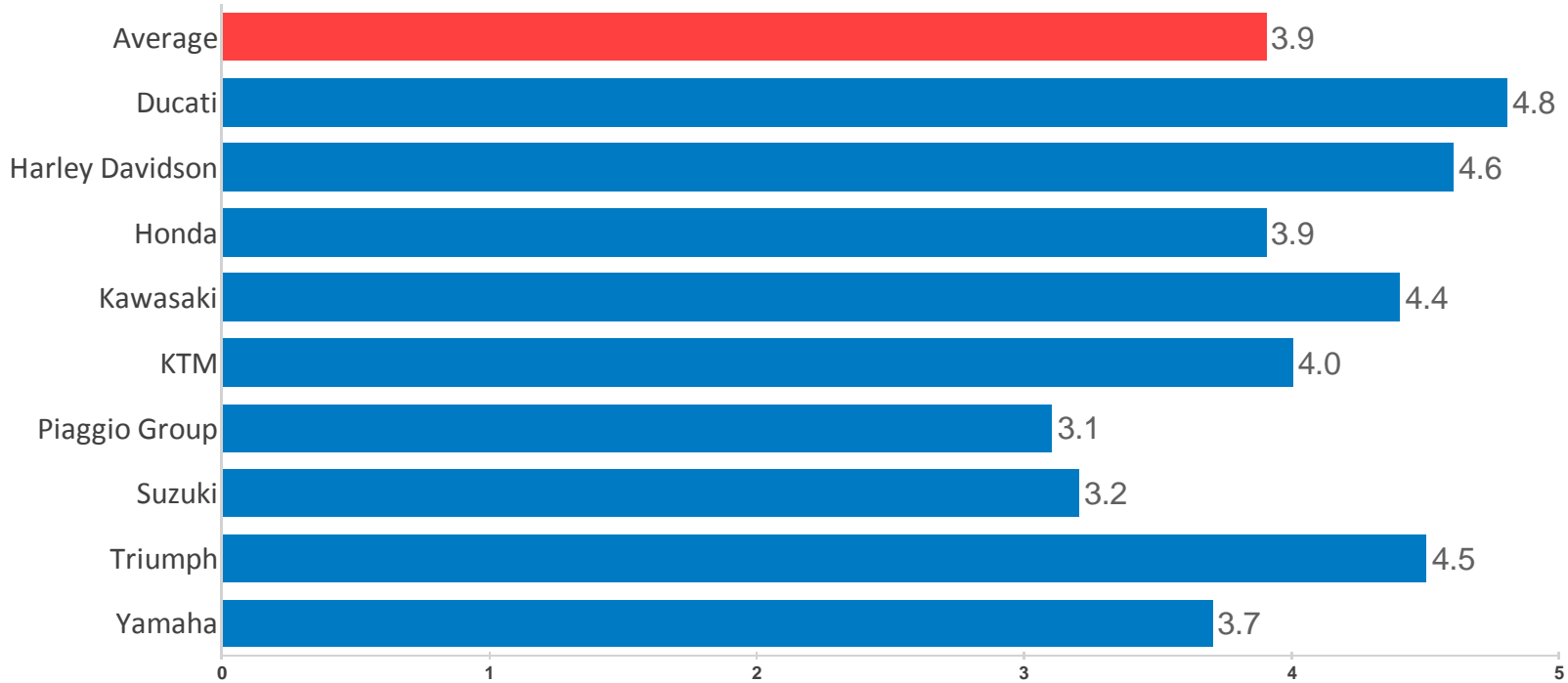


PREVIOUS SURVEY RESULTS – SPRING 2019

7c: What is your annual target for this brand			
BMW	377.0	Triumph	229.9
Harley Davidson	259.8	Yamaha	153.2
Honda	243.9	Ducati	90.0
Kawasaki	151.9		
KTM	260.0		
Piaggio Group	93.0		
Suzuki	81.3	AVERAGE	187.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q8 a) The brand image

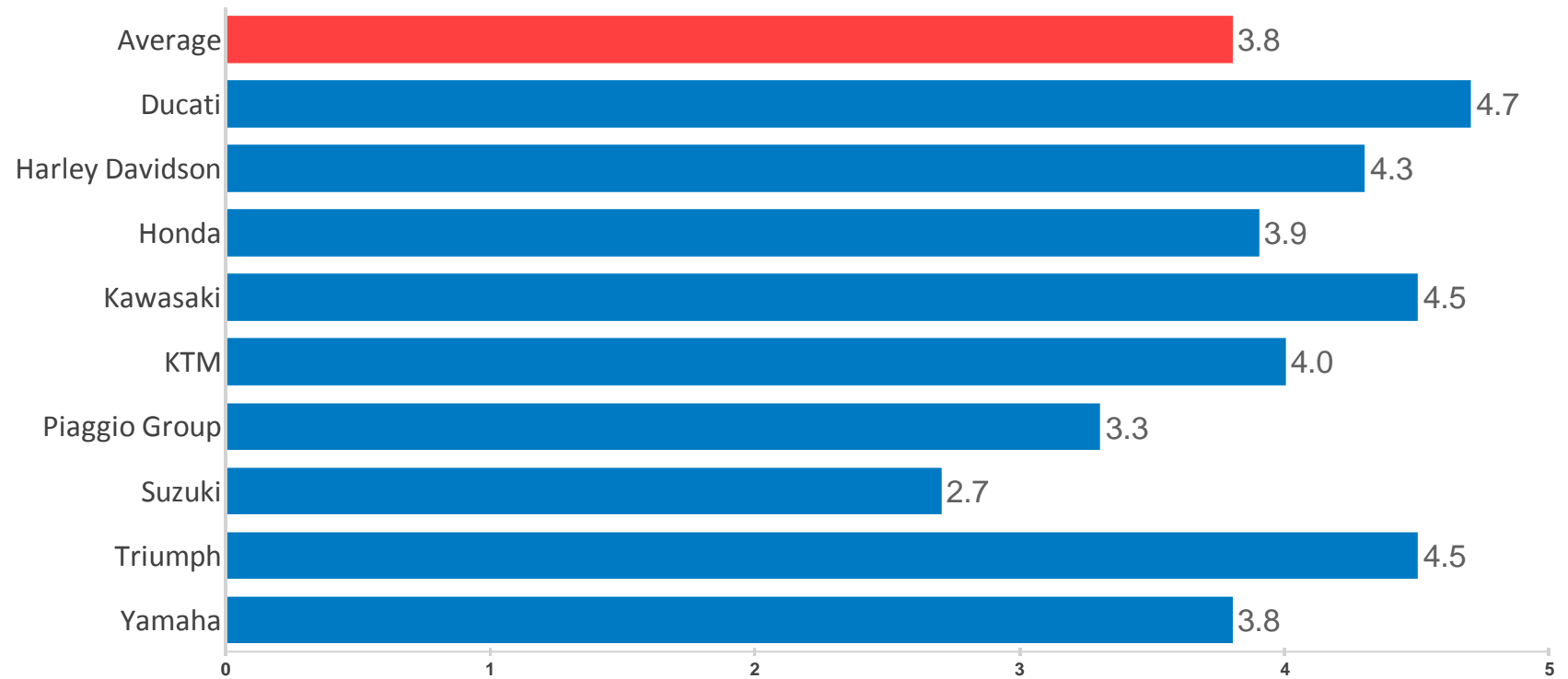


PREVIOUS SURVEY RESULTS – SPRING 2019

8a: The brand image			
BMW	4.4	Suzuki	3.8
Ducati	5.0	Triumph	4.6
Harley Davidson	4.4	Yamaha	3.8
Honda	4.2		
Kawasaki	4.0		
KTM	4.3		
Piaggio Group	2.1	AVERAGE	3.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q8 b) The product image

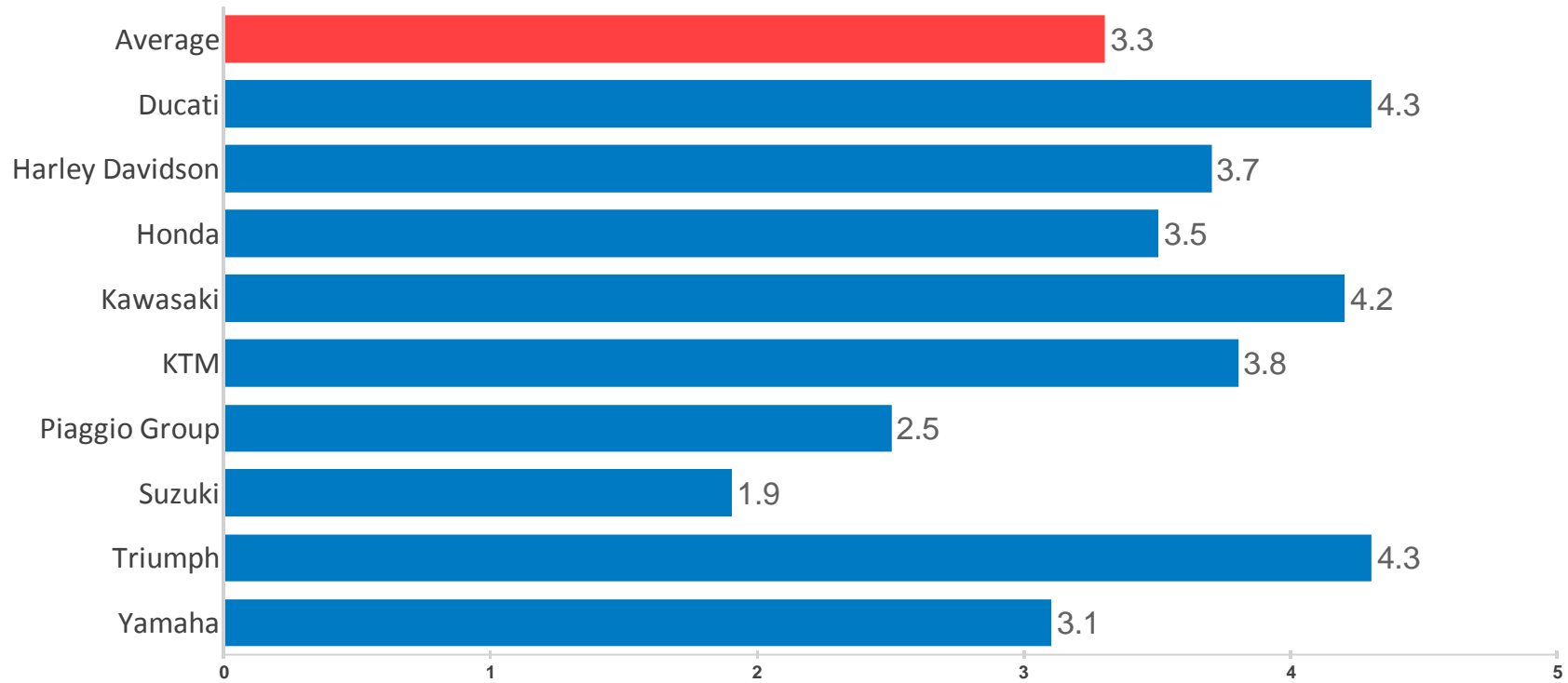


PREVIOUS SURVEY RESULTS – SPRING 2019

8b: The product image			
BMW	4.4	Suzuki	3.3
Ducati	5.0	Triumph	4.6
Harley Davidson	4.1	Yamaha	3.6
Honda	4.1		
Kawasaki	4.0		
KTM	4.3		
Piaggio Group	2.2	AVERAGE	3.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q8 c) Frequency of introduction of new models

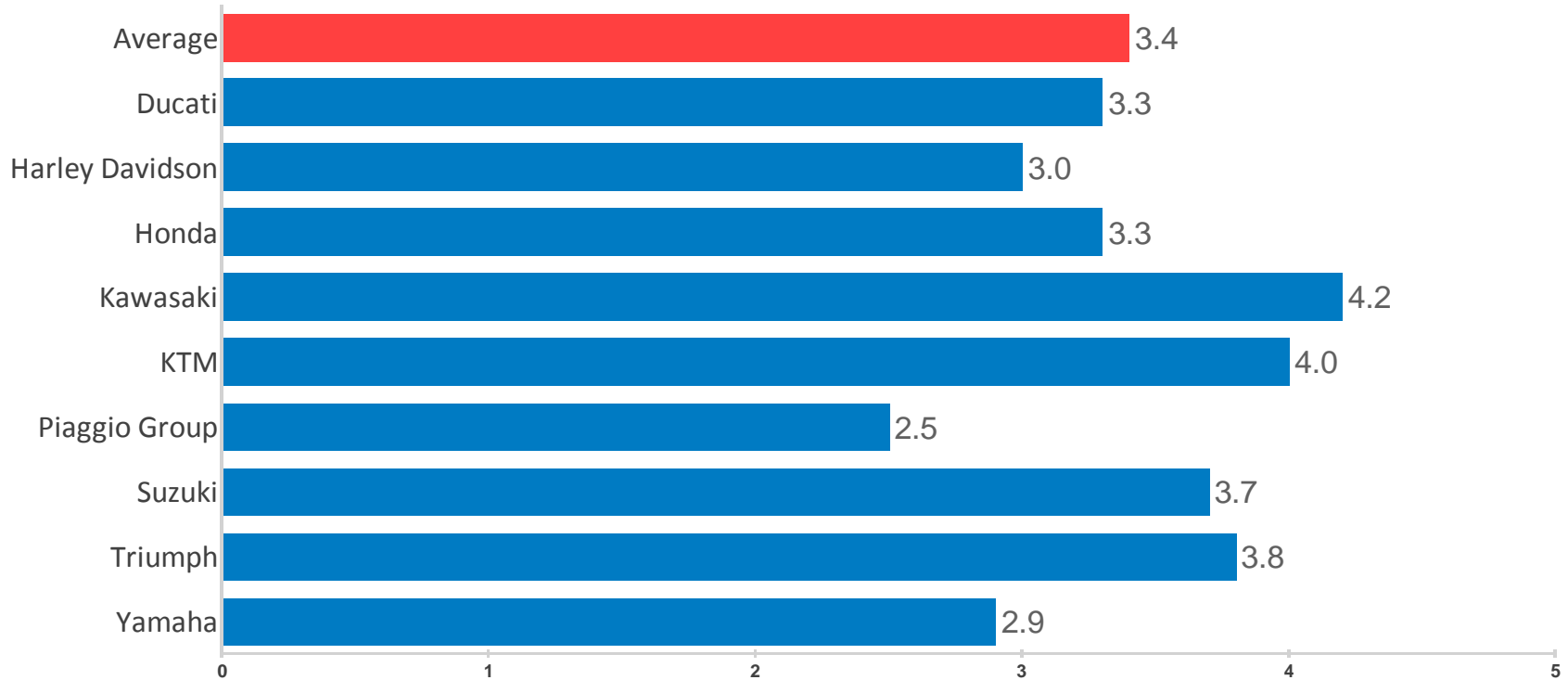


PREVIOUS SURVEY RESULTS – SPRING 2019

8c: Frequency of introduction of new models			
BMW	4.2	Suzuki	2.6
Ducati	4.5	Triumph	4.2
Harley Davidson	3.4	Yamaha	3.2
Honda	3.7		
Kawasaki	4.2		
KTM	4.3		
Piaggio	1.7	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q8 d) Retail sales incentives and promotions

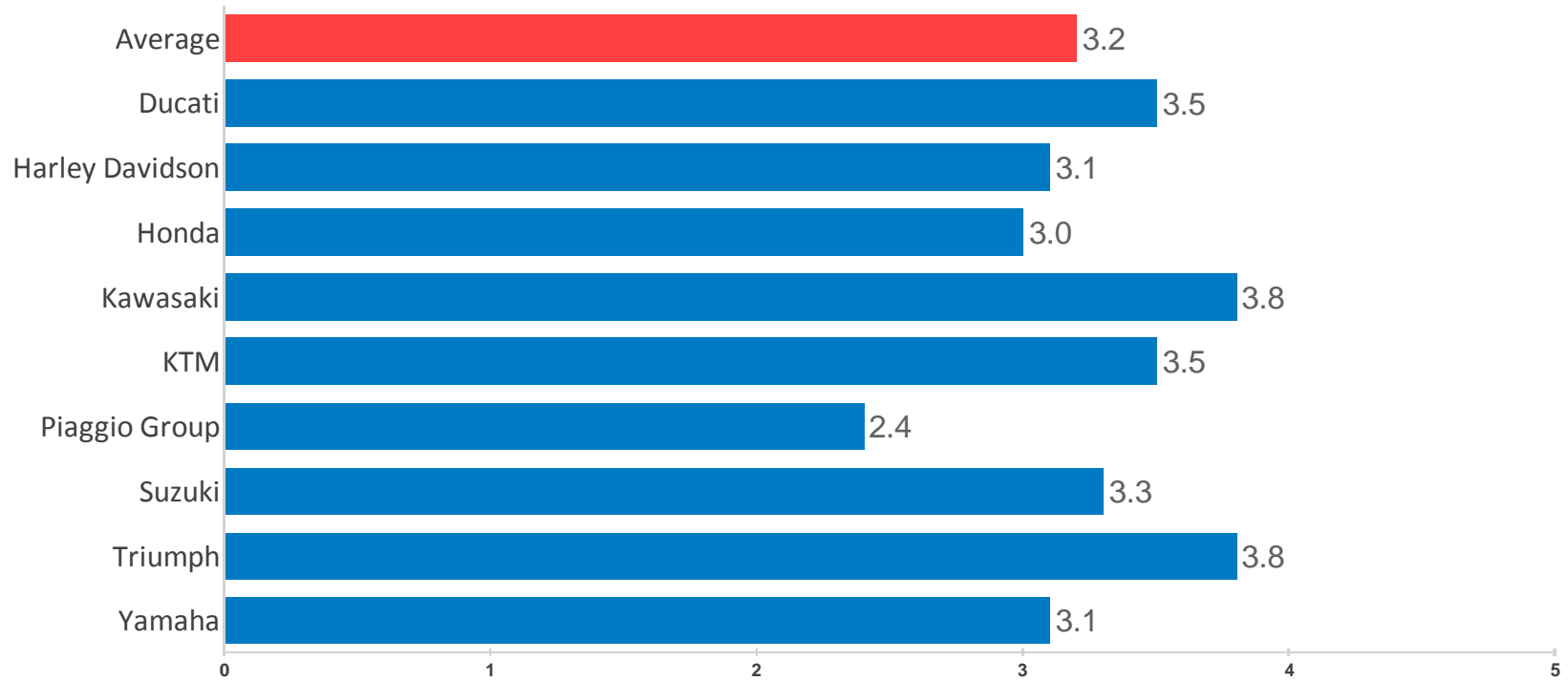


PREVIOUS SURVEY RESULTS – SPRING 2019

8d: Retail sales incentives and promotions			
BMW	3.8	Suzuki	3.6
Ducati	4.0	Triumph	3.9
Harley Davidson	2.6	Yamaha	2.8
Honda	3.6		
Kawasaki	3.8		
KTM	4.0		
Piaggio Group	1.7	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q8 e) Product advertising

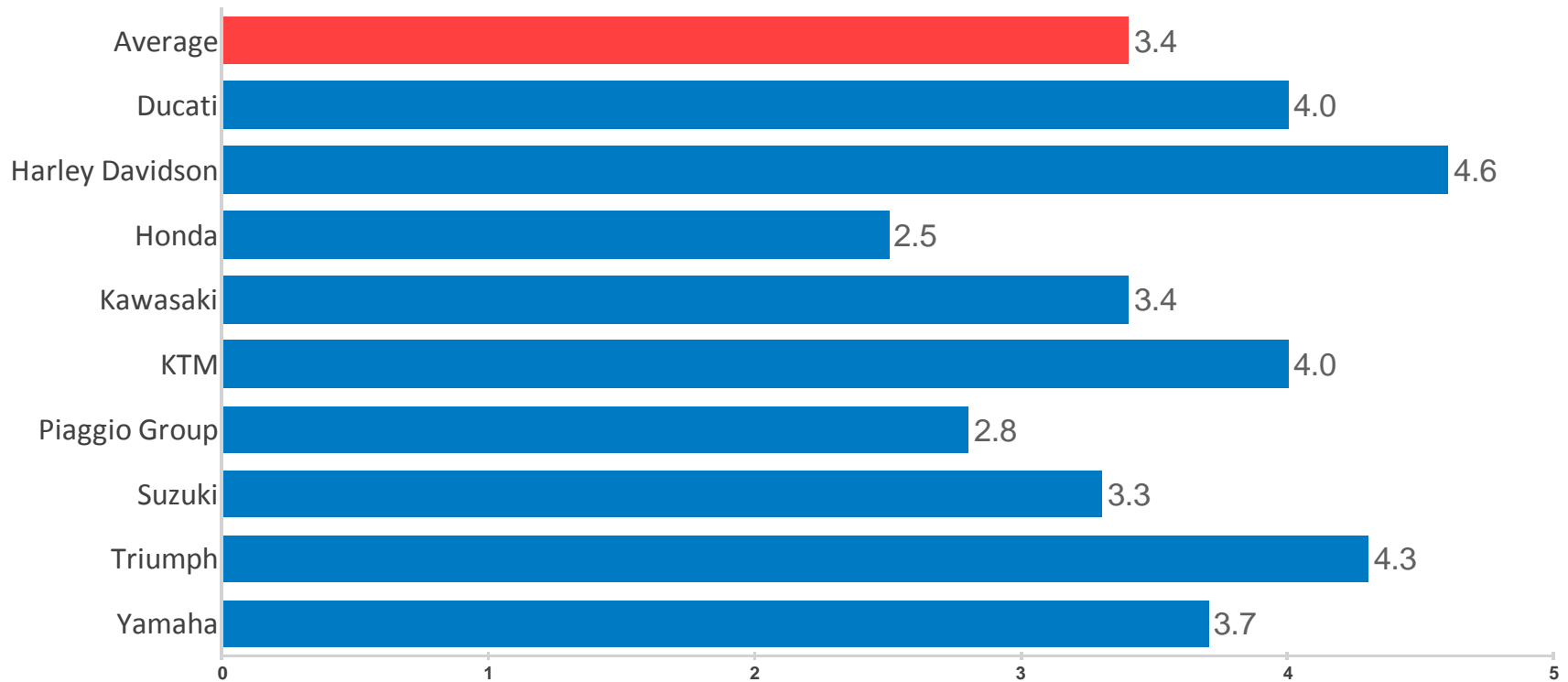


PREVIOUS SURVEY RESULTS – SPRING 2019

8e: Product advertising			
BMW	3.4	Suzuki	3.4
Ducati	4.5	Triumph	4.1
Harley Davidson	3.5	Yamaha	2.6
Honda	3.4		
Kawasaki	3.5		
KTM	3.7		
Piaggio Group	1.5	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

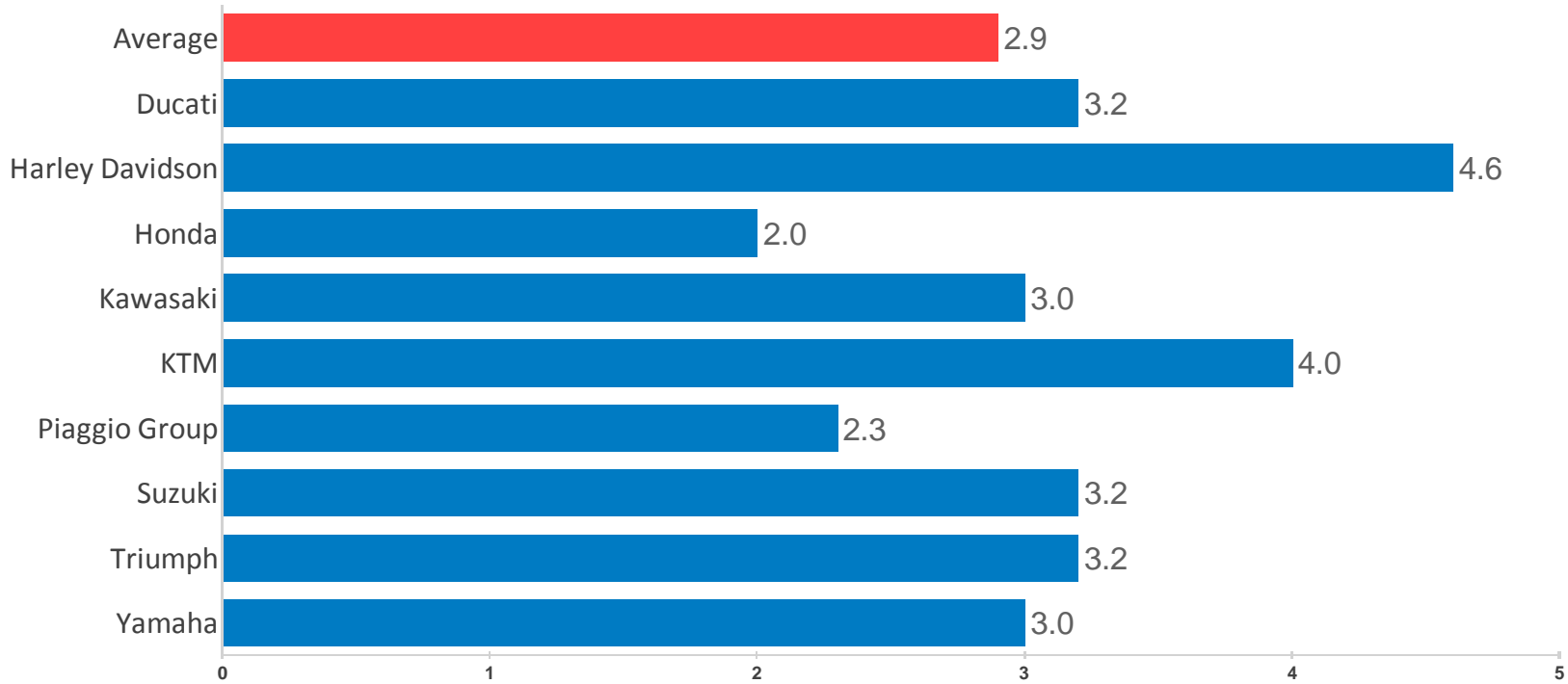


PREVIOUS SURVEY RESULTS – SPRING 2019

8f: Have a comprehensive accessory offering that appeals to customers			
BMW	3.8	Suzuki	3.7
Ducati	4.5	Triumph	4.5
Harley Davidson	4.6	Yamaha	3.8
Honda	3.0		
Kawasaki	3.5		
KTM	4.7		
Piaggio Group	1.9	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

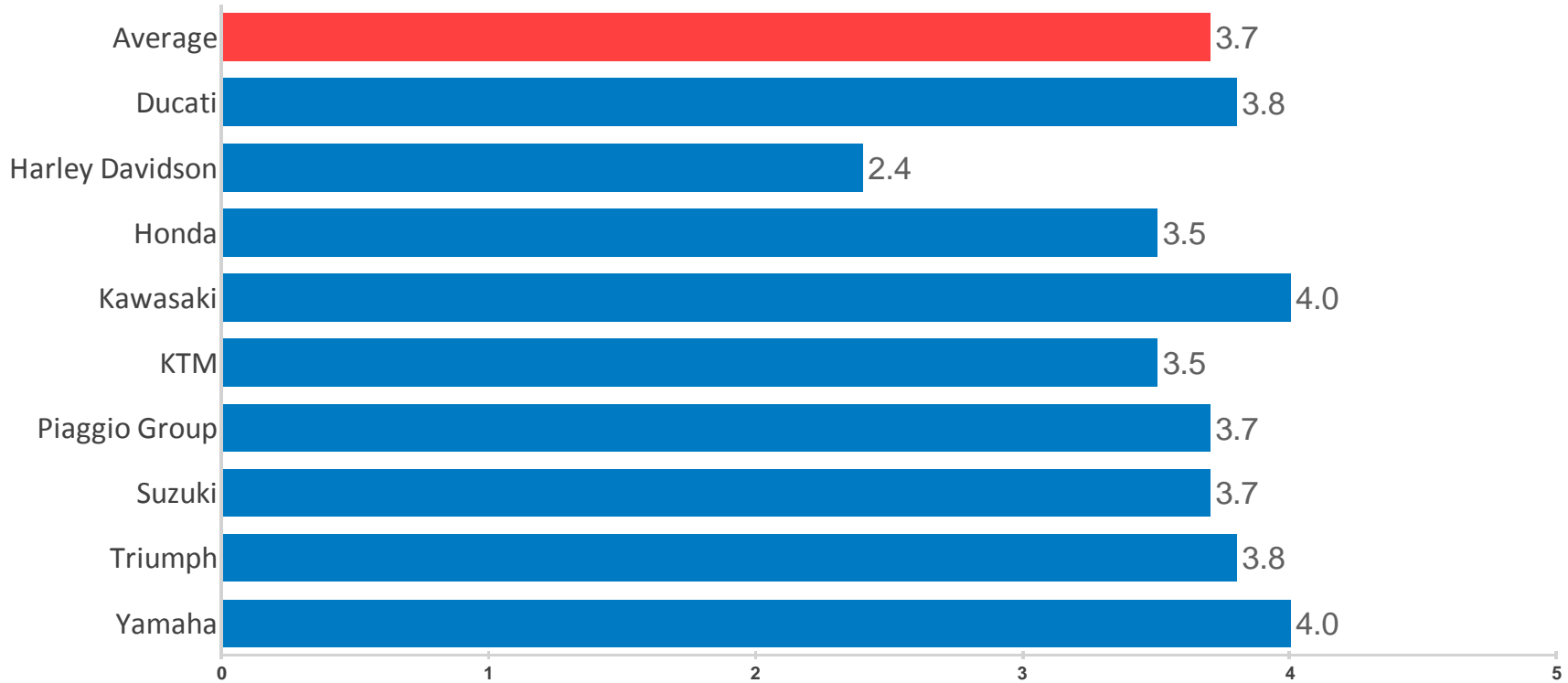


PREVIOUS SURVEY RESULTS – SPRING 2019

8g: Have a comprehensive clothing offering that appeals to customers			
BMW	3.2	Suzuki	3.4
Ducati	3.5	Triumph	3.4
Harley Davidson	4.6	Yamaha	3.2
Honda	2.5		
Kawasaki	3.4		
KTM	3.7		
Piaggio Group	1.6	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

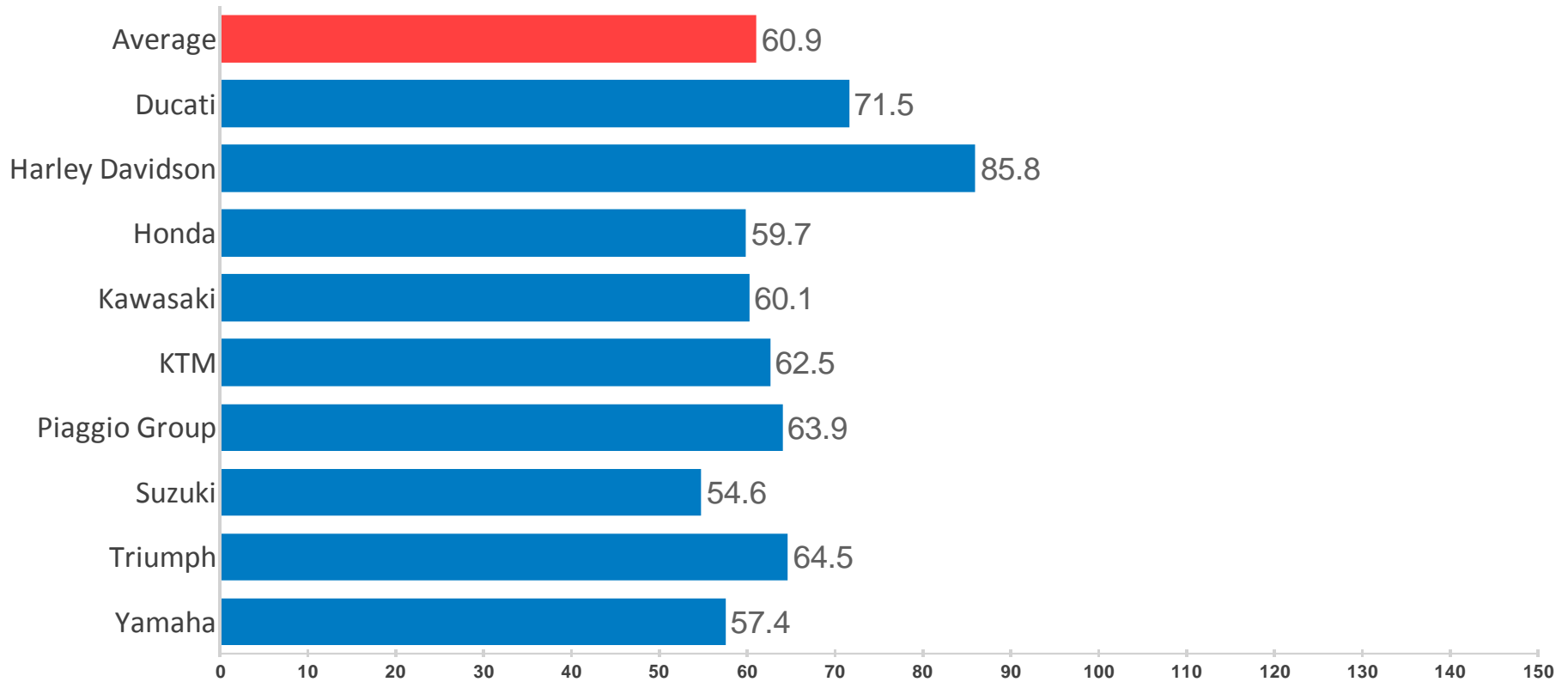


PREVIOUS SURVEY RESULTS – SPRING 2019

9: The fairness of your manufacturer's warranty policy			
BMW	4.2	Suzuki	3.9
Ducati	4.0	Triumph	3.6
Harley Davidson	2.8	Yamaha	4.0
Honda	3.6		
Kawasaki	4.2		
KTM	3.0		
Piaggio Group	2.6	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

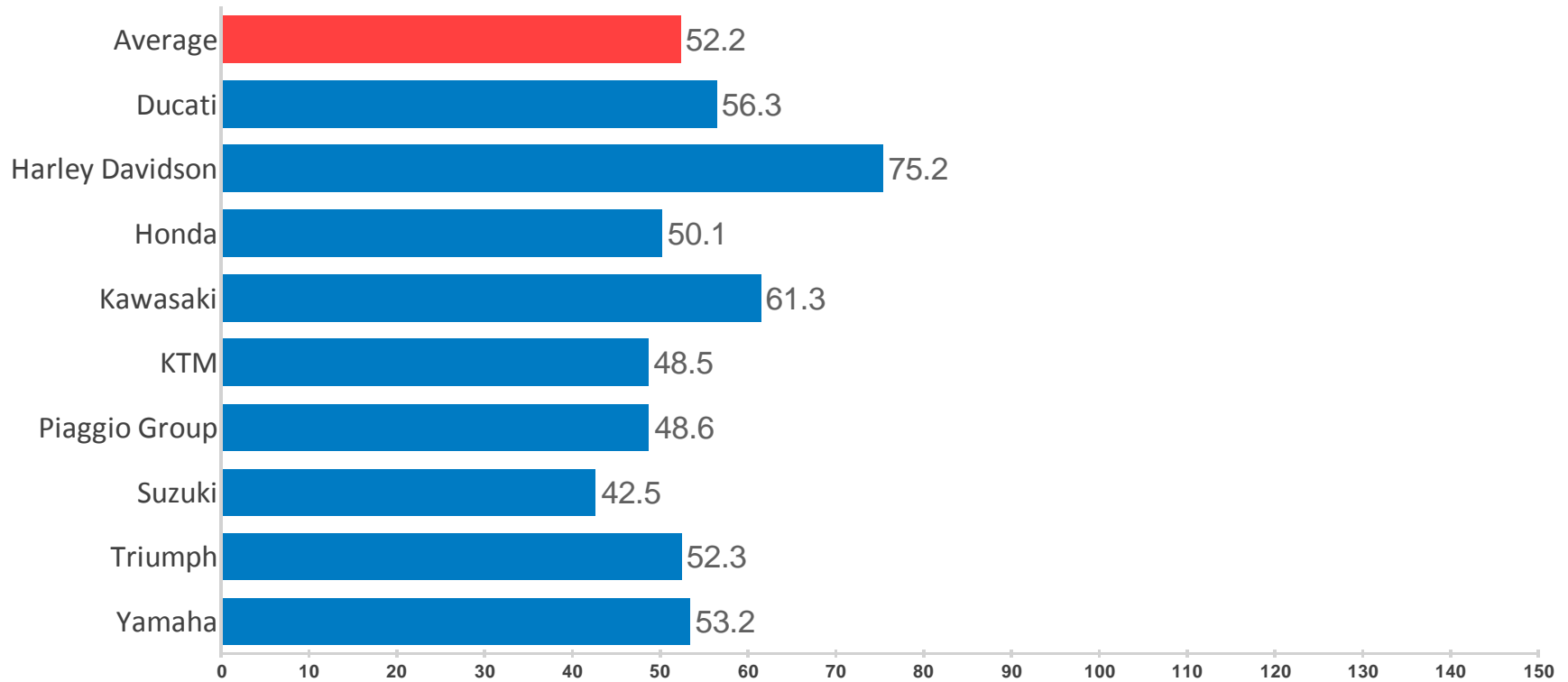


PREVIOUS SURVEY RESULTS – SPRING 2019

10: What is your labour rate for retail (£)			
BMW	83.4	Suzuki	50.2
Ducati	62.0	Triumph	65.5
Harley Davidson	81.6	Yamaha	59.1
Honda	60.0		
Kawasaki	53.6		
KTM	59.0		
Piaggio Group	59.6	AVERAGE	62.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

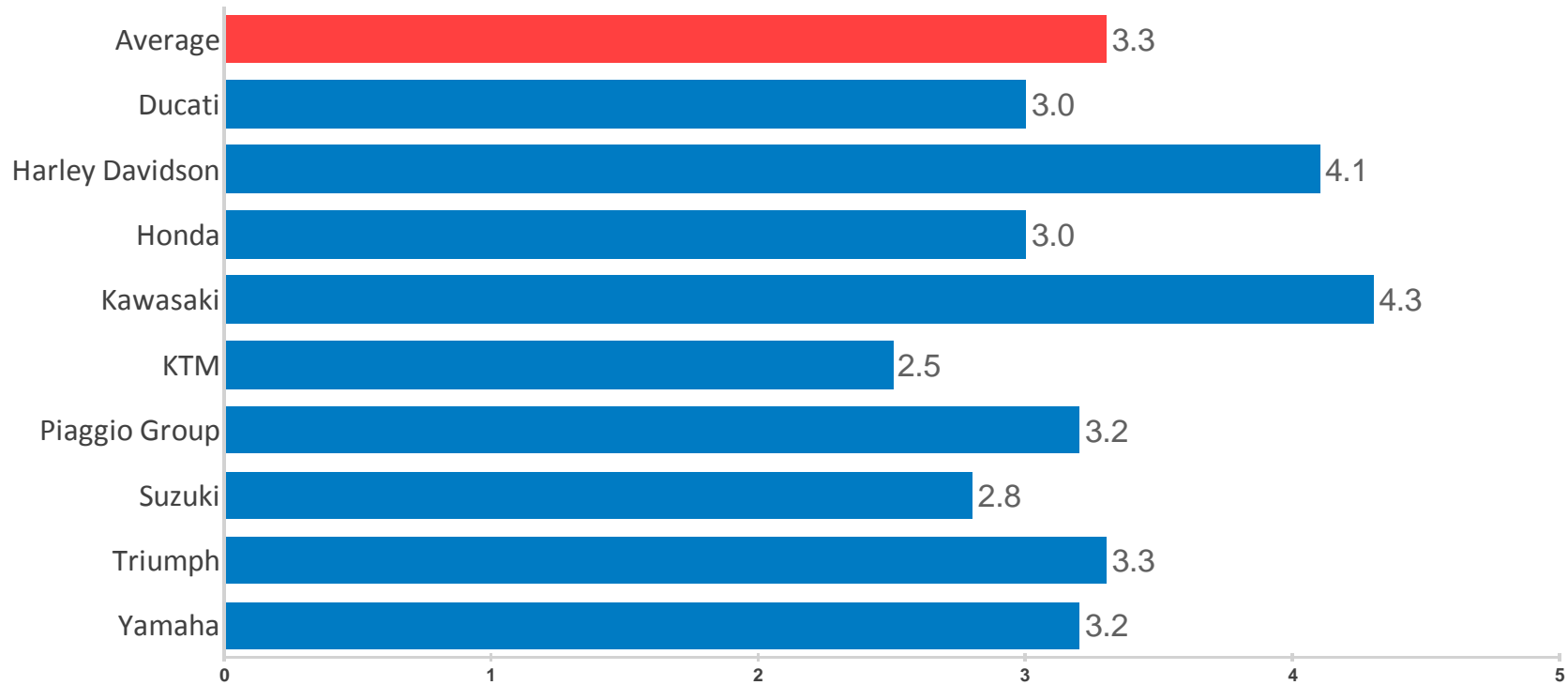


PREVIOUS SURVEY RESULTS – SPRING 2019

11. What is your labour rate for warranty (£)			
BMW	63.4	Suzuki	40.3
Ducati	48.5	Triumph	52.3
Harley Davidson	81.6	Yamaha	47.2
Honda	51.0		
Kawasaki	52.0		
KTM	37.0		
Piaggio Group	41.3	AVERAGE	52.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q12 a) Warranty labour rate

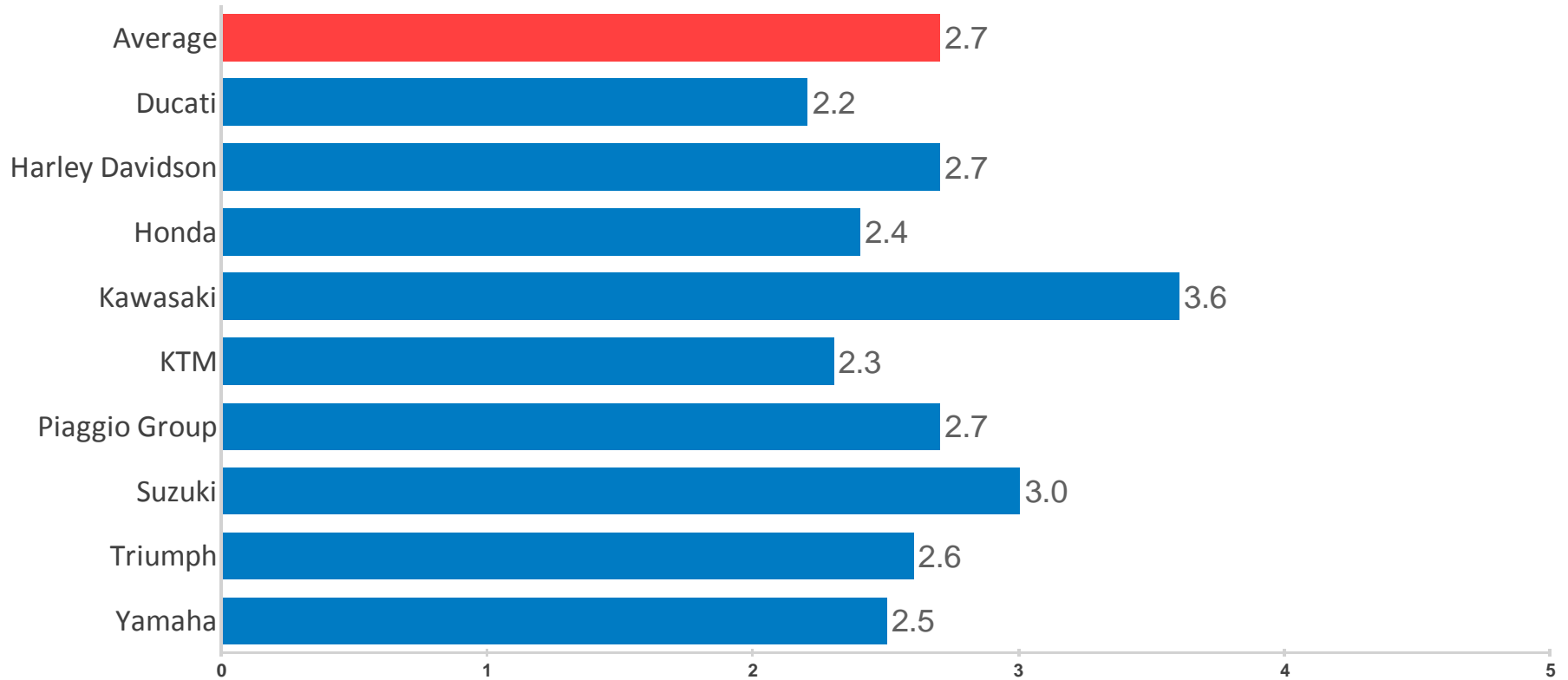


PREVIOUS SURVEY RESULTS – SPRING 2019

12a: Warranty labour rate			
BMW	4.0	Suzuki	3.2
Ducati	3.5	Triumph	3.1
Harley Davidson	4.6	Yamaha	2.9
Honda	3.6		
Kawasaki	4.2		
KTM	3.0		
Piaggio Group	2.1	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q12 b) Warranty time allowances

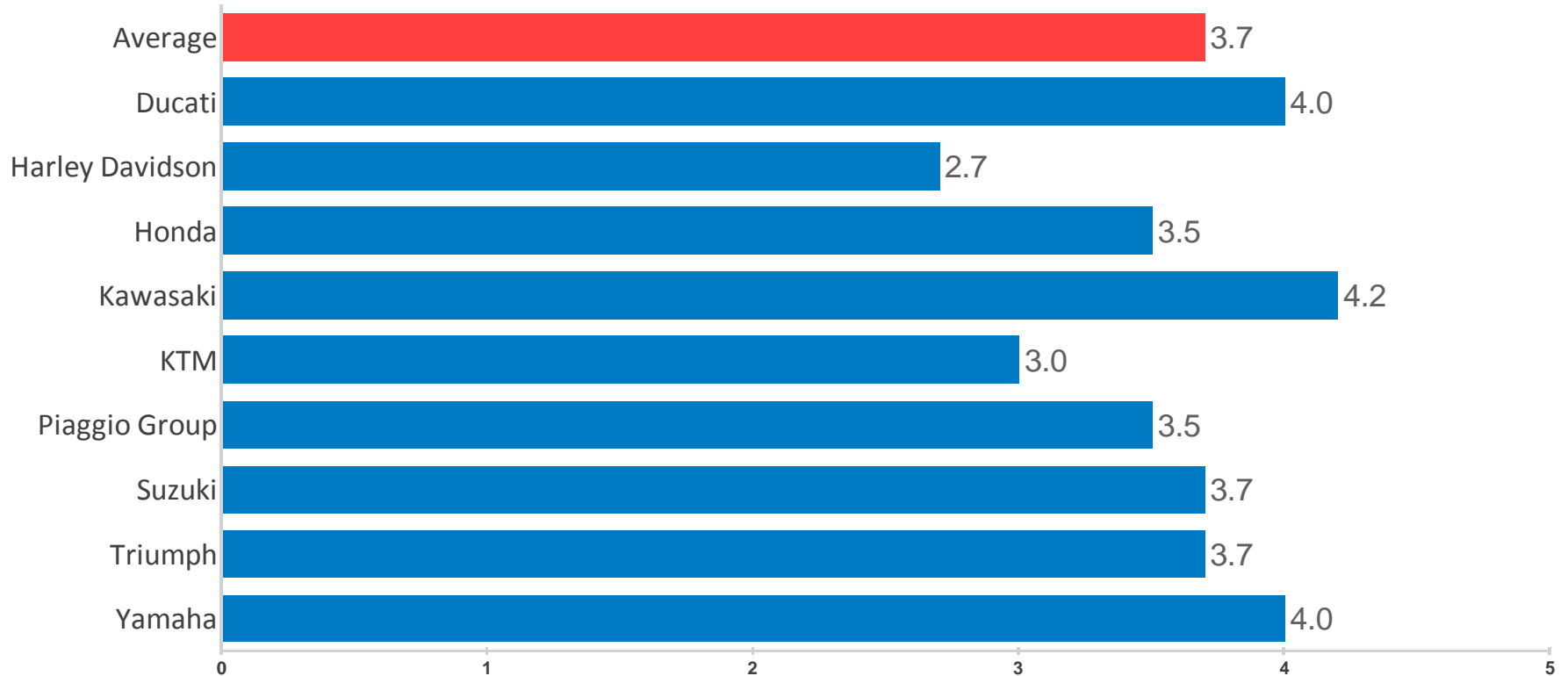


PREVIOUS SURVEY RESULTS – SPRING 2019

12b: Warranty time allowances			
BMW	3.0	Suzuki	2.6
Ducati	2.0	Triumph	2.4
Harley Davidson	2.8	Yamaha	2.4
Honda	2.9		
Kawasaki	3.6		
KTM	3.0		
Piaggio Group	1.8	AVERAGE	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q12 c) Warranty replacement parts policy

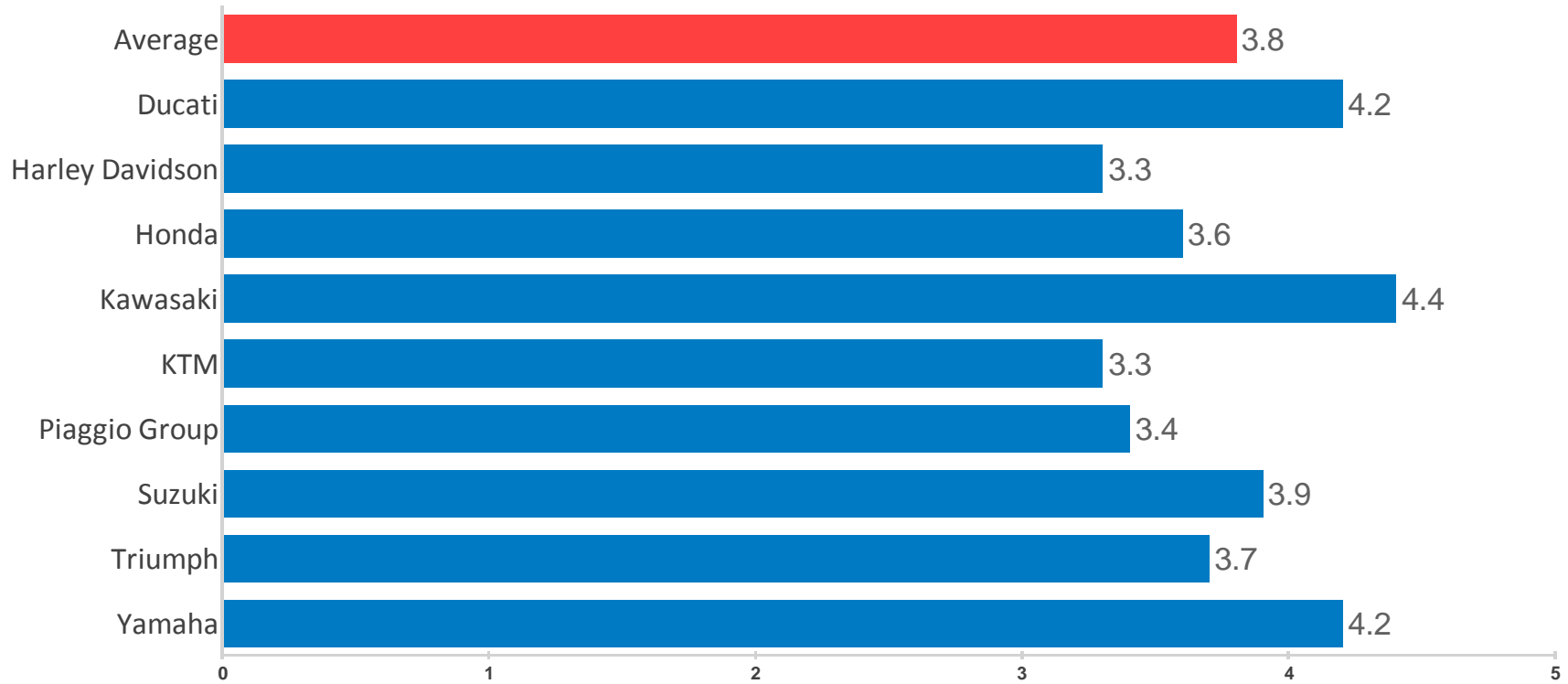


PREVIOUS SURVEY RESULTS – SPRING 2019

12c: Warranty replacement parts policy			
BMW	4.4	Suzuki	3.4
Ducati	3.5	Triumph	4.0
Harley Davidson	2.8	Yamaha	3.7
Honda	3.7		
Kawasaki	4.2		
KTM	3.0		
Piaggio Group	2.2	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q12 d) Timely and fair settlement of warranty claims

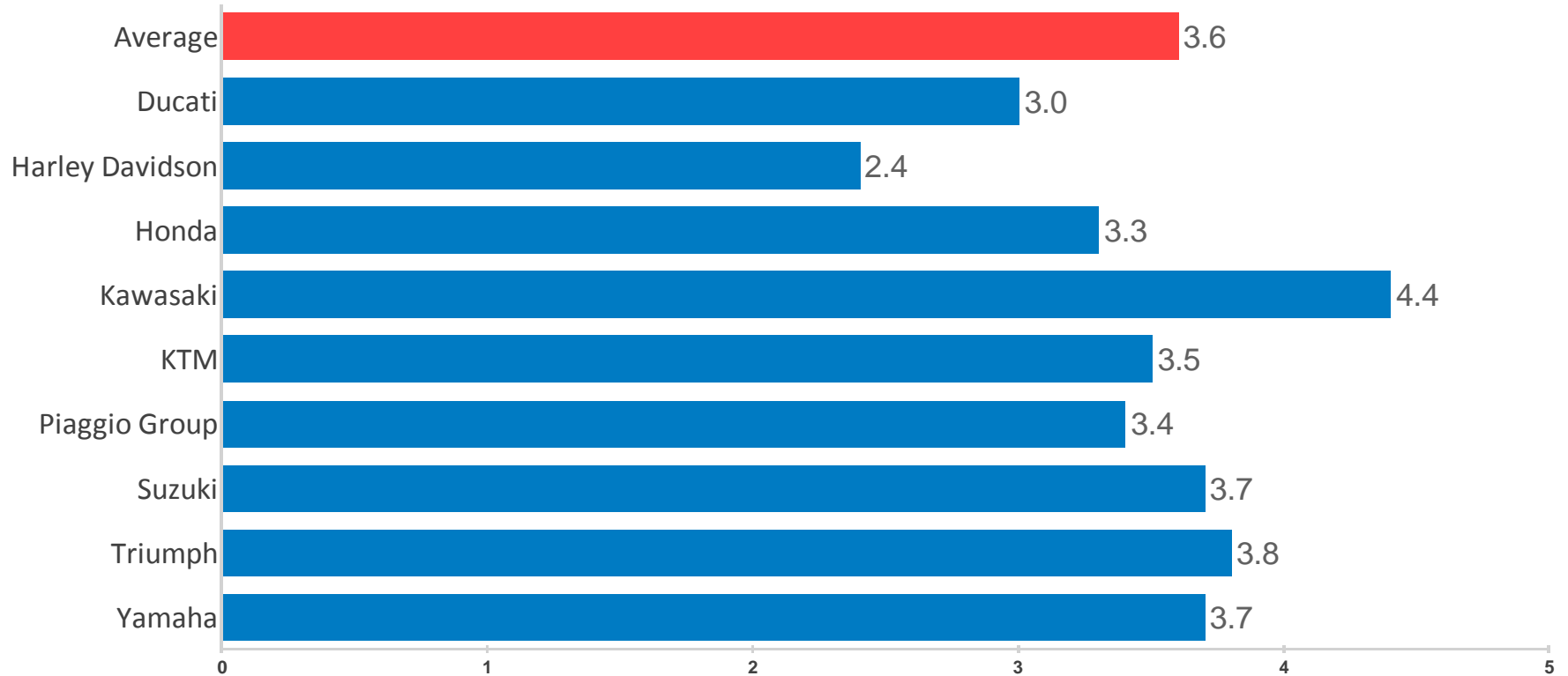


PREVIOUS SURVEY RESULTS – SPRING 2019

12d: Timely and fair settlement of warranty claims			
BMW	4.4	Suzuki	3.8
Ducati	4.0	Triumph	4.2
Harley Davidson	3.2	Yamaha	3.7
Honda	4.0		
Kawasaki	4.2		
KTM	3.0		
Piaggio Group	2.2	AVERAGE	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q12 e) Quality and availability of technical support

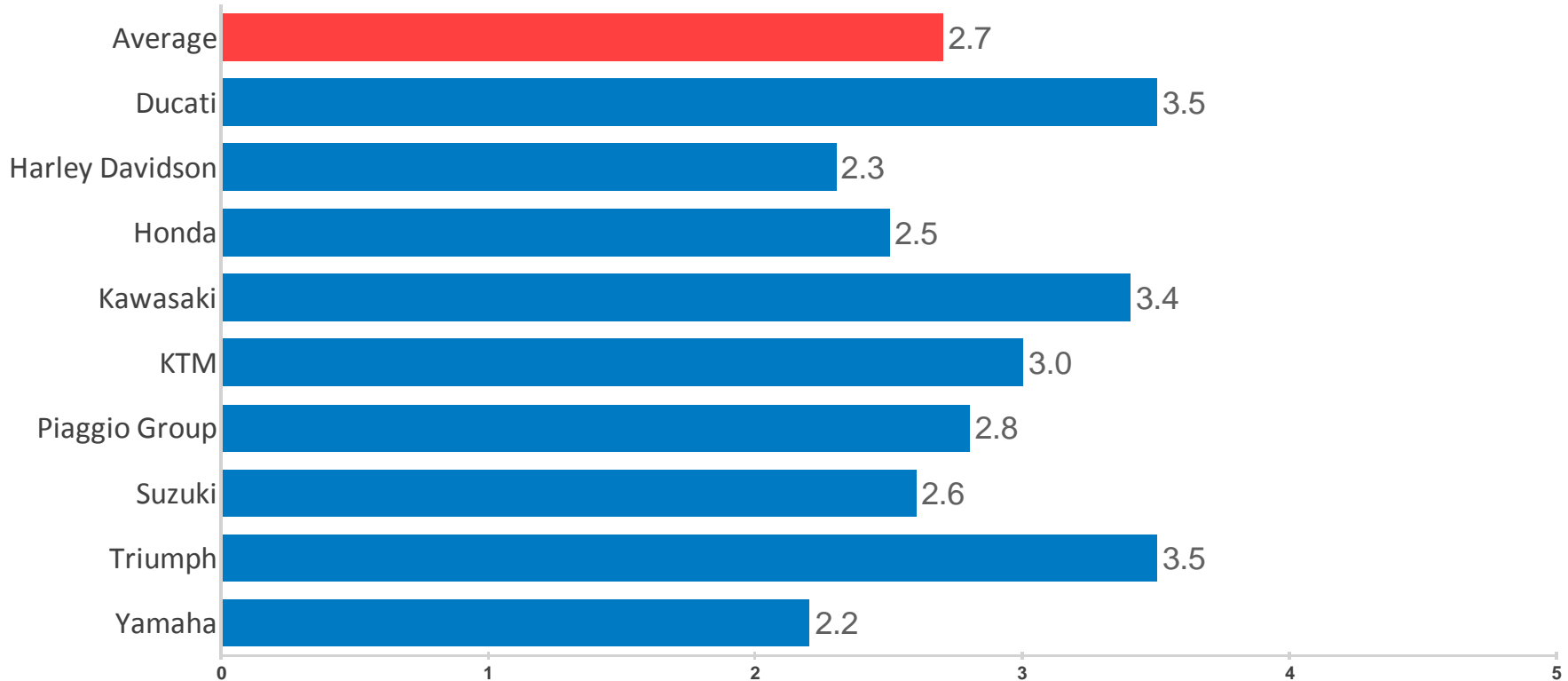


PREVIOUS SURVEY RESULTS – SPRING 2019

12e: Quality and availability of technical support			
BMW	4.4	Suzuki	3.4
Ducati	3.5	Triumph	3.8
Harley Davidson	2.4	Yamaha	3.3
Honda	3.5		
Kawasaki	4.2		
KTM	3.0		
Piaggio Group	2.1	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

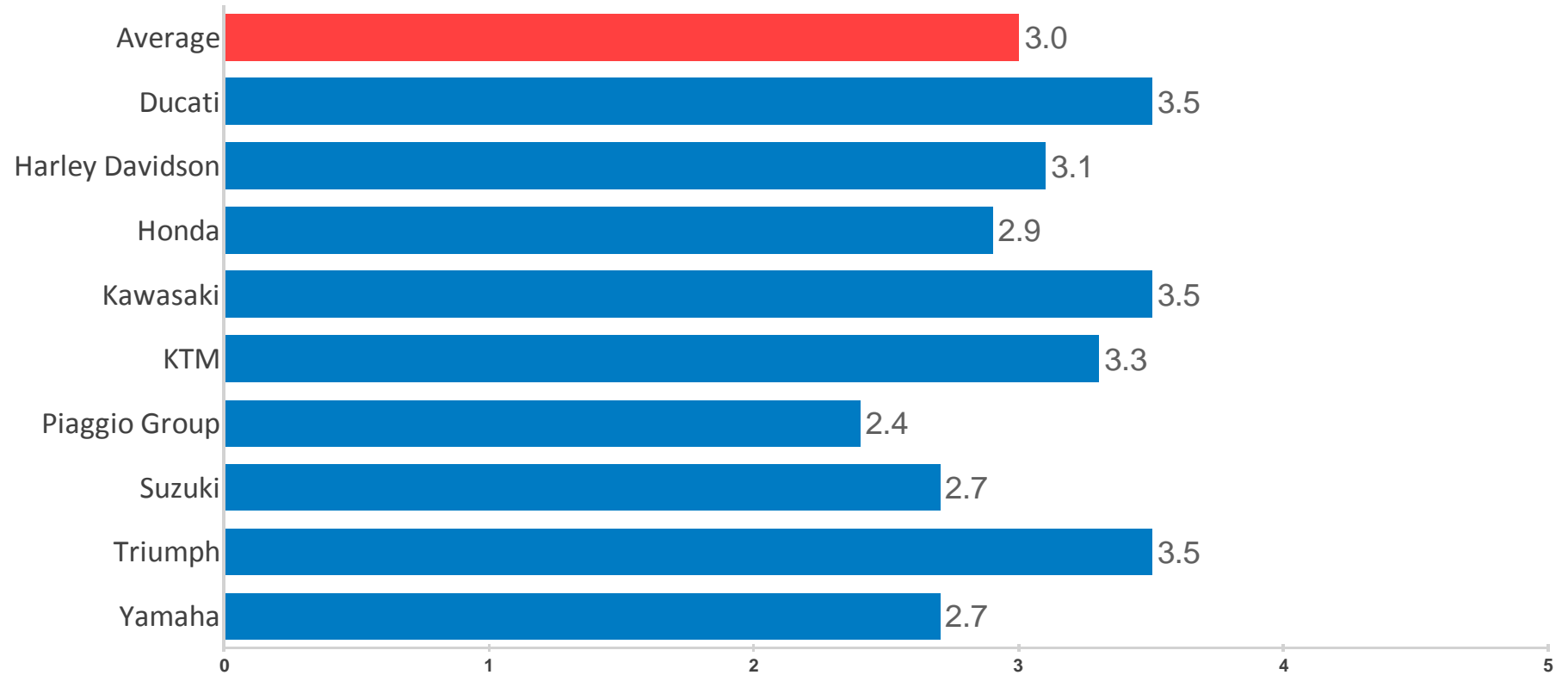


PREVIOUS SURVEY RESULTS – SPRING 2019

13: The profit return by representing your franchise			
BMW	2.0	Suzuki	2.5
Ducati	3.5	Triumph	3.5
Harley Davidson	2.4	Yamaha	2.4
Honda	3.1		
Kawasaki	2.6		
KTM	2.3		
Piaggio Group	1.9	AVERAGE	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q14 a) The future profitability of your business

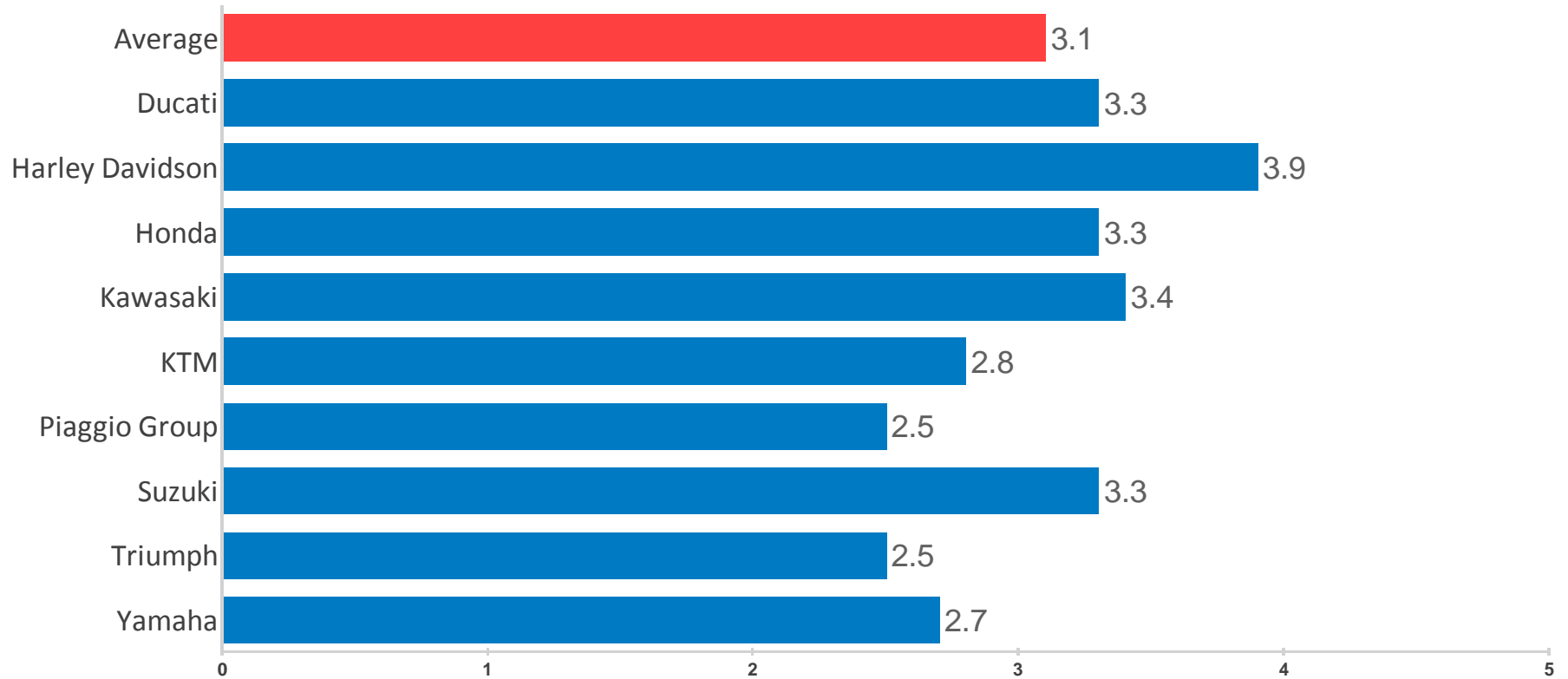


PREVIOUS SURVEY RESULTS – SPRING 2019

14a: The future profitability of your business			
BMW	2.2	Suzuki	3.3
Ducati	4.0	Triumph	3.6
Harley Davidson	2.4	Yamaha	2.6
Honda	3.3		
Kawasaki	2.8		
KTM	2.3		
Piaggio Group	1.9	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q14 b) Your stocking plan for this franchise

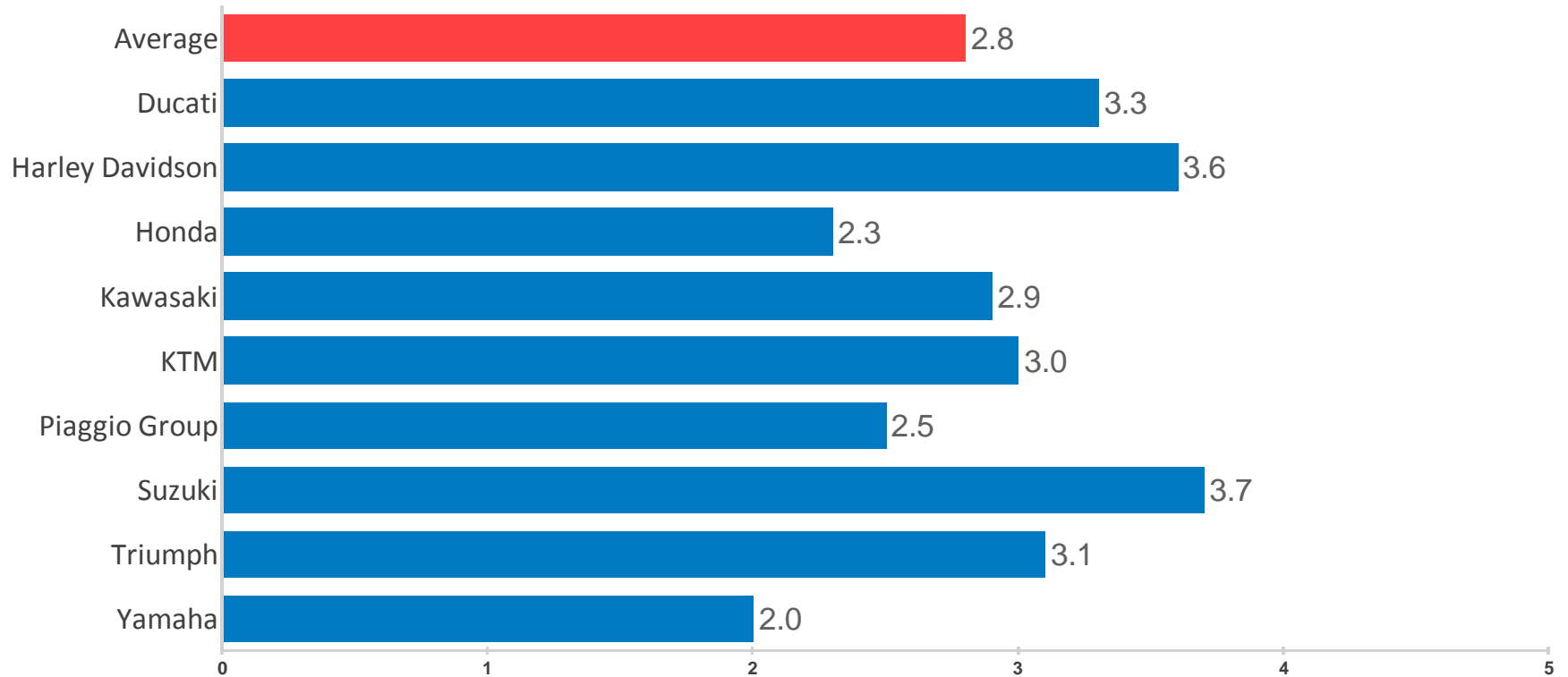


PREVIOUS SURVEY RESULTS – SPRING 2019

14b: Your stocking plan for this franchise			
BMW	3.8	Suzuki	3.3
Ducati	3.5	Triumph	2.3
Harley Davidson	3.1	Yamaha	3.0
Honda	3.6		
Kawasaki	3.2		
KTM	4.0		
Piaggio Group	1.9	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q15 a) The dealer standards expected by your manufacturer

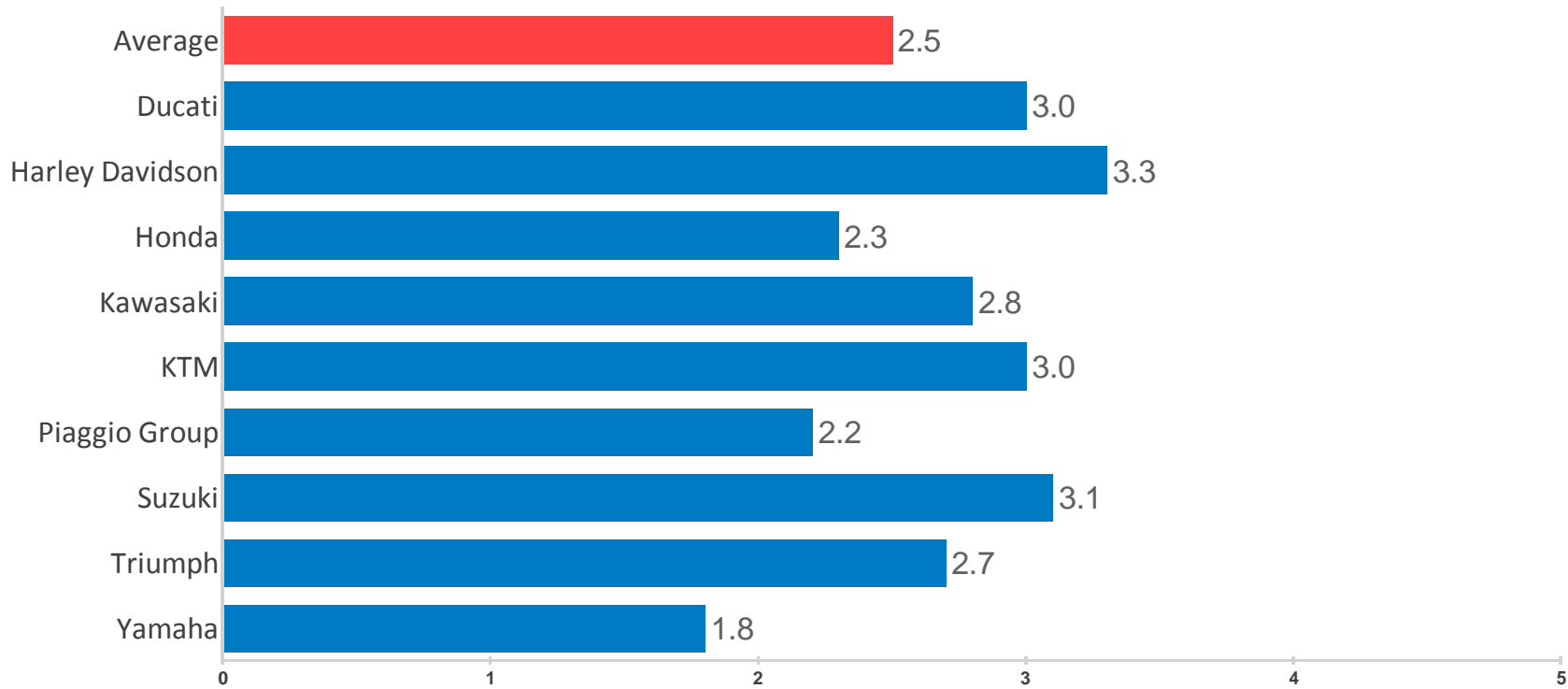


PREVIOUS SURVEY RESULTS – SPRING 2019

15a: The dealer standards expected by your manufacturer			
BMW	3.8	Suzuki	3.2
Ducati	3.5	Triumph	3.1
Harley Davidson	2.6	Yamaha	2.2
Honda	2.8		
Kawasaki	2.4		
KTM	2.3		
Piaggio Group	1.8	AVERAGE	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

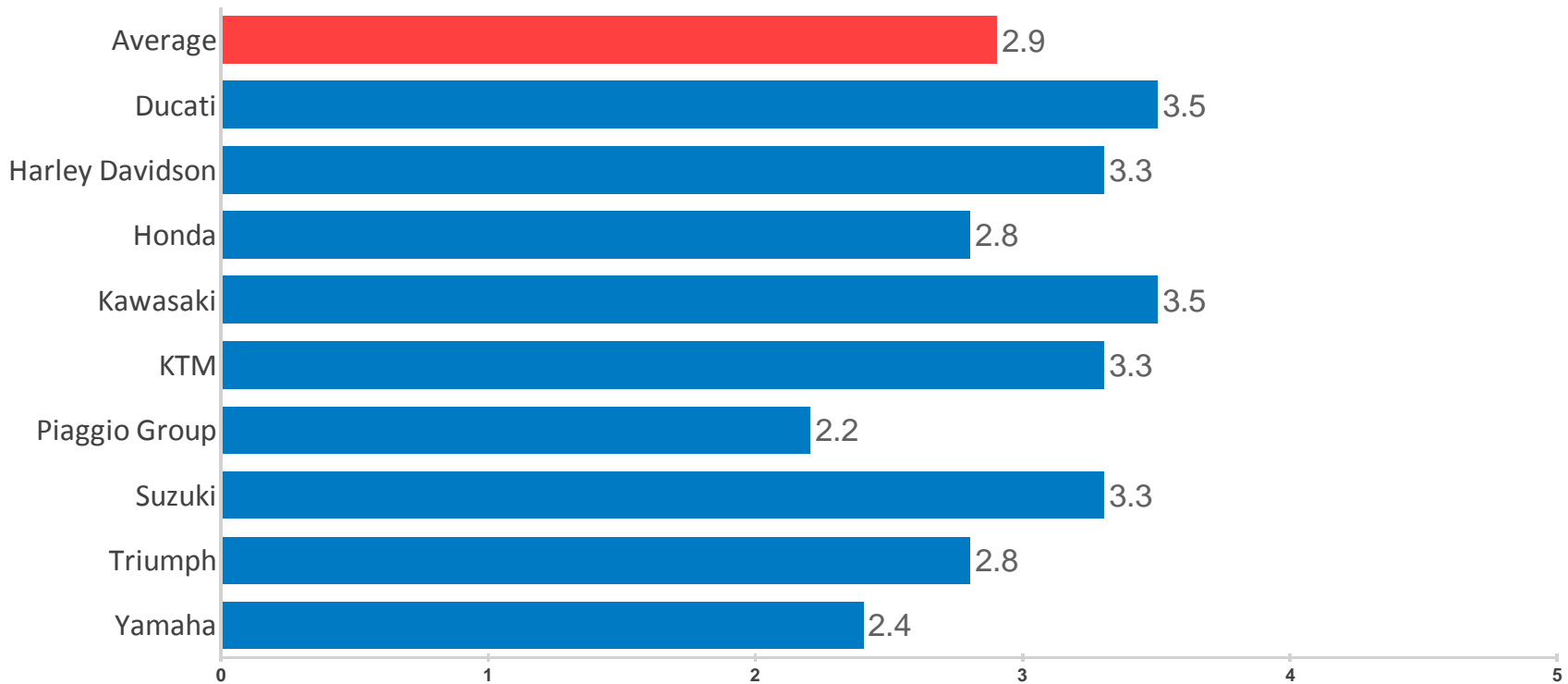


PREVIOUS SURVEY RESULTS – SPRING 2019

15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward			
BMW	2.0	Suzuki	3.0
Ducati	3.0	Triumph	2.5
Harley Davidson	2.4	Yamaha	2.0
Honda	2.8		
Kawasaki	2.2		
KTM	2.3		
Piaggio Group	1.9	AVERAGE	2.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

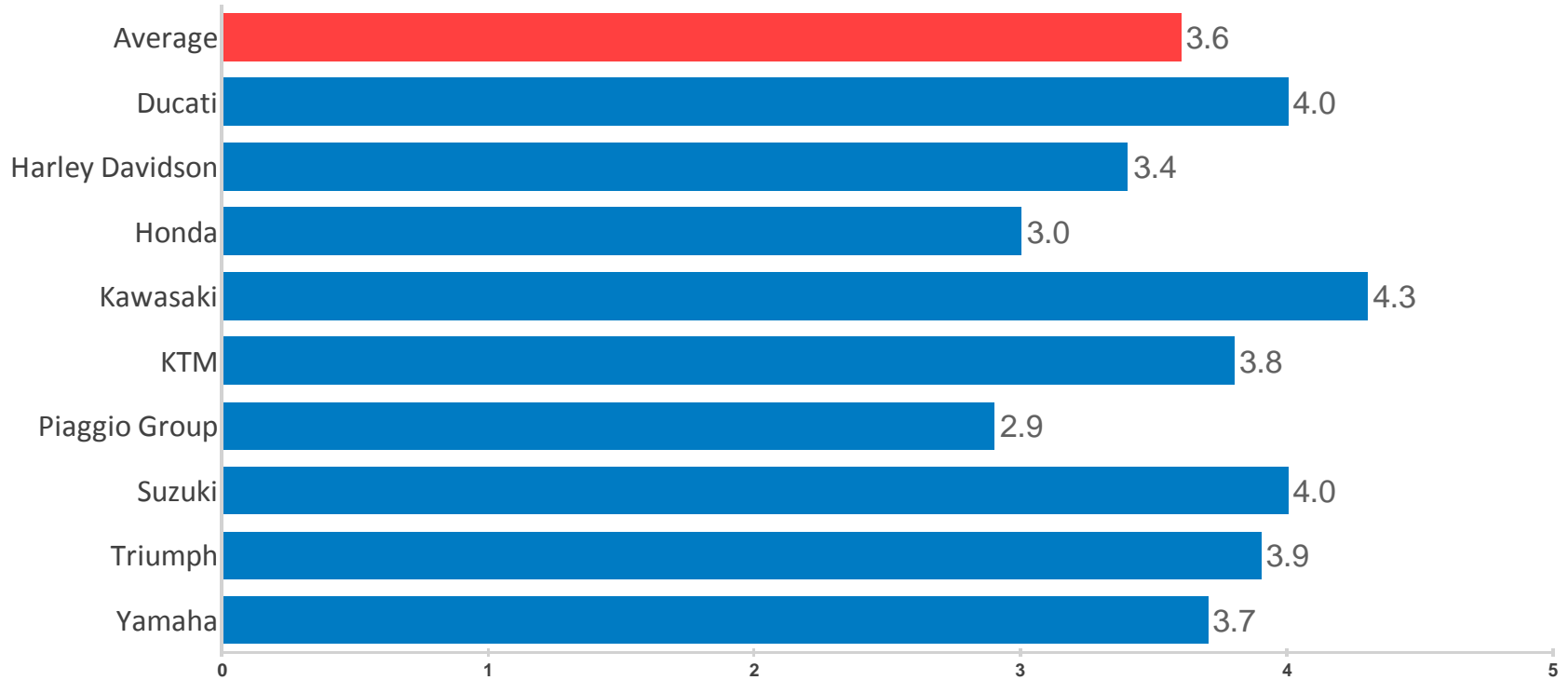


PREVIOUS SURVEY RESULTS – SPRING 2019

16a: That the management of your manufacturer takes dealers' views and opinions into account			
BMW	3.6	Suzuki	2.9
Ducati	3.5	Triumph	3.2
Harley Davidson	2.1	Yamaha	2.0
Honda	2.9		
Kawasaki	2.7		
KTM	2.7		
Piaggio Group	1.8	AVERAGE	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q16 b) The effectiveness of the field sales team

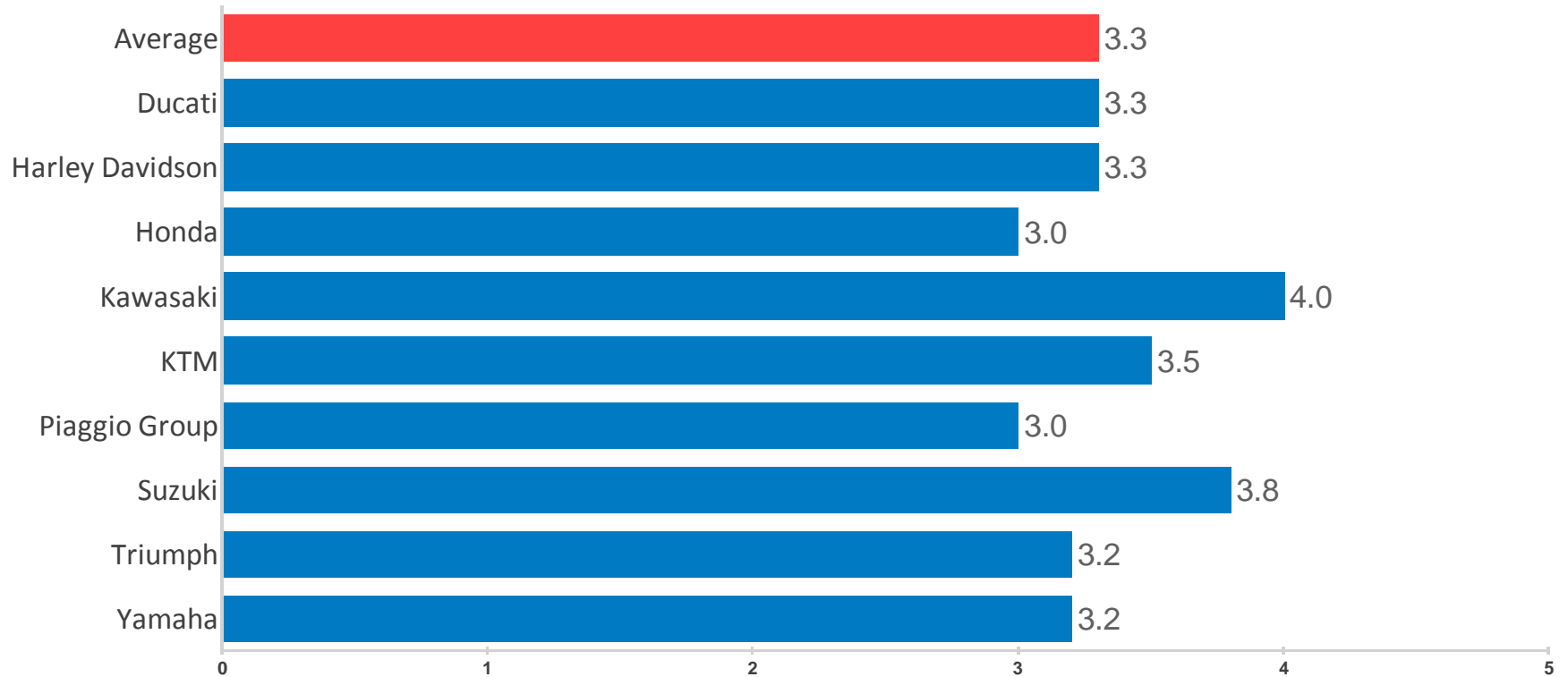


PREVIOUS SURVEY RESULTS – SPRING 2019

16b: The effectiveness of your field sales team			
BMW	2.8	Suzuki	3.6
Ducati	4.0	Triumph	4.4
Harley Davidson	2.3	Yamaha	3.3
Honda	3.5		
Kawasaki	3.0		
KTM	3.0		
Piaggio Group	2.2	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

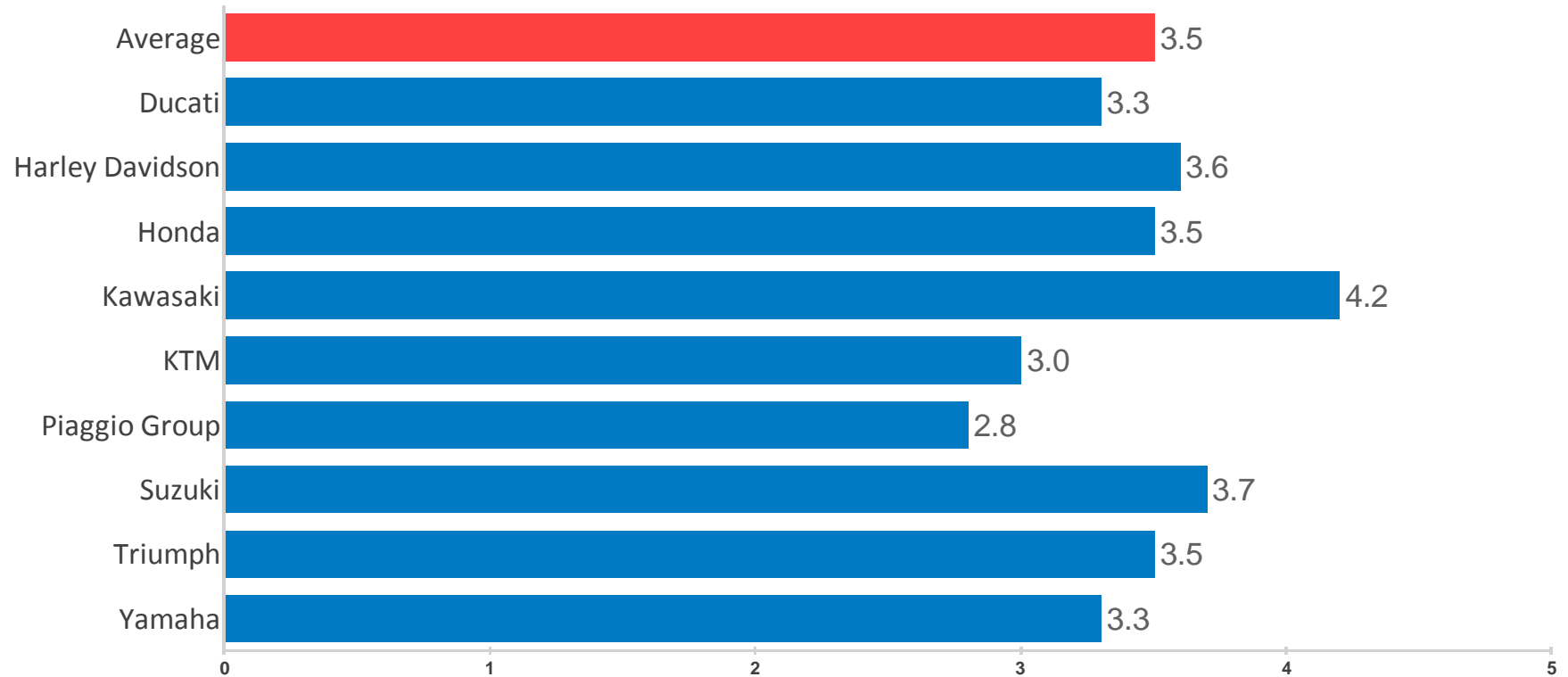


PREVIOUS SURVEY RESULTS – SPRING 2019

16c: The effectiveness of the field service and parts staff			
BMW	1.8	Suzuki	3.6
Ducati	3.0	Triumph	3.9
Harley Davidson	2.2	Yamaha	3.4
Honda	3.3		
Kawasaki	3.3		
KTM	3.0		
Piaggio Group	2.5	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

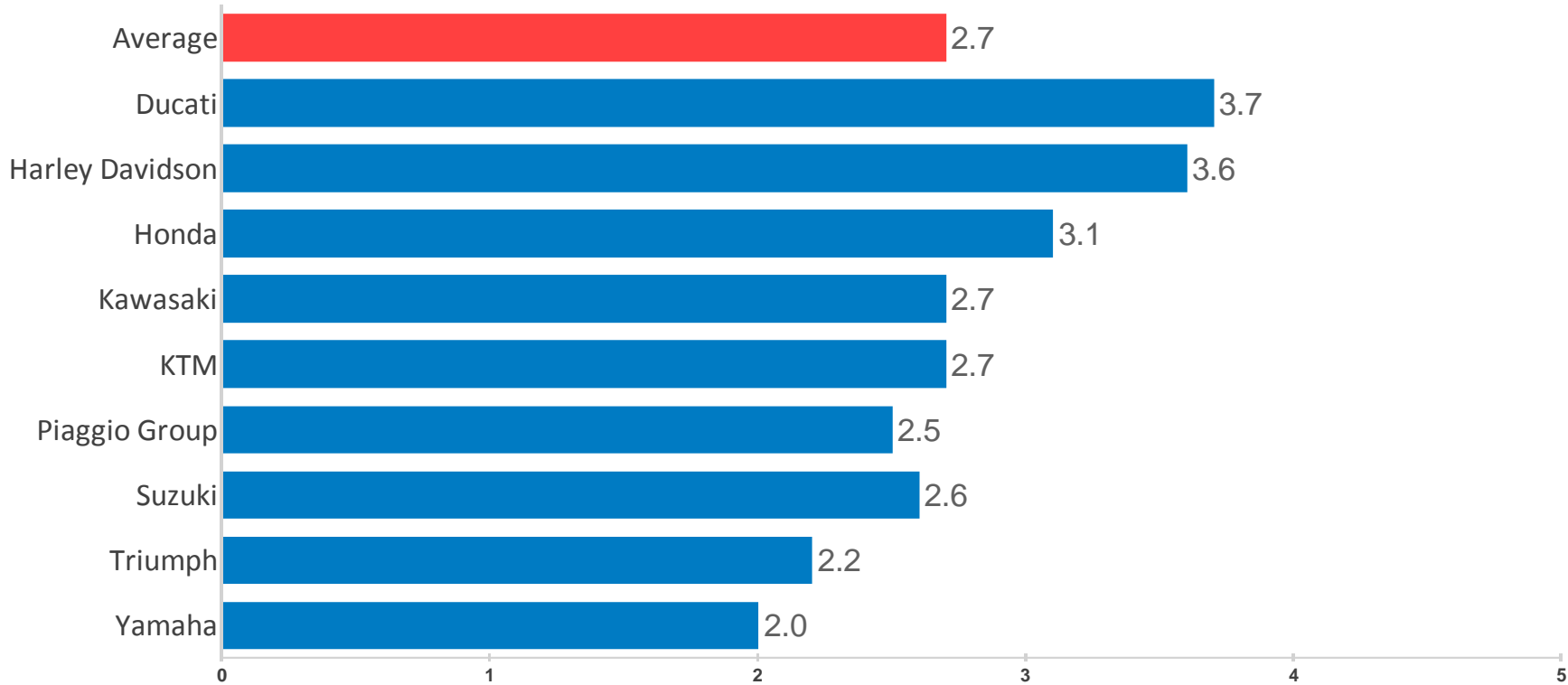


PREVIOUS SURVEY RESULTS – SPRING 2019

16d: The effectiveness of your manufacturer's retail finance programme			
BMW	3.4	Suzuki	4.1
Ducati	4.0	Triumph	3.9
Harley Davidson	3.4	Yamaha	3.2
Honda	4.1		
Kawasaki	3.9		
KTM	3.7		
Piaggio Group	2.1	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

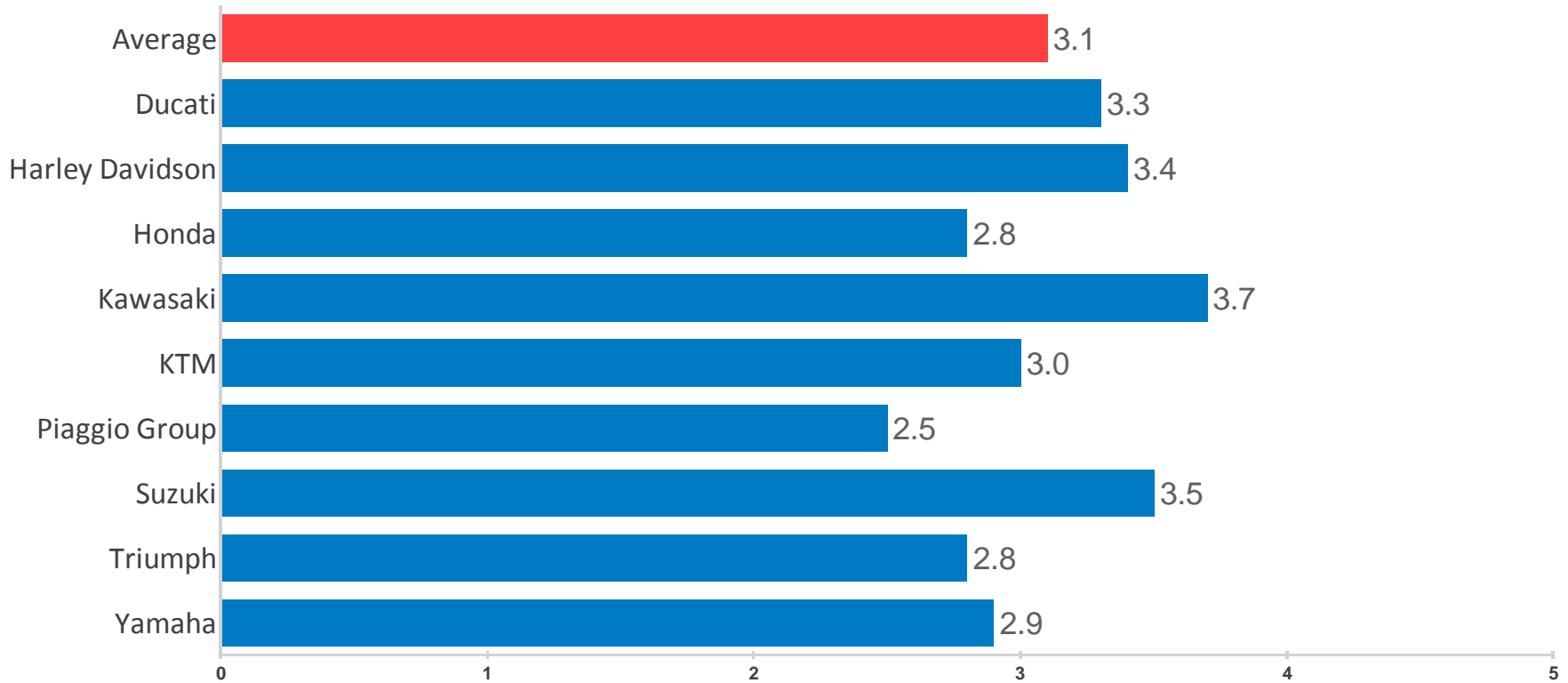


PREVIOUS SURVEY RESULTS – SPRING 2019

16e: The effectiveness of your dealer council and dealer forums			
BMW	3.8	Triumph	3.3
Harley Davidson	2.1	Yamaha	1.8
Honda	3.4		
Kawasaki	2.4		
KTM	2.0		
Piaggio Group	1.4		
Suzuki	2.9	AVERAGE	2.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q17 a) The routine procedures and controls expected

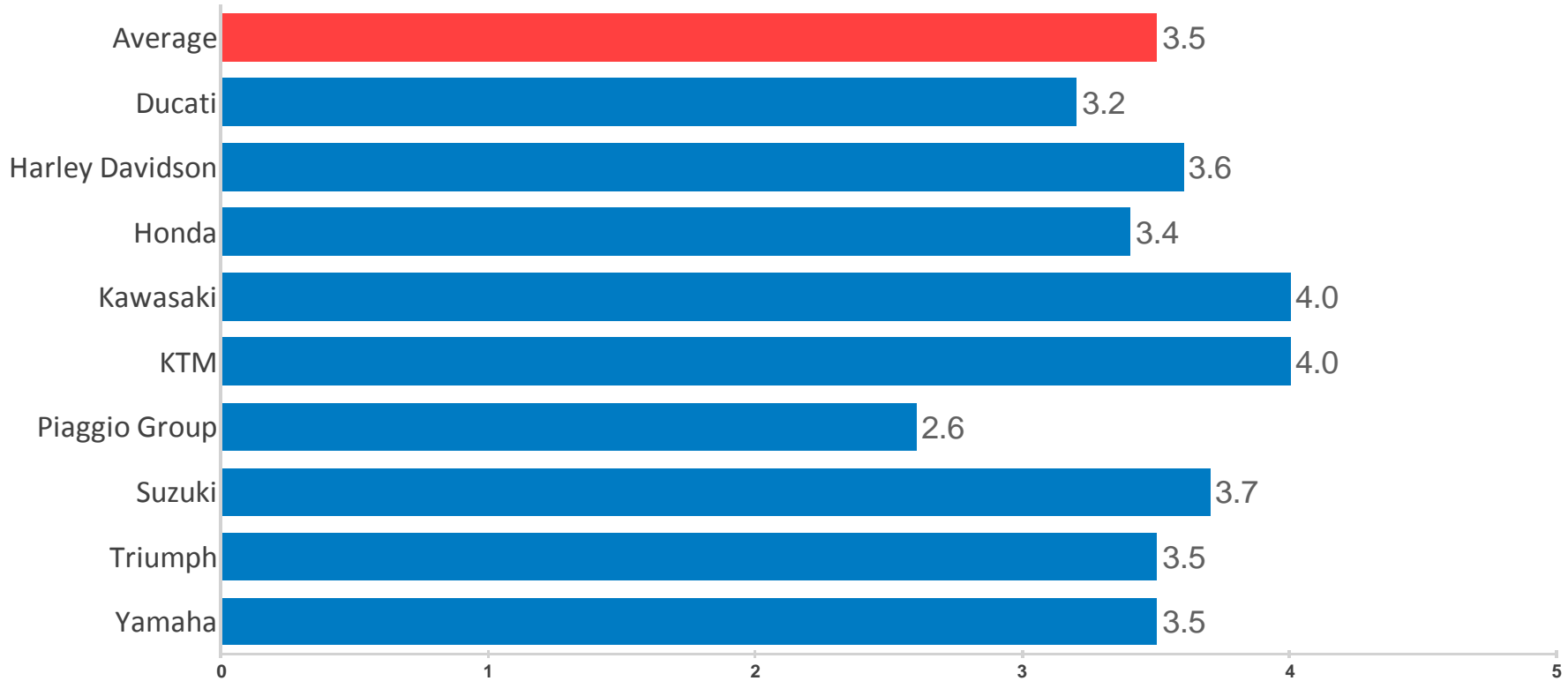


PREVIOUS SURVEY RESULTS – SPRING 2019

17a: The routine procedures and controls expected			
BMW	3.0	Suzuki	3.5
Ducati	4.0	Triumph	3.6
Harley Davidson	3.4	Yamaha	2.9
Honda	3.1		
Kawasaki	2.8		
KTM	2.3		
Piaggio Group	1.8	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q17 b) The quality of your manufacturer's training

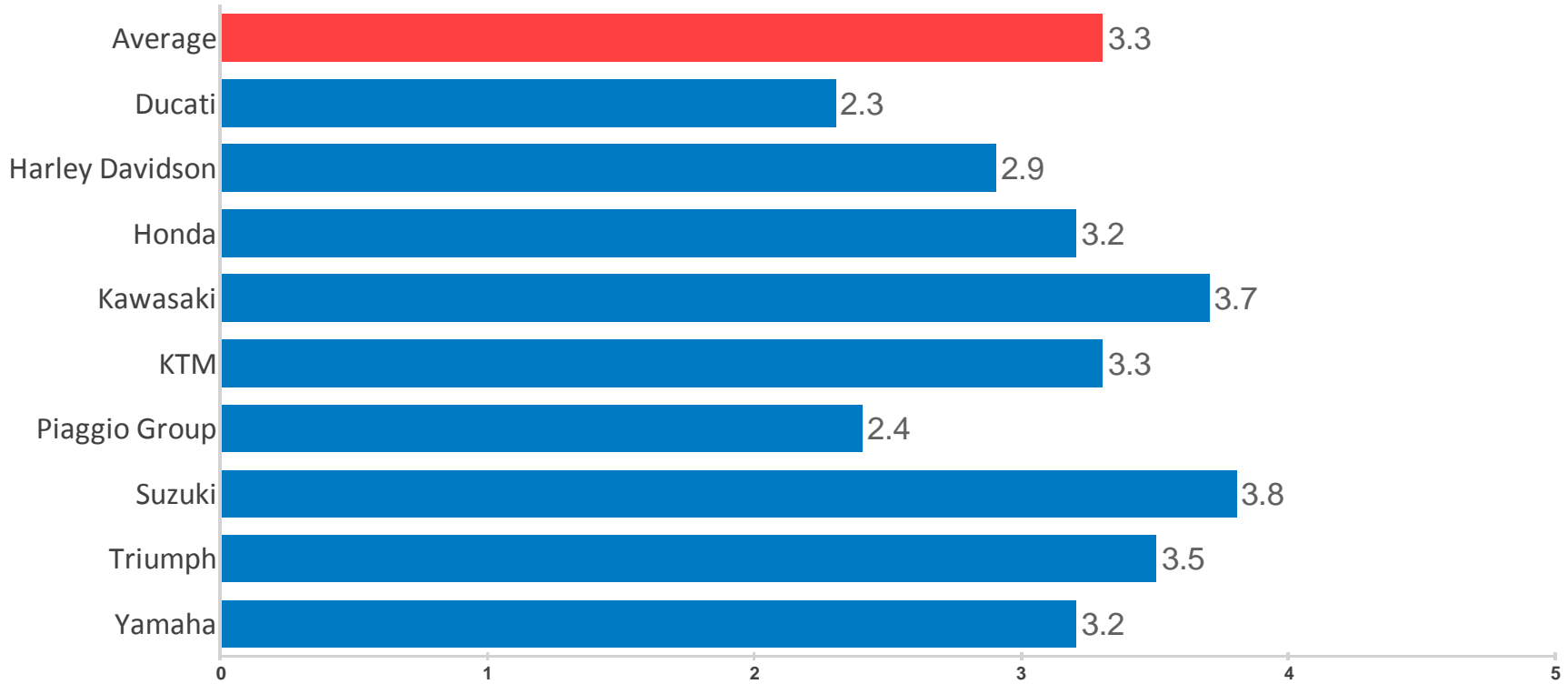


PREVIOUS SURVEY RESULTS – SPRING 2019

17b: The quality of your manufacturer's training			
BMW	4.0	Suzuki	3.7
Ducati	3.5	Triumph	3.6
Harley Davidson	3.1	Yamaha	3.5
Honda	3.3		
Kawasaki	3.6		
KTM	3.3		
Piaggio Group	2.1	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

Q17 c) The cost of your manufacturer's training

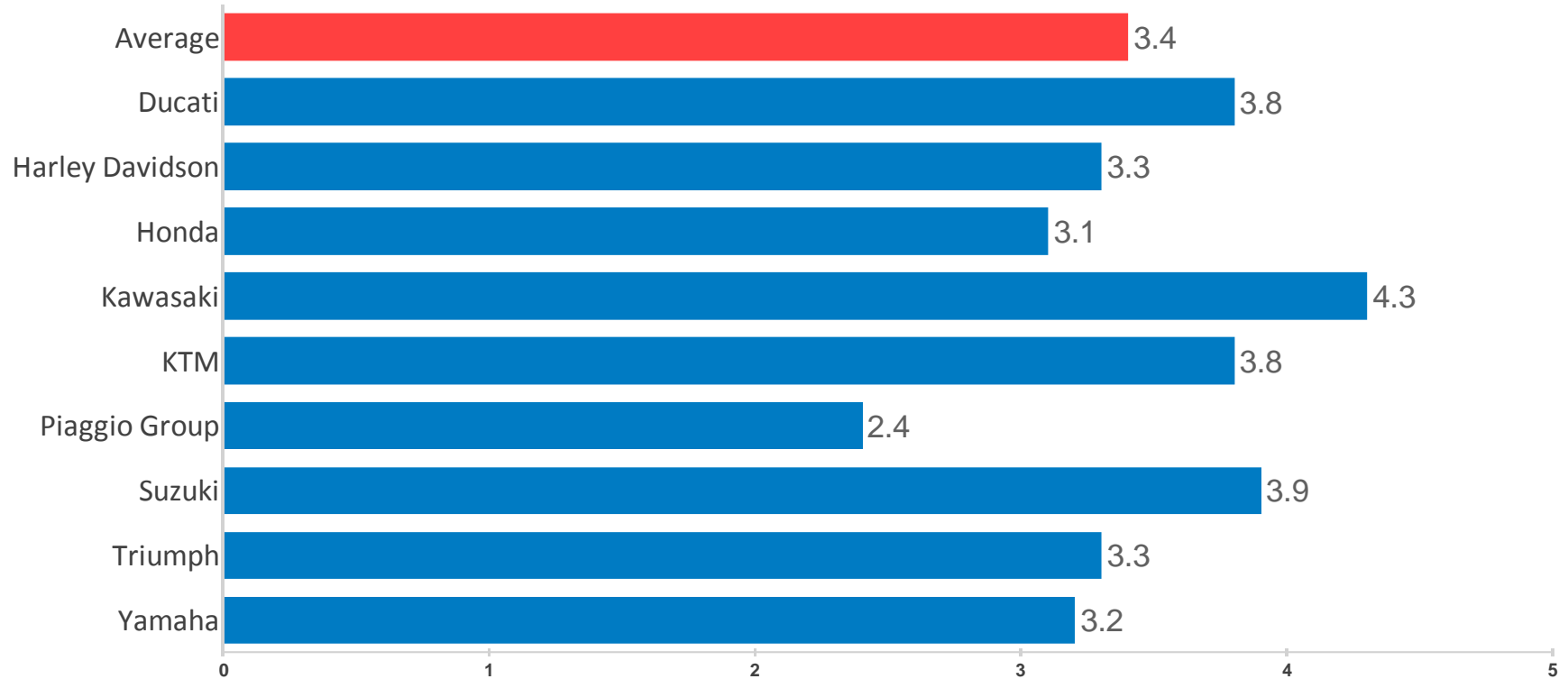


PREVIOUS SURVEY RESULTS – SPRING 2019

17c: The cost of your manufacturer's training			
BMW	2.0	Suzuki	3.5
Ducati	2.5	Triumph	4.0
Harley Davidson	2.4	Yamaha	3.0
Honda	3.3		
Kawasaki	3.2		
KTM	3.7		
Piaggio Group	1.8	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

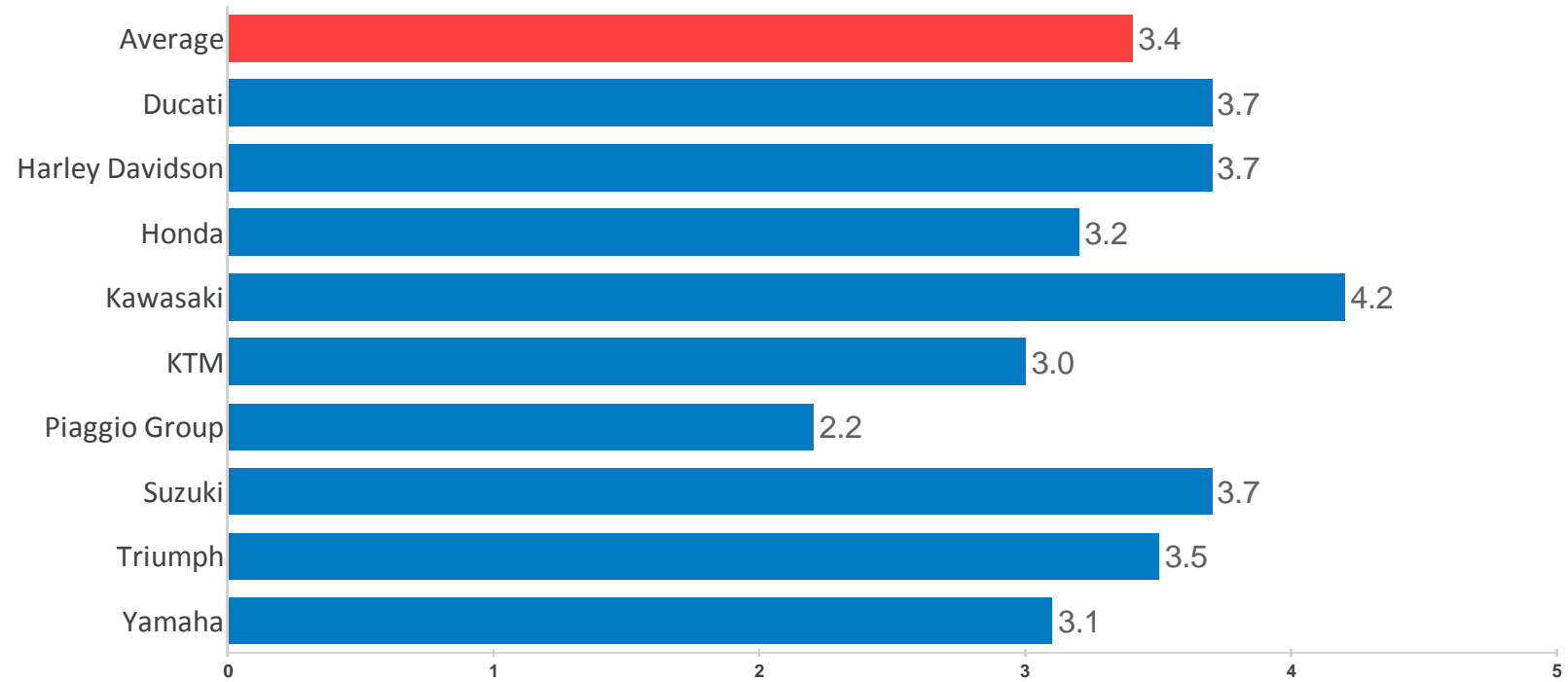


PREVIOUS SURVEY RESULTS – SPRING 2019

17d: Your ability to do business with your manufacturer on a day-to-day basis			
BMW	4.0	Suzuki	3.4
Ducati	4.0	Triumph	4.1
Harley Davidson	2.4	Yamaha	3.0
Honda	3.3		
Kawasaki	3.3		
KTM	3.0		
Piaggio Group	2.1	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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

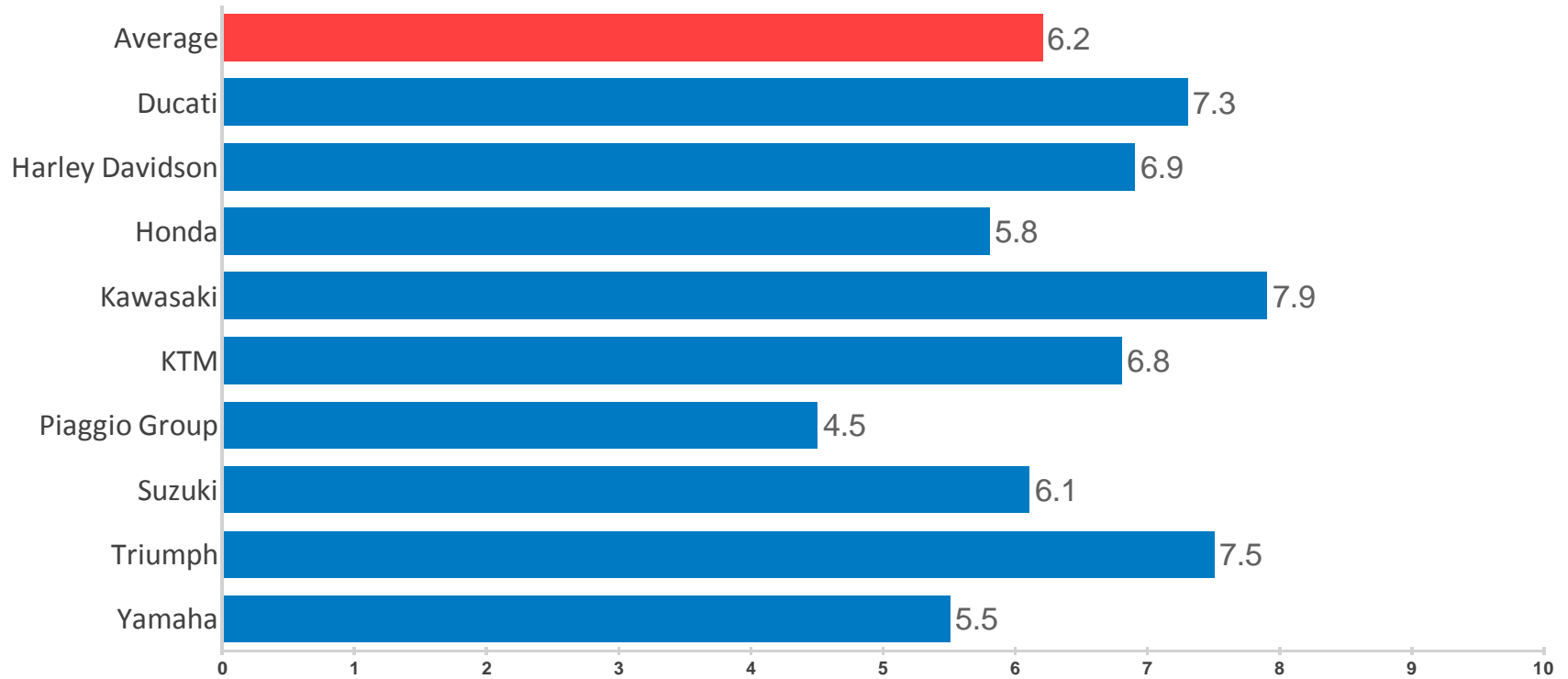


PREVIOUS SURVEY RESULTS – SPRING 2019

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process			
BMW	3.8	Suzuki	3.6
Ducati	4.5	Triumph	3.9
Harley Davidson	2.6	Yamaha	2.9
Honda	3.3		
Kawasaki	3.3		
KTM	2.7		
Piaggio Group	2.0	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

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



PREVIOUS SURVEY RESULTS – SPRING 2019

18: Overall, how do you rate the value of holding your motorcycle franchise			
BMW	6.0	Suzuki	6.3
Ducati	8.5	Triumph	7.4
Harley Davidson	6.2	Yamaha	5.7
Honda	7.0		
Kawasaki	6.7		
KTM	5.0		
Piaggio Group	3.0	AVERAGE	6.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 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			
Triumph	3.8	Suzuki	2.9	Ducati	3.3	Harley Davidson	2.4
Kawasaki	3.8	Piaggio Group	2.8	Honda	2.8	Yamaha	2.2
Ducati	3.7			Suzuki	2.8		
Honda	3.7			Kawasaki	2.8		
Harley Davidson	3.4			Triumph	2.7		
Yamaha	3.2			KTM	2.5		
KTM	3.0	Average	3.4	Piaggio Group	2.5	Average	2.6

7a: Your manufacturer's policy for the supply and stocking of motorcycles				7b: The new motorcycle target negotiating process			
Kawasaki	3.8	Triumph	2.3	Suzuki	3.2	KTM	1.8
Ducati	3.7	Piaggio Group	1.9	Ducati	3.0	Triumph	1.8
Harley Davidson	3.4			Kawasaki	2.8		
Suzuki	3.3			Yamaha	2.3		
Honda	3.0			Honda	2.3		
KTM	3.0			Piaggio Group	2.2		
Yamaha	2.8	Average	3.1	Harley Davidson	2.1	Average	2.5

7c: What is your annual target for this brand				8a: The brand image			
KTM	282.3	Piaggio Group	79.5	Ducati	4.8	Suzuki	3.2
Honda	268.7	Suzuki	67.1	Harley Davidson	4.6	Piaggio Group	3.1
Triumph	193.8			Triumph	4.5		
Yamaha	157.8			Kawasaki	4.4		
Harley Davidson	156.7			KTM	4.0		
Kawasaki	140.5			Honda	3.9		
Ducati	138.3	Average	167.7	Yamaha	3.7	Average	3.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

8b: The product image				8c: Frequency of introduction of new models			
Ducati	4.7	Piaggio Group	3.3	Ducati	4.3	Piaggio Group	2.5
Triumph	4.5	Suzuki	2.7	Triumph	4.3	Suzuki	1.9
Kawasaki	4.5			Kawasaki	4.2		
Harley Davidson	4.3			KTM	3.8		
KTM	4.0			Harley Davidson	3.7		
Honda	3.9			Honda	3.5		
Yamaha	3.8	Average	3.8	Yamaha	3.1	Average	3.3

8d: Retail sales incentives and promotions				8e: Product advertising			
Kawasaki	4.2	Yamaha	2.9	Kawasaki	3.8	Honda	3.0
KTM	4.0	Piaggio Group	2.5	Triumph	3.8	Piaggio Group	2.4
Triumph	3.8			KTM	3.5		
Suzuki	3.7			Ducati	3.5		
Ducati	3.3			Suzuki	3.3		
Honda	3.3			Harley Davidson	3.1		
Harley Davidson	3.0	Average	3.4	Yamaha	3.1	Average	3.2

8f: Have a comprehensive accessory offering that appeals to customers				8g: Have a comprehensive clothing offering that appeals to customers			
Harley Davidson	4.6	Piaggio Group	2.8	Harley Davidson	4.6	Piaggio Group	2.3
Triumph	4.3	Honda	2.5	KTM	4.0	Honda	2.0
Ducati	4.0			Ducati	3.2		
KTM	4.0			Suzuki	3.2		
Yamaha	3.7			Triumph	3.2		
Kawasaki	3.4			Kawasaki	3.0		
Suzuki	3.3	Average	3.4	Yamaha	3.0	Average	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

9: Your manufacturer's warranty policy				10: What is your labour rate for retail before VAT (£)			
Kawasaki	4.0	KTM	3.5	Harley Davidson	85.8	Yamaha	57.4
Yamaha	4.0	Harley Davidson	2.4	Ducati	71.5	Suzuki	54.6
Ducati	3.8			Triumph	64.5		
Triumph	3.8			Piaggio Group	63.9		
Piaggio Group	3.7			KTM	62.5		
Suzuki	3.7			Kawasaki	60.1		
Honda	3.5	Average	3.7	Honda	59.7	Average	60.9

11: What is your labour rate for warranty before VAT (£)				12a: Warranty labour rate			
Harley Davidson	75.2	KTM	48.5	Kawasaki	4.3	Suzuki	2.8
Kawasaki	61.3	Suzuki	42.5	Harley Davidson	4.1	KTM	2.5
Ducati	56.3			Triumph	3.3		
Yamaha	53.2			Piaggio Group	3.2		
Triumph	52.3			Yamaha	3.2		
Honda	50.1			Ducati	3.0		
Piaggio Group	48.6	Average	52.2	Honda	3.0	Average	3.3

12b: Warranty replacement parts policy				12c: Warranty time allowances			
Kawasaki	3.6	KTM	2.3	Kawasaki	4.2	KTM	3.0
Suzuki	3.0	Ducati	2.2	Yamaha	4.0	Harley Davidson	2.7
Harley Davidson	2.7			Ducati	4.0		
Piaggio Group	2.7			Suzuki	3.7		
Triumph	2.6			Triumph	3.7		
Yamaha	2.5			Piaggio Group	3.5		
Honda	2.4	Average	2.7	Honda	3.5	Average	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

12d: Timely and fair settlement of warranty claims				12e: Quality and availability of technical support			
Kawasaki	4.4	Harley Davidson	3.3	Kawasaki	4.4	Ducati	3.0
Ducati	4.2	KTM	3.3	Triumph	3.8	Harley Davidson	2.4
Yamaha	4.2			Suzuki	3.7		
Suzuki	3.9			Yamaha	3.7		
Triumph	3.7			KTM	3.5		
Honda	3.6			Piaggio Group	3.4		
Piaggio Group	3.4	Average	3.8	Honda	3.3	Average	3.6

13: The profit return by representing your franchise				14a: The future profitability of your business			
Ducati	3.5	Harley Davidson	2.3	Ducati	3.5	Yamaha	2.7
Triumph	3.5	Yamaha	2.2	Kawasaki	3.5	Piaggio Group	2.4
Kawasaki	3.4			Triumph	3.5		
KTM	3.0			KTM	3.3		
Suzuki	2.6			Harley Davidson	3.1		
Piaggio Group	2.8			Honda	2.9		
Honda	2.5	Average	2.7	Suzuki	2.7	Average	3.0

14b: Your stocking plan for this franchise				15a: The dealer standards expected by your manufacturer			
Harley Davidson	3.9	Triumph	2.5	Suzuki	3.7	Honda	2.3
Kawasaki	3.4	Piaggio Group	2.5	Harley Davidson	3.6	Yamaha	2.0
Ducati	3.3			Ducati	3.3		
Honda	3.3			Triumph	3.1		
Suzuki	3.3			KTM	3.0		
KTM	2.8			Kawasaki	2.9		
Yamaha	2.7	Average	3.1	Piaggio Group	2.5	Average	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 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			
Harley Davidson	3.3	Piaggio Group	2.2	Ducati	3.5	Yamaha	2.4
Suzuki	3.1	Yamaha	1.8	Kawasaki	3.5	Piaggio Group	2.2
Ducati	3.0			Harley Davidson	3.3		
KTM	3.0			KTM	3.3		
Kawasaki	2.8			Suzuki	3.3		
Triumph	2.7			Triumph	2.8		
Honda	2.3	Average	2.5	Honda	2.8	Average	2.9

16b: The effectiveness of your field sales team				16c: The effectiveness of the field service and parts staff			
Kawasaki	4.3	Honda	3.0	Kawasaki	4.0	Piaggio Group	3.0
Ducati	4.0	Piaggio Group	2.9	Suzuki	3.8	Honda	3.0
Suzuki	4.0			KTM	3.5		
Triumph	3.9			Ducati	3.3		
KTM	3.8			Harley Davidson	3.3		
Yamaha	3.7			Triumph	3.2		
Harley Davidson	3.4	Average	3.6	Yamaha	3.2	Average	3.3

16d: The effectiveness of your manufacturer's retail finance programme				16e: The effectiveness of your dealer council and dealer forums			
Suzuki	3.7	KTM	3.0	Ducati	3.7	Triumph	2.2
Harley Davidson	3.6	Piaggio Group	2.8	Harley Davidson	3.6	Yamaha	2.0
Honda	3.5			Honda	3.1		
Triumph	3.5			Kawasaki	2.7		
Ducati	3.3			KTM	2.7		
Yamaha	3.3			Suzuki	2.6		
Kawasaki	3.2	Average	3.5	Piaggio Group	2.5	Average	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY

17a: The routine procedures and controls expected				17b: The quality of your manufacturer's training			
Kawasaki	3.7	Triumph	2.8	Kawasaki	4.0	Ducati	3.2
Suzuki	3.5	Piaggio Group	2.5	KTM	4.0	Piaggio Group	2.6
Harley Davidson	3.4			Suzuki	3.7		
Ducati	3.3			Harley Davidson	3.6		
KTM	3.0			Triumph	3.5		
Yamaha	2.9			Yamaha	3.5		
Honda	2.8	Average	3.1	Honda	3.4	Average	3.5

17c: The cost of your manufacturer's training				17d: Your ability to do business with your manufacturer on a day-to-day basis			
Suzuki	3.8	Piaggio Group	2.4	Kawasaki	4.3	Honda	3.1
Kawasaki	3.7	Ducati	2.3	Suzuki	3.9	Piaggio Group	2.4
Triumph	3.5			Ducati	3.8		
KTM	3.3			KTM	3.8		
Honda	3.2			Harley Davidson	3.3		
Yamaha	3.2			Triumph	3.3		
Harley Davidson	2.9	Average	3.3	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	4.2	KTM	3.0	Kawasaki	7.9	Yamaha	5.5
Harley Davidson	3.7	Piaggio Group	2.2	Triumph	7.5	Piaggio Group	4.5
Ducati	3.7			Ducati	7.3		
Suzuki	3.7			Harley Davidson	6.9		
Triumph	3.5			KTM	6.8		
Honda	3.2			Suzuki	6.1		
Yamaha	3.1	Average	3.4	Honda	5.8	Average	6.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2019 SURVEY